

web**e**dition

Content Management System

The webEdition User Guide Plus



webEdition 3.5 and modules

webEdition 3.5

User Guide

Standard 3.5.1
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About this document

Purpose of this document

The webEdition User Guide provides an overview of webEdition's features and an introduction to all the processes you will use to operate the Standard Version of webEdition. This manual has been designed to include a complete description of how to use webEdition to create new Web sites, and how to adopt and modify existing Web sites.

This User Guide has the following sections:

- Introduction to webEdition
- User controls and description of the webEdition interface
- Role of the webEdition editor
- Role of the webEdition administrator
- List of important terms

For additional information about the installation process and the suite of webEdition modules, see the *webEdition Installation, Update and Backup Procedures*. This document is available on the webEdition documentation Web page.

Audience

This document is intended for personnel in the following groups:

- Web administrators
- Web editors

The webEdition customer documentation suite

The documentation team publishes new webEdition documents to support the release of all webEdition features, modules and enhancements.

You can consult our documentation suite for detailed information about the modules you have purchased or about webEdition products that you may wish to purchase in the future. All customer documentation is available in portable document format (PDF) on the webEdition documentation Web page.

On-line reference documentation

The webEdition customer documentation suite comprises the following books, all of which you can obtain at URL:

<http://www.webedition.de/english/downloads/Documentation.html>

Standard webEdition documentation

The following books support the webEdition Standard suite:

- *The webEdition User Guide*
- *The webEdition Installation, Update and Backup Procedures*
- *The webEdition Tag Reference*

Documentation for webEdition modules

The following books support the webEdition modules:

- *The Customer Management and Customer Management PRO Module User Guide*
- *The Database/Object Module User Guide*
- *The Editor Plug-in User Guide*
- *The Newsletter Module User Guide*
- *The Scheduler and Scheduler PRO Module User Guide*
- *The Shop Module User Guide*
- *The Task/Messaging Module User Guide*
- *The User Management and User Management PRO Module User Guide*
- *The Workflow Module User Guide*

What precautionary messages mean

webEdition documents include attention and caution messages, which are designed to draw your attention to important instructions.

Attention boxes

An attention box identifies information that is necessary for the proper performance of a specified task. For example:

ATTENTION

You must have the appropriate permissions in your user profile to complete this procedure. Permissions are assigned to you by your webEdition system administrator. Contact your webEdition system administrator for further details.

Caution boxes

Caution messages indicate that there are possible risks to your software or database if you perform a specified task without taking the suggested appropriate precautions. For example:

**CAUTION****Database warning**

If you complete this procedure, your database will be overwritten.

How commands, system responses and we:tags are represented

The commands, system responses and webEdition tags (called we:tags) used in this document conform to the following conventions.

Web interface commands

Commands performed through a Web browser are shown in *italic* typeface. For example:

Click on the *Save* button.

Menu-based commands performed in a Web browser are shown in *italic* typeface. Drop-down or nested menu commands are separated by an input prompt (>). For example:

Select *Customers* > *New* from the main menu of the Customer Management Module.

webEdition tags and template code

The webEdition templates use a specialized set of programming tags based on the PHP programming language. These webEdition tags or we:tags are displayed in *courier* typeface and in angled brackets:

Opening tags appear thus: `<we:tag/>`

Closing tags appear thus: `</we:tag>`

The programming code used in webEdition templates is also represented in this document by *courier* typeface:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print"/><br>
Logged in
</we:ifRegisteredUser>
```

Attribute variables

Attributes and variables appear in *courier italic* typeface. For example:

