Recite CMS Control Panel User Guide

Recite CMS 2.1.8

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Chapter 1. Quick Start

This is a quick start guide to help you set up a new site with Recite CMS. Each step is covered briefly; for more detail, refer to the chapters in this user guide.

1. *Log in to Recite CMS Control Panel*. Refer to Logging In and Out.

2. *Upload files*. This includes CSS files and any other images (such as your logo) used to display the site. Refer to Managing Files.

3. *Create a page template*. Use the `Static Page` template type to create a template that your web site pages will use. This template will make use of your CSS file and site images. Include containers so you can add dynamic content (such as web site navigation). Refer to Managing Pages and Administration Mode.

4. *Update the home page*. Change the home page so it uses your newly-created template. Refer to Managing Pages.

5. *Create other pages*. Your web site will typically have more than one page! Refer to Managing Pages

6. *Add web site navigation*. Create a template to display your navigation then add the **Pages Site Map** rule to your page. Refer to Administration Mode.

Chapter 2. Using the Control Panel

Recite CMS is a Content Management System (CMS) that allows you to easily create and manage your web site. Sites are managed using the Recite CMS Control Panel. This document will instruct you how to effectively use the Control Panel.

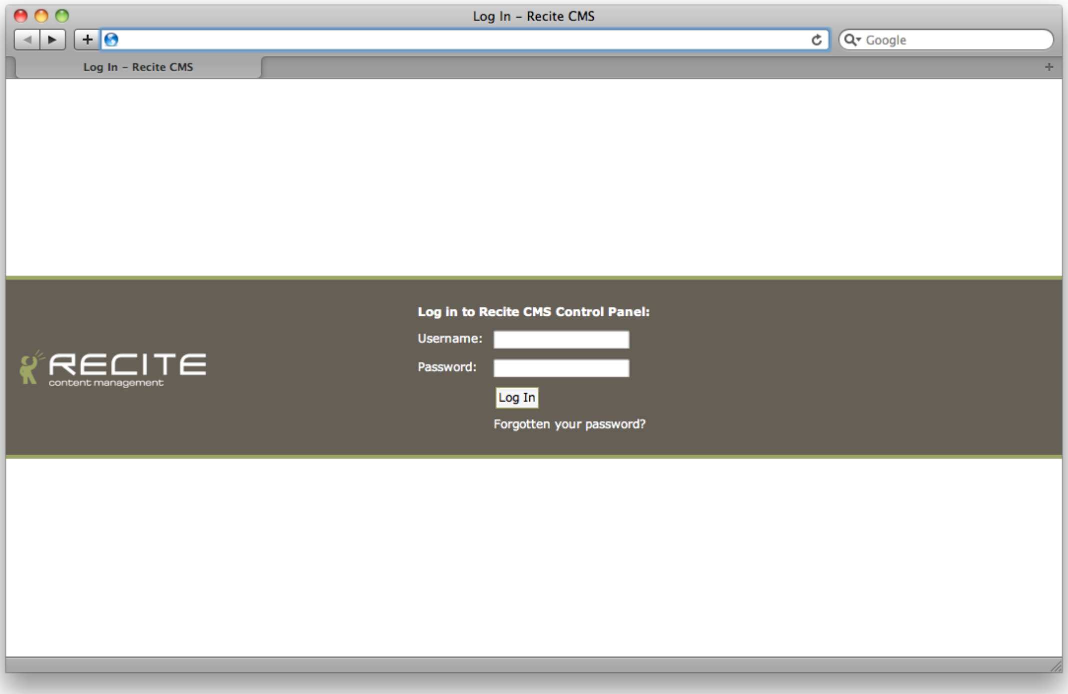
When using the Recite CMS Control Panel, please ensure you're using one of the following supported browsers:

- Microsoft Internet Explorer 7 or newer
- Mozilla Firefox 3 or newer
- Safari 3 or newer
- Google Chrome

Logging In and Out

To begin, you must log in to the Recite CMS Control Panel at the web address provided to you.

Figure 2.1. The client listing page



Enter your username and password then click **Log In**.

Tip

If you have forgotten your password, click the **Forgotten your password?** link so you can retrieve it. Instructions on how to change your password will be sent your email address.

If your log in details are invalid you will be shown an error message. If your details are correct, you will be taken to the Recite CMS Control Panel home page.

Once you are logged-in, you can log out either by closing your browser or by clicking the **Log Out** link at the top-right of the Control Panel.

Status Messages

To inform you about the progress of an action you performed in the Control Panel, Recite CMS makes use of several status messages. These appear along the top of the Control Panel.

There are two types of status messages. Firstly, a loading message appears in the top-right while an action is being processed. Secondly, a informational message to indicate how some operation went.

The following figure demonstrates the loading message. Typically this will simply say `Loading...`, but in some cases may display a different message.

Figure 2.2. The Control Panel loading message

There are several different informational messages that can be displayed, each of which is shown in the following figures.

Figure 2.3. The Control Panel "Info" message

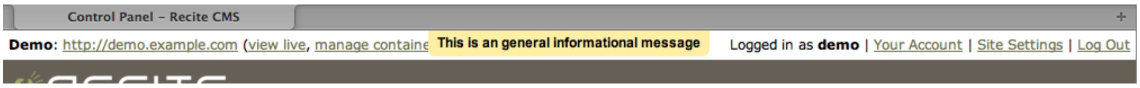


Figure 2.4. The Control Panel "Success" message

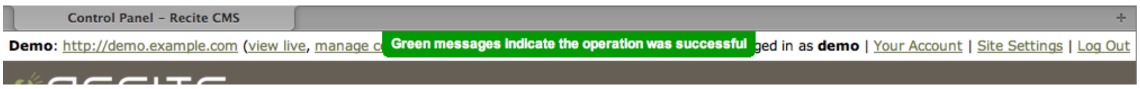


Figure 2.5. The Control Panel "Notice" message

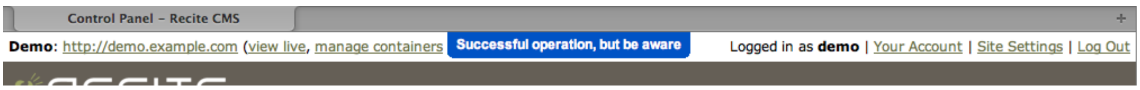
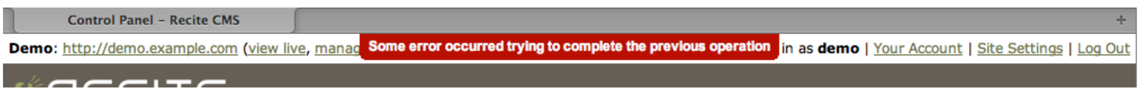


Figure 2.6. The Control Panel "Warning" message

Figure 2.7. The Control Panel "Error" message



Managing Tabs

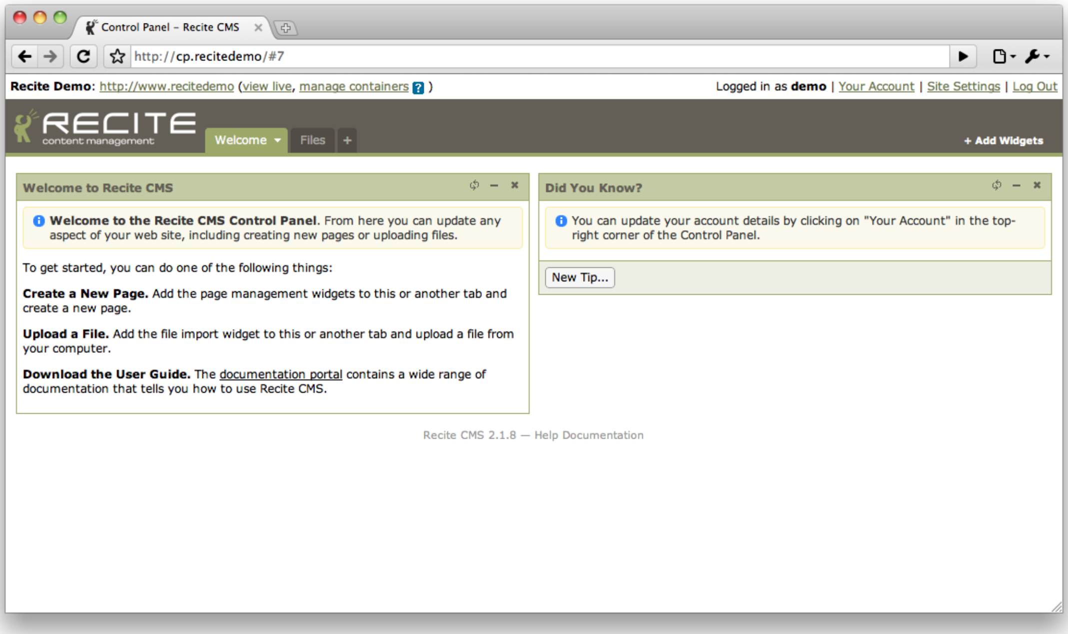
Recite CMS is highly customizable, allowing you to decide how you want the Control Panel to be laid out. The Control Panel is built around *tabs* and *widgets*.

A tab is a group of widgets, split up into columns. A widget is like a self-contained application, responsible for managing a single aspect of your web site. For example, there is a **File Import** widget, solely used for uploading files to your web site.

You can have any number of tabs, and each tab can have any number of widgets, arranged as you please. This is demonstrated in the following figure.

The best thing about being able to manage tabs is that you can configure them as required to best suit your current activity. For example, if you're currently implementing a new site design you can have open the template editor and file editor widgets on the same tab so you can quickly make edits.

Figure 2.8. Tabs and widgets in the Control Panel



In this figure, there are two tabs (entitled `Welcome` and `Files`). The `Welcome` tab is currently loaded (indicated by it being highlighted).

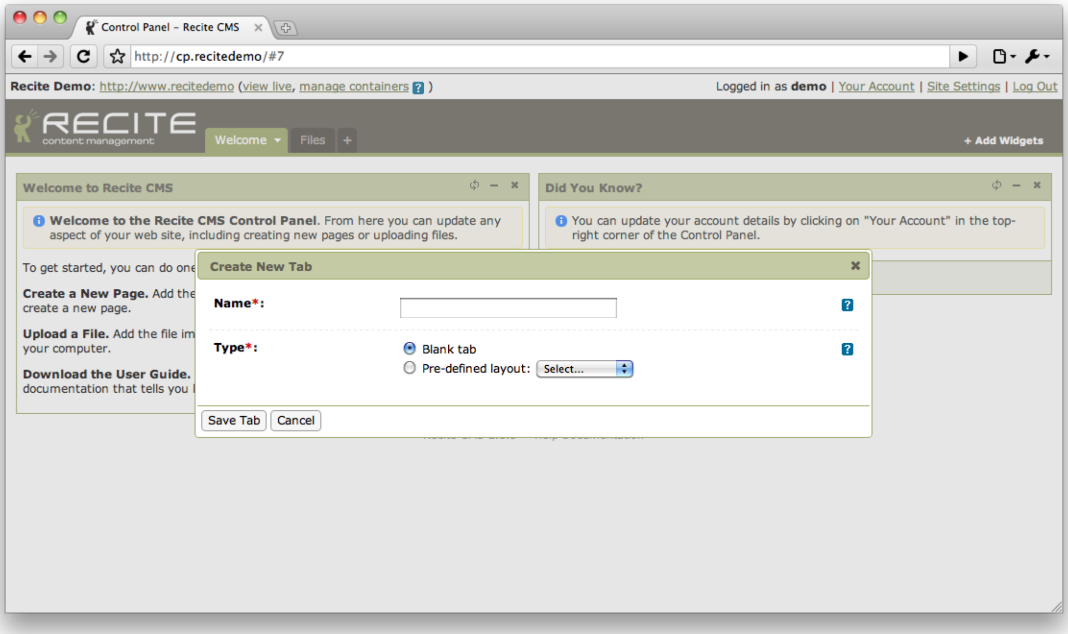
This tab has two columns, each containing one widget. You can interact with these widgets. For example, the right-hand tab (The **Did You Know?** widget) contains a tip about Recite CMS. You can click the **New Tip** button to reload the widget for a different tip.

Clicking on the **Files** tab will load that tab.

Creating a Tab

When you first log in to the Control Panel, you may not have any tabs pre-created. If not, you will be prompted to create a new tab before you do anything else. If you already have tabs created you won't be prompted, but you can create new tabs at any time by clicking the "plus" button in the Control Panel (beside the Recite CMS logo). This will open the tab creation dialog.

Figure 2.9. The tab creation dialog



You can either create a blank tab (to which you will add widgets shortly), or you can add a pre-defined layout. To create a blank tab, enter a name for the tab. To use a pre-defined layout, select it from the drop-down box. If you didn't enter a title yet the name of the selected layout will be used.

Click **Save Tab** to create the new tab. Once created, it will automatically be loaded.

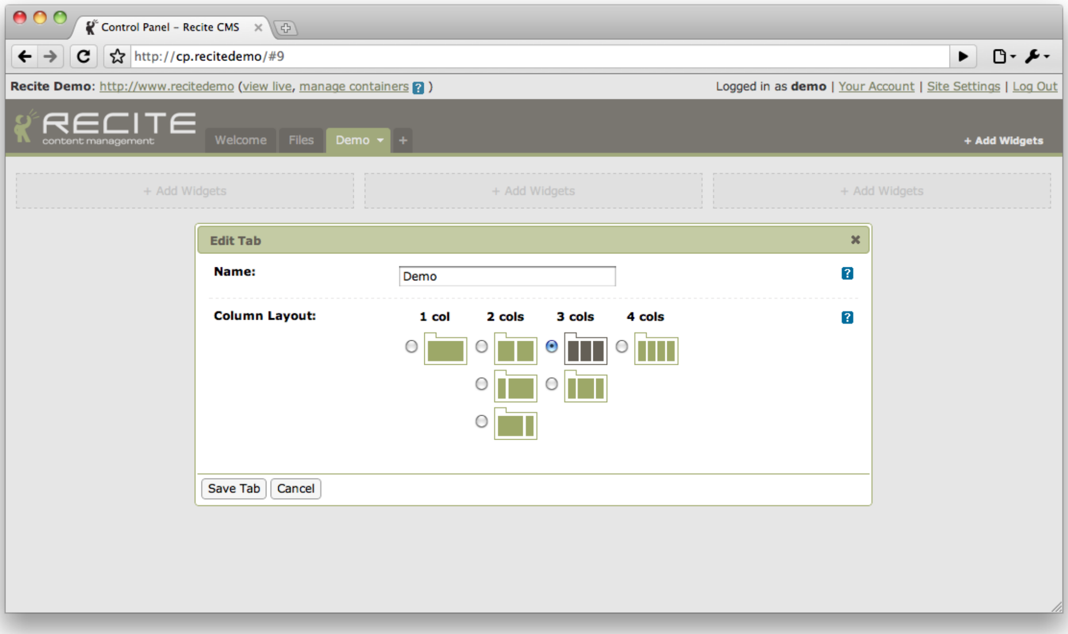
Note

If you created a blank tab you will then prompted to add widgets to the tab. This will be covered shortly in Adding New Widgets. To follow through this chapter in order, click **Close** to hide widget browser.

Editing a Tab

When you create a new (blank) tab, it will be created with three columns, all of equal width. If you want to change this layout - or if you want to rename your tab - hover the options arrow on the name of the active tab and select **Edit**. This will open the tab edit dialog.

Figure 2.10. The tab edit dialog



You can now rename the tab or change the column layout for the tab. If you decide you don't want to change the tab, click the **Cancel** button. Otherwise, click the **Save Tab** button to save your changes.

If you have change the layout, the tab will now reload according to your new settings.

Removing a Tab

To remove a tab, hover over the options arrow on the active tab and click on **Delete**. You will then be prompted to confirm that you want to delete the tab.

When you delete a tab, all of the widgets that were on the tab are also deleted. Note however that this won't impact any data on your web site.

After the tab is deleted the first tab will automatically load. If there are no tabs remaining you will be prompted to create a new tab.

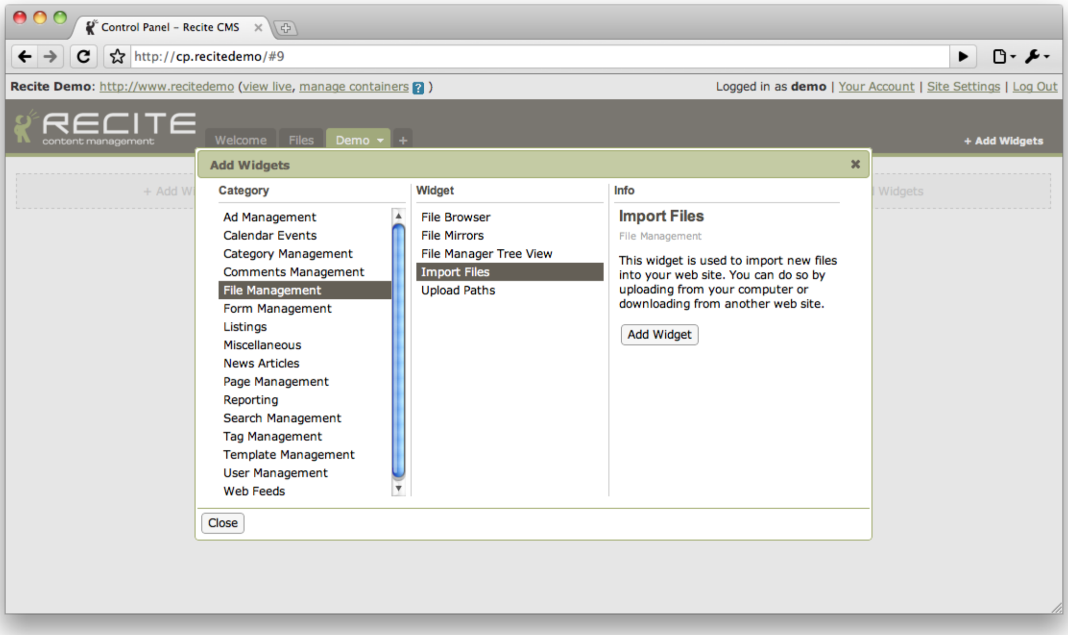
Adding New Widgets

Widgets are added to the Control Panel using the widget browser. To open the widget browser, click on **Add Widgets** in the Control Panel header.

Tip

When you move your mouse over this link, Recite CMS will try and suggest widgets that may be useful to you. The list of widgets it shows are based on the widgets currently being shown on the current tab.

Figure 2.11. The widget browser with the `File Management` category and `Import Files` widget both selected.



Widgets are grouped into categories depending on the functionality they provide. In the above figure, the `File Management` category has been selected. Once this was selected the list of widgets belonging to this category were shown.

When a widget is selected from this list, the details of that widget are loaded. Beneath the description for the widget is a button labelled **Add Widget**. Click this button to add the widget to the current tab. It will be placed automatically based on the size of the widget and the tab layout.

Note

If a column has no widgets in it a message will be displayed in the column indicating so. Clicking on this message will open the widget browser, and any widgets subsequently added will be added to this column.

You can add as many widgets as required while the widget browser is open. Click the **Close** button at the bottom of the widget browser once you are done.

Organising Tabs and Widgets

The order of tabs can be changed in the Control Panel by clicking and dragging a tab to a new position. When you drop the tab in its new place its position will automatically be saved.

Widgets can be moved within their tab. You can move the widget to a new position in its current column, or you can drag the widget to a new column. To move a widget, click and drag in the header bar of the widget.

Refreshing Widgets

To refresh a widget click the refresh icon in the header bar of the widget.

Hiding Widgets

You can minimize a widget so only its header bar is showing. This can help you save space if you have many widgets on the current tab. To minimize the widget, click the minus icon in the widget header.

The body of the widget will change the icon will change to a plus symbol. To restore the widget to its previous size click on the plus icon.

This setting will be remembered next time you load the tab.

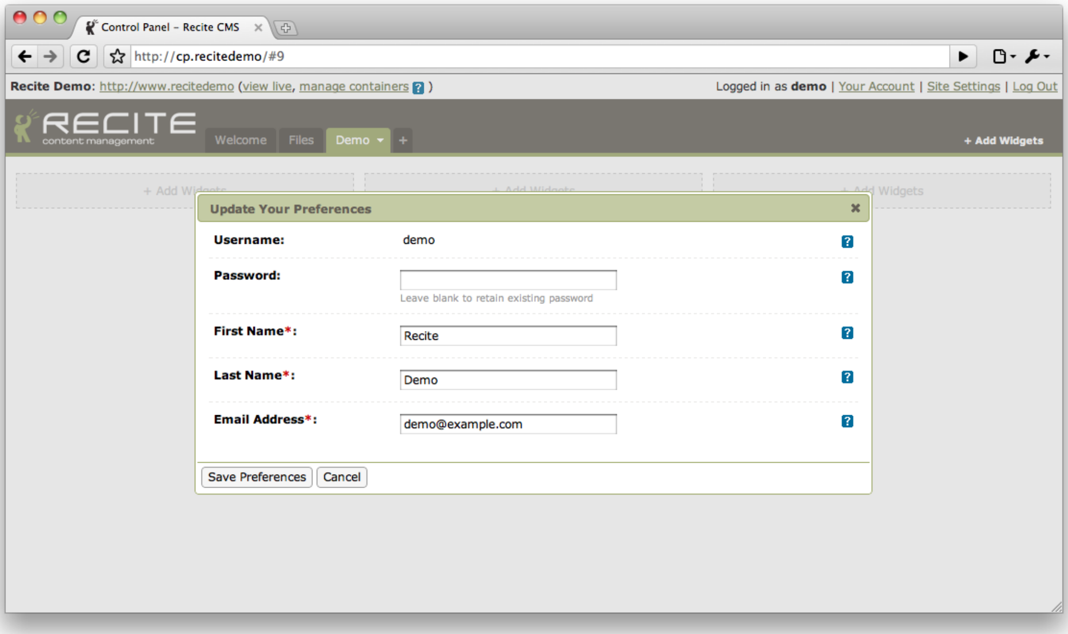
Removing Widgets

To remove a widget, click the remove icon on the widget header.

Managing Your Account

To upate your details (such as your email address or password), click the **Your Account** link in the top-right of the Control Panel.

Figure 2.12. Updating your account details



If you do not want to update your password, leave the password field blank.

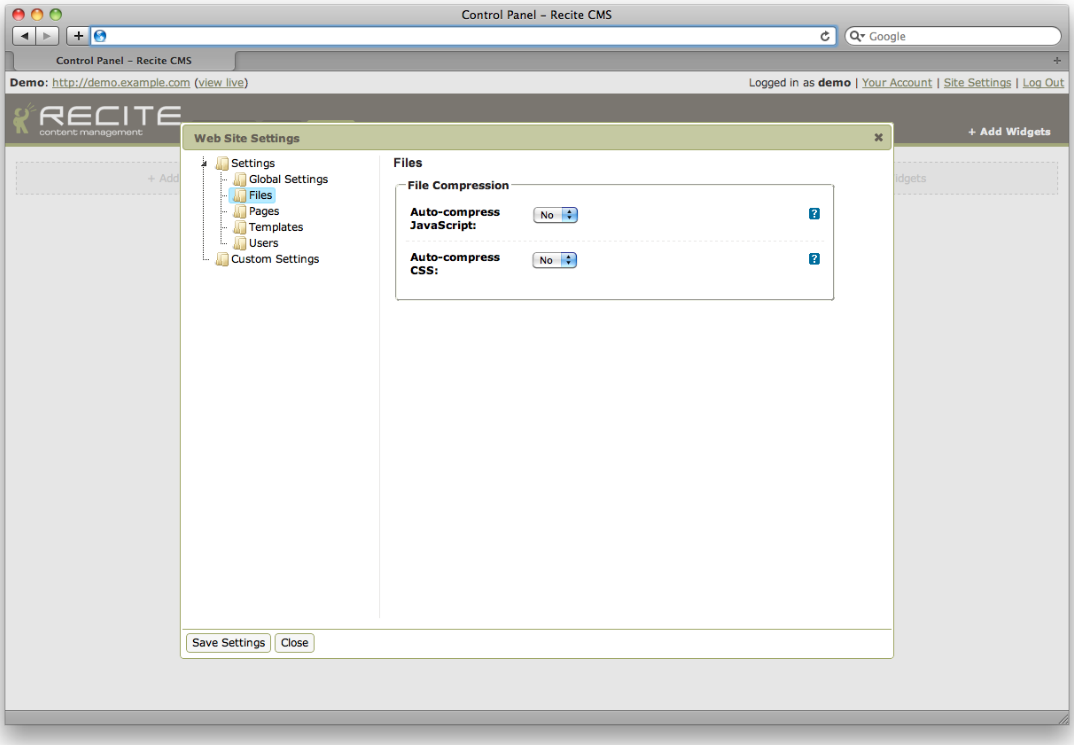
To save your changes, click the **Save Preferences** button.

Managing Web Site Settings

There are a number of settings that can be controlled that will impact how your web site works in Recite CMS. These can be managed by clicking **Site Settings** at the top-right of the Control Panel. This will load the **Web Site Settings** dialog.

There are a number of different *settings bundles* that can be configured, each of which is listed in the left-hand column of the settings dialog. Select a bundle to load the available settings.

*Figure 2.13. The site settings dialog with the **Files** bundle loaded*



Once the bundle is loaded, update any settings as required. If you try to switch bundles before saving your changes, you will be prompted to either save or discard your changes.

Tip

Hover your mouse over the help icon to the right of each setting for an explanation of its purpose.

Click the **Save Settings** button to save changes to the current bundle. Clicking on **Close** will close the settings dialog.

Managing Maintenance Mode

Recite CMS allows you to put your web site into maintenance mode. If somebody visits your web site and it is in maintenance mode, they will be shown a message to indicate that the site is currently undergoing maintenance.

You can control whether or not your site is in maintenance mode using the **Maintenance Settings** section of the web site settings.

When your site is in maintenance mode, a message is display at the top of the Control Panel indicating so. You can take it out of maintenance mode either by clicking the **Disable** link in the header, or through the site settings dialog.

Managing Web Site Caching

Recite CMS uses a technique called *caching* to significantly speed up access to your web site. This works by saving a static copy of some content so only minimal processing is required when somebody accesses your site.

In some cases the cached data may not clear immediately, meaning newly added or updated content may not appear right away. If you want it to appear immediately, you can *clear the cache*.

