MySource

Documentation

User Manual MySource v2.8.* The Core System

Contents Overview

Chapter 1 Introduction 10

Chapter 2 What is MySource? 13

Chapter 3 MySource Concepts 16

Chapter 4 Getting Started 22

Chapter 5 The Web System 28

Chapter 6 Edit Site 34

Chapter 7 Edit Page 50

Chapter 8 Content 61

Chapter 9 All About Links 71

Chapter 10 More on Tables and Formatting 80

Chapter 11 Attachments 92

Chapter 12 MySource Cell Types 99

Chapter 13 MySource Page Templates 108

Chapter 14 Custom Form 124

Chapter 15 The Users System 170

Chapter 16 Access Groups 181

Appendix 1 HTML Cheatsheat 189

Full Contents

Chapter 1 Introduction 10

Who should read this manual 10

What this manual covers 10

What you need before you start 11

System Requirements 11

Chapter 2 What is MySource? 13

MySource, Web Servers and the Internet 13

Maintaining Your Site With MySource 15

Chapter 3 MySource Concepts 16

How MySource Displays a Page 16

MySource Core and Modules 17

MySource Users and Administrative Levels 18

MySource Security 20

Chapter 4 Getting Started 22

Logging In 22

Navigation 23

Web System Breadcrumb Trail 24

MySource Common Icons 25

Chapter 5 The Web System 28

The Web System 28

Sites 29

Security 31

Designs 32

Wizards 33

Chapter 6 Edit Site 34

Site Properties 36

Workshops 2 - 4 41

Security 45

Chapter 7 Edit Page 50

Page Properties 52

Security 57

Wizards 60

Chapter 8 Content 61

Contents: Standard Tab 61

Chapter 9 All About Links 71

URL Info 72

Pages and Files 73

Anchors on Current Page 74

Options 74

Chapter 10 More on Tables and Formatting 80

Edit Table Properties 80

Duplicating a Table 84

Edit Cell Properties 84

Chapter 11 Attachments 92

More About Loading and Linking to Files 92

Edit Page - Attachments Tab 93

Edit Page - Edit File Screen 95

Chapter 12 MySource Cell Types 99

Selecting a Cell Type 99

Raw HTML Cell Type 100

File/Image Cell Type 103

iFrame Cell Type 105

Nest Content Cell Type 106

Chapter 13 MySource Page Templates 108

Selecting a Page Template 108

Forbidden (login page) 110

Pull Content Page Template 114

Redirect Page Template 118

Sub Page Listings Template 119

Chapter 14 Custom Form 124

Custom Form Tabs 124

About Forms 125

Contents: Custom Form 126

Form Tab 128

Options Tab 149

Format Tab 154

Submission Logs Tab 157

Load/Save Parameters Tab 160

Chapter 15 The Users System 170

General Tab 171

Edit User Screen 173

Edit Organisation 176

Wizards Tab 180

Chapter 16 Access Groups 181

Edit Access Group 182

Attributes 183

Appendix 1 HTML Cheatsheat 189

Workshops

Workshop 1 Creating a New Site 30

Workshop 2 Creating Pages 41

Workshop 3 Reordering Pages 43

Workshop 4 Moving Pages 44

Workshop 5 Adding content to a page 62

Workshop 6 Copying and Pasting into the WYSIWYG Editor 65

Workshop 7 Inserting Images 66

Workshop 8 Uploading/Attaching a File 69

Workshop 9 Linking to an Internal Page 74

Workshop 10 Linking to an External Site 75

Workshop 11 Linking to a File that you Upload 76

Workshop 12 Linking to a File that is already attached to another MySource page 77

Workshop 13 Setting up Anchor Links 78

Workshop 14 Inserting a Link to an Email Address 79

Workshop 15 Removing and Editing a Link 79

Workshop 16 Formatting Tables 86

Workshop 17 Copying and Pasting a Table 90

Workshop 18 Overwriting a File Attachment 97

Workshop 19 Creating a Pull Content Page 117

Workshop 20 Defining a Simple Form 163

Workshop 21 Adding a Complex Layout to a Form 166

Workshop 22 Creating and Populating a Site Access Group. 184

Workshop 23 Building a Member's Area for your Site 186

Revision History

Revision	Filename	Date	MySource Version	Comment
V1.1.0	Full Manual v1.1.0.doc	03/02/2004	2.8.6	Moved revision history to front and corrected typographic errors.
V1.0.0	Full Manual v1.0.0.doc	31/01/2004	2.8.6	First Release

Chapter 1 Introduction

The purpose of this user manual is to explain the core functionality of the MySource Content Management System (V2.8.*). In this manual we work through the various screens and tabs, providing detailed explanations and useful tips. We also provide a series of practical workshops.

Who should read this manual

This manual is primarily aimed at users with little or no prior MySource training, who have a basic understanding of the Internet and web publishing using a content management system such as MySource. Although MySource is intended to be simple and intuitive to use, it is a powerful system and there is a lot to learn. This manual takes the beginner through the step-by-step processes involved in creating new pages, adding content, images and links, to get your MySource site up and running quickly and easily.

More experienced users will also find this manual useful in extending their knowledge of the MySource system, as it contains explanations of the different cell types available for editing, (e.g. Raw HTML) and the more advanced page templates (e.g. Custom Form).

Finally, this manual is also targeted at MySource users at a *Super User* level, and covers all the functionality available in the core system, plus a description of who can do what, depending on their user level. Super Users may find this manual useful for training other users of the system e.g. Page Editors.

What this manual covers

This manual covers the core MySource system. It does NOT cover advanced topics such as MySource Modules, other than explaining what these are and how they plug into the core system.

What you need before you start

It is assumed you have a fully installed and operational MySource system that you can access via a valid login and password, a connection to the Internet and a recent version of a web browser such as Internet Explorer 5.5+.

System Requirements

MySource has been optimised to operate on a PC running Internet Explorer version 5.5 or above. MySource can be operated using an older version of Internet Explorer, or on a Macintosh or Linux environment, however the WYSIWYG editor will not be available for use when editing content.

TIP: Please note that content managed by MySource can be viewed by users with older web browsers on any of the major platforms just not edited using the WYSIWYG editor.

Table 1-1 below shows which operating systems and browsers can be used for editing in MySource:

		Operating System		
Browser Version		Windows NT, 2000 or XP	Apple OS 9.1 - OS X	Linux
Microsoft Internet Explorer	Version 5.5 or above	Full Support	Not Supported	Not Supported
Microsoft Internet Explorer	Version 5.0 or below	Limited Support	Limited Support	Not Supported
Netscape	Version 4.0.6 or above	Limited Support	Limited Support	Limited Support
mozilla	Version 1.0 or above	Limited Support	Limited Support	Limited Support

Table 1-1 MySource Supported Operating Systems and Browsers

Key

Support Type	Meaning
Full Support	Access to the full MySource System
Limited Support	Access to the MySource System excluding WYSIWYG Editor
Not Supported	No Access to the MySource System

TIP: you can download the latest version of Internet Explorer (which at the time of writing is v6.0) for free from www.microsoft.com

Chapter 2 What is MySource?

In this chapter, we talk you through the role of MySource as a Content Management System (CMS). It is important that you have at least a basic understanding of how a CMS works, before we move on to the details of how to create your website.

A Content Management System such as MySource has many functions, however the two we will focus on are:

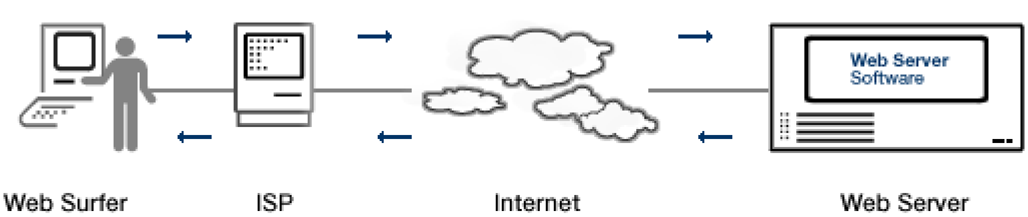
1. The ability to deliver your web pages to a web surfer's browser, and
2. Tools to allow you to maintain the content of your web site.

To understand these two functions more clearly, we will explain how MySource works with a web server and the Internet. We will then show you how maintaining your website content fits into the equation.

MySource, Web Servers and the Internet

The Internet is a vast network of computers around the world, swapping information. A web site is a collection of linked files that can be viewed on the Internet by going to the address of the site (URL) through a web browser. The files comprising a website reside on a web server, which is constantly connected to the Internet.

How Browsing a Non-MySource Website works:



1 A web surfer connects to the Internet typically through an ISP (Internet Service Provider), so when a surfer tries to browse a page, the request firstly goes via their ISP to the Internet (World Wide Web).

2 The web server receives the request for the page, retrieves it from its file system, and sends the requested information back to the web surfer's browser, via their ISP.

3 The browser program (e.g. Internet Explorer) displays this information in the form of a web page.

TIP: If you use a common web publishing tool such as DreamWeaver, you edit your website files in your local development environment and then transfer them over to your web server.

How Browsing a MySource website works:

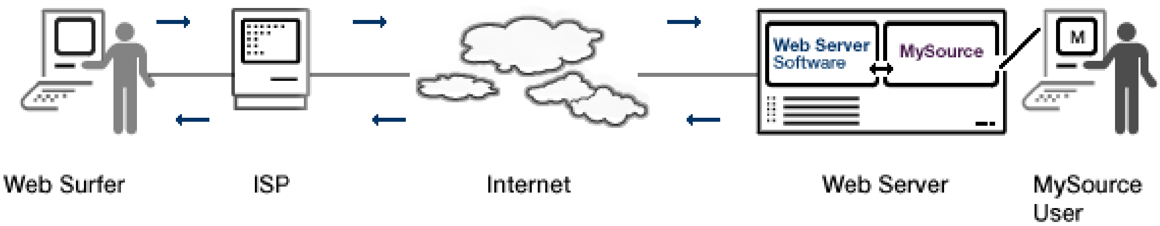
If you are using MySource to maintain your website, it is installed on the web server computer along with the web server software (usually Apache).

1 When the web server receives the request for the page, it requests the page from the MySource system.

2 The web server sends the MySource page back to the web surfer's browser.

Looking at your MySource site via a browser, is sometimes referred to as looking at your site at the "front-end".

Maintaining Your Site With MySource



When you use MySource to maintain the content of your website, you are editing the pages that will be returned to the web surfer's browser via the web server. You define how your website is structured, and the contents of the pages within the MySource user interface. This is sometimes referred to as editing the site in the "back-end".

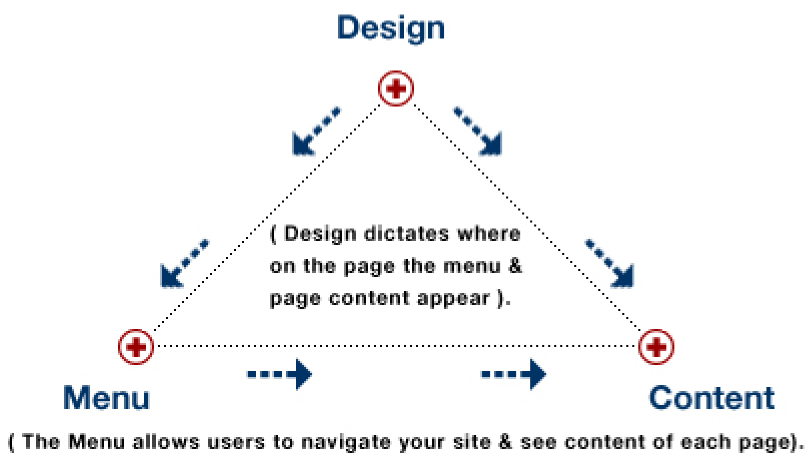
In this manual, we talk about editing pages in MySource (i.e. in the back-end), and their appearance in your website (i.e. in the front-end).

Chapter 3 MySource Concepts

In this chapter, we go through the basic concepts used within MySource. It is important to understand these concepts, before we move on to the details of how to create your website in Chapter 5 and beyond.

How MySource Displays a Page

MySource uses the three components of **design**, **dynamic menu/navigation** & **content** to display a page:



Design

This is the component that dictates where the fixed design (e.g. company logo), dynamic menu/navigation and content area appear on each page of the site (sometimes referred to as a "skin").

Designs are a complicated component, requiring design and HTML and MySource coding skills and for the purposes of this manual, it is assumed that a MySource design has already been created and loaded to your system.

Dynamic Menu/Navigation

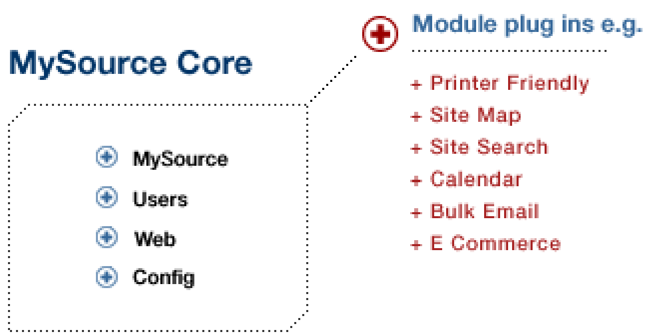
The menu consists of pages that exist in your site and allows web surfers to navigate through your site. It is dynamic in that how you build your pages and structure your sitemap in the back-end is what gets reflected on the front-end as your site's menu/navigation system. Pages can easily be renamed and reordered in the back-end and this will be dynamically generated on the front-end.

Content

Content refers to all other components of a page including text, images, links etc. You can control the layout and formatting of the content for each page in your site using an editing interface such as the user-friendly WYSIWYG (What You See Is What You Get) editor.

MySource Core and Modules

MySource is made up of core components and optional module plug-ins, as shown in the diagram below:



MySource Core

MySource core has the following components:

- **MySource**: this component has information about latest releases, links to report bugs etc.
- **Users**: this component allows you to create, edit and delete MySource user accounts.
- **Web**: this component is where you edit your content. This includes creating, editing and deleting sites, pages and files. Designs are

also created in this area and most MySource Modules are also accessed through the Web component.

- **Config**: this component contains a list of configuration settings that apply to your entire MySource system (e.g. the name of the MySQL database, webmaster email address, etc). This component is for the use of super users only, and is not discussed in detail in this document.

Modules:

MySource modules are extensions to the core MySource system that provide more advanced functionality e.g. bulk email, e-commerce etc. MySource modules are not described in detail in this document.

MySource Users and Administrative Levels

There are three types of users that access your MySource site:

- **The Web Surfing Public:** those "surfing the net" who visit pages of your site.
- **Members:** you can create a member's area for your site, where access can only be gained by logging in. These members must have a user account within your MySource system and be assigned to an appropriate *Access Group*. Chapter 16 explains how to set up *Access Groups* and a member's area.
- **Back-end Administrators:** MySource facilitates various levels of back-end administrators, from *Super Users* to *Page Editors*, all with varying levels of permissions.

  Table 3-1 below shows the different MySource administrative accounts and who can do which tasks. This will also be covered in greater detail in Chapter 6 and Chapter 7 where we explain how to assign users to be Site Editors, Page Administrators etc, and in Chapter 15 where we look at the *Users* component of MySource.

	User Level							
	System			Site		Page		
Task	**Super User**	**Web Master**	**User Master**	**Site Admin**	**Site Editor**	**Page Admin**	**Page Editor**	**Front end Page editor**
Create/ delete a site	✓	✓						
Create/ delete a page	✓	✓		✓	✓			
Create/ edit/ delete a MySource user account	✓		✓					
Create/edit/ delete a MySource design	✓	✓						
Change page status to *Live*/edit a live page	✓	✓		✓		✓		
Change page status to *Safe Edit*/safe-edit a live page	✓	✓		✓	✓	✓	✓	
Re-order or move pages	✓	✓		✓		✓		
Read-only all pages in the backend								✓
Assign/demote a web master	✓							
Assign/demote a user master	✓							
Assign/demote a site administrator	✓	✓						
Assign/demote a site editor	✓	✓		✓				
Assign/demote a page administrator	✓	✓		✓				
Assign/demote a page editor	✓	✓		✓	✓	✓		
Assign/demote a read-only editor	✓	✓		✓	✓	✓		

Table 3-1 User Levels and Tasks

MySource Security

Security is an integral part of the MySource system, and you can restrict access to your site (i.e by users at the front-end) and to your MySource system (i.e. the back-end).

TIP: Granting access to users is referred to as granting *Read Access*. Granting access to back-end administrators is referred to as granting *Write Access*.

Read Access

You can allow or restrict public access for specific pages (e.g. a Member's Area), or an entire site (e.g. an Intranet). If the site is inaccessible by the public, you must choose the groups of users to whom you wish to grant access. These groups of users are known as *Access Groups* in MySource, and you can define them either at the *Web System* or *Site* level, and grant access to them at the *Site* and *Page* level:

- **Web System Level:** you can define *General Access Groups* on the *Web System Security* tab which you can use to grant access for any site or page in your MySource system.
- **Site Level:** you can define *Site Access Groups* on the *Security* tab for a particular site, which can be used to grant access to pages within that site. You can also grant access to a *General Access Group* at the site level.

TIP: Granting an *Access Group* access at the *Site* level allows that group of users access to every page in the site. You do not need to grant access to individual pages.

- **Page Level:** you can grant access to either a *General Access Group* or *Site Access Groups* on the *Security* tab for a particular page.

Write Access

Write access is granted at the *System*, *Site* and *Page* level:

- **System Level**: you specify which users are *Super Users*, *Web Masters* and *User Masters* at the *System* level on the *Config* tab.
- **Site Level:** on the *Security* tab at the *Site* level, you can specify which users are *Site Administrators* and *Site Editors* for that particular site.

- **Page Level:** on the *Security* tab at the Page level, you can specify which users are *Page Administrator*, *Page Editor* and *Frontend Page Editors* for that particular page.

The tasks which can be performed by *Site Admins/Editors, Page Admins/Editors* and *Frontend Page Administrators* are shown in Table 3-1 above.

Chapter 4 Getting Started

Now that you know a few of the fundamentals, you are ready to get started!

All you need is a connection to the Internet, the URL of the site you want to work on (e.g. testsite.beta.squiz.net) and a valid login and password to the MySource system.

Logging In

To access the MySource system, the first thing you need to do is login. To login, add the suffix "/_edit" to the end of the site URL as shown below:

Figure 4-1 Accessing Your MySource System

TIP: It doesn't matter what page of your site you are in, when you add /_edit you will be taken to that particular page in the MySource system.

Once you have hit enter, you will be presented with a login screen as shown below:

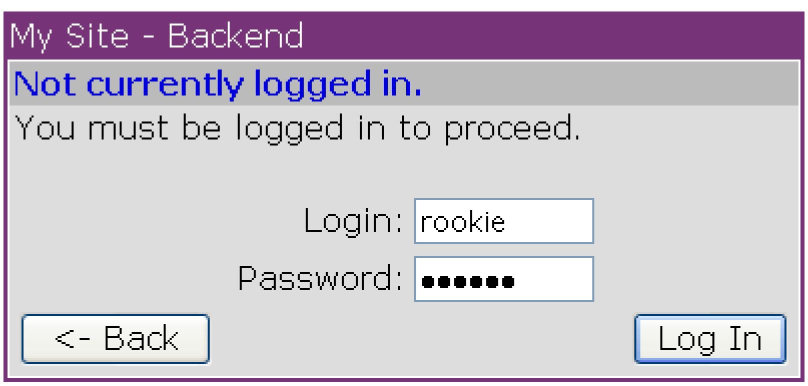


Figure 4-2 The Login Screen

When you are logged in successfully, you will enter MySource in the *Web System*, either at the *Site Properties* screen of the site, or the *Page Properties* screen of the page – depending on whether you entered the URL of a site or a page. These screens are discussed in Chapter 6 and Chapter 7.

TIP: If you are inactive for a long period of time when you will be prompted to login again, so for security reasons it is good practice to log out at the end of each session.

Navigation

At the top of every screen in MySource you will find the navigation bar for the four main areas of the core system, and a module drop down list. You will also see your login name and the log out icon (open door) on the right as shown below:

Figure 4-3 The MySource Navigation Bar

The four main areas of the core MySource system are as follows:

Clicking on the *MySource* icon takes you to the MySource system summary page, featuring news and links to general MySource bug reporting and community forums.

Clicking on the *Users* icon takes you to the Users section of MySource where you create, edit and delete MySource user accounts. This area of the system is restricted to authorised users (User Masters or Super Users) only.

Clicking on the *Web* icon takes you to the content management area of MySource. This area is also restricted to authorised users, but the majority of users have some form of access to this area.

Clicking on the *Config* icon takes you to the system configuration area where the MySource settings can be configured. Access to this area is limited to Super Users only.

This drop down list allows you to go to one of the modules installed in your system.

TIP: If you roll your mouse over any of the icons found throughout MySource, a tool tip will be displayed telling you what will happen when you click on that particular icon. Rolling over icons when you are new to the system or unfamiliar with an area will help you to familiarise yourself with the MySource environment.

TIP: Always use MySource icons for navigation rather than using the *Back* button of your browser.

(As for any browser based application, the browser *Back* button causes a page expiry error, because the page content will be re-submitted to MySource each time you use the *Back* button to revisit a page).

Web System Breadcrumb Trail

When you are in the *Web System*, a navigational tool known as a breadcrumb trail appears in the grey bar just underneath the main MySource navigation bar. This is particularly useful when you have a complex hierarchy of pages, with parent pages and sub-pages.

An example is given in Figure 4-4 below, where we are currently editing a sub-sub-page of "Page 2", within a site named "Test site".

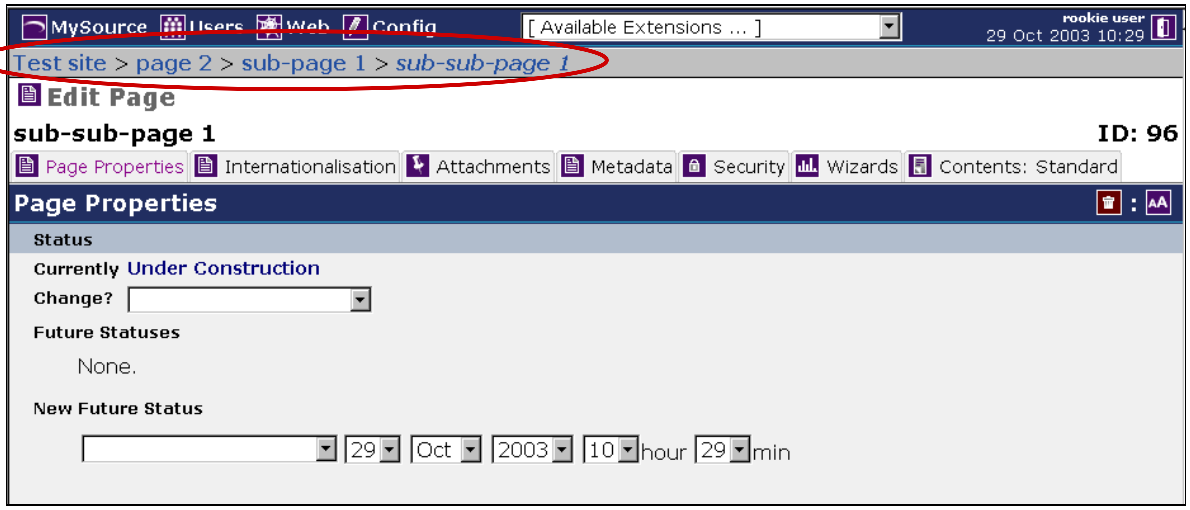


Figure 4-4 Breadcrumb Trail

You can click on the "sub-page 1" or "page 2" to edit the parent pages, or click on "Test site" to edit the site.

You can click on the *Web System* icon  to return to the *Web System* screen.

Editing sites and pages is discussed in detail in Chapter 6 and Chapter 7 respectively.

MySource Common Icons

There are a number of icons that are common across the Edit Site, Edit Page and Edit File screens. These screens have icons on the top right hand side and a Commit button at the bottom, which are described below:

Preview Clicking the *Preview* icon opens a new browser window and displays the site, page or file that you are currently editing.

Delete Clicking the *Delete* icon deletes the current site, page, file or access group that you are editing.

If you are editing a site or page, any attachments and sub-pages that are related to the page or site are also deleted. Whatever you delete is unrecoverable, so **BE VERY CAREFUL**. The system has several inbuilt warning messages to reduce the risk of losing data by mistake.

If you proceed, a progress bar will appear to show you when the deletion is complete.

Duplicate

Clicking on the *Duplicate* icon will create a copy of the site or page as well as any sub-pages, file attachments, site administrators etc.

This function may take some time to complete, particularly if there are many attachments or sub-pages. A screen prompt is displayed to ensure that you wish to proceed and if you do, a progress bar appears giving you an estimate of the time remaining for the duplication process to be completed

At the very bottom of most screens in MySource, you will find the *Commit* button. Click this button to save any changes that you make to the system. If you are using Internet Explorer, you can use ALT + S as a keyboard shortcut.

Messages Window

Any changes you make to the MySource system are logged in a window called *Messages* as shown below:

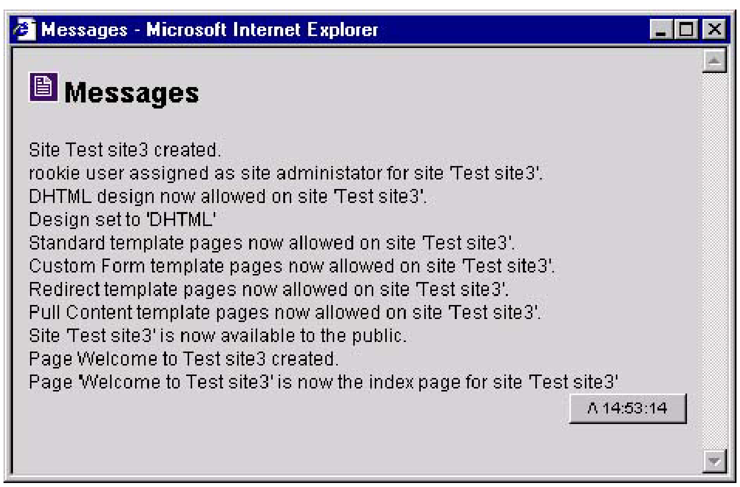


Figure 4-5 The Messages Window

You can refer to the *Messages* window at any point to check the changes committed to your system.

TIP: If you close this window, it will pop up every time you commit changes, which can be distracting. It is therefore a good idea to minimise the *Messages* window.

In the next chapter, we provide an introduction to the *Web System* which is where you manage the content of your MySource site.

Chapter 5 The Web System

In this chapter we introduce you to the ***Web System*** and in particular, the ***Sites*** tab where you access existing sites within your MySource system and create new sites.

In the first workshop, we create a new site. The chapter then concludes with an explanation of the other tabs within the Web System: Security, Designs and Wizards.

If you are only concerned with editing content at this stage, skip the final part of this chapter and move on to Chapter 6, where you learn how to create new pages and restructure the site map.

The Web System

The Web System can be accessed at any time by clicking the *Web* icon in the MySource navigation bar:

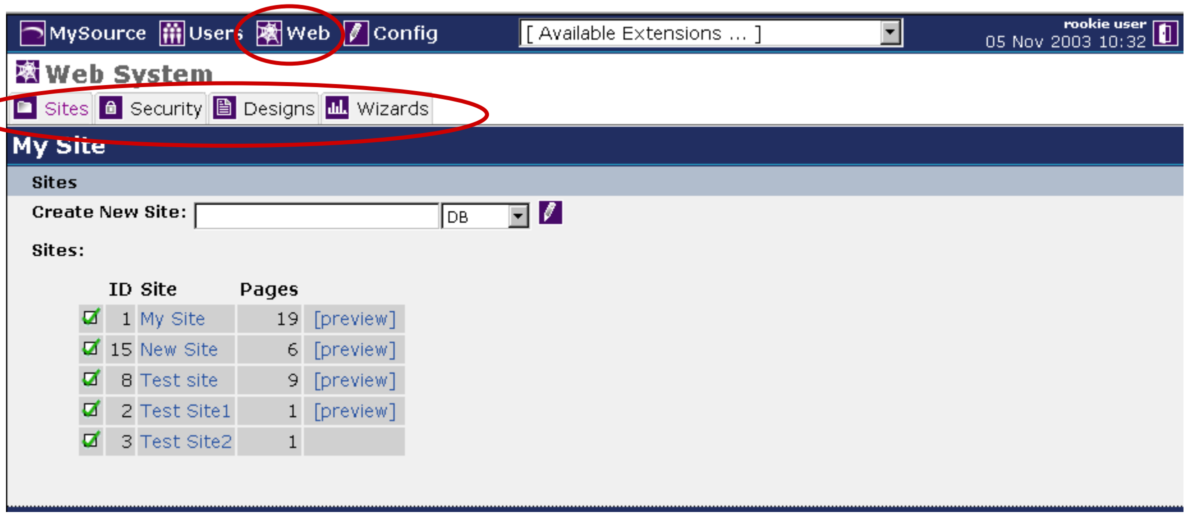


Figure 5-1 Web System

As seen in Figure 5-1 Web System above, within the *Web System* you have the following tabs:

- **Sites:** When you first enter the *Web System*, you are taken directly to the *Sites* tab, which allows you to manage your site and its contents.

- **Security:** this tab allows you to define the *General Access Groups* to be used to grant read access to any of the sites within your MySource System. This tab is described in more detail in the following sections, and in Chapter 16.

- **Designs:** the *Designs* tab contains a list of MySource designs that have been loaded into your system, and is where you can edit existing designs and create new ones. However, this requires skill in creating designs and a knowledge of HTML code and specific MySource tags, which is not covered within the scope of this document.

- **Wizards:** the Wizards tab contains a list of wizards that have been loaded to your system. Wizards are an integral part of the MySource System, and come in the form of reports and tools.

TIP: Whichever tab you are in will be highlighted to show where you are.

Sites

The *Sites* tab lists all the sites within your MySource system; as shown in Figure 5-1 above.

For each site you can see following:

- **Public checkbox: a** site marked with a is public and therefore visible to the web surfing public.

  A site marked with a is private and therefore not visible to the public, only to members of a particular *Access Group* with appropriate permissions. We explain how to set up *Site Access Groups* in Chapter 16.

- **the site ID**

- **the site name**

- **the number of pages**

- **a link to preview that site**

TIP: If there is no link to preview a site, it is because no corresponding URL has been set up in the *Site Properties* – this is one of the first things you should do after creating a new site. We show you how to do this in the first workshop.

To edit a site, click on the name of the site you want to edit and you are taken to the *Edit Site* screen with the *Site Properties* tab selected. This screen is covered in detail in Chapter 6.

Workshop 1 Creating a New Site

Firstly, make sure you are on the *Web System* screen. If not, click on the *Web* icon in the MySource navigation bar.

1. Type the name of the new site into the *Site Name* text box e.g. Test Site. Note that you can easily change this later.

2. Select a design from the drop down list (again this can be changed easily later).

3. Click the *Create New Site* icon.

   A message window pops up to confirm the addition of the new site to your system and the Site Properties screen for the site you have just created is displayed. The Site Properties screen is covered in detail in the next chapter.

4. At the very bottom of the Site Properties screen, enter the URL for the new site e.g. www.mysite.com/testsite, and click the Commit button.

TIP: You must enter the full URL including your website URL.

5. Click on the Web icon again to get back to the Web System screen and the new site is now listed along with a link to preview it.

♣ You have now successfully completed Workshop 1 ♣

Security

The *Security* tab is shown in the diagram below:

Figure 5-2 Web System Security Tab

The *Security* tab within the *Web System* contains a list of all current *General Access Groups* that have been created for your MySource system. *General Access Groups* can be used to grant read access for any site you have defined within MySource.

Read Access

- **Gen. Access Groups:** the *ID* and the *Access Group Name* are shown for each *General Access Group* defined. Clicking on the name of a *General Access Group* will take you to the *Edit Access Group* screen for that *Access Group*.
- **New General Group:** type the name into the text box and click on the *Commit* button. You will be taken to the *Edit Access Group* screen.

Access Groups and the *Edit Access Group* screen are explained in more detail in Chapter 16.

Designs

The *Designs* tab is shown in the diagram below:

Figure 5-3 Web System Designs Tab

The *Designs* tab contains a list of all current *Designs* that have been created for your MySource system.

Site Designs

- **Existing Designs:** the *ID*, *Name*, *Last Modified Date*, and *Last Modified By* details are shown for each design defined. Clicking on the name of a design will take you to the *Edit Site Design* screen for that design.
- **Create New Design:** type the name of the new design into the text box and click on the *Commit* button. You will be taken to the *Edit Design* screen.

Creating designs is outside of the scope of this MySource core user manual.

Wizards

The *Wizards* tab is shown in the diagram below:

Figure 5-4 Web System Wizards Tab

The *Wizards* tab allows you to run all of the reports and tools available within the MySource system.

To use the Wizards, simply click on the description of the Wizard you want to use and follow the prompts.

Chapter 6 Edit Site

In this chapter we guide you through the ***Edit Site*** screen and in particular the ***Site Properties*** tab.

The workshops allow you to put this information to use in creating new pages and restructuring the sitemap. This chapter then concludes with a brief explanation of the other tabs within the *Edit Site* screen.

If you are only concerned with editing content at this point, skip this part and move on to Chapter 7 and Chapter 8, where you learn about *Page Properties* and how to add content, including text and images to pages.

The *Edit Site* screen is displayed:

- When you first create a site, and
- When you click on the name of an existing site in the Web System Sites list to edit that site.

The *Edit Site* screen is shown in Figure 6-1 below:

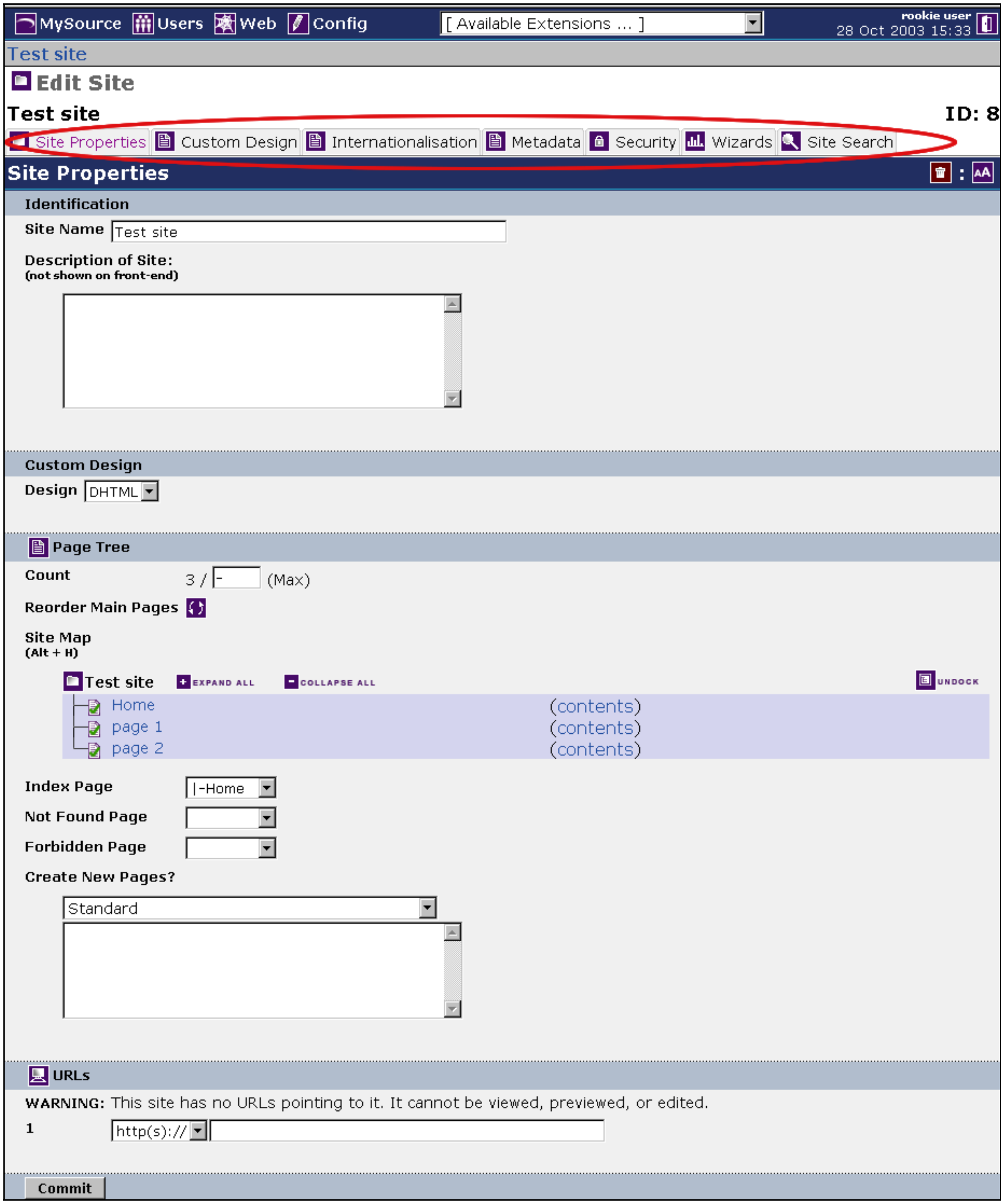


Figure 6-1 Edit Site Screen and Tabs

TIP: To get back to your site list, click on the *Web* icon at the top of the screen.

As seen in Figure 6-1 above, the *Edit Site* screen has the following tabs:

- **Site Properties:** when you first enter the *Edit Site* screen, you are taken to the *Site Properties* tab. You set the site name, design, and URL on this tab. You can also see the pages of your site, add new pages and change the order of the pages.
- **Custom Design:** this tab allows you to change certain parameters of the design. However as this requires understanding of design and HTML code, this is not covered within the scope of this manual.
- **Internationalisation:** this tab allows you to activate a specific character set for your website (or a specific page of your site) so that you can add content in that language. No translation functionality is provided; it merely allows you to enter text in the appropriate character set (e.g. Chinese characters).
- **Metadata**: this tab allows you to create your own metadata definitions, or use a pre-existing template such as Dublin Core. Like MySource Designs, metadata is an advanced topic in MySource and we will not go into any further detail in this manual.
- **Security:** this tab allows you to set the access permissions for this site.
- **Wizards**: this tab allows you to run useful reports and tools that apply to each individual site. This is a subset of the reports and tools to those that can be run across the entire system found in the Web System Wizards tab.
- **Site Search:** this tab allows you to search for files or pages within your MySource site by name or ID.

Site Properties

As shown in Figure 6-1 above, the *Site Properties* tab of the *Edit Site* screen consists of four main sections:

- **Identification**
- **Page Tree**
- **Custom Design**
- **URLs**

Identification

The identification section is where you name and describe your site.

- **Site Name:** you can edit the name of your site here. The *Site Name* is used to identify the site throughout the *Web* system. Whatever you enter here, will be displayed at the beginning of the title of the browser window.

- **Description of Site:** you can enter a meaningful description of your site here for internal administrative purposes. This is useful for example, if you have many sites within one MySource system. It will not be seen by the user and should not be confused with the <meta name="description"> tag used by search engines.

Custom Design

- **Design:** by default, every page in your site will inherit the design that is selected from this drop down. You need only change the design for a page that will not follow this convention e.g. the Home page which usually has its own 'front' design and then every inside page will inherit an 'inside' design.

Page Tree

The *Page Tree* section is where you create new pages and control the hierarchy of the pages within the site.

- **Count:** this shows how many pages your site currently contains and allows a Super User to set a maximum limit. The default "–" sign in the text box, shows there is no maximum limit set.

- **Reorder Main Pages**: clicking on this icon brings up a pop-up window, which you can use to re-order your pages. Click on the up and down arrows to re-order the sequence of the pages in your site. The new order will be reflected in the Menu/Navigation system generated for your site.

- **Site Map**: this section shows the hierarchical structure of all the pages in your site and allows you to select pages for editing as shown in Figure 6-2 below:

Figure 6-2 Site Map

Clicking on the page name takes you to the *Page Properties* screen for that page - *Page Properties* are discussed in 0. If you click on a *contents* link, you are taken directly into the *Contents* tab for that page - see Chapter 8 for more on the *Contents* tab.

The following icons are at the top of the Site Map:

EXPAND ALL — Clicking on this icon expands the site map so that all sub pages are also shown.

COLLAPSE ALL — Clicking on this icon collapses the site map so only the top level pages are shown.

UNDOCK — Clicking on this icon undocks the site map and launches it into a new window.

A very useful feature of the undocked site map is that you can make changes to the status of several pages at once as in Figure 4-1 below:

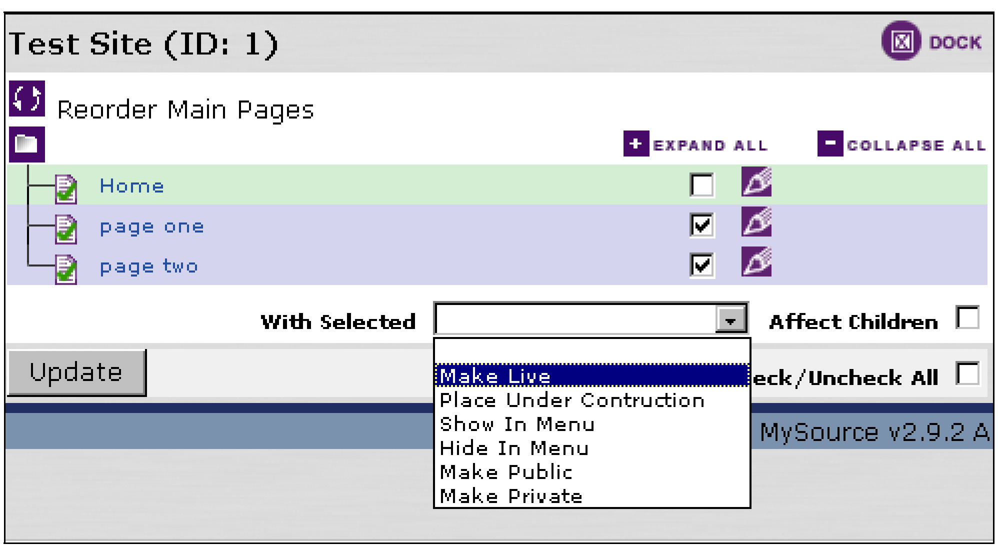


Figure 6-3 The Undocked Site Map

You can select pages in the undocked site map by ticking the tick boxes next to their name, or select *Check/Uncheck All* and *Affect Children* as required.

From the *With Selected* drop down list you can choose an action to be applied to all of the selected pages at once. This is particularly useful when making your site live or putting a section of the site under construction.

To re-dock the site map, click on the *Dock* icon in the un-docked site map or on the *Edit Site Page Properties* tab.

TIP: The PC keyboard shortcut for undocking the site map is Alt+H.

- **Index Page:** you can select the index page of your site here i.e. the first page displayed when someone visits the site. This is otherwise known as the home page.

TIP: When you first create a new site in MySource, a default index page is created called "Welcome to Site Name". If you delete the automatically created index page, be sure to set the new index page.

- **Not Found Page**: the *Not Found Page* indicates the page to display if someone requests a page in your site that does not exist. You may wish to create a page specifically for this purpose, or more typically, select your site's home page.

TIP: Search engines only update their records intermittently, so if you delete a page it is likely some search engines will still display a link to that page. Specifying a *Not Found Page* ensures that a user still comes to your site if they click on a deleted link.

- **Forbidden Page:** this indicates the page to display if someone requests a page that they do not have permission to view.