```
<we:hidden name="attribute1">
```

How to check the document version and issue

The information on the title page of this document indicates the version and issue for this publication. The version and issue also appear in the footer on every even-numbered page.

The first two digits in the document numbering scheme indicate the version. The version number increases each time the document is updated to support a new software release. For example, the first release of a document is 01.01. In the next software release cycle, the first release of the same document is 02.01.

The second two digits in the document numbering scheme indicate the issue. The issue number increases each time the document is revised and re-released in the same

software release cycle. For example, the second release of a document in the same software release cycle is 01.02.

Customer service

For further information about webEdition, please consult our Web page, or contact our customer service department:

- Web Page: <http://www.webedition.biz/>
- E-mail:
 - Technical support: technik@webEdition.de
 - Sales: sales@webEdition.de
 - Information/Help: info@webEdition.de

1 Introduction

This introduction is intended to help new users familiarize themselves with the webEdition content management software. If you have used previous versions of webEdition and are already familiar with the software, you can skip to Section 1.4, "What's new in webEdition 3.0?" on page 36.

This chapter treats the following topics:

- Section 1.1, "What is webEdition?" on page 33
- Section 1.2, "How does webEdition work?" on page 33
- Section 1.3, "webEdition users: template administrators and Web page editors" on page 35
- Section 1.4, "What's new in webEdition 3.0?" on page 36
- Section 1.5, "What's next..." on page 37

1.1 What is webEdition?

webEdition is a database-grounded Web content management system (CMS). A CMS is a software application that allows you to develop, administer and control the information and the format of your Web page. Unlike file-based systems, which write new content to new HTML pages and then manipulate the content using a complex management system, webEdition stores all content information (such as text, images, graphics, Flash movies, style sheets) in a central database.

The webEdition program only has to be installed once on the server of your service provider. This is done using a simple installation program run on a computer with Internet access. All operations thereafter are performed through a standard Web browser. There is no need for you to install any additional software on your local terminal.

The architecture of webEdition reflects the philosophy of separating content and layout. Your web content (text, images, etc.) is stored in a database; the layout of your web pages is controlled by templates.

1.2 How does webEdition work?

The following subsections describe how the webEdition CMS operates from the point of view of content architecture, layout and management. These concepts are integral to understanding how webEdition works.

1.2.1 About webEdition database architecture and content storage

webEdition uses MySQL, a database system that is supported by almost all major Internet service providers. There are several advantages to this architecture. Because all of your content is stored in a database, the HTML-coded web page itself does not have to be edited if the content has to be changed. An editor only has to change the database entry using the simple WYSIWYG webEdition interface and then re-save the corresponding page. In addition, the content stored in the database can be rapidly searched (and modified) or used in other ways (for example, as a central data repository). Moreover, the database runs primarily in the background, and once installed, its operation is transparent to the front-end user.

1.2.2 About webEdition templates and web page layout

webEdition works with templates. Templates are pages programmed using HTML and PHP that act as a guide to form the structure of a Web page. These pages contain the basic layout for your Web pages. Templates impose a consistent format upon your Web site, and permit only certain areas of the page to be edited.

Templates are normally created using HTML and expanded using we:tags. Non-variable areas of your page are coded in HTML. The areas you wish to edit or change (such as text, images, graphics) are marked with we:tags. The we:tags will act as placeholders for variable data.

If you are setting up a new web site, you can either create the templates yourself or you can have them created by your internal design department or by an agency. You can set up your entire Web site in webEdition, since it also acts as a completely functional HTML editing program. Templates developed using other HTML editing programs can be imported directly or merely copied and pasted to webEdition. Importing an existing Web site is also possible by merely inserting the appropriate we:tags where the hard-coded text, images, link lists etc. are located.

1.2.2.1 About graphics and images

webEdition differentiate between layout images and images/graphics that are dependent on content. Layout images have no connection to the content and only affect the appearance of the page. Layout images that are already present in the templates do not have to be imported to webEdition, since they do not have to be managed using the database. If, however, something in the layout needs to be modified, the template must be changed and re-saved.

Unlike layout images, content-related images or graphics (such as product photos or charts) are managed and edited with the webEdition system in the same way as texts.

1.2.3 About we:tags and content management

Web site content is managed using webEdition tags (we:tags). They comprise a syntax based on XML that stores functions in an actions library and then integrates them when the page is called. This system makes creating text areas, summary pages, or images a matter of entering a few we:tags. The we:tags are very simple in structure and are easily understood by anyone with a basic understanding of HTML. To make finding, understanding and using we:tags easy, webEdition also provides a Tag Wizard along with an on-line *Tag Reference Guide*.