To clear the cache, access the **Cache Settings** section of the settings dialog and click **Clear Cache**.

Specifying a Robots.txt File

Recite CMS allows you to easily specify settings for controlling how your web site is automatically crawled by search engines. When managing web site settings, load the **Global Settings** bundle and enter the contents of the `robots.txt` file in the appropriate field.

Now when you visit the `/robots.txt` file on your web site you will be shown what you enter in the text field.

Chapter 3. Managing Files

Recite CMS features a file manager, used for managing the files that appear on your web site. This includes images, PDF downloads, music downloads, stylesheets, and everything else.

Files are organised into separate folders, just like they are on your computer, and you can move files between folders, rename files, rename folders, and edit or overwrite files.

This chapter covers how to manage files in Recite CMS, including how to store custom data with files.

Getting Started

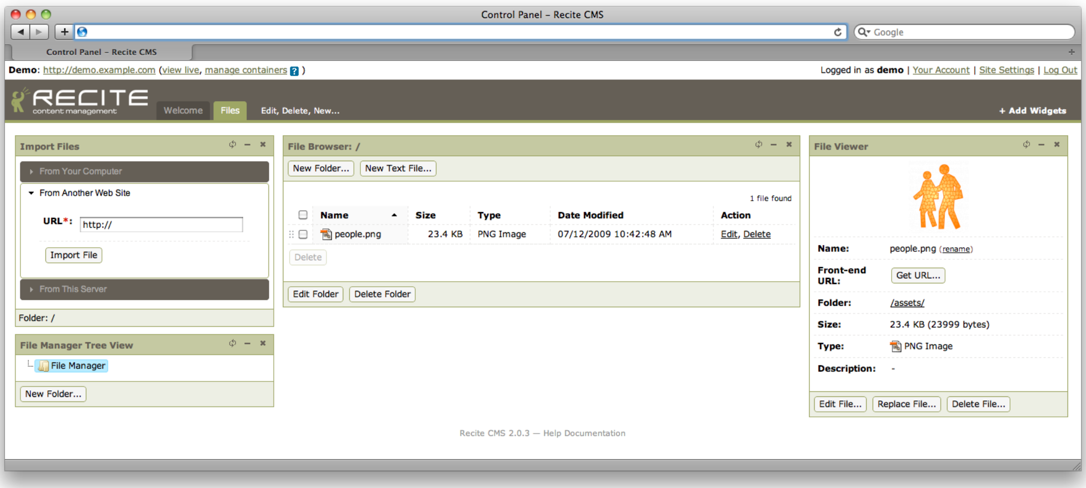
There are several different Control Panel widgets available to help you manage files. These are as follows.

- **File Browser**. This widget lists all folders and files within the active folder. You can click on a folder to set it to the active folder, or you can click on a file to load it in the **File Preview** widget.
- **File Manager Tree View**. This widget shows all folders in the file manager, organised by their hierarchy. You can expand or contract the display as required.
- **Import Files**. This widget is used to add files to your web site.
- **File Viewer**. This widget is used to view details about a single file. You can't manually add this widget to a tab - it is loaded when you click on a file in the **File Browser** widget.
- **File Editor**. This widget is used to edit text files directly through the Control Panel. You can't manually add this widget to a tab - it is loaded when you choose to either create a new text file or editing an existing one.

You can either add these widgets manually (they can be found in the `File Management` category in the widget browser), or you can create a new tab using the **Files** pre-defined layout.

The following figure demonstrates this layout. The tab is a three-column layout, with the **Import Files** and **File Manager Tree View** in the first column, the **File Browser** in the middle column, and the **File Viewer** widget in the right-hand column.

Figure 3.1. Sample tab layout for managing files



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Files** tab.

Managing Folders

Files in Recite CMS are organised into folders. You can add, edit and delete folders as required. Once created you can upload files to the folder.

Additionally, for every folder you can define a set of custom fields that can be stored with each file in the folder.

Creating a Folder

There are two ways to create a folder. Firstly, you can select the **New Folder** button from the file browser. The newly-created folder will be created within the currently active folder.

Secondly, you can click **New Folder** at the bottom of the tree view widget. The newly-created folder will be created within the currently selected folder.

After clicking either of these buttons a dialog box will appear with options for creating the new folder. Enter a name for the folder and click **Save New Folder**. You can define a set of custom fields for the folder also if you like - this will be covered shortly.

After the folder has been created the file browser and tree view will both be updated to include the new folder.

Editing a Folder

To edit an existing folder (that is, rename it, or change the custom fields), you can either click the **Edit** button beside the relevant folder in the file browser, or you can click the **Edit Folder** button at the bottom of the file browser (this is used for editing the active folder).

A dialog will now appear which is the same as the folder creation dialog. Update the details as required and click **Save Folder Changes**.

If you renamed the folder, the file browser and tree view will now reflect this change.

Moving a Folder

Moving a folder involves using the tree view widget. Drag the folder you want to move to its new location within the tree and its new position will be saved.

Warning

This will also move all its children folders and files.

Deleting a Folder

Folders can be deleted from within the file browser widget using one of three methods. Firstly, you can click the **Delete** button beside the folder you want to delete.

Secondly, if you want to delete the currently loaded folder click **Delete Folder** at the bottom of the widget.

Finally, if you want to delete multiple folders (or files), check the box next to each item you want to delete and click **Delete** at the bottom of the list.

Before any folders are deleted you will be prompted to confirm the deletion.

Warning

Deleting a folder will delete all folders and files within the folder. Deleting a folder cannot be undone.

Custom Fields For Files

When you create a new folder, you can define a set of custom fields with the folder. For every file that belongs to this folder you can fill out these fields.

You can also edit the list of custom fields when you edit the folder.

Note

You can't specify the field values when you import a file - you must edit the file after it is in Recite CMS in order to set the custom field values.

For information about managing a custom field list, refer to Managing Custom Field Lists.

Importing Files

To add new files to your web site, you must use the **Import Files** Control Panel widget. There are three ways you can import files:

- Upload from your computer using Recite CMS.
- Have Recite CMS retrieve the file from another web site.
- Upload using FTP or SFTP.

Uploading From Your Computer

Uploading directly from your computer is the simplest way to upload files and likely the method you will use the most.

To upload from your computer, ensure the **From Your Computer** section of the widget is activated, then click **Select Files**.

This will open a file selection dialog. You can select one or more files to upload.

Tip

If you are using Microsoft Windows, hold **Control** and click on each file you would like to upload to select it (or click again to de-select). If you are using Mac OS X, hold **Command** instead.

After selecting the files to upload, they will appear in a queue below the **Select Files** button. From here, you can choose to either upload each file individually, or you can click **Upload All** to upload all files (one at a time).

You can clear files from the queue either before or after they are uploaded.

Once files are uploaded the **File Browser** widget will update to show the newly uploaded files.

Tip

To select the folder to upload to, navigate to it in the **File Browser** widget. The upload path is shown at the bottom of the import widget.

Retrieving From Another Web Site

To add a file from another web site, ensure the **From Another Web Site** section of the import widget is activated. You can then enter the URL of the file you want to import.

After you click **Import File**, Recite CMS will attempt to download the file in the background and save it to your web site. If it is unable to do so an error message will be displayed.

If it was successful, you will be notified and the **File Browser** widget will refresh to show the new file. The file will have the same filename as it had on the remote server.

Uploading Using FTP or SFTP

If your administrator sets up an FTP (File Transfer Protocol) or SFTP (Secure File Transfer Protocol) server, it can be linked to Recite CMS using the **Upload Paths** widget.

Once one or more upload paths are defined, after you upload a file to that path you can import the file to Recite CMS using the **Import Files** widget. Select the **From This Server** section of the widget.

Any files that are found in the upload paths will be listed, allowing you to select the file you want to import. Once selected, click **Import File** to copy the file into Recite.

If you want to remove the file from the original upload location after it is imported into Recite CMS, check the **Delete from server after import** option before importing the file.

Managing Upload Paths

To link an FTP or SFTP upload path with Recite CMS, you must add the path using the **Upload Paths** widget.

> **Note**
>
> Folders inside the upload path are not searched and will be ignored.

Click the **New Upload Path** button in this widget to add an upload path. Enter a name by which to identify this upload path, as well as the path on the local filesystem.

The path that you add must contain a file with the filename `.recite`. This is a simple security measure to ensure you can't just add any directory on the server.

Click the **Create Upload Path** button to add the upload path.

Uploading a Compressed File

If you have a large number of files you want to upload at once, an alternative to importing each file one-by-one is to upload a single ZIP file then extract it from within Recite CMS.

The folder structure in your ZIP file will be imported also.

You can achieve this using the following procedure:

1. Create a ZIP file containing all the files you want to upload. Both Microsoft Windows and Mac OS X provide built-in functionality for creating ZIP files.
2. Upload the ZIP file using the **Import Files** widget. Upload it to the folder you want to extract it to.
3. Click on the ZIP file to load it in the **File Viewer** widget.

4. Click the **Extract File** button to extract the file. You will prompted to confirm that you want to extract the file.

Once the file has extracted, the file browser will be refreshed and you will see the extracted files. At this stage you can delete the ZIP file if you no longer want it.

Creating a New Text File

If you want to create a new text file (such as a CSS file), you can do so without having to upload it first.

Click the **New Text File** from the file browser. This will open the text editor widget, allowing you to create a new file in the current folder.

Enter the name of the file, then use the large text area to insert file content. You can then click **Save File** to save content and keep editing, or click **Save and Close** to save content and close the editor widget.

Managing Files

Once you have imported a file into Recite CMS, there are a number of different file management tasks you can perform.

Viewing File Details

Clicking the name of the file in the file browser will load the file in the **File Viewer** widget.

The file viewer shows various information about the file, including its filename, the folder it belongs to, the size of the file, and the type of the file.

Additionally, if the file is an image, a small preview of the file is shown. Clicking this preview will load the full image in a new browser window.

Editing a File

To edit a file (such as renaming the file or updating associated custom fields), either click the **Edit File** button on the file viewer widget, or click the **Edit** link beside the file in the file browser.

A dialog will be opened with options for updating the file. Update any fields as required and click **Save File Changes**.

Deleting a File

There are several ways to delete a file. Firstly, you can click the **Delete File** button on the file viewer widget. Next, you can the **Delete** link beside the file in the file browser widget. Finally, you can bulk-delete by checking all the files (or folders) you want to delete in the file browser and clicking the **Delete** button.

Regardless of the method used, you will be prompted to confirm that you want to delete the file(s).

Warning

This operation cannot be undone.

Moving a File

If you want to move a file (or multiple files) to a different folder you can do so using the file browser and tree view widgets.

On the very left of each file is a drag handle (a series of dots). Clicking and dragging from here allows you to drag the file to a different folder in the tree view widget.

Additionally, if you check multiple files, you can then click and drag from one of the selected file's drag handle to move all selected files.

Replacing a File

It is possible to replace the actual data of a file without deleting the original file and uploading a new one.

This can be useful if the file is linked to some other content and you want to update the file data without having to re-create the file links.

To do so, click the **Replace File** button on the file viewer widget.

A dialog will appear, allowing you to upload a file from your computer. You can decide whether to retain the existing file's filename or to use the filename of the newly-uploaded file (if different from the existing).

Editing File Contents

You can edit the contents of a file directly through the Control Panel if the file is a text file. This is useful for updating JavaScript or CSS files.

Click the **Open in Editor** button from the file viewer widget to open the file.

Note

This button is only available for text files.

You can now update the file content as required. Click the **Save File** button to save your changes. You can keep editing after this. Alternatively, click **Save and Close** to save your changes and close the editor widget.

Tip

If you have made changes to a template and not yet saved them, the template editing area will have a red border and red-tinted background colour. This is simply to remind you to save.

Tip

You can make the template editing area bigger or smaller by dragging it up or down from the bottom of the area.

Restoring an Old Version of a File

If you have access to the Recite CMS versioning module, you can easily revert back to an old version of a file. This is useful if you make changes to a file that you want to undo.

To view old versions of any file, click the **View Revisions** button while viewing the file. You will then be shown a dialog which lists all of the different versions that are saved.

The current version will be selected by default, but you can select an older version from the list to see the differences. If you want to restore that older version, click the **Restore** button. The older version will now be restored.

When an older file is restored, it is saved as yet another revision of the file. This means you can revert back to the version you just switched from.

Using Files On Your Web Site

There are several different ways the files can be used on your web site once you have imported them into your web site.

Linking to Files On Your Web Site

When viewing a file's details in the Control Panel, there is a button labelled **Get URL**. Clicking this button opens a dialog which shows you the path on your web site where this file is accessible. It shows the URL both with and without the web site domain at the start of it.

You can use this URL in your pages or templates, using HTML code similar to the following:

Example 3.1. Linking to a File Manager File

```
<a href="/assets/myfile.pdf">My File</a>
<img src="/assets/myimage.png" alt="My Image" />
```

To help with linking to files, you can also use the file browser in the WYSIWYG editor. This is covered in File Browser.

Listing Files On Your Web Site

If you want to list a series of files on a single page in your web site (such as in an image gallery), you can use the **File Listing** container rule.

You can find more details about managing container rules in the Administration Mode chapter.

When listing out files with this rule, you can then either link directly to the file (so the user downloads it), or you can create a **File Details** page, which is used to show the details of a single file.

For more information about creating a new page, refer to the Managing Pages chapter.

Uploading Files Via Your Web Site

If you want to give users the ability to upload files from your web site, you can do so using the **File Upload** form.

This form allows you to customize many aspects, including specifying the upload folder, allowed types of files and maximum file size. Additionally, if the upload folder has custom fields, users can specify the values of these fields.

When you create this form, you can also create a form recipient who will be emailed files when they are uploaded.

For more details about creating forms, refer to the Managing Forms

Compressing Files

Recite CMS provides built-in functionality to *minify* JavaScript and CSS files. Minifying a file means redundant characters are removed from the file, thereby making the file download much more quickly without affecting its functionality.

You can make all CSS and JavaScript files minify automatically by enabling the settings (click on **Site Settings** at the top of the Control Panel) in the **Files** settings bundle.

Alternatively, you can enable minification on a file-by-file basis by linking to `/__/assets/compress/path/to/file.js` instead of `/assets/path/to/file.js`

Thumbnails

Recite CMS provides built-in thumbnailing functionality, allowing you to show smaller versions of files very easily.

To create a thumbnail, use the special `{thumbnail}` template tag.

Tip

For more information about writing templates, refer to the Template Writing Guide appendix.

There are several arguments use with the `{thumbnail}` tag.

- `path`. This is the path of the file. If you want to thumbnail the image with the path `/assets/myImage.png`, then use this value.
- `w`. The maximum width of the thumbnail.
- `h`. The maximum height of the thumbnail.
- `crop`. If you set this to `true` and the image is larger than your specified width and height, the image will be cropped (from the center) to the specified dimensions. You cannot use both `crop` and `pad` at the same time.
- `pad`. If you set this to `true`, the resultant image will be the size you specify, with whitespace padding around the image where necessary.

For instance, if you want to output a thumbnail exactly 200 pixels wide and 150 pixels wide which links to the full size image, use the following code.

Example 3.2. Creating an Image Thumbnail

```
<a href="/assets/myImage.png">
    <img src="{thumbnail path='/assets/myImage.png' w=200 h=150 pad=true}" />
</a>
```

Chapter 4. Managing Pages

In Recite CMS, pages are what define the structure of your web site. Additionally, pages hold the main content of your site.

There are many different types of pages that can be created, each of which serves a different purpose.

In this chapter I will show you how to manage pages, managing page content, manage meta data, and manage the types of pages.

Getting Started

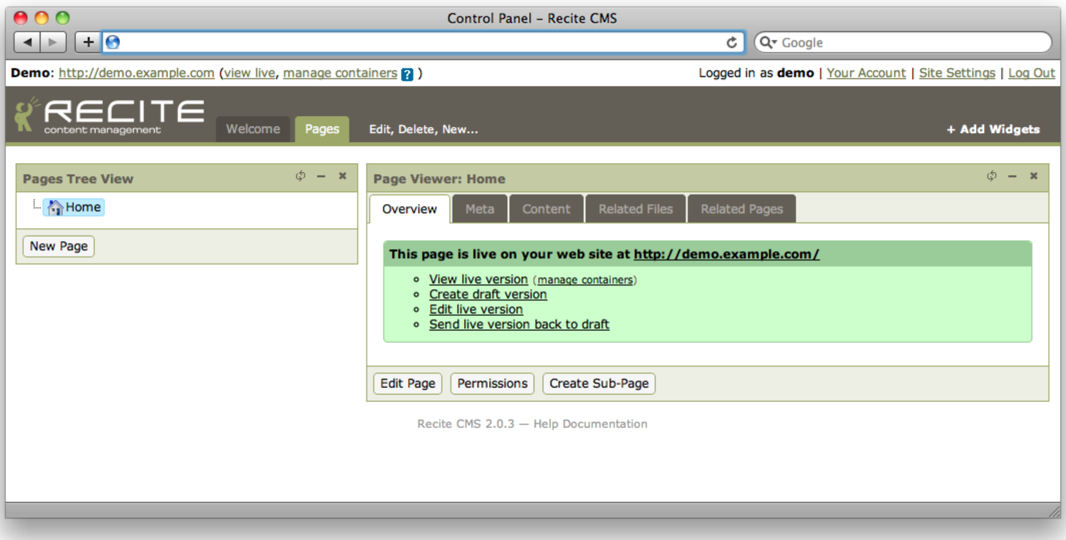
There are several different Control Panel widgets available to help you manage pages. These are as follows:

- **Page Manager Tree View**. This widget shows all pages in the site, organised by their hierarchy. You can expand or contract the display as required. When you click a page in the tree view, it will be opened in the page viewer widget.
- **Page Types**. This widget is used to manage page types. Your site must have at least one page type, and all pages created are each linked to a type.
- **Page Viewer**. This widget is used to view and manage the details of a single page. You can't add this widget manually - it is automatically loaded when you click on a page in the tree view widget.
- **URL Mapper**. This widget is used to map arbitrary URLs on your site back to a specific page. This is covered later in this chapter.
- **Sub-Sites**. This widget is used to manage your sub-sites. A sub-site exists on a different domain but allows you to display content from your main web site.

You can either add these widgets manually (they can be found in the `Page Management` category in the widget browser), or you can create a new tab using the **Pages** pre-defined layout.

The following figure demonstrates this layout. This tab is a two-column layout with a wide right-hand column. In the left column is the **Page Manager Tree View** widget, while in the right column is the **Page Viewer** widget.

Figure 4.1. Sample tab layout for managing pages



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Pages** tab.

Managing Page Types

Every page created in Recite CMS is linked to a page type. Each of the different page types are used for outputting different types of data. For example, there is one page type used for outputting an RSS feed, while there is another to output a calendar event.

Once you create a page type, you can create any number of pages with that page type.

Most pages you create in Recite CMS will use the *Static Page* type, which is automatically created for you. If you want to create other page types you must add the **Page Types** widget.

Creating a Page Type

To create a new page type, click the **New Page Type** button on the page types widget. You will then need to choose a *driver* to use for the type. The driver determines what the page type is capable of.

The options that are available when creating or editing a page type (and subsequently, pages of that type) will depend on the driver being used.

All page types have title. This is used to identify the page type from within the Control Panel (such as when you're creating a new page).

Additionally, most page types allow you to specify a list of custom fields. Fields added here will appear when you create a form of this type. For more details on managing a field list, refer to Managing Custom Field Lists.

Click the **Create Page Type** to save your new page type. Once the type has been saved it will appear in the list of page types, and you will be able to create a new page of that type.

Editing a Page Type

You can edit an existing page type by clicking the **Edit** link beside the page type you want to edit.

Update any details as required then click **Save Page Type Changes**.

Deleting a Page Type

To delete a page type, click the **Delete** link beside the page type in the page types widget.

You will be prompted to confirm that you want to delete the page type.

Note

You can only delete a page type if no pages are using that type.

Managing Pages

Pages define the structure of your web site, and to a large extent determine the functionality of your site. Every page has a page type, determined when the page is created.

This section tells you how to create and manage pages, including updating page content, managing page meta data, and managing draft versions of pages.

Creating a New Page

There are two ways you can create a new page. Firstly, you can click the **New Page** from the pages tree view widget. This is used for creating a sub-page of the page that is currently selected in the tree.

Secondly, you can click the **Create Sub-Page** button when viewing the details of a page (in the page viewer widget).

Before you can create the new page, you must select which page type to use. The page type will determine which fields must be completed when creating the new page.

Note

Some page types cannot be used within other page types. For example, if you have a page type that uses the calendar event details, then you cannot create a page of this type within another page of this type. Be aware of this if the page type you want to use for a new page does not appear to be available.

At minimum, you must fill the title and URL fields when creating a new page. The title field is used to identify the page within the Control Panel. Additionally, you can output this value on your web site if required.

The URL field is used to determine how your web site visitors access the page. This value is combined with all pages above the page to determine the URL.

How Does the URL Work?

The home page has a URL (without domain) of `/`. If the home page has a child page with a URL value of `products`, then the full URL for that page will be `/products`. Additionally, if the products page has a sub-page with a URL value of `abc-product`, then its full URL will be `/products/abc-product`.

Most page types will require you to select a template to output the page on your site (some don't, such as when using an RSS feed page type. This type of page outputs code that is compatible with RSS feed readers). For details on creating a page template, refer to the Managing Templates chapter.

Once you have filled out all required fields, click the **Create Page** button. Once the page has been created it will appear in the pages tree view. You can now click on it in the tree to view the page details.

Editing a Page

Once a page has been created you can edit its details by clicking on the **Edit Page** button on the page viewer widget. This will open the page editor dialog, which is similar to the page creation dialog.

Once you have made the necessary changes click the **Save Page Changes** button.

Deleting a Page

To delete a page, click the **Delete Page** button when viewing the page details. This button is not available for the home page, since the home page cannot be deleted.

You will be prompted to confirm deletion of the page.

Warning

Deleting a page will also delete all pages that are contained within the page. This operation cannot be undone.

Managing Meta Data

In addition to the custom fields that can be specified for page types, you can also add any additional custom data to a page as required. This is achieved using the **Meta** tab when viewing a page.

Note

This feature may not be available for certain page types.

When you load this tab a list of existing meta data values is shown (when you create a new page there won't yet be any).

To create a new meta value, click the **New Meta Value** button. You will now have to select the type of value you would like to add.

Once you have selected the value type you will be shown a dialog for creating the new value. Firstly, enter a title for the value. This is used to identify the meta value, and can be output on your web site if required.

Next, enter a name for the field. If this is left blank the name will be created using the title value. The name value is important as it is used to refer to the meta field from within page templates.

Finally, enter the value for the field. Once you have done so, click the **Create Meta Value** to create the new value. The list of meta values for the page will then be updated.

To make changes to the meta value, click the **Edit** link beside the value. Make any changes as required then click the **Save Meta Value** button.

To delete a meta value, click the **Delete** button beside the value you want to delete. You will be prompted to confirm that you want to delete the value.

Managing Content Blocks

Pages in Recite CMS can have any number of content blocks. You can manage content blocks by clicking on the **Content** tab when viewing a page's details.

Note

The content blocks that are available for a page is dependent on the template that is being used. In your template, using the `{contentblock}` template tag specifies a content block.

You can have any number of content blocks on a page - if the template has none then you cannot manage content blocks for the page.

Each content block must have its own name, specified using the `name` parameter. For example, you can use `{contentblock name='Right Column'}` to add a content block called `Right Column`.

Once the content blocks tab is loaded, you will see all of the available content blocks. There will be a preview displayed for each block, as well as an **Edit Block** button above each preview.

Click this button to edit a content block. This will result in the Recite CMS WYSIWYG editor appearing in a dialog box. Refer to the WYSIWYG Editor Guide appendix for details on using this editor.

Once you have made required changes, click the **Save** button. This will save your changes and leave the WYSIWYG editor open. You can also click the **Save and Close** button which will save the changes then close the WYSIWYG. Alternatively, you can click **Cancel** to discard any changes since you last saved.

Managing Draft Pages

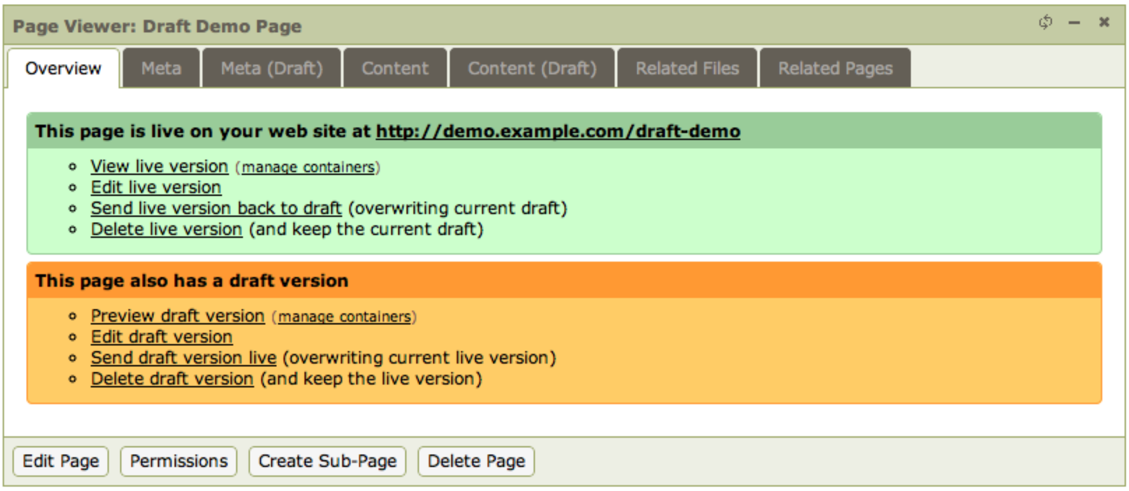
Recite CMS allows you to have a draft version of any page in your site. Each page can have either a live page, a draft page, or both. Visitors to your site can only see the live page.

Draft pages are useful because they allow you to change aspects of your site and preview those changes before you send them live.

If a page is in draft (and doesn't have a live version), then any pages within that page are also not accessible by your site visitors (regardless of the status of those sub-pages).

You can easily determine the status of a page by looking at the **Overview** tab when viewing the page. If there is a live version of that page you will see a large green box indicating so; if there is a draft version you will see a large orange box.