- **Create New Pages?:** this is where you create new top level pages for your site. The drop down list shows the different page templates available. Page templates are covered in detail in Chapter 13.

TIP: You can add sub-pages to your top-level pages on the *Edit Page* screen, as described in Chapter 7.

URLs

The appropriate URLs or domain names for your site must be added to this list, so that users can view the site. You can enter as many addresses as you like pointing to this site, as long as they are set up on your web server.

For example, you may have the following URL's all for the same site:

MyCompany.com, MyCompany.com.au, MyCompany.net

These URLs must all be set up on both your web server and within MySource.

TIP: If you have not entered at least one URL for your site, you will not be able to preview your pages.

Workshops 2 - 4

The following workshops will help you understand the ***Page Tree*** and ***Site Map*** and how these relate to your site's navigation menu. You will practice adding new pages to your site, reordering those pages and previewing your changes.

Workshop 2 Creating Pages

Firstly, make sure you are in the *Site Properties* tab within the *Edit Site* screen.

1. Scroll down to *Create New Pages?* within the *Page Tree* section as shown in Figure 6-4 below:

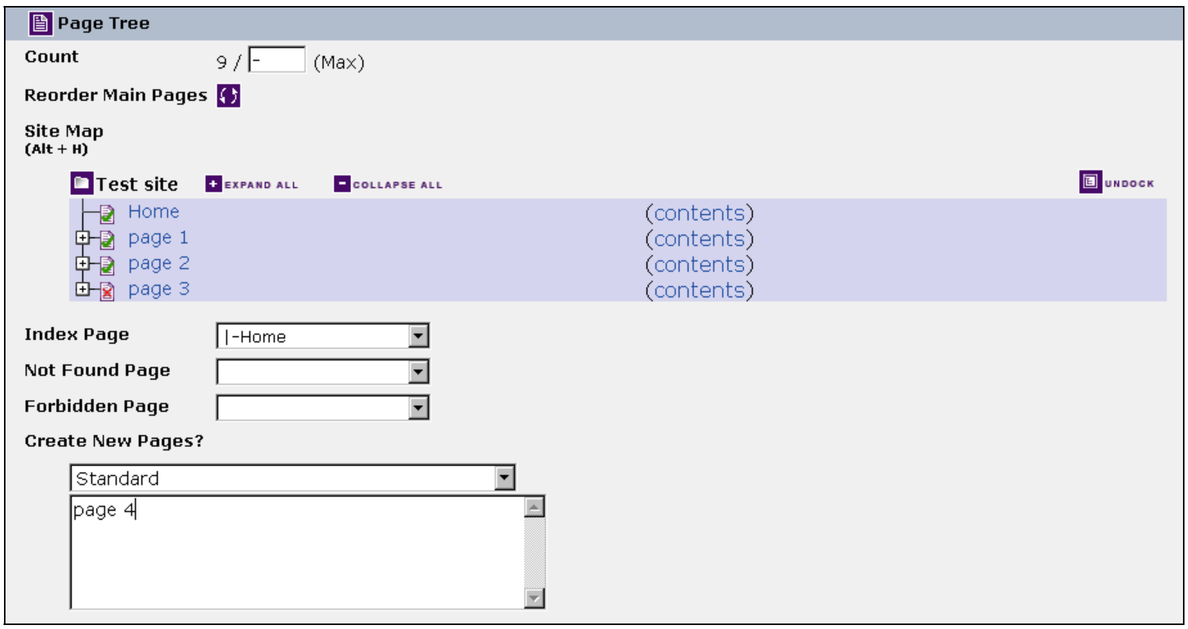


Figure 6-4 Page Tree Section

2. Make sure the page template is set to *Standard*.

3. Type the name of the new page into the text box, e.g. page 4
   (You can create multiple pages at once - just enter each page name on a new line in the text box).

4. Scroll down to the bottom of the screen and click the *Commit* button (or use the PC shortcut Alt+S).

TIP: If you create only one page, you are taken to the *Page Properties* screen for that page.

If you create multiple pages at once, you remain on the *Site Properties* screen. Clicking on the name of the page you want to edit in the site map takes you to the *Page Properties* screen for that page.

5. Click the name of your site in the link in the breadcrumb trail at the top of the screen under the main navigation bar to return to the *Site Properties* screen.

6. Scroll down to the *Page Tree* section and the new page or pages you just created are now shown within the site map.

7. To create a sub-page of "page 1", click on "page 1" in the site map and you are taken to the *Page Properties* screen for "page 1".

8. Scroll down to the *Position* section and find the *New Subpages?* area as shown in Figure 6-5 below.

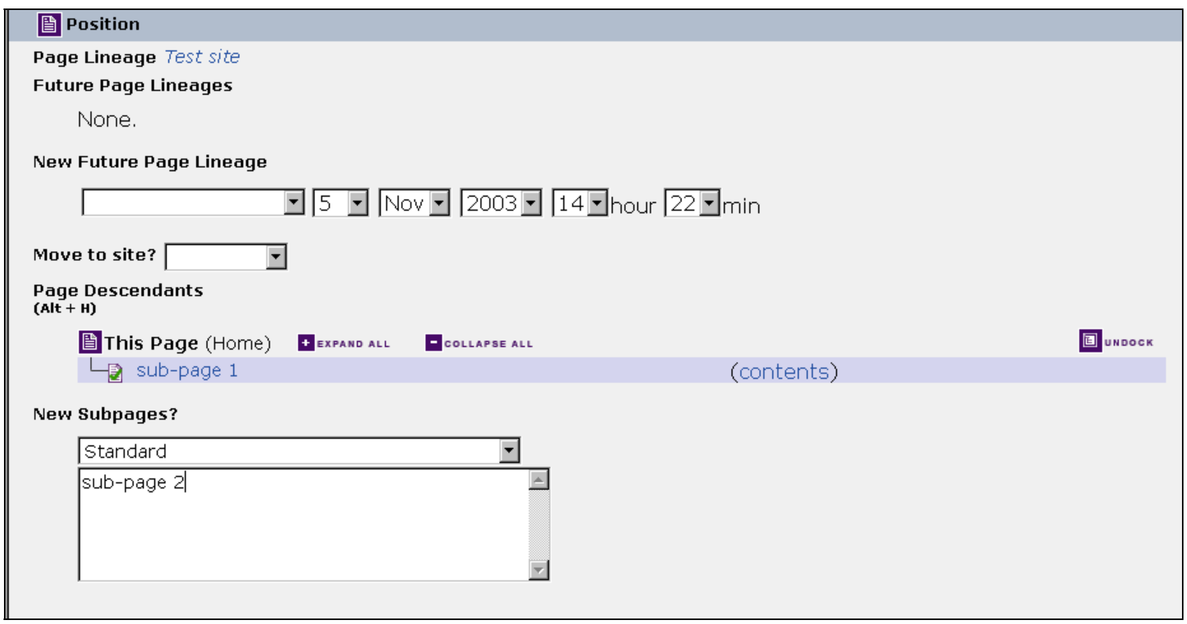


Figure 6-5 Position Section

9. Make sure the page template is set to *Standard*.

10. Type the name of the new sub page into the text box, e.g. "sub-page 2". (Again, you can create multiple sub pages at once - just enter each sub-page name on a new line in the text box).

11. Click the *Commit* button (or Alt+S).

12. Return to the *Site Properties* screen using the navigation links, as before.

13. Now click preview to see how the new page affects the site navigation menu. Hold your mouse over the "page 1" menu item, and your new sub-page appears as a sub-menu item.

TIP: By default all pages are created as a main menu item or a sub-page of another menu item. If you do not want your page to appear as a menu item, but as a link from another page you must uncheck the *Show In Menu* option on the *Page Properties* tab, as described in Chapter 7.

♣ **You have now successfully completed Workshop 2** ♣

Workshop 3 Reordering Pages

Again, make sure you are in Site Properties within the Edit Site screen.

1. Click on the *Reorder Main Pages* icon which brings up the pop-up window shown below:

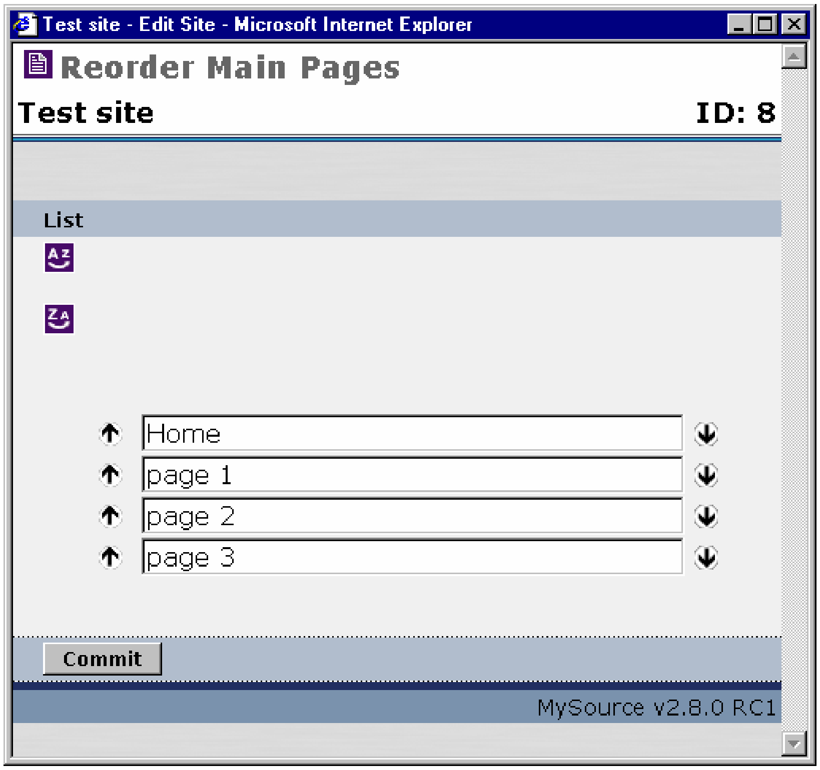


Figure 6-6 Reorder Main Pages Window

2. Click on the *up and down arrows* to reorder the sequence of the pages in your site. You can also order your pages alphabetically *A-Z or Z-A*.

3. *Commit* and *Preview* your changes on the front end.

♣ **You have now successfully completed Workshop 3** ♣

Workshop 4 Moving Pages

It is easy to move pages around, if for example, you have created a page and want to move it to a different section of the site hierarchy.

1. Click on the page icon (public) or (private) of the page you want to move. The prompt box below is shown, asking you to choose a parent page to which to connect:

Figure 6-7 Move Page Window

2. Click OK in the prompt box and then click on the page icon of the page you want to move the original page underneath. If you want the page to be a top level page, click on the site icon at the top of the Site Map. 

3. The page refreshes and you will see that your page has moved.

4. Now click  to preview your changes in your site.

♣ **You have now successfully completed Workshop 4** ♣

Security

Under *Security* at the site level**,** you can do the following:

- Close off access to your site by the public, and grant access by a *Site* or *General Access Group*.
- Create, edit and delete *Site Access Groups* that are specific to this site.
- Define *Site Administrator* and *Site Editor* accounts.
- Control which *Site Extensions*, *Page Templates* and *Site Designs* your *Site Editors* and *Administrators* are allowed to use.

TIP: *Access Groups* contain MySource user accounts and can be used to create a private Members Area or Intranet. For more information on editing and populating *Access Groups* see Chapter 16.

The *Site Security* screen is made up of three main sections – *Read Access Grants*, *Allowed Usage* and *Write Access Permissions* as shown in Figure 6-8:

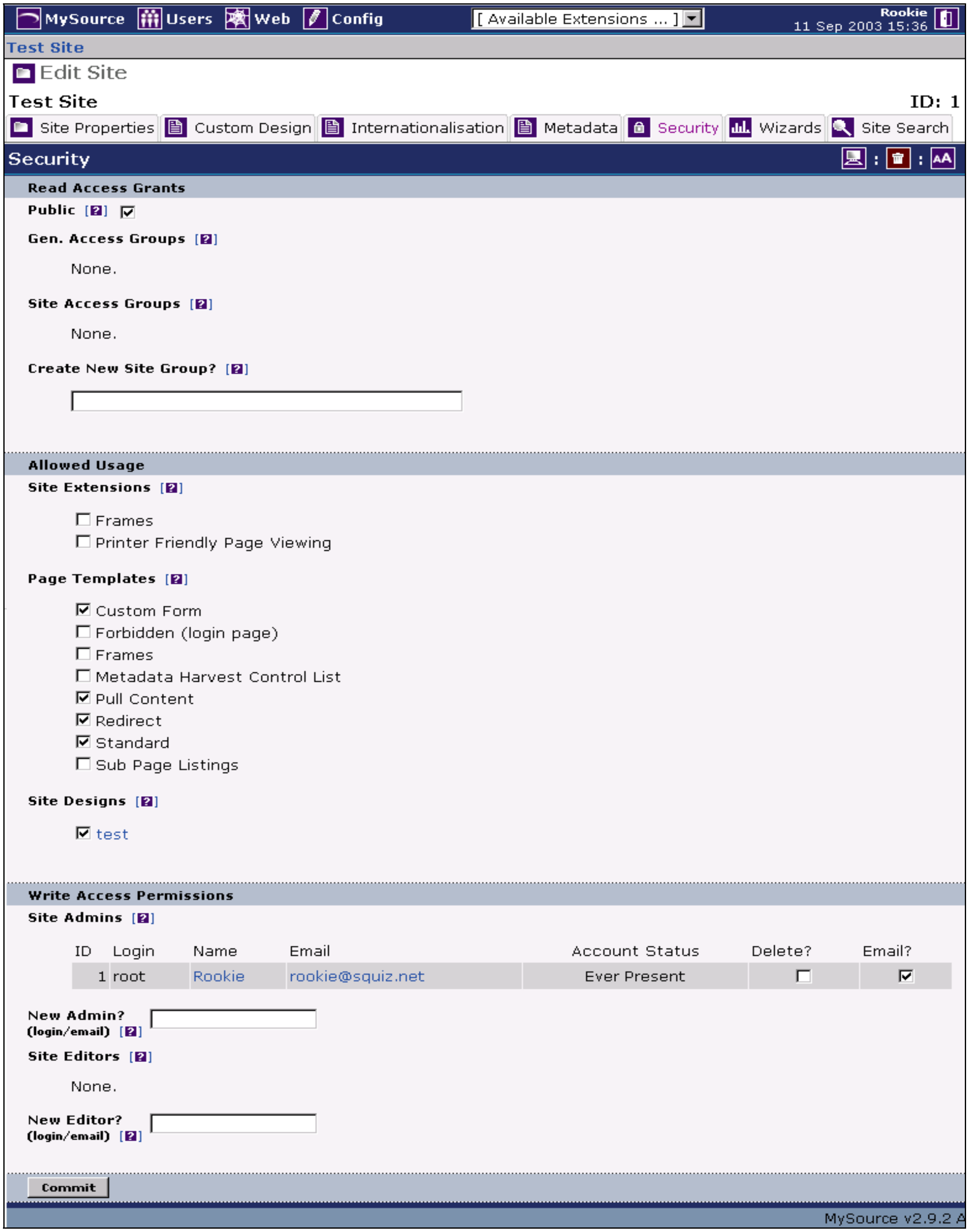


Figure 6-8 Site Security Screen

Read Access Grants

This section allows you to define who can access your site. That is, you can define whether it is a public website, or a private intranet or extranet.

> **TIP: The settings in this section have nothing to do with who can edit your site in MySource. This is defined in the *Write Access Permissions*.**

- **Public:** tick this checkbox to make the site available to the web surfing public.
- **Gen. Access Groups:** a list of all the *General Access Groups* already created in the *Web System*, *Security tab* are shown here.

  Ticking the checkbox next to the *Access Group* makes it accessible in your site by only the users in this group. Clicking on the name of an existing *General Access Group* takes you to the *Edit Access Group* screen for that *Access Group*.

- **Site Access Groups:** a list of all the *Site Access Groups* for the site that you are editing is shown here.
- **Create New Site Group?**: you can create a new *Site Access Group* by typing a name into this textbox and hitting *Commit*. The new *Site Access Group* then appears in the list.

  As for *General Access Groups*, ticking the checkbox next to the Access Group will make it accessible in your site by only the users in this group. If you click on the name of the *Access Group* will take you to the *Edit Access Group* screen for that *Access Group*.

Allowed Usage

This section shows a list of all the *Site Extensions*, *Page Templates* and *Site Designs* currently defined in your MySource system.

If you check any item in the list, your *Site* or *Page Administrators* and *Editors* can use that item. For example, if you check the *Custom Form* page template, your *Site* or *Page Administrators* and *Editors* are able to select the *Custom Form* page template from the *Page Template* drop down list on the *Page Properties* screen (see Chapter 7).

Write Access Permissions

This section allows you to define *Site Administrators* and *Site Editors* for the site you are currently editing.

- **Site Admins**: this section displays a list of all *Site Administrators* for this site. For each *Site Administrator* you can see the ID, Login, Name, Email, and Account Status.

  You can click on the *Name* to display the *Edit Users* screen to edit the details of that user (see page 173 for more on the *Edit Users* screen).

  If an email address has been entered, you can click on the address to email that person directly.

  You can tick the checkbox to delete this *Site Administrator's* write access permissions.

> **TIP: Ticking this checkbox does <u>not</u> delete that user's MySource account – you are merely demoting someone from being a *Site Administrator.***

  Tick the *Email?* checkbox to notify the *Site Admininistrator* whenever a *Site* or *Page Editor* changes the status of a page from *Under Construction* to *Apply for Approval* (see Chapter 7 for more on *Page Status*).

- **New Admin?:** use this textbox to create a new *Site Administrator*.

> **TIP: To create a new *Site Administrator*, a MySource user account must be created first. (Creating MySource user accounts is covered in detail in Chapter 15.)**

  Type the login or email address of the MySource user that you want to make a Site Administrator into the textbox and click on *Commit*.

- **Site Editors:** this section displays a list of all *Site Editors* for this site. The information is the same shown for *Site Administrators* except for the Email? Function that is provided for *Site Editors*.

- **New Editor?:** this section works in the same way as the *New Admin?* section described above.

Site Search

The *Site Search* tab allows you to search for files or pages within your MySource site by name or ID. This is particularly useful in large sites with several hundred pages.

Enter a query into either the *Pages* or *Files* fields and click the *Search* button. A list of matching files is displayed as shown in Figure 6-9 below:

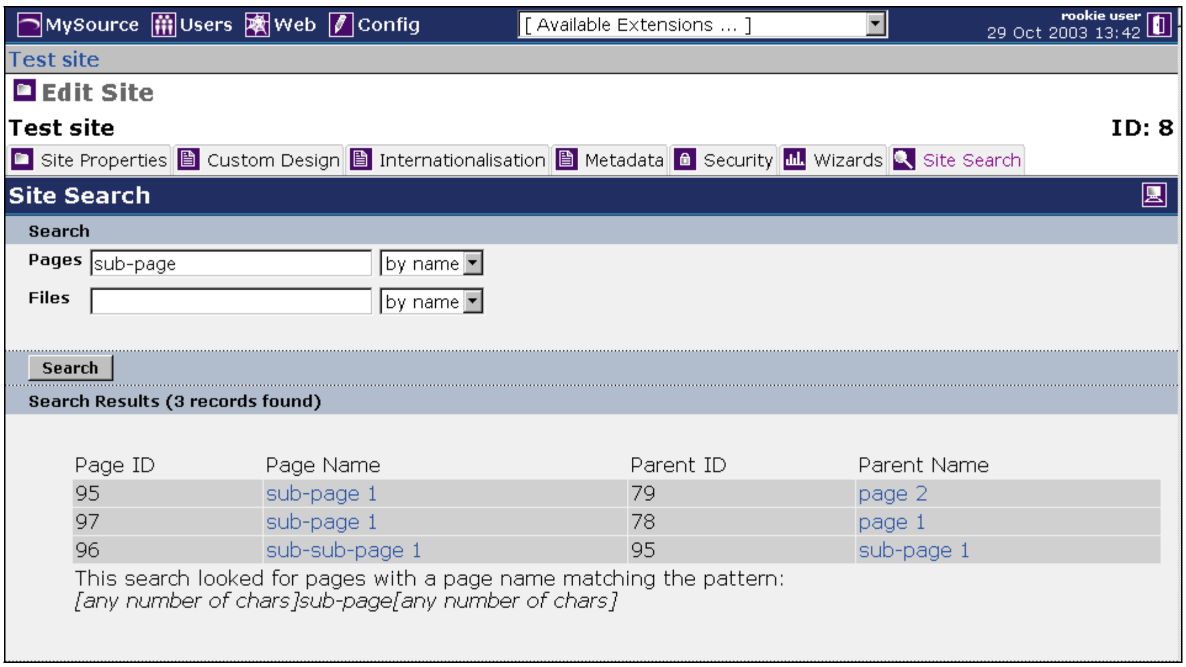


Figure 6-9 Site Search Tab

You can click on the page name to go to the *Edit Page* screen for that page, or click on the parent name to go to the *Edit Page* screen for the parent page.

Chapter 7 Edit Page

In this chapter we guide you through the ***Edit Page*** screen and in particular ***Page Properties*** tab. We also provide a brief description of the *Internationalisation*, *Metadata*, *Security* and *Wizard* tabs, highlighting how they relate to pages rather than to sites, as described in Chapter 6.

The *Content* and *Attachment* tabs are covered in detail later in Chapter 8 and Chapter 11 respectively.

The *Edit Page* screen is displayed both when you:

- Create a new page, or
- Click on the name of a page in the Site Map, Search or other screens.

The *Edit Page* screen is shown Figure 7-1 below:

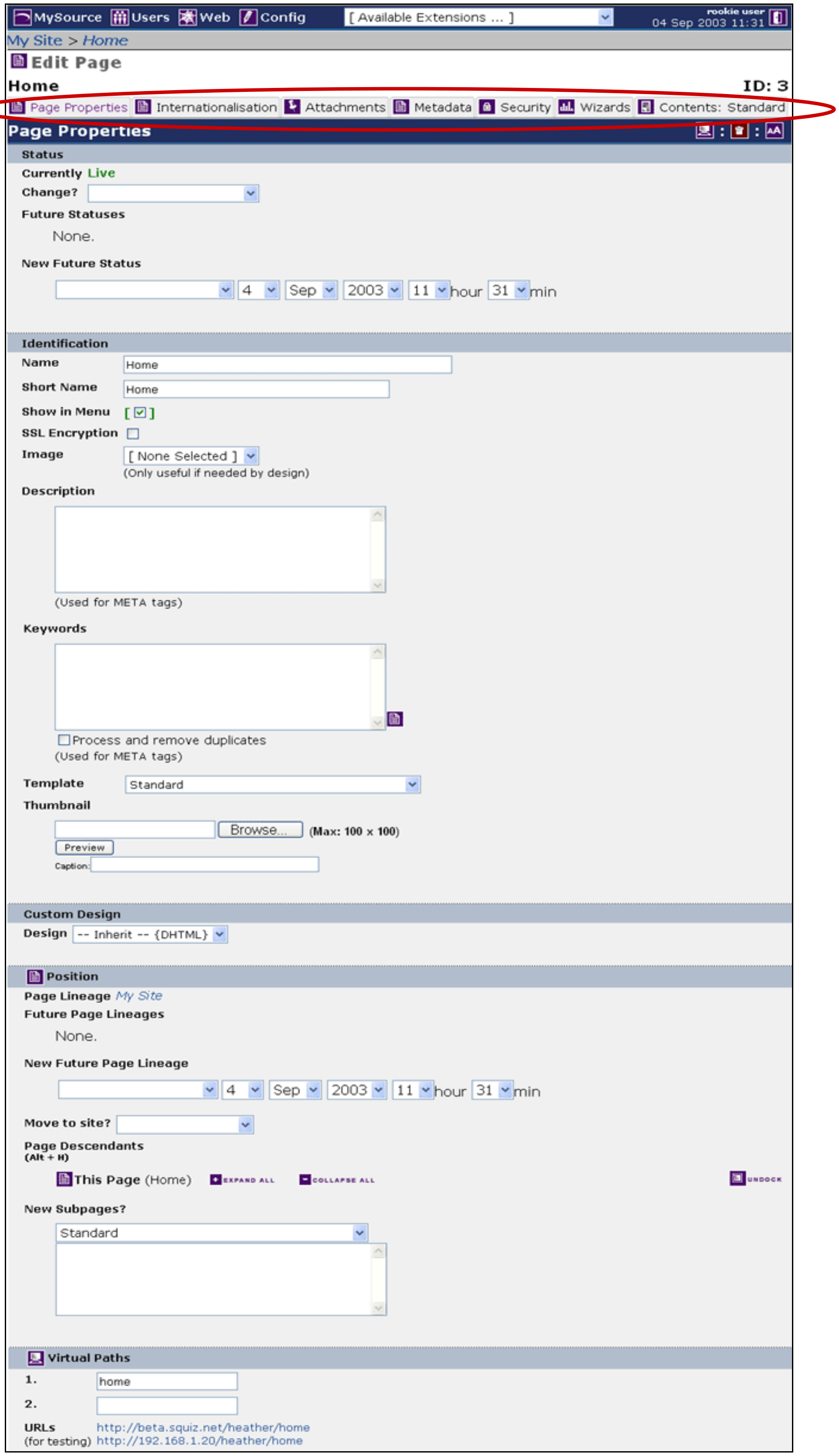


Figure 7-1 Edit Page Screen

As seen in Figure 7-1 above, the *Edit Page* screen has the following tabs:

- **Page Properties:** this is the default tab when you first enter the *Edit Page* screen. You set the name, template, status and other details for your page. You can also see the sub-pages of this page and its parent. This tab is described in more detail in the next section.

- **Internationalisation:** this tab allows you to activate a specific character set for your website (or a specific page of your site) so that you can add content in that language. No translation functionality is provided; it merely allows you to enter text in the appropriate character set (e.g. Chinese characters). This page was discussed in Chapter 6.

- **Attachments**: this tab allows you to view and edit the file attachments for this page. We will discuss this tab in detail in Chapter 11.

- **Metadata**: this tab allows you to create your own metadata definitions, or use a pre-existing template such as Dublin Core. Like MySource designs, metadata is an advanced topic in MySource, and we will not be discussing metadata any further in this document.

- **Security**: this tab allows you to set the access permissions for your site. It is discussed in more detail below.

- **Wizards**: this tab allows you to run useful reports and tools that apply to this page. This is a subset of the reports and tools to those that can be run across the entire system found in the *Web System Wizards* tab, or for the site found in the *Site Wizards* tab.

- **Contents**: this tab allows you to enter the body copy for your page. We discuss this tab in detail in Chapter 8.

Page Properties

When you first enter the *Edit Page* screen, you are taken to the *Page Properties* tab. The *Edit Page* screen is very similar to the *Edit Site* screen that we discussed in Chapter 6

As you can see in Figure 7-1 above, the *Page Properties* tab has five main sections: ***Status**, **Identification**, **Custom Design**, **Position*** and ***Virtual Paths***.

Status

This section allows you to set the current and future status of a page. The status of a page determines the options available for editing that page.

Each possible page status in MySource is described below:

Under Construction (Blue)	When a page is created, it has a status of *Under Construction* by default. A page that is *Under Construction* cannot be seen by the web surfing public, and can only be seen by people who are logged into MySource. When *Site Admininistrators* preview *Under Construction* pages, the appear with double brackets around them to distinguish them from *Live* pages.
Live (Green)	A *Live* page can be viewed by anyone through a web browser, unless the page has been made private. In this case, it will only be visible to people with an appropriate login name and password – this will be described in more detail in Chapter 15 and Chapter 16. *Site* and *Page Administrators* can edit *Live* pages in MySource, and changes are visible in your site as soon as you have clicked *Commit*.
Safe Edit (Pink)	This status allows you to make changes to a live page of your site within MySource, without the changes being seen in your site until you are ready to approve them. It allows you to make changes to an existing site over a period of time, and only make the changes visible when you are ready.
Pending Approval (Purple)	A page that has a status of is pending approval from an Administrator.
Disable (Olive)	A page that has a status of *Disable* has been disabled and cannot be edited or previewed without changing its status to *Under*

Construction.

Archive (Grey) — A page that has a status of *Archive* has been archived and cannot be edited or previewed until its status is changed to *Restore and Keep Working* or *Restore and Make Live*.

TIP: The site map is colour-coded, the colour of each page indicating its status.

The fields in this section are as follows:

- **Currently**: the current status is shown at the top of this section.
- **Change?:** to change the current status of a page, select the desired page status from the drop-down box.
- **Future Statuses:** this section shows any scheduled new statuses**.**
- **New Future Status:** you can specify a future date and time for the status of a page to change. MySource will change the status of the page automatically when that time comes. An example of when this would be useful is changing the status of a page about a new product from Under Construction to Make Live, on the day of the product launch.

Identification

You name and describe your page in this section.

- **Name:** enter the name for your page in this text box. The title of the browser window will be the *Page Name* appended to the *Site Name* as, e.g. MySite - PageName.
- **Short Name:** enter the short name for your page. This is the name that will be shown in the navigation menu of the site.
- **Show in Menu:** tick this box for the page to appear in the site navigation menu. If it is not ticked, the page will not form part of the navigation and you should create a link to it from somewhere else in your site. All pages are created as menu items by default.

- **SSL Encryption:** SSL stands for Secure Socket Layer Encryption and relates to secure encryption of information e.g. credit card details. Selecting this function forces the page into SSL mode, which requires an SSL certificate to be installed.

- **Image:** this drop down list contains a list of all the images attached to the page. An image can be used as part of the navigation e.g. an icon next to the name of the page but the design must be coded to allow for this.

- **Description:** enter the description for your page into the textbox. Each page should have a meaningful description, which should consist of a one or two sentence summary of the contents of the page. The description is used in the <meta name="description"> tag that is used by search engines.

- **Keywords:** enter the keywords that best describe the contents of the page in this textbox. This are used for the <meta name="keywords"> tag. Both Search Engines and the MySource Site Search function search through these words to find your page.

TIP: After you have added content to a page, you can click on the *Extract Keywords* icon (tick the *Process and Remove Duplicates* box) and *Commit*. The keywords from the content of the page will be extracted into this text box.

- **Template:** all pages must use a template, which determines the behaviour of the page e.g. the *Standard* template allows you to load text and images, and the *Custom Form* template enables you to build online forms. The core MySource templates will be described in detail in Chapter 13.

- **Thumbnail:** this is only used by the *Sub-Page Listing* template – see Chapter 13 for more information on *Page Templates*.

Custom Design

- **Design**: select the design for your page from the drop down list.

  By default, a page will inherit the design of its parent page, or if it is a top-level page, it will inherit the design specified in the *Site Properties* page.

You only need to change the design for a page that will not follow this convention e.g. if there is a separate design for a products page.

Position

- **Page Lineage:** this shows you where the current page sits in the site hierarchy.

- **Future Page Lineages:** in a similar way to setting a future status, you can specify a future date and time for a page to move from one place in the site to another. An example might be a fact sheet page moving from a page called "Current" to a page called "Archive" from one week to the next.

  If a future page lineage has already been set, the date and time it has been set to change is shown, along with a tick box to delete the setting.

- **New Future Page Lineage:** select a page within your site from the drop down list to be the new parent, and set the date and time you would like the page to change lineage. Select *Commit*.

- **Page Descendents:** this section shows if the page has any sub-pages. A sub-set of the site map appears, and you can undock the site map from this screen by clicking on the *Undock* icon.

- **New Subpages:** this allows you to add sub-pages to the page you are currently editing, and works in exactly the same way as creating top level pages in the *Site Properties* tab of the *Edit Site* screen (which we practiced in Workshop 2 in Chapter 6).

  Enter the name of your new page in the text box and select the template you want to use for the page you are just about to create from the drop down list.

Virtual Paths

- **Text Box:** enter the URL for your page into the textbox.

  Each page in the site must have a virtual path, which is an extension to the site URL e.g. http://www.yoursite.com/yourpage.

When you create a new page, the virtual path field is automatically populated with the page name. When you duplicate a page, the virtual path will have a number extension e.g. yourpage2. You can then change the automatically generated virtual path if required.

Your MySource system should have virtual paths turned on by default, but if this is not the case (indicated by an extension e.g. http://www.yoursite.com/./?p=123 which is the PHP naming convention) a super user can turn them on in the *Config* tab.

TIP: There is an *Update Virtual Paths* wizard, which you can run at *Web System* level to replace the PHP naming convention with the name or short name of each page in the site.

- **URLs (for testing):** this section shows the full address of the page including the virtual path specified in the URLs component specified for the site in the *Site Properties* tab.

Security

The *Edit Page, Security* tab allows you to perform two main functions:

- Close-off public access to your site for the page you are editing, and grant access to a *Site* or *General Access Group*.

- Define *Page Administrators* and *Page Editors* for the page you are editing.

We will now go through the *Edit Page, Security* tab seen in Figure 7-2 below:

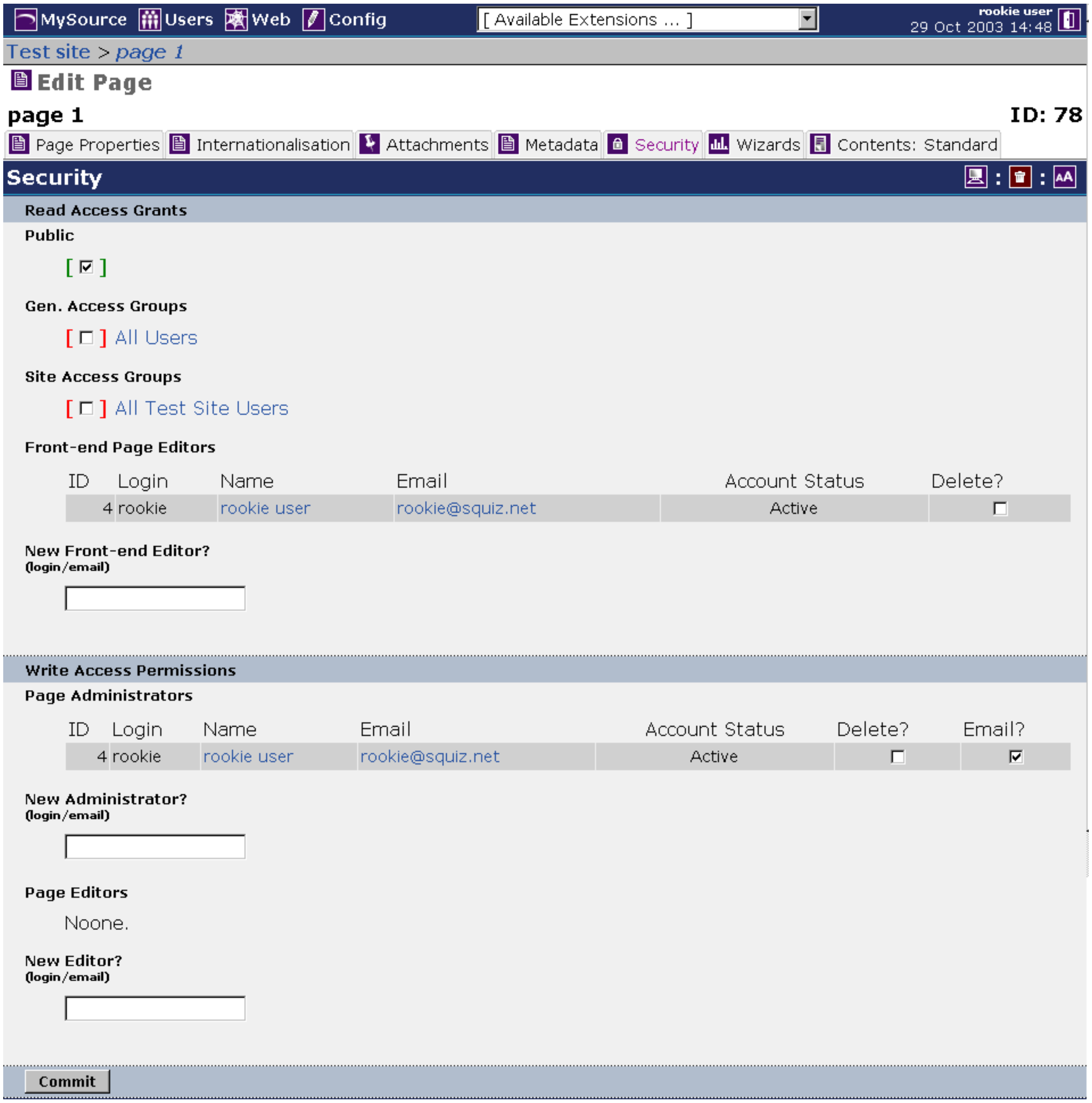


Figure 7-2 Edit Page Security tab

Read Access Grants

- **Public:** ticking this checkbox allows the web surfing public to see this page of your site. If this checkbox is not ticked, you should tick the checkbox of the *Access Group* or *Groups* to which you want to give access.

> **TIP: You can create a Member's Area by using this feature. See Chapter 16 and Workshop 23 for more details.**

- **Gen. Access Groups:** this section shows a list of *General Access Groups* in your MySource system. To give access to a *General Access Group,* select the checkbox.

- **Site Access Groups:** this section shows a list of *Site Access Groups* for the site that you are editing. To give access to a particular *Site Access Group***,** select the checkbox.

- **Front-end Page Editors:** if there are any existing *Front-end Page Editors*, they will be listed in a table in this section. A *Front-end Page Editor* can access any page, either as a user of the website or in the MySource System. However, they cannot alter the contents of any page.

  You can tick the *Delete* box to remove this user as a *Front-end Page Editor*.

- **New Front-end Editor?:** you can create a new *Front-end Page Editor*, by typing the login or email address of an existing MySource user.

Write Access Permissions

This section allows you to define *Page Administrators* and *Page Editors* for the page you are currently editing.

- **Page Administrators:** this section shows a list of all the *Page Administrators* for the page you are currently editing. For each *Page Administrator,* you can see the ID, login, Name, Email, and Account Status.

  You can click on the name of each *Page Administrator* to go to the Edit Users screen for this user. If an email address has been entered, you can click on it to email that person directly.

  You can tick the checkbox to remove use as a *Page Administrator*.

TIP: This does not delete the user's MySource account – you are merely demoting someone from being a *Page Administrator*

- **Email?:** this allows you to specify if the *Page Administrator* will be notified by email whenever a *Page Editor* changes the status of a page from *Under Construction* to *Apply for Approval*.

- **New Administrator?:** you can make an existing MySource user a new *Site Administrator* here. Type the login or email address of the MySource user that you want to make a *Page Administrator* for this page into the textbox.

- **Page Editors:** this section shows a list of all *Page Editors* for this page. It is the same as the *Page Administrator* list except for *the Email?* Function which is not provided for *Page Editors*.

- **New Editor?:** this section works in exactly the same way as the *New Admin?* section described above.

Wizards

These are useful reports and tools that apply to each individual page in your site. The *Edit Page Wizards* tab is shown in below:

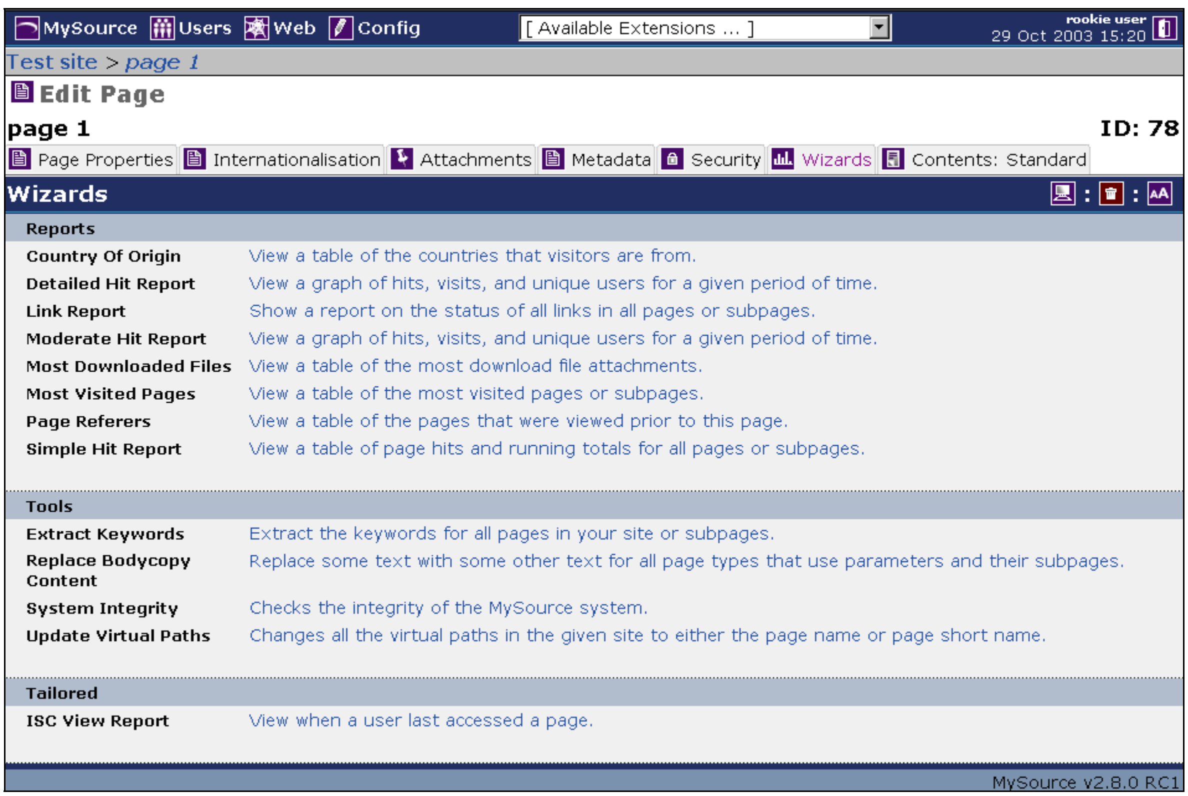


Figure 7-3 Edit Page, Wizards

To use the wizards, simply click on the description of the wizard you want to use and follow the prompts.

Chapter 8 Content

This chapter discusses the ***Edit Page***, ***Contents*** tab for a page created with the ***Standard*** page template - other page templates are covered in Chapter 13 and Chapter 14.

The *Contents* tab is where you enter the body of your page, and the workshops in this chapter teach you how to add text and images and how to upload a file, using the ***WYSIWYG*** (What You See Is What You Get) cell type - an interface that allows you to enter content in a similar way to a word processing program. You also practice copying and pasting text from another source into your page.

Contents: Standard Tab

The *Standard* template allows you to add a page with text and images, and edit or delete content.