The we:tags are only used by the administrator when a template is being created. Thereafter, the editor who will work with the templates to enter or edit data for the web pages does not have to be familiar with the we:tags.

1.3 webEdition users: template administrators and Web page editors

webEdition differentiates between the role of the editor and that of the administrator. Each role requires a different skill-set, and the tasks assigned to each role are governed by different webEdition user permissions. Depending on the size of your company or organization, the editor and the administrator can be one and the same person.

1.3.1 The role of template administrators

The template administrator is responsible for the design and creation of the templates. He or she is required to have a basic understanding of HTML, since the webEdition tags (we:tags) have to be inserted in a pages created using HTML.

Administrators also perform the following system-level tasks:

- Installing modules
- setting user permissions
- performing backup and restore functions

Note: The first person to install webEdition automatically has administrative rights for the system. For details regarding installation procedures and system-level permissions, see the *webEdition Installation, Update and Backup Procedures*. For an overview of the user-level controls available in the extended webEdition suite, see the *User Management Module User Guide*.

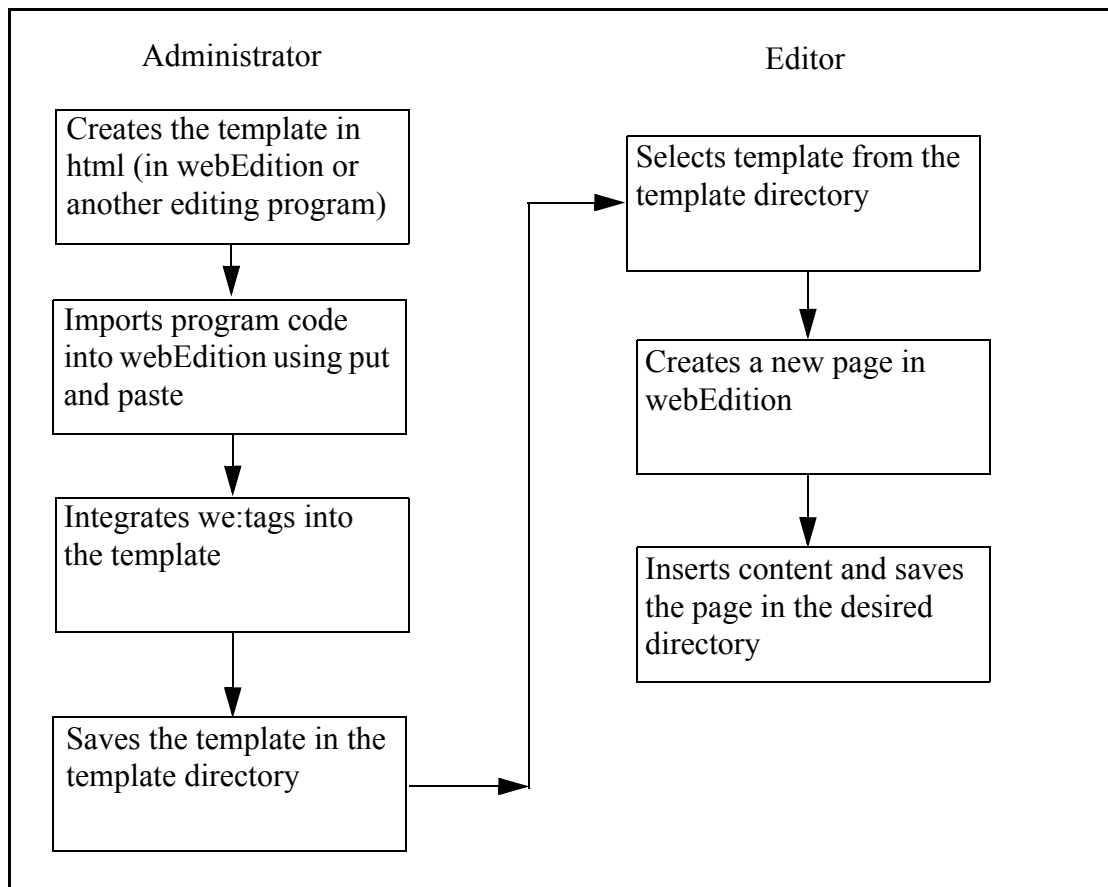
1.3.2 The role of Web site editors

Editors are generally involved in creating and updating Web documents. The editor only has to know what the input boxes look like on the webEdition templates in order to fill the fields with text. Their tasks can also include such things as integrating images or generating link lists, but these tasks do not require any programming knowledge. The webEdition editors need not concern themselves with the database; they work directly with their Web sites using the input boxes on their actual Web pages.

If editors want to create a new page, they simply call up the template to be used for the page (so they do not have to worry about the layout), enter the desired text and/or images, and then save the new page. This process does not require editors to be familiar with HTML editing programs, or FTP.

1.3.3 The workflow within webEdition

A “workflow” refers to the activities a page must to pass through before it can be published. Figure 1 shows a diagram portraying a simplified workflow with webEdition and the roles played by both the administrator and the editor.

Figure 1 The webEdition workflow

1.4 What's new in webEdition 3.0?

If you have upgraded to webEdition 3.0, you will find the following changes and enhancements to the user interface:

- Revised menus on the webEdition main screen. The commands available from the drop-down menus have been reorganized. For further details, see Chapter 2, "User controls,".
- Super-Easy-Edit-Mode (seeMode). See Section 2.5.2, "The editing screen in Super-Easy-Edit Mode" on page 59.
- XML Import/Export.
- Extended full text search: the content of Word (.doc and .rtf), Excel and Powerpoint (.xls and .ppt /.pps) documents are fully searchable.

All non-webEdition documents (such as PDF, Word, Excel, Powerpoint, .rtf, etc.), can be assigned a title, description, keywords and categories to facilitate the search feature. See Section 4.4.6, "Search feature" on page 137.

- Copy directories feature. You can copy all of the contents of a selected directory (including sub directories) to the currently active directory in one step. For details, see Section 3.2.8, "Copying the contents of one directory to another" on page 73

1.4.1 What's new in webEdition 3.2?

webEdition Version 3.2 introduces features for the production and care of accessible or "barrier-free" Web site contents. Some of the new features are:

- The WYSIWYG editor includes extended language settings, an acronym reader, and table and cell summaries that impart information about the structure of tabular data that would otherwise be lacking in voice output. For details, see Section 3.7.5.3, "Accessibility functions of the WYSIWYG Editor (Version 3.2)" on page 103
- Version 3.2 integrates services to check the validity and/or the accessibility of web sites in accordance with the rules of the World Wide Web Consortium (W3C). For information on validating your site, see Section 2.2.9, "Validation view (from Version 3.2)" on page 48, and Section 3.1.5, "The Documents Validation view" on page 67.
- Fields have been added to the hyperlink dialog boxes that provide the opportunity to enter alternative text strings that will describe the links. See Section 3.7.7.1, "Accessibility enhancements for links in Version 3.2" on page 111

1.5 What's next...

The rest of this *Guide* is written with a user-based workflow model in mind. The next chapter provides a description of the user interface. Thereafter, one chapter has been written for editors, who will be working with the finished templates and who do not need to be able to use we:tags. The other chapter is intended for administrators, who create the templates and are responsible for ensuring the integrity of their Web sites.

2 User controls

This chapter describes the webEdition user interface and how to use its basic controls. It is intended for both editors and template administrators. This chapter treats the following topics:

- Section 2.1, "Starting webEdition" on page 39
- Section 2.2, "Preferences" on page 42
- Section 2.3, "The webEdition menu structure" on page 51
- Section 2.5, "Viewing modes: standard and Super-Easy-Edit Mode" on page 58

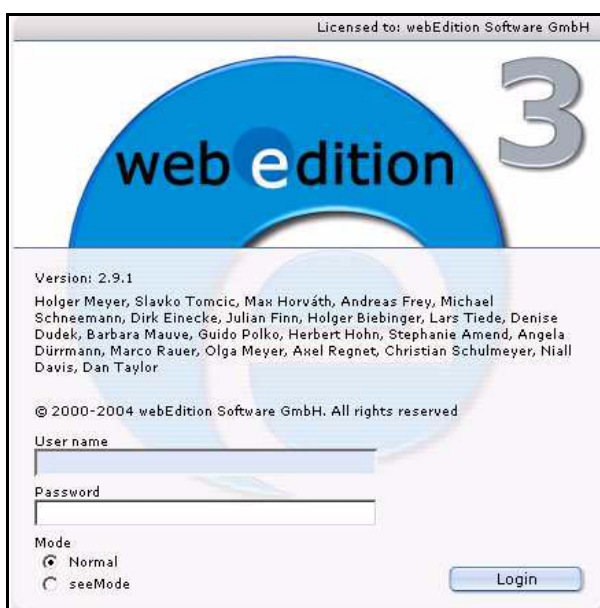
For information on installing webEdition, see *The webEdition Installation, Update and Backup Procedures*.