Figure 4.2. The overview of a page with both a live and a draft version



Creating a Draft

There are two ways to create a draft page. The first way is to click **Create draft version** in the content overview box. This will make a copy of the live page (including containers, content blocks and meta values), while keeping the live version in place.

The second way to create a draft is to click the **Send live version back to draft** link. As the name suggests, the page will no longer be live and will only be in draft.

Managing a Draft Page

Once you have created a draft, you can make changes to the page details, its content and its meta data. Additionally, if you load the draft page in container view you can manage container rules independently of the live page.

To edit the main page details, click **Edit draft version** in the draft status box. You can update all fields for the page except for its URL and its template (these are both managed by editing the live version of the page).

To manage meta data and content blocks for the draft version, use the relevant tab at the top of the page viewer. A new tab is created for managing draft content blocks and a new tab for managing draft meta data.

To manage container rules independently of the live page, click the **Manage containers** link in the draft status box. When Recite CMS is in administration mode, the Recite CMS overlay will indicate whether or not you're managing the live or draft page.

For more details about managing container rules, refer to the Administration Mode chapter.

Previewing a Draft Page

If you want to preview any changes you've made to the draft page without having to send it live, click the **Preview draft version** link in the draft status box.

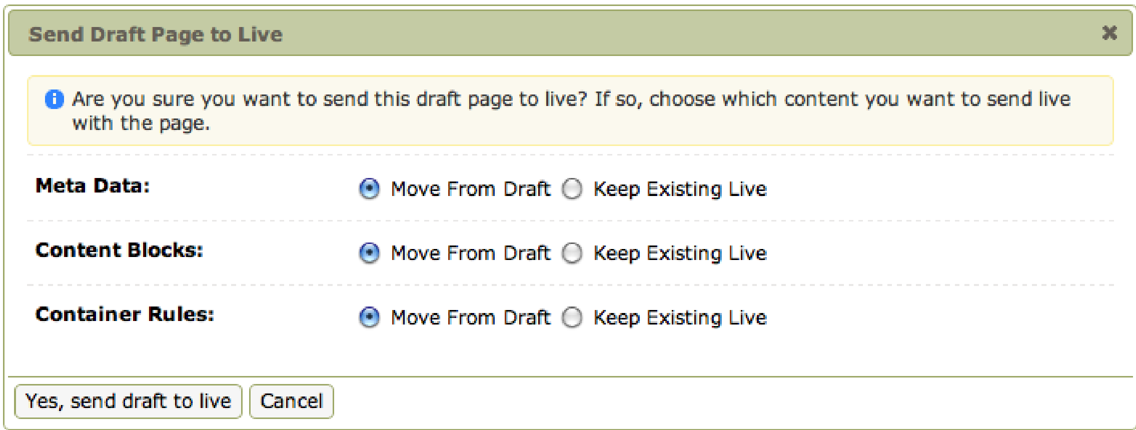
Your web site will now load in a new window. It will load the page you are managing in draft mode. You can easily toggle between the live and draft versions.

Sending a Draft to Live

Once you've finished creating your draft page you will want to send it live. You can do this by clicking on the **Send draft version live** button in the draft status box.

You will be prompted to confirm that you want to send the draft version live. If there is already a live version you will also need to confirm exactly which data you want to send live.

Figure 4.3. Sending a draft live when there is already a live page.



Sometimes you won't necessarily want to send all data live. For example, if you change the container rules of the live page after creating the draft page, the draft page will only have a copy of the old container rule set up. In this case, you may not want to copy the container rules from the draft page.

Click **Yes, send draft to live** to confirm sending the draft page live.

Discarding a Draft

If your page has both a live and a draft version and you no longer want the draft version, click the **Delete draft version** button.

You will be prompted to confirm that you want to delete the draft version.

Moving Pages

If you want to change where in your site belongs, use the pages tree view widget. Click-drag the page to a new location in the tree. You can either drop it on a page to add it to the bottom of the section, or you can be more precise and drag it between two other pages.

Re-Ordering Pages

Similar to moving pages to a new section, you can click-drag a page to a new location within its current section. When you click-drag a page you can see a line that indicates where in the tree it will belong if you drop it.

The page ordering is used for outputting a site map on your web site (using the **Pages Site Map** container rule). This is also commonly used for generating web site navigation.

Managing Protected Areas

Recite CMS allows you have protected areas on your web site that only certain users can access. This is useful for having a members-only section on your site.

Protecting your pages requires that you have at least one user directory set up for your site. For information about managing user directories, refer to the Managing Users chapter.

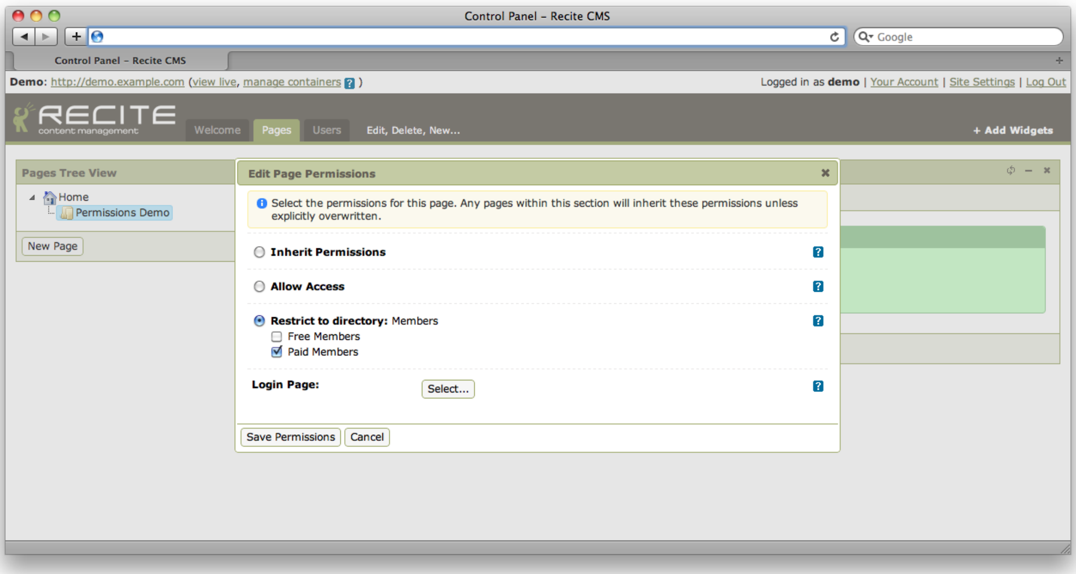
When you protect a page, all the pages within that section also become protected. It is possible to unprotect pages within a protected page.

Creating a Protected Area

To manage permissions for a page, click on the **Permissions** button when viewing a page. This will open a new dialog with various options for a protecting a page.

Before you create a protected, you must ensure that there is a log in page on your site. This is so users with credentials for accessing the protected area can authenticate. The log in page must contain a log in web form (see Managing Forms), and the page must not be protected.

Figure 4.4. Managing permissions for a page



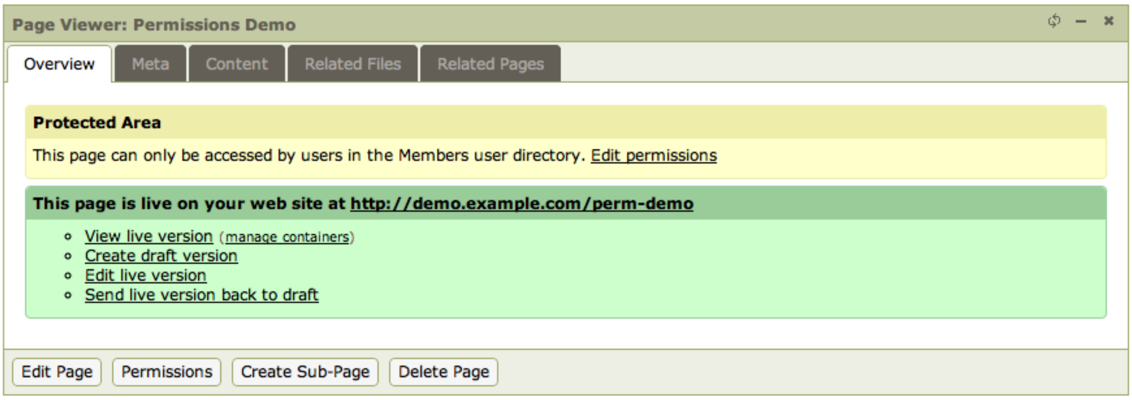
The default setting on this page is `Inherit permissions`. This means whether or not the page is protected depends upon its parent page. If its parent also inherits, then you must then consider the parent's parent (and so on).

To protect the page (and all of its sub-pages), select the **Restrict to directory** option beside the directory you want to give access to (if you only have one user directory then there will only be one to choose from).

If your user directory has one or more roles, you can choose to restrict access to any number of roles. If you don't choose any roles then any user in that directory will be able to access the protected area.

Click **Save Permissions** to the settings for that page. Once the page is protected, a yellow box will now appear in the page overview to indicate that it is protected. Additionally, all sub-pages that are also protected will display the same yellow box.

Figure 4.5. Page overview when a page is protected



If a non-authenticated user (or a user authenticated for a different user directory or non-matching user role) tries to access a page in the protected area, they will instead be displayed the login page.

Note

If a user is already authenticated but not for a valid directory or role, it may be more beneficial to show then a "permission denied" message instead of a log-in form. You can check the `$authenticated` variable in your log in form template to check for this.

Forcing a Page to be Unprotected

If you have a page inside a protected area that you don't want to be protected, all you need to do is open the permissions management page (click on the **Permissions** button when viewing the page that you want to be unprotected) and select the **Allow Access** option.

This can be useful if you want to store the log in page and a "reset your password" page within a members area.

URL Mapper

Recite CMS gives you the ability to map arbitrary URLs back to pages in your site. This can be useful if you have a legacy URL that you want to keep.

For example, if your former site didn't use Recite CMS and you upgraded to Recite CMS, you may have pages that are now accessible from a different URL. In this case, you can use the **URL Mapper** widget to manage mapped URLs (available from the widget browser in the `Page Management` category).

Tip

An alternative to using the URL mapper is to create a page type using the **Redirect** driver. This allows you to create pages (in the normal Recite CMS pages tree) to redirect to some other URL. This other URL can either be on your site or a third-party site.

Creating a New Mapped URL

To create a new mapped URL, click the **New Mapped URL** button in the **URL Mapper** widget.

A dialog will now appear with options for creating the mapped URL. Enter the URL you want to redirect from, then select the page in your site that you want to redirect to.

Click **Create Mapped URL** to create the mapping. Once it has been saved it is immediately active.

Note

When the page redirects, a HTTP 301 (Moved Permanently) status code is used.

Warning

If the URL you enter in the **Redirect From** field conflicts with a page that already exists on your site, then the URL mapping is ignored and the other page is used for that URL.

Editing a Mapped URL

To edit a mapped URL, click **Edit** link beside the mapped URL in the **URL Mapper** widget. A dialog will be shown with options for updating the mapped URL. Click **Save Mapped URL Changes** to save your changes.

Deleting a Mapped URL

To delete a mapped URL, click the **Delete** link beside the mapped URL in the **URL Mapper** widget. You will be prompted to confirm that you want to delete the URL mapping.

The mapping will be deactivated as soon as you have deleted it.

Managing Sub-Sites

Recite CMS allows you have any number of sub-sites in addition to your main web site. This allows you to create a version of your web site specifically for other devices (such as the iPhone or other mobile devices).

Each sub-site requires one or more domain to be viewable. Domains can be set up by your administrator. Sub-sites are managed using the **Sub-Sites** Control Panel widget.

Creating a New Sub-Site

To create a new sub-site, click the **New Sub-Site** button when viewing the list of sub-sites.

You will then be prompted to enter a title for the sub-site. This title is the name given to page that is subsequently created in the page tree to represent the site. You can change this title by editing the page.

Next, select one or more domains used to access the sub-site. Any domains not used by sub-sites are used to access the main site.

Click **Create Sub-Site** the create the new sub-site. A new page will be created in the page tree at the same level as your main home page. You can then create and manage sub-pages just as you would normally.

Editing a Sub-Site

Editing a sub-site allows you to choose which domains correspond to the sub-site. To make changes to the actual sub-site page, use the normal page editing functionality. To edit a sub-site, click the **Edit** button beside the sub-site.

You can then choose which domains to use. Domains assigned to other sub-sites are not displayed in this list.

Click **Save Sub-Site Changes** to save your changes.

Deleting a Sub-Site

To delete a sub-site, click the **Delete** button beside the sub-site. You will be prompted to confirm this access. Click **Yes, delete the sub-site** to confirm this action.

Warning

When you delete a sub-site, all pages from the sub-site are deleted.

Chapter 5. Managing Templates

Templates are used to control the layout of pages in your web site. It is perhaps the most difficult aspect of creating your web site with Recite CMS, however, once it has been done initially you will rarely need to make further changes to your templates.

All templates are written using Smarty Template Engine syntax. You can find the complete Smarty manual at `http://smarty.net/manual/en/`, or you can refer to the Template Writing Guide appendix in this guide.

Similar to how files are structured in Recite CMS, templates are stored in folders. These folders are separate to file folders.

There are many different types of templates, each of which is used in a different situation on your web site. For example, one type of template is used for listing out calendar events, while another is used for display search results.

This chapter covers how to manage templates and template folders in Recite CMS.

Getting Started

There are several different Control Panel widgets available to help you manage templates. These are as follows:

- **Template Browser**. This widget lists all folders and templates within the active folder. You can click on a folder to set it to the active folder, or you can click on a tepmlate to load it in the **Template Editor** widget.

- **Template Manager Tree View**. This widget shows all template folders, organised by their hierarchy. You can expand or contract the display as required.

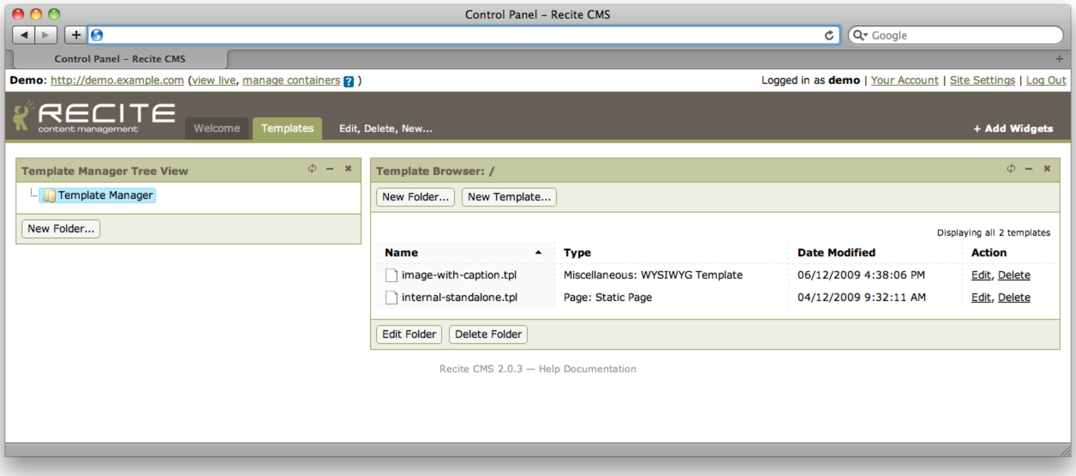
- **Template Editor**. This widget is used to edit templates directly through the Control Panel. You can't manually add this widget to a tab - it is loaded when you click on a template in the **Template Browser** widget.

- **Template Documentation.** This widget is used to list data that is available for output in a template. Each template type has a different set of data associated with it.

You can either add these widgets manually (they can be found in the `Template Management` category in the widget browser), or you can create a new tab using the **Templates** pre-defined layout.

The following figure demonstrates this layout. This tab is a two-column layout with a wide right-hand column. In the left column is the **Template Manager Tree View** widget, while in the right column is the **Template Browser** widget.

Figure 5.1. Sample tab layout for managing templates



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Templates** tab.

Managing Folders

Templates in Recite CMS are organised into folders. You can add, edit and delete folders as required. Once created you can create templates in the folder.

Creating a Folder

There are two ways to create a folder. Firstly, you can select the **New Folder** button from the template browser. The newly-created folder will be created within the currently active folder.

Secondly, you can click **New Folder** at the bottom of the tree view widget. The newly-created folder will be created within the currently selected folder.

After clicking either of these buttons a dialog box will appear with options for creating the new folder. Enter a name for the folder and click **Save New Folder**.

After the folder has been created the template browser and tree view will both be updated to include the new folder.

Editing a Folder

To rename an existing folder, you can either click the **Edit** button beside the relevant folder in the file browser, or you can click the **Edit Folder** button at the bottom of the template browser (this is used for editing the active folder).

A dialog will now appear which is the same as the folder creation dialog. Update the details as required and click **Save Folder Changes**.

The template browser and tree view will now reflect this change.

Moving a Folder

Moving a folder involves using the tree view widget. Drag the folder you want to move to its new location within the tree and its new position will be saved.

Warning

This will also move all its children folders and templates.

Deleting a Folder

Folders can be deleted from within the file browser widget using one of two methods. Firstly, you can click the **Delete** button beside the folder you want to delete.

Secondly, if you want to delete the currently loaded folder click **Delete Folder** at the bottom of the widget.

Before any folders are deleted you will be prompted to confirm the deletion.

Warning

Deleting a folder will delete all folders and templates within the folder. Deleting a folder cannot be undone.

Manage Templates

Each template you create in Recite CMS serves a different purpose - one template might list calendar events for the current month, while another may display search results.

Typically a single page is made up of several templates - there will be a template which outputs the key elements of a HTML page, while within it there may be several container rules, each using a different template.

Tip

Refer to the Administration Mode chapter for details about Container Rules and how to manage them.

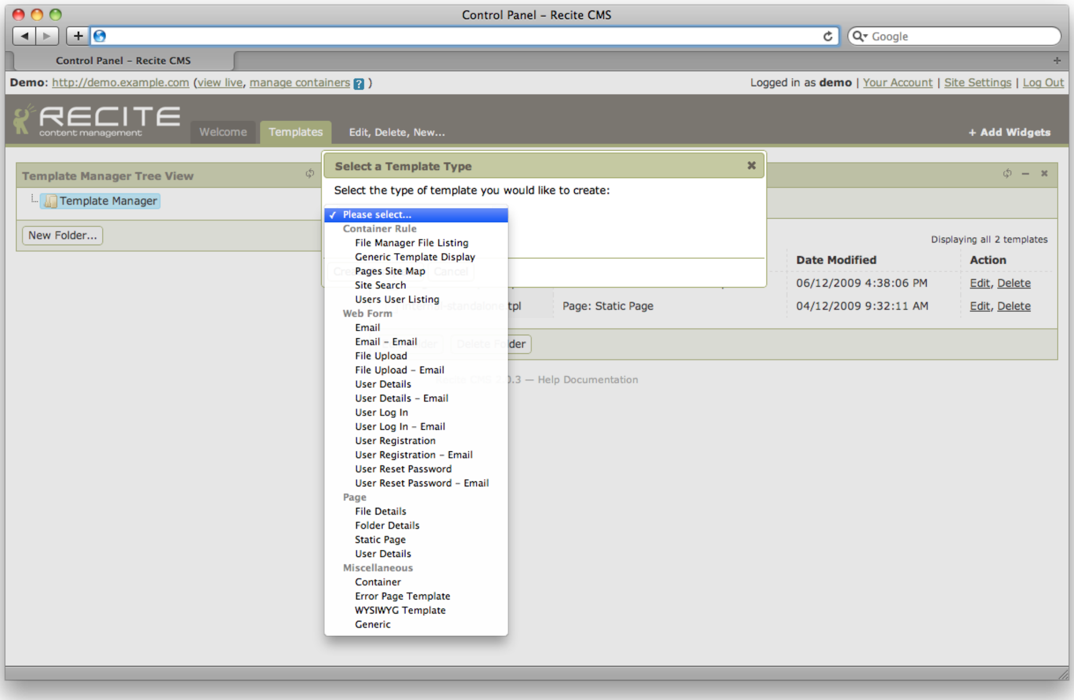
This section tells you how to manage templates within Recite CMS. Note however that this section's purpose is not to instruct you how to write templates. Refer to the Template Writing Guide appendix for details about how to write templates.

Creating a Template

New templates are created by clicking the **New Template** button on the template browser. When the new template is created it will be created in the folder that is active in the template browser when you click the button.

Clicking the **New Template** button will result in dialog appearing, from which you must choose a template type. The type of template you choose will determine the data available in the template, as well as where the template can be used in your site.

Figure 5.2. Selecting a template type



The types of templates are split into various categories. For example, a template type that is used for rendering a container rule is under the **Container Rule** heading.

Tip

There is also a section for form template types. There are two different template types for each form available in Recite CMS. One is for rendering the form on the web site, while those ending in `Email` are used for emails sent after the form is submitted. Refer to the Managing Forms chapter for more details.

Once you have chosen a template type, click the **Create Template** button. This will result in the **Template Editor** widget being loaded.

You can then enter a name for the template in the **File Path** field. If you want to include this template from another template this is the name you use to refer to the template.

Tip

How you decide to name your templates is up to you, but regardless of how you should name them consistently. As a guide, all templates I create are named in lower-case, use hyphens instead of spaces, and end in `.tpl`. For example, I might call a template `two-column-layout.tpl`.

Next, enter your template data in the main editor area of the widget. This is where the Smarty-style syntax is used. Refer to the Template Writing Guide for more details.

Tip

If required, you can also enter a template description. This may be a useful instruction to other people who update the templates in your site (or useful to yourself in the future when you've forgotten the reason for a template!).

Once you are done editing the template, click the **Save Template** button to save your changes. The widget will remain open so you can make further changes if required. Alternatively, click **Save and Close** to save your changes and close the widget.

When you attempt to save your template, Recite CMS will validate your template to ensure there are no syntactical errors. You will be prompted if there are any mistakes found.

If you have made changes to a template and not yet saved them, the template editing area will have a red border and red-tinted background colour. This is simply to remind you to save.

Loading a Sample Template

Most of the template types in Recite CMS have sample templates associated with them that you can use as a basis for creating your template. They are generally not overly advanced in their layout or display, but should be sufficient in demonstrating how the data should be used.

If a template type has samples available, a drop-down will appear between the **Description** field and the template editing area. Select a sample from the drop-down and click **Load**.

Warning

Loading a sample template will replace the editing area with the sample. If you don't want to save the changes, simply close the widget (you may be prompted to confirm that you want to discard the changes).

Getting Template Help

Each template type has different data associated with it, since the different templates of each type are used in different areas of your site.

For a list of the data that can be used in your template, click the **Show Help** link beside the template type label.

This will open the template documentation widget, listing all of the data for that template type.

It might not be clear initially how to use this data, but if you compare the documentation with a sample template (as well as reading Template Writing Guide) it should become clearer.

Editing a Template

To edit a template, click the **Edit** link beside the name of the template in the template browser. This will open the template in the **Template Editor** widget. At this point, you can edit and save your template just as you would when creating a new template.

If you have made changes to a template and not yet saved them, the template editing area will have a red border and red-tinted background colour. This is simply to remind you to save.

Changing a Template's Type

If you accidentally create a template using the wrong template type, you can change this by clicking on the **Change Type** button when viewing the template.

You will then be prompted to select a new type. Select the type you want to change the template to, then click the **Save Template Type** button.

Resizing the Template Editor

You can make the template editing area bigger or smaller by dragging it up or down from the bottom of the area.

Your size preference will be saved for that particular widget.

Deleting a Template

To delete a template, click the **Delete** link beside the relevant template in the template browser.

Before you can delete a template you must confirm that you want to delete it. A confirmation dialog will appear, listing the places where the template is currently being used. This is to make you aware that deleting the template may affect the correct display of your web site.

Warning

This list of places where the template is being used may not be exhaustive.

Click **Yes, delete the template** to delete the template.

Duplicating a Template

Recite CMS allows you to duplicate an existing template. To do so, load the template in the template editor widget and click the **Create a Copy** button. You will be prompted to confirm this action.

The newly-created template will reside in the same folder as the original template. It will share the same template name, as well as being prefix with `Copy of`.

Note

The template will be duplicated from its last save point. In other words, if you make changes to the original template then duplicate it before saving the changes, those changes will not be included in the copy.

Moving a Template

You can move a template to a different folder by dragging the template by the drag handle. You will need to drop it onto a folder in the **Template Manager Tree View**.

You can move multiple templates at once by checking all of the templates you want to move, then dragging them all using the drag handle of one of the selected templates.

Restoring an Old Version of a Template

If you have access to the Recite CMS versioning module, you can easily revert back to an old version of a template. This is useful if you make changes to a template that you want to undo.

To view old versions of any template, click the **View Revisions** button while viewing the template. You will then be shown a dialog which lists all of the different versions that are saved.

The current version will be selected by default, but you can select an older version from the list to see the differences. If you want to restore that older version, click the **Restore** button. The older version will now be restored.

When an older template is restored, it is saved as yet another revision of the template. This means you can revert back to the version you just switched from.

Chapter 6. Managing Forms

Recite CMS allows you to manage forms that can be published on your web site. There are a number of pre-defined form types, each of which perform a different task.

For example, there is a form used for users to register on your site, a form for allowing them log in and another for letting them update their details. There is also a form that allows people to upload a file via their web site.

> **Tip**
>
> Custom form types can also be developed for Recite CMS. Refer to the Recite CMS developer documentation at `http://docs.recite.com.au`.