When you first create a page using the standard template and click on the *Contents: Standard* tab you see the screen shown below:

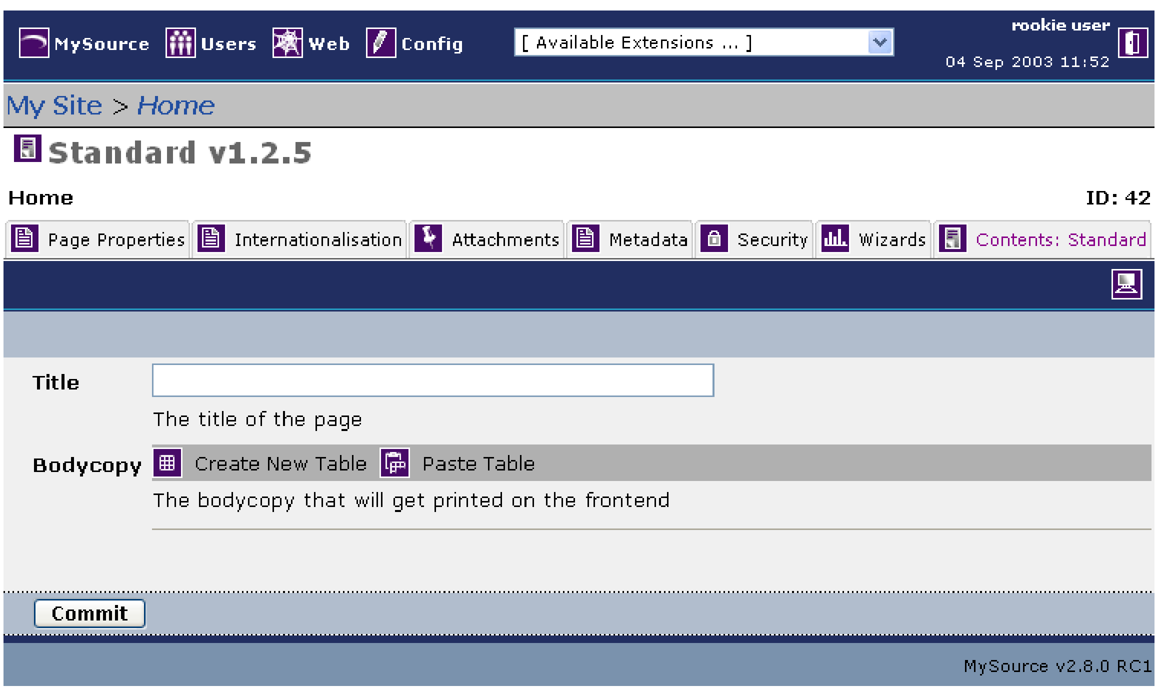


Figure 8-1 Contents: Standard Tab

- **Title:** this is where you enter the title of your page.

TIP: By default, this will not appear on your page within your site, but if you want the title of the page to be printed on each page as a heading, the design can be coded to do this.

- **Bodycopy:** this is the area where the content is added to your page. All content in MySource must be laid out using tables. The following workshop goes through the step-by-step process of creating a new table.

Workshop 5 Adding content to a page

This workshop takes you through adding basic content to a page.

Make sure you are looking at the *Edit Page*, *Contents: Standard* tab.

1. The first thing to do is create a new table.

2. Click the *Create New Table* icon to bring up the *Insert Table* pop up window as shown below:

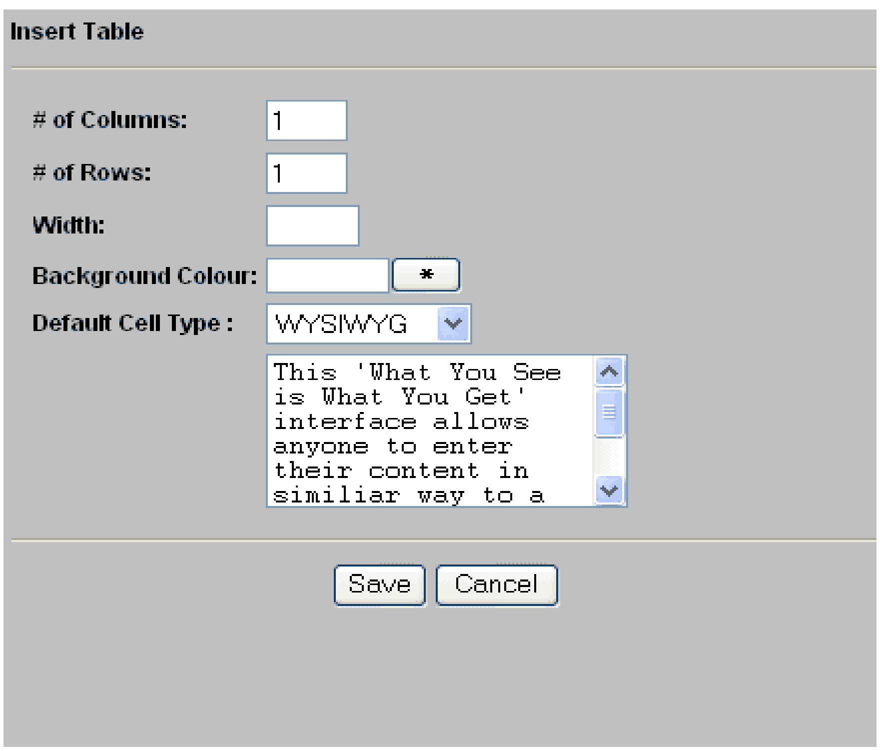


Figure 8-2 Insert Table pop up window

3. You can select the number of *Columns* and *Rows* you would like your table to have, depending on how you want to lay things out. For now, leave the number of *Columns* and *Rows* as "1".

4. Enter "100%" for the *Width*, so the page content will stretch to 100% of the browser window screen. (You must use the % sign or the system will interpret the measurement in pixels).

5. If you want to add a *Background Colour* you can either add the #(hex) value or click on the * and a colour picker window will pop up.

6. Leave the *Default Cell Type* as "WYSIWYG".

7. Click *Save*. The screen refreshes and shows your new table ready for content to be added, as shown below:

Figure 8-3 A MySource Table

TIP: Remember that if you hover your mouse over any of the icons, a tool tip will be displayed to tell you what will happen when you click on that particular icon.

8. Click on the *Edit Contents* icon on the right hand side of the screen, to bring up the *WYSIWYG* editor as in Figure 8-4 below:

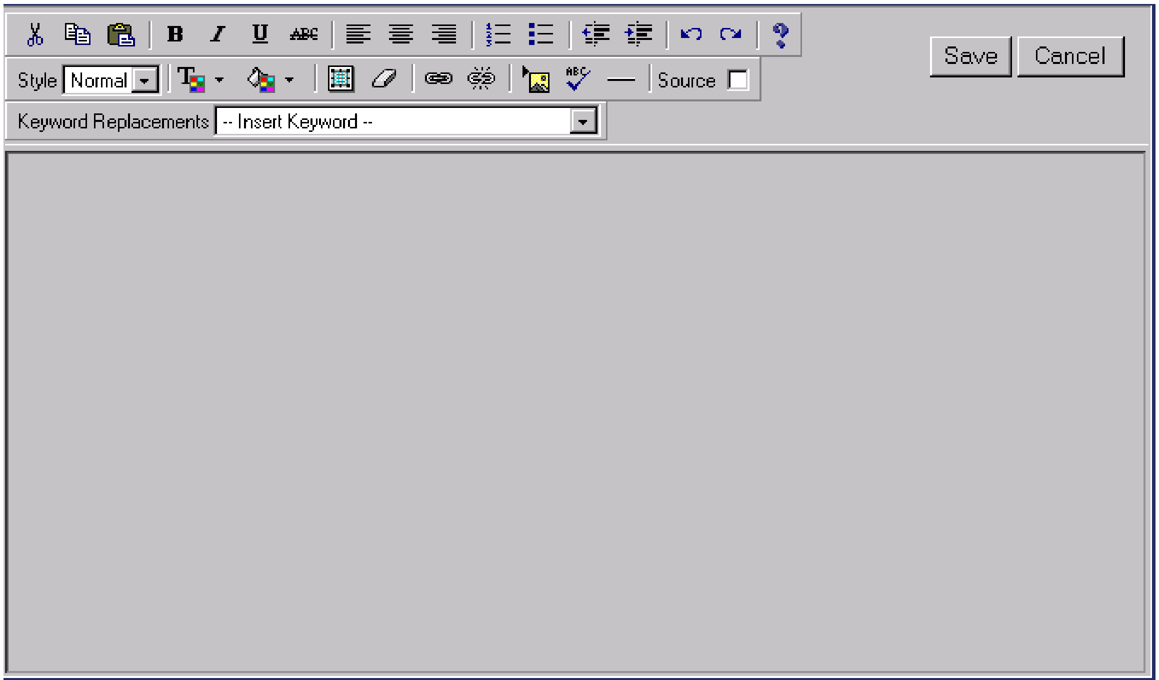


Figure 8-4 The WYSIWYG Editor

You will see there are icons for cut, copy, paste, bold, italics, underline, centre, numbered lists, bulleted lists, undo, redo etc similar to those you would find in a word processing program such as Microsoft Word.

9. Type in some text and click *Save*.

10. The bar above your table will turn blue shown below:

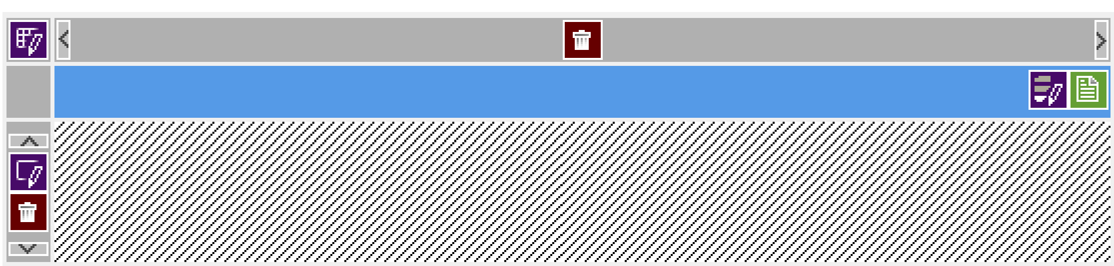


Figure 8-5 Blue bar indicates that your change has not yet been committed to the system

This indicates that you need to *Commit* the change. Click on *Commit* or *Alt+S*.

TIP: This is a new feature added in MySource version 2.8 which facilitates the editing of multiple tables in one go, rather than having to *Commit* multiple times.

11 The text in the table you created is now displayed, as shown below:

Figure 8-6 Table displaying content

12 Now click preview to see how this looks on your site.

Workshop 6 Copying and Pasting into the WYSIWYG Editor

This workshop takes you through the process of copying and pasting text from an existing website or document into your MySource site. This is very useful if you are migrating content from your old site into a new MySource site.

Make sure you are at *Edit Page Contents: Standard Tab*

1. Go through the same steps as Workshop 5 to create a new table and open the WYSIWYG editor.

2. Go to your existing site or document and select the text you want to copy.

TIP: Use the keyboard shortcut Control+C to copy the text.

3. Open *Notepad* (or an equivalent text editor) on you computer (click on Start, Programs, Accessories, Notepad) and paste the text into it. By doing this you will strip out any pre-formatted styles or code.

TIP: Use the PC keyboard shortcut Control+V to paste the text.

TIP: You should never copy and paste directly from a Word document or website into the WYSIWYG editor as any existing code e.g. links, images and formatting will conflict with the MySource code and style sheet.

4. Now copy the text again from Notepad and paste it into the *WYSIWYG* editor.

5. The stylesheet that is created as part of your site design will be applied to your text. You can then change the format of your text, selecting styles e.g. Headings, from the drop down list or applying bold or italics etc.

Workshop 7 Inserting Images

This workshop takes you through the process of inserting an image into your page using the *WYSIWYG* editor. Building on Workshop 6 we now add an image underneath the text.

Make sure you have an image ready to upload somewhere on your hard drive, or accessible through your LAN (Local Area Network). Images for the web need to be either jpeg or gif format.

You can either insert the image into the same table as the one you created to enter text, or create a new table underneath the existing one. In this example we insert the image into a new table underneath the existing table.

Make sure you are in *Edit Page, Contents: Standard Tab*.

1. In the *WYSIWYG* editor, move your cursor to where you want to insert the image and click on the *Insert Image* icon .

2. A window called *Insert Image* will pop up as in Figure 8-7 Insert Image window below:

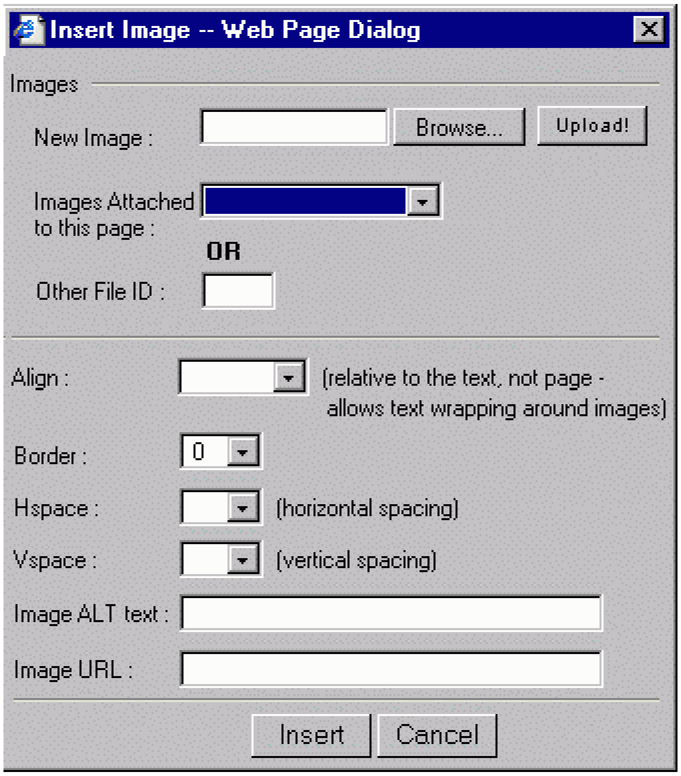


Figure 8-7 Insert Image window

3. Go to *New Image*: and click *Browse*, and a *Choose File* window will pop up.

4. Select the image and then click *Upload.* This will attach the image to the page you are on.

5. Wait until the image has finished uploading, and it reads "Upload Complete". The time to complete depends on the file size.

6. You now see the image in the drop down list *Images Attached to this page*.

7. You can choose to *Align* the image to the left or right of any text.

8. You can choose to put a *Border* around the image.

9. You can add some space around the image to pad it out from the text, using the *Hspace* and *Vspace* settings.

10. Enter a short description or just the name of the image into the *Image ALT Text* box.

> **TIP: Alt tags are used by search engines to read the image, and are displayed when you hover the mouse over the image.**

11. Now click *Insert* and the image is inserted into the WYSIWYG window.

12. Click *Save*, the blue bar shows on the table indicating you need to *Commit* to save the change.

13. The image then appears in the table on your page as shown in Figure 8-8 below.

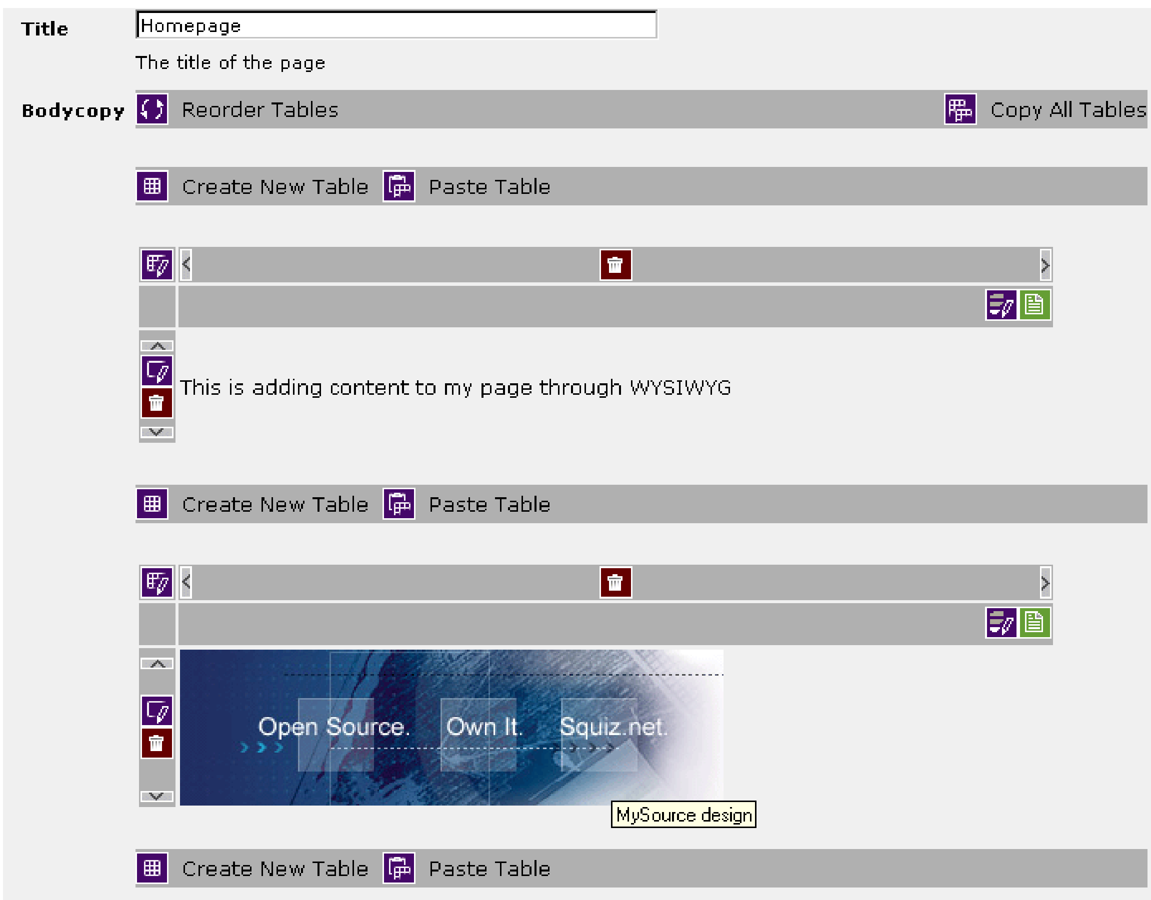


Figure 8-8 MySource tables with text and image

16. Now click preview to see how this looks in your site. In particular, roll your mouse over the image to see the *Alt* tag.

Workshop 8 Uploading/Attaching a File

This workshop takes you through the process of attaching a file to your page using the *WYSIWYG* editor.

Make sure you have a file ready to upload somewhere on your hard drive, or accessible through your LAN (Local Area Network).

Make sure you are in *Edit Page, Contents: Standard tab*.

1. In the WYSIWYG editor, type some text like "Here I am practicing attaching a file to a page", select the text and click on the *Insert Link* icon .

2. A window called *Insert URL* will pop up as in Figure 8-9 below:

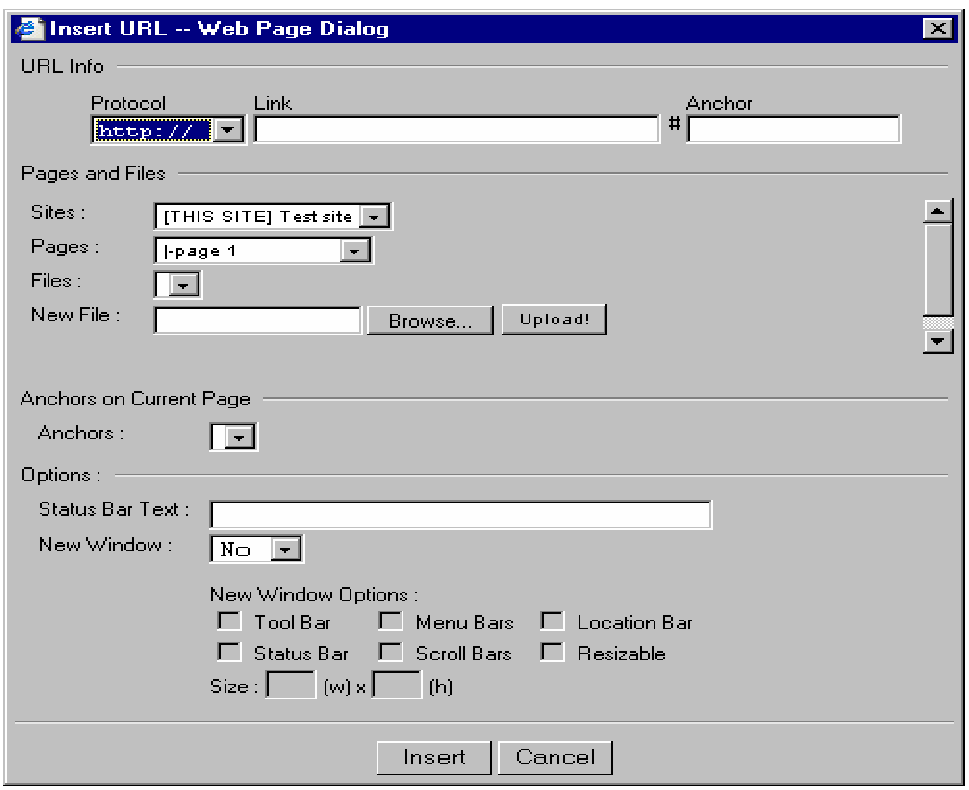


Figure 8-9 Insert URL window

We will go through the Insert URL window in detail in the next chapter – All About Links, but for now, we will just practice browsing to upload a new file.

3. In the *Pages and Files* section of the Insert URL window, click the *New File Browse* button to locate the file that you want to link to. Click the *Upload* button.

4. The file then appears in the *Files:* drop down list.

5. Select *Yes* in the *New Window* drop down list to display the document in a new window.

6. Click *Insert*, *Save*, and *Commit*.

7. Now click preview and check the link in your site.

♣ **You have now successfully completed Workshops 5-8** ♣

This leads us nicely onto Chapter 9, which is all about links. Here we learn more about the *Insert URL* properties and practice creating links within your pages. Later in Chapter 11, we learn more about *Attachments*.

Chapter 9 All About Links

This chapter takes you through all you need to know about ***Links***, from setting up a link to an external site, to creating links within a page. We take you through the *Insert URL* window in detail and end the chapter with workshops that give you an opportunity to put this into practice.

The different types of links we practice are as follows:

- External link (e.g. to an external website or email address)
- Internal link (to something within your MySource site) including:
  - To a file that is already attached to a MySource page
  - To a new file that you must first upload
  - To a specific place on a page within your MySource site (an anchor link)

To understand the different processes involved in creating each type of link, it is important that you understand all the options that appear in the *Insert URL* window as shown below:

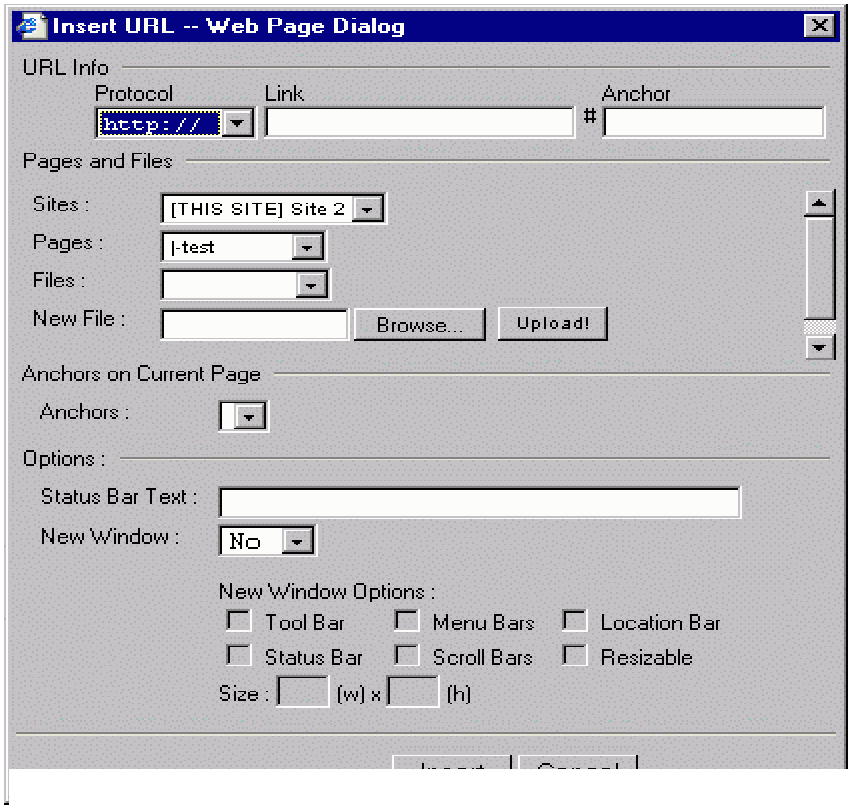


Figure 9-1 Insert URL window

URL Info

This section is used if you want to link to a destination external to your MySource site.

- **Protocol:** select the protocol from the following options:

http://	Used to create a link to a web page with a normal connection
https://	Used to create a link to a web page with a secure connection using SSL
ftp://	Used to create a link to an ftp server
mailto:	Used to create a link to an email address

- **Link:** this is where you enter the address of the link as appropriate for the protocol you select. E.g. if the protocol is http:// the link might be http://www.squiz.net. If the protocol you select is mailto: the link might be person@yoursite.com.

TIP: To set the subject line of your email for a *mailto:* protocol link, add "?subject=<subject text>" to the end of your email address.

An example is: squiz@squiz.net?subject=Sales Query

Your subject text may contain spaces and you do not need to surround the text by quotes.

(Please note however, if you are entering the subject text directly into the HTML, text after space characters in the string are ignored. You must instead use "%20%" for a space character.)

- **#Anchor:** an anchor is a link to a particular place within a page (e.g. a 'back to top' link). The anchor is marked with the <a name="name">. We practice creating an anchor link in Workshop 13 later in this chapter.

Pages and Files

This section is used to create a link to any site, page or file within your MySource system.

- **Site**: use the drop down list to select the site. If you want to insert a link to a site, leave the blank item selected in the Pages drop down list, and select *Insert*. If you want to link to a particular page within this site, go to the *Pages* drop down list and select the appropriate page.

- **Pages:** a list of pages within the selected site is made available in this drop down list. However, when you first select a site, the blank page item is selected to indicate that you want to link to the default index page of this site. You can select a particular page to which to link and select *Insert*.

- **Files:** if you have selected a page in the *Pages* drop down list, a list of files within the selected page are made available in this drop down list. However, when you first select a page, the blank file item is selected to indicate that you want to link only to the page. You can select a particular file to which to link and select *Insert*.

- **New File**: this field appears if you have the current *Site* and *Page* selected, allowing you to upload a file to this page. Select *Browse* to the find the new file, and select *Upload*. The file is now available on the *Files* drop down list.

Anchors on Current Page

You can also link to any anchor that exists on the current page.

- **Anchors**: select the anchor to which to link from this drop down list.

Workshop 13 takes you through adding an anchor and linking to it.

Options

- **Status Bar Text:** this is text that appears in the grey bar in the bottom left hand corner of the browser when you hover your mouse over the link.

- **New Window:** if you select this option your link opens in a new browser window. For a new window, you can choose whether or not to show the tool bar, menu bars, location bar, status bar or scroll bars and whether the window is resizable or not. You can determine the exact size (height and width in pixels) of the new browser window.

TIP: It is good practice to open your file in a new window rather than in the same browser window as the one displaying the web page. This allows users to resize and in particular print the document separately.

Workshop 9 Linking to an Internal Page

This workshop takes you through linking a page to another page within your site.

Make sure you are on the *Contents: Standard* tab of the *Edit Page* screen.

1 In your test page, click on the *Edit Contents* icon to bring up the *WYSIWYG* editor.

2 Type in the text "This is a link to another page in my site" and then select the text and click the *Insert Link* icon .

3 This will bring up the *Insert URL* window as detailed in Figure 8-1.

4 Make sure the *Sites* drop down list is on "[THIS SITE]".

5 Select a page within your site that you want link from the *Pages* drop down list.

6 Click *Insert* - the sentence is now a link (hover your mouse over it to check the URL of the link).

7 Click *Save* and *Commit.*

8 Click *Preview* to see your page and test the link.

TIP: If you have more than one site in your MySource system, you can create an internal link to any page in any of the sites within your system.

Workshop 10 Linking to an External Site

This workshop takes you through linking to an external site.

You can link to the home page of any external website, or to a specific page within that website by using the full URL of that page. Let's use the Squiz site as an example and practice linking to the News page.

1. In your test page, click on the *Edit Contents* icon to bring up the WYSIWYG editor.
2. Type in the text "This is a link to a external website" and then select the text and click the *Insert Link* icon .
3. This will bring up the *Insert URL* window as detailed above.
4. In the URL Info, set the *Protocol* to http://
5. In the *Link* textbox type in www.squiz.net/news

6. Select Yes for a *New Window* and tick all the checkboxes.

7. Click *Insert* – The sentence is now a link (hover your mouse over it to see the URL).

8. Click *Save* and *Commit*.

9. Click *Preview* to see your page and test the link.

Workshop 11 Linking to a File that you Upload

This workshop takes you through linking to a new file that must be uploaded to the MySource system.

For this workshop, you will need to have a .doc or .pdf file available on your hard-drive or accessible on your LAN (Local Area Network).

1. In your test page, click on the *Edit Contents* icon to bring up the *WYSIWYG* editor.

2. Type in the text "This is a link to download a file that I am going to firstly upload" and then select the text and click the *Insert Link* icon .

3. This will bring up the *Insert URL* window as detailed above.

4. Ensure this site is selected in the *Sites*: drop down list and your homepage is selected in the *Pages*: drop down list.

5. Next to *New File*, click the *Browse* button to find the file that you are going to link to and click the *Upload* button. This will attach the file to this page.

6. Click *Insert* - The sentence will now be a link (hover your mouse over it to see the URL).

6. Click *Save* and *Commit.*

7. Click *Preview* to see your page and test the link.

Workshop 12 Linking to a File that is already attached to another MySource page

This workshop takes you through linking to a file that is already attached to another page.

Now that you have a page that has a file attached to it, (referred to here as "attachment_one"), we will practice linking to that file from another page. If you created more than one test page in Workshop 2 , click on the *Contents* tab of one of those pages now. If not, create a "test page 2" now and click on the *Contents* tab.

1. In your second test page, click on the *Edit Contents* icon to bring up the *WYSIWYG* editor.
2. Type in the text "This is a link to download a file attached to test page one" and then select the text and click the *Insert Link* icon .
3. This will bring up the *Insert URL* window as detailed above.
4. Under the *Pages* and *Files* headings, find "test page one" in the *Pages* drop down list.
5. Under the *Files* drop down list, you will see a list of files that are attached to test page one. Choose the "attachment_one" (or the name of the file you uploaded).
6. Click *Insert* - the sentence will now be a link (hover your mouse over it to see the URL).
7. Click *Save* and *Commit*, and then preview to see your page and test the link.

TIP: This is useful if you have many references throughout your site to one particular file – it saves you having to attach that file to every page.

Workshop 13 Setting up Anchor Links

In this workshop we will practice creating a “Back to Top” anchor link. Anchor links are very useful for getting to a particular section on a page quickly without having to scroll to find it.

Firstly you need to create the anchor itself:

1. In the *WYSIWYG* editor, type “#top#” (you can name it anything you like but each anchor has to have a unique name) and some text next to the anchor like “this is an anchor at the top of this page”.

TIP: The hash keys ensure the anchor doesn’t appear on your page in the browser and it doesn’t appear in MySource either unless you view it in the *WYSIWYG* editor.

2. Click *Save*, then *Commit*. You won’t be able to see #anchor# in your table, but it is now be available in the *Anchors on Current Page* drop down list, in the *Insert URL* screen.

Now make a link to your anchor:

3. Again in the WYSIWYG editor, click on *Enter* a few times to take you quite far down the page and then enter some text that says “Back to Top”.

4. Highlight the text and click on the *Insert Link* icon .

5. From the *Anchors on Current Page* drop down list, select ‘”Top”.

6. Click *Insert*, *Save* and *Commit.*

7. Click *Preview* to view your page and test the link.

8. Practice this in reverse by creating another anchor called “bottom#” at the bottom of the page and a text link at the top of the page that says “This is a link to a very important place further down this page!!”.

Workshop 14 Inserting a Link to an Email Address

This workshop takes you through creating a link to an email address using the mailto: protocol, which will open the user's email program and create a new email addressed to the email address specified.

1. In the *WYSIWYG* editor, type some text next like "email to someone", and click on the *Insert Link* icon .
2. Select the mailto: protocol and enter an email address into the Link textbox e.g. person@yoursite.com
3. Click *Insert*, *Save*, and *Commit*.
4. Click *Preview* to view your page and test the link.

Workshop 15 Removing and Editing a Link

To remove a link:

1. In the *WYSIWYG* editor, highlight the text or image that you wish to unlink in the WYSIWYG editor and click on the 'remove link' icon.

   This will only delete the link - not the text, nor the linked image itself. A text link will be converted back to its original style.

5. Click *Insert*, *Save*, *Commit*.
6. Click *Preview* to view your page and test the changes.

♣ **You have now successfully completed Workshops 9-15** ♣

Chapter 10 More on Tables and Formatting

This chapter provides more detail about how you can edit the properties of tables in MySource, to format content and control the layout of pages.

In the first workshop of Chapter 6, we created a simple table with one column and one row for the purpose of adding some text to a page. You can add columns or rows to tables at any time, and edit the properties of the table as a whole or of each individual cell to format the content on your pages.

In this chapter, we will look firstly at the ***Edit Table Properties*** window before moving on to editing individual cells and the ***Edit Cell Properties*** window.

Edit Table Properties

The *Edit Table Properties* window is displayed when the *Edit Table Properties* icon at the top left hand side of the table is clicked as highlighted in Figure 10-1 below:

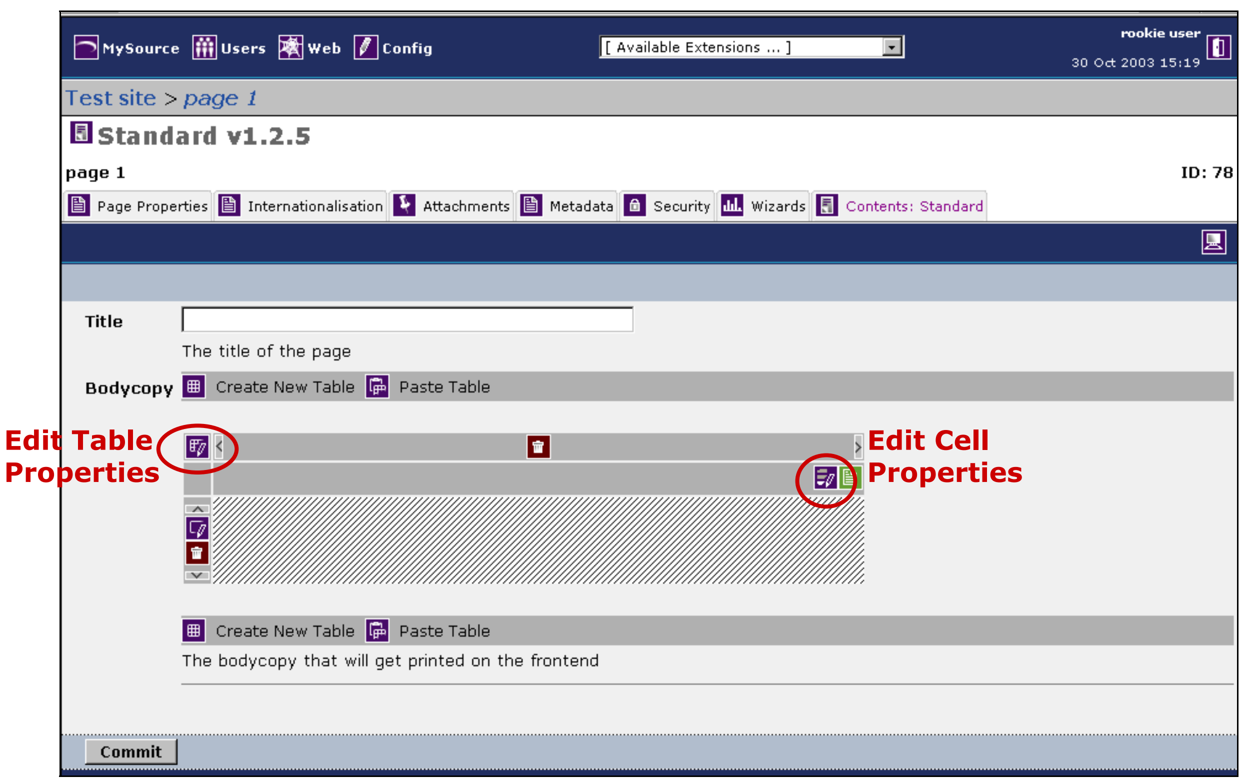


Figure 10-1 Selecting the Edit Table Properties Icon

The *Edit Table Properties* window is shown below:

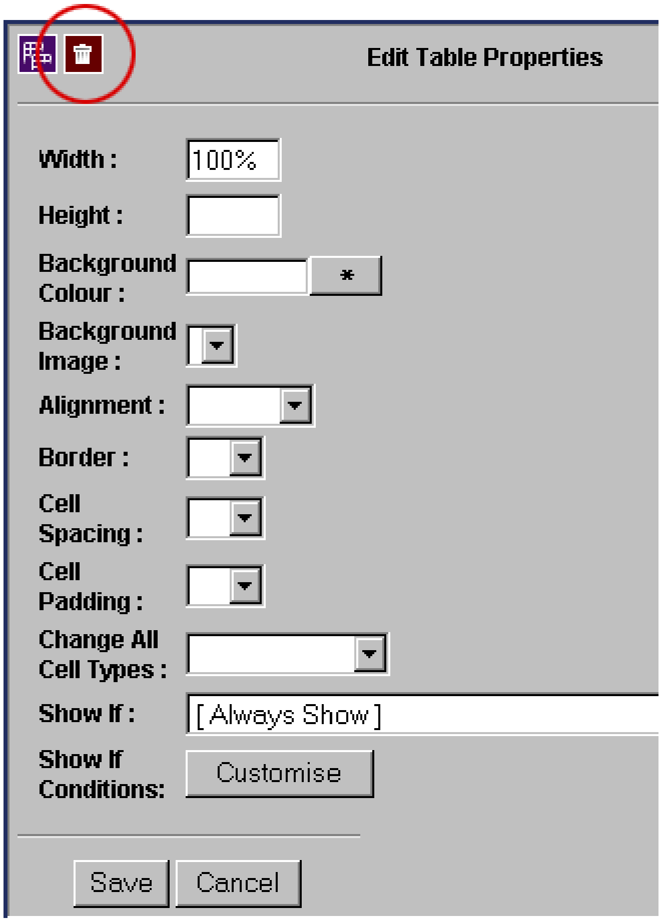


Figure 10-2 Edit Table Properties

- **Width:** this attribute defines how wide the table is on the page. You can enter a value that is either the exact width of the table (in pixels), or a percentage of the current screen width.

> **TIP: If you enter a percentage of the current screen width, the width of the table will change if the window is resized.**

- **Height:** enter the height of the table in pixels or as a percentage of the current screen height.

- **Background Colour:** select a background colour to apply to the whole table. Click on the star to bring up the colour picker.

- **Background Image:** select an image to use as the background for the table. An image must first be attached to this page to allow you to select it from the dropdown.

- **Alignment:** select from Left, Centre or Right to align your table on the page, if its width is less than 100%. By default, tables and cells are aligned to the left.

- **Border**: this attribute indicates the width of the table border in pixels. You can set the value to 0 to display the table with no border.

TIP: If no border setting is entered, newer browsers will display a one-pixel border by default.

- **Cell Spacing** – this attribute defines the amount of space between the cells in the table. Enter a pixel value for the desired amount of cell spacing.

- **Cell Padding:** this attribute defines the amount of space between the edges of the cells and the contents of the cell. Enter a pixel value for the desired amount of cell padding.

- **Change All Cell Types:** this attribute defines the default cell type for all cells within the table.

- **Show if Conditions**: these conditions dictate the pre-requisites for the table to be displayed on the page.

  By default, this is set to *Always Show*, which means the table appears on your page. The other conditions in the drop down list are:

  - *Access Groups:* if you click the *Customise* button, you can choose from a list of *Access Groups*, to specify that the table only appears on your page if the user is logged in, and is a member of this Access Group.

  - *Logged In*: the table will only appear on your page if a user is logged-in to your site.

  - *Page Admin:* the table will only appear on your page if a user is an administrator for this page.

- *Page Write Access:* the table will only appear on your page if a user is an administrator or editor for this page.

- *Show if special user data: y*ou can set up additional data fields to be entered for your users in the *Special User Data* tab of the *Users* area. If this option is selected, you can specify criteria for displaying the page, based on the special user data of the current user.

  Click the *Customise* button, and select the organisation for which you will specify the special user data conditions. Firstly, the user must be affiliated with this organisation for the table to be displayed.

  A list of any special user data fields of type *Drop Down/List Box* or *Tickbox List* will be shown, along with the allowed values. You can then select "And" from the drop down list and check the values that must all be checked for the user, in order for the table to be displayed. You can also select "Or" and the check the values, any one of which must be checked for the user, in order for the table to be displayed.

- *Site Admin:* the table will only appear on your page if a user is an administrator for this site.

- *Site Write Access:* the table will only appear on your page if a user is an administrator or editor for this site.

TIP: Other options specific to the modules you have loaded in your system may appear in the drop down list.

- **Show if Conditions:** these are the conditions that apply to the *Show If* type selected. They apply to the *Show If* types: *Access Groups* and *Show if special user data*.

Deleting a Table

To delete a table, click on the *Edit Table Properties* icon of that table and in the *Edit Table Properties* window, click on the *Delete* icon as shown in Figure 10-2 above.

Duplicating a Table

To duplicate a table, click on the *Edit Table Properties* icon of that table and in the *Edit Table Properties* window, click on the *Duplicate* icon as shown in Figure 10-2 above. Then go to the page that you want to paste the table and click on the paste table icon. We will practice this in Workshop 17 later in this chapter.

Edit Cell Properties

To display the *Edit Cell Properties* screen click on the *Edit Cell Properties* icon at the top right hand side of the cell in your table, as highlighted in Figure 10-2 above.

The *Edit Table Cell Properties* window is shown below:

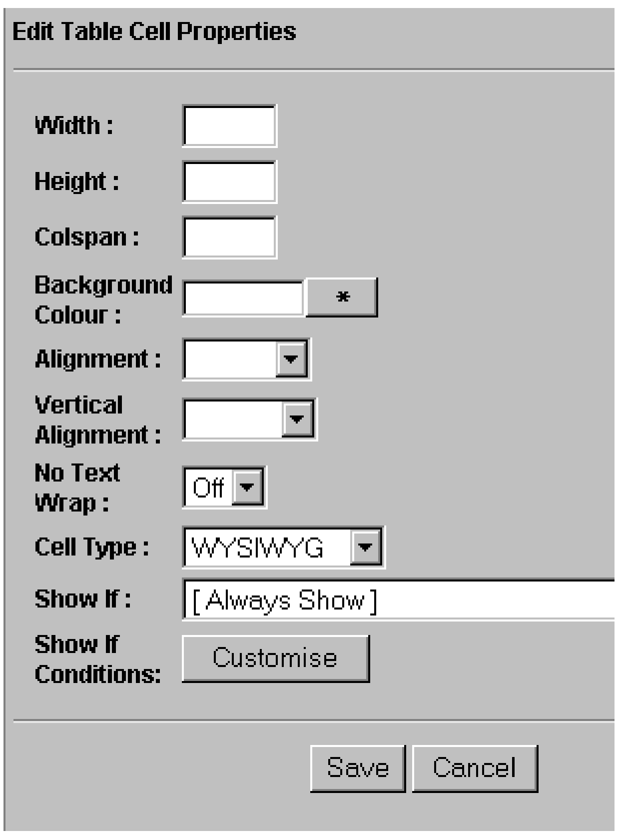


Figure 10-3 Edit Cell Properties

The fields on the *Edit Table Cell Properties* window are very similar to those on the *Edit Table Properties* window, but they are applied to this particular cell rather than the table as a whole.

- **Width:** as with table width, cells can be an exact pixel width or a percentage. However for cells, if a percentage is entered, it specifies the percentage of the full table width. Setting the width for a cell is useful when you want to have multiple columns of identical widths.