Specific information about how to create and maintain webEdition documents is found in Chapter 3, "Working with documents – the role of the editor" on page 63. Information on how to create and use templates is found in Chapter 4, "Creating templates—the role of the administrator" on page 117.

2.1 Starting webEdition

In your browser enter `www.yourdomain.com/webEdition/`. The login screen appears (see Figure 2). Enter your User name and Password in the designated fields.

Figure 2 The webEdition login screen



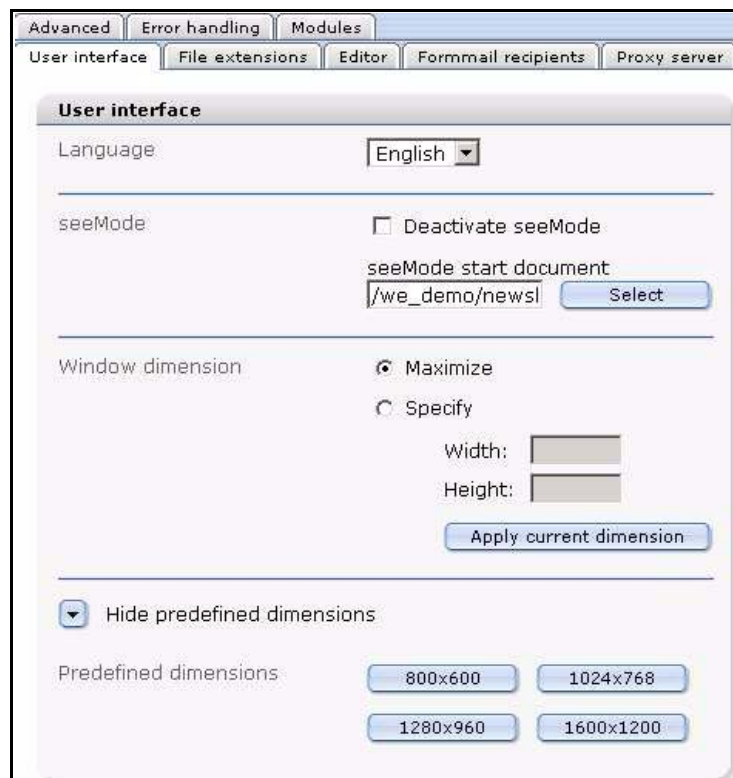
The first time you enter your user name and password, you always enter "admin" and "admin". After entering your user name and password, click *Login*.

At the bottom of the screen under the word *Mode* there are two radio buttons where you are given the option of choosing the viewing mode you wish to use, either *Normal* or *seeMode*. For more information about the two viewing modes in webEdition, see Section 2.5, "Viewing modes: standard and Super-Easy-Edit Mode" on page 58.

2.1.1 Selecting your language

Choose *Options > Preferences....* The *Preferences* window opens. Click on the *User Interface* tab. The User Interface view appears (see Figure 3).

Figure 3 Preferences: selecting your language from the User interface view



In the *Languages* area, select your language from the select box. Click the *Save* button at the bottom of the window. After saving your language preference, the webEdition display changes to the language you have selected.

Note: Information about other functions in the *Preferences* window is presented in Section 2.2.

2.1.2 The webEdition main screen

The controls for webEdition can be found on the webEdition main screen in the drop-down menus *File*, *Options*, *Modules* and *Help*, located at the top of your browser window (see Figure 4). To the right of the menus, are the navigational control icons *Home*, *Reload*, *Back* and *Forward*. Below the drop-down menus on the left side of the screen, is the explorer menu which displays the structure of your Web site. To the right

of the explorer menu is the editing screen (which is explained in Section 2.5.1, "The editing screen in standard mode" on page 58).

Figure 4 webEdition main screen showing menus, tabs and *Quickstart* screen



Note 1: For your browser to be able to display the menu bar, it must be Java-compliant. If you do not have Java installed on your browser and do not plan to install it, the webEdition menus will be displayed as three individual drop-down menus. They will appear in the same order, but will only have one level.

Note 2: If you have only just installed webEdition, the menu will only display the `we_demo` directories with our sample Web site. All examples in this manual are based on `we_demo`. Your own pages will be set up in the root directory and not in the `we_demo` directory.

2.1.2.1 The *Quickstart* options

The *Quickstart* options are displayed in the middle of the editing screen (see Figure 4, "webEdition main screen showing menus, tabs and Quickstart screen" on page 41). You can start by performing one of the following basic actions:

- *Open document*. Opens a document or template
- *New document*. Creates a new document
- *New template*. Creates a new template
- *New directory*. Creates a new directory
- *Unpublished pages*. Shows an overview of unpublished pages
- *Preferences*. Opens the Preferences dialogue box

You can return to the webEdition main screen by selecting *File > Quickstart*.

2.2 Preferences

Select *Options > Preferences...* to open the *Preferences* screen (see Figure 3, "Preferences: selecting your language from the User interface view" on page 40).

Note: Some preferences are restricted to administrators. The preferences that are visible are dependent upon the User Management Module that you have installed.

- If you have installed either the User Management or the User Management PRO Module, the following preferences are available only to the administrator: *Proxy*, *Advanced*, *Modules*.
- If you have installed the User Management Module, the following preferences are available only to the administrator: *seeMode*, *File Extensions*, *Formmail recipients*.
- If you have installed the User Management PRO Module, the following preferences can be set by users if special permissions have been granted by the administrator: *seeMode*, *File Extensions*, *Formmail recipients*.

The *Preferences* screen has the several tabs (see Figure 3, "Preferences: selecting your language from the User interface view" on page 40); the functions of which are described in the following subsections.

2.2.1 The User interface view

The *User interface* view has the following areas (see Figure 3, "Preferences: selecting your language from the User interface view" on page 40):

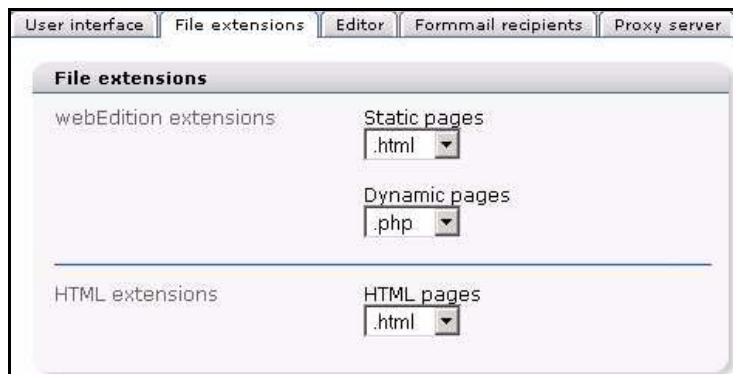
- *Language*. Use this select box to choose the language of the user interface.
- *seeMode start document*. When you login into seeMode, webEdition needs to know what document it should display at startup. If no start document is set and you login into seeMode, webEdition automatically asks you for the start document.

You can deactivate the seeMode by clicking on the *Deactivate seeMode* checkbox. If you do so, the seeMode option will not be available to you on the login screen

- *Treemenu*. Define the maximum number of items being displayed in the left navigation.
- *Window dimension/Predefined dimensions*. These settings allow you to manipulate the appearance of the webEdition interface. Select the *Maximize* radio button and the main webEdition window always opens as large as possible. If you prefer to have the window open in a different size, select *Specify* and set the pixel values or use the *Predefined dimensions* area to choose from commonly used pixel values.

2.2.2 The File extension view

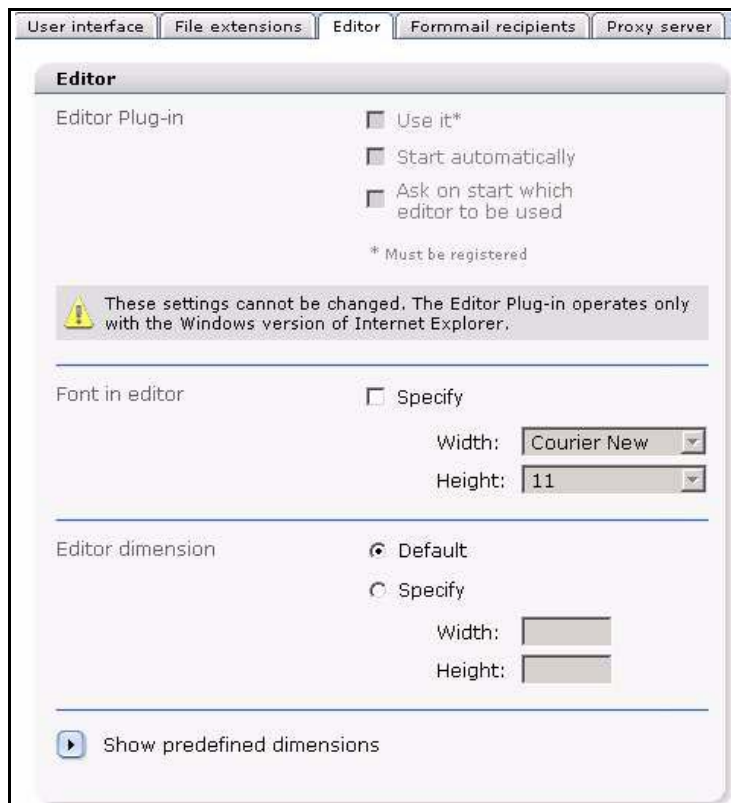
The *File extensions* view has the following areas (see Figure 5):

Figure 5 File extensions view

- *webEdition extensions*. In this section, you can specify the default extension for static and dynamic pages.