Getting Started

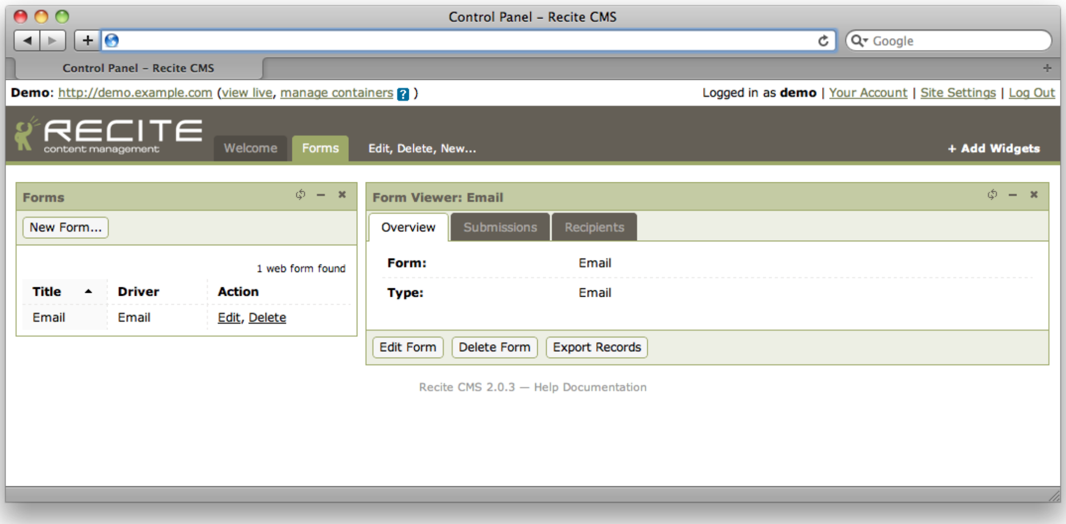
There are two different Control Panel widgets available to help you manage forms. These are as follows:

- **Forms**. This widget lists all forms that exist for your site.
- **Form Viewer**. This widget is for viewing the details of a single form. You cannot add this widget manually - it is automatically created when you click on a form in the **Forms** widget.

The forms widget can be added manually (from the `Form Management` category in the widget browser), or you can create a new tab using the **Forms** pre-defined layout.

The following figure demonstrates this layout. The tab is a two-column layout, with the **Forms** widget in the left column and a placeholder for viewing forms in the right column.

Figure 6.1. Sample tab layout for managing forms



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Forms** tab.

Managing Forms

The **Forms** widget lists all forms in your site, as well as allowing you to create new forms. Clicking on an index in this list allows you to view the form.

Creating a Form

To create a form, click on the **New Form** button in the forms widget. A drop-down will appear, allowing you to choose the type of form you want to create.

Once you have selected the form type, a dialog will appear allowing you to specify the form details. The fields that are displayed will depend on the form type, but all forms share some of the same fields.

Firstly, all forms have a title. This is used to identify the form from within the Control Panel. Secondly, you must decide if you want to protect the form using *CAPTCHA* (a simply phrase users must enter to prove they are human and not an automated form submitter). This is covered in further detail later this chapter.

Once you have entered the form details, click **Create Web Form** to create the form. The forms widget will update to display the new form. Click on the new form to open it in the form viewer widget.

Editing a Form

If you want to edit an existing form, you can either click the **Edit** link beside a form in the forms widget, or click the **Edit Form** button when viewing the form.

A dialog will appear, allowing you to update the form. This form is very similar to the form creation dialog. Click **Save Web Form Changes** to save your changes.

Managing Form Recipients

Recite CMS allows you to send out a series of emails every time a form is submitted on your site. This can be useful for a number of reasons.

For example, you can have a "send to friend" form that sends an email to a person the submitter specifies. Or you could have a contact form that sends notification to your site administrator, as well as sending confirmation back to the submitter.

Each email you create for a form can have its own template, as well as its own list of recipients.

To view and manage recipients for a form, click on the **Recipients** tab when viewing the form.

Creating a Form Email Template

Before you can add a recipient you must create an email template. Refer to the Managing Templates chapter for details on creating a template.

When creating the template, you must select the appropriate template type for that form type. For every type of form there is a template type for displaying the form on your site, and a type for emails for that form (the type ends in `Email`).

For example, if you wanted to create a template for a **File Upload** form, select the template type of **File Upload - Email**.

Note

When you create an email template you will be shown three fields: one for the subject, one for the "plain text" portion of the email, and one for the "HTML" portion of the email.

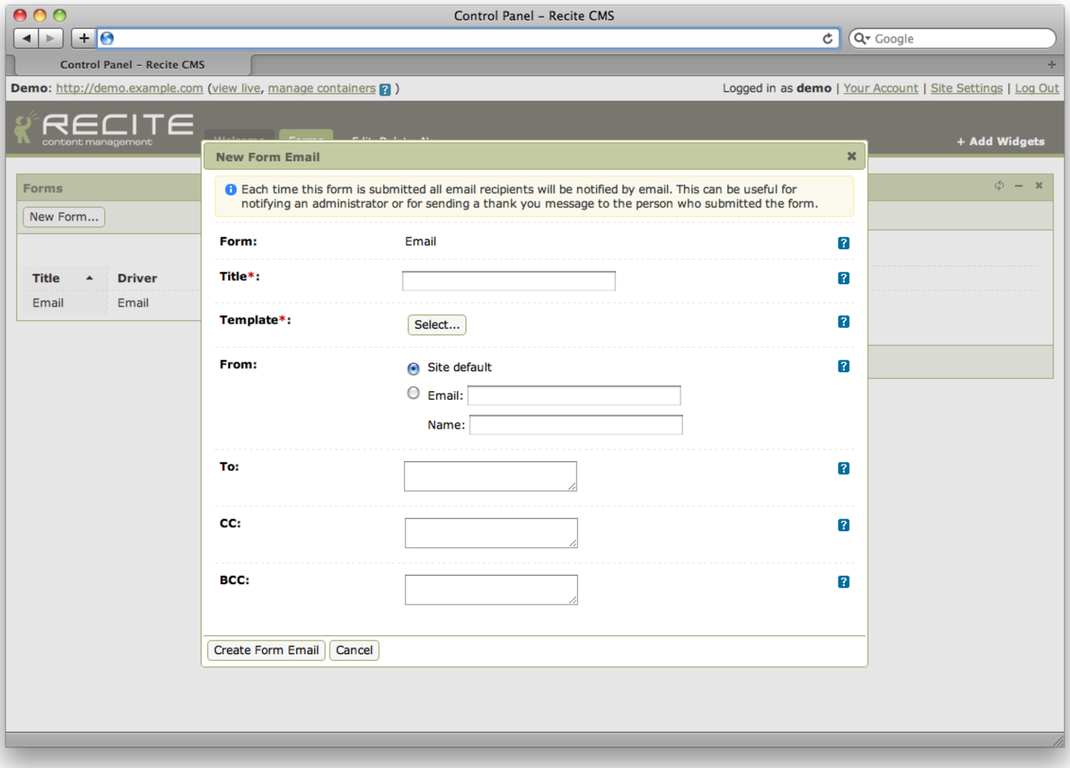
You must include the subject, and even if you are including a HTML email it is recommended that you always include a plain text version for those users that don't accept HTML emails.

Adding a Form Recipient

To add a new form recipient, click the **Add** button at the bottom of the list of recipients.

You will then be shown a dialog with options to add a new recipient. This is shown in the following figure.

Figure 6.2. Adding a form recipient



Select the template you created in the previous step, as well as entering one or more recipients who will receive the email.

Click the **Create Form Email** button to save the new email.

Editing a Form Recipient

To edit a form recipient, click the **Edit** link beside the email you want to edit when viewing the list of recipients.

Make any changes required then click the **Save Form Email Changes** button.

Removing a Form Recipient

To remove a form email, click the **Delete** link beside the email in the list of recipients.

You will be prompted to confirm that you want to delete the email.

Deleting a Form

To delete a form from your web site, you can either click the **Delete** link beside the form when viewing the list of forms, or by clicking the **Delete Form** button when viewing the form.

You will be prompted to confirm that you want to delete the form. Click **Yes, delete the form** to delete the form.

Viewing Form Submissions

Every time a form submitted a record is stored, allowing you to view all records. This is useful for forms such as "Contact Us" type forms, where you may want to refer back to previous inquiries.

Note

Some form types may not store form submissions.

To view previous form submissions, click on the **Submissions** tab when viewing a form. Clicking on a form record will open a dialog displaying more details.

You can delete individual form records by clicking on the **Delete** link beside the record you want to delete.

Exporting Form Submissions

Recite CMS allows you to export form submissions to a CSV (comma-separated values) file. To do so, click the **Export Records** at the bottom of the form viewer.

A new dialog will appear, allowing you to select the date range of records you want to export. You can leave either of these fields blank.

Click **Download File** to download the CSV file. Click **Close** once you are done.

Adding a Form To Your Site

Once you have created a form, it is only of any real use if you add it to your web site. This section tells you how to add it to your site.

Create a Form Template

In order to display your form on your web site, you must create a template used for outputting the form. For details on creating a template, refer to the Managing Templates chapter.

The template type to use must correspond with the type of form you are creating. For example, if you're creating a template for a **File Upload** form, use the template type **File Upload** under the `Web Form` heading.

Adding the Form Container Rule

Next you must add the form to your web site. This is achieved by adding the **Web Form** container rule to your site. For details on managing container rules, refer to the Administration Mode chapter.

Select the form you want to add, as well as the template you created in the previous step.

Once the form has been added you can now try to submit it. Depending on the type of form, you should see a record in the form submissions log once you successfully submit it.

Adding CAPTCHA to Forms

Recite CMS allows you to easily add a CAPTCHA field to your forms if you want to. You can add CAPTCHA both as an image or as a sound clip (this allows vision-impaired users to still submit your forms).

What is CAPTCHA?

CAPTCHA stands for *Completely Automated Public Turing test to tell Computers and Humans Apart*. It is used to ensure that it is a person filling out a form, as opposed to another computer automatically submitting a form. It is a basic security method to help prevent abuse of your web site.

Many of the sample form templates include code to output the CAPTCHA image and a form input for typing to code. To help with outputting CAPTCHA, Recite CMS provides the `{captcha}` template tag. This tag returns the URL where the CAPTCHA image is located. You must then provide a form input with the name `captcha`.

Tip

The CAPTCHA URL should then be used in a HTML `<img />` tag.

Alternatively, you can retrieve the link to an audio version of the CAPTCHA by including `audio=true` to the `{captcha}` tag. The sound file is a `wav` file which pronounces a series of words (in English), each one beginning with the corresponding letter in the CAPTCHA.

Note

If you include the audio CAPTCHA on your site, include basic instructions on the form so vision-impaired users know how to use the sound file.

You can check if the form requires a CAPTCHA value by checking the `$form.captcha` value. The following example shows how to check for this value and output the CAPTCHA if required.

Example 6.1. Using a CAPTCHA in your form template

```
{if $form.captcha}
    <div>
        <img src="{captcha}" alt="" />
        (<a href="{captcha audio=true}">listen</a>)
    </div>

    <div>
        Enter code:
        <input type="text" name="captcha" value="{$form.values.captcha|escape}" />
    </div>
{/if}
```

In this example, we first check that CAPTCHA is enabled for the form. If it is, we output the CAPTCHA image and a link to the audio CAPTCHA.

We then include a form input so the user can enter the CAPTCHA. Additionally, we pre-populate the form input with a previously-entered value. This is done in case they entered the CAPTCHA correctly but there was an error elsewhere in the form, resulting in the same form being shown again.

Chapter 7. Managing Categories

Recite CMS allows you to manage a list of categories, which can then be assigned to other web site data such as calendar events or pages.

You can only maintain a single list of categories, however, every category can have any number of sub-categories, allowing you to segment various category lists as required.

Additionally, you can store a description with all categories, as well as assocating any number of files with a category.

This chapter informs you how to manage your category list, as well as covering the options for displaying categories on your web site.

Getting Started

There are two Control Panel widgets available to help you manage categories. These are as follows:

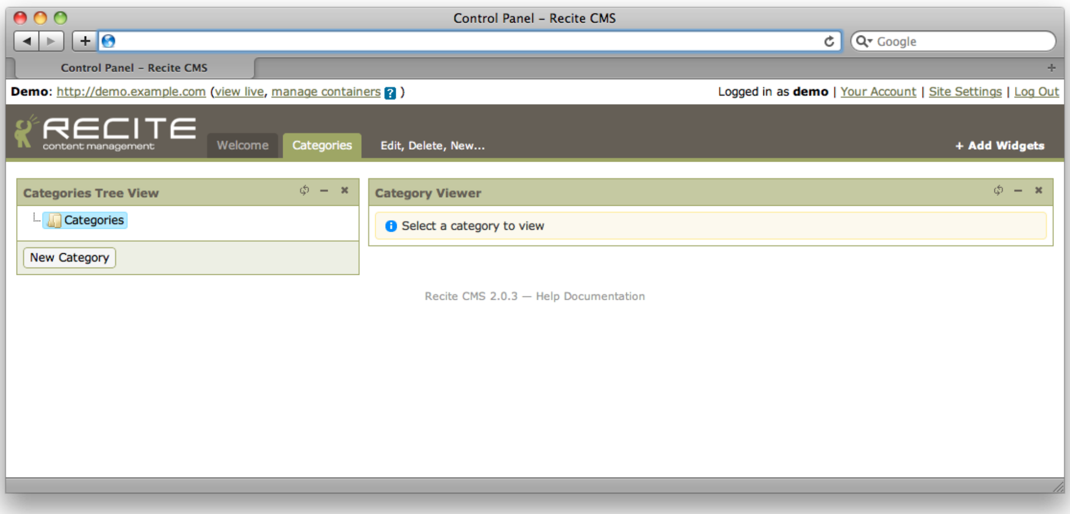
- **Categories Tree View**. This widget shows all categories in the site, organised by their hierarchy. You can expand or contract the display as required. When you click a category in the tree view, it will be opened in the category viewer widget.

- **Category Viewer**. This widget is used to view and manage the details of a single category. You can't add this widget manually - it is automatically loaded when you click on a category in the tree view widget.

You can either add the tree view widget manually (it can be found in the `Category Management` category in the widget browser), or you can create a new tab using the **Categories** pre-defined layout.

The following figure demonstrates this layout. This tab is a two-column layout with a wide right-hand column. In the left column is the **Categories Tree View** widget, while in the right column is the **Category Viewer** widget.

Figure 7.1. Sample tab layout for managing categories



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Categories** tab.

Managing Categories

This section instructs you how to create, edit and delete categories.

Creating a Category

To create a new category, click the **New Category** button in the tree view widget. The newly-created category will be a sub-category of whichever category was selected in the tree.

The category creation dialog will now appear, allowing you to enter the name of the category, as well as the option of setting a comprehensive description for the category using the Recite CMS WYSIWYG editor.

Note

For details on using the WYSIWYG editor, refer to the WYSIWYG Editor Guide appendix.

To save the category, click the **Create New Category** button. The new category will now appear in the category tree. If you click the category, it will be opened in the category viewer widget.

Tip

As an alternative to clicking **New Category** in the tree view, you can also click **Create Sub-Category** when viewing a category.

Editing a Category

To edit a category, click the **Edit Category** button on the category viewer widget. This will open a dialog similar to the category creation dialog.

Make any changes as required then click the **Save Category Changes** button.

Associating Files With Categories

You can associate any number of files that exist on your web site with a category. This is useful if you are listing the categories on your site and you want to display an image with each category.

To associate files with a category, click the **Related Files** tab when viewing a category.

By clicking on the **Select** button that appears you can browse files in your web site. Choose the files you want to link to the category.

To save the related files, click the **Save Related Files** button.

Deleting a Category

To delete a category, click the **Delete Category** button when viewing the category. You will prompted to confirm that you want to delete the category.

Warning

When you delete a category, all sub-categories are also deleted. This operation cannot be undone.

Re-Organising Categories

If you want to move a category to a different section (within the list of categories), you can use the category tree view. Click-drag the category you want to move. Drop the category onto a new parent and its new location will be saved.

Assigning Categories to Other Content

Once you have created one or more categories, you can link them to other content in your site. For instance, you can categorise your web site pages or calendar events.

Assigning categories works similarly how you linked files to a category in the previous section.

For example, when viewing a page in the **Page Viewer** widget, click on the **Categories** tab. You can then click **Select** button to open the category selector.

Once you have selected categories, click the **Save Categories** button.

Note

If you delete a category, this will also unlink the category from any related content.

Displaying Categories On Your Site

There are several different ways to display category data on your web site. This section covers some of the ways you can do this.

Including Categories With Linked Content

When you output content that is linked to categories (such as calendar events), the categories that are linked to each event will automatically be included in the template data.

This data is available from the `linked.categories` variable in the content. For example, if you have a list of events in a variable called `$content`, you can access categories in the following manner.

Example 7.1. Accessing category data from a list of calendar events

```
{foreach from=$content item=event}
    {foreach from=$event.linked.categories item=category}
        {* output each category here *}
    {/foreach}
{/foreach}
```

For details about the data that is available for each category, refer to the **Template Documentation** widget. The **Categories Listing** template type lists the available data.

Outputting a List of Categories

Recite CMS includes a container rule called **Categories Listing**, which includes a number of different options for outputting categories.

For details on managing container rules, refer to the Administration Mode chapter.

Creating a Tagspace

Recite CMS includes a page type driver called **Category Tagspace**, which allows you to create a page in the context of one or more categories.

Creating pages that use this type make it possible to list out content related to only that category.

To create a tagspace, you must first create a page type using the **Category Tagspace** driver. Once you have created the page type you can create a tagspace page using the newly created page type.

Note

For more details about managing page types and pages, refer to the Managing Pages chapter.

For example, if you create a tagspace page with the URL value of `tag`, you can load the tag space for a category called `music` with a web site URL of `/tag/music`. If your music category is a sub-category of `arts`, the full URL would be `/tag/arts/music`.

You can load a tagspace of multiple categories by separating each character with the `|` character. For example, to load a tagspace of the categories `music` and `movies`, you can use `/tag/music|movies`.

Outputting Content Based on Categories

Several of the available container rules include options for filtering content by category. For example, if you add a list of calendar events to a *tag space page* (covered in the previous section), you can choose to include only events from the active category.

For details on managing container rules, refer to the Administration Mode chapter.

Chapter 8. Managing Comments

Recite CMS allows you to add commenting functionality to your web site. This means you can allow people to submit comments about content on your site.

For example, if you want to publish a blog (using the calendar events functionality of Recite CMS), you can allow your readers to submit comments for each of your blog posts.

Comments are organised into a series of groups. If you want to add commenting to calendar events, you would create a comments group specifically for holding those comments. In that case, all comments (regardless of the event they belong to) are stored in the same group.

Each comment group can have a different list of required fields. This means for calendar event comments the submit form will have one set of fields, while submitting comments for a page might have a different set of fields.

Getting Started

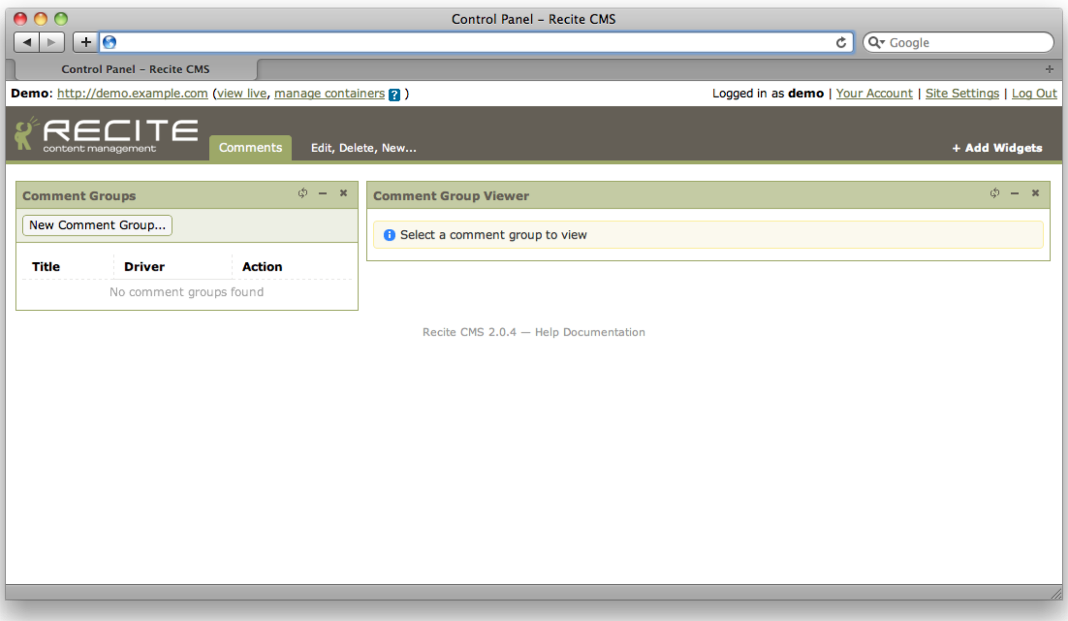
There are two Control Panel widgets available to help you manage comment groups. These are as follows:

- **Comment Groups Listing**. This widget shows all comment groups in the site. Click on a comment group to open it in the comment group viewer.
- **Comment Group Viewer**. This widget is used to view and manage the details of a single comment group. You can't add this widget manually - it is automatically loaded when you click on a group in the comment groups listing.

You can either add the comment group listing widget manually (it can be found in the `Comments Management` category in the widget browser), or you can create a new tab using the **Comments** pre-defined layout.

The following figure demonstrates this layout. This tab is a two-column layout with a wide right-hand column. In the left column is the **Comment Groups View** widget, while in the right column is the **Comment Group Viewer** widget.

Figure 8.1. Sample tab layout for managing comments



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Comments** tab.

Managing Comment Groups

This section instructs you how to create, edit and delete comment groups.

Creating a Comment Group

To create a new comment group, click on the **New Comment Group** button. You will then be required to choose the type of comment group you want to create. For example, if you want to create a comment group to store comments on calendar events, select the **Calendar Events** option from the drop-down.

Next you will be shown the group creation dialog. Firstly, enter a title for the group. This is used to identify the comment group from within the Control Panel.

Next, select whether or not comments require approval. If comments require approval, they will not be displayed on your web site until an administrator has approved them in the Control Panel (this is covered later in this chapter).

Tip

If you want to be notified whenever a comment is submitted so you can log-in and approve it, add an email recipient to the **Submit Comments** form. Creation of this form is covered later in this chapter.

Next, select the list of fields you want to be completed for every comment that is submitted. You will likely need to include the field to hold the comment, as well as fields so users can enter their name and email address. Refer to Managing Custom Field Lists for details on managing a custom field list.

Click **Create Comment Group** to create the comment group. Once it has been created it will appear in the comment groups listing widget. Click on the widget to open it in the comment group viewer.

Editing a Comment Group

To edit a comment group, either click the **Edit Group** button when viewing the comment group, or click **Edit** beside the group in the comment groups listing. Update the group as required, then click **Save Comment Group Changes**

Note

If you change a comment group so comments no longer require approval, any existing comments that are not approved will automatically be approved.

Deleting a Comment Group

To delete a comment group, either click the **Delete Group** button when viewing the comment group you want to delete, or click the **Delete** link beside the comment group in the comment groups listing.

You will be prompted to confirm that you want to delete the comment group.

Warning

Deleting a comment group will also delete all comments in that group. This operation cannot be undone.

Managing Comments

When a comment has been submitted you can view it by viewing the group it belongs to. From here you approve (or unapprove), edit and delete the comment.

Note

You cannot create new comments via the Control Panel. This may change in the future, but for now, if you want to manually add a comment, add it from your web site.

You can click on any comment in the table. Doing so will open a dialog which displays all the data stored with the comment.

Approving or Unapproving a Comment

A comment won't be visible on your site until it is approved. This allows you to moderate submitted comments and avoid having anything unsavory on your site. When you create a comment group you can choose whether or not comments need approval.

If comments in the group require approval, you can do this when browsing the comments in the comment group. Click the **Approve** button beside a comment to approve it. Alternatively, you can select multiple comments at once then approve them all at once by clicking the **Approve** button at the bottom of the table.

Likewise, you can unapprove comments in the same manner. Unapproving comments is not a feature you would typically use - if you have a comment you no longer want you would typically delete it.

Editing a Comment

Sometimes a comment will be submitted that you want to make some minor changes to. You can do this by clicking the **Edit** link beside the comment.

You will then be shown a dialog where you can make any changes as required. Click **Save Comment Changes** once you have made any required changes.

Deleting a Comment

You can delete a comment by clicking **Delete** beside the comment you want to delete. To delete multiple comments at once, select all the comments to delete and click **Delete** at the bottom of the table.

You will be prompted to confirm deletion before any comments are deleted.

Warning

This operation cannot be undone.

Viewing Comments Linked to Content

When you view comments using the comment group viewer widget, you will see all comments that belong to the group. For example, if your comment group holds comments about calendar events, all comments will be shown, regardless of the calendar event they are linked to.

You can also view all comments linked to a particular content item. For example, if you want to see all comments linked to a specific calendar event, load the calendar event in the **Calendar Event Viewer** widget and click the **Comments** tab.

Adding Comments To Your Site

This section tells you how to add a comments to your web site. In this example we will add comments to calendar events. This firstly requires that you create a comment group using the **Calendar Events** type.

Additionally, you must have a page that displays a calendar event. This must be a page that uses the **Calendar Event Details** page type driver. We will be added the comments to this page.

Note

Refer to the Managing Pages chapter for details on managing pages and page types.

Create Templates

The first step is to create templates. There are two templates required: a form template for submitting a comment, and a template to list out comments on the page.

Note

For more details about creating and managing templates, refer to Managing Templates.

To create the form template, create a new template using the **Comment Submit** type. You can use the sample template available to create the form.

Tip

If you want to send emails when the user submits a comment (either to an administrator or a confirmation message for the user), you will need to create templates for these emails too. The template type to use is the **Comment Submit - Email**.

Next, create a template for listing comments. Use the **Comments Listing** template type (under the `Container Rule` heading).

Add Comments to Your Site

The next step is to add a comments submission form to your site. Before you can do this you must create the form in the Control Panel. For details about creating forms refer to the Managing Forms chapter. The type of form to create is **Comment Submit**.

When creating the form you must select which comment group the form is connected to. Therefore, if you have multiple comment groups, you will need a separate form for each group.

Once you have created the form, add it to the calendar event details page using the **Web Form** container rule. For more details about managing container rules, refer to Administration Mode. Use the form template you created in the previous step.

To display comments on your site, add the **Comments Listing** container rule to the calendar event details page. Use the template you created in earlier step for displaying the comments.

Note

It's possible that a single event could have many comments linked to it. Because of this, you should split up comments into multiple *pages*. The comments listing container rule provides options for achieving this.

Chapter 9. Managing Search

Recite CMS comes with a built-in search solution, allowing you to easily add a search feature to your web site.

This feature works by allowing you to create one or more *search indexes*. A search index contains all the data for a single set of data.

Each record in a search index is referred to as a document.

For example, if you want to let people search within your uploaded PDF documents, you can create a search consisting of only your PDF documents. You can have as many indexes as you like, and you combine as many as required on your search forms.