TIP: As with table widths, using percentages rather than specific pixel widths is a better idea because it allows your table to be displayed regardless of the window size (screen resolution).

- **Height:** this attribute defines the height of the cell in pixels or as a percentage of the table height. Again, column heights are useful when you want to have multiple rows of identical heights regardless of their contents.

- **Colspan:** this attribute is used to create cells that span multiple columns within the table. This is similar to merging cells in either Microsoft Excel or Word.

  Select the number of columns you want the cell to span from the drop down list. The data within that cell then fills the width of the combined cells.

TIP: Cells always span to the right, so the Colspan has to be applied to the leftmost cell in the span.

We will experiment with this in Workshop 16 later in this chapter.

- **Background Colour:** select a background colour to apply to the individual cell. Click on the star to bring up the colour picker.

- **Alignment:** this attribute relates to the horizontal alignment and defines whether the data in the cell is aligned with the left cell margin (*Left*), the right cell margin (*Right*), or centered within the two (*Centre*).

- **Vertical Alignment:** this attribute defines the vertical alignment of the data within the cell, meaning whether the data is aligned with the top of the cell (*Top*), with the bottom of the cell (*Bottom*), or vertically centered within the cell (*Middle*). We will experiment with this in Workshop 16 later in this chapter.

> **TIP: By default, cells are centered vertically, so you may have to reset the vertical alignment of cells to *Top* if you have one cell that contains more content than another but you want them both to align to the top.**

- **No Text Wrap**: this attribute defines whether the text inside a cell stays on one line and or wraps onto more than one line. This can be particularly useful for things such as form elements within table cells where you want the label and the input field to stay together.

- **Cell Type**: set the cell type of an individual cell using this drop down list. (Cell Types are covered in detail in Chapter 12).

- **Show If and Show If Conditions** – these conditions have already been covered above in *Edit Table Properties* section above. Set the value here for individual cells rather than to the table as a whole.

We will now experiment with the *Colspan*, *Vertical Alignment* and *Width* properties in the following workshop to create a table like the one in Figure 10-4 below.

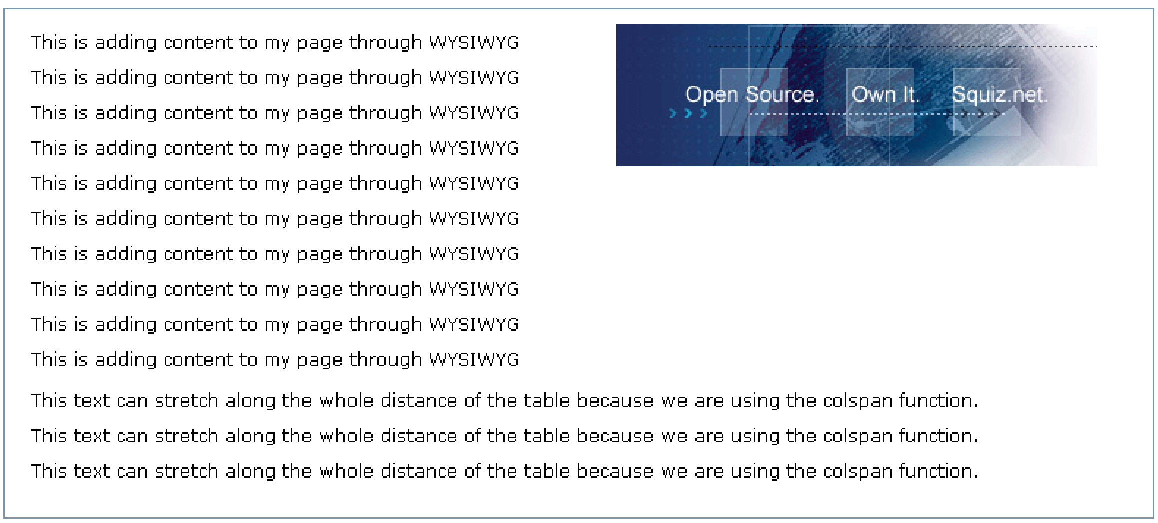


Figure 10-4 Formatting Tables

Workshop 16 Formatting Tables

1. For the purposes of this exercise, create a new table with 2 columns and 1 row in your test page, again using the default *WYSIWYG* cell type.

2. Enter some text into the first cell and copy and paste it on about 10 lines as in the example below.

	TIP: You can either use soft returns by using *Shift+Enter* or hard returns using only the *Enter* key.

3. Next, insert a small image into the column on the right.

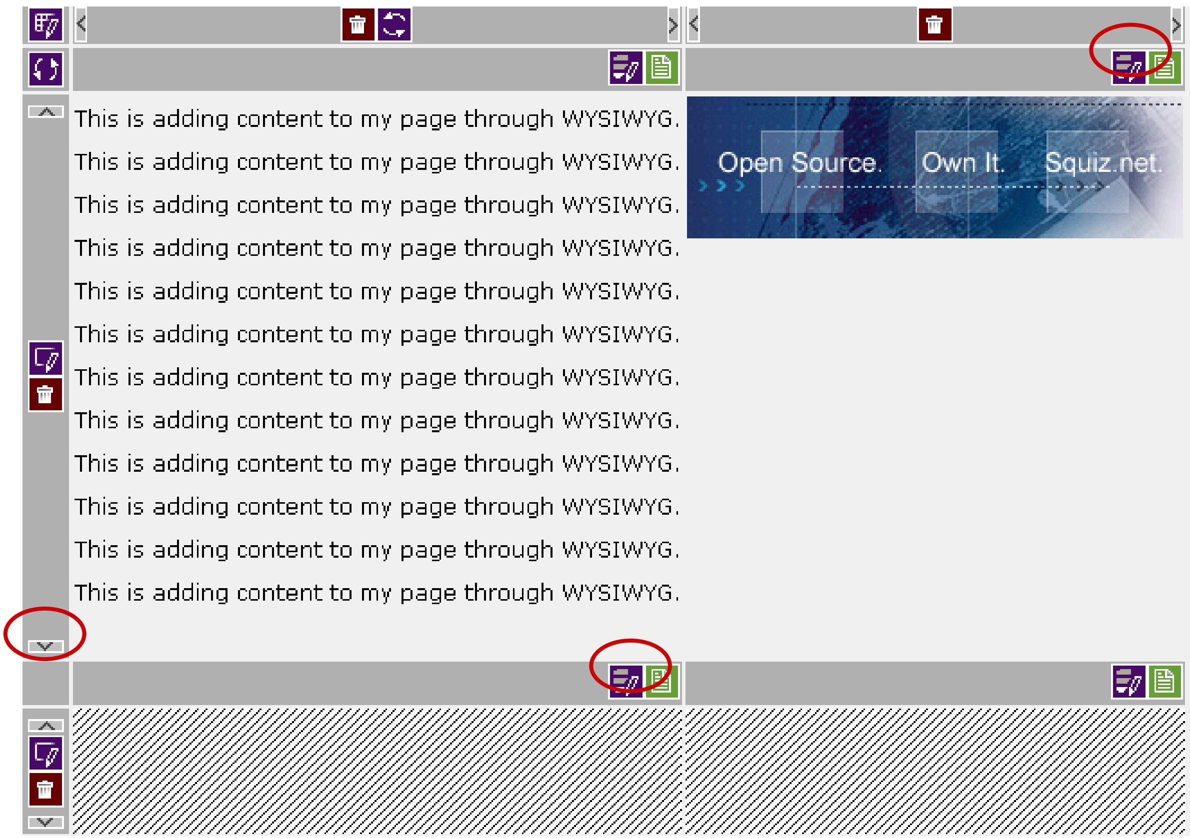


Figure 10-5 Formatting Tables

4. To align the image to the top of the text, click *Edit Cell Properties* for the Cell containing the image, as shown in Figure 10-5 above. Select *Top* from the *Vertical Alignment* drop down list.

5. Click *Save* and *Commit*.

For the second part of this exercise, we will insert a new row, which has one cell spanning the two columns above it:

6. Click the grey downward arrow, as shown in Figure 10-5 above. The new row has 2 columns.

7. Click on the *Edit Cell Properties* icon in the first cell in the second row to bring up the *Edit Cell Properties* window.

8. In the *Colspan* textbox, type in 2 to span the cell across 2 columns.

9. Click *Save* and *Commit*.

10. The page will refresh and you will see that the two cells have now merged into one, to span the width of the two columns in the top row as shown in Figure 10-6 Merged Cell below:

11. You can now add more text in this one merged cell.

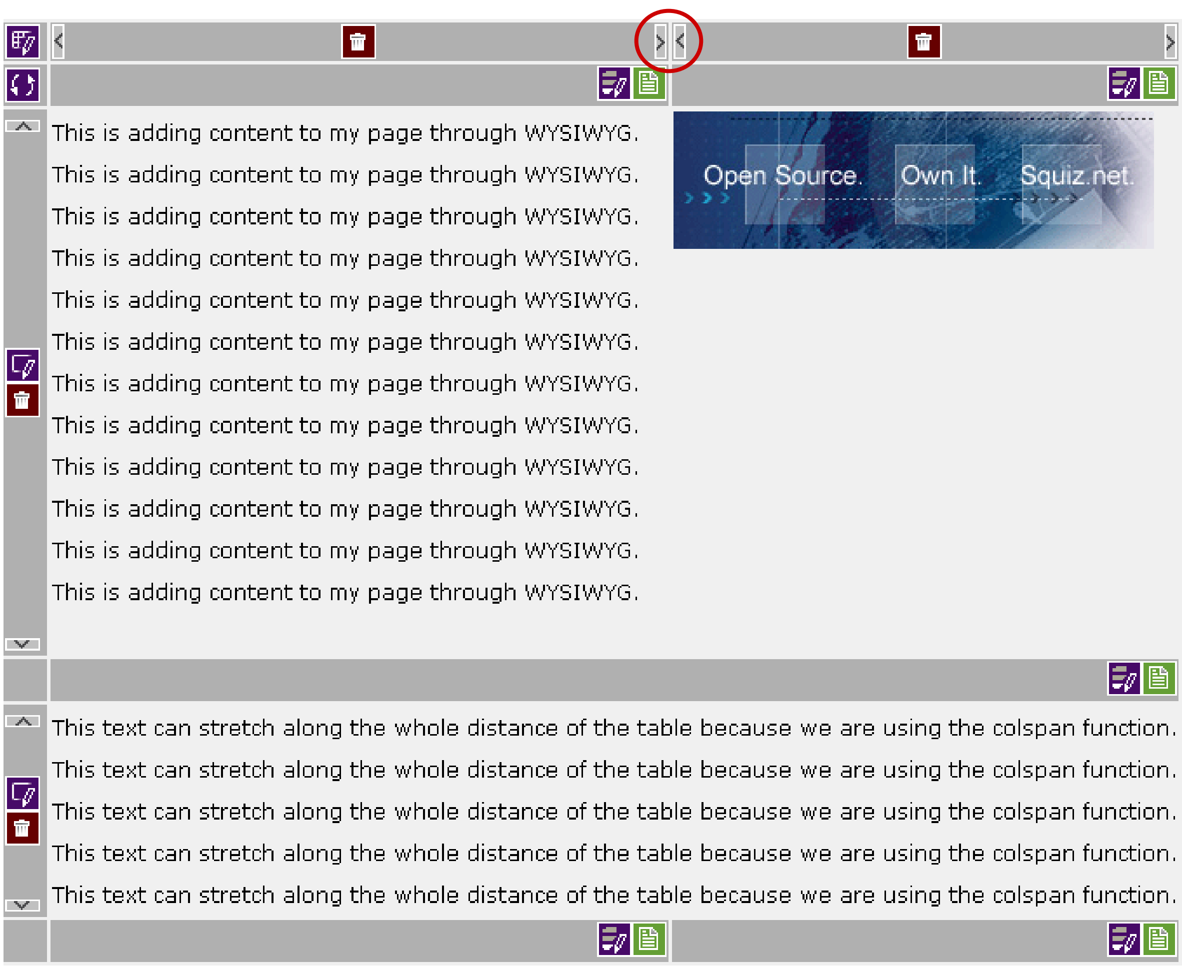


Figure 10-6 Merged Cell

The image in the second cell in the top row is aligned to the edge of the text in the first cell. For the last part of this exercise, we will create a space between them, as in Figure 10-7 Inserted Column below:

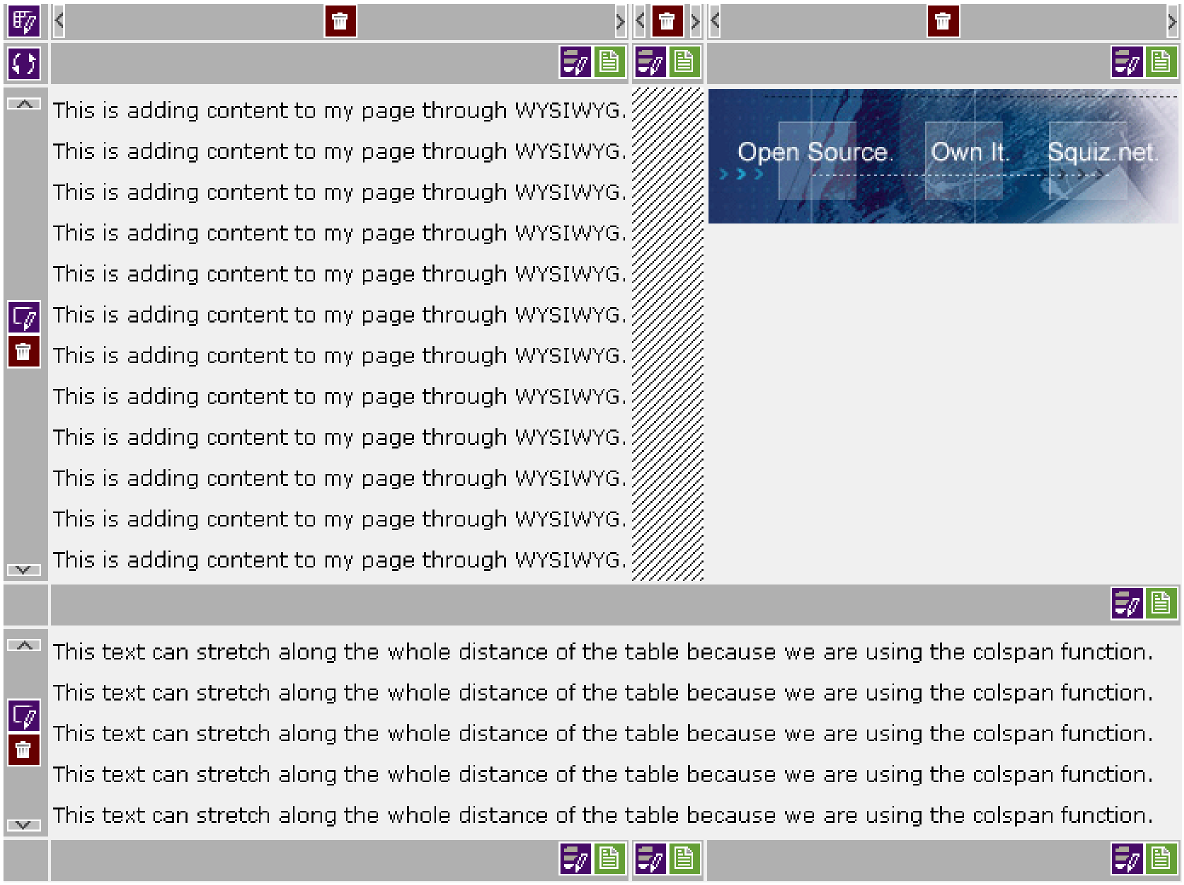


Figure 10-7 Inserted Column

12. Insert a new column by clicking the grey sideways arrow between the image and text cells as highlighted in Figure 10-6 Merged Cell above.

13. Once the new column has been created, click on *Edit Cell Properties* in the new cell.

14. In the *Width* box type 10 (remember measurements are interpreted as pixels by default unless you stipulate percentage by adding the % sign).

15. In the *Contents* tab, enter a space or insert a blank image (a transparent gif file).

TIP: If you have a cell with only a space in it, the browser will register this in character width. A better alternative is to insert a transparent image.

16. Click *Save* and *Commit*.

17. Click *Preview* to see the changes to your page and experiment by changing the width to your preference.

TIP: You can also amend the cell spacing and cell padding by manipulating these settings in the Edit Cell or Edit Table Properties.

TIP: This is a very easy table. If you would like to now try something more complicated, there is a workshop at the end of the Chapter 14 – Custom Form that takes you through building a table using more complex formatting.

Workshop 17 Copying and Pasting a Table

Now that you have a formatted table with content, we will now practice copying and pasting that table so that you don't have to create it again from scratch – this is very useful for setting up 'template' style pages in your site e.g. a media release page or a products page where you want each page to follow a consistent format.

1. Click on the *Edit Table Properties* icon of the table that you want to copy.
2. In the *Edit Table Properties* window, click on the *Duplicate* icon in the top left hand corner.
3. The page refreshes and the *Edit Table Properties* window closes.
4. Next go to the page where you would like to paste the table.

TIP: You can copy and paste tables between any page or site within one MySource system.

5. Click on the paste icon within your chosen page.

6. The page refreshes and your table is pasted on that page. You can now edit over the contents of the table as required.

TIP: If you have more than one formatted table and you want to copy all of them into a new page that is easy too! Simply click the *Copy All Tables* icon (at the top right hand side of the screen) and then click on *Paste Table* in the new page.

7. You can also reorder the tables within a page, click on the *Reorder Tables* icon which brings up the *Reorder* window table and move it up or down, by clicking on the arrows.

8. Click *Save* and *Commit*.

9. Click *Preview* to view the changes to your page.

♣ You have now successfully completed Workshops 16-17 ♣

Chapter 11 Attachments

This chapter is all about the ***Edit Page, Attachments*** tab and the ***Edit File*** screen. It is important that you understand how file attachments work in MySource so that you can easily maintain them.

In Chapter 8 Content, we looked at ways of uploading images and files through the WYSIWYG editor, so that they can be inserted on a page. The *Attachments* tab of the *Edit Page* screen allows you to view and maintain all file attachments that have been uploaded to a particular page.

More About Loading and Linking to Files

When you upload an image or file using the WYSIWYG editor, the file is added to the *File List* in the *Attachments* tab and given a unique File ID.

If you then insert a link to that file using the WYSIWYG editor, you are in fact creating a *reference* to that file on the page.

TIP: Only files loaded to the page you are currently editing are shown on the *Attachments* tab for that page. A page may reference a file loaded to another page within MySource, and such a referenced file is not listed in the *Attachments* tab for this page.

When you delete an image or remove a link to a file in the WYSIWYG editor, you are actually removing the *reference* to the image or file. The image or file is still listed in the *Attachments* tab, because it is still loaded to the page.

However, if you delete a file through the *Attachments* tab, you are removing the file itself from the MySource system, and it no longer appears listed on the *Attachments* tab. Any references to the file in the *Contents* tab of any other page will show a broken link or image on the page. If you remove a file within the *Attachments* tab, you should also remove the broken links on pages.

Edit Page - Attachments Tab

When you click on the *Attachments* tab of the *Edit Page* screen, you see a list of all the files attached to that page in the *File List*. MySource supports most common file types, such as Word Docs, PDFs, Excel Files, JPEGs, GIFs, ZIP files, Shockwave Files, Quicktime Movies, Flash Files, etc.

Figure 4-1 below shows the *Attachments* tab for a page to which there is two files attached:

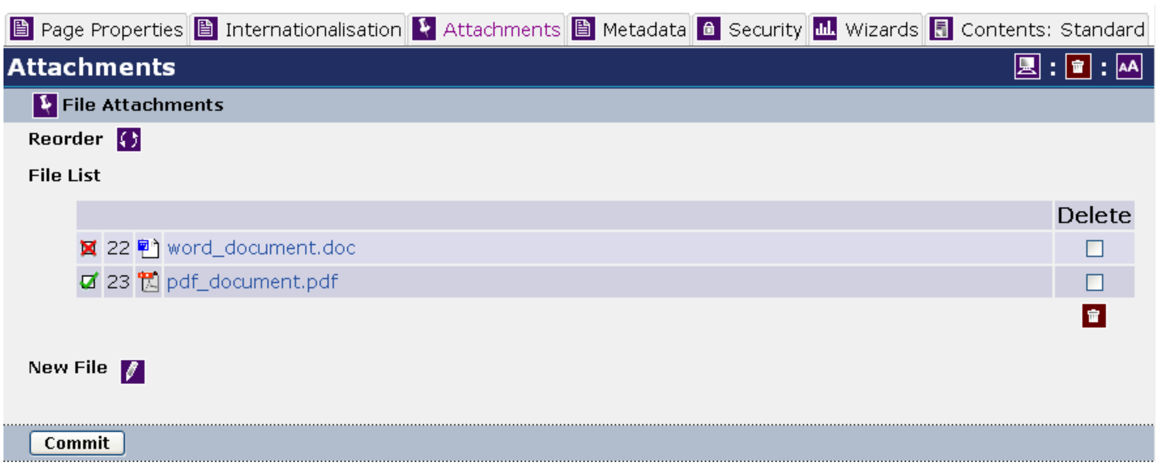


Figure 11-1 Attachments Tab

The fields in the *File Attachments* section are as follows:

- **Reorder:** you can re-order the files in the list by clicking on this icon. The *Reorder Files* pop-up window is displayed. Click on the arrows to re-order the files as required.

- **File List:** the *File List* section lists all files currently attached to the page you are editing. For each file attachment you can see a green tick or red cross indicating whether the file is visible or not (see the *Visible?* Section within the *Edit File* screen description below), the *File ID*, a *File Type* icon, the *File Name*, and a *Delete* checkbox.

  You can click on the name of a file to display the *Edit File* screen for that particular file. The *Edit File* screen is shown in Figure 11-2 and discussed below.

You can delete one or more files by ticking the *Delete* tickbox and clicking the *Delete* icon at the bottom right of the *File List*.

TIP: If you delete a file on the *File Attachments* tab without deleting the existing links in the content of other pages, this will result in broken links on those pages. You can run the *Broken Links* wizard after deleting a file, allowing you to find broken links and fix them.

TIP: Deleting a file on the *File Attachments* tab deletes that file from within MySource, thus freeing disk space on the server. If you remove all links to a loaded file, it is good practice to delete the file on the *File Attachments* tab to conserve disk space.

- **New File:** clicking on the 'New File' icon takes you to an empty *Edit File* screen showing [New] at the top, allowing you to upload the new file and add its details. The *Edit File* screen is discussed below.

Edit Page - Edit File Screen

The *Edit File* screen is used to edit the details of an existing file or upload a new one, and is shown in Figure 11-2 below:

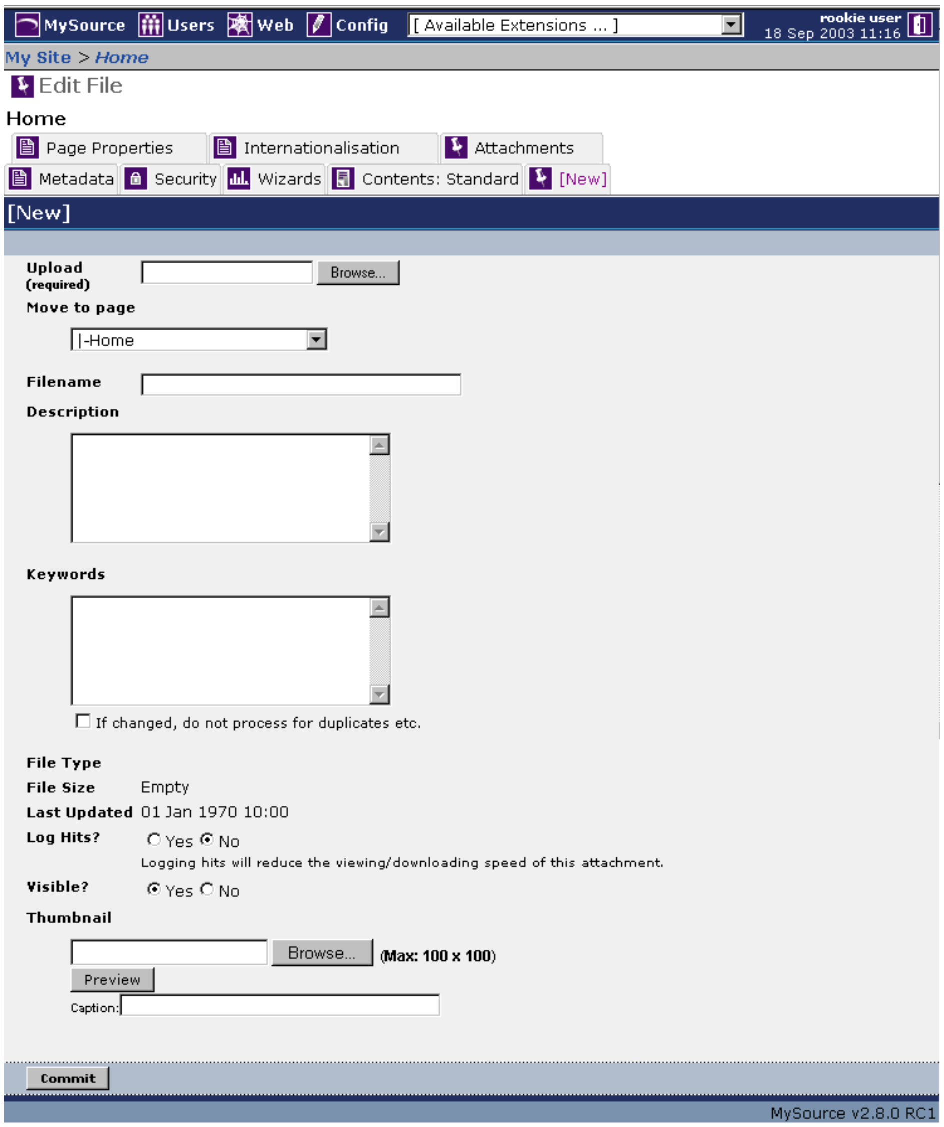


Figure 11-2 Edit File Screen – New File

- **Upload/Overwrite:** if you are in the *Edit File* screen because you selected *New File*, this field is labeled "Upload" as shown in Figure 11-2 above. If you selected to edit an existing file, it is labeled "Overwrite", as seen in Figure 11-3 below in Workshop 18.

Use this field to browse your computer's hard drive or LAN to locate the file to attach to this page.

> **TIP: If a file has changed you need to reload it into MySource for the changes to be visible in your site. "Overwrite" the existing files in this case. DO NOT upload a new file because you will have to re-link all your pages to it.**

- **Move to page:** if you want the file to sit on another page within MySource, from this drop down list select another page in your site to which to attach it.

- **Filename:** if you want to change the name of the file to be different in MySource to that of the file when it was uploaded, type the new name into this textbox. You can use any characters in your filename, but if you enter spaces in the filename, they will be replaced with underscores.

> **TIP: If you do not enter a filename in this box, the name of the original file will be used.**

- **Keywords:** all keywords that are entered here will be compared with the query string entered by the user in external search engines. In addition, if you have the MySource Site Search module installed in your system, these keywords will also be searched.

- **File Type, File Size, Last Updated:** these fields are all automatically populated when you upload the file.

- **Log Hits:** if you have the MySource Statistics reporter enabled in the *Configuration*, you can set the *Log Hits* option to *Yes* to record the individual hits to this file attachment. Note however, turning this option on increases the speed of downloading the file and increases the amount of disk space your site takes up on the web server, which may affect your hosting bill!

- **Visible?:** if the file is set to visible and your MySource site design has been set up accordingly, this file will be displayed on your site as a link allowing users to download it. In addition, a graphic to indicate the type of file it is and a note of the size of the file and when it was last updated are displayed. This is where the re-ordering of attachments function might be useful.

If you attach a file using the *Attachments* tab this field is set to "Visible" by default. However, if you attach a file using the WYSIWYG editor, it is by default set to "Not visible".

TIP: Making a file visible also makes it visible to search engines, but you must enter the appropriate keywords.

- **Thumbnail:** if your MySource site design is set up to display a thumbnail of the file attachment, you can upload your own graphic here to be used instead of the the default graphics stored in MySource for a particular file type (e.g. Word docs and PDFs). The graphic must be a thumbnail with a maximum size of 100 x 100 pixels.

  Click *Browse* to find the thumbnail file to upload. You can click the *Preview* button to preview the thumbnail, and enter a caption for the thumbnail into the textbox.

Workshop 18 Overwriting a File Attachment

In this simple workshop we practice overwriting a file that is already attached to a page, with a new version of the file.

In Workshop 8 in Chapter 8, we practiced attaching a file to a page using the WYSIWYG editor. This is the most common way to attach files to a page. However if you want to update the file that is attached to a page, you must overwrite the uploaded file. We will practice overwriting a file in this workshop:

1. Go back to the page created in Workshop 8 and preview the page. Click on the link to the file on your page and make a mental note of the document you are viewing currently. Make an obvious change to the linked file and resave it somewhere on your hard drive or LAN.

2. In the *Edit Page: Attachments* tab, bring up the *Edit File* screen for the file that you want to overwrite to by clicking on its name.

3. Note the *Last Updated* details.

4. Click the *Browse* button next to the *Overwrite* option and browse your hard drive or LAN for the updated version of the file you want to overwrite within MySource.

5. The file name and any keywords or description that you entered for the original file will be kept.

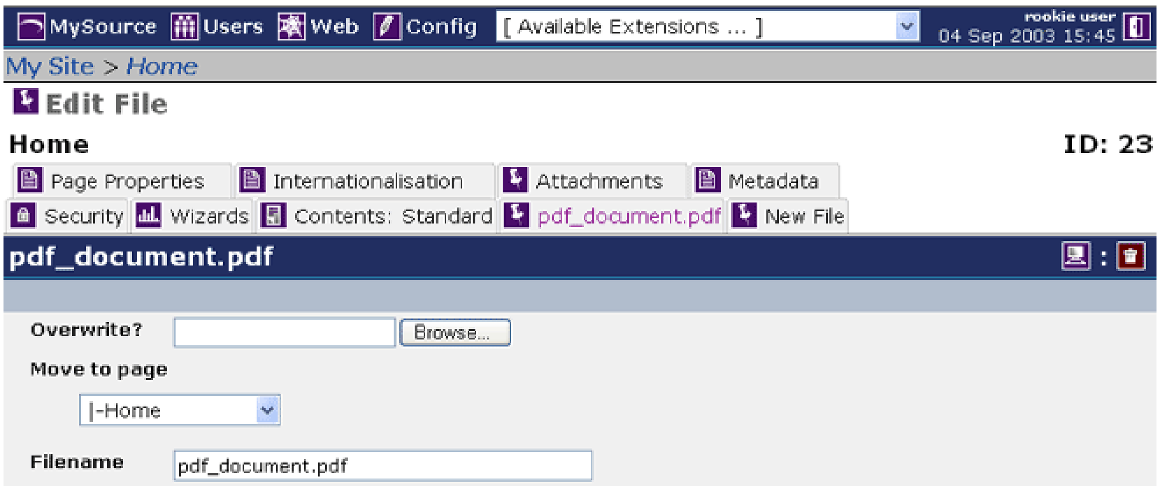


Figure 11-3 Edit File – Existing File

6. Edit any of the details of the file you want to change and *Commit* your changes.

7. The contents of the file itself have now been overwritten and the *Last Updated* details are updated.

8. Click *Preview* to see your changes. Test the link to the file on your page to make sure it opens the updated version of the file.

TIP: When you preview the new file, if you still see the older version, try refreshing the page by clicking on the *Refresh* button in the browser window. The keyboard shortcut for refresh is Shift+F5.

♣ **You have now successfully completed Workshop 18** ♣

Chapter 12 MySource Cell Types

So far, we have been adding content to pages using the WYSIWYG editing interface, which is the most commonly used method. However, the WYSIWYG functionality is only supported in Internet Explorer 5.5 and higher in a Windows environment, and is not supported by Netscape or in the Macintosh/Linux environment.

The WYSIWYG cell type is the best to use if you just want to add text and images to pages. However, you may want to do something a bit more complicated than this, such as embed multimedia content or pull content from, or redirect to, another page.

There are therefore several other cell types available within the MySource system, each with their own editing interface. The cell types available are:

- Raw HTML
- Rich Text
- WYSIWYG
- File/Image
- iFrame
- Nest Content

We have already looked at the functionality of the WYSIWYG editing interface in earlier chapters, this chapter will explain the other available editing interfaces, and how and when to use them.

Selecting a Cell Type

You can change the *Cell Type* on either the *Edit Table Cell Properties* screen for an individual cell, or on the *Edit Table Properties* screen to change the cell type for all cells in the table.

The drop down list for the *Cell Type* is shown in Figure 12-1 below:

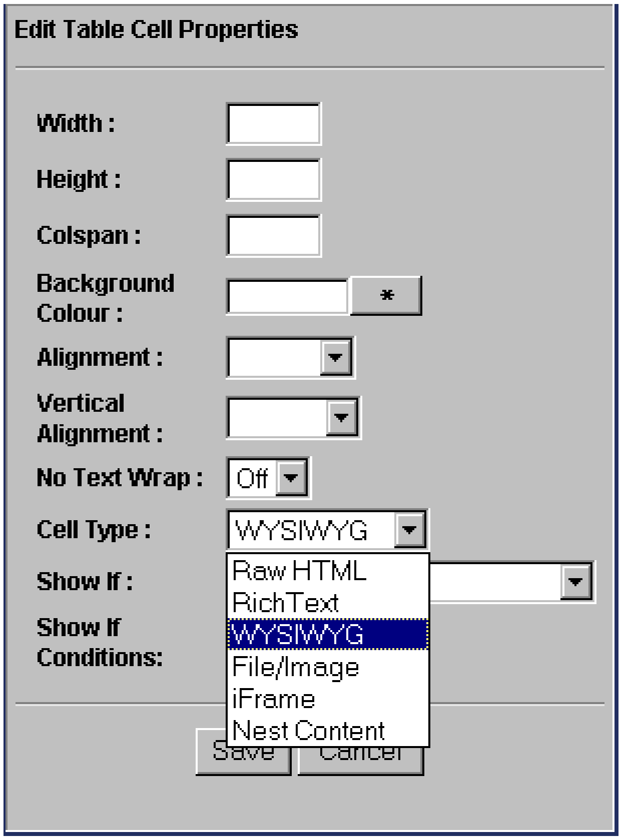


Figure 12-1 Select Cell Type

Select the required cell type, and then select *Save*, followed by *Commit*. The appropriate editing interface is then displayed, when you next select the *Edit Cell Contents* icon.

Raw HTML Cell Type

The Raw HTML cell type allows an author to write HTML code directly.

TIP: There is an HTML Cheatsheet in the Appendix of this manual.

Select *Raw HTML* from the *Cell Type* drop down list. You need to *Save* and *Commit* this change and then click the *Edit Contents* icon to open the *Raw HTML Editing Interface* as shown in Figure 12-2 below:

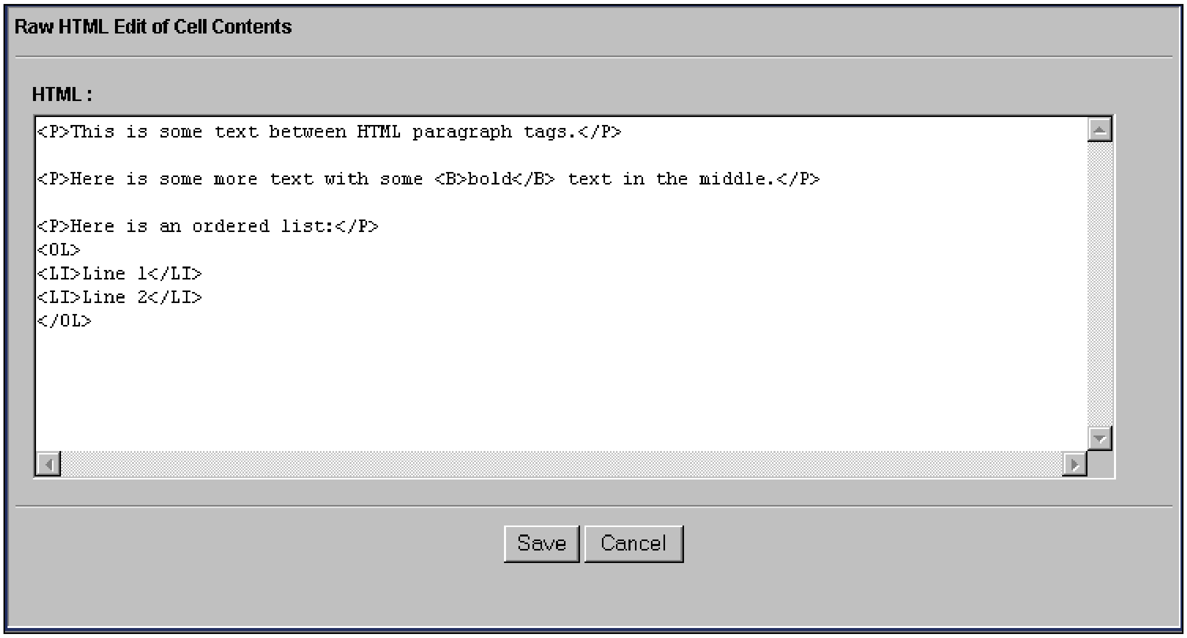


Figure 12-2 Raw HTML Editing Interface

Type in or copy and paste the HTML code into the textbox and click *Save*.

TIP: You do not need to include <html> <head> <title> or <body> tags as they are set in the design. Use only the code that would go between the <body> tags.

Preview your HTML code on your page by selecting the *Preview* icon .

Rich Text Cell Type

The *Rich Text* cell type provides shortcut syntax for automatic hyperlinking of URLs. Rich text editing is currently little used, but you may find it useful when the WYSIWYG functionality is not supported.

If the *Cell Type* is set to *Rich Text,* the editing interface shown in Figure 12-3 is displayed when you select the *Edit Contents* icon.

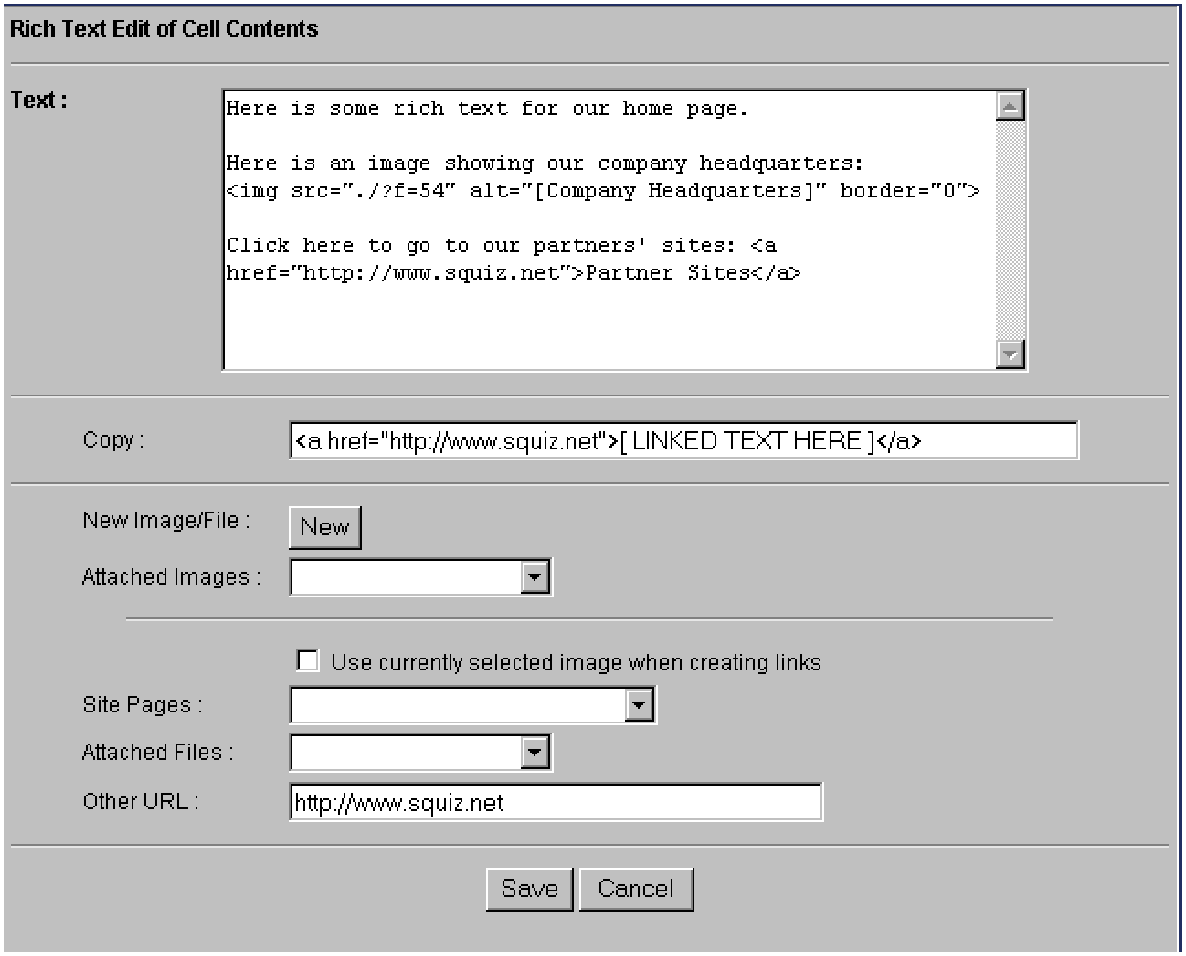


Figure 12-3 Rich Text Editing Interface

The top section of this window shows the rich text of your page. The rest of the window helps you to easily insert images and create links without having to remember the HTML syntax for these labels.

The bottom two sections help you to select an image or file to insert on your page, and create links. HTML code is automatically generated in the *Copy* text box for your images and links, and you can edit it and copy it into the *Text* text box containing your rich text at the top of the screen.

The fields are as follows:

- **Text:** enter any plain text to appear in this cell. You can also paste in the appropriate HTML code generated for selected images or links from the *Copy* text box.

- **Copy:** when you insert an image or create a link as described below, the HTML code is automatically inserted into this text field. You can then copy and paste this HTML code into the *Text* box above, in the position in which you want the image or link to appear. Remember to replace the linked text provided for a link, or the alt-text.

- **New Image/File:** click the *New* button to upload a new image and insert it in the rich text. On the *Upload* window displayed, browse to select the image to upload. Click *Commit*, and the HTML code for this image is generated in the *Copy* text box above.

- **Attached Images:** click this button to insert any images already attached to this page. The HTML code for this image is generated in the *Copy* text box above.

- **Use currently selected image when creating links:** if this box is ticked, when a link is created, it creates the HTML for a link to the currently selected image in the *Copy* text box.

  If this box is not ticked, it creates the HTML for a text link in the *Copy* text box. You should replace the "[LINKED TEXT HERE]" in the HTML created.

- **Site Pages:** select a page in your site to which to link.

- **Attached Files:** select from files already attached to this page to which to link.

- **Other URL:** type in an external URL to which to link.

TIP: Be careful not to type over the http:// protocol tags.

File/Image Cell Type

The File/Image cell type allows you to attach files and images to a page, if for example, the WYSIWYG interface is not available.

More commonly, this cell type is used to embed multimedia files to the page. MySource supports most file types but common examples include:

- Word Docs,
- PDFs,
- Excel Files,
- JPEGs,
- GIFs,
- ZIP Files,
- Shockwave Files,
- (MOV) Quicktime Movies,
- (SWF) Flash Files.