 - *Static pages*. Choose the default extension for static pages from the select box. This value is generally .html or .htm for HTML pages. You can also set .asp for Active Server Pages or .jsp for Java Server Pages, if necessary. However, this should only be done if the appropriate code has been implemented in the template. If you wish to use PHP code in your template, you will have to store the page as a dynamic page (see the next item).
 - *Dynamic pages*. Specify the extension for dynamic pages (generally .php or .PHP4). This extension will cause the Web server to execute PHP4.
- *HTML extensions*: Specify the default setting for HTML pages. If you primarily use PHP scripts or other similar scripts, you can also select the corresponding extension.

2.2.3 Editor view

The *Editor* view has the following areas:

Figure 6 The *Editor* view

- *Editor-Plug-in*. This feature is only available if you use Microsoft Windows with the Internet Explorer, and if you have purchased a licence from webEdition to use the Plug-in. Activate the *Start automatically* checkbox to load the Plug-in every time you click the *Edit* tab in a template. Activate the *Ask on start...* checkbox, and webEdition will ask you which editor to use every time the Plug-in is started.
- *Editor dimensions/Predefined dimensions*. These controls operate like the *windows dimensions* described under the *User interface* view.

2.2.4 *Formmail recipients* view

With the *Formmail recipients* view, you can enter the addresses to which formmail can be sent. If no addresses are specified, the formmail function is blocked. If you have used the formmail function in prior versions of webEdition, you must enter the addresses which are defined in the template (<we:form type="formmail"> under "recipients") in the formmail recipients function. For further details, see Section 4.4.7, "E-Mailing a form" on page 138.

Figure 7 The Formmail recipients view

2.2.5 Proxy server view

Set the *Proxy server* view preferences if your Web server requires a proxy server to create a connection to the Internet (as in the case of a corporate network, or intranet).

Figure 8 The Proxy server view

2.2.6 Advanced view

The *Advanced* view has the following areas:

- *Default settings for the PHP attribute in we:tags.* You can assign whether or not the editor ought to be given the right to enter PHP code in an entry field (for example, `<we:input type="text"/>`, `<we:textarea/>`). Generally the setting (default = false) is such that the editor is prohibited from writing PHP code in the entry field. In order to override this restriction, set the value in the drop-down menu to "true". It is also possible to override this restriction by using the we:tags (for example: `<we:input type="text" php="true"/>`).
- *Default value for the inlineedit attribute in <we:textarea>.* If you select *true*, you can edit the textarea directly on the same Web page. If you select *false*, you have to click first on the *Edit* button. A new window will open where you can edit the textarea. If there are many textareas, the value *false* is recommended, as the web page will load much faster.

- *Type of database connections.* Select the method in which you will connect to the MySQL database. There are two types:
 - *connect.* Normal connection to the database. The system will connect to the database using the server address, MySQL account name and password that has been entered into webEdition by the administrator when the program was installed. If the connection fails, the program will stop running.
 - *pconnect.* Persistent database connection. This type of connection behaves similarly to normal connections with two exceptions. Before a new connection is made to the database, the system attempts to use an existing persistent connection to the same database with the same user name and password. If no such idle connection exists, a new connection is established. Second, the connection to your MySQL server is not closed when the PHP script exits. It remains idle to be used at a later stage.
- Note:** If you are unsure about what type of connection to use, choose *connect*.
- *HTTP authentication.* Activate the checkbox if your server uses HTTP authentication. Thereafter, enter your username and password in the required fields.
 - *Thumbnail directory.* Select a directory for thumbnails.

Figure 9 The Advanced view

The screenshot shows the 'Advanced' configuration window. It includes the following settings:

- Default settings for *php-attribute* in *we:tags*: false
- Default value for the *inlinedit* attribute in *<we:textarea>*: true
- Type of database connections: connect
- HTTP authentication:
 - ☐ Server uses HTTP authentication in the webEdition directory
- User name: [text input field]
- Password: [text input field]
- Thumbnail directory: /_we_thumbs_ [Select button]

2.2.6.1 Options in the Advanced view from Version 3.2

The following options appear in the *Advanced* view from Version 3.2 on:

- *Max Upload Size displayed in mouse-over "hints"* (see Figure 10 on page 47). In order to ensure that when uploading files to their Web site, editors do not exceed the maximum upload limits set for your PHP server, webEdition allows the

administrator to enter a value that will be displayed in the hint (or mouse-over) text as guidance for editors.

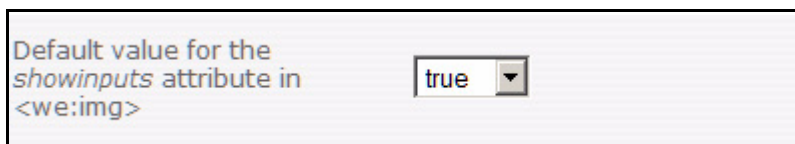
Figure 10 “Hint” text about the maximum upload size



Note: The values provided by the server and PHP are not changed here; here the administrator defines a maximum value (that is, a value less than that prescribed by the server) which is intended to help the editors.

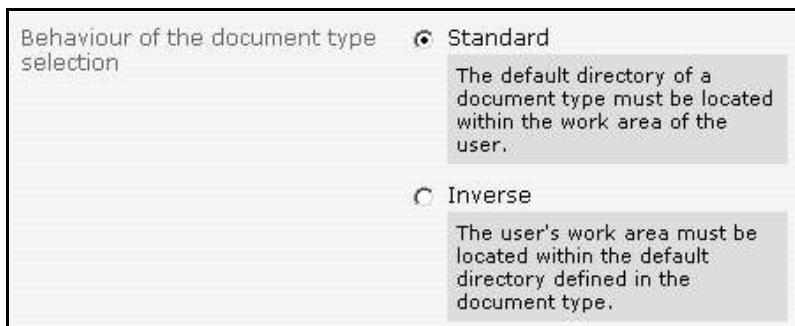
- *Default value for the `showinputs` attribute in `<we:img>`.* Set this attribute to *true* to display to your web site editors the *Alt* (alternative text) and *Title* fields for images if they are working with accessible or barrier-free sites. The *show inputs* field can be toggled to false (off), if you are not working with an accessible web site and want to keep unnecessary fields from the view of your editors.