This chapter will instruct you how to create and manage your search indexes, as well as how to create a search form to add to your web site so users can search.

Getting Started

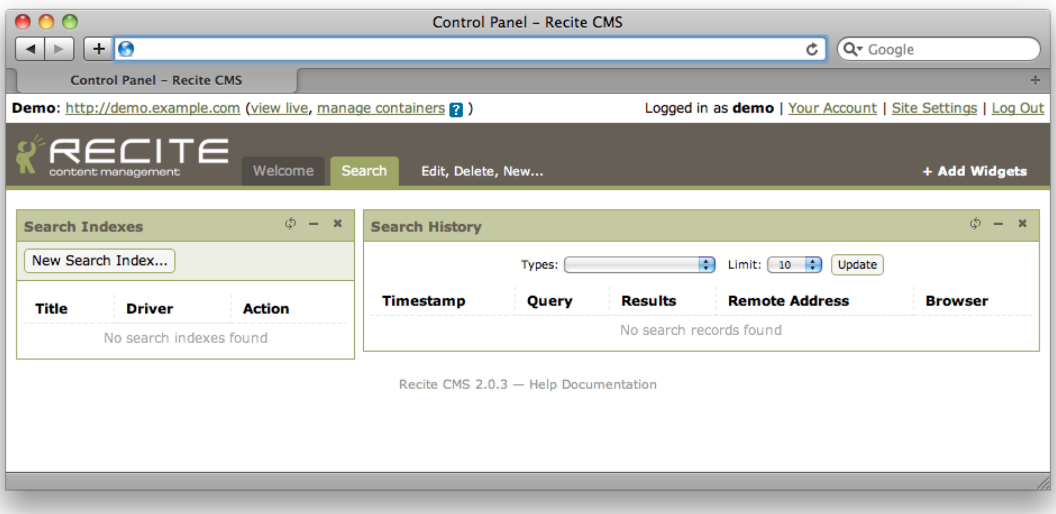
There are three different Control Panel widgets available to help you manage search indexes. These are as follows.

- **Search Indexes**. This widget lists all search indexes that exist for your site.
- **Search Index Viewer**. This widget is for viewing the details of a single search index. You cannot add this widget manually - it is automatically created when you click on a search index in the search indexes widget.
- **Search History**. This widget lists searches that have been performed on your site.

These widgets can be added manually (from the `Search Management` category in the widget browser), or you can create a new tab using the **Search** pre-defined layout.

The following figure demonstrates this layout. The tab is a two-column layout, with the **Search Indexes** widget in the left column and the **Search History** widget in the right column.

Figure 9.1. Sample tab layout for managing search



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Search** tab.

Managing Indexes

The **Search Indexes** widget lists all search indexes in your site, as well as allowing you to create new indexes. Clicking on an index in this list allows you to view the search index.

Creating an Index

To create a new search index, click the **New Search Index** button in the **Search Indexes** widget. You will then be able to choose the type of the search index you want to create.

For example, if you want to create a search index consisting of your web site files, choose **File Manager: Files**.

Tip

If you want to index a specific type of data then you can develop a custom search index driver. Refer to the Recite CMS developer documentation at `http://docs.recite.com.au`.

The search index creation dialog will now appear, allowing you to specify the details of the index. The exact details to specify will depend on the type of search index.

All search indexes must have a title - this is used to identify the index from within the search indexes widget. Click the **Create Search Index** button to create the index.

Once the index has been saved the search indexes will update to show the new index. Recite CMS will schedule the newly-created index to be built at the next maintenance update (typically within the next few minutes).

To view the new index, click on its row in the search indexes widget. The index viewer will then be loaded.

Editing an Index

To edit an index, you can either click the **Edit** link next to the respective index in the search indexes widget, or you can click the **Edit Index** button on the search index details widget.

A dialog will now open, allowing you to make any changes as required. Click **Save Search Index Changes** to save your changes.

The index will then be scheduled to be rebuilt.

Rebuilding an Index

You can manually rebuild an index either by clicking on **Rebuild** in the search indexes viewer, or by clicking **Rebuild Index** when viewing the widget. You will then be prompted to confirm the rebuild.

Because rebuilding an index can be time consuming, it does not occur in real-time when you choose to rebuild the index. Instead, it occurs in the background within the next few minutes.

Querying an Index

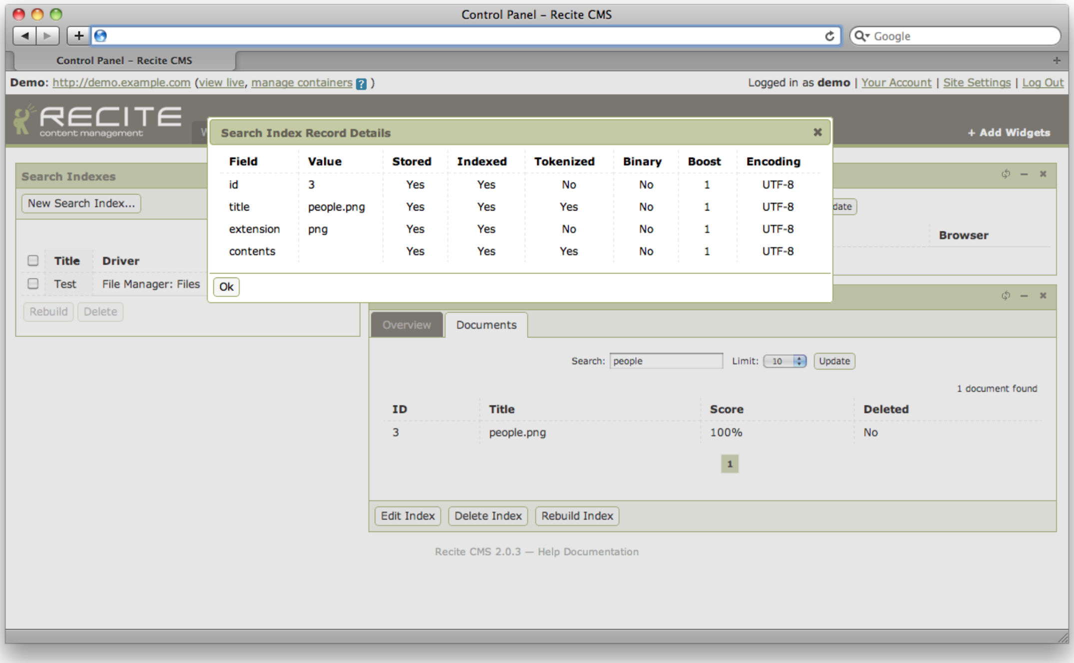
If you are using very specific options for indexing data (such as ensuring only files of a certain size are included), you may want to check which documents have been indexed to ensure your index criteria are correct.

To see all of the documents in an index, click on the **Documents** tab in the search index viewer.

You can test out searching the index by using the search field at the top of the document listing.

If you click on a document a dialog will appear, displaying information about the data stored for the particular document.

Figure 9.2. Viewing the details stored with a search index document



Deleting an Index

You can delete an index either by clicking the **Delete** link beside a search index, or you can click the **Delete Index** button when viewing the search index.

You will then be prompted to confirm that you want to delete the index. Click **Yes, delete the index** to delete the index.

Adding Search to Your Site

In order to add search to your web site you must perform the following tasks:

1. Create one or more search indexes (and ensure they have been built).
2. Create a search template.
3. Add the search container rule to your site.

To create a search index, follow the instructions found earlier in this chapter.

Create a Search Template

To create a search template, refer to the instructions in the Managing Templates chapter. The type of template you must create is **Site Search** under the **Container Rule** heading.

Adding the Search Container Rule

Once you've created the template, you can add the search container rule to your site. For information on managing container rules, refer to the Administration Mode chapter.

The name of the container rule to add is **Site Search**. Select the search indexes you would like to include.

Once the container rule has been added you can search for documents.

Viewing Search History

Every time a search is performed on your web site it is recorded in a log so you can view what people are searching for. This is useful so you can see which search terms are popular.

To view the search history, use the **Search History** viewer.

A useful feature of this widget is that you can choose to only show searches that yield no results. This can be useful in identifying data that people expect to find on your site but do not find.

Search Language

The simplest way to perform a search is just to enter one or two keywords to search for, however, it is possible to perform far more advanced searches.

This section covers some of the ways searches can be performed. You may choose to include some of this detail on your web site to help you users perform advanced searches.

Query Terms

Words that appear by themselves in a search are called single terms, while multiple words that appear together surrounded by quotes are called a phrase. You can have any combination of these term types.

For example, the search term `Recite CMS` will search for documents that have both `Recite` and `CMS` in them, but the words don't have to appear together.

On the other hand, if you search for `"Recite CMS"`, only documents that have the two words together as that phrase will be found.

Fields

Earlier in the chapter I covered viewing the details of a single document in a search index (by clicking on it in the document listing). Each row in the dialog that appears indicates a different field stored for the document.

You can search within a specific field by prefixing the search term with the field name. For example, if a field called `title` is indexed, you can search for the term `people` in this field by using the search term `title:people`.

If you want to search for multiple words in a field you must quote the words. For example, `title:"hello goodbye"`.

Wildcards

You can include wildcards in your search using the `?` and `*` characters. The `?` will is a wildcard for a single character, while `*` is for one or more characters.

For example, `te?t` will match `test`, `tent` or `text`, but not `tempt`.

On the other hand, if you search for `te*t`, then `tempt` would be found.

Range Searches

You can search between an upper and lower bound by using a *range search*.

For example, if you searched for `fruit:{Apple TO Orange}`, the `fruit` would be searched for everything that lies between apple and orange (when sorted alphabetically).

In this example, if apple or orange were found they would not be included because curly braces were used. To make apple and orange match in the search, you would use square brackets. That is, `fruit:[Apple TO Orange]`.

Fuzzy Searches

You can perform *fuzzy* searches by using the `~` character at the end of a single term. For example, searching for `foam~` would match terms like `foam` or `roams`.

Proximity Searches

You can perform a *proximity search* by using the `~` character at the end of phrases. In a previous example I said that `"Recite CMS"` would find documents that have that exact phrase. On the other hand, if you want those words only to be near each other, you can use a proximity search.

For example, if you search for `"Recite CMS"~5`, then the two words much appear within 5 words of each other.

Term Boosting

You can boost the relevance of a term within your search by using the `^` character followed by a number.

By default, all terms have a boost factor of 1. If you wanted to search for `Recite CMS`, but you want the term `Recite` to have greater importance, change the term to `Recite^2 CMS`.

Boolean Operators

You can separate terms using the `AND`, `OR` or `NOT` keywords. For example, you can search for `Recite AND CMS` (must have both terms), `Recite OR CMS` (must have at least one of the terms), or `Recite AND NOT CMS` (must have Recite but mustn't have CMS).

Chapter 10. Managing Users

Recite CMS makes it easy to manage your web site users through the *user directories*. You can create any number of separate user directories, each of which can have any number of users.

Directories can be used in several ways. For example, if your site has a "register for newsletter" feature, you can add anyone who completes this form to a user directory called `Newsletter Users`.

Additionally, your site might also have a "members-only" area, where people can register on your site then have access to an area not accessible to normal visitors.

You can store a different set of fields for each of these sets of users. For example, you might only need an email address from a newsletter user, but from a member you might also want their name, address and country.

This chapter tells you how to manage users and user directories, including how to add user registration, log in, log out, and update account details functionality.

Additionally, this chapter will tell you how to manage Control Panel users. These are the users that can log in to Recite CMS and make changes to your web site.

Getting Started

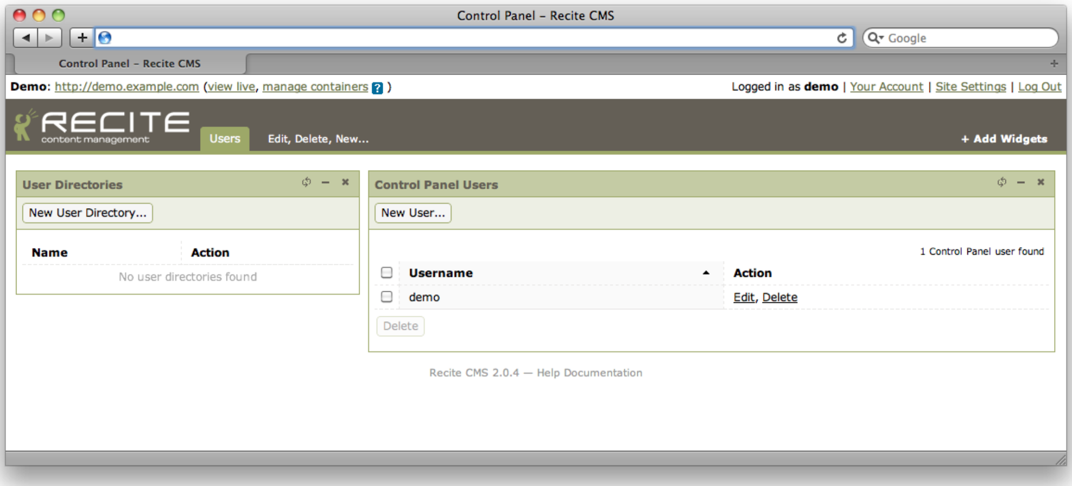
There are seven different Control Panel widgets available to help you manage users. These are as follows:

- **User Directories**. This widget lists all of your user directories. Clicking on a single user directory will load it in the **User Directory Viewer** widget.
- **User Directory Viewer**. This widget is for viewing the details of a single user directory. You cannot add this widget manually - it is automatically created when you click on a user directory in the **User Directories** widget.
- **User Viewer**. This widget is for viewing the details of a single user. You cannot add this widget manually - it is automatically created when you click on a user either in the **User Directory Viewer** widget or in the **Control Panel Users** widget.
- **Control Panel Users**. This widget is used to view Control Panel users. These are the users who can log in to the Control Panel and make changes to your web site.
- **Control Panel Roles**. This widget is used to manage the different Control Panel roles. A role is a category of user. You can control the level of access a user has by their role.
- **Control Panel Role Viewer**. This widget is used to view the details of a single role. You can manage the list of modules that users of this role have access to.
- **Control Panel Permissions**. This widget is used to manage specific permissions for the modules a user role has access to.

These widgets can be added manually (form the `User Management` category in the widget browser), or you can create a new tab using the **Users** pre-defined layout.

The following figure demonstrates this layout. The tab is a two-column layout, with the **User Directories** widget in the left column and the **Control Panel Users** widget in the right-hand column.

Figure 10.1. Sample tab layout for managing users



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Users** tab.

Managing User Directories

A user directory is a collection of users. You might have one user directory to hold registered members of your web site, and another to hold users that sign up to a newsletter.

You can decide whether or not users can then log in to your web site, and if so, which areas they get access to that other users don't.

Additionally, you can categorise users within each directory with user roles. This allows you to give one set of users access to one set of pages and a different set of users access to different pages.

Creating a User Directory

To create a new user directory, click the **New User Directory** button on the **User Directories** widget. You will then be shown the directory creation form.

You can choose to send newly-created users a welcome email. If you choose to do so you must first create the email to send them using the template management tools. The type of template to create is **User Registration - Email**.

Caution

You can attach the welcome email to the user registration form (refer to Managing Form Recipients for details about creating form emails), but doing so means if you manually create a new user they will not receive the welcome email.

You can define a custom list of fields to associate with users in the directory. For more details on managing custom lists, refer to Managing Custom Field Lists.

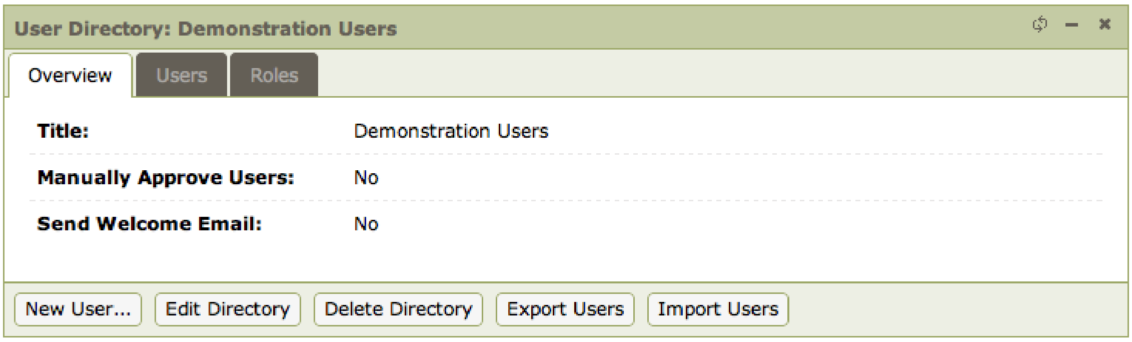
If you choose to manually approve users, then anybody that registers on your web site will have to wait for an administrator to activate their account before they can log in. They will only receive their welcome email once their account is approved.

Enter the details of the user directory then click **Create User Directory**. Your user directory will then be created and it will appear in the list of user directories.

Viewing a User Directory

To view the details of a user directory, click on it in the user directory list. It will then open in a new widget.

Figure 10.2. Viewing a user directory



The tabs across the top allow you to view users in the directory and the available user roles, while the buttons at the bottom allow you to edit or delete the directory, as well as bulk importing or exporting users.

Exporting Users

To export users from a directory, click the **Export Users** button at the bottom of the directory. You will then be prompted to select which users you want to export.

If the user directory you're exporting from has roles assigned to it, you can filter the export list by role. You can choose to export users that have no role, users that have any role, or users that have a specific role.

Click the **Download File** button and you will be prompted to save a comma-separated values (CSV) files. The dialog will remain open until you click the **Close** button.

Importing Users

You can import a large number of users at once to a single user directory by uploading a comma-separated values (CSV) file. Each line in the file corresponds to a single user.

Click on the **Import Users** button to begin. A dialog will appear with instructions on which fields to include in your CSV file.

Once you select the file to upload the import will begin. If any errors were encountered in your file you will be prompted to fix any errors.

Editing a User Directory

You can edit the settings for a user directory (such as the custom fields or email template) by clicking on the **Edit Directory** button when viewing the directory.

Make any changes as required then click the **Save User Directory Changes** button.

Managing User Roles

User directories also allow you to manage a series of user roles. This is a way of categorising users to allow differing levels of authorisation. A user can be assigned to any number of user roles.

To manage roles, click on the **Roles** tab when viewing a user directory. This will show a list of existing user roles.

Click on the **New Role** button to create a new role. A role can inherit from another role. If a role inherits from another role, it automatically receives all permissions of its parent role unless overridden explicitly.

Note

User roles in user directories are currently only used for page permissions. You can restrict pages in your web site to users based on their user directory and their user role.

If you delete a user role, users that belong to that role are not deleted.

Deleting a User Directory

To delete a user directory, either click the **Delete** link beside the directory in the directories list, or click the **Delete Directory** button when viewing a directory.

You will be prompted to confirm that you want to delete the user directory. Click **Yes, delete the directory** to confirm deletion.

Warning

Deleting a user directory will also delete all users within that directory. This operation cannot be undone.

Managing Users

Once a user directory has been created you can add users to the directory. Alternatively, you can add a **User Registration** form to your web site so users can sign up and be added to a user directory (this is covered later in this chapter).

Creating a New User

To manually create a new user, click the **New User** button when viewing a user directory.

You will then be shown the user creation form. Enter the details of the user, including their username and password. Click **Create User** to create the user. They will then appear in the user listing for their corresponding directory.

If your user directory is set to email newly-created users, the new user will now be sent the welcome email.

Note

The user directory must have an email field for this to occur.

Viewing a User

Once a user has been created, click on the user in the user listing to open it in the **User Details** widget.

The user details widget shows you a summary of the user, with options for editing and deleting the user. Additionally, you can view a list of all emails ever sent to the user by clicking on the **Emails** tab at the top of the widget.

Editing a User

To edit a user, click the **Edit User** button when viewing the user. You will then be shown the user editing form. Update any details as required and click **Save User Changes**.

Deleting a User

To delete a user, click the **Delete User** button. You will be prompted to confirm deletion. Click the **Yes, delete the user** button to confirm.

Adding User Management to Your Web Site

Once you have created a user directory, you can set up a protected area on your web site. You could manually create all users you want to access this area, or you can allow users to register themselves. This section tells you how to set up a protected area, as well as how to let users register and log in.

Adding a Protected Area

To create a protected area you must first create the page you want protected. Refer to the Managing Pages chapter for how to create a new page.

You must also create the page you want users to be redirected to if they try to access the protected area without authenticating. We will refer to this as the log in page. We will add a log in form to this page later in this guide.

Note

This page must not be within the restricted area unless you set the permissions for this page to "allow access".

Next you must update the permissions for the protected area page. Click on the **Permissions** button when viewing the page. Select the **Restrict to directory** option, then select the log in page.

Click **Save Permissions** to save the permissions settings. If you now try to access the protected page from your web site you will instead be shown the log in page.

Adding User Registration

To add user registration to your site you must first create a **User Registration** form. For more details on creating forms refer to the Managing Forms chapter.

Select the user directory you want newly-registered users to belong to. This must be the same user directory as you set the page permissions to in the previous step.

Once this form has been created you must create a new template with which to display this template. The type of template to create is **User Registration**. The easiest way to create this template is to use the sample template that is available.

Finally you must add the **Web Form** container rule to the registration page. Open the page in container management mode then add the container rule. Select the user registration form and the template you just created when adding this rule.

Now if you reload the registration page you will see the registration form. You can now fill out this form and a new user will be created in the user directory.

Adding a Log In Form

In order to access a protected on your site, users need a way to authenticate. This is done using the **User Log In** form. We will be adding this form to the log in page created earlier in this guide.

When creating the form, select the user directory that the protected area is restricted to. The landing page is the page users are redirected to after they authenticate. Select the protected page for this page.

Once you have created the form you must then create a template for displaying the form. When creating the template, use the template type **User Log In**. The sample template provided is adequate for this guide.

Finally, load the log in page in container management mode. Now add the **Web Form** container rule, selecting the newly-created form and template. After the rule is added, reload the page and you will now see the log in form.

Now if you try logging in with the details you used for registration, you will be taken to the protected area.

Adding a Log Out Link

After a user has logged-in, you can give them the option to log out by providing a link to `/__/users/logout`.

The following code shows an example of doing so.

Example 10.1. Adding a log out link

```
{if $authenticated}
    <a href="/__/users/logout">Log out</a>
{/if}
```

Keeping Users Logged In

By default, a user will be remain logged-in until they close their browser or click a log out link. You can change this behaviour so users remain logged-in when they revisit the site (even if they closed their browser).

To achieve this, add a value to the log in form called `remember` with a value of `1`. The sample template includes an option for the user to choose this setting.

Adding a Password Reset Form

Users will often forget their password. Because of this, it is good practice to allow users to reset their password.

> **Note**
>
> For security reasons, Recite CMS does not store users' password. This means users will have to create a new password if they forget their old password.

To allow users to reset their password you must create a password reset form. This form sends an email to the user with instructions on how to reset their password.

Before you can do this you must create the email template that is sent to users. Create a template with the type **User Reset Password - Email**. The sample template that is available includes the instructions for the user.

Next, create a form with the type **User Reset Password**. Select the appropriate user directory and your newly-created email template.

Finally, you must add the **User Password Reset** container rule to a page on your site. This page must not be in the protected area, since only users that are not logged-in will be using the password reset tool.

Allowing Users to Update Their Account

You can allow users to update their account details (including their password) using the **User Details** form type.

After creating the form, create a new template to display the form. The template type is **User Details**. There is a sample template you can use as a basis.

Finally, add the form to a page within the protected area. This form should not be made available to users unless they are logged-in.

Displaying User Identity Data

Once a user has logged-in, you can access their identity details (such as their username and any custom fields that belong to their user directory). These values are available in an array called `$identity`.

You can determine whether or not a user is currently logged-in by checking the `$authenticated` variable.

Example 10.2. Accessing the user's identity data

```
{if $authenticated}
    Logged in as {$identity.username|escape}.
    Email is {$identity.fields.email.preview|escape}.
{else}
    Not logged in.
{/if}
```

Note

Custom fields are stored in the `fields` entry in `$identity`. In this example, there is a custom field called `email`.

Identity data is available from all page and container rule templates.

Managing Control Panel Users

A Control Panel user is a user that can log in to the Control Panel and make changes to your web site. When a user is created you must select their role. A user role defines the level of authorisation for that user. That is, it controls what they can and cannot do.

Control Panel users are managed in a similar way to users in user directories. The main differences are that you cannot customize the list of fields for Control Panel users, and users can only have one role assigned to them.

Creating a New User

To create a new user, click the **New User** button from the **Control Panel Users** widget. You will then be shown a dialog with the user creation form.

Select the user's role and enter their other details. Once you have completed this form click **Create User**. The new user will appear in the list of Control Panel users.

To view the new user, click their entry in the list of Control Panel users. The user details widget will now open.

Editing a User

To edit a user, either click the **Edit** link beside their name in the list of Control Panel users, or click **Edit User** when viewing the user.

You will then be shown the user edit form. Update any details as required then click **Save User Changes**.

Deleting a User

To delete a Control Panel user, either click the **Delete** button beside the user in the user listing, or click the **Delete User** button when viewing the user.

You will be prompted to confirm deletion of the user account. Click **Yes, delete the user** to delete the user. This action cannot be undone.

Disabling a User Account

If you want to temporarily disable access to an account (meaning that user will be unable to log in to the Control Panel), you can update its status. To do so, follow the instructions for editing a user, and select the appropriate user status.

Managing Control Panel Roles

User roles are used to define the level of authorisation for a logged-in user. Every Control Panel user belongs to a single role. You can control permissions (see the next section) for each role. This in effect determines which tasks each Control Panel user can perform.

By default there are a number of different user roles defined, but you can change these as you see fit. Additionally, you can elect for a role to inherit from another role. An inherited role will have all of the same permissions as the role it inherits from. You can then override any individual permissions as required.

Roles are managed in the Control Panel using the **Control Panel Roles** widget.

Creating a Role

To create a role, click the **New Role** button when viewing the list of Control Panel roles. You will be shown the role creation form. Enter a name for the new role, and if you want in to inherit from another role, select the role to inherit from.

Click **Create User Role** to save your new role. The list of Control Panel roles will now update.

Viewing a Role

To vie the details for a role, click on it when viewing the list of Control Panel roles. The **Control Panel Role Viewer** widget will now open. This widget shows a list of modules that are available.