If the *Cell Type* is set to *File/Image*, when you select the *Edit Contents* icon the editing interface shown in Figure 12-4 below is displayed:

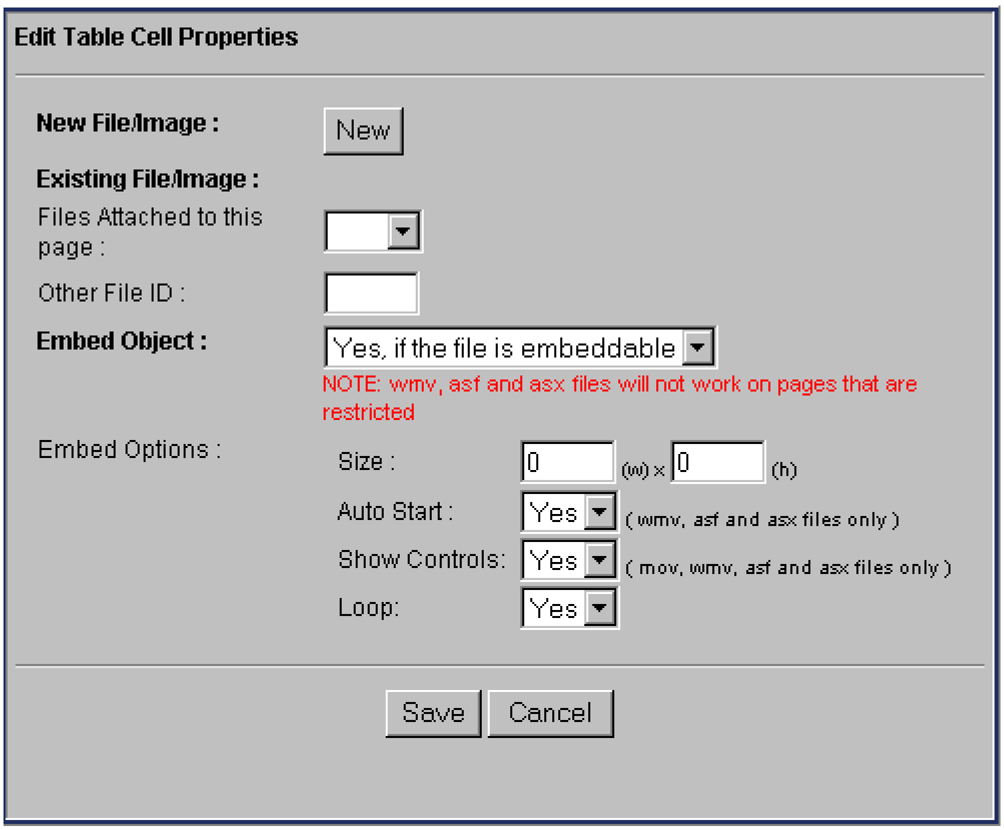


Figure 12-4 File/Image Editing Interface

- **New File/Image:** click the *New* button to upload a new file to this page.
- **Existing File/Image:** you can select a file that is already attached to this page to insert in this cell, by selecting it from the drop down list, or entering the File ID into the text box.

TIP: If the file is a Word document, PDF or Excel file a link to the file, the size of the file and the date it was last updated will be inserted in your page.

- **Embed Object:** select *Yes* to embed the file in the page if it is an embeddable file type e.g. Flash or MIDI files

TIP: If public access is restricted to a page, .wmv, .asf and .asx files cannot run as embedded files, since MySource cannot check the permissions of these file types.

- **Embed Options:** you can specify the visible size of the embedded file, whether it will start automatically or not, if the controls are shown or not and whether it will loop or not.

iFrame Cell Type

The iFrame cell type allows you to display an external website inside a single cell.

TIP: This cell type does NOT work in Netscape 4 or lower since these browsers do not support the use of Frames.

If the Cell Type is set to iFrame, the editing interface shown in Figure 12-5 below is displayed when you select *Edit Contents* icon:

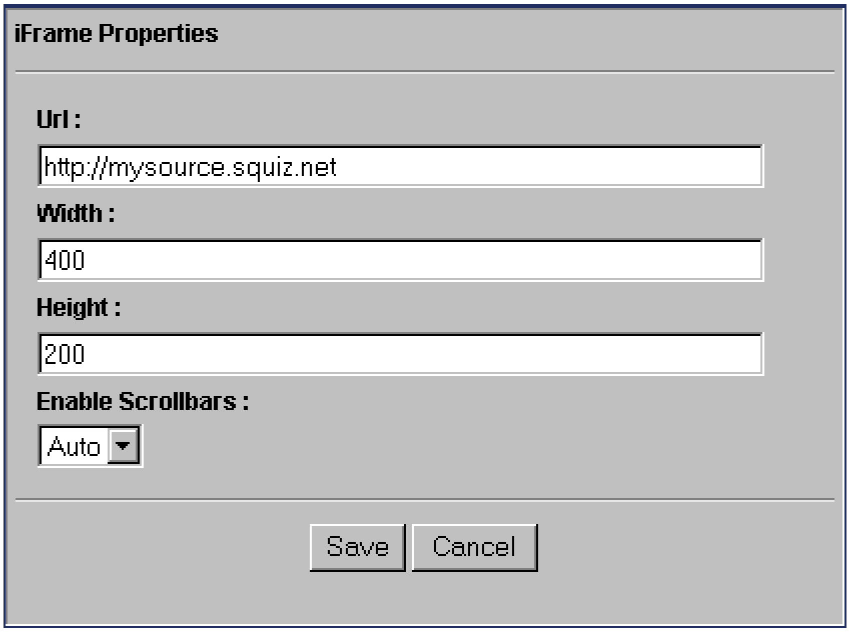


Figure 12-5 iFrame Properties Interface

- **URL:** enter the URL of the website you want to display in the iFrame cell.
- **Width and Height:** enter the dimensions for the iFrame.
- **Enable Scrollbars:** select whether scrollbars are displayed for the iFrame. If you select *Auto* from this drop down list, the scroll bars are only displayed when the user resizes the window and the scroll bars are required.

Nest Content Cell Type

The *Nest Content* cell type allows you to include the entire contents of another page from within your MySource site into one single cell.

An example of where this could be useful is if you had a section on company news within your home page. You could create a standard page called "News" and nest that page into a cell within the home page. To keep the content of the home page fresh, you only have to update the "News" page.

TIP: The *Nest Content* cell type nests another page into a single cell on your page. Use the *Pull Content* page template to pull another page into a full page.

If the *Cell Type* is set to *Nest Content*, when you select *Edit Contents*  icon, the editing interface shown in Figure 12-6 below is displayed:

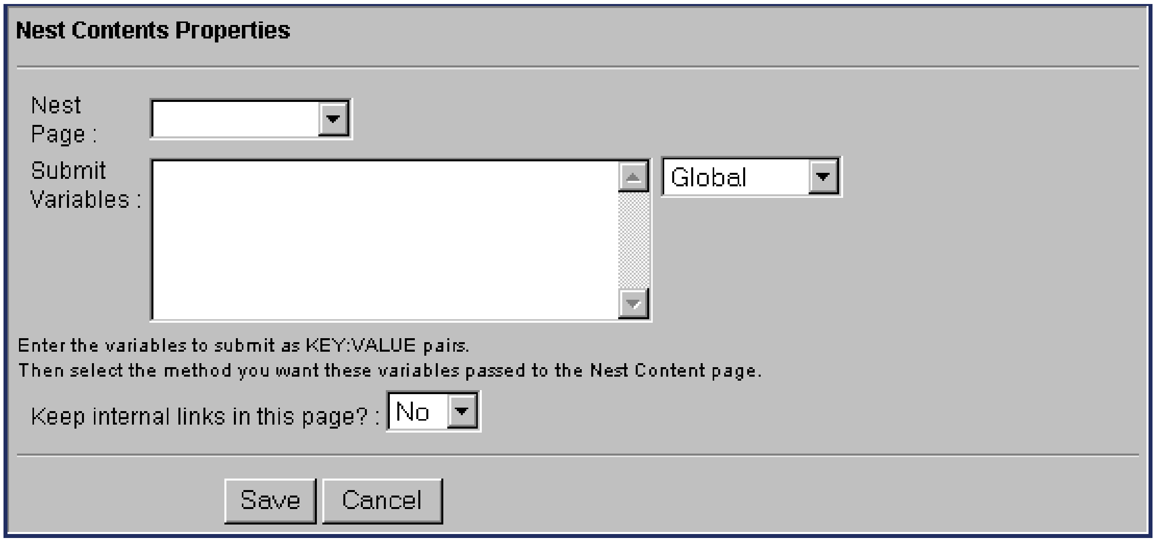


Figure 12-6 Nest Content Interface

- **Nest Page:** select the page from your site that you want to nest into this cell from the drop down list.

- **Submit Variables:** enter the variables to be submitted to this page, as KEY:VALUE pairs. Enter each KEY:VALUE pair on a new line.

  You must also select the method by which these variables should be passed to the nested page in the drop down list on the right hand side. Select from Global, GET/POST, GET, POST, or SESSION.

- **Keep Internal Links in this page?:** if you select *Yes*, when a user clicks on a link in the nested content, the linked page is also displayed as nested content of this page. If you select *No* in this drop down list, when a user clicks on a link in the nested content, the user is taken to the linked page.

Chapter 13 MySource Page Templates

All pages in MySource must use a page template which determines the functional properties of the page. Up until now, we have been adding content to pages using the *Standard* page template which is the most common and easy to use.

However, there are several other page templates available as part of the core MySource system. The core page templates in MySource v2.8 and above are:

- Custom Form
- Forbidden (login page)
- Frames
- Metadata Harvest Control List
- Pull Content
- Redirect
- Standard
- Sub Page Listings

In this chapter we will go through the *Forbidden*, *Pull Content*, *Redirect*, and *Sub Page Listing* templates. The *Custom Form* template is more complex and will be covered in more detail in Chapter 14. *Frames* are not generally used any more, and the *Metadata Harvest Control List* is a very specialised template and these template types will not be explained further in this manual.

Selecting a Page Template

You can either select the page template you want to use when you first create a new page or sub-page, or you can change the template of an existing page from one type to another on the *Page Properties* tab, under the *Identification* section as shown in Figure 13-1 below.

TIP: Please note that if you change the page template, you will lose any existing content on that page.

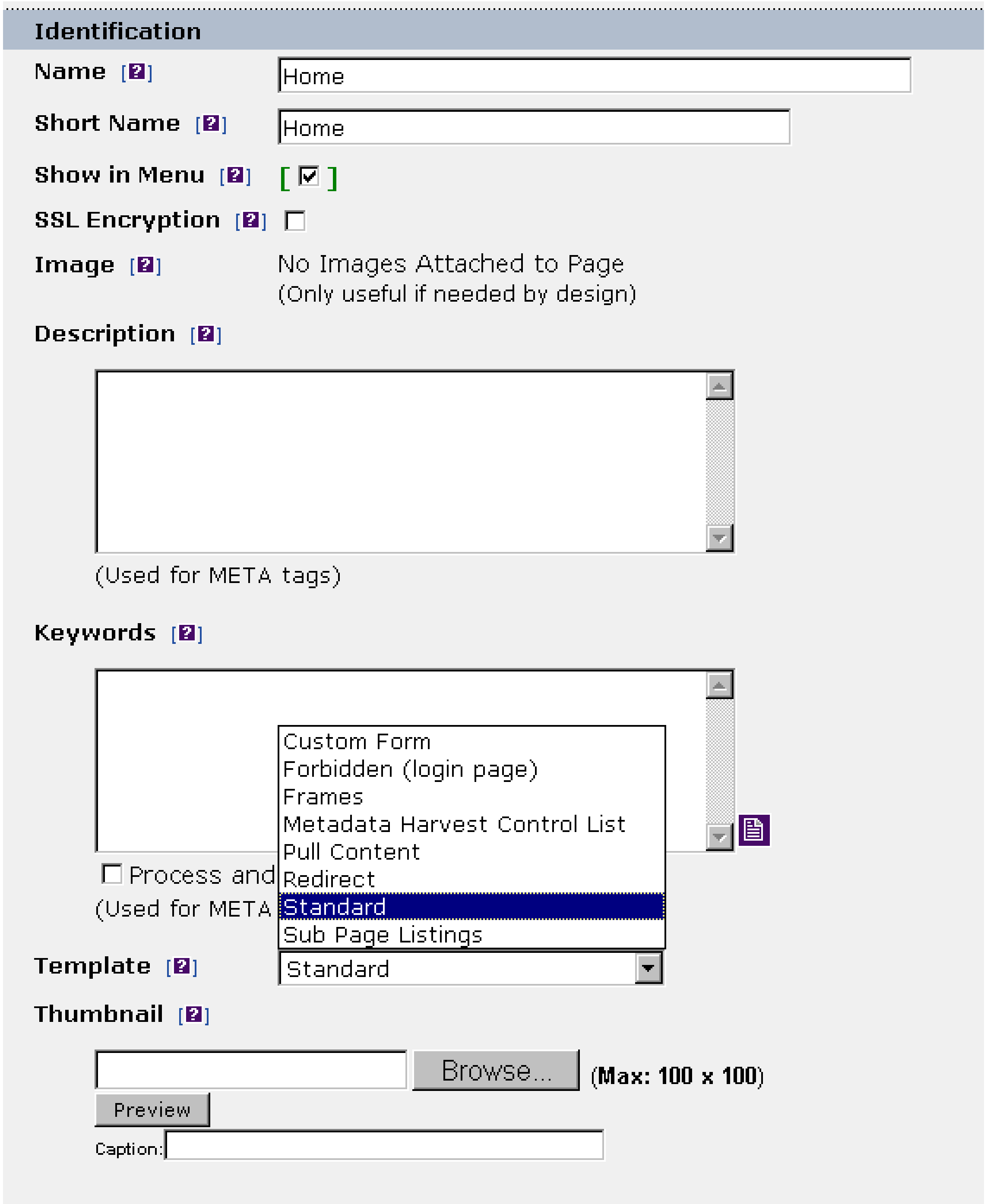


Figure 13-1 Changing the Page Template

TIP: You may see more templates in the drop down list depending on the modules that have been installed in your system, as different modules include different template types.

TIP: When you change template type and click on *Commit*, the *Contents* tab displays the name of the previous template type until you click on the *Contents* tab.

Forbidden (login page)

This template is used to define the page displayed when users log in and log out.

The Forbidden (login page) template screen is shown in Figure 13-2 Forbidden Page below:

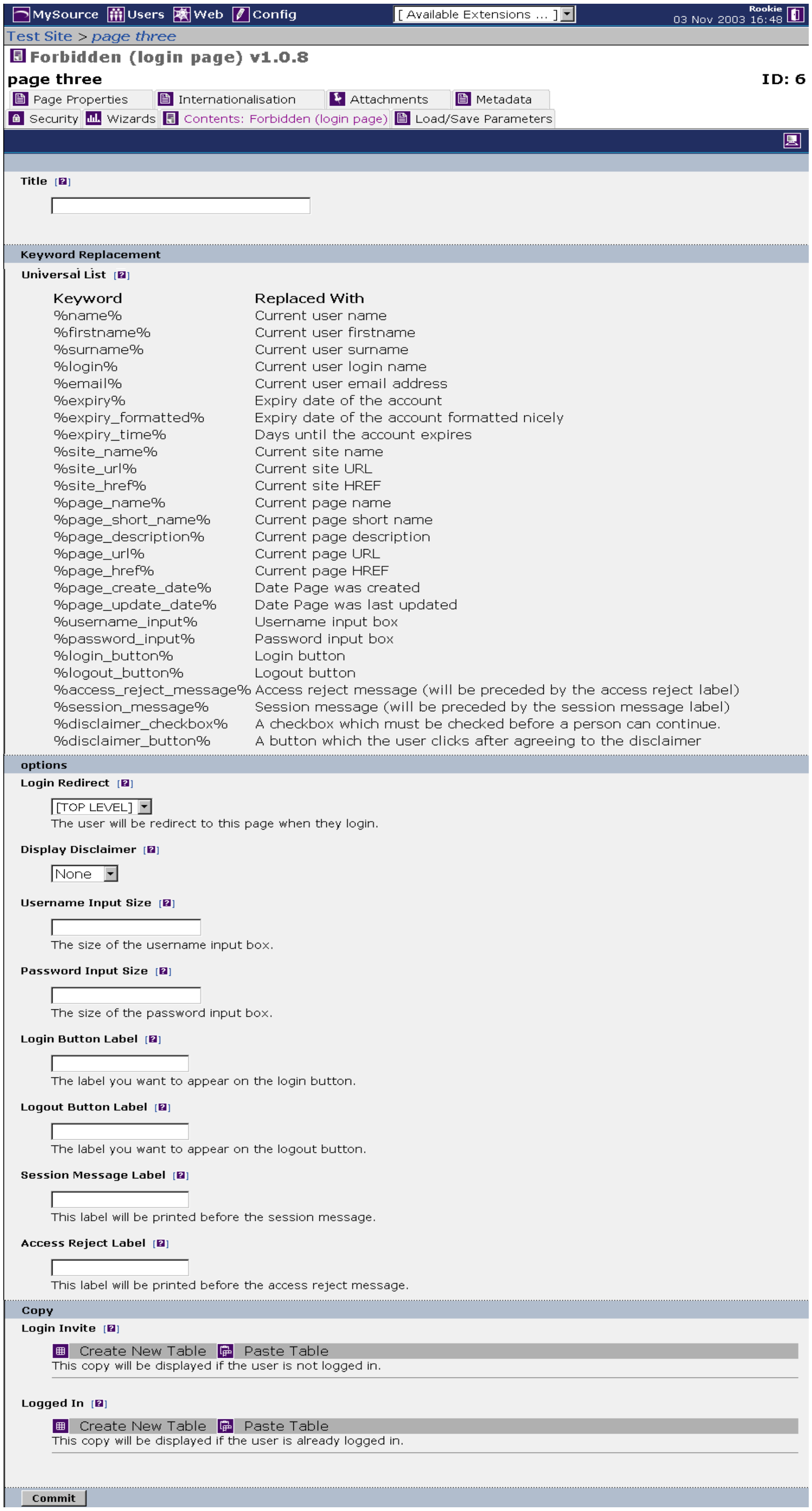


Figure 13-2 Forbidden Page

Title

- **Title**: enter the title for the page into this textbox.

TIP: By default, this will not appear on your page within your site, but if you want the title of the page to be printed on each page as a heading, the design can be coded to do this.

Keyword Replacement

This section shows a summary of the available keyword replacements available for use in the copy section. There are five that are very useful:

- **%firstname%:** this keyword replacement prints the first name of the person who is logged in. It is for use in the *Logged In* field in the *Copy* section.
- **%username_input%:** this keyword replacement prints a text box for the user to type in their username/login. It is for use in the *Login Invite* field in the *Copy* section.
- **%password_input%:** this keyword replacement prints a text box for the user to type in their password. It is for use in the *Login Invite* field in the *Copy* section.
- **%login_button%:** this keyword replacement prints a "login button". It is for use in the *Login Invite* field in the *Copy* section.
- **%logout_button%:** this keyword replacement prints a "logout button". It is for use in the *Logged In* field in the *Copy* section.

Options

- **Login Redirect**: select a page to which to re-direct a user as soon as they log in from this drop down list.
- **Display Disclaimer:** select the options for your disclaimer from this drop down list. You can select no disclaimer, or to display it before, after or on the same page as the login page.

> **TIP: If this option is set to any value other than *None*, a *Disclaimer* section will be shown in the *Copy* section at the bottom of the screen. You can enter the copy for your disclaimer in this section.**

- **Username Input Size:** enter the size of the user name input box into this textbox.
- **Password Input Size:** enter the size of the password input box into this textbox.
- **Login Button Label:** enter the label to appear on the login button into this textbox.
- **Logout Button Label:** enter the label to appear on the logout button into this textbox.
- **Session Message Label:** enter the label to be printed before the session message into this textbox.
- **Access Reject Label:** enter the label to be printed before the access reject message into this textbox.

Copy

- **Login Invite:** the body copy defined here is displayed when a user is not logged in to your site. This typically contains a message that tells the user that they are not logged in, and a login area for them to login.
- **Logged In:** the body copy defined here is displayed when a user is logged in to your site. As described above, this typically contains a message to tell the user they are logged in, and a button to log out.

For each copy section, create a table and reference the relevant fields such as the text box for a password (%password_input%) and for a logout button (%logout_button%). The keyword replacements are discussed above.

> **TIP: To test both the *Login Invite* and *Logged In* copy, make sure that this page is *Live*.**

Pull Content Page Template

This template allows you to have exactly the same content on two or more pages in your MySource system. This can be very useful, as you only have to update the content in one place.

An example of this might be if you have a "News" section of your site and want it to stand alone as well as be part of a "Marketing" section. The "Marketing" section can use a *Pull Content* template, to pull its content from the "News" section.

TIP: The *Pull Content* page template nests another page into a whole page. You can use the *Nest Content* cell type to nest another page into a single cell on your page.

The *Pull Content* page template is shown in Figure 13-3 below:

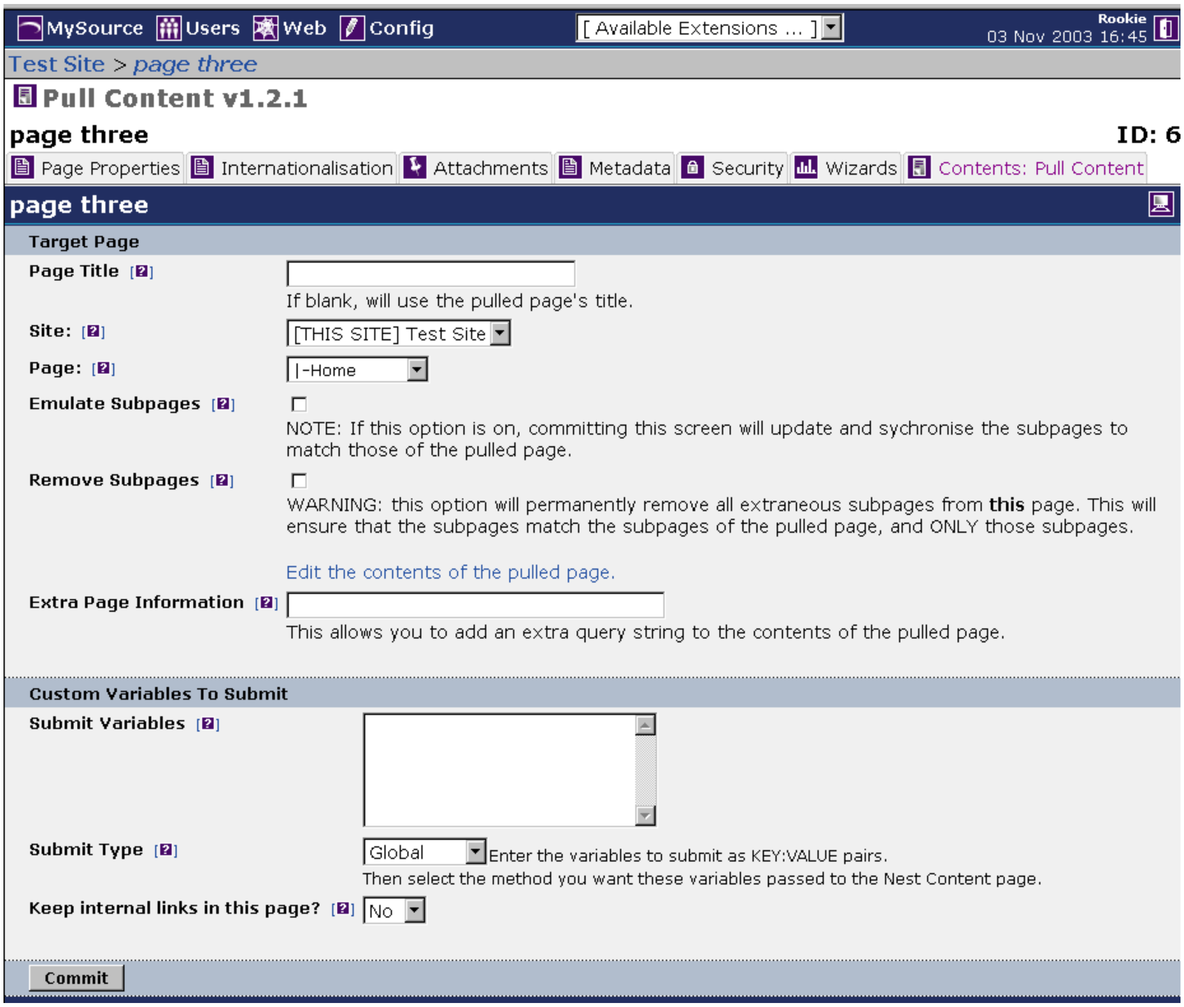


Figure 13-3 Pull Content Page Contents

Target Page

- **Page Title:** the *Page Title* is only applicable if your design has been set up to display the page title at the top of each page. In this case, enter the page name in this field. If you do not enter the page title, the title of the pulled page will be used, which may not be appropriate for this new page.
- **Site:** choose the site in your MySource system from which you will select the page to pull.
- **Page:** this drop down list contains the pages for the selected site. Choose the page from which you want to pull content from this drop down list.

- **Emulate Subpages:** if you tick this box, any sub-pages of the page you are pulling will be duplicated to become sub-pages of this page too. The sub-pages will also use the pull content page template.

- **Remove Subpages:** this function works in conjunction with the *Emulate Sub-pages* function. If you tick this box, if you have selected to emulate the sub-pages of the pulled page, any existing sub-pages of this page will be deleted. A warning message will pop up to ensure you want to delete the existing sub-pages.

- **Edit the contents of the pulled page:** this is a link to the *Contents* tab of the pulled page. The pulling page has no contents of its own, and hence you update the content of the pulling page by editing the content of the pulled page. To edit the pulled page you can either use this link, or go directly to the pulled page and edit its content.

- **Extra Page Information:** this information is currently not used.

Custom Variables to Submit

TIP: These field are the same as found for the *Nest Content* cell type.

- **Submit Variable:** enter the variables to be submitted to this page, as KEY:VALUE pairs. Enter each KEY:VALUE pair on a new line.

  You must also select the method by which these variables should be passed to the nested page in the drop down list on the right hand side. Select from Global, GET/POST, GET, POST, or SESSION.

- **Keep Internal Links in this page?:** if you select *Yes*, when a user clicks on a link in the nested content, the linked page is also displayed as nested content of this page. If you select *No* in this drop down list, when a user clicks on a link in the nested content, the user is taken to the linked page.

Workshop 19 Creating a Pull Content Page

This workshop gives you the opportunity to practice using the pull content page template.

Make sure you are in the Site Properties screen.

1. Create a new page called 'Pull Content Test' and select *Pull Content* from the *Template* drop down list above the *Create New Pages?* text box.

2. When you click *Commit*, you are taken to the *Page Properties* of this new page.

3. Click on the *Contents* tab.

4. Enter a title for this new page in the *Page Title*.

5. Select the site and page from which you want to pull content (make sure you select a page to which you have added content, so you will be able to see the results when you preview the page).

6. If you are selecting a page that contains sub-pages and want them to be emulated here, click *Emulate Subpages*. (For the purposes of this exercise, ignore the remaining options).

7. Commit your changes, check your site map and click preview to see the pull content page in your site.

8. Now go back to the *Contents: Pull Content* tab and click on the *Edit the contents of the pulled page* link

9. You are then taken to the *Content* tab of the pulled page.

10. Make an obvious change to this page and select *Commit*. Again, preview both your test pull content page and your pulled page. The change is reflected on both pages, but you have only had to make the change in one place!

♣ **You have now successfully completed Workshop 19** ♣

Redirect Page Template

This template allows you to forward traffic from this page to another page either within your MySource site, or to an external site.

The *Redirect* template is shown below in Figure 13-4:

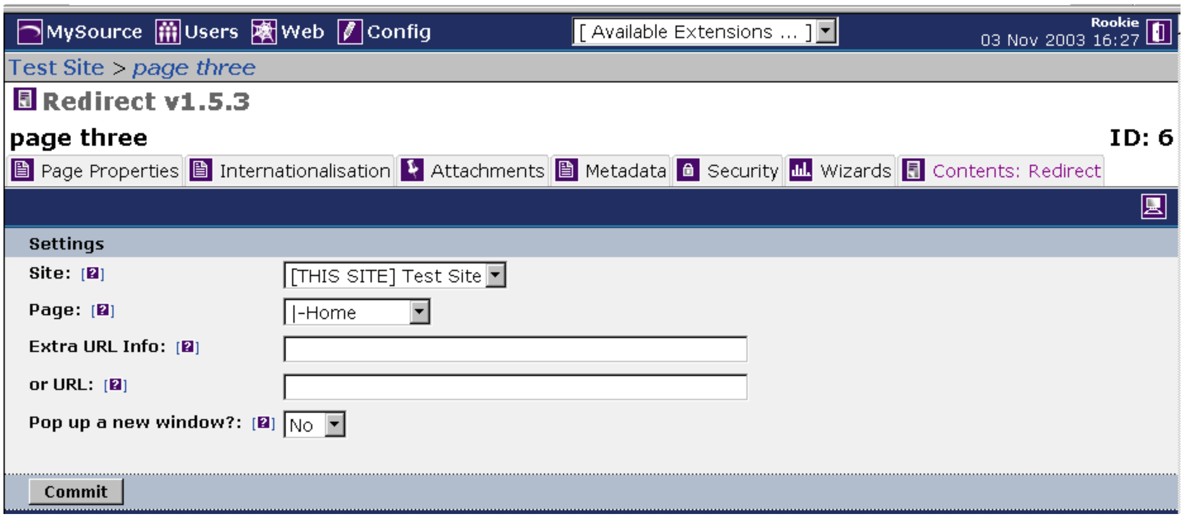


Figure 13-4 Redirect Page Contents

- **Site:** choose the site in your MySource system to which you wish to redirect traffic.

- **Page:** choose the page to which you would like to redirect traffic.

- **Extra URL Info:** you can specify extra data to send as part of the URL query string in this field (e.g. linking to other MySource modules such as Frontitia). Enter your key value pairs separated by an ampersand e.g. "action=send&redirectID=5".

- **or URL:** specify an external site to which you would like to redirect traffic. (e.g. www.google.com).

- **Pop up a new window?** if set to *Yes*, the redirect will pop up in a new browser window, and if set to *No* it will be displayed in the current window. If it is set to *Yes*, a list of checkboxes is displayed which allow you to configure how the pop up window appears (e.g. 750x500px, scrollbars, etc). The default selection for this drop down list is *No*.

Sub Page Listings Template

This template provides a listing of the sub-pages of the page you are currently editing, which acts like a mini-site map. You can define the format for the sub-page listing, and this page is automatically re-generated when changes are made to the page hierarchy of your sub-pages.

This page template also utilises keyword replacements.

The *Sub Page Listings* contents screen is shown in Figure 13-5 below:

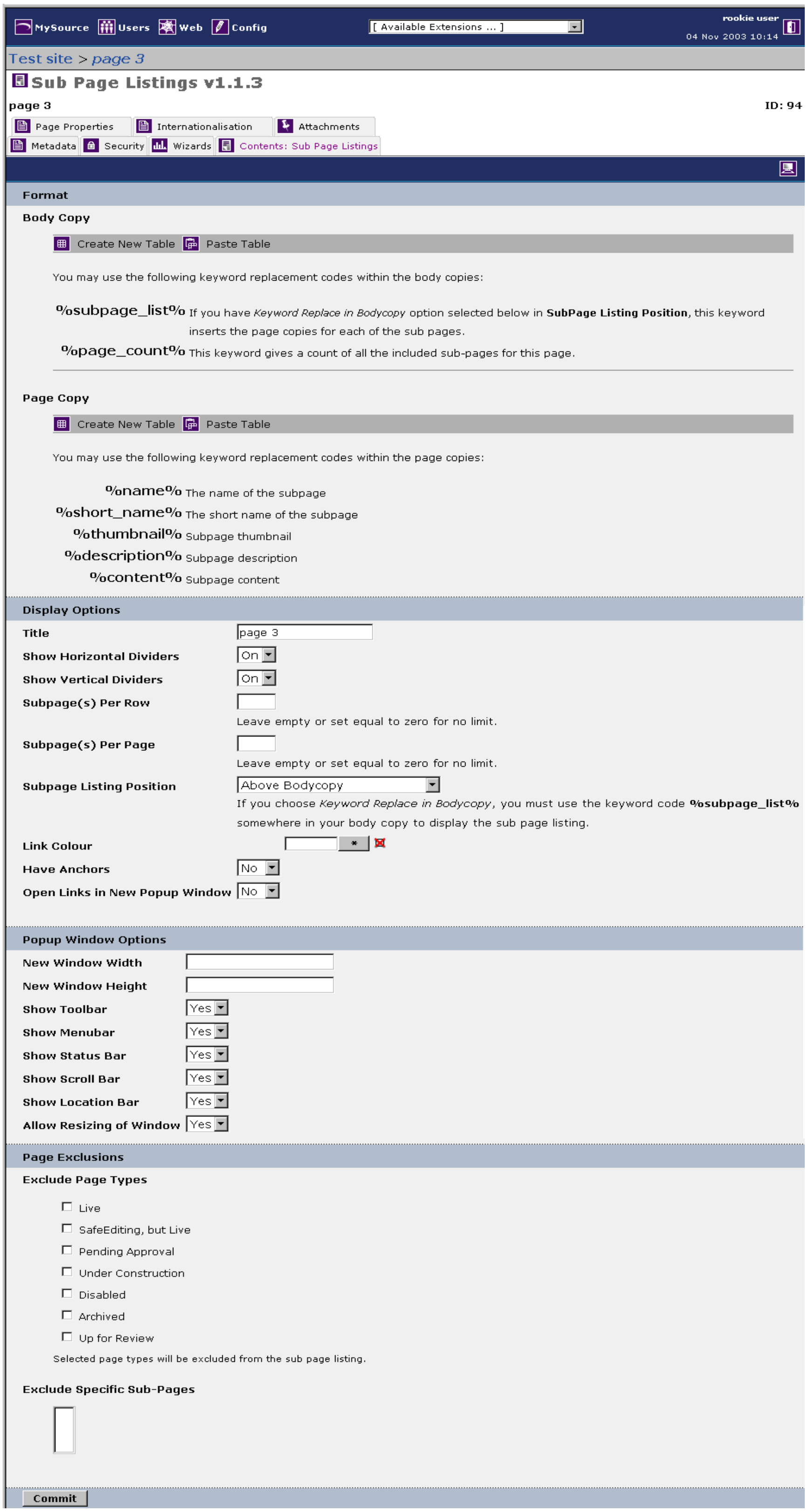


Figure 13-5 Sub Page Listing Contents

Format

There are two copies to be set for a *Sub Page Listings* page:

- **Body Copy:** this allows you to define the copy to appear at the top or bottom of each sub-page listing, which can include both text and images.

  You can specify where your copy appears on the page by setting the *Subpage Listing Position* drop down list in the *Display Options* section*:*

  – If *Subpage Listing Position* is set to "Above/Below Body Copy", the listing of the sub-pages appears above or below this body copy. In this case, you do not need to use the %subpage_list% keyword replacement.

  – If you want to put copy both above and below the sub-page listing, you can use the %subpage_list% to indicate the position for the list within the copy. You must then set *Subpage Listing Position* to "Keyword Replace in Body Copy".

  You can also use the keyword replacement "%page_count%" to display how many sub-page listings there are.

- **Page Copy:** this allows you to define the attributes that are shown for each page in the sub-page listing. There are five keyword replacements for page attributes that you can use. They are:

  %name%: this keyword replacement prints the name of the sub-page and appears as a link to that page.

  %short_name%: this keyword replacement prints the short name of the sub-page, and appears as a link to that page.

  %thumbnail%: this keyword replacement displays the thumbnail of the sub-page image, and appears as a link to that page.

  %description%: this keyword replacement displays the description field sub-page.

  %contents%: this keyword replacement displays the contents of the sub-page.

TIP: You must include at least one of the five keyword replacements described above in your *Page Copy*.

TIP: The page copy you enter will be displayed for each page, from left to right on the screen.

Use the *Subpage(s) Per Row* and *Subpage(s) Per Page* settings to determine the layout of your page.

Display Options

These settings control the look and feel of your *Sub Page Listing* page.

- **Title:** enter the title for your page here.

TIP: By default, this will not appear on your page within your site, but if you want the title of the page to be printed on each page as a heading, the design can be coded to do this.

- **Show Horizontal Dividers:** select *Yes* from this drop down list to display a Horizontal rule (a thin grey line) separating each row of listings.
- **Show Vertical Dividers**: select *Yes* from this drop down list to display a vertical rule separating the page copy for each page.
- **Subpage(s) Per Row**: enter how many listings are to appear per row.

TIP: If you leave this field blank or set it to zero, MySource will display the page copy for each of your sub-pages in one row. The page copy will be wrapped at a width allowing all the sub-pages to appear on one row, so if you choose this option and you have many sub-pages, you should keep your copy short.

- **Subpage(s) Per Page**: enter how many listings are to appear per page. If there are more sub-pages than you specify here, a *Next* and *Previous* link automatically appear to allow you to navigate between sets of listings.

- **Subpage Listing Position:** as described above, this setting dictates where the sub-page listings appear: above or below the *Bodycopy* of the page, or as a keyword replacement in the *Bodycopy*.

- **Link Colour**: you can set a different link colour from that set in the style sheet here. If you have set a link colour, a tick appears in the box to the right of this field.

- **Have Anchors:** set this drop down list to *Yes* to create anchors in the HTML of your page for each sub-page. You can then include references to the anchors in the HTML of your page for your *Bodycopy* or other pages.

- **Open Links in New Popup Window:** set this drop down list to *Yes*, to open a link in a new window upon clicking on a sub-page link on the Sub Page Listing page.

Pop-up Window Options

This section allows you to define the settings for the window in which your sub-page listing pops up.

Page Exclusions

- **Exclude Page Types**: this section allows you to exclude certain sub-pages from appearing on your *Sub Page Listing* page. You can exclude sub-pages according to their status – for example, you may wish to exclude *Under Construction, Disabled and Archived* pages.

- **Exclude Specific Sub-Pages**: you can also exclude specific sub-pages. Each of the sub-pages of this page appear in this box, and by holding CTRL or SHFT and clicking on the sub-page names, you can specify the sub-pages to exclude from appearing on your *Sub Page Listing* page.

Chapter 14 Custom Form

This chapter covers the ***Custom Form Page Template***, which is used to build online forms to allow users to submit information, gather feedback, conduct surveys, create online order forms or add people to mailing lists.

To help you understand creating custom forms, this chapter covers in detail the *Contents: Custom Form* tab including the *Form*, *Format*, *Options*, *Submission Logs* and *Load/Save Parameters* tabs. Please note that the Page Properties, Internationalisation, Attachments, Metadata and Security tabs will not be covered again in this chapter – if you need a refresher on these, please refer to Chapter 7.

TIP: This chapter covers each of the sections on each of the tabs, in a reference-style format.

As some of these tabs are quite long and complex, you may wish to firstly go through the two workshops at the end of this chapter, and then come back to some of the more complicated settings later.

The first workshop takes you through creating a simple form with no formatting, and the second workshop goes on to add a more complex format to that form.

Custom Form Tabs

Five new tabs are available as part of the *Contents: Custom Form* screen which allow you to define the details of your form. The additional tabs are shown in the figure below:

Figure 14-1 Custom Form Tabs

They are:

- Form
- Format
- Options

- Submission Logs
- Load/Save Parameters

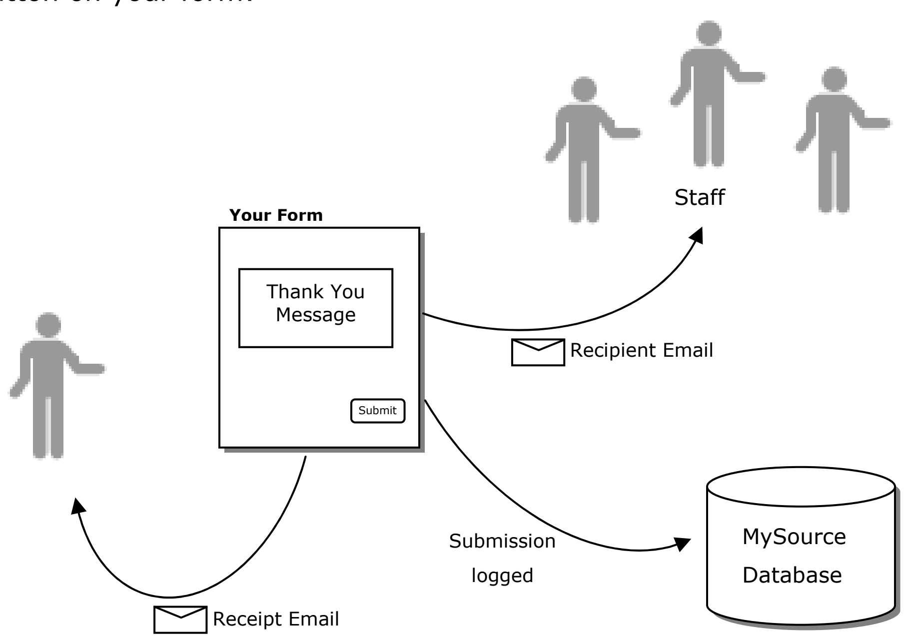
About Forms

Before we take you through the new tabs and defining a form, we will describe a few things about forms in general, as well as what happens when a user completes a form and hits the *Submit* button, so that you can understand the concepts involved.

A form consists of questions, grouped into sections. For example, you may have a section titled "Personal Details", which has the questions: "Name", "Address" and "Date of Birth". The questions for your form are defined on the *Form* tab.

You can have your questions appear on the page sequentially in the order of the sections, or you can define a complex format using tables to define the layout and background colour. This is done on the *Format* tab.

After the user has answered the questions on your form, MySource does several things with the results. The diagram below shows what happens after a user has clicked the *Submit* button on your form:



As shown in the diagram above, when the user clicks the Submit button, the following happens:

- The form page is updated with a *Thank You Message*

- The user receives a *Receipt Email*
- A member (or members) of your staff receive *Recipient Email*
- The submission is logged to the MySource database

All of the actions above are optional and you define your *Thank You Message*, *Receipt Email* and *Recipient Emails* and other details about your form on the *Options* Tab. You can export the submissions logged to the MySource database in the *Submission Log* tab.

Each of the tabs is now described in detail, followed by two workshops which take you through creating a simple form, and adding a more complex layout.

Contents: Custom Form

When you click on *Contents: Custom Form* tab, the *Summary* page shown in Figure 14-2 is displayed.

The *Summary* page is different to the *Contents* screen for other page templates, as it contains shortcut links to allow you to get directly to the different sections that define your custom form. No new information is entered on this page.

TIP: You can either use the tabs to get to the different screens to define your form, or navigate to different sections of the tab screens using the hyperlinks on this screen.