Figure 11 Showinputs



- *Behaviour of the document type selection.* Use this field to define the document types available to your users.

Figure 12 Behaviour of the document type selection



2.2.7 Error handling view

This view gives you the opportunity to control what system-generated messages are displayed.

Figure 13 Error handling view

•*Error handling.* If you want webEdition to display notices, warnings and/or errors, activate the error handling.

•*Handle these errors.* These options allow you to select what error messages the system is to treat.

•*Displaying of errors.* These options allow you to view error messages immediately on-screen, in an error log, and as an E-mail message.

•*Expert settings: Show debug frame.* You can turn

the debug frame on or off in either normal or seeMode by selecting the designated checkbox. When activated, a frame where debugging information can be seen appears at the bottom of your screen. The debugging frame can be used to diagnose problems.

2.2.8 Modules view

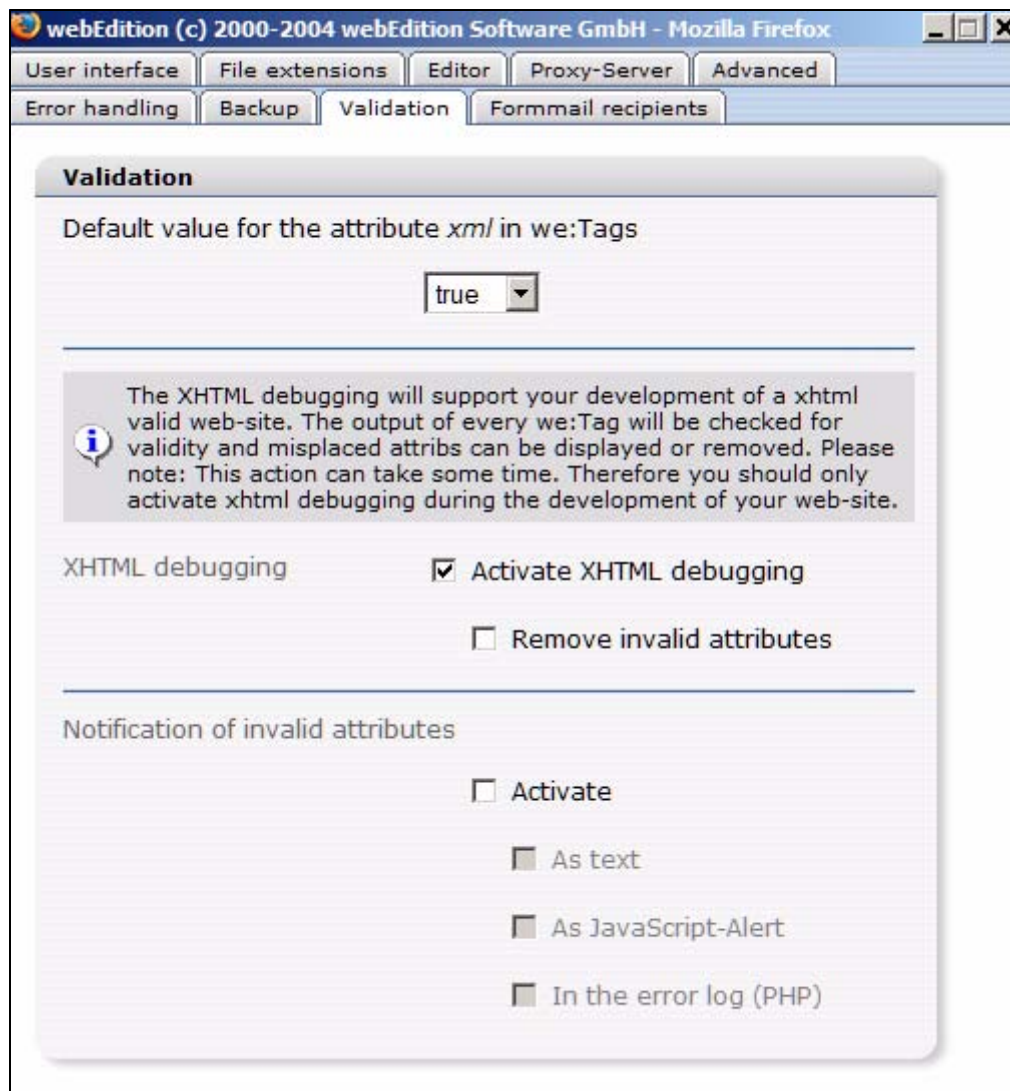
The *Modules* view allows you to set preferences for the modules you have installed. This view and its corresponding tab only appears if you have installed one of the webEdition modules.

2.2.9 Validation view (from Version 3.2)

Beginning in webEdition Version 3.2, the Preferences dialogue includes a *Validation* from which you can enter the *Validation* view.

The *Validation* view offers tools that are designed to assist you in the creation and maintenance of accessible or “barrier-free” Web sites.

Figure 14 Validation preferences



- *Default value for the attribute xml in we:Tags:* You can set the attribute `xml=true` globally for all tags (instead of having to do it for every tag). This command makes it possible to create valid XHTML-code.
- *XHTML debugging:* If you activate the checkbox, every we:tag will be checked for validity before output.

Note: The debugging tool requires resources from your server and can affect performance of your site. Activate the debugging feature only during the testing of your site.

- *Notification of invalid attributes:* Activate this checkbox during testing to let the system display error messages either in an error log, a JavaScript alert box or in a text file.

2.2.10 The System tab (from Version 3.4)

In Version 3.4, a new Tab, System, has been added to the preferences.

Figure 15 System tab

System

Max Upload Size displaying in hints: (in MByte, 0=automatic)

Access rights for new directories: (default is 755)

Type of database connections:

HTTP authentication: ☐ Server uses HTTP authentication in the webEdition directory

User name:

Password:

Thumbnail directory:

The areas *Max Upload Size displaying in hints*, *Type of database connections*, *HTTP authentication* and *Thumbnail directory* are taken off the *Advanced* tab to improve the clarity. You can now set the *Access rights for new directories*. The default value is 755. For more information about access permissions in Unix file systems, please ask your system administrator.

Note: The permissions set in the *Systems* view only apply to newly created directories, not to directories already existing!

2.2.11 System settings for pageLogger

From Version 3.4.0.8 on, the *pageLogger* area has been added to the *System* tab: *pageLogger-directory* (see Figure 16). Please select here the directory, where pageLogger is installed.

Figure 16 pageLogger-directory in system tab

System

Maximale Upload Größe in Hinweistexten: (in MByte, 0=automatisch)

Zugriffsrechte für neue Verzeichnisse: (Standard ist 755)

Art der Datenbankverbindungen:

HTTP Authentifizierung: ☐ Server verwendet HTTP Authentifizierung im webEdition Verzeichnis

Benutzername:

Kennwort:

Verzeichnis für Miniaturansichten:

pageLogger-Verzeichnis:

As soon as the pageLogger directory is set here correctly, you are able to start pageLogger simply by clicking on *Modules > pageLogger*. Please note, that you have to restart webEdition for the changes to take effect.

Note: For the *Single Login* feature to work correctly, a pageLogger user with the same name as the webEdition user has to be established. Furthermore, the user has to be marked as a *webEdition user* in the user preferences of *pageLogger*! For further information about webEdition users in pageLogger please consult the pageLogger documentation.

2.2.11.1 adding pageLogger to webEdition pages

To make the integration of pageLogger in webEdition-pages as easy as possible, from webEdition Version 3.4.0.8 on, the new Tag `<we:pageLogger>` was created. This tag gives you the opportunity, besides using the code generated by the pageLogger Code Wizard, to easily integrate pageLogger into existing webEdition projects.

Further informationen about `<we:pageLogger>` can be found in the *webEdition Tag Reference* and the *pageLogger userguide*.

2.3 The webEdition menu structure

2.3.1 The *File* menu

The *File* drop-down menu has the following items (see Figure 17).

Figure 17 The *File* menu



- *New*. This item allows you to create a new webEdition page, to load an image, to create other documents (HTML page, Flash movie, Quicktime movie, JavaScript, CSS style sheet, and plain text documents, and others such as *.doc, *.pdf, *.zip, and

*.txt files) or a new template (see Figure 18). Furthermore, you can create new directories in both explorer menu views—Documents and Templates.

Figure 18 The *File* > *New* sub menu



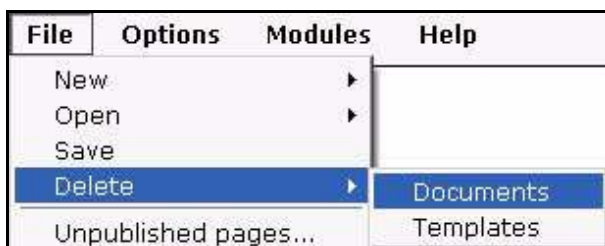
- *Open*. This command allows you to open documents (webEdition pages, images, etc.) and templates (see Figure 19). If you have installed the Database/Object Module, this menu item also allows you to open objects and object classes.

Figure 19 The *File* > *Open* sub menu



- *Save*. This item allows you to save the file that you currently have open in the edit view.
- *Delete*. This item allows you to delete a document or a template (as well as objects and classes if you have installed the Database/Object Module; see Figure 20).