Each module has a checkbox beside, which indicates whether or not users of the role you are viewing have access to that module. Click on a module to assign it to or unassign it from a role.

If a role is not assigned, then those users cannot perform any functions related to that module. For example, without access to the pages module, users cannot add page management widgets. This also means they cannot create or update pages.

If you want to have finer-grained control over what a user can and cannot do (for example, you want to allow them to create new pages but not delete existing pages), refer to the next section about permission management.

Editing a Role

To edit a role, either click the **Edit** link beside the role in the role listing, or click the **Edit Role** button when viewing a role.

You can now rename the role, as well as changing its parent role.

Note

If you change the parent role you may dramatically impact the permissions of the current role.

Click **Save Role Changes** to save your changes.

Deleting a Role

If you want to delete a role, you cannot do so until all users belonging to that role are changed to a new role.

Once you have done so, click the **Delete Role** button when viewing the role. You will be prompted to confirm deletion of the role. Click **Yes, delete the role** to delete the role.

Any roles that inherit from the role you are deleting will not be deleted. Instead, they will be "promoted". That is, they will now inherit from the parent of the role being deleted.

Managing Control Panel Permissions

The **Control Panel Permissions** widget allows you to control user permissions to a greater degree than when viewing a Control Panel role. For example, you can keep the pages module (which includes all page management widgets) assigned to the role, but take away privileges such as page deletion.

To manage permissions, open the widget then select the module to manage. You can only update the permissions of a single module at a time.

The permissions available for a module are listed on the left, while the roles are listed along the top. To represent the inheritance of roles a number is displayed beside each role. The following screenshot demonstrates this. In this example, `Administrator` has no roles inheriting from it, while `Editor` inherits from `Author` and **Reviewer** inherits from **Editor**.

Figure 10.3. Managing permissions

The very first permission in the list controls whether or not the role has access to the module. Its name is `module:`*`moduleName`*. Changing this permission is the same as selecting or de-selecting the module when viewing the role.

Every permission has a default setting, as well as a setting for each role. The role setting can be set to "inherit" (indicated by a blue funnel), "allow" (indicated by a green tick), "deny" (indicated by a red cross).

If the permission is set to inherit, whether or not a role has access to the permission is determined by the parent role. If the parent role is also inherited, then the grandparent is looked at (and so on).

If the role does not have a parent role, the default permission is used (this is the reason the default setting does not have an inherit option).

To change a permission setting, click on the relevant icon. The permission will be saved immediately.

Chapter 11. Managing Calendars and Events

Recite CMS allows you to manage calendars and events that can be published on your web site. This is useful for many different purposes, such as creating news articles or blog posts.

You can have any number of calendars in your web site, and any number of event types. Each event type can have a custom list of fields associated with it, making it an extremely flexible system.

Getting Started

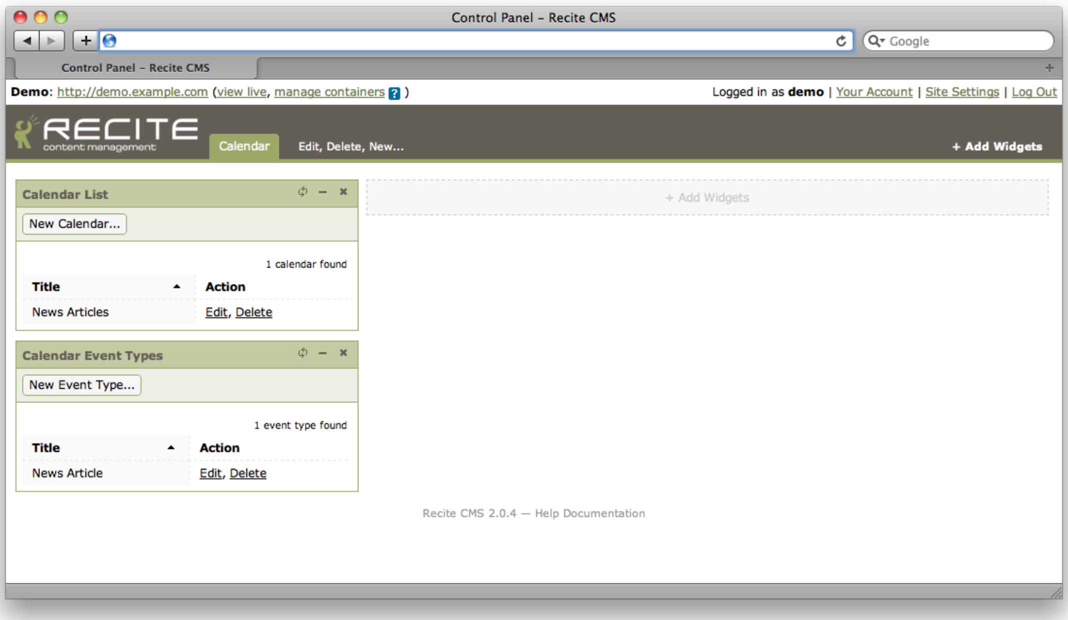
There are four different Control Panel widgets available to help you manage calendars and events. These are as follows:

- **Calendar List**. This widget lists all calendars that exist on your web site.
- **Calendar Viewer**. This widget is used to view and manage a single calendar. This widget can be opened by clicking on a calendar in the **Calendar List** widget.
- **Calendar Event Viewer**. This widget is used to view and manage a single calendar event. This widget can be opened by clicking on an event in the **Calendar Viewer** widget.
- **Calendar Event Types**. This widget is for managing the different types of calendar events. Every event that is created corresponds to a single event type. When creating a calendar you can decide which event types can be used within the calendar.

You can add the calendar list and event types widgets manually (from the `Calendar Event Management` category in the widget browser), or you can create a new tab using the **Calendar** pre-defined layout.

The following figure demonstrates this layout. The tab is a two-column layout, with the **Calendar List** and **Calendar Event Types** widgets in the left column and a placeholder for viewing calendars and events in the right column.

Figure 11.1. Sample tab layout for managing calendars and events



For the purposes of this chapter, I'll assume you're working with a tab having the same layout as the pre-built **Calendar** tab.

Managing Event Types

Every event that is created must be of a particular type. You can create any number of event types, each of which can have a different set of custom fields. This is useful, because you might want to store one set of fields for press relases and another set of fields for blog posts.

By default, Recite CMS will create an event type called `News Article`. It's up to you whether or not you want to use it - you can edit or delete it if required.

Creating an Event Type

To create a new event type, click the **New Event Type** button when viewing the list of event types.

You will now be shown the event type creation form. Enter a title for the event type and create a list of fields (refer to Managing Custom Field Lists for more details on managing custom field lists).

Once you have completed this form, click the **Create Event Type** button. The new type will now appear in the list of event types.

Editing an Event Type

To edit an existing event type, click the **Edit** link beside the event type.

Make any changes as required, then click the **Save Event Type Changes**.

Deleting an Event Type

To delete an event type, click the **Delete** link beside the event type you want to delete.

You must confirm this action before the event type is deleted. Click **Yes, delete the event type** to delete the event type.

Note

You cannot delete an event type if there are still events using the type. You must first delete those events.

Managing Calendars

In Recite CMS, a calendar is a collection of events. You can use calendars to split up events. For example, you might have one calendar for holding news articles, and another calendar for holding upcoming seminars.

You can choose which types of events can be created in a calendar. You can allow any event type to be created, or you can narrow it down to only one or two types if you want to.

By default, Recite CMS creates a calendar called News Articles. You can choose to keep this calendar or you can edit or delete it.

Creating a Calendar

To create a new calendar, click the **New Calendar** button on the calendar listing widget. You will then be shown the calendar creation form.

On this form you can enter a title, select the calendar owner and select event types that can be used in the calendar. The owner dropdown shows all Control Panel users.

The other option in this form is whether or not to accept events from other calendars. If you select this option then the calendar is considered to be a *global calendar*. If the calendar is global calendar you can assign events from other calendars to this calendar. When you output events from this calendar on your web site any events assigned from other calendars are also included.

Click the **Create Calendar** button to create your calendar. The calendar listing will now update to show the new calendar. Clicking on the new calendar will open it up in the **Calendar Viewer** widget.

Viewing a Calendar

When you click on a calendar in the **Calendar List** widget it will open up in the **Calendar Viewer** widget.

This widget shows a list of events that belong to the calendar. You can sort and filter these events as required.

In addition to buttons for editing and deleting the calendar, there are options to bulk import and export events.

Exporting Events

To export events from a calendar, click the **Export Events** button (disabled if there are no events). You can only export events of one type at a time.

You will now be prompted to select which fields you want to include in the export. Click the **Download File** button and you will be prompted to save a comma-separated values (CSV) files. The dialog will remain open until you click the **Close** button.

Importing Events

You can import a large number of events at once to a calendar by uploading a comma-separated values (CSV) file. Each line in the file corresponds to a single event.

Click on the **Import Events** button to begin. A dialog will appear with instructions on which fields to include in your CSV file.

The importer can detect duplicates based on the field you select. You can then decide how you want the importer to handle duplicates.

Once you select the file to upload the import will begin. If any errors were encountered in your file you will be prompted to fix any errors.

Editing a Calendar

To edit a calendar, click the **Edit Calendar** button at the bottom of the calendar viewer widget.

If you change the list of allowed event types any existing events will remain in the calendar regardless of their type.

Once you have updated any required options, click the **Save Calendar Changes** button.

Deleting a Calendar

To delete a calendar, click the **Delete Calendar** button when viewing the calendar. You will be prompted to confirm deletion.

Note

When you delete a calendar, all events that belong to the calendar are also deleted. This operation cannot be undone.

Click **Yes, delete the calendar** to confirm the calendar deletion.

Managing Calendar Events

In Recite CMS, all calendar events belong to a single calendar. A calendar can have any number of events.

Creating an Event

When viewing a calendar, click the **New Event** button to create an event. If there are multiple event types available you will need to choose which event type to use. You will then be shown the event creation form.

Calendar events are all *date-based*. As such, you must select the start and finish date and time for events. If the time is not relevant to your event (that is, you only want to store the date), check the **All Day** checkbox. This will hide the time input boxes.

Tip

If your event does not have a finish date/time (such as a press release), select the end date to be the same as the start.

Once you have completed this form click the create button. The newly-created event will now appear in the list of events in the calendar viewer.

Clicking on the newly-created event will open it in the **Calendar Event Viewer** widget.

Viewing an Event

When you click an event in the event listing in the calendar viewer, it will open up in the **Calendar Event Viewer** widget. This will show you a summary of the event, including data stored with the event and its current status.

Editing an Event

To edit an event, click the **Edit Event** button when viewing the event. You will then be shown the event edit form. Update any details as required then click the save button.

Deleting an Event

You can delete an event by clicking the **Delete Event** button when viewing an event. You will prompted to confirm this action. Click **Yes, delete the event** to proceed.

Adding Events to Your Web Site

There are several container rules you can use for publishing events on your web site, as well a page type driver you can use for displaying a single event.

The main container rules are **Calendar Event Calendar** and **Calendar Event Listing**. There is also the **Calendar Event Cart** rule, but this is covered in the next section.

The **Calendar Event Calendar Display** rule makes data available to easily output a calendar-style display on your site. If you elect to just show a single month at a time, then only events from that month are available to list.

The **Calendar Event Listing** rule is to display a list of events. You can split up this list into multiple pages.

To view an event in the context of a whole page, create a new page type using the **Calendar Event Details** driver. You can then create a new page in your site using the newly-created page type.

To link to an event, use the `url` field in the event template data. For instance, if your event details page is located at `/event/view`, when you loop over events you can link to `/event/view/{$event.url}`.

Personal Calendars

It is possible for users of your web site to keep a list of events you have published that they are interested in. This works similarly to a shopping cart in that they can add or remove events to their own personal list of events. This is available to both logged-in users and anonymous users.

Note

The difference between the "event cart" and a real shopping cart is that you can't buy events, and the event cart doesn't have the concept of quantities.

For this to work you need to give your user the option to add an event to their cart. You can do this when outputting a list of events (with the **Calendar: Event Index** container rule) or when displaying a single event's details (with the **Calendar: Event Details** container rule).

You can then add the **Calendar Event Cart** container rule so a user can view and manage their events.

Event Clashes

In the event a user adds events that clashes with each other, you can give the user the option to choose their preference for clashing events. This is covered below.

Event Management Actions

You can add or remove events using either normal forms or Ajax requests. If you use Ajax, JSON data is returned that you can use as required. This is covered shortly.

Adding Events: cartadd

To add an event, submit your form to `$forms.cartadd.action` with a form method of `$forms.cartadd.method`. This form requires a parameter called event which contains the URL value (such as `$event.url`) of the event.

If not using Ajax, you can specify the return parameter which contains the URL of the page to load after the event has been added. If this omitted the user is returned to page they were on when they added the event.

Here is a sample template:

```
<form method="{$forms.cartadd.method}" action="{$forms.cartbulk.action}">
    <div>
        <input type="hidden" name="event" value="{$content.url|escape}" />
        <input type="submit" value="Add" />
    </div>
</form>
```

Additionally, the event data contains a parameter called in_cart which is true if the event is already in the user's cart, and false if not. You can use this determine whether to show add button or a remove button (removing is covered shortly).

```
{if $content.in_cart}
    {* show remove form or no form *}
{else}
    {* show add form *}
{/if}
```

Removing Events: cartremove

Similar to adding events, you can also remove them. The only difference is that you use the `$forms.cartremove.action` and `$forms.cartremove.method` values instead.

You can use the `in_cart` variable once again to determine if the event is already in the cart, although if you're using the event cart rule you can assume that all events are already in the cart.

A sample template is as follows:

```
<form method="{$forms.cartremove.method}" action="{$forms.cartremove.action}">
    <div>
        <input type="hidden" name="event" value="{$content.url|escape}" />
        <input type="submit" value="Remove" />
    </div>
</form>
```

Empting Event Cart: cartempty

To remove all events in a user's cart, submit to the `$forms.cartempty.action` URL.

```
<form method="{$forms.cartempty.method}" action="{$forms.cartempty.action}">
    <div>
        <input type="submit" value="Remove All" />
    </div>
</form>
```

Resolving Clashes: cartclash

When using the event cart and displaying a list of all events for a user, you can also determine any clashes using the clashes array. Each element in this array has a key and value: The key is the ID field of the event it clashes with, while the value is the URL field of the preferred event.

To resolve a clash you must submit to `$forms.cartclash.action`. There are three required parameters: `event1`, `event2` and `preferred`. The first two parameters (`event1` and `event2`) correspond to the ID field of the two events the clash is being resolved for, while the preferred field should contain `0` for no preference, the value of `event1` if the first event is preferred, or the value of `event2` if the second event is preferred.

A sample template is provided with Recite for outputting clash data and resolve form.

Bulk Managing Events: cartbulk

You can bulk add or remove events using the `$forms.cartbulk.action` URL. This action can accept an array called `add[]` which contains the URL field of events to add, an array called `remove[]` which contains the URL field of events to remove, and a parameter called empty, which if present will empty the cart.

Events are removed prior to being added, so if the same URL is present in the remove and the add arrays then ultimately the event will be added.

There is a sample template provided with Recite which demonstrates this functionality.

Form Response Data

When you submit any of the described actions, you can access a summary of what has occurred in the event cart container rule. This is available with the `$status` array, which contains the following keys:

- `added` – List of events that were added
- `updated` – List of events that were updated (specifically, events that has clashes resolved)
- `removed` – List of events that were removed
- `emptied` – True if the event cart was just emptied

There is a sample of this in the `cart-summary.tpl` template in Recite.

Ajax Response Data

If you submit any of the cart actions using Ajax, the following data is returned as a JSON array. Note that any of these may be omitted.

- `added` – An array of events that were added. Each element is an object with an `id` and `title` property corresponding to the event that was added.
- `removed` – An array of events that were removed. Each element is an object with an `id` and `title` property corresponding to the event that was removed.
- `emptied` – This is a boolean set to to `true` if the cart was emptied.
- `error` – This is a boolean set to `true` if an error occurred.
- `errormsg` – If an error occurred then this contains a description of the error that occurred.

Chapter 12. Managing Feeds

Recite CMS allows you to easily add feeds to your web site. Feeds can be published in number of formats, including RSS, Atom and Google Sitemaps.

You can create as many feeds as you like, and there is a variety of sources for feed data. For example, you can create an RSS feed of latest events, or you can create Google Sitemap containing every page in your site.

Getting Started

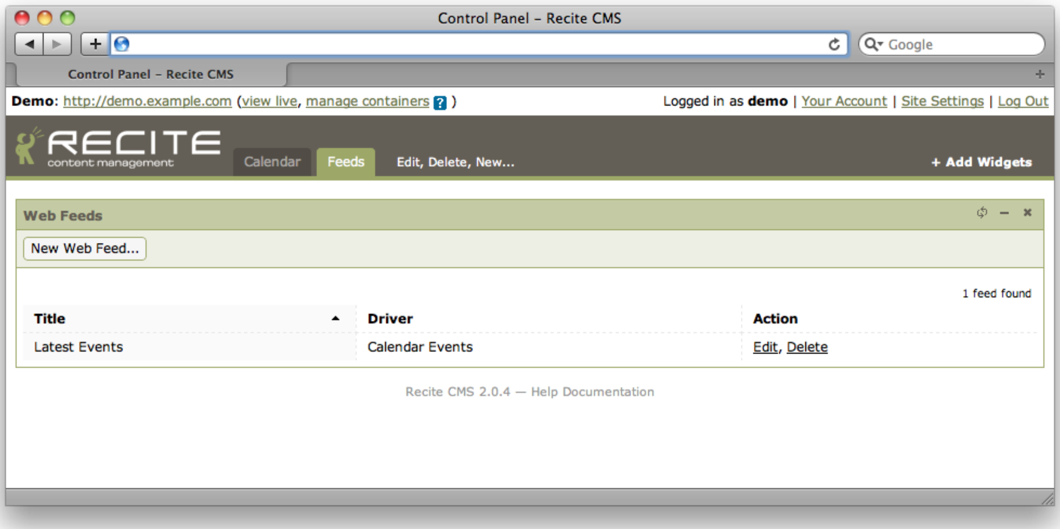
There is one Control Panel widget available to help you manage feeds:

- **Feeds Listing**. This widget shows all feeds in your site and allows you to create and manage feeds.

You can either add the feeds listing widget manually (it can be found in the `Web Feeds` category in the widget browser), or you can create a new tab using the **Feeds** pre-defined layout.

The following figure demonstrates this layout.

Figure 12.1. Sample tab layout for managing feeds



Managing Feeds

Feeds are managed using the **Feeds Listing** widget. When managing feeds, we are only concerned with the source data. That is, the data that makes up the feed.

The presentation of the feed (that is, whether we output the feed data as RSS or Google Sitemaps) using the page management tools. This is covered later this chapter.

Creating a Feed

To create a feed, click the **New Web Feed** button. You first need to select the type of data you want to create the feed from. Once you have chosen this you will be shown the feed creation form.

Once you have filled out this form, click the **Create Web Feed** button. The feed will now be created and appear in the feed listing widget.

Editing a Feed

To edit the options for a feed, click the **Edit** link beside the feed you want to make changes to. You will then be able to change options as required. Click the **Save Web Feed Changes** to save your changes.

Deleting a Feed

To delete a feed, click the **Delete** link beside the feed you want to delete. You will be prompted to confirm deletion. Click **Yes, delete the web feed** to delete the feed.

Caution

If you delete a feed that is published on your web site, any page used to output the feed will now return "404 Not Found" error.

Adding an RSS Feed

To add an RSS feed to your web site you must first create a new page type. You may find the Managing Pages chapter useful.

Create a new page type using the **Web Feed** driver. At this stage you need only select the output type - we select the feed when creating the page that uses the new page type.

Select `RSS` from **Output Driver** dropdown and save the type.

Next, create a new page in your web site using your newly-created page type. Complete each of the options, including selecting the feed you want to publish as RSS.

Now if you visit the new page in your web site you will be shown an RSS feed rather than a traditional HTML page.

Adding a Google Sitemap

To create a Google Sitemap, the process is almost identical to creating an RSS feed. Instead of selecting **RSS** as the output type when creating the page type, select **Google Sitemaps** instead.

Additionally, when creating the page, use a URL value of `sitemap.xml`. Although not mandatory, this is a convention when creating site maps for Google.

Additionally, you should create this page at the top level of your site (that is, directly beneath the home page of your site). Google only allows pages within the branch of your site where the site map is located.

Once you have created your site map you can add it to Google. This is achieved using Google Webmaster Tools [http://www.google.com/webmasters/tools].

Note

If you haven't done so already, you will need to set up your site in Google Webmaster Tools before you can add a site map. This may require validating your site to prove that you have access to manage it.

Chapter 13. Administration Mode

Administration Mode (also known as *Container Management Mode*) is a way of making changes to your web site while interacting directly with the web site, rather than with the Control Panel.

Each page on your web site can have any number of *containers*. This is a pre-defined area on your page that can hold extra dynamic content. This content is made up of *container rules*. Each container can have any number of container rules.

Administration mode also allows you to edit page content using the What You See Is What You Get (WYSWIYG) editor in real-time while viewing that page. This is covered later this chapter - first we'll look at how containers work.

You can open your web site in Administration Mode by clicking **manage containers** in the top-left of the Control Panel.

Administration Mode Toolbar

When you are in Administration Mode you will see the administration mode toolbar. Currently this is used for toggling between live and draft versions of content. It also provides options for toggling container view and for closing administration mode.

Figure 13.1. The administration mode toolbar

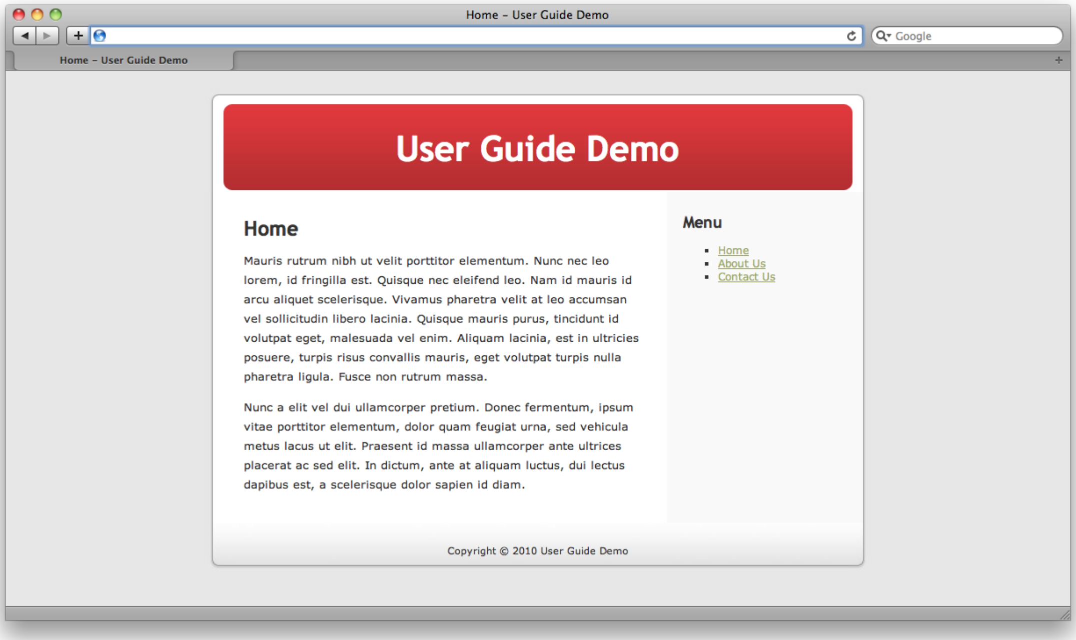
You can change the location of the toolbar on your page by clicking and dragging it. The position of the toolbar will be remembered for subsequent page views.

Managing Container Rules

The best to demonstrate containers is with an example. Thissection shows you how to add a container rule for displaying site navigation.

To demonstrate how container rules are used, this section describes to process of adding a basic navigation system to your web site. This example uses the default web site layout that comes with Recite CMS. In the following figure you can see the navigation in the right-hand column.

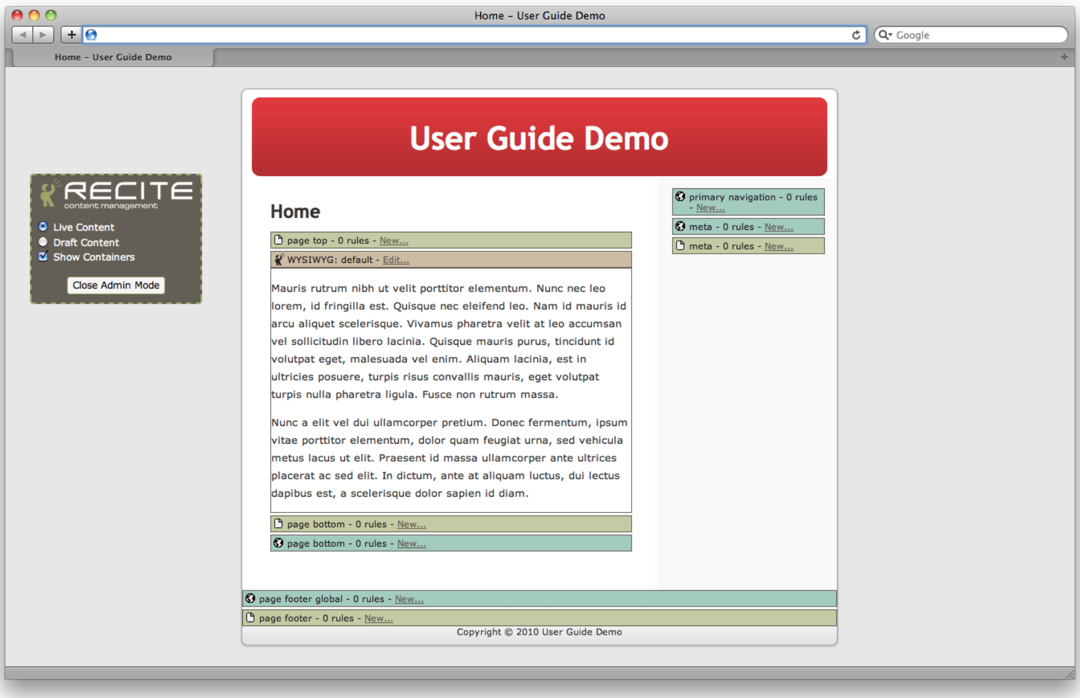
Figure 13.2. The end result of adding navigation via container rules



Opening Your Site in Administration Mode

You can open your site in Administration Mode from the Recite CMS Control Panel by clicking **manage containers** in the top-left. The following figure shows the example site in container mode (navigation has not yet been added).