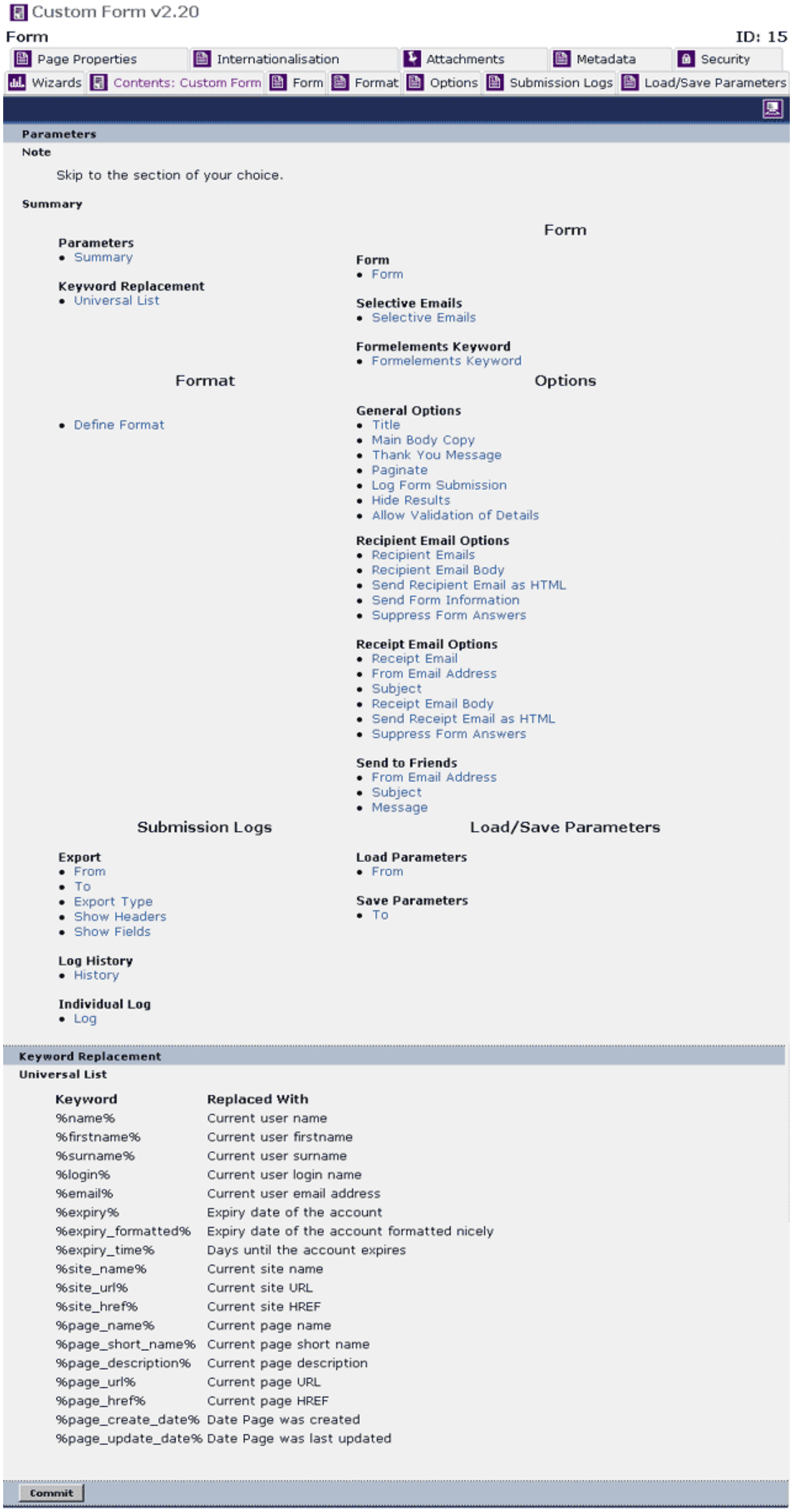


Figure 14-2 Custom Form Summary Page

Form Tab

When you click on the Form tab, the following page is displayed:

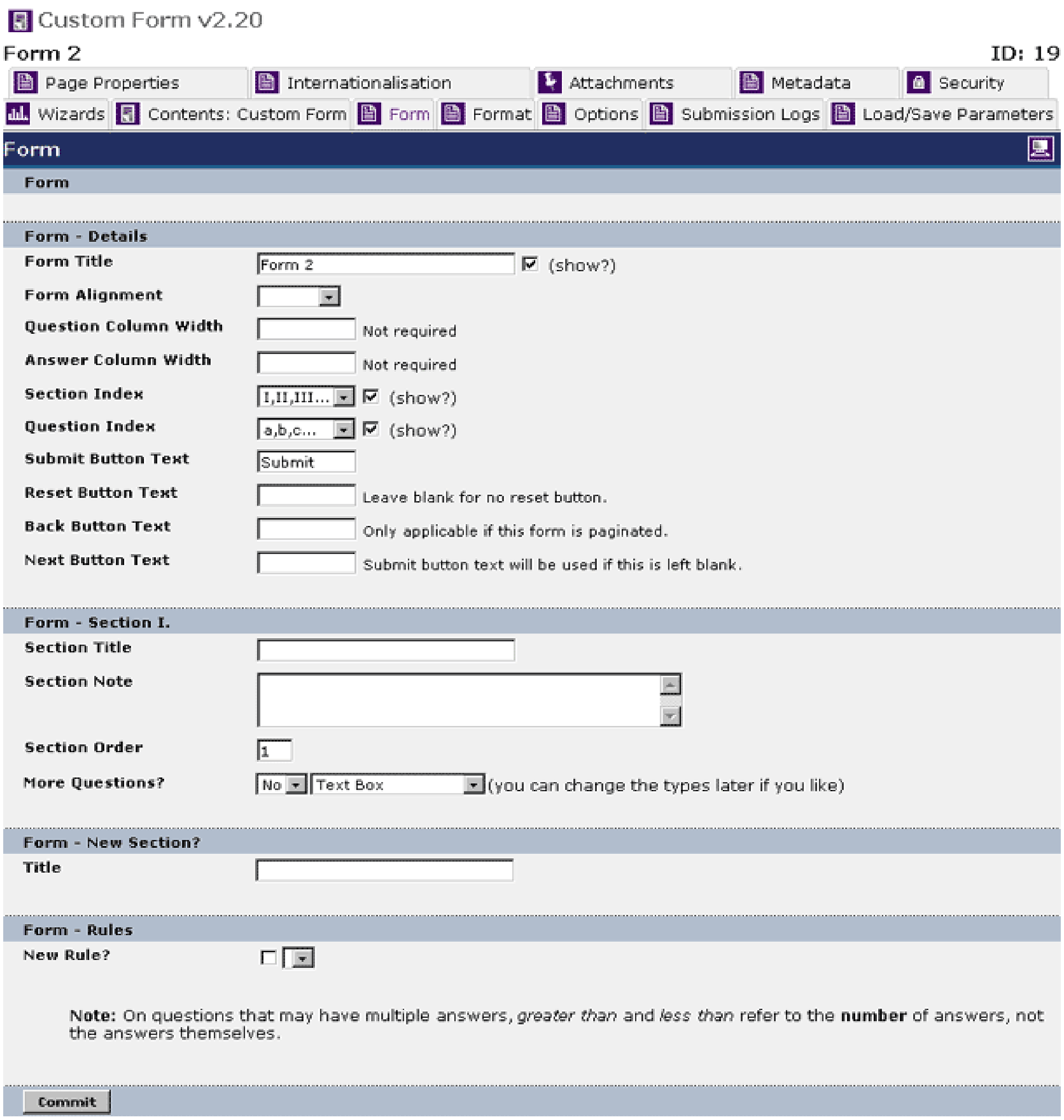


Figure 14-3 The Form Builder

This page is used to build the contents of your form and the questions it contains. It has three main sections:

- Form – Details
- Form – Sections
- Form – Rules

We will now go through each of these sections in detail.

Details

This section defines the general details for your form:

- **Form Title:** enter a title in this field and tick the *Show* box to print the title at the top of your form.
- **Form Alignment:** this option determines the alignment of the form on the page: left, right or centre.
- **Question Column Width:** this optional field allows you to set the width of the question column. The width can be expressed in pixels (numerals with no suffix) or as a percentage (%).
- **Answer Column Width:** this optional field allows you to set the width of the answer column. The width can be expressed in pixels (numerals with no suffix) or as a percentage (%).
- **Section Index:** select the format in which your sections will be auto-numbered, e.g. I, II, III or 1, 2, 3 or A, B, C. If the *show?* tickbox is unchecked, your sections will not have any numbering or markings.
- **Question Index:** this is the same as the *Section Index*, but is for questions within sections. As with the *Section Index* above, if the *show?* tickbox is unchecked, your questions will not have any numberings or markings.
- **Submit Button Text:** this option allows you to change the text that appears on the form's *Submit* button. If left blank, the default text is "Submit".
- **Reset Button Text:** this option allows you to change the text that appears on the *Reset* button. If left blank, no *Reset* button will appear on the form.
- **Back Button Text: t**his option allows you to over-write the default text of "Back" for the *Back* button. The *Back* button only appears if the form is paginated, i.e. if it runs over more than one page. Pagination is set on the *Options* tab and is described later in this chapter.

- **Next Button Text:** as for the *Back* button, the *Next* button only appears if the form is paginated. This option allows you to over-write the default text of “Next”.

Sections

For any form to function properly, you must have at least one Section, and at least one Question. A Section can contain as many Questions as you like, and you can create as many Sections as you like (e.g. Section A – Personal Details, Section B – Interests, etc).

Each *Section* of your form can appear on a page of its own. If a form has more than one page, it is called a paginated form. You can set a form to be paginated on the *Options* tab, and this is described later in this chapter.

For each section in your form, the following fields appear:

- **Section Title:** this is where you enter the name for the section (e.g. "Personal Details" or "Work History"). If you do not wish to split your form up into multiple sections, leave this field blank.

- **Section Note:** you can add additional information relating to the section here (e.g. "Please list only qualifications for courses or certificates that have been completed.") The *Section Note* appears underneath the *Section Title* on your form, however you may still have a *Section Note* if you have left the *Section Title* blank.

- **Section Order:** this is a number field, which is used to set out the order in which the user will view the sections of the form. For example, if you created the section "Qualifications" before "Personal Details" but would like "Personal Details" to be listed on the page before "Qualifications", you can change the section order of "Personal Details" to 1, and "Qualifications" to 2.

- **More Questions?:** this is where you add questions to your form. Select the number of questions that you wish to add to the section from the drop down list. Select the type of field to be used for the question in the next drop down list, which can be changed later.

  After you click on *Commit*, extra fields will be created in this section, based on the number and type of the questions that you requested.

The types of question fields that can be created are as follows:

- **Hidden Field:** this question type is used for passing information between forms, and is an advanced HTML concept requiring knowledge of scripting. We will not go into any more detail on this question type here.

- **Text Box:** this question type is a box in which the user can enter any details they want. A text box can be single or multiple rows, and can be limited to a set amount of characters.

- **Dropdown/List Box:** this question type is used when you want the user to select one of the options that you have specified from a drop down list.

- **Tick-box list:** this question type is used when you want the user to select more than one option from a list of options. Users can see all options on the page and can select the tick-box next to their choice. Tick-boxes can have a default setting of ticked or un-ticked.

- **Date/Time:** this question type contains the option to include date and time fields (in the form of drop down or text box fields). This will be explained in more detail later.

- **Email address:** this question type is a text box that can be used for email addresses. The validity of an email address entered is automatically verified - only alpha-numeric characters and "." are acceptable and it must contain the "@" character.

- **Country:** this question type is a pull-down list containing a pre-existing list of country names.

- **Login/Username**: this question type is a text entry field that can be used for login or user names. The validity of a login name entered is automatically verified - only alphanumeric characters are acceptable.

- **Password:** this question type is a text entry field that allows users to enter passwords and displays this to the user as "*****".

- **File Upload:** this question type is used to allow users to upload file attachments. As an example, you may want users to attach a resume to a form submitting a job application.

- **Email List:** this question type is used to allow users to enter a list of name and emails addresses. The number of list entries is extended when the user hits return in the final field in the list.

You will be presented with different editing options depending on the type of question you select. However, there are several fields that are common to all question types and are shown in Figure 14-4 below.

Common Question Fields

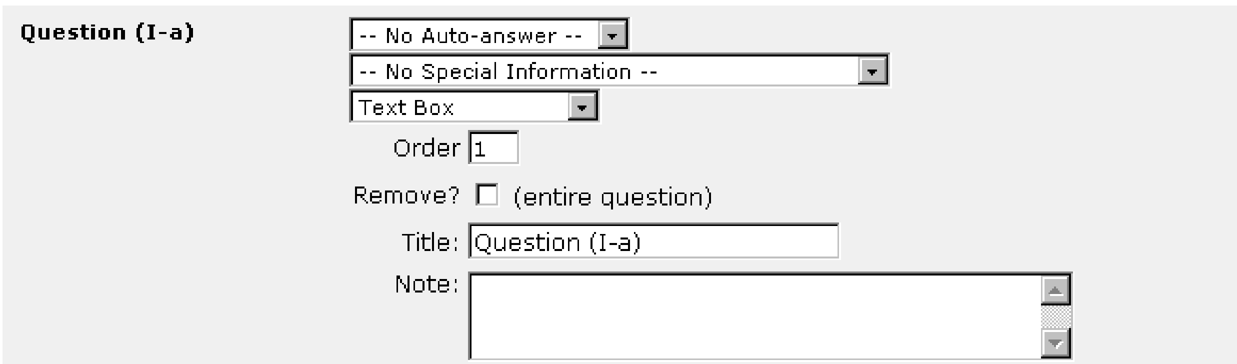


Figure 14-4 Common Question Fields

- **Auto Answer**: this field allows you to choose from a number of values to be automatically filled in, for example User's Name, User's Email Address. MySource can only do this if the user has a MySource account and is logged in. If you select *No Auto Answer*, the question will appear blank.

- **Special Information:** the *Special Information* field is a flag to MySource that the answer to this question has a special meaning. It can have the following values:

  - **User's Name/Firstname/Surname/Email**: if one of these types is chosen for a question, the answers are used in the *From* field for the *Recipient Email*, which is sent when the user clicks *Submit*. Recipient email is discussed in the *Options* tab later in this chapter.

> **TIP: You should set a *User's Name* for a single field, or a *User's Firstname and Surname* field if you are asking separate questions for this information.**

> **TIP: If you have not created questions set as special information, or the user leaves these fields blank, the values in the *Recipient Email* will default to the webmaster details that have been set in the *Config* tab.**

  - **Send a note to these friends' email addresses**: an email will be sent to each of the email addresses entered into this field. The details for the email sent are defined on the *Options* tab, in the *Send to Friends Options* section, which is described later in this chapter.

- **Field Type**: this drop down list indicates the type of question field. In Figure 14-4 above, this is a *Text Box* question. You can change the type of your question by selecting a new item from this drop down list. When you next click on *Commit*, the screen will be updated with the fields appropriate to that question.

- **Order:** this option is the same as *Section Order*, but applies to individual questions within a section.

- **Remove?:** tick this box to delete this question from the form the next time you click on *Commit*.

- **Title:** enter the title for the question in this field.

- **Note:** enter more information on the question in this field (e.g. "This is a compulsory question).

The fields that are presented for the different question types are now discussed. Please note that there are several fields that are common to several question types, and these will be described the first time they appear only.

Text Box Question Fields

The fields that are required for a *Text Box* question type are shown in the diagram below:

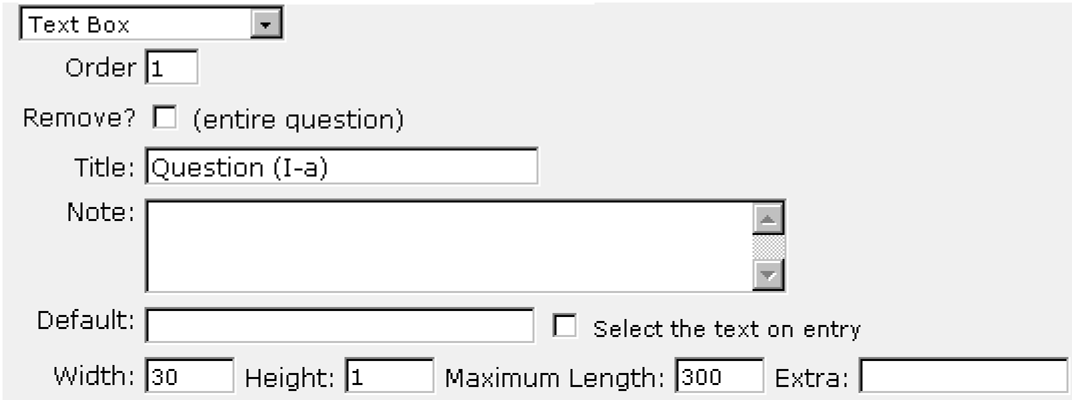


Figure 14-5 Text Box Question Fields

The fields that are specific to the *Text Box* question type are described below:

- **Default:** enter text that will be the default answer for this question in this box.
- **Select the text on entry:** if this box is checked, the cursor will automatically be placed in the text box question when the page is displayed to a user.
- **Width:** specify the width of the text box question on your page. This is measured in characters.
- **Height:** you can specify that this is a multi-line text box question, by entering a value of more than 1 in this field. If you specify a value of 1, this is a single line text box question.
- **Maximum Length**: enter a limit for the number of characters that can be typed into this text box question on your page.
- **Extra**: this field allows you to enter an additional HTML parameter for your text question. For example you may wish to specify “class=smallprint” to reference a style from your stylesheet – please note this is fairly advanced and requires knowledge of HTML.

Drop Down/List Box Question Fields

The fields that are required for a *Dropdown/List Box* question type are shown in the diagram below:

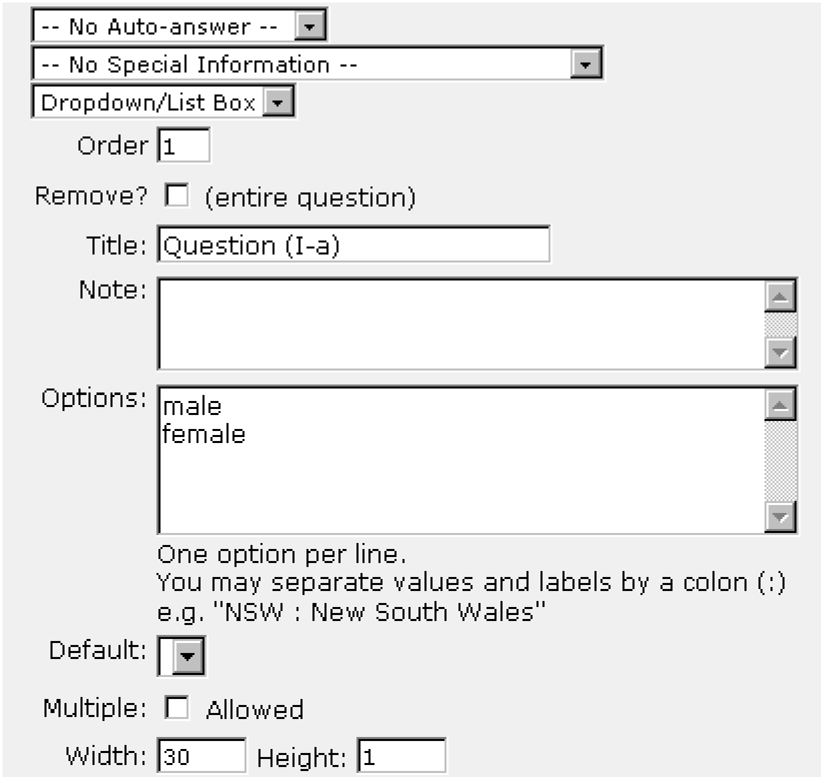


Figure 14-6 Dropdown/List Box fields

Default, Width, Height were discussed in the previous section for the *Text Box* question type. The fields that are specific to the *Dropdown/List Box* question type are discussed below:

- **Options:** enter each option available for the question, one per line.
- **Multiple:** if you tick this box, users will be able to select multiple options from the list provided.

Tickbox Question Fields

The fields that are required for a *Tickbox* question type are shown in the diagram below:

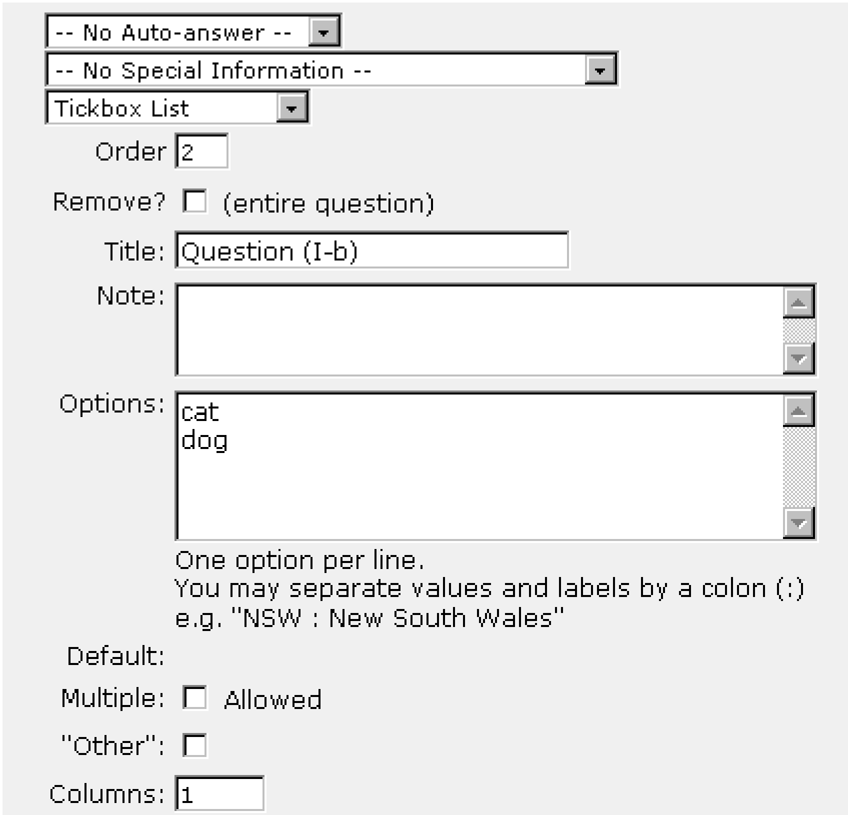


Figure 14-7 Tickbox Question Fields

Options, Default, Multiple were discussed in the previous section. The fields that are specific to the *Tickbox* question type are discussed below:

- **Other:** This provides an "Other" tickbox that the user can select if none of the above options apply. A textbox is automatically provided next to the “Other" option, so that the user can type in any relevant information.

- **Columns:** specify the number of columns used to display your tickbox options.

Date/Time Question Fields

The fields that are required for a *Date/Time* question type are shown in the diagram below:

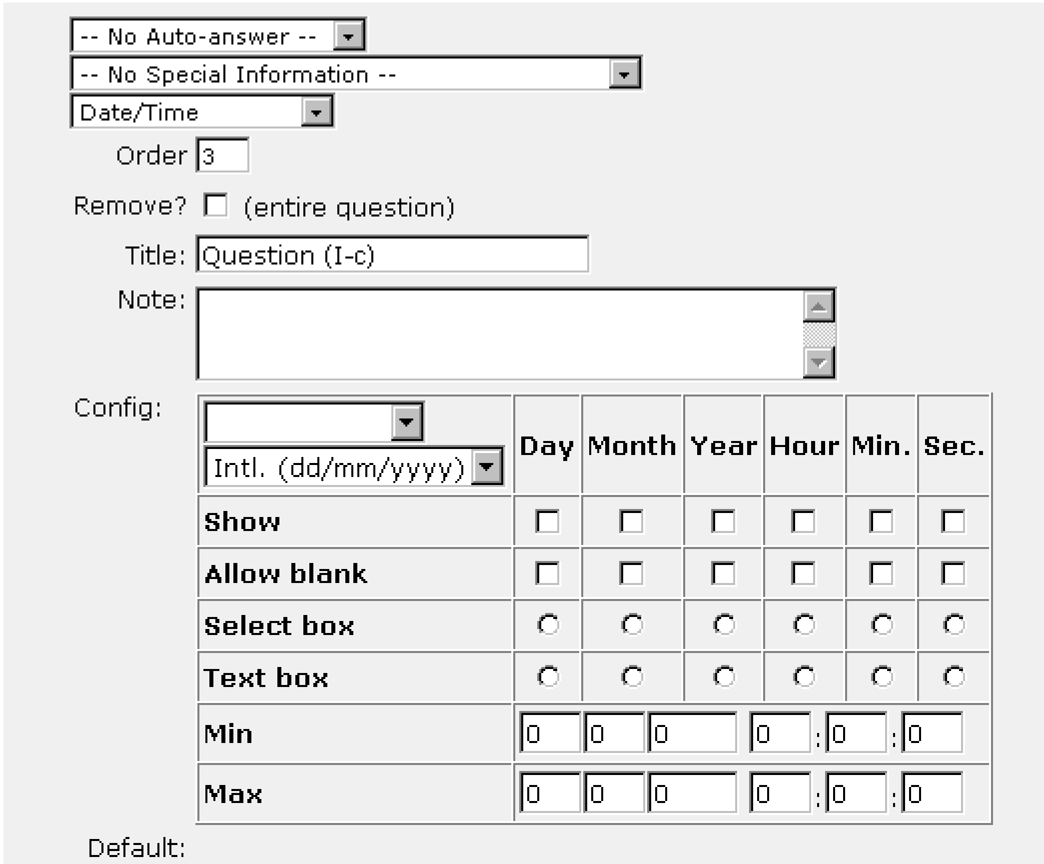


Figure 14-8 Date and Time Question Fields

The fields that are specific to the *Date and Time* question type are discussed below:

- **Config:** this drop down allows you to select blank or *allow "circa".* If you select *allow "circa",* a question will be displayed on your page alongside the date question, which has two options: *blank* and *circa.* This allows your user to indicate that the date entered into the main answer is circa rather than a definite date.

  If you select blank from this drop down list, no additional drop down list appears next to your date.

- **Format:** select the format required for the date entered into this question. You can choose from the international format "dd/mm/yyyy" or the American "mm/dd/yyyy" format.

  The following options are available for each option of *Day*, *Month*, *Year*, *Hour*, *Minute*, *Second*:

- **Show:** select whether to show this component of the date/time.
- **Allow Blank:** select whether this component of the date/time can be left blank.
- **Select/Text box:** these are radio buttons allowing you to choose whether this question appears as a *Text* or *Select* box. If this is set to *Text* the user must type in text, and if this is set to *Select* the user can pick a value from a drop down list.
- **Min:** allows you to set a minimum parameter for this component of the date/time
- **Max:** allows you to set a maximum parameter for this component of the date/time

Email Address Question Fields

The fields that are required for an *Email Address* question type are shown in the diagram below:

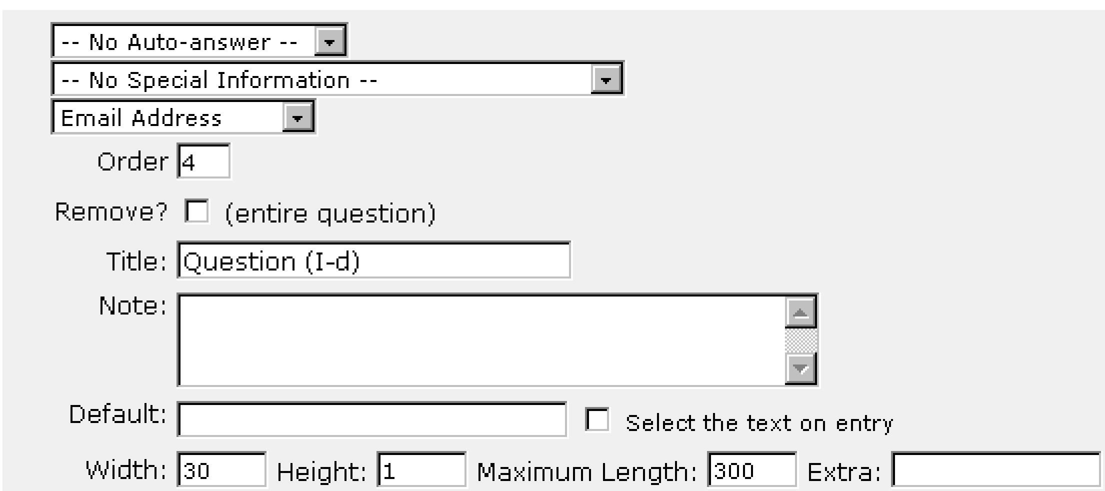


Figure 14-9 Email Address Question Fields

This question type has the same fields as a *Textbox* question. However, if used in conjunction with the *Rule* "This question must be answered correctly", it will validate the email address as having an appropriate structure - only characters and "." are acceptable and it must contain a "@" character.   See the section on *Rules* below for more information.

Country Question Fields

The fields that are required for a *Country* question type are shown in the diagram below:

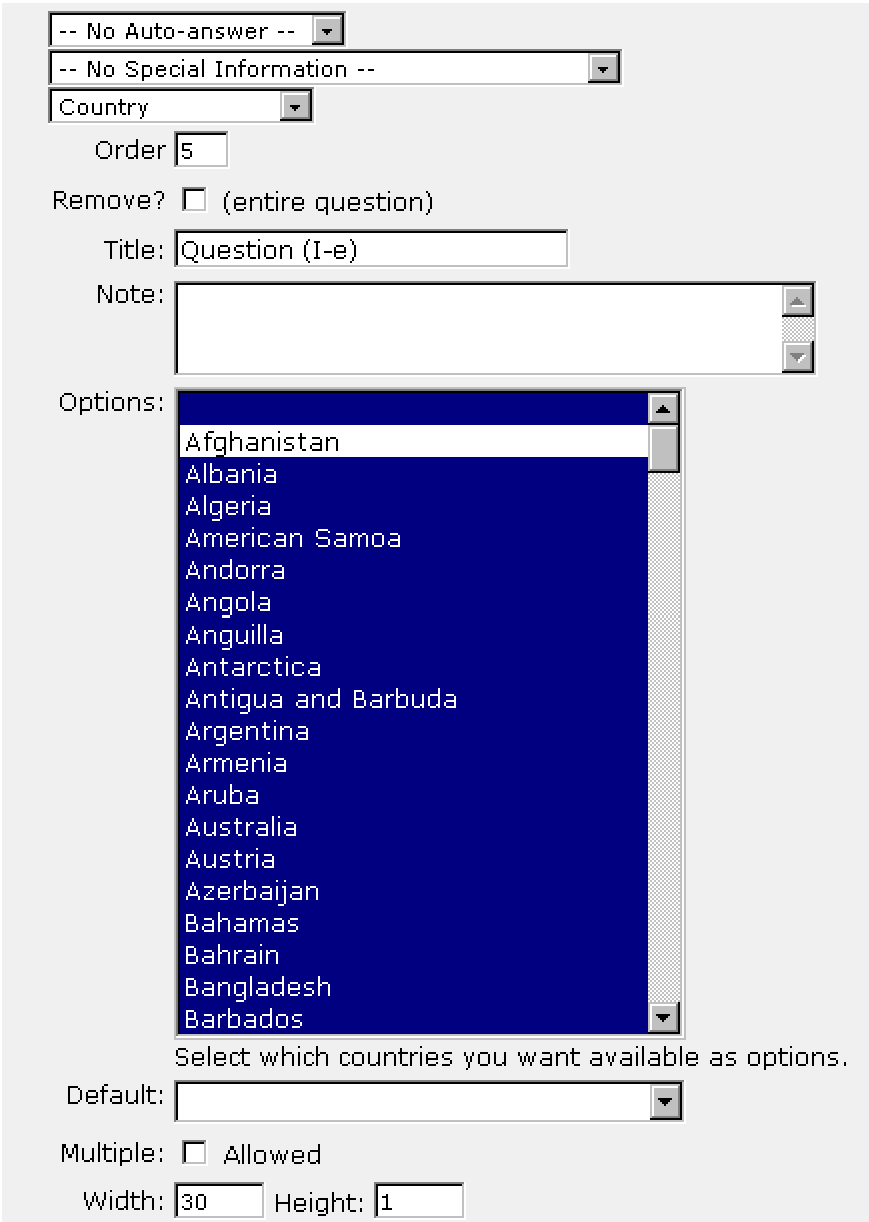


Figure 14-10 Country Question Fields

This question type has the same fields as a *Dropdown/List box* question, but is pre-populated with a list of countries. You can select a subset of these countries to be displayed in your drop down list by clicking on *Ctrl* as you click on each new option, or using your mouse (highlight and drag) to select them all.

Login/Username Question Fields

The fields that are required for a *Login/Username* question type are shown in the diagram below:

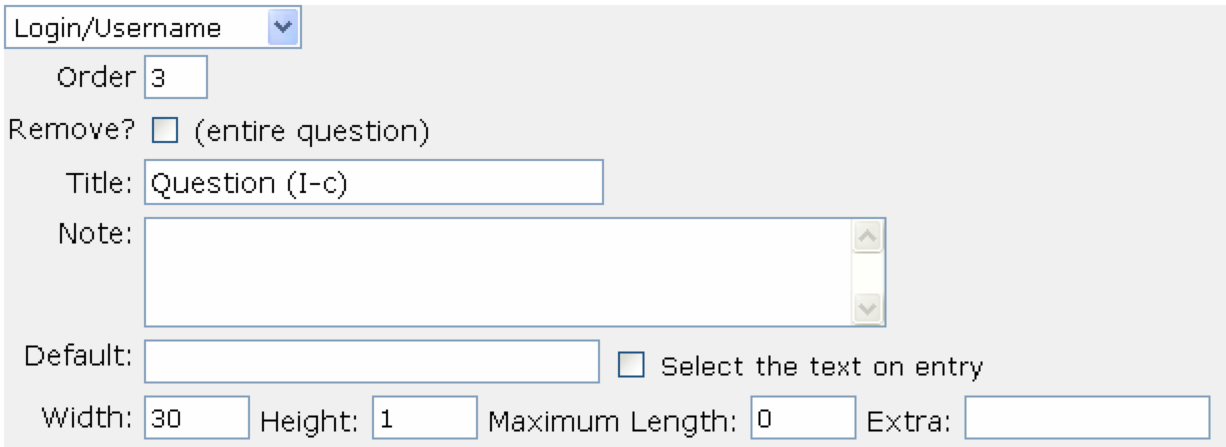


Figure 14-11 Login/Username Question Fields

This question type has the same fields as a *Textbox* question. If it is used in conjunction with the *Rule* "this question must be answered correctly", the username will automatically be validated to be 6 characters or more with no spaces. See the section on *Rules* below for more information.

Password Question Fields

The fields that are required for a *Password* question type are shown in the diagram below:

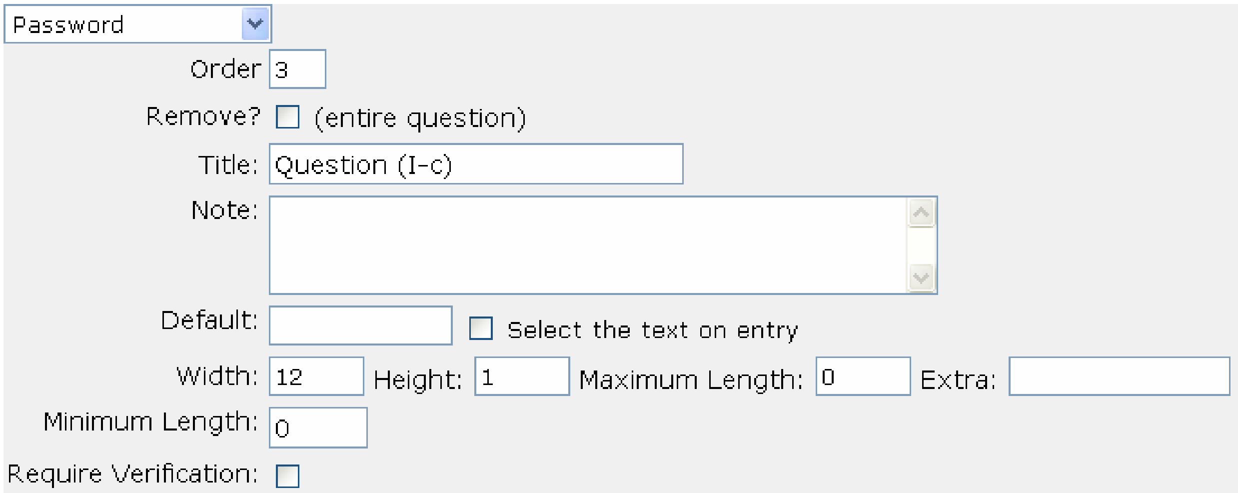


Figure 14-12 Password Question Fields

This question type has the same fields as a *Text Box* question, but anything the user types into the text box will appear displayed as asterisks ("*").

You can specify that a minimum length required for users entering a password, and if you check the *Require Verification* tick box, another password box will appear underneath the first box. The two passwords typed into the boxes must match before the form will be submitted.

Field Upload Question Fields

The fields that are required for a *File Upload* question type are shown in the diagram below:

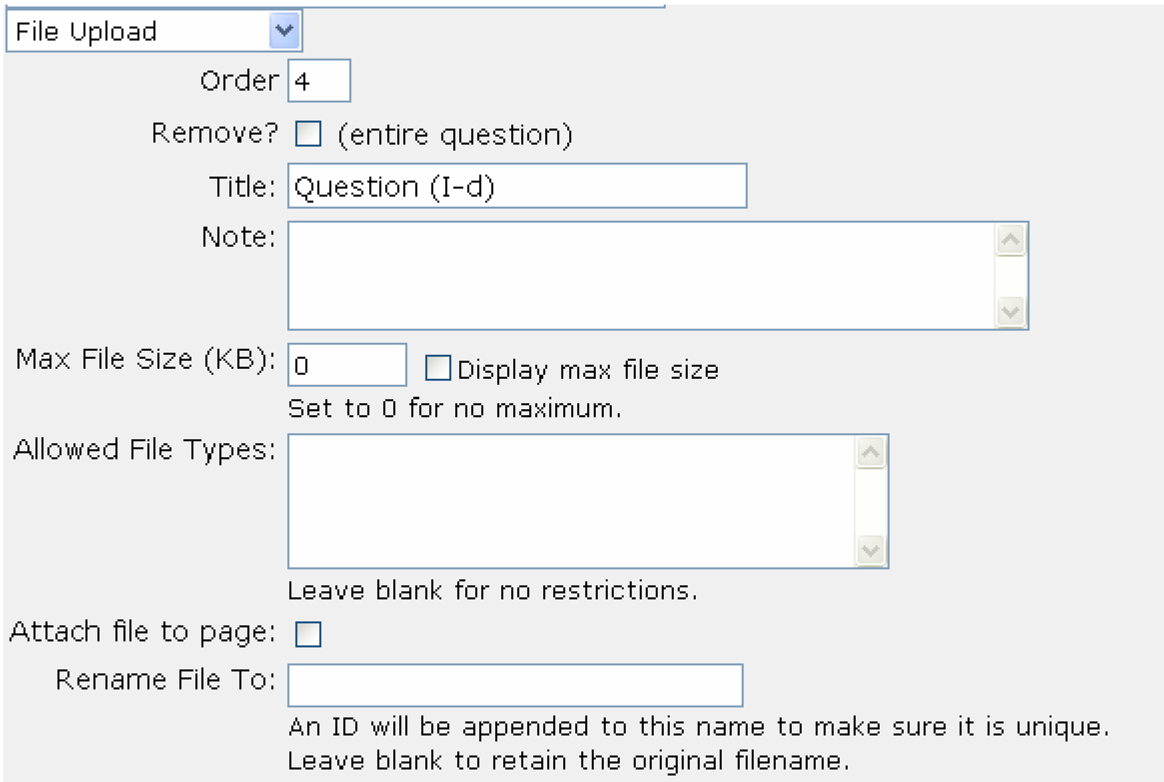


Figure 14-13 File Upload Question Fields

The fields that are specific to the *File Upload* question type are discussed below:

- **Max File Size:** enter the maximum file size for the file to upload. If you do not wish to set a maximum file size, set this field to zero.
- **Display max file size:** check this box to automatically display the maximum file size next to this field.
- **Allowed File Types:** if you wish to limit the types of files that can be uploaded, enter each allowed file type on a different line. For example, enter “doc” for MS Word Documents, “gif” for GIF images. Note that these are case insensitive.
- **Attach file to page:** check this box to list the uploaded file as an attachment to this page in the *Attachments* tab.

TIP: When a user uploads a file to the form, the file is loaded into your MySource system. The *Recipient Email* and the *Submission Log* both contain a hyperlink to this file in the MySource system, allowing you to view the uploaded file.

However, to delete the file from the system, you must check this box to attach the file to the page. You can then go to the *Attachments* tab and delete the uploaded file, as for any other file attachment. It is recommended that you check this box, allowing you to maintain the free disk space on your server.

- **Rename File To:** enter a filename to be given to the file in MySource. MySource appends an ID number to this filename to ensure the filename is unique. If you wish the file to retain the original name set by the user, leave this field blank.

Email List Question Fields

The fields that are required for an *Email List* question type are shown in the diagram below:

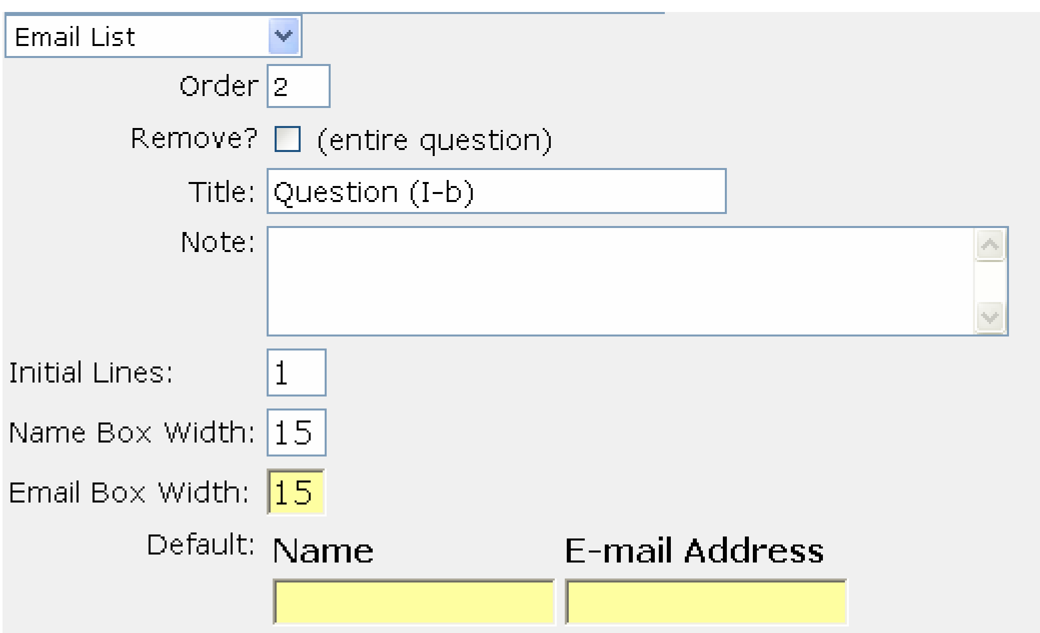


Figure 14-14 Email List Question Fields

The fields that are specific to the *Email List* question type are discussed below:

- **Initial Lines:** enter the number of email list lines that will initially be shown on your form.

TIP: This number of lines will be shown initially, and additional lines will be displayed if the user hits *Return* in the final *E-mail Address* field.

- **Name Box Width:** enter the width for the name box.
- **Email Box Width:** enter the width for the email box.
- **Default:** enter the default values to appear in the name and email address fields.

New Section

To add a new section to your form, enter a title for the section and click on the *Commit* button. A new section is added to your screen showing the fields for the new form section as described above.

Rules

Rules are used to stop people submitting information that is incomplete or incorrect. By default, there are no rules established for a form.