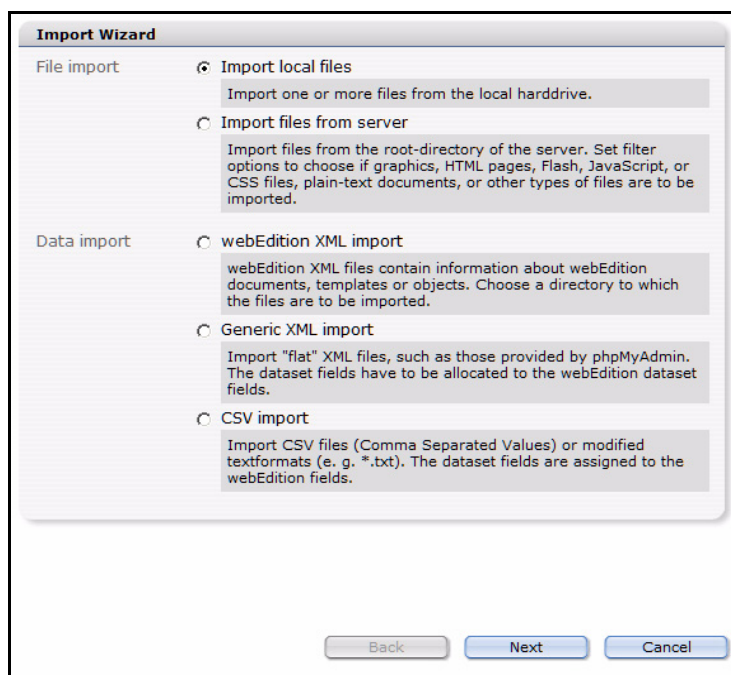
Figure 20 The *File* > *Delete* sub menu



- *Unpublished pages*. This item opens a new window in which all unpublished pages are listed in a tabular format.
- *Unpublished objects*. If you have installed the Database/Object Module, you can use this command to display a tabular overview of all unpublished pages.

- *Import/Export.* webEdition currently offers the following import functions (see Figure 21, "Import Wizard" on page 53):
 - *File import.* There are two file import options:
 - *Import local files*
 - *Import files from server*
 - *Data import.* There are two data import options:
 - *Generic XML Import.* Use this generic extensible markup language (XML) import function to import flat XML files.
 - *CSV Import.* Use the comma separated values (CSV) import function to import csv files or modified text formats.

Figure 21 Import Wizard

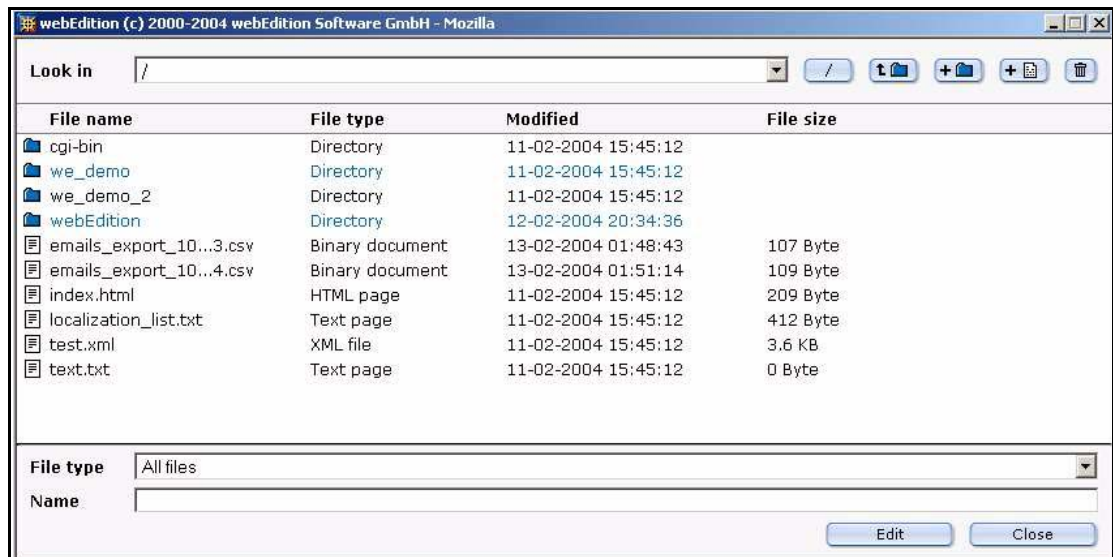


- *Rebuild.* This command allows you to re-write either all documents or those documents that meet specified criteria. The rebuild process is necessary to keep the links consistent whenever the linking structure changes, or if you have pages that are not generated dynamically and if you have edited a page which includes elements and/or sections using the `we:include` tag. See Section 3.2.9, "Rebuilding static and dynamic Web pages" on page 74.
- *Backup.* The backup function has two parts:
 - The *Create Backup* command allows you to create a local backup of your host database. and/or to restore this image on your host.
 - The *Recover Backup* command allows you to restore your backup image on your host. For further details, see *The webEdition Installation, Update and Backup Procedures*.
- *Browse Server.* This command opens a file management window containing a complete overview of the root directory ("/") on your server. It displays all the

directories and files created in webEdition in blue letters. Any other directories and files are displayed in black letters.

The file manager helps you to work with and manage your files and directories. After selecting a file or directory, you can add, move or delete the item(s) using the file manager by clicking one of the icons at the top-right of the screen. (see Figure 22).

Figure 22 The file manager



- *Quickstart*. Returns you to the *Quickstart* menu (see Section 2.1.2.1, "The Quickstart options" on page 41).
- *Quit*. Select this command to log out of webEdition.

2.3.2 The *Options* menu

The *Options* menu has the following items (see Figure 23, "The Options menu" on page 54):

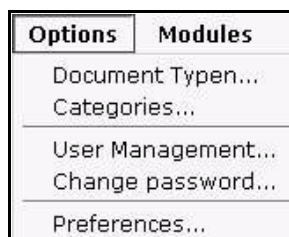


Figure 23 The *Options* menu

- *Document types*. This command allows you to create a new document type. The *Document types* feature allows you to group documents with similar characteristics, or to assign characteristics to a new document that are similar to existing documents. You can also select an existing document type and delete it or modify its properties, which might entail assigning a template to it or specifying default values. See Section 3.6.1, "Document types" on page 97.
- *Categories*. This command allows you to create a new category or to delete categories you no longer need. The *Categories* feature offers an alternate method of generating page summaries, and of organizing your documents. See Section 3.6.2, "Categories" on page 99.
- *Thumbnails*. Here you can do the settings for thumbnails.

- *Change user name/User management.* This command allows you to change your user name. If the User Management Module is installed, *User Management* appears in the menu. See Section 3.6.3, "Changing user name and/or password" on page 100.
- *Change password.* This item allows you to change your password. See Section 3.6.3, "Changing user name and/or password" on page 100.
- *Preferences.* Use this item to modify the default webEdition preferences. See Section 2.2, "Preferences" on page 42.

2.3.3 The *Modules* menu

The *Modules* menu lists all webEdition modules installed in your version of webEdition (see Figure 24, "The *Modules* menu" on page 55). You can open a module by clicking on the corresponding menu item.

Note: The *Modules* menu will vary depending on the modules you have installed.



Figure 24 The *Modules* menu

For further details about a specific webEdition module, see the supporting documentation at <http://www.webedition.de/english/downloads/Documentation.html>

2.3.4 The *Help* menu

The *Help* menu contains the following items (see Figure 25, "The *Help* menu" on page 55):



Figure 25 The *Help* menu

- The *Help* menu contains an extensive help program. You must be connected to the internet. The help program is on our server.
- *Update.* There are three items:
 - *Update.* Here you can check which version of webEdition you have installed. The version number appears at the top of the view. You can use the Search button to check if there is a newer available version. If so, you can update to a newer version using the online installer. In addition, all new modules are installed using this menu item.
 - *Module installation.*
 - *Log.*
- *Info.* This item contains information on webEdition, and the version you are using.

2.3.5 The explorer menu

The explorer menu appears on the left side of the webEdition main screen, and it displays the contents of your Web site as a series of folders and files. Adjacent to the explorer menu are either two or four vertical tabs, depending on whether or not you have installed the Database/Object Module (see Figure 26, "The explorer menu" on page 56). When you click on a vertical tab, you can view the corresponding editing view in the explorer menu:

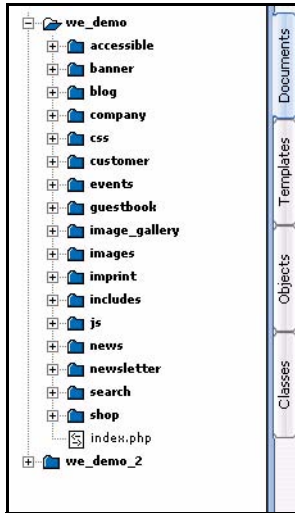


Figure 26 The explorer menu

- *Documents* tab. This editing view shows a list of the available documents (Web pages, style sheets, images, etc.) and the document directories
- *Templates* tab. This editing view shows all the templates
- *Objects* tab. This editing view (visible only if you have installed the Database/Object Module) shows a list of available objects