Figure 13.3. Viewing the site in administration mode



Container Types

There are many different containers on this page (as well as a WYSIWYG editing area). The only one we will be using is entitled `primary navigation`.

Note

You don't have to make use of every container - typically one page may use a container in one area on your page while a different page may make use of another.

There are two kinds of containers: global and local. A global container has a green background and is indicated by an icon of Earth. A local container has a mustard background and is indicated by an icon of a page.

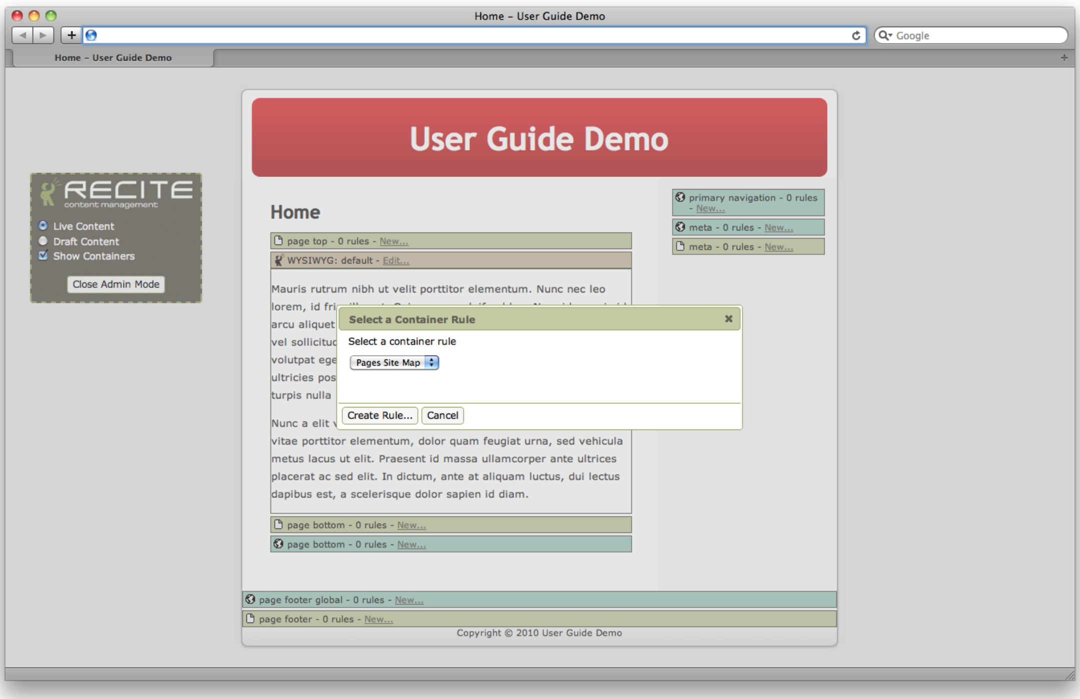
The rules you add to a global container are shared by every page that has that container. In this example we will be adding navigation to the global `primary navigation` container. This means we need only add the rule once and it will appear on every page that includes this container.

Conversely, rules added to a local container appear only on the page on which you add the rule. For example, if we added a container rule to the `page top` rule in the above figure, that rule would only appear on the one page. It would not appear on other pages that also have a local container called `page top` unless you manually added the rule on each of those pages also.

Adding a Rule

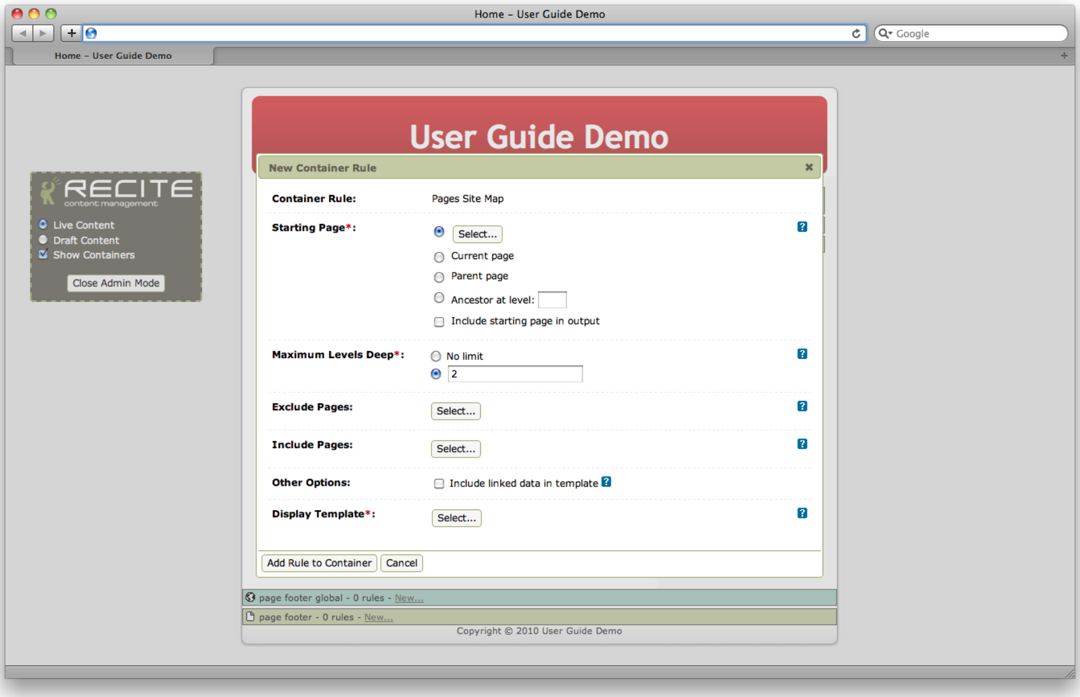
You can add a rule to a container by clicking on the **New** link within the container. After clicking this link you will be prompted to select the type of rule to add. We will be adding the **Pages Site Map** rule.

Figure 13.4. Selecting the rule to add to a container



Once you have selected the rule click **Create Rule**. You will then be shown a form with options for the rule. For the site map rule there are many configurable options.

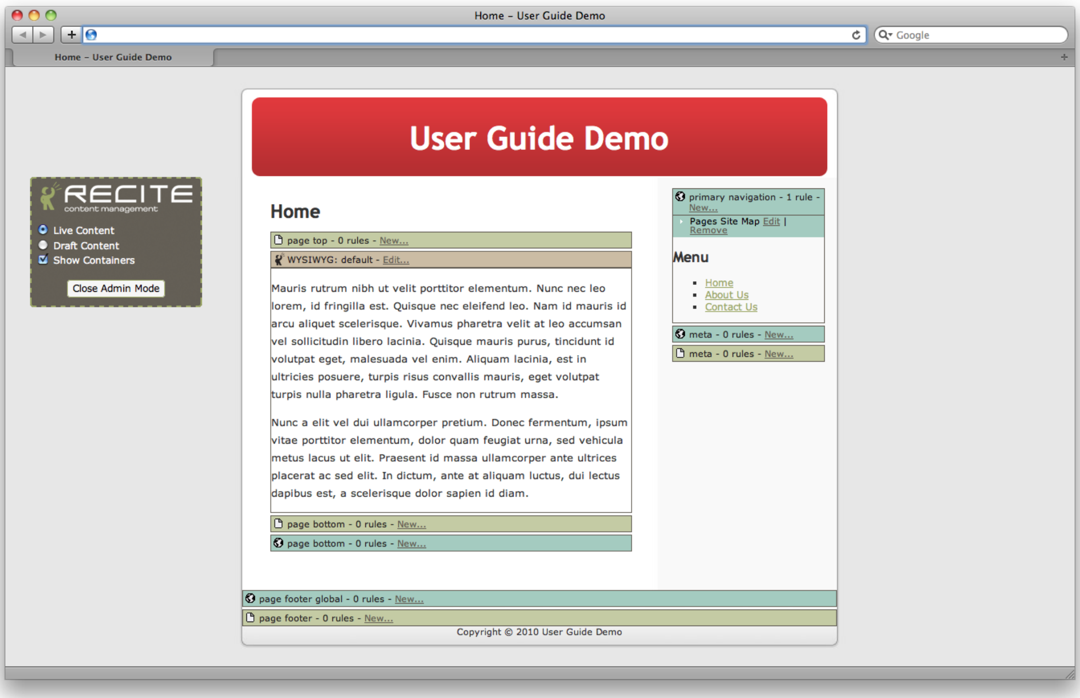
Figure 13.5. Selecting the rule to add to a container



Since we are using the rule to display web site navigation, we will start the site map from the home page. Additionally, we must select a template to output the navigation. This is a template we must create ahead of time via the Control Panel. The template type is **Pages Site Map**. Click **Add Rule to Container** to create the rule.

Once the rule has been added the container will update to indicate the rule has been added. You must reload the page to see the output from the container rule.

Figure 13.6. Administration mode with the newly-created container rule



Each rule within a container has its own options panel. This allows you to edit or delete rules.

You can close administration mode to view your site as everybody else sees it - with a navigation system!

Moving and Re-Ordering Rules

If you want to change the order of rules within a container, or if you want to move a rule to a different container you can click and drag the rule's option panel. Drag it to the desired location and it will immediately be saved.

Caution

Be careful dragging rules from a local container to a global container (or vice-versa). Changing global containers can impact your whole site - not just one page.

Defining Container Locations

The location of containers on your page are defined by the page display template. Refer to the Managing Templates chapter.

The `{container}` template plug-in is used to create containers. There are two arguments that can be passed to this plug-in: `name` (required) and `global` (optional).

For example, the template code used to add the global container for navigation was as follows.

Example 13.1. Adding a global container to a template

```
{container name='primary navigation' global=true}
```

If you want to create a local container, you can omit the `global` parameter (or set its value to `false`.

Example 13.2. Adding a local container to a template

```
{container name='page top'}
```

Updating Page Content

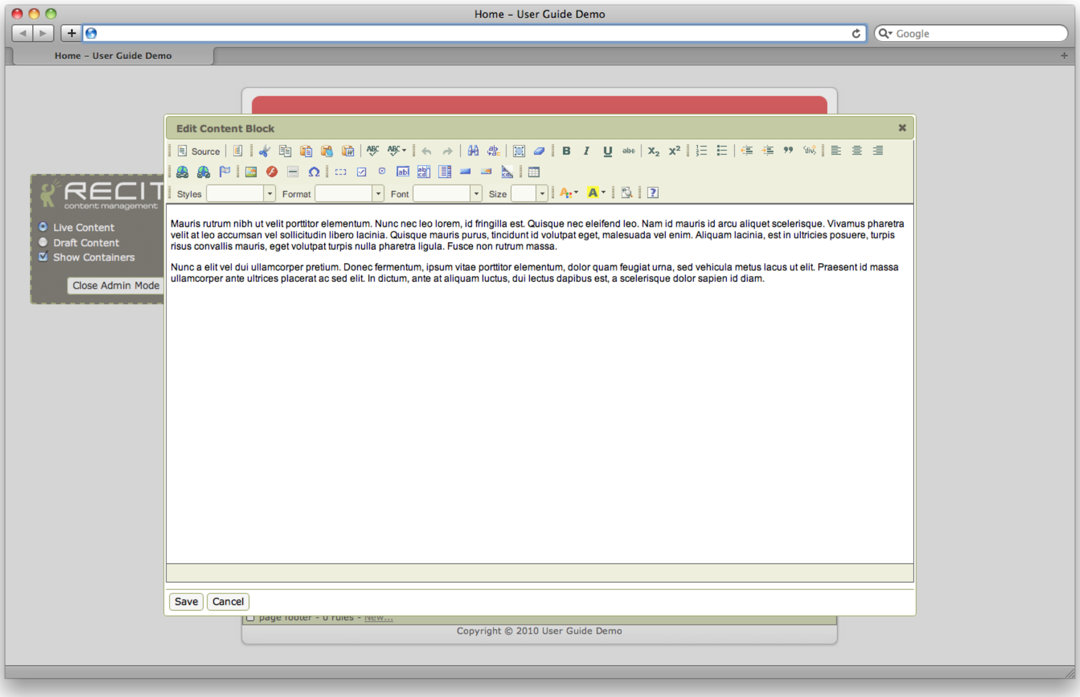
In addition to managing containers and container rules in Administration Mode, you can also update the body content of pages.

Note

Currently this functionality applies only to the content areas of pages. In the future this may be extended to include other content (such as calendar event data).

An editable area is indicated similarly to containers, except they use a brown background with an icon of the Recite CMS logo. Clicking **Edit** opens the WYSIWYG editor.

Figure 13.7. Editing content via the WYSIWYG in Administration Mode



Make any changes required then click **Save**. The content area will be updated to reflect any changes you have made.

For further details on using the Recite CMS WYSIWYG Editor, refer to WYSIWYG Editor Guide.

Defining Editable Areas

Similar to defining the location of containers on your pages, you must also define the location of content blocks on your pages. This is achieved when creating your page template by using the `{contentblock}` plug-in.

This plug-in takes a single argument called `name`. For example, to create a content block called `default`, the following code would be used in your page template.

Example 13.3. Adding a content block to a page

```
{contentblock name='default'}
```

This serves two purposes: displaying editable content areas when in Administration Mode, and allowing you to edit content via the **Content** tab when managing pages in the Control Panel.

Chapter 14. Miscellaneous Topics

This chapter contains topics that don't belong in other chapters.

Managing Custom Field Lists

Custom field lists are used in many situations when building your site in Recite CMS, such as:

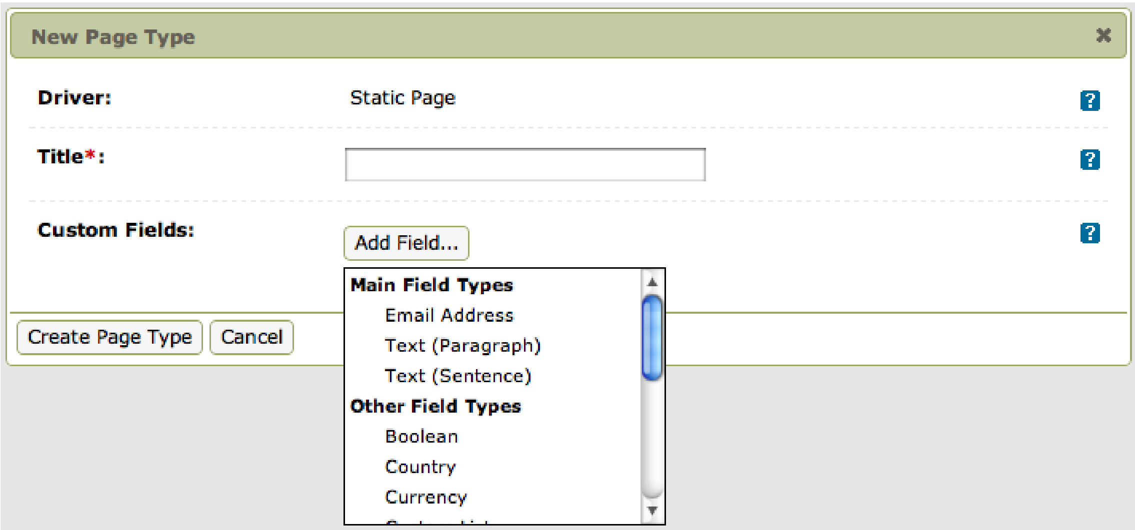
- Defining fields for a custom email form
- When creating a calendar event type
- When creating a new page type

When managing a field list, your changes are not saved in real-time. You must finalise the form on which the field list manager appears before your changes are saved.

Adding a Field

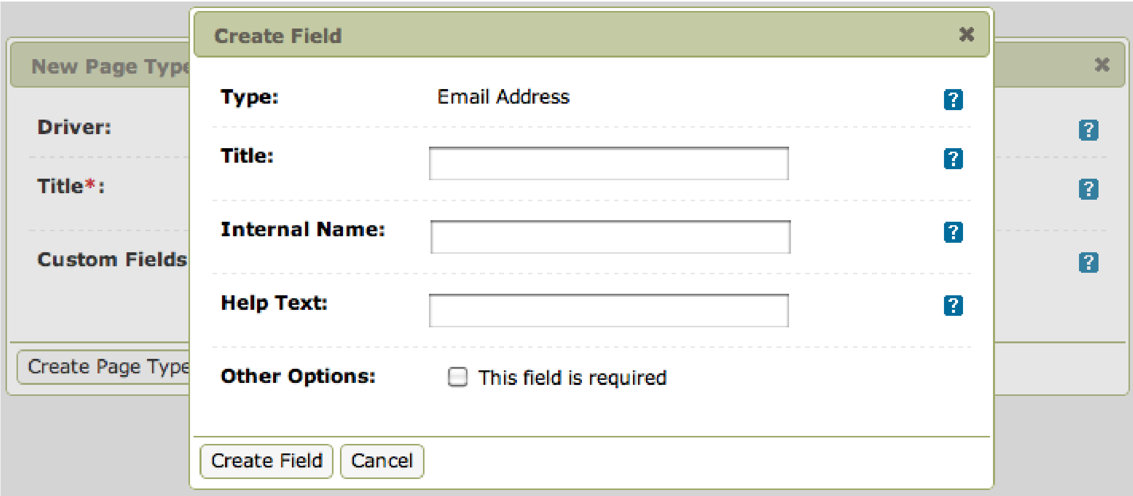
To add a new field click **Add Field**. You will then have to select the type of field you want to add. Each field type is presented differently when the custom list is output the users.

Figure 14.1. Adding a new field



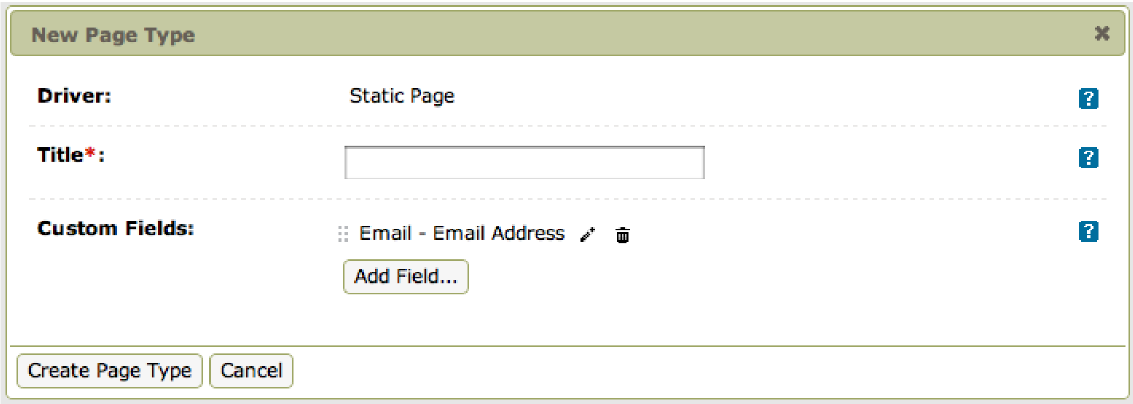
You will now be prompted to enter options for the field. The title field is what is displayed to users who fill out the field list. The internal name is how you can reference the value from your templates. If you leave the internal name blank it will be auto-generated based on the title.

Figure 14.2. Adding a new field



Once you have filled out the options click **Create Field**. The field list will now update to display the new field. The following figure demonstrates the list with the newly added field.

Figure 14.3. A custom list with a single field



Beside each field are buttons to edit and delete the field, while on the left is a drag handle for re-ordering fields within a list.

Editing a Field

To edit a field, click the edit icon beside the respective field. You will then be shown a form to make changes with. Changes are not saved until you complete the form on which the field list manager is present (so in the previous figure, changes would be saved when you click **Create Page Type**).

Important

Currently when you rename a field, any values stored for that field are not renamed. For example, if you rename a custom field stored in a user directory, the value for that field stored with each user is lost unless you rename the field back.

This was originally by design, but since this causes some limitations this functionality will be likely updated in upcoming versions of Recite CMS.

Deleting a Field

To delete a field in a custom field list, click the delete icon beside the field. You will be prompted to confirm deletion. This change is not saved until you complete the form on which the field list manager is present.

Important

Currently when you delete a field, any values stored for that field are not deleted. For example, if you delete a custom field belonging to a user directory, any data stored for that field will be retained internally. This means if you then re-create a field with the same name, the old values will be picked up.

This was originally by design, but since this causes some limitations this functionality will be likely updated in upcoming versions of Recite CMS.

Re-Ordering Fields

You can change the order of fields in a custom list by dragging fields to their desired position in the list. To drag a field, use the drag handle (the series of dots to the left of the field name). Changes to the ordering of a list are not saved until you complete the form on which the field list manager is present.

Chapter 15. Managing Content Using Your Native Operating System

Recite CMS allows you to manage web site content via your native operating system using WebDAV technology.

Specifically, you can manage files and templates. This is especially useful when building a site in Recite CMS since most web developers prefer to use their own text editor or Integrated Development Environment (IDE) rather than the provided file and text editors.

Getting Started

Before you can use Recite WebDAV, you must consult your administrator so they can set up your site for WebDAV access. The Recite CMS administration guide contains instructions for doing so.

Once your administrator has set you up for WebDAV access they will give you a special domain to use. For example, if your Control Panel is located at `http://cp.recite.example.com`, the WebDAV site might be located at `http://dav.recite.example.com`.

You will need your Control Panel username and password to access the WebDAV server.

Next you need to set up your own computer to access the WebDAV server. You can find specific instructions for doing so by visiting the WebDAV domain in your browser.

Managing File Manager Files

Once your computer is set up to access your web site via WebDAV, you can use the created drive just as you would any driver on your computer.

Warning

Be aware that most operations will take slightly longer than accessing your computer.

Managing Templates

You can manage templates using Recite WebDAV, however this is limited only to editing and deleting existing templates. That is, you cannot create new templates. The reason for this is that the type of a template must be defined prior to its creation, and this is not possible using WebDAV.

Warning

Most text editors provide an "auto-backup" feature which saves your data automatically as you are working. If your editor is set to save backups to the templates directory an error will occur, since Recite is designed so new templates must first be created using the Control Panel. Either disable this functionality or if you can, change the location where backups are saved.

Furthermore, some text editors (such as jEdit) optionally use a "two-stage save process" as a workaround to some unix-related permissions issues. You must disable this feature when editing templates stored in Recite, since this will cause an error for the same reason as in the previous paragraph.

Appendix A. Template Writing Guide

Recite CMS allows non-technical users to add dynamic content to their web site easily using the template management tools (refer to the Managing Templates chapter for more details).

Templates are written using Smarty Template Engine syntax. This appendix covers how to write templates in this format and also shows you some Recite-specific template functionality. You can find the complete Smarty manual at `http://smarty.net/manual/en/`, or you can refer to the Template Writing Guide appendix in this guide.

A pre-requisite of writing templates is some knowledge of HyperText Mark-Up Language (HTML). While technically this is not required, templates in Recite CMS are used either for HTML pages or e-mail templates.

All templates have a series of values that you can access which will determine the output of the page (or email) the template is being used for. Each template type in Recite CMS has different values assigned to it, each of which is documented with the template documentation widget that is available within the Control Panel.

For example, the calendar event listing template type will provide you with a list of events to loop over, while a template for a email contact form will include values relating to the form.

Most template types have one or more sample templates associated with them. The easiest way to create templates in Recite CMS is to use one of the sample templates as a starting point then refine it as required.

There are different ways of using these values, each of which involves a special command surrounded by curly brances (that is, `{` and `}`). Each of these ways (outputting a variable, if/else blocks and loops) are all covered in this appendix.

Variable Types

There are a number of different types of values that can be assigned to a template, each of which is used in different situations. These different types are as follows.

- *Array*. This is an array designed so you can loop over the elements using `{foreach}` or `{section}`. You can access its elements directly if required. Refer to the section on loops later in this appendix.
- *Associative Array*. This is an array designed so you can access its elements directly by their key, or you can either loop over with `{foreach}` or `{section}`. Refer to the section on loops later in this appendix.
- *Boolean*. A true/false value. Refer to the if/else blocks section later in this appendix.
- *Float*. A number, possibly with decimal points.
- *Integer*. A number.
- *Mixed*. A mixed value is one of several types. It may be an integer, string, boolean or an array.
- *String*. A string of text. Typically you should use the `escape` modifier when outputting strings.

Outputting Variables

The most fundamental concept when writing templates is how to output a variable. All variable names are preceded by a dollar symbol. To output a variable, surround its name with curly braces. The following listing demonstrates this.

Example A.1. Outputting a variable called `$title`

```
<html>
    <head>
        <title>{$title}</title>
    </head>
    <body> ... </body>
</html>
```

This is the most common way to use templates. You can output variables in this manner for all types apart from arrays and associative arrays; with arrays you will typically loop over the array and then output each value, whereas with associative arrays you will access one of the values in the array directly.

Variable Modifiers

Modifiers allow you to make a last minute change to a variable when outputting it. This is achieved by adding a pipe symbol (`|`) and the modifier name after the variable name.

For example, if you have a modifier called `date_format`, you could modify the variable `$timestamp` using `{$timestamp|date_format}`. If the `$timestamp` variable originally contained a timestamp value, then this may result in output such as `Jan 1, 2010`.

There are a number of modifiers available, each of which is documented in the Smarty Template Engine manual. Two useful examples of these are `escape` and `date_format`.

Escaping Content

Escaping content is the process of modifying variable content to ensure your site displays content correctly and is not susceptible to cross-site scripting (XSS) or cross-site request forgeries (CSRF). It is also useful for ensuring your site remains a valid HTML document.

When you escape content, you prevent HTML tags being output in your variables. This is achieved with the `escape` modifier. A good example of this is when your variable contains an ampersand (&).

Example A.2. Escaping content to maintain standards compliance.

```
<html>
    <head>
        <title>{$title|escape}</title>
    </head>
    <body> ... </body>
</html>
```

Outputting Dates and Times

In several of the template types there is date/time data made available for output. This value is in a special timestamp format, but you can output the timestamp into a "human-readable" format using the `date_format` modifier.