This section at the bottom of the *Form* tab shows the rules you have defined for your form. The diagram below shows one rule entered for Question 1:

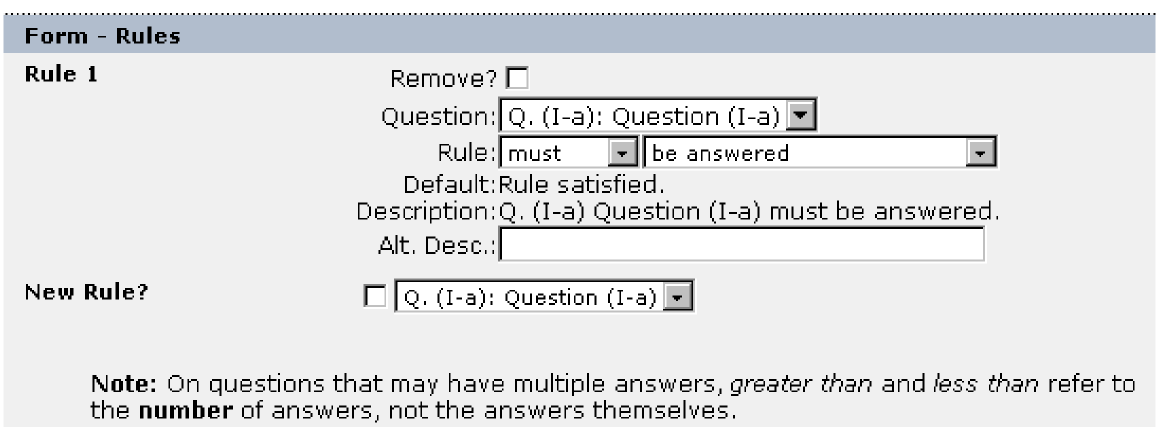


Figure 14-15 Rules

To create a new rule, tick the box next to *New Rule?* and select the question on your form from the drop down list to which the new rule will apply. Click on *Commit*, and a set of criteria that you can use to create your rule is displayed:

- **Remove?:** checking this box will remove the rule the next time the page is committed.

- **Question:** when you first add a rule, you select a question to which the rule is to apply. You can change the question to which this rule applies at any time, by selecting the appropriate question from this drop down list.

- **Rule:** in the first drop down list, select whether the answer given in the form *Must* or *Must Not* conform to the specified condition. Select the condition for the rule from second drop down list.

  The condition can be selected from one of the following:

  - **Be answered:** select this option to specify that the form will not be submitted if this question is left blank.

  - **Be answered correctly:** select this option to specify that the form will not be submitted if this question is not answered correctly. This is used for the *Email Address* and *Login/Username* question types for which the format of a valid answer is pre-determined:

    - An email address must contain characters and "." characters and a single "@" character

    - a login must contain alphanumeric characters only.

    Note: A question to which this rule condition has been applied must not be left blank.

  - **Be correct, if answered:** select this option to specify that the question may be answered or not, but if it is answered, it must be answered correctly – as specified in the previous option.

  - **Be a number:** select this option to specify that the form will not be submitted if the answer contains characters other than 0-9.

For the following fields, if you select the specified value in the *Rule* drop down list, additional fields are displayed allowing you to enter additional data for the rule when you click on *Commit*. These additional fields are also detailed in the explanations below:

- **Equal:** select this option to specify that the answer must be equal to a particular value. You can enter a value that the answer must be equal to into the *Value* field, or select another question in the form that the value must be equal to.
- **Contain:** select this option to specify that the answer must contain a particular value. Enter a value that the answer must contain into the *Value* field.
- **Be found in:** select this option to specify that the answer must be found in a particular value. Enter the value that the answer must be found in into the *Value* field.
- **Be greater than:** select this option to specify that the answer must be greater than a particular value. Enter the value that the answer must be greater than into the *Value* field.
- **Be less than:** select this option to specify that the answer must be less than a particular value. Enter the value that the answer must be less than into the *Value* field.
- **Match the extended regexp:** select this option to specify that the answer must match this regular expression. Enter the value that the answer must be equal to into the *Value* field.

TIP: A regular expression allows you to define a pattern which the answer must match – for example, you could specify "*apples" to specify that the answer may contain any number of characters followed by the string "apples".

- **Default Description:** this field shows you the description that is displayed if a user's input does not comply with any of the rules. The default description is of the format:

  Rule Broken: Q (a) (Question Name) (must/must not) (match rule).

For example, in Figure 14-15 above, the default description is "Rule Broken: Question (I-a) must be answered".

- **Alt. Desc:** this field allows you to provide an alternative description to be used instead of the default description, shown above. Enter the new description into the field.

Selective Emails

If you have a question which is of the type *Dropdown/List Box* or *Tickbox List*, the following section will be displayed at the bottom of the *Form* tab:

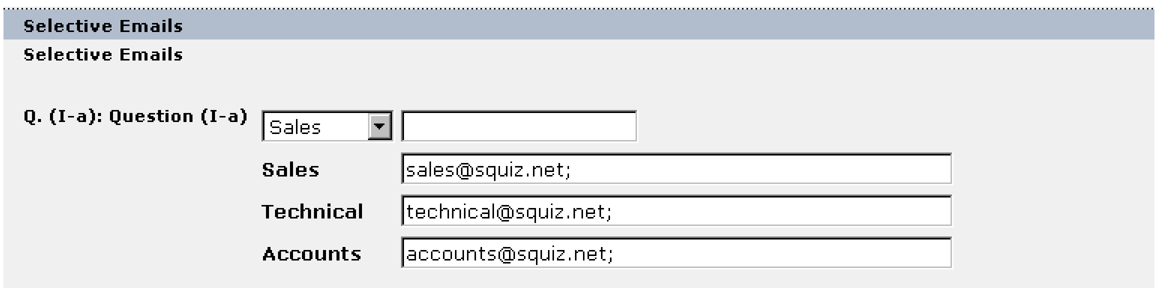


Figure 14-16 Selective Emails

The *Dropdown/List Box* or *Tickbox List* question types have preset options for the answers, and you can use this section to specify that the form submissions are sent to different people based on the answer to the question.

In the example above the form will be sent to "sales@squiz.net" if the user selects "Sales", or to "technical@squiz.net" if the user selects "Technical" or to "accounts@squiz.net" if the user selects "Accounts". This way the user's enquiry can be answered by the correct department without setting up multiple forms.

TIP: Select an option from the drop down list, and enter the appropriate email address or addresses in the text box, separating email addresses with a semi-colon.

Select *Commit* and the option and email addresses are added to the list of currently set selective emails. You can then change the email addresses in the text box at any time.

Formelements Keyword

The *Formelements Keyword* section is displayed at the bottom of the *Form* tab:

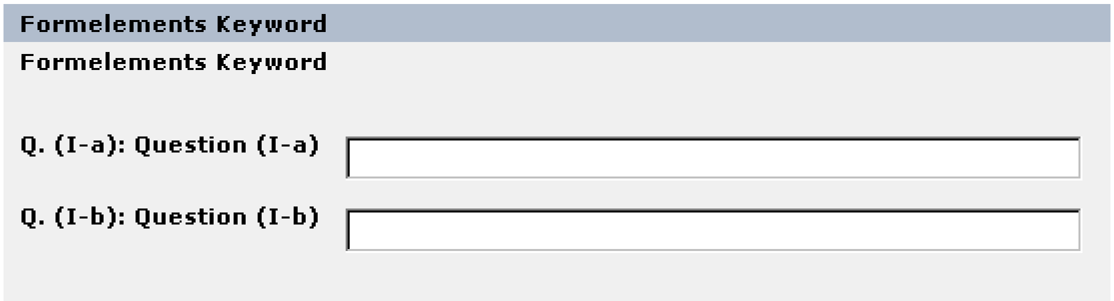


Figure 14-17 Formelements Keyword

A text box is displayed for each question that you have created. You can enter a keyword here so that the answer can be referred to in the body copy of your thank you message. The thank you message is discussed below on the Options tab, and is the copy that is shown once the user has clicked Submit.

An example of the use of *Formelement Keywords* is if you have a question that asks the user to enter their name, you could enter a *Formelement Keyword* of “Name”. You could then enter a thank you message copy of

> “Thank you %name%, your order has been submitted.”

Options Tab

In the previous section we discussed how to use the *Form* tab of the *Contents: Custom Form* tab to define the questions for your form, and the rules to be applied to the answers. In this section we describe the *Options* tab which allows you to define some of the options for your form, such as whether it should be broken down into pages, and who should be emailed with the answers.

The options are divided into the following sections, each of which is explained below:

- General
- Recipient Email
- Receipt Email
- Send to Friends

General Options

The *General Options* section is shown in the figure below:

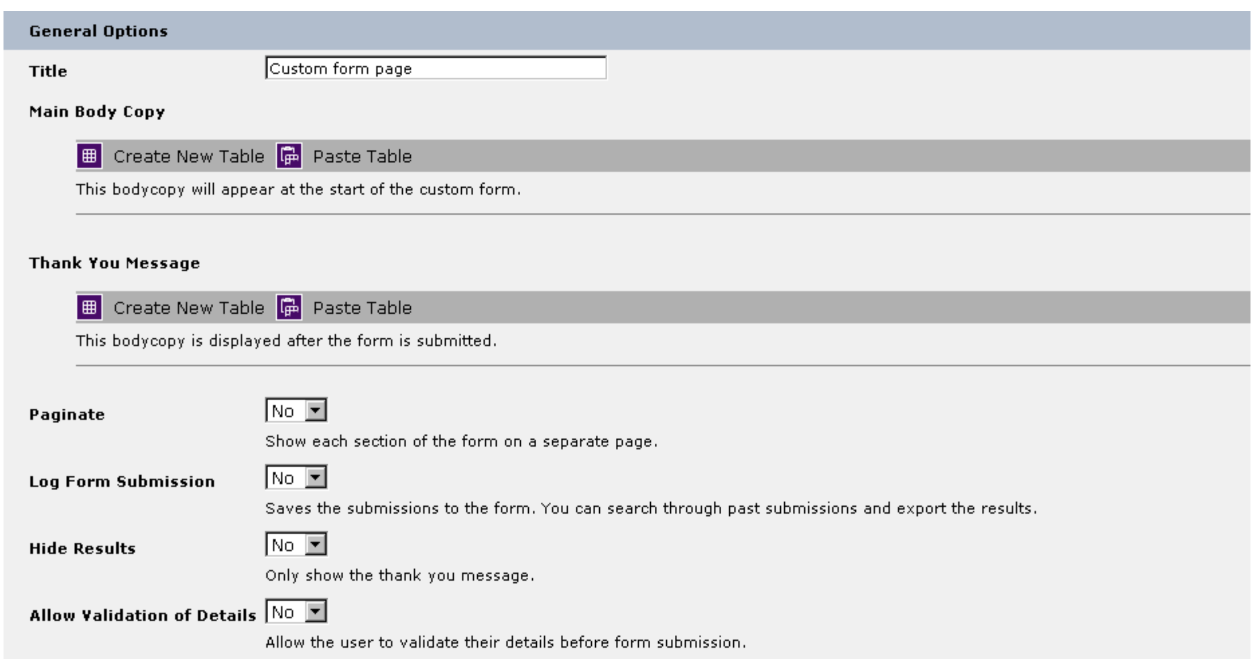


Figure 14-18 General Options

- **Title**: enter the title for your form page into this text box. This is not printed on your page unless it is coded to do so in your site design.

- **Main Body Copy**: enter the body copy to be displayed at the top of your form page.

TIP: You enter both the body copy for your form page and the thank you message copy using tables and the WYSIWYG editor, just as you do for the contents of a standard page. Please refer to Chapter 8 if you need a refresher on this.

- **Thank You Message**: enter the copy to be displayed as a thank you message after the user has clicked on *Submit*.

TIP: If *Hide Results* is set to *Yes*, only the thank you message is shown after *Submit* is clicked. If *Hide Results* is set to *No*, the thank you message is shown at the top of the page as well as the form answers.

- **Paginate**: select *Yes* to show the different sections you have defined on a separate page. *Next* and *Previous* buttons are automatically displayed on your pages. If you select *No*, your sections will be displayed on a single page with a scrollbar if necessary.

TIP: The form uses the sections you have defined to determine where the page breaks should be. If your form has only one section, the *Paginate* option has no effect.

- **Log Form Submission**: select *Yes* to log the form submission along with all of the answers. If you select *No*, the form submission will not be logged.

TIP: Submissions are logged to the MySource database. You can export the submission log to CSV or XML format on the *Submission Log* tab, which is described later in this chapter.

- **Hide Results**: select *Yes* to remove the form questions and display only the thank you message after the user has clicked *Submit*. If you select *No*, the entered answers remain displayed on the page after the user has clicked on *Submit*.

- **Allow Validation of Details**: select *Yes* to allow the user the option to go back to the form and validate their details. In this case, a *Validation Body Copy* area is added to the *General Options* section at the top. After the user clicks on *Submit*, a page is displayed showing the *Validation Body Copy,* and a *Back* and a *Submit* button.

  If you select *No*, the form is submitted as soon as the *Submit* button is clicked.

Recipient Email Options

The *Recipient Email* options section allows you to define the details for an email to be sent to your staff, when the *Submit* button is clicked. For example, you may wish the sales department to receive an email when an order form is submitted. This section is shown in the figure below:

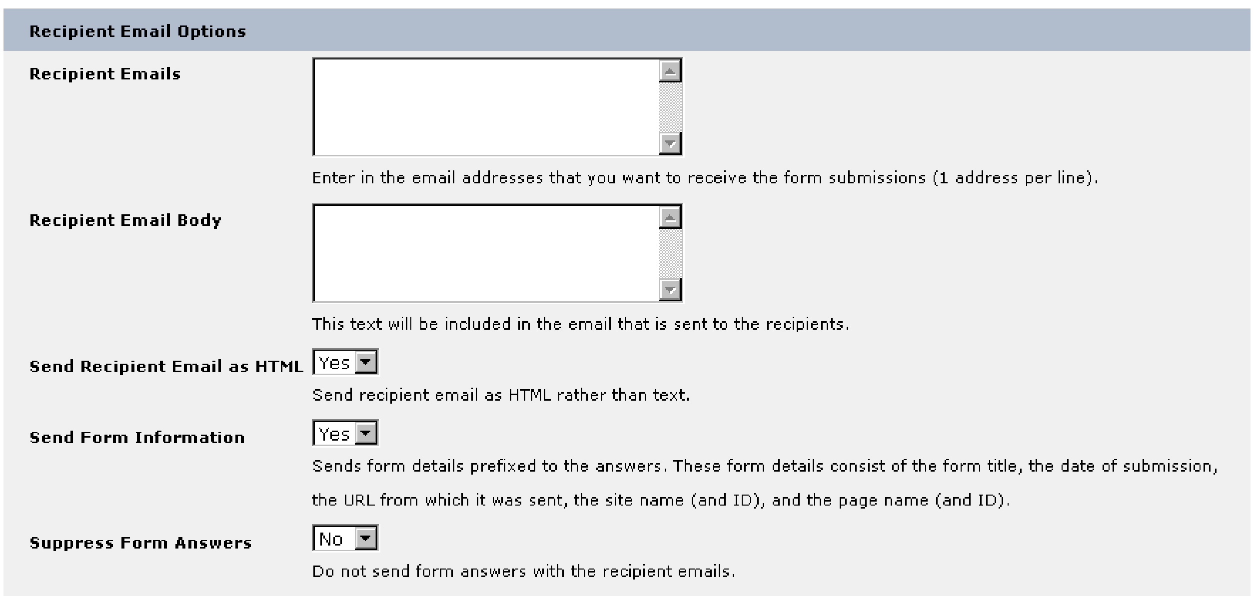


Figure 14-19 Recipient Email Options

- **Recipient Emails**: enter the addresses of people to be emailed when the user clicks *Submit* on your form. Enter each email address on a new line.

- **Recipient Email Body**: enter the body of the email to be sent in addition to the answers from the form fields.

- **Send Recipient Email as HTML**: select *Yes* to send the email as HTML, and *No* to send it as plain text.

- **Send Form Information**: select *Yes* to send the following form information in the email: title, submission date, sending URL, site name and ID, page name and ID. Select *No* to omit the form information from the email.

- **Suppress Form Answers**: select *No* to send the form answers in the email, and *Yes* to suppress them.

Receipt Email Options

The *Receipt Email Options* section allows you to define an email to be sent back to the user, when the *Submit* button is clicked. The section is shown in the figure below:

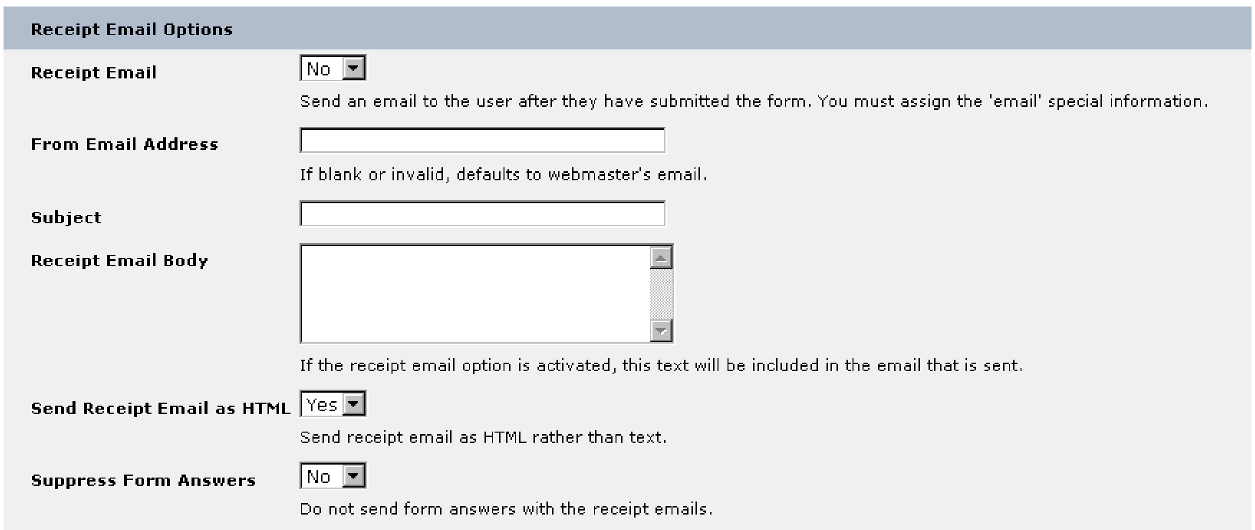


Figure 14-20 Receipt Email Options

- **Receipt Email**: select *Yes* in this drop down list to send an email to the user with a copy of the answers, after the *Submit* button is clicked. If you select *No*, an email will not be sent.

- **From Email Address**: enter the email address that the email will be sent from.

> **TIP: If you do not specify an email address in this field, the email address of the webmaster will be used.**

- **Subject**: enter the subject title to be used for the email.

- **Receipt Email Body**: enter the body of the email to be sent in addition to the answers to the form questions.

- **Send Receipt as HTML**: select *Yes* to send the email as HTML, or *No* to send it as plain text.

- **Suppress Form Answers**: select *No* to send the form answers in the email, and *Yes* to suppress them.

Send to Friends Options

The *Send To Friends* section allows you to define an email to be sent to the user's friends, when the *Submit* button is clicked. If the form contains a question that has the *Special Information* option set to "send a note to these friends' email addresses", all the email addresses entered into that field will receive an email when the form is submitted.

> **TIP: The *Special Information* option is set for a question on the *Form* tab, which is described earlier in this chapter under *Sections*.**

The section is shown in the figure below:

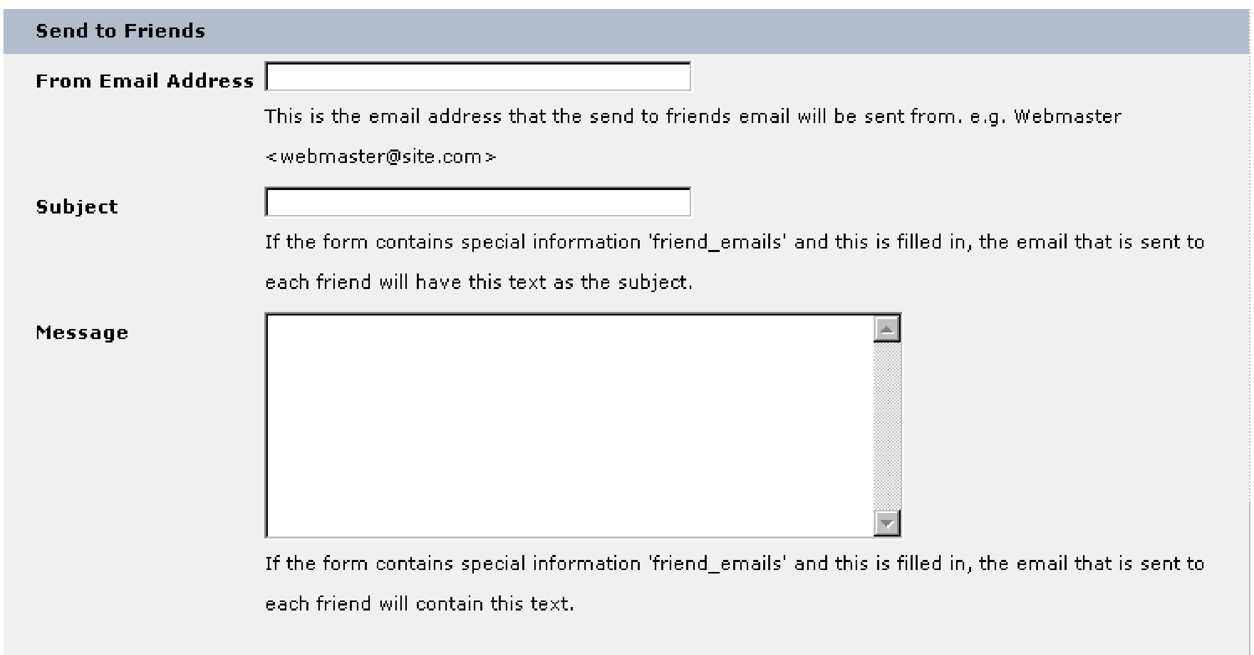


Figure 14-21 Send To Friends Options

- **From Email Address:** enter the email address from which the *Send To A Friend* email will be sent. e.g. 'Webmaster <webmaster@site.com>'.

- **Subject:** enter the subject for the *Send To A Friend* email.

- **Message:** enter the text for the *Send To A Friend* email.

Format Tab

The *Format* tab allows you to define the layout of your form. You can define a complex table structure, just as you do for the body copy of a standard page, and then use keyword replacements to reference all of the elements of your form (i.e: questions, section titles, etc) using the WYSIWYG editor.

TIP: You do not have to use the format tab when creating a form. Whilst you can achieve greater control of the layout of your form, it can take you considerably longer to set up the form.

The *Format* tab is shown in the diagram below:

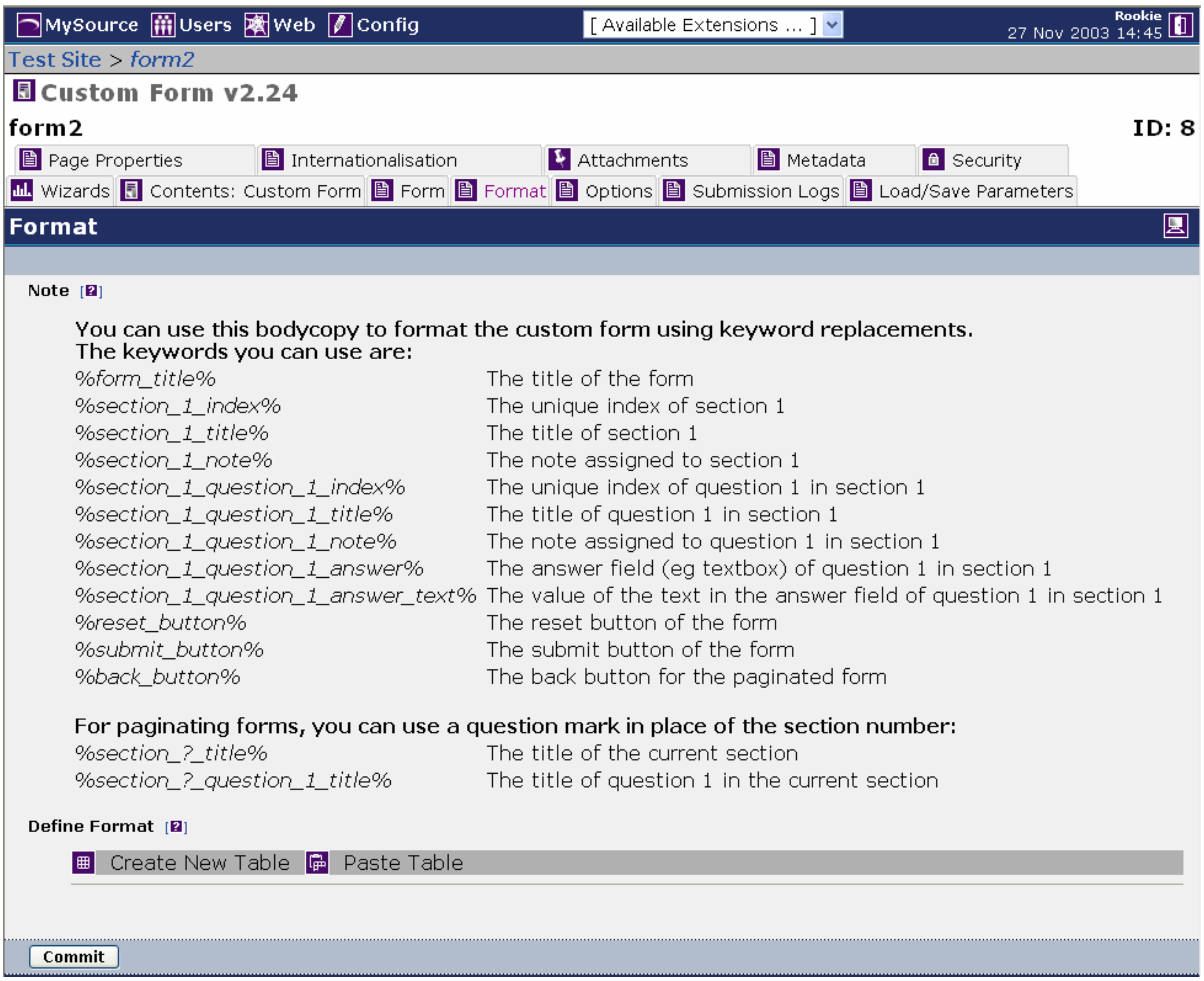


Figure 14-22 Format Tab

Note

This section shows the keywords you can use in the body copy of your form, to reference the elements of your form that you defined on the *Form* and *Options* tab described previously in this chapter.

> **TIP: A set of keywords will be available for each section and question that you have created – that is, you can use the following keywords for Section X, Question Y:**
>
> | | |
> |---|---|
> | **%section_X_index%** | **%section_X_question_Y_title%** |
> | **%section_X_title%** | **%section_X_question_Y_note%** |
> | **%section_X_note%** | **%section_X_question_Y_answer%** |
> | **%section_X_question_Y_index%** | **%section_X_question_Y_answer_text%** |

As an example, let's consider a form that contains one section with four questions:

- First Name
- Surname
- Email
- Comments

To reference the text for your first question (First Name), you can use the keyword replacement:

%section_1_question_1_title%

To reference the text box where people type in their answer, you use the keyword replacement:

%section_1_question_1_answer%

You can reference the other fields in a similar manner.

Define Format

This section allows you to create one or more tables to define the layout of your form. You do this in exactly the same way as you did for a standard page, as described in Chapter 8 previously.

> **TIP: Define the questions for your form using the *Form* tab initially, preview it and then print the page out so that you can reference the different section and question numbers easily.**

Workshop 21 at the end of this chapter takes you through defining a complex layout for an example form.

Submission Logs Tab

In this section we describe the *Submission Logs* tab which allows you to define the logs which are kept of user submissions using this form. From this tab, you can either export all submissions made through the form into a CSV or XML, or view individual log submissions.

The *Submission Logs* tab is shown in the diagram below:

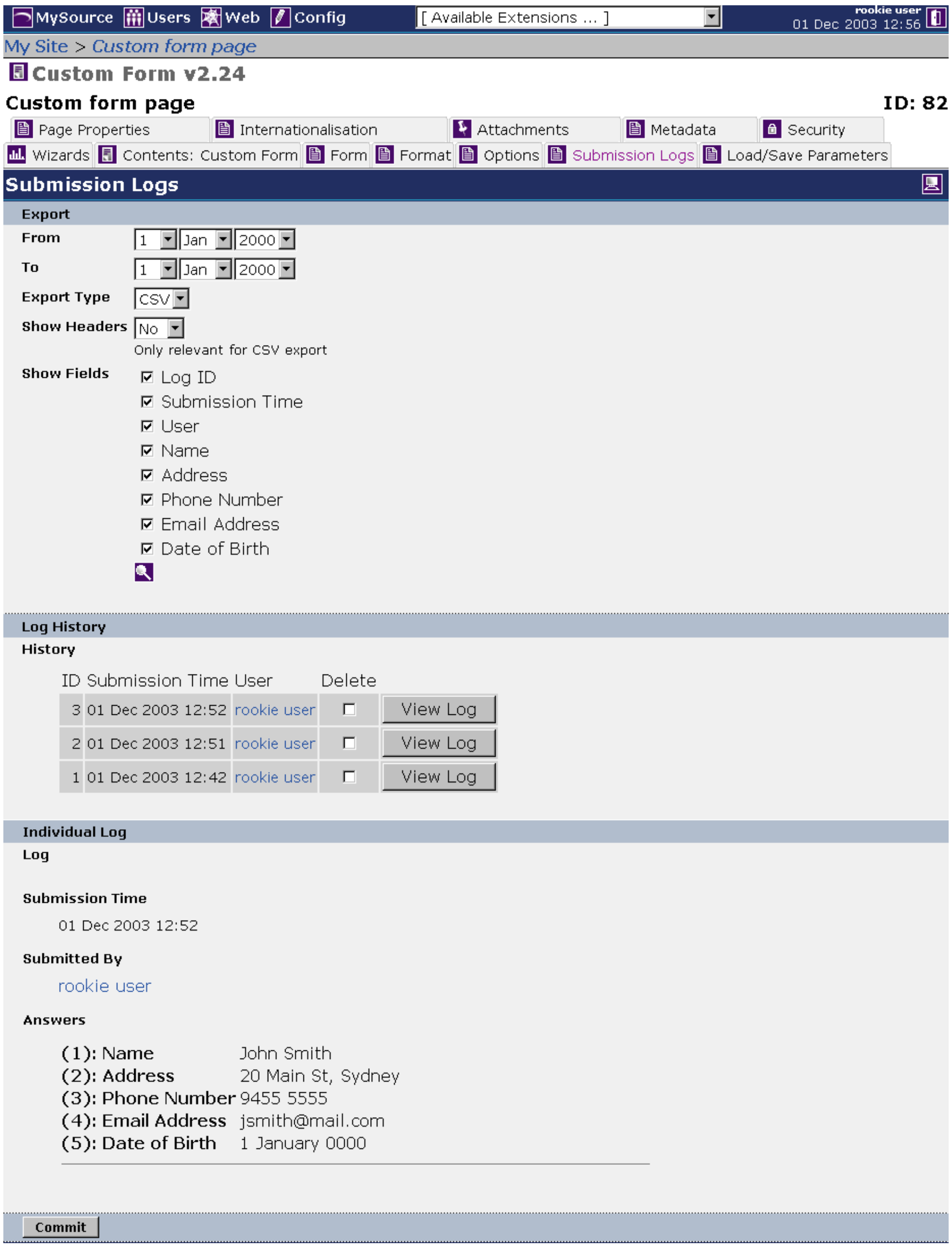


Figure 14-23 Submission Logs Tab

Export

- **From/To:** select the *To* and *From* dates that define the period for the submissions to be included in the export. Leave the *From* date blank if you want to include all submissions.

- **Export Type:** select the format of export file to be created:

  - *CSV* is a comma separated file, which you can then open up in Microsoft Excel or a similar spreadsheet program.

  - *XML* will export your data into a format that is readable by a number of other XML compliant applications.

- **Show Headers:** this option is only relevant for an export to CSV format. Set this option to *Yes* to give the columns of information in the CSV file headers describing the contents of the column. Set this option to *No* to omit the headers.

- **Show Fields:** by default, all fields in the form are selected for inclusion in the export file. Uncheck the box next to any options that you do not wish to export.

Log History

This section displays the individual submissions made through the form.

- **ID:** this is the identifier of the submission made.

- **Submission Time:** this is the time of the submission.

- **User:** this is the user who submitted the form, if the user has logged into a MySource account (either in the MySource system, or as a user in a member's area).

> **TIP: If no user information is available to MySource, the user will appear as "Anonymous".**

- **Delete**: check this box to delete this submission log entry when you click on the *Commit* button.

- **View Log**: click this button to view the details of the individual log in the section below.

Individual Log

This section displays the details of the chosen log from *Log History*.

- **Submission Time:** this is the time of the submission**.**
- **Submission By:** this is the user who submitted the form, if the user has logged into a MySource account (either in the MySource system, or as a user in a member's area).
- **Answers:** this section shows the question title and the answer given to each of the questions on the form.

Commit

When you click on the *Commit* button, a dialog box will appear prompting you to select where you would like to save your export file.

Load/Save Parameters Tab

The *Load/Save Parameters* tab allows you to save the settings for your custom form to a file with file extension .param. You can then upload this file to the load/save parameters tab of another custom form page template.

TIP: This can be used to copy forms across separate MySource systems, or if you have several forms that are similar, you can change specific sections of the form once and upload them to the other forms.

You can save your parameters either internally within MySource (this is referred to as loading/saving to an account), or to an external file (this is referred to as loading/downloading).

Load Parameters

The *Load* section of this tab is shown in the diagram below:

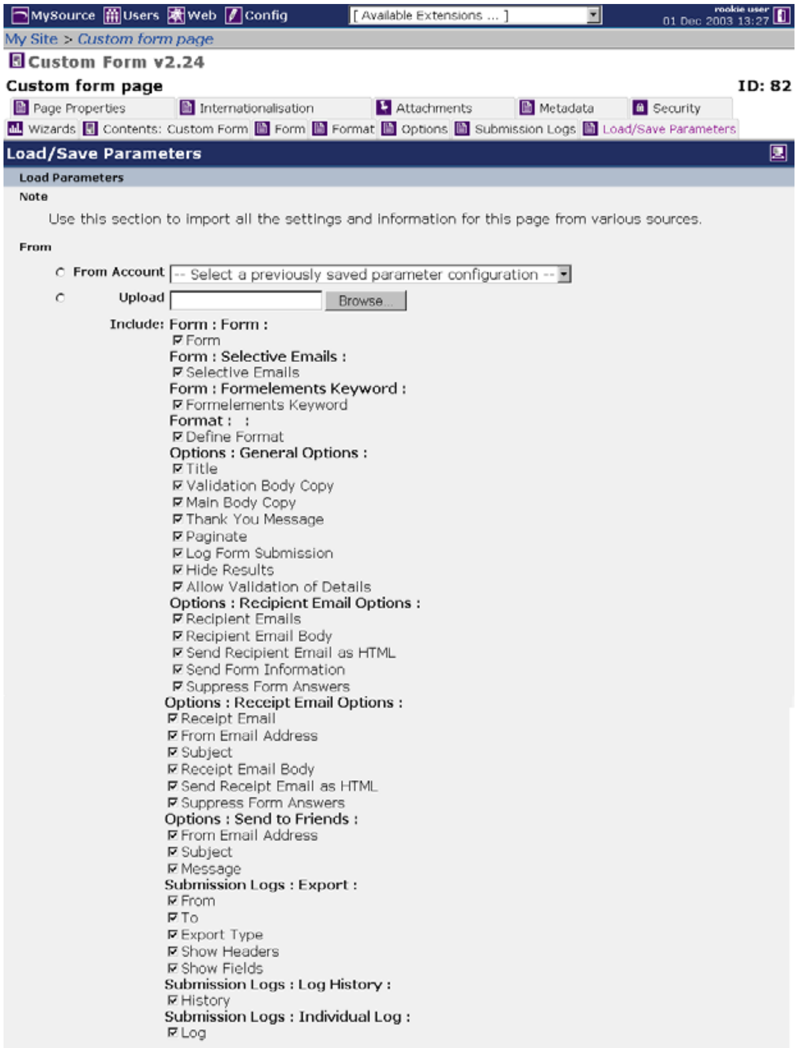


Figure 14-24 Load Parameters

- **From Account:** this drop down list shows each of the previous saves to your account. Select the account you wish to upload.
- **Upload:** click on the *Browse* button to locate the previously saved file to upload. When you click on the *Commit* button, the settings in this file are uploaded.
- **Include:** as you can see in Figure 14-24 Load Parameters above, a checkbox exists for every section of every tab on your form. Tick the box to load the specified section of settings to your form.

Save Parameters

The *Save* section of this tab is shown in the diagram below:

Save Parameters

Note

Use this section to export all the settings and information for this page.

To

○ **To Account** 82_2003-12-01 - Name

○ **Download** 82_2003-12-01 - Filename

Include: Form : Form :
- ☑ Form

Form : Selective Emails :
- ☑ Selective Emails

Form : Formelements Keyword :
- ☑ Formelements Keyword

Format : :
- ☑ Define Format

Options : General Options :
- ☑ Title
- ☑ Validation Body Copy
- ☑ Main Body Copy
- ☑ Thank You Message
- ☑ Paginate
- ☑ Log Form Submission
- ☑ Hide Results
- ☑ Allow Validation of Details

Options : Recipient Email Options :
- ☑ Recipient Emails
- ☑ Recipient Email Body
- ☑ Send Recipient Email as HTML
- ☑ Send Form Information
- ☑ Suppress Form Answers

Options : Receipt Email Options :
- ☑ Receipt Email
- ☑ From Email Address
- ☑ Subject
- ☑ Receipt Email Body
- ☑ Send Receipt Email as HTML
- ☑ Suppress Form Answers

Options : Send to Friends :
- ☑ From Email Address
- ☑ Subject
- ☑ Message

Submission Logs : Export :
- ☑ From
- ☑ To
- ☑ Export Type
- ☑ Show Headers
- ☑ Show Fields

Submission Logs : Log History :
- ☑ History

Submission Logs : Individual Log :
- ☑ Log

Commit

Figure 14-25 Save Parameters

- **To Account:** enter a name for the account to which your settings are to be saved within MySource. The default account name comprises your account ID, followed by the date.

> **TIP: If you want to save your settings to your account more than on a particular date, change the account name by adding a suffix for example. If you use the name of an existing account it will be overwritten.**

- **Download:** type in the name of the file to which to download your settings.

> **TIP: MySource saves your settings using this filename, and the suffix ".param".**

When you click on the *Commit* button, you will be prompted to specify whether you want to open the file, or save it. If you select *Save*, you are prompted to select the directory into which the file is saved. Click *Save* to save the settings.

- **Include:** as you can see in Figure 14-25 Save Parameters above, a checkbox exists for every section of every tab on your form. Tick the box to save the specified section of settings from your form.

Workshop 20 Defining a Simple Form

This workshop takes you through the process of creating a simple "Contact Us" form, which contains eight simple questions. The "Contact Us" form will have a simple layout, and we will not use the *Format* tab during this workshop.

The "Contact Us" form we will create is as follows:

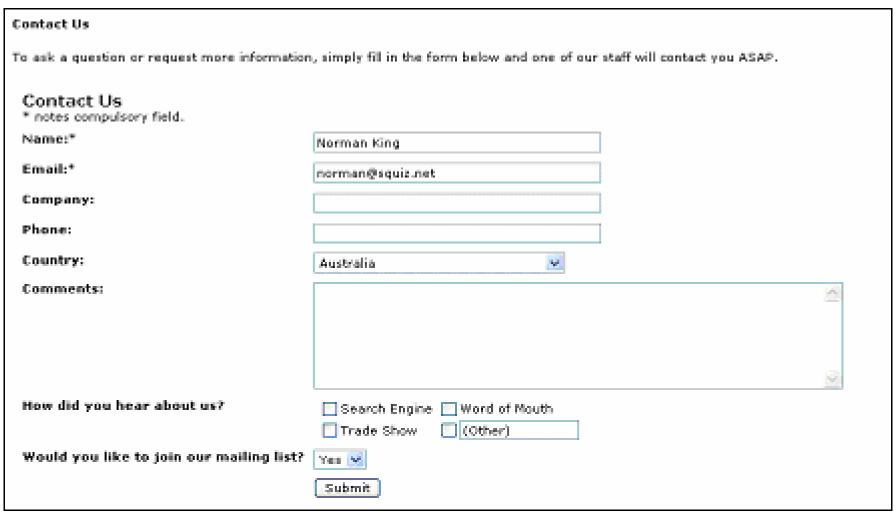


Figure 14-26 Simple Custom Form

1. Create a page in your site and choose *Custom Form* from the *Page Template* drop down list.

Firstly we will set up the options for your form:

2. Click on the *Options* tab.

3. Enter some text for the *Main Body Copy* to appear at the top of the form, and a *Thank You Message* to appear when the user has pressed *Submit*.

4. Make sure *Paginate*, and *Allow Validation of Details* are set to *No*.

5. Set *Hide Results* and *Log Form Submissions* to *Yes*.

6. Enter your email address in the *Recipient Emails* section so that you receive an email when a user presses *Submit*. Leave the remaining options in this section as they are.

7. In the *Receipt Email Options* section, set *Receipt Email* to *No* so that the user doesn't receive an email when they click on *Submit*. Leave all remaining options as they are.

Now let's add questions to the form:

8. Click on the *Form* tab.

9. Under the *Form – Details* section, uncheck the *show?* check box for *Form Title*, *Section Index* and *Question Index*. Leave the other settings in this section as they are.

10. In *Form – Section I*, enter "Contact Us" for the *Section Title* and "* notes compulsory field." for the *Section Note*.

11. Go to the *More Questions* field and select "8" from the first drop down list, and "Text Box" from the second drop down list. Click *Commit* to add the questions.

12. For "Question I-a", set the *Auto Answer* drop down list to "User's Name", to automatically place the user's name in this field. Set the *Special Information* drop down list to "User's Name" to flag the answer to this question as a user name – this will appear in the *Recipient Email* that you receive.

13. Change the *Title* to "Name:*". Leave all other settings for "Question I-a" as they are.

14. For "Question I-b", set the *Auto Answer* drop down list to "User's Email". Set the *Special Information* drop down list to "User's Email". Change the *Field Type* drop down list from "Text Box" to "Email Address". Change the *Title* to "Email:*". Leave all other settings for "Question I-b" as they are.

15. For "Question I-c", change the *Title* to "Company:". Leave all other settings for "Question I-c" as they are.

16. For "Question I-d", change the *Title* to "Phone:". Leave all other settings for "Question I-d" as they are.

17. For "Question I-e", change the *Field Type* drop down list from "Text Box" to "Country". Change the *Title* to "Country:". Leave all other settings for "Question I-e" as they are.

18. For "Question I-f", change the *Title* to "Comments:". Set the *Width*, *Height* and *Maximum Length* to be "90", "7" and "3000" respectively. Leave all other settings for "Question I-f" as they are.

19. For "Question I-g", change the *Field Type* drop down list from "Text Box" to "Tickbox List". Change the *Title* to "How did you hear about us?". Leave all other settings for "Question I-g" as they are.

20. For "Question I-h", change the *Field Type* drop down list from "Text Box" to "Dropdown/List Box". Change the *Title* to read "Would you like to join our mailing list?". Leave all other settings for "Question I-h" as they are.

21. Click on *Commit*, and further fields will be added for the non-text box questions.

22. For "Question I-e", choose "Australia" from the *Default* drop down list.

23. In "Question I-g", add "Search Engine", "Word of Mouth" and "Trade Show" to the *Options* drop down. Check the *Multiple Allowed* and *Other* tickboxes. Set *Columns* to "2".