You can optionally pass an argument to `date_format` which indicates how the timestamp should be formatted. A full list of the available formatting strings are available at .

Note

The following examples use the built-in `$smarty.now` timestamp. You can use this variable for the current date/time.

Example A.3. Outputting timestamps using `date_format`.

```
Jan 1, 2010
{$smarty.now|date_format}

1 January 2010
{$smarty.now|date_format:'%e %B %Y'}

12:00:00
{$smarty.now|date_format:'%T'}

1 January 2010 @ 12:00:00
{$smarty.now|date_format:'%e %B %Y @ %T'}
```

Including Other Templates

It is good practice to re-use a single template as much as possible, since this means you have less templates to manage. If you have created a re-usable template, you can include it from another template using the `{include}` function. This function takes a single argument called `file` which is the name of the template to include.

This is often useful in Recite CMS if you have a number of different page templates, but all use the same HTML header (that is, they load the same CSS and JavaScript files and have the same list of meta tags).

For example, you might create the page header in a file called `header.tpl` in a directory called `misc`. The path of this file in Recite CMS would be `misc/header.tpl`. If you want to use this template from another template you would use `{include file='misc/header.tpl'}` in your template.

If/Else Blocks

With an if/else block, you can use one part of your template in one situation and a different part in a different situation. For example, if you have a template that outputs a list of news articles, you may want to show a "no messages found" type message if there are no news articles to output. In this case you would test for the number of articles being zero.

Example A.4. Using an if/else block to determine what to output.

```
{if $numberOfArticles == 0}

    No articles found.

{else}

    Output the articles here!

{/if}
```

You can also use `elseif` to test for multiple conditions. The following figure demonstrates how this may be useful. This code determines whether or not to output the word "articles" as a plural.

Example A.5. Using an if/elseif/else block to determine what to output.

```
{if $numberOfArticles == 0}

    No articles found.

{elseif $numberOfArticles == 1}

    1 article found.

{else}

    {$numberOfArticles} articles found.

{/if}
```

As an aside, you could also achieve the same output as the previous listing with the following code. Rather than using `elseif`, it uses multiple `if` statements.

Note

The `else` part of an if/else block is optional.

Example A.6. Nested if/else blocks.

```
{if $numberOfArticles == 0}

    No articles found.

{else}

    {$numberOfArticles} article{if $numberOfArticles != 1}s{/if} found.

{/if}
```

Working With Arrays

An array is a variable that holds zero or more other values. The typical operations you will want to perform with are an array are to check how many elements are in the array, and to loop over the elements in the array.

Counting an Array

To determine the number of elements in an array, use the `count` modifier.

Important

When using modifiers with arrays, you will nearly always need to precede the modifier name with an `@` symbol. This is to indicate the modifier should be performed on the array as a whole and not on each array element individually. So in this instance you would use `@count` as the modifier.

Referring to previous if/else block example, the `$numberOfArticles` variable probably won't actually exist (it was just used for the example). Realistically, if you want to output a list of articles you might have an array called `$articles` which holds the articles. The following code shows how would determine the number of articles.

Example A.7. Determining the size of an array.

```
{if $articles|@count == 0}

    No articles found.

{else}

    Output the articles here!

{/if}
```

Tip

You can assign values to temporary variables using the `{assign}` function. This function accepts two arguments: `var` and `value`. The `var` argument indicates the name of the variable to create (do not include the preceding dollar symbol), while the `value` argument accepts the value to assign. Thus, you could use `{assign var=numberOfArticles value=$articles|@count}` to create the variable `$numberOfArticles`.

Looping Over Arrays

The simplest way to loop over values in an array is to use `{foreach}`. This accepts two arguments: one called `from` (the array to loop over), and another called `item` (the name of the variable to store the element in). The `item` argument should not include the preceding dollar symbol.

Any template code you include between `{foreach}` and `{/foreach}` will be used for every element of the array (in order). The following listing demonstrates using `{foreach}`.

Example A.8. Looping over an array.

```
{foreach from=$articles item=article}
    {$article}
{/foreach}
```

Similar to if/else, you can also use `{foreachelse}`. Any code between this and the closing `{/foreach}` is executed if the array is empty.

Example A.9. Using {foreachelse}.

```
{foreach from=$articles item=article}
    {$article}
{foreachelse}
    There are no articles!
{/foreach}
```

You may instead prefer to use if/else combined with the `{foreach}`, rather than using `{foreachelse}`.

Example A.10. Using if/else with {foreach}.

```
{if $articles|@count == 0}
    There are no articles!
{else}
    {foreach from=$articles item=article}
        {$article}
    {foreachelse}
{/if}
```

Accessing an Array Element

As mentioned earlier in this appendix, there are both arrays you can loop over and associative arrays. While you can loop over associative arrays, typically you will just want to access a single element of the array directly. You can do so by using the array name, followed by a period, followed by the element name. For example, if you have an associative array called `$article` which has an element called `title`, you can access this value with `$article.title`.

Referring back to the {foreach} example, often you will loop over, say, an array of articles. Each element in this array will itself be an associative array.

Example A.11. Looping over an array then accessing another array's element.

```
{foreach from=$articles item=article}
    {$article.title}
{foreachelse}
    There are no articles!
{/foreach}
```

Outputting Braces

Sometimes you will want to output a curly brace directly in your template without it having anything to do with template code. This may arise if you want to output CSS or JavaScript in your template directly.

Using code such as the following will break your template, because the template interpreter reads the curly braces and thinks they are template instructions.

Example A.12. Sample scenario of using non-template curly braces.

```
<style type="text/css">
    body { background : #fff; }
</style>

<script type="text/javascript">
    function foo() {
        // do something
    }
</script>
```

Note

As an aside, it is good practice to never embed CSS or JavaScript directly in a HTML page. It is almost never correct to do so. Rather, you should use external CSS or JavaScript files.

To get around this, you can either wrap your CSS/JavaScript in `{literal}`, or you can output a left brace with `{ldelim}` and a right brace with `{rdelim}`.

The `{literal}` function instructs the template interpreter to ignore everything between the opening and closing tag. The following listing demonstrates this.

Example A.13. Using {literal} to embed curly braces.

```
{literal}
<style type="text/css">
    body { background : #fff; }
</style>

<script type="text/javascript">
    function foo() {
        // do something
    }
</script>
{/literal}
```

Sometimes you will want to output a variable in your template but still use a curly brace. The following listing shows how you can combine JavaScript code with your template.

Example A.14. Using {ldelim} and {rdelim}.

```
<script type="text/javascript">
    function foo() {ldelim}
        var numberOfArticles = {$articles|@count};
    {rdelim}
</script>
```

Recite Specific Plug-Ins

There are a number of Recite CMS-specific plug-ins which are not documented in the Smarty Template Engine manual. Each of these are covered in their respective chapters, and also listed below.

- `{captcha}`. Output a CAPTCHA image. Refer to Adding CAPTCHA to Forms.
- `{container}`. Output a container. Refer to Defining Container Locations
- `{contentblock}`. Output page content. Refer to Defining Editable Areas
- `{thumbnail}`. Create a thumbnail image. Refer to Thumbnails

Summary

This appendix will hopefully give you a starting point with your templates but it will take some practice to become proficient in writing and structuring your templates. Combining this appendix with the following resources will hopefully go a long way to helping you write templates:

- Managing Templates chapter.
- `Smarty Template Engine manual [http://smarty.net/manual/en/]`.
- Template documentation Control Panel widget.
- Sample templates.

Appendix B. WYSIWYG Editor Guide

Recite CMS uses an advanced web-based WYSIWYG (What You See Is What You Get) editor called CKeditor. This editor makes creation of HTML code simple with its point-and-click interface.

Using this editor, you can easily update the content on your web site through your web browser. Additionally, you can easily link to other pages in your web site or files uploaded via the Recite CMS Control Panel.

This chapter covers basic usage of CKeditor, including a summary of all toolbar buttons, how to upload files through the WYSIWYG, and how to link to existing files or pages in your site.

Tip

Although this chapter covers how to use CKeditor, you may find additional resources at its official web site `http://ckeditor.com`.

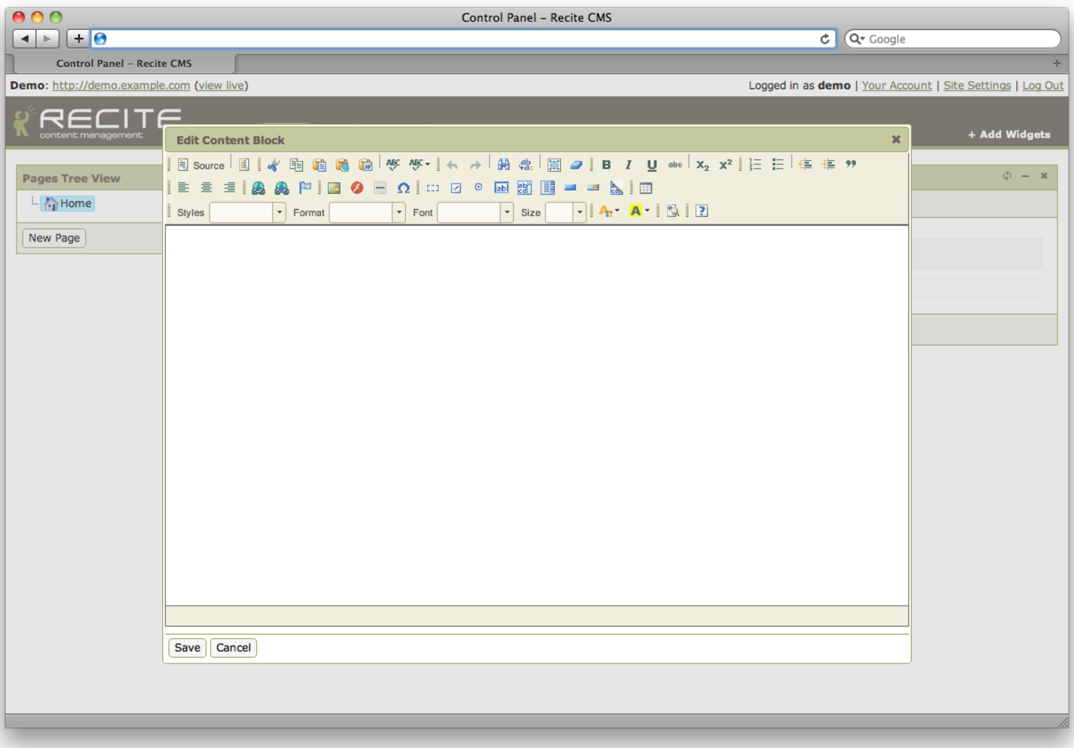
Accessing the WYSIWYG

The WYSIWYG is available in several different areas of Recite CMS. It is primarily available when editing content blocks for pages in your site, but may also be available for other tasks such as creating new calendar events.

It is possible to edit page content blocks from both the Control Panel as well as when viewing your site in "Administration Mode". The WYSIWYG works the same in both the front-end and the Control Panel.

When you open the WYSIWYG it will appear in a dialog box.

Figure B.1. The WYSIWYG loaded for editing a page content block



Using the WYSIWYG Editor

Once the WYSIWYG editor has loaded, you can type in the main white content area, just as you would if you were using a word processor.

You can use the toolbar buttons (covered in the next section) to format your content. For instance, if you want bold text, highlight the text you want to be bold and click on the corresponding toolbar button.

Caution

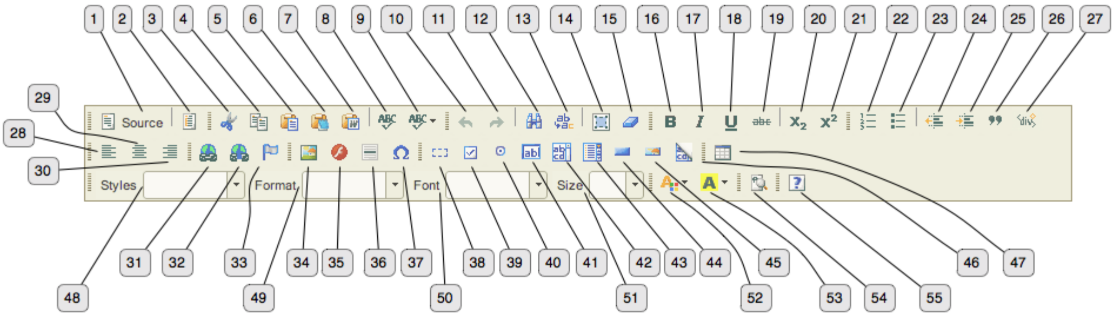
When editing your content in the WYSIWYG editor, be aware that it may not appear exactly as it will on your web site. This is because the *styles* used on your web site will likely be different to those used in the WYSIWYG editor. After saving your changes you should check your changes on your web site to ensure it looks correct.

Once you have made your changes, click the **Save** button to keep your changes and close the WYSIWYG. Clicking the **Cancel** button will discard any changes you have made and close the WYSIWYG.

WYSIWYG Toolbar

This section lists the function of all toolbar buttons in the WYSIWYG.

Figure B.2. The WYSIWYG toolbar



Content Control

1. **Source mode toggle**. Toggles between HTML source code view and point-and-click view. Using HTML source mode allows you to manually adjust the HTML code if required.

2. **Templates**. This button opens a popup that lists pre-built templates that can be inserted into the editor. See the Templates section for help on creating templates.

3. **Cut**. Remove the selection and add it to the clipboard so it can be pasted in elsewhere.

4. **Copy**. Add the selection to the clipboard so it can be pasted elsewhere.

5. **Paste**. Insert previously copied content where the cursor currently is.

6. **Paste as plain text**. Insert previously copied content where the cursor currently is, stripping out any formatting.

7. **Paste from Microsoft Word**. Insert content copied from Microsoft Word where the cursor currently is. This function removes extraneous markup generated by Word so it doesn't clutter up the HTML code on your page.

8. **Check spelling**. Checks the spelling of your content.

9. **Check spelling as you type**. Allows you to enable real-time checking of the content as you type it.
10. **Undo**. Undo the previous action you performed.
11. **Redo**. Redo an action you just undid.
12. **Find**. Search for a string in your content.
13. **Replace**. Search for a string in your content and replace it with a different string.
14. **Select all**. Select all content. This is useful if you want to copy everything or clear the content.
15. **Remove formatting**. Turns the selection into plain text. For instance, if you have bold text, select the text and clicking this button will remove the bold formatting.

Text Elements

16. **Bold**. If text is selected, this button will make it bold. If it's already bold then this formatting will be removed. If no text is selected then bold will be enabled (or disabled) for text you now type.
17. **Italics**. If text is selected, this button will italicize it. If it's already in italics then this formatting will be removed. If no text is selected then italics will be enabled (or disabled) for text you now type.
18. **Underline**. If text is selected, this button will underline it. If it's already underlined then this formatting will be removed. If no text is selected then underline will be enabled (or disabled) for text you now type.
19. **Strikeout**. If text is selected, this button will add a line through the text. If it's struck-out then this formatting will be removed. If no text is selected then strikout will be enabled (or disabled) for text you now type.
20. **Subscript**. If text is selected, this button will make it subscript (below the line). If it's already subscript then this formatting will be removed. If no text is selected the subscript will be enabled (or disabled) for text you now type.
21. **Superscript**. If text is selected, this button will make it superscript (above the line). If it's already superscript then this formatting will be removed. If no text is selected the superscript will be enabled (or disabled) for text you now type.
22. **Numbered list**. This button inserts a numbered list where the cursor is. If you have several paragraphs selected it will turn them into a numbered list.
23. **Bullet list**. This button inserts a bulleted list where the cursor is. If you have several paragraphs selected it will turn them into a bulleted list.

Paragraph Alignment

24. **Decrease indent**. This button decreases the indent (left margin) of the current paragraph(s).
25. **Increase indent**. This button increases the indent (left margin) of the current paragraph(s).
26. **Blockquote**. This button adds a margin to the left and right of the current paragraph(s).
27. **Create Div Container**. This button is used for inserting a HTML DIV element.
28. **Left-align paragraph**. Makes the current paragraph(s) left aligned.
29. **Center paragraph**. Makes the current paragraph(s) centered.
30. **Right-align paragraph**. Makes the current paragraph(s) right aligned.

Page Elements

31. **Insert hyperlink**. Turn the current selection into a link. This button will open a dialog with various options for creating the link. Click the **Browse Server** button to find a file or page from your web site to link to. Refer to File Browser for more information.

32. **Remove hyperlink**. If the current selection is a hyperlink this removes the link.

33. **Insert anchor**. This inserts a marker at the current location that you can subsequently link to.

34. **Insert image**. Insert an image at the current location. This button opens a dialog with various options for inserting an image. Click the **Browse Server** button to find an image on your web site. Refer to File Browser for more information.

35. **Insert Flash**. Insert an Adobe Flash move at the current location. This button opens a dialog with various options for inserting a Flash movie. Click **Browse Server** to find a Flash movie to insert from your web site. Refer to File Browser for more information.

36. **Insert horizontal line**. Insert a horizontal line at the current location.

37. **Insert special character**. This button will open a dialog with a list of special characters you can choose to insert at the current cursor location.

Forms

38. **Insert form**. Opens a dialog with various options for creating a form. Once you have created a form you can then insert form elements.

39. **Insert checkbox**. Opens a dialog with options for inserting a checkbox in the current location.

40. **Insert radio button**. Opens a dialog with options for inserting a radio button in the current location.

41. **Insert single-line text field**. Opens a dialog with options for inserting a text input in the current location.

42. **Insert multi-line text field**. Opens a dialog with options for inserting a text area input in the current location.

43. **Insert select box**. Opens a dialog with options for inserting a drop-down select box in the current location.

44. **Insert button**. Opens a dialog for inserting a button (such as a form submit button) in the current location.

45. **Insert image button**. Opens a dialog for inserting an image button in the current location. Click the **Browse Server** button to find an image from your web site. Refer to File Browser for more information.

46. **Insert hidden field**. Opens a dialog for inserting a hidden form value in the current location.

Tables

47. **Insert table**. Opens a dialog with options for inserting a table in the current location.

Text Formatting

48. **Styles dropdown**. This drop-down allows you to format the current selection using a pre-defined style. This list can be customized - refer to Customizing the WYSIWYG for more information.

49. **Formatting dropdown**. This drop-down allows you to format the current selection so it is a heading or otherwise.

50. **Font dropdown**. This drop-down allows you to change the font face of the current selection.

51. **Size dropdown**. This drop-down allows you to change the font size of the current selection.

52. **Text colour**. This drop-down allows you to change the text colour of the current selection.

53. **Background colour**. This drop-down allows you to change the background colour of the current selection.

Miscellaneous Buttons

54. **Show/hide blocks**. This button is used to expose HTML blocks (such as paragraphs) to give you more control over content and its layout.

55. **About WYSIWYG editor**. This button opens a dialog with information about the WYSIWYG editor.

File Browser

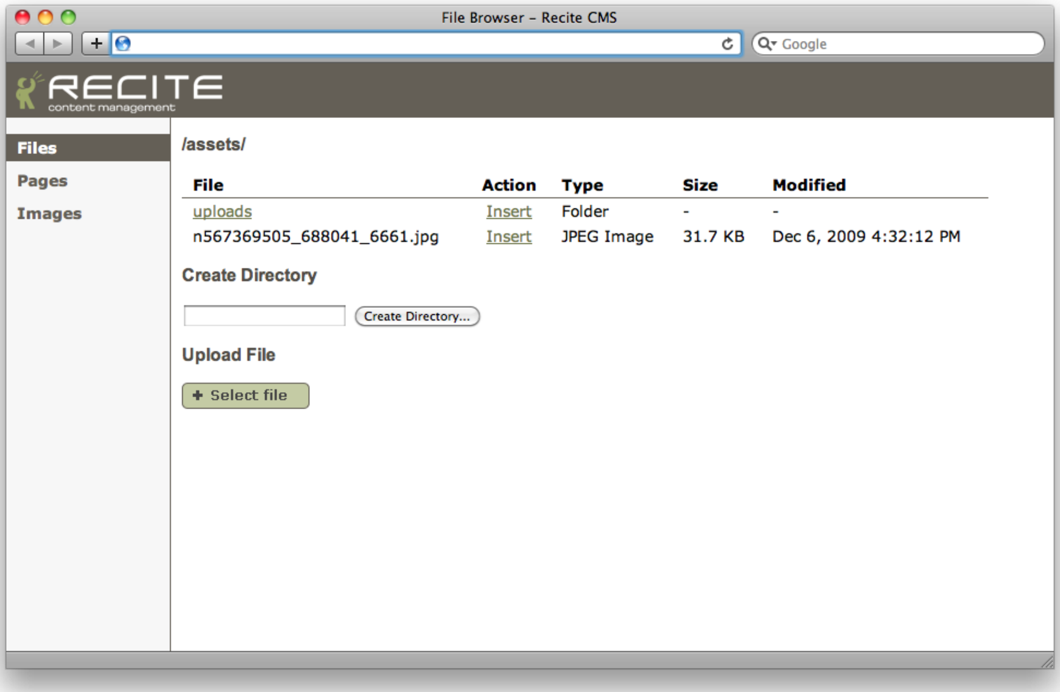
Certain features of the WYSIWYG (such as inserting a link or inserting an image) allow you to browse the server to find the relevant file or page.

Note

When inserting an image, only images are shown to you - all non-images are filtered out automatically.

When you choose the browse the server, a new popup loads which lists files and pages and available to you.

Figure B.3. The WYSIWYG file browser



In the left column are the different types of items you can link to. In the main area is the list of files (if any). If the item is folder, click the folder name to load the folder and view any files and sub-folders.

To insert a folder or file back into the WYSIWYG, click the **Insert** button beside the item.

You can create sub-folders and upload files using the respective options in the file browser. Note however that you cannot do this for the **Pages** section of the file browser.

Inserting Thumbnails

If you are using the browser to insert a link to an image, you can also insert a link to a thumbnail of the image. Each image has beside it a link labelled **Thumbnail**.

Clicking this link will open options for the thumbnail directly beneath the image. You can then specify the dimensions of the thumbnail (pre-filled with the dimensions of the original image).

If you choose to pad or crop the image, the produced thumbnail will be exactly the dimensions you specify (even if it doesn't match the width-height ratio of the image). Otherwise, the thumbnail will be no wider or taller than the specified dimensions (but it may be less).

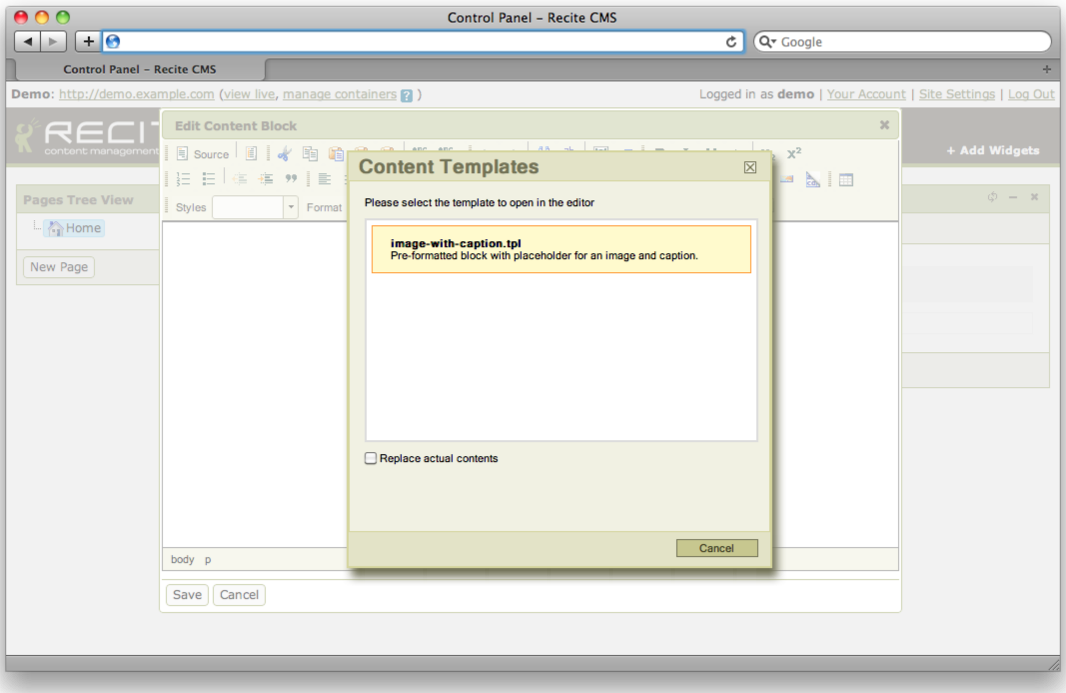
Templates

The **Templates** button on the WYSIWYG toolbar allows you to insert pre-defined HTML code into the editor area.

To create a template that appears in this list you must create a new template in Recite (refer to the Managing Templates chapter), which has type **WYSIWYG Template**.

The name of the template and its description appear in the template listing in the WYSIWYG.

Figure B.4. Inserting a pre-defined template



In the above figure, the template's named is `image-with-caption.tpl` and its description is shown below. Clicking on the template will insert its content into the editor area.

Note

The special template tags as covered in Template Writing Guide have no meaning in these templates.

Customizing the WYSIWYG

The WYSIWYG can be further customized in two ways: firstly, by defining the list of custom styles that appears in the **Styles** toolbar dropdown; and secondly, by defining how the editor area of the WYSIWYG looks when using it.

The first is useful in that it allows you to easily format your markup as required on your web site, while the second is useful so you can make the WYSIWYG look similar to your web site.

Both of these changes are achieved in Recite CMS by creating a special stylesheet in the Recite CMS file manager.

Once the file has been created, open the **Site Settings** dialog and select the **Global Settings** package. Select the newly created stylesheet in the **Editor Stylesheet** setting and click **Save Settings.**

Any styles defined in this file will used for displaying the WYSIWYG editor.

In order to populate the styles dropdown you must a special tag in the stylesheet for each entry in the drop-down. This tag must appear in the CSS comment (which begins with `/*` and ends with `*/`).

Inside this comment you must include the special tag `@wysiwyg`, followed by the name you want to appear in the drop-down.

Example B.1. Sample CSS entry for styles dropdown

```
/* @wysiwyg My Custom Style */
div.foo { background : #f00; }
```

Next time the WYSIWYG is loaded this style will be available in the **Styles** drop-down.

Figure B.5. The styles drop-down with a custom style