24. In "Question I-h", add "Yes" and "No" to the *Options* drop down list. Click on *Commit*.

Now let's add some rules to the questions:

25. Go to the *Form - Rules* section near the bottom of the page, to add some rules. Check the *New Rule?* box with the drop down list next to it set to "Q.(i-a): Name:*". Click on *Commit*, and the fields for the new rule appear.

26. Check the *New Rule?* box with the drop down list next to it set to "Q.(i-b): Email:*". Click on *Commit* to show the fields for the new rule.

27. For "Rule 1", make sure that the *Rule* drop down lists are set to "must" and "be answered". The *Alt. Desc.:* should read "Please enter your name".

28. For "Rule 2", make sure that the rule drop down lists are set to "must" and "be answered correctly". The *Alt. Desc.:* should read "Please enter a valid email address". Click on *Commit*.

29. Now preview the page and test your form as follows:

– Your body copy appears at the top of the page.

– Your user name and email address are automatically filled into the *Name* and *Email* question.

– Australia appears as default in the *Country* question.

– You can select multiple options for the *How did you hear about us?* question.

– Your thank you message is displayed when you click on *Submit.*

– You receive a recipient email from your MySource account.

Workshop 21 Adding a Complex Layout to a Form

This workshop builds on the simple contact us form we created in the previous workshop, We go on to use the *Format* tab to define a more complex layout for a simple form containing 8 questions.

The “Contact Us” form we will create is as follows:

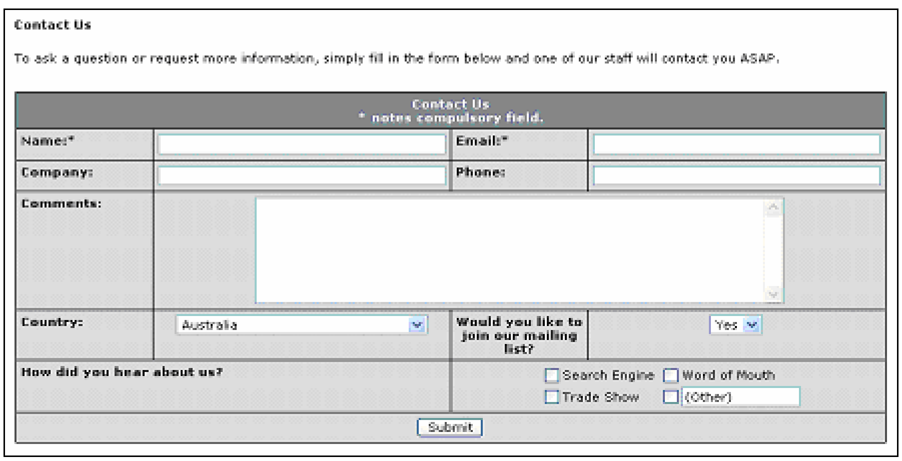


Figure 14-27 Formatted Form

Starting with the form created in the previous workshop:

1. Preview the page and print it out. Number the questions from 1-8 on the print out.

2. Now go to the *Format* tab and create a table with 4 columns, 7 rows and 100% width. Click on *Save* followed by *Commit*, and a 4x7 table is shown on your page.

We will firstly set up the correct structure, background colours, widths, etc and then set up the keyword replacement fields to reference the components of the form.

Form Structure

3. Click on the *Table Properties* icon , and set *Background Colour* to "000000", *Alignment* to "Centre", *Cell Spacing* to "1" and *Cell Padding* to "4". Click on *Save* followed by *Commit*.

4. Click on the *Row Properties* icon  for Row 2, and set *Background Colour* to "d3d3d3". Click *Save* followed by *Commit*. Repeat this step for Rows 3-7 inclusive.

5. Click on the *Cell Properties* icon  for row-1, column-1, (R1-C1). Set C*olspan* to "4", *Background Colour* to "708090" , *Alignment* to "Centre", and *Vertical Alignment* to "Top".

6. In the *Cell Properties* window for the following cells, set *Width* to "25%" and *Vertical Alignment* to "Top":

    Row 2: C1-C4

    Row 3: C1-C4

    Row 4: C1

7. In the *Cell Properties* window for R4-C2, set *Colspan* to "3", *Alignment* to "Centre" and *Vertical Alignment* to "Top".

8. In the *Cell Properties* window for Row 5: C1-C4, set *Width* to "25%" and *Vertical Alignment* to "Top".

9. In the *Cell Properties* window for R6-C1, set *Colspan* to "2" and *Vertical Alignment* to "Top". Repeat this step for R6-C3.

10. In the *Cell Properties* window for R7-C1, set C*olspan* to "4", *Alignment* to "Centre" and *Vertical Alignment* to "Top".

Keyword Replacements

For the following steps, click on the *Cell Contents* icon of the specified cell and paste the specified replacement keyword in the WYSIWYG editor. Click *Save* to exit the WYSIWYG editor.

> **TIP: You may need to refer to your form print-out to find the question numbers.**

11. For R1-C1 paste the replacement keyword “%section_1_title% %section_1_note%“.

> **TIP: You can also copy and paste the keyword replacements from the list at the top of the page.**

    Select the keyword replacements and click on the *Bold* icon to make the text bold, and click on the *Text Colour* icon to set its colour to white.

12. For R2-C1 paste the replacement keyword “%section_1_question_1_title%”.
13. For R2-C2 paste the replacement keyword “%section_1_question_1_answer%”.
14. For R2-C3 paste the replacement keyword “%section_1_question_2_title%”.
15. For R2-C4 paste the replacement keyword “%section_1_question_2_answer%”.
16. For R3-C1 paste the replacement keyword “%section_1_question_3_title%”.
17. For R3-C2 paste the replacement keyword “%section_1_question_3_answer%”.
18. For R3-C3 paste the replacement keyword “%section_1_question_4_title%”.
19. For R3-C4 paste the replacement keyword “%section_1_question_4_answer%”.
20. For R4-C1 paste the replacement keyword “%section_1_question_6_title%”
21. For R4-C2 paste the replacement keyword “%section_1_question_6_answer%”.
22. For R5-C1 paste the replacement keyword “%section_1_question_5_title%”.
23. For R5-C2 paste the replacement keyword “%section_1_question_5_answer%”.

24. For R5-C3 paste the replacement keyword "%section_1_question_8_title%".

25. For R5-C4 paste the replacement keyword "%section_1_question_8_answer%".

26. For R6-C1 paste the replacement keyword "%section_1_question_7_title%".

27. For R6-C2 paste the replacement keyword "%section_1_question_7_answer%".

28. For R7-C1 paste the replacement keyword "%submit_button%".

29. Click on the *Commit* button.

30. Now preview the page and look at the new formatting of your form.

♣ **You have now successfully completed Workshops 20 and 21** ♣

Chapter 15 The Users System

In this chapter, we introduce you to the ***Users System*** and show you how to create, edit and delete MySource user accounts. We also explain how ***Organisations***, are used to group MySource *Users* in MySource. Finally we will describe the *Wizards* that can be run through the *User System* at the end of this chapter.

The *User System* can be accessed at any time by clicking the *Users* icon in the MySource navigation bar. You will be taken to the *User System* screen which has two tabs, as shown in Figure 15-1 below:

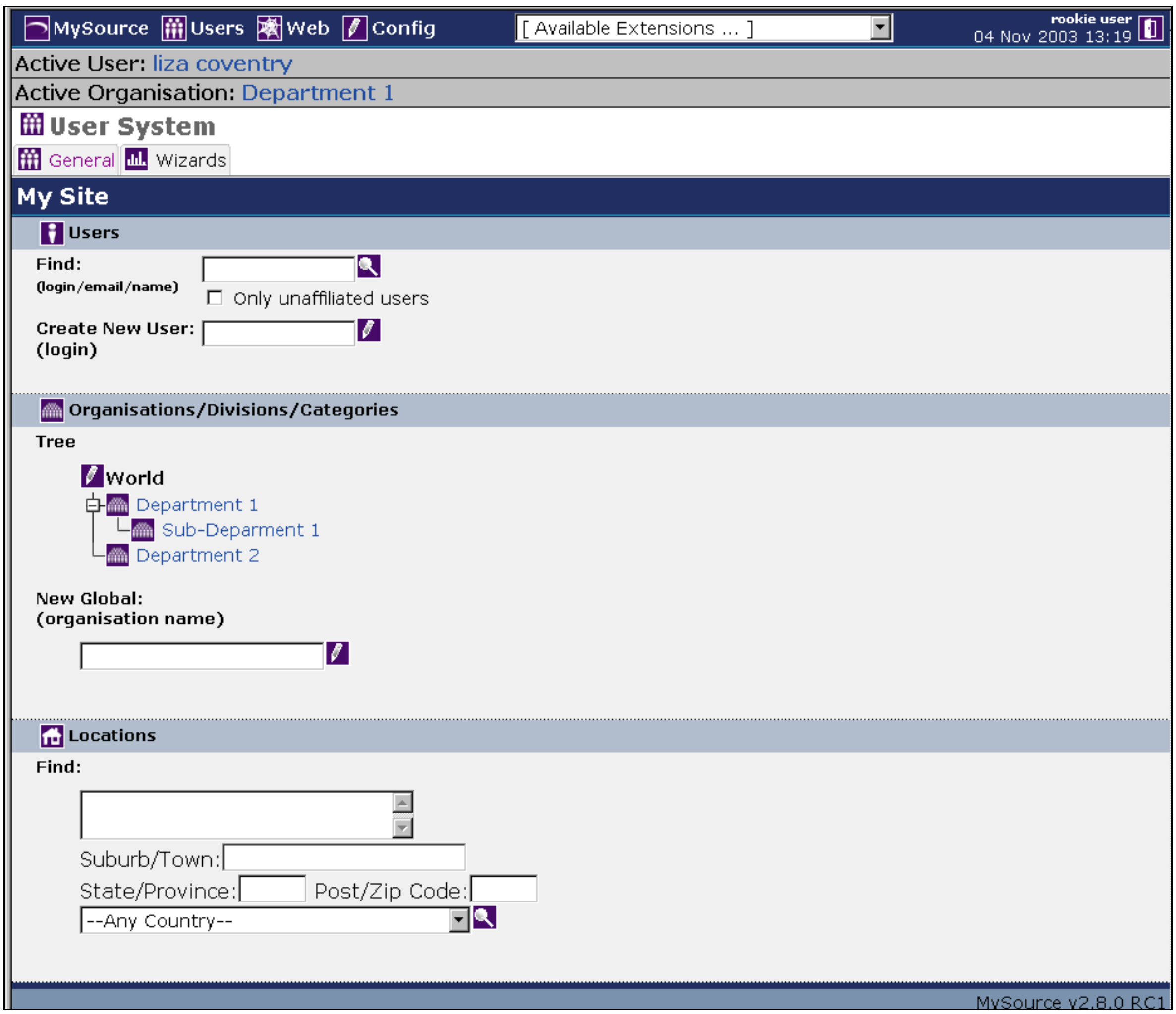


Figure 15-1 Users System Screen

TIP: Only *Super Users* and *User Masters* are able to access the *User System*. *Webmasters*, and *Site/Page Admins* and *Editors* do not have access to the *Users* tab.

General Tab

The *User System General* tab consists of three main sections:

- Users
- Organisations/Divisions/Categories
- Locations

Users

You can either search for an existing MySource User or create a new MySource User account in this section.

- **Find :** enter the login, email address or name (in full or in part) of an existing MySource User and click the *Find User* icon.

TIP: You can see all users by hitting the *Find User* icon without entering any criteria into the search box.

A list of *Users* found is displayed, showing their ID, login, name, email and account status. Clicking on the name of the *User* displays the *Edit User* screen (detailed below) for that *User*. Clicking on the email address of a *User* will open your default Email program.

- **Only unaffiliated users:** tick this checkbox to narrow your search to exclude *Users* that are affiliated with an *Organisation*.
- **Create New User:** enter the login for a new *User* and click on the *Create New User* icon . You are taken to the *Edit User* screen for the newly created user account.

TIPS On MySource Logins and Passwords:

- **Login names must only contain alpha-numeric characters – i.e. a-z in upper or lower case and digits 0-9.**
- **A login name must be unique and be a minimum of 2 characters.**
- **Logins are case insensitive.**
- **Passwords are case sensitive.**
- **Passwords cannot be the same as the login name.**
- **Passwords are stored using a one-way encryption algorithm, so you cannot see an existing password, only overwrite it.**

Organisations, Divisions or Categories

Organisations can be used to group MySource *Users* into a logical grouping in whatever way you like. You may refer to *Organisations* as *Divisions* or *Categories* and there is no difference between the three. As an example, you might use *Organisations* to represent the departmental structure of your company.

Tree – *Organisations*, like pages, are structured in a tree-like hierarchy of *Organisations* and sub-organisations, and the *Tree* works in a similar fashion to the *Site Map* on the *Edit Site* screen (see Chapter 6).

- **New Global: (organisation name)**: type in a name for the new *Organisation* you want to create and click on the *Create* icon. You are then taken to the *Edit Organisation* screen (see below).

Locations

You can use this section to search the locations that are in the system.

- **Find:** enter the Street, Suburb/Town, State/Province, Post/Zip Code or country to search for, and click the *Find Location* icon.

The matching *Locations* are displayed in a list above the search fields. For each *Location*, you can see the *Street*, *Suburb/Town*, *State/Province*, *Country*, *Post/Zip Code*.

TIP: If only one location matches your search, you are to the *Edit Location* screen for that location.

Edit User Screen

Whether you create a new user or edit an existing one, you are taken to the ***Edit User*** screen shown in Figure 15-2 below.

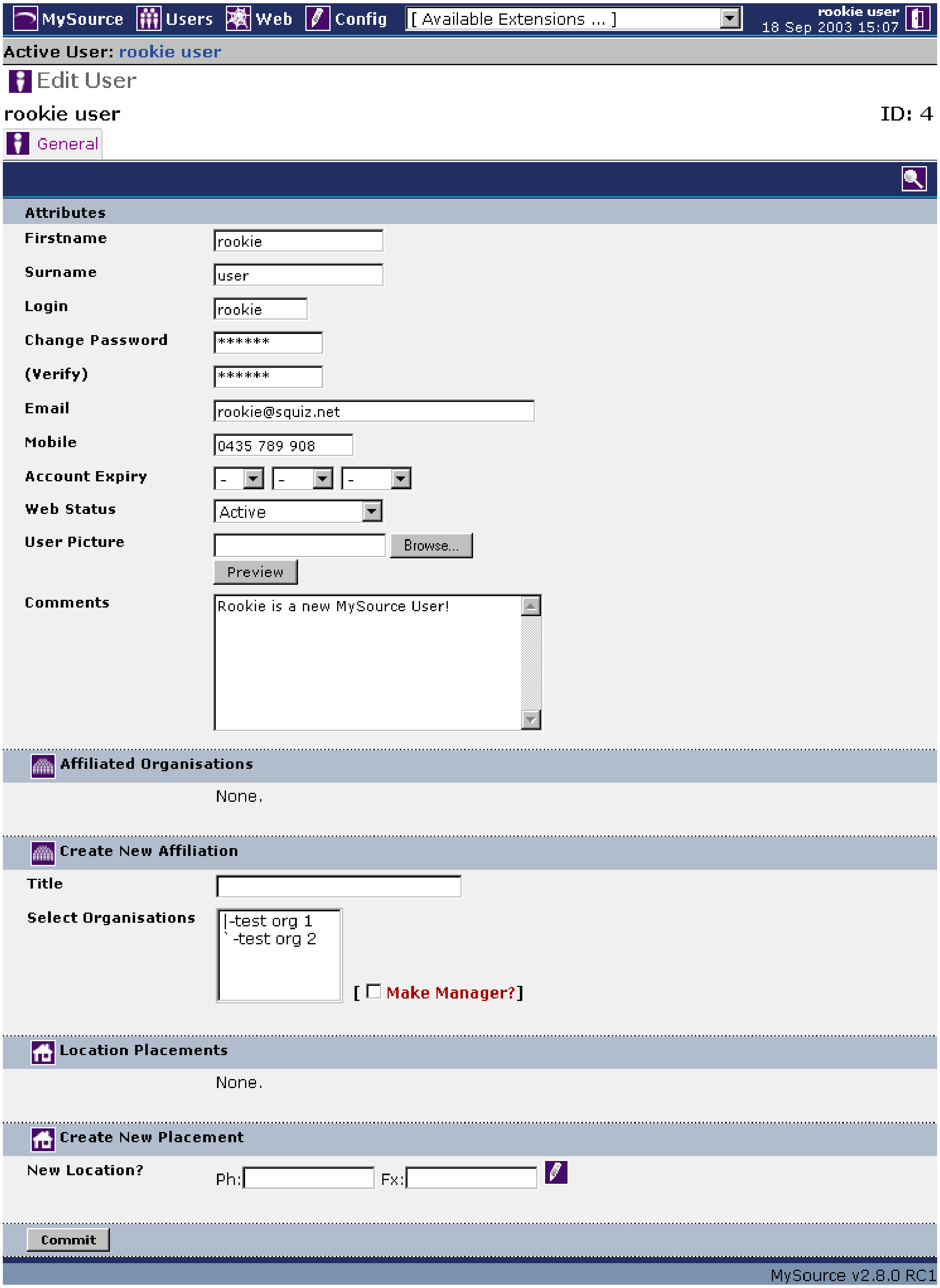


Figure 15-2 Edit User Screen

A link to the *Active User* is shown at the top of the *Edit User* screen. This is a navigational link back to the *Edit User* screen of that particular user, and can be used when in other parts of the *User System*.

TIP: Click on the *Users* icon in the top navigation bar to get back to the *General* tab again.

Attributes

In this section you can edit the various attributes of a particular user:

- Firstname
- Surname
- Login
- Change Password
- (Verify)
- Email
- Mobile
- Account Expiry
- Web Status
- User Picture
- Comments

The login and password fields are the only compulsory fields; other than these, you can enter as much or as little information as you want - you can even upload a picture of a user and enter comments about them!

TIP: Due to the secure way in which passwords are stored, you cannot view them, only change them.

The *Account Expiry* attribute could be useful, for example, if you have temporary staff and want their account to expire when their employment with your company ceases.

When a new user account is created, their *Web Status* is set to *Active* by default. However, if that user attempts to login to MySource using an incorrect password more than three times, the system will automatically set their *Web Status* to *Locked*. (This number three is the default setting and can be changed in the *Config* tab).

Towards the top of the screen on the right hand side you will see two icons:

- Clicking on the icon displays a new window where you can search for another MySource user account.

- Clicking on the icon deletes the user you are currently editing. This is irreversible, so please use caution when deleting a MySource user account.

Affiliated Organisations

This section lists any *Organisations* with which this user is 'affiliated'.

- **Title Textbox**: the text in this textbox is the *Title* of the *User* within that *Organisation* (this is the link between the two components).

- **Delete?:** you can delete the affiliation between the *User* and the *Organisation* by ticking this checkbox and clicking *Commit*.

Create New Affiliation

You can make the *User* you are editing a member of an *Organisation* (i.e. create an *Affiliation*) by entering the following information:

- **Title:** enter a title for the user in these *Organisations* in the textbox

- **Select Organisations**: select the *Organisation*(s) with which you want to affiliate the user. You can hold down the SHIFT or CTRL key for multiple selections.

Click *Commit*, and the newly created affiliations are shown in the *Affiliated Organisations* list above.

Depending on the user you are editing and how your *Organisations* and *Affiliations* are set up, you may see an extra tab next to the *General* tab labeled *Special User Data*. This is an advanced MySource User System concept, which is beyond the scope of this Manual.

Edit Organisation

Whether you create a new *Organisation* or edit an existing one, you are taken to the *Edit Organisation* screen, which is shown in Figure 15-3 below:

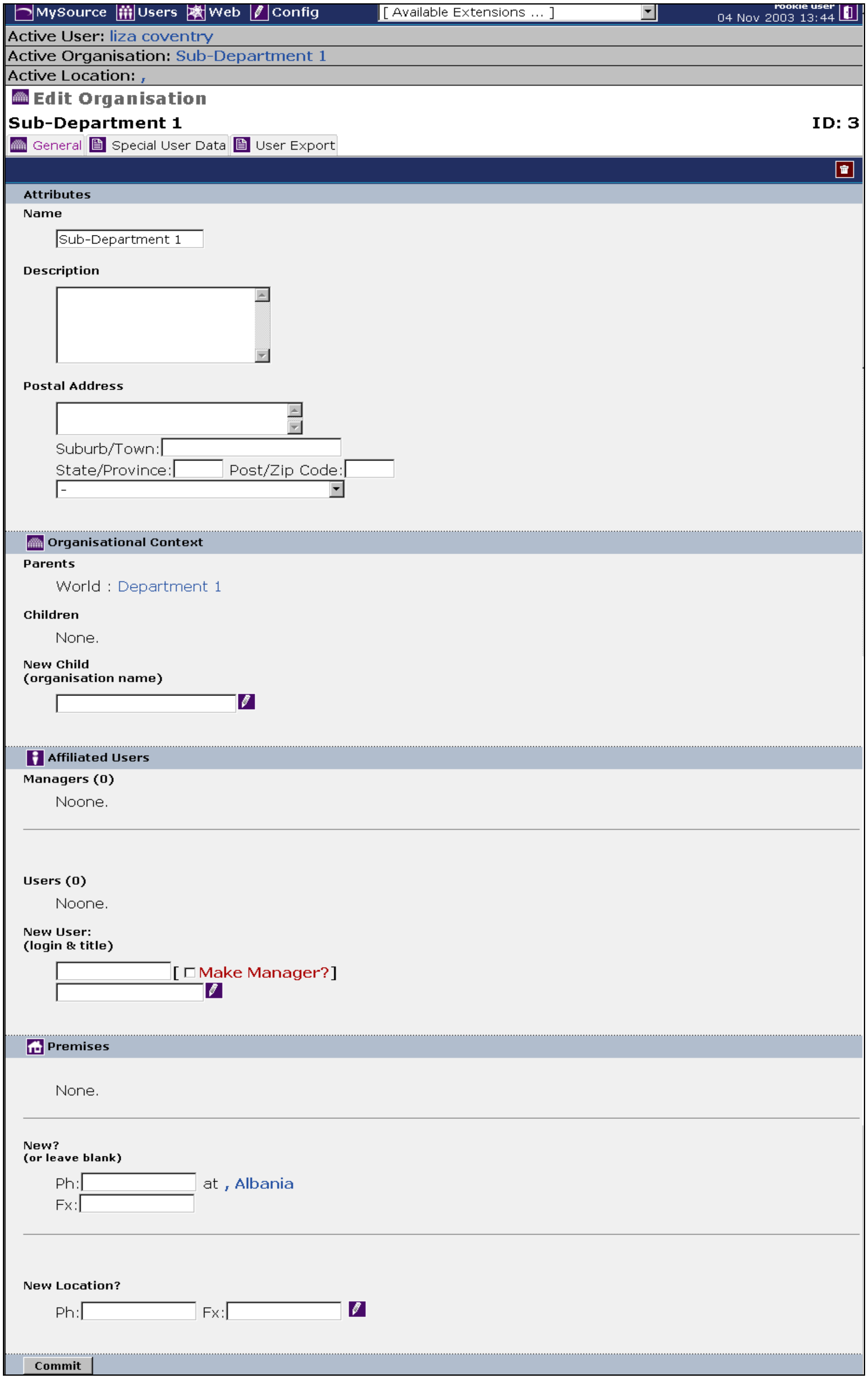


Figure 15-3 Edit Organisation Screen

This interface contains three tabs:

- **General**
- **Special User Data**
- **User Export**

By default you will be taken to the *General* tab. The *General* and *User Export Data* tabs are described below. The *Special User Data* tab allows you to specify additional data to be entered for the users that you add to MySource. This is an advanced MySource *User System* concept which is beyond the scope of this manual.

At the top of the *Edit Organisation* screen, you will see a link to the *Active Organisation.* This is a navigational link back to the *Edit Organisation* screen of that particular organisation, while you are navigating other parts within the *User System*.

General Tab

On the right hand side of the tab is a delete icon, which is used for deleting an entire *Organisation* and removing all its affiliated users.

TIP: You cannot delete an organisation that contains sub-organisations. In this case, you must first delete the sub-organisations, then delete the parent organisation.

- **Attributes:** edit some of the attributes of the *Organisation* such as its Name, Description and Postal Address.
- **Organisational Context:** this section illustrates where the *Organisation* you are editing fits within the organisational tree.

TIP: 'World' in this context refers to the root of the organisational tree.

You can also create sub-organisations of the *Organisation* you are currently editing here. Type the name of the sub-organisation in the *New Child* textbox and click the *Create* icon. You are then taken to the *Edit Organisation* screen for the new *Organisation* you just created.

- **Affliated Users:** if the *Organisation* you are currently editing has any MySource *Users* affiliated with it, they are displayed in this section. Affiliated *Users* are categorised into *Managers* and *Users*. You can make a *User* a *Manager* and vice versa by ticking the *Grant Management* or *Revoke Management* checkboxes and clicking *Commit*.

- **New User: (login & title):** this section provides you with an alternative way to create a new MySource *User* account and an affiliation with the Organisation you are currently editing. Type in the login of the *User* in the first textbox, tick the checkbox if they are to be a Manager, then type in a title which links them to the *Organisation* in the next textbox and click the *Create* icon. You are then taken to the *Edit User* screen for the user you just created.

TIP: If you want to make an existing user affiliated with this organisation you must go to the *Create Affiliation* section of the *Edit User* screen for that *User*.

- **Premises:** these define a link between an *Organisation* and a *Location*. *Locations* allow you to place MySource U*sers* into *Locations* and create *Premises*. However this is a little used function in MySource so for the purposes of this manual we will not go into any further detail on *Premises* and *Locations*.

User Export

You can use this facility to download a list of all the MySource user accounts that are affiliated with the Organisation you are editing to an Excel (CSV) or XML file.

Simply select an *Export Type* from the drop down list, whether or not to show headers (that is whether the first row on the exported file should include column names) and which fields you want to include in the export and click on *Commit*.

The system creates a file for you to download to your hard drive or LAN.

Wizards Tab

The *Wizards* tab displays a list of wizards that have been loaded to your system:

- **Created Accounts:** view a list of all accounts created in a given period of time.
- **Expired Accounts:** view a list of all accounts that are due to expire today and in the future.
- **User List:** view/export a list of all expired, active, locked, pending or ALL user accounts. Choose from Organisations(s)/Access Group(s).

To run a *Wizard*, simply click on the link next to the name of the *Wizard* and follow the screen prompts.

Chapter 16 Access Groups

In this chapter we discuss MySource *Access Groups* in depth. *Access Groups* are a group of MySource user accounts, and are used for creating an Intranet, Extranet or a Member's Area – that is, an area of your web site where access is restricted to a particular group of people.

As we have seen in earlier chapters, there are two types of *Access Groups*:

- **General Access Groups:** this type of access group is available for use across any site in your MySource system.
- **Site Access Groups:** this type of access group is only available for use in the site that you are currently editing and cannot be used by other sites in your MySource system.

You can reach the *Edit Access Group* screen by clicking on the name of an access group on the *Security* tab of the following screens:

- Web System
- Edit Site
- Edit Page

These screens are described in Chapter 5 to Chapter 7.

The editing screen for an access group is the same for both *General Access Groups* and *Site Access Groups*, and is shown in Figure 16-1 below.

Edit Access Group

The Edit Access Group screen is shown in Figure 16-1 below:

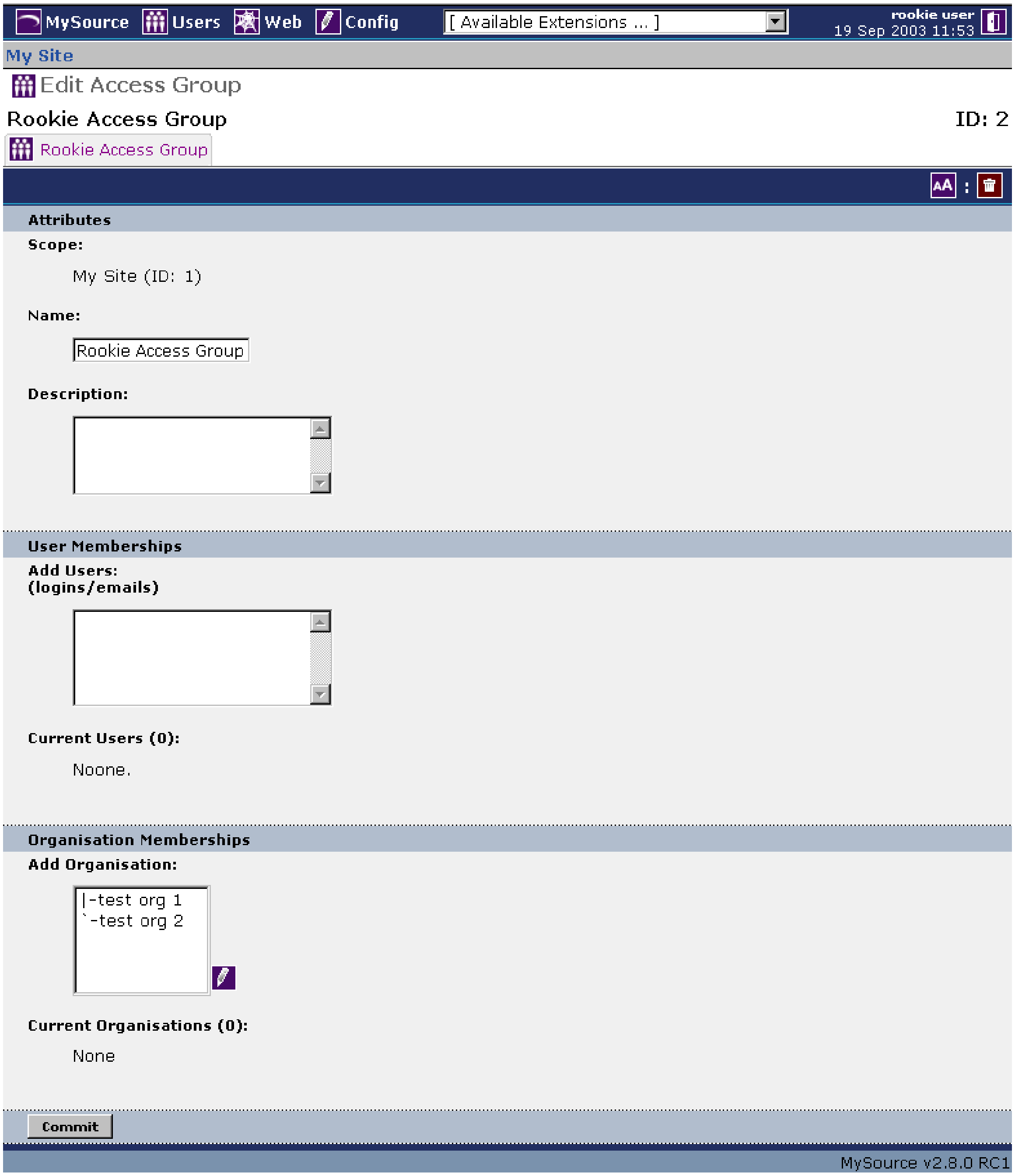


Figure 16-1 Edit Access Group Screen

Attributes

- **Scope:** this indicates whether this is a *General Access Group* or a *Site Access Group*. If this is a *General Access Group*, the scope is shown as *General*. If this is a *Site Access Group*, the name and ID of the site to which the access group applies is shown.

- **Name:** the name of the *Access Group* is shown in this text box. Edit the text to change the name.

- **Description:** enter your description for the *Access Group* in this text box. This is for your own internal use only and does not affect the way *Access Groups* function.

User Memberships

- **Add Users**: to adding existing MySource *Users* to an access group, type either their login or email address into the text box.

> **TIP: If you have already created an *Organisation* containing the appropriate list of users, you can add this to the access group instead of typing them all in individually. *Organisation Memberships* are discussed below.**

- **Current Users**: a list of all the MySource *Users* that are members of this *Access Group* is shown here. Clicking on the name of the user takes you to the *Edit User* screen for that *User* (see Chapter 16).

Organisation Memberships

- **Add Organisations**: you can add an *Organisation* to your *Access Group* as well as individual *Users*. When an *Organisation* is added to an *Access Group*, all the *Users* that are affiliated with that *Organisation* become members of the *Access Group* you are editing. (For more on *Organisations* see Chapter 15).

  Any *Organisations* defined in your MySource system appear in this text box. To add an organisation to your access group, select them from the list. You can hold down the SHIFT or CTRL key for multiple selections. Click the *Add Organisation* icon to add the *Organisation* to your *Access Group*.

TIP: To add an *Organisation*, you must click the *Add Organisation* icon rather than the Commit button.

- **Current Organisations:** a list of the *Organisations* that are members of this *Access Group* is shown here. The *ID*, *name* and *Number Of Users* in the *Organisation* is shown for each *Organisation*. Click on the *Delete* button to delete the *Organisation* from this *Access Group*.

TIP: Deleting an *Organisation* from an *Access Group* <u>does not</u> delete the *Organisation* from your MySource system.

Workshop 22 Creating and Populating a Site Access Group.

In this workshop we create a new *Site Access Group* and add MySource *Users* and *Organisations*.

Make sure you are in the *Edit Site* screen.

1. To create a *Site Access Group* select the *Security* tab of the *Edit Site* screen.

2. Add the name of your new *Site Access Group*, in the *Create New Site Group?* text box shown in Figure 4-1 below:

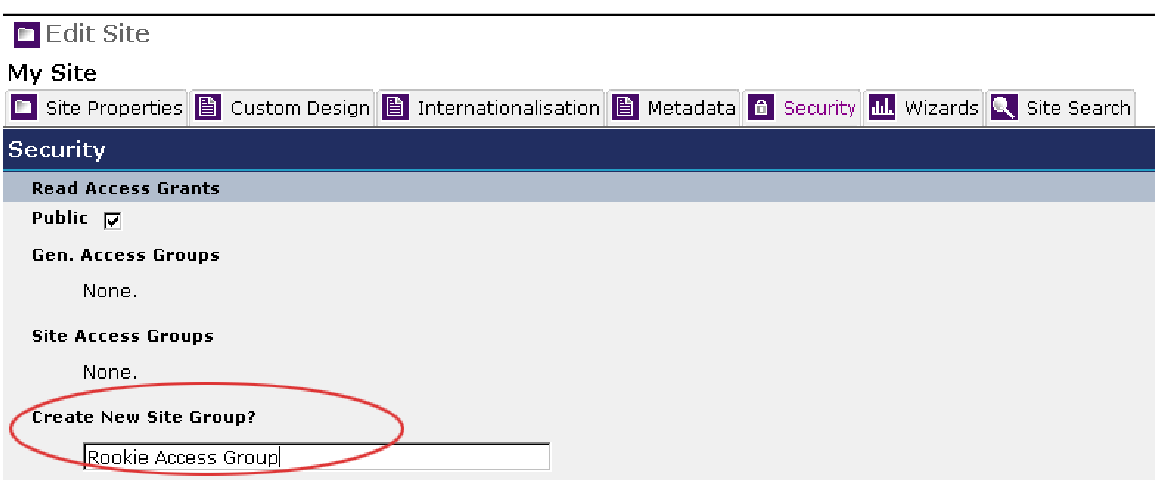


Figure 16-2 Creating and Populating a Site Access Group

3. Click the *Commit* button.

The page will refresh and will open up in the *Edit Access Group* screen for your new access group.

Now, let's populate your *Site Access Group* with MySource *Users*:

4. Add the Login names or email address of some of your users in the *Add Users* text box.

TIP: You can add more than one MySource *User* at a time, if necessary.

5. Click the *Commit* button.

If you have an organisation already set up, it can easily be added to your *Site Access Group*:

6. Scroll down to the *Edit Access Group* screen to the *Add Organisation* text box.

7. Select your *Organisation* and click the *Add Organisation* icon as shown in Figure 16-3 below:

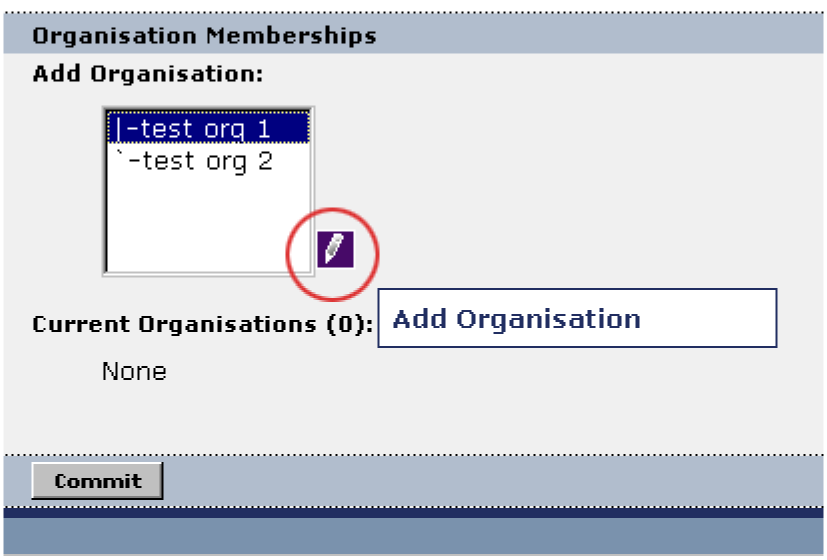


Figure 16-3 Creating and Populating a Site Access Group

The page will refresh and your new *Organisation* will be shown on the page, as shown in Figure 16-4 below:

Figure 16-4 Creating and Populating a Site Access Group

♣ **You have now successfully completed Workshop 20** ♣

Workshop 23 Building a Member's Area for your Site

In this workshop we create a Member's Area for your site.

Make sure you are in the *Site Properties* screen for your site.

1. Scroll down to the *Site Map* section, and click on the page that you wish to be the Member's Area.

2. On the *Edit Page* screen, click on the *Security* tab, and go to the *Read Access Grants* section as shown in Figure 16-5 below:

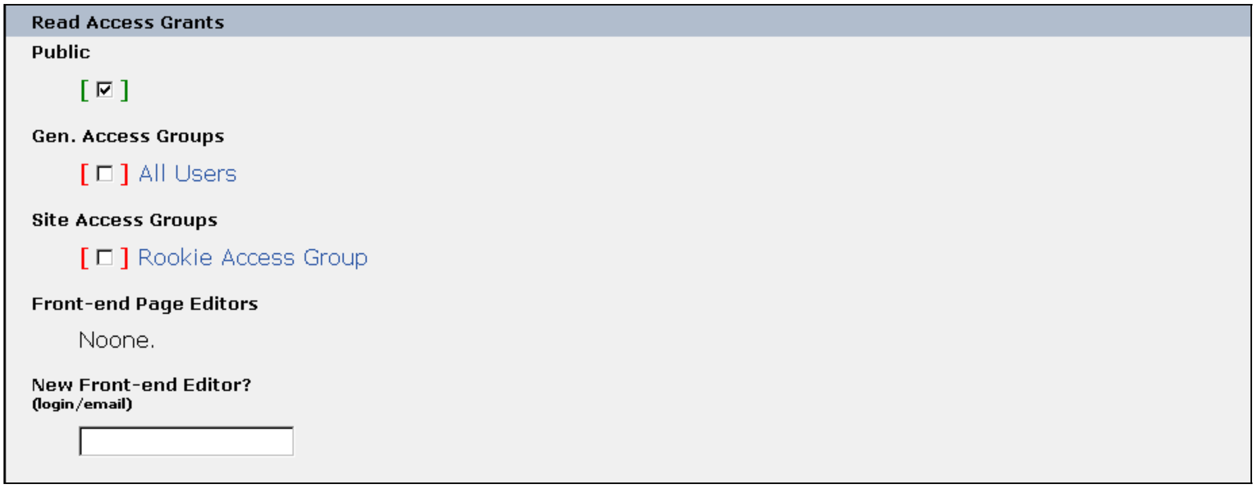


Figure 16-5 Read Access Grants

> **TIP: The *Access Groups* created in the previous workshop appear in the *Site Access Groups* section.**

3. Uncheck the *Public* checkbox, and check the *General Access* and *Site Access Groups* to whom you wish to give access to your Member's Area.

4. Click on *Commit.*

5. Click on the Preview icon to test your Member's Area.

6. If you are not a member of the *Access Group* who has access to the page, the login screen is displayed.

TIP: If you are logged in to MySource as a member of the *Access Group* who has access to the page, the Member's Area page will be shown immediately without the login screen. MySource uses the login that you used to login to MySource to authenticate your login to the Member's Area.

In this case, you will need to display a separate browser window, and type the URL for the Member's Area page into the Address field. The login window will be displayed.

7. Login as a member of the *Access Group* who has access to the page, and the Member's Area page is shown.

TIP: If you create an intranet or extranet, you can make a whole site a Member's Area. Go to the *Security* tab of the *Site*, and repeat the process outlined above.

Appendix 1 HTML Cheatsheat

HTML Tag	Description
<HTML></HTML>	Creates an HTML document.
<HEAD></HEAD>	Creates the header section containing the title and other information that is not displayed on the web page itself.
<BODY></BODY>	Creates the body section containing the visible portion of the document.
<A HREF="*URL*"></A>	Creates a hyperlink.
<A HREF="mailto:*EMAIL*"></A>	Creates a mailto: link.
<A NAME="*NAME*"></A>	Creates a target location or anchor within a document.
<A HREF="#*NAME*"></A>	Links to that target location or anchor from elsewhere in the document.
<TITLE></TITLE>	Sets the name of the document in the title bar.
<BODY BGCOLOR=?>	Sets the background color, using name or hex value.
<BODY TEXT=?>	Sets the text color, using name or hex value.
<BODY LINK=?>	Sets the color of links, using name or hex value.
<body vlink=?>	Sets the color of followed links, using name or hex value.
<BODY ALINK=?>	Sets the color of links on click.
<P></P>	Creates a new paragraph.
<P ALIGN=?>	Aligns a paragraph to the left, right, or centre.
 	Inserts a line break.
<BLOCKQUOTE></BLOCKQUOTE>	Indents text from both sides.
<DL></DL>	Creates a definition list.
<DT>	Precedes each definition term.
<DD>	Precedes each definition.
<OL></OL>	Creates a numbered list.
<LI></LI>	Creates a numbered or bulleted list item.
<UL></UL>	Creates a bulleted list.
<DIV ALIGN=?>	A generic tag used to format large blocks of HTML. Also used for stylesheets.
<PRE></PRE>	Creates preformatted text.
<Hl></Hl>	Creates a level 1 heading.
<H6></H6>	Creates a level 6 heading.
<B></B>	Creates bold text.

HTML Tag	Description
<I></I>	Creates italic text.
<TT></TT>	Creates teletype, or typewriter.
<CITE></CITE>	Creates a citation, usually italic.
<EM></EM>	Emphasizes a word (with italic or bold).
<STRONG></STRONG>	Emphasizes a word (with italic or bold).
<FONT SIZE=?></FONT>	Sets size of font, from 1 to 7.
<FONT COLOR=?></FONT>	Sets font color, using name or hex value.
<IMG SRC="*NAME*">	Adds an image.
<IMG SRC="*NAME*" ALIGN=?>	Aligns an image: left, right, center; bottom, top.
<IMG SRC="*NAME*" BORDER=?>	Sets size of border around an image.
<HR>	Inserts a horizontal rule.
<HR SIZE=?>	Sets size (height) of rule.
<HR WIDTH=?>	Sets width of rule, in percentage or absolute value.
<HR NOSHADE>	Creates a rule without a shadow.