- *Classes* tab. This editing view (visible only if you have installed the Database/Object Module) shows a list of available object classes

Documents, templates or objects displayed in red in the explorer menu have been saved, but have not yet been published, while those displayed in black have been both saved and published. See also Section 3.2.2, "Saving, "unpublishing", and deleting documents" on page 70.

By clicking on one of the view icons, you can open, change or publish a desired file in edit mode. By double-clicking one of the entries in the *Documents* view, you will launch a new browser window showing you the document as it will be displayed online.

2.3.5.1 Identification numbers (IDs)

If you pass the mouse pointer over the icon of an individual document or template, a number appears below the explorer menu. The same number appears on the screen below your mouse pointer (see Figure 27).



Figure 27 webEdition ID numbers

IDs are unique numbers allocated to a document or a template. webEdition uses the ID to access the document internally. The ID allocated to a document is needed for some we:tags (such as we:a or we:url). The document ID is designed to make it easier for you

to link documents.

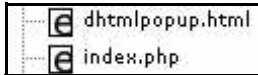
2.3.5.2 Explorer menu icons

The various file types used in and with webEdition are identified in the explorer menu by the distinctive icons:

Directories and sub directories are identified by folder icons:

Figure 28 directory icon

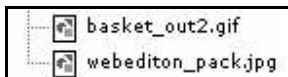
webEdition pages (.php and .html files) are identified by “e” icons:

Figure 29 webEdition page icon

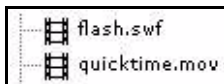
Templates, JavaScript, CSS (.tmpl, .js, .css files) appear thus:

Figure 30 Template icon

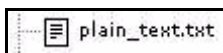
Images (.gif, .jpg, jpeg, .png files) appear thus:

Figure 31 Image icon

Movie files (.mov, .swf) appear thus:

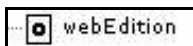
Figure 32 movie icon

Plain text (.txt) files appear thus:

Figure 33 Plain text icon

If you have installed the Database/Object Module, the following icons appear in the *Objects* and *Classes* views:

- objects

Figure 34 Objects icon

- object class icon

Figure 35 Object class icon

2.4 webEdition control elements

To the right of the drop-down menus there are the following navigation control elements:

Figure 36 webEdition navigation control elements



- *Home*. If you click on the symbol which looks like a house, the *seeMode start document* opens. You can define the *seeMode start document* in *Options > Preferences*.
- *Reload*. Click the icon adjacent to the Home icon to reload the Web site.
- *Back*. Click on the left-pointing arrow icon to navigate to the page opened last.
- *Forward*. Click on the right-pointing arrow icon to navigate to the next open page.

2.5 Viewing modes: standard and Super-Easy-Edit Mode

There are two viewing modes available in webEdition: normal mode and Super-Easy-Edit Mode (*seeMode*)

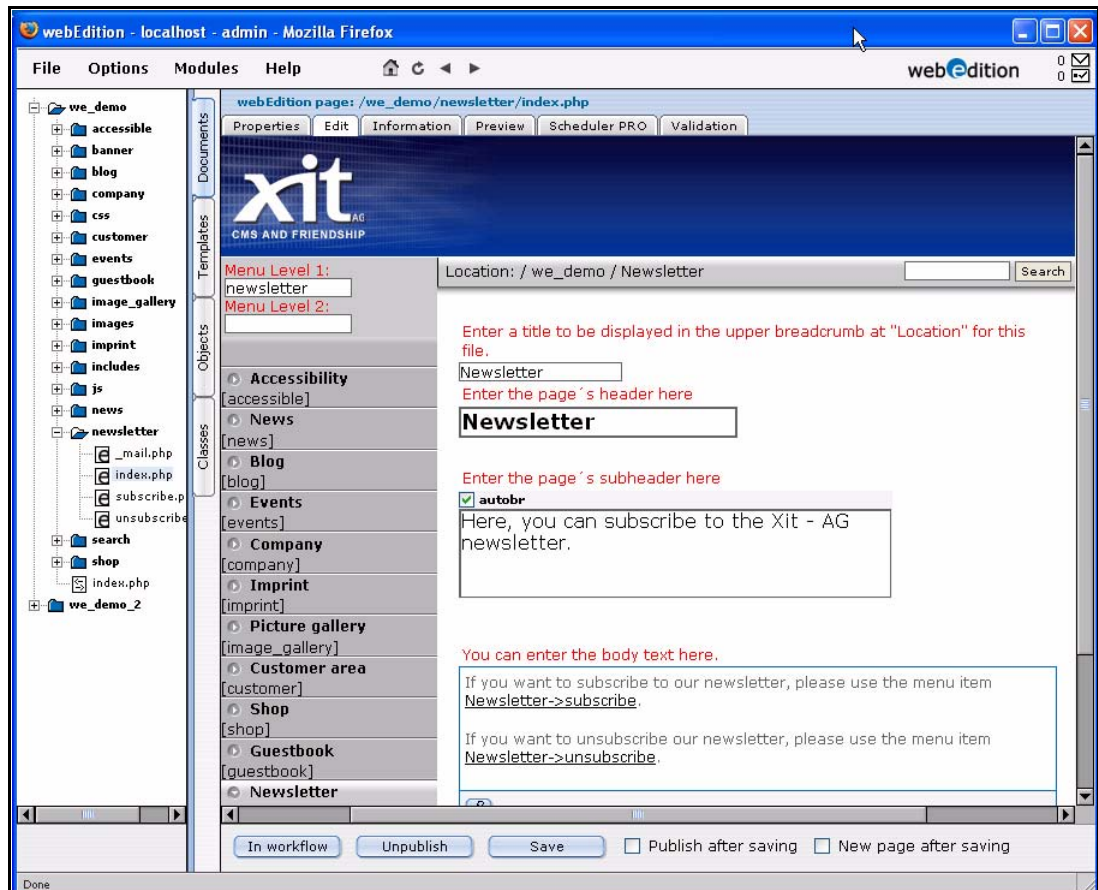
2.5.1 The editing screen in standard mode

The editing screen is where you can create, edit, preview your individual webEdition documents and templates. If you are an editor and you click *File > New > webEdition Page > Empty Page*, the *Documents* editing screen opens. Four tabs are visible, a fifth is visible in the document editing view if you have installed the Scheduler Pro Module (see Figure 37, "The webEdition Edit view (normal mode)" on page 59). Likewise, if you are an administrator and you click *File > New > Template*, the *Templates Edit* view opens. Each tab, when clicked, opens a specified view.

- *Properties*. This view allows you to assign all the necessary properties to the file such as name, directory, document type, etc.
- *Edit*. This view displays the *Edit* view, document you wish to edit in edit mode. You make all your entries to the page in this mode.
- *Information*. This view displays all relevant information on the current document.

- *Preview*. This view allows you to check how your page will actually appear in the browser.
- *Scheduler PRO*. If you have installed the Scheduler Pro Module, when you are working with a document, you can use this view to access the settings for the module.

Figure 37 The webEdition Edit view (normal mode)



The editing screens and the available views are different for documents and templates. Each will be discussed, in turn, in subsequent chapters.

2.5.2 The editing screen in Super-Easy-Edit Mode

In contrast to the normal editing mode, which serves the administration of the entire Web site, the seeMode is ideal for editing content.

The seeMode is characterized by simplified navigation and a removal of the more complex functions that are better suited to the skills of an administrator. The seeMode is designed for the simple maintenance of existing Web site content.

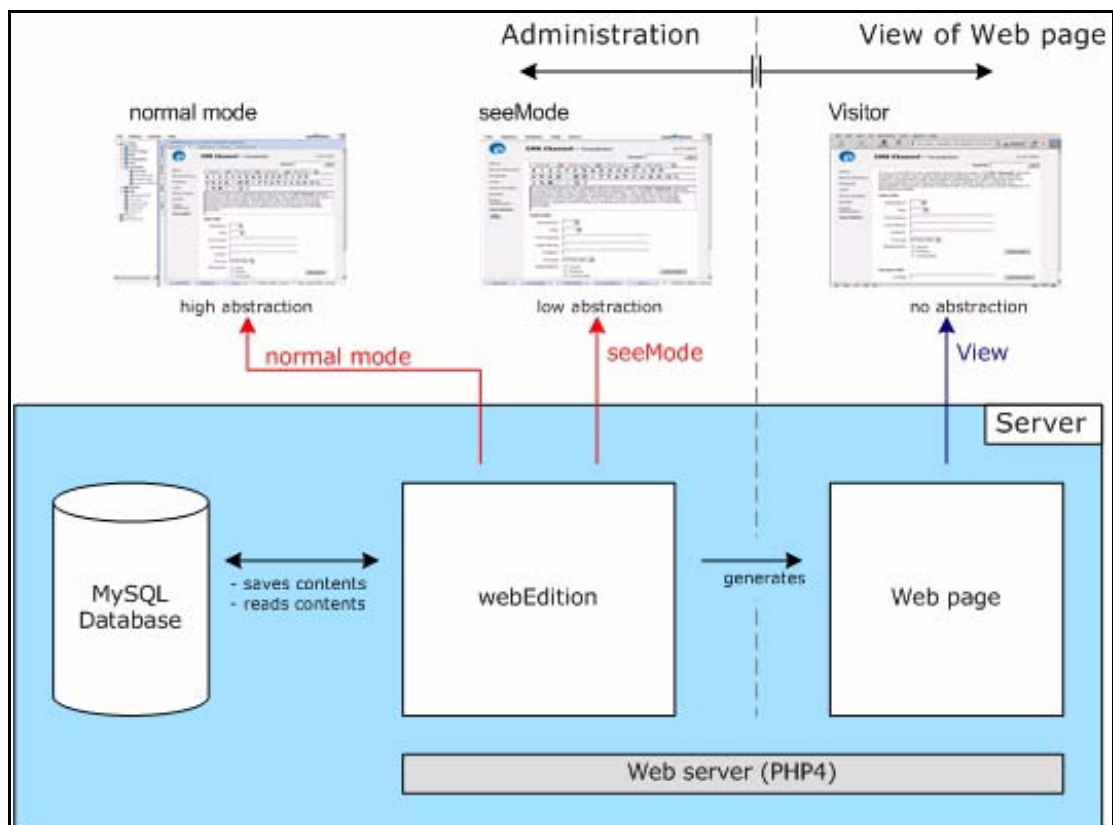
Note: The seeMode feature in webEdition 3.0 cannot be used with Web sites that use HTML frames.

When in Normal mode, an editor must select each of his/her documents from a file tree; in seeMode an editor can navigate to all the documents for a Web site using the navigation of the web page that they must edit. In contrast to working with a file tree,

which presupposes a certain understanding of where and how documents are stored on a Web server, the desired document can be accessed easily and directly. An editor using seeMode does not need to know how the documents for a Web site are distributed on the server; when an editor logs in, webEdition can be configured so that the Web page that they have to maintain automatically appears. The editor can navigate through the Web site and modify the contents of the associated pages using a WYSIWYG editor and then published the revised pages. An editor can perform all of the same tasks in seeMode as in normal mode, except template and class editing.

Figure 38 shows how the view of an editor, administrator and end visitor will perceive a Web page.

Figure 38 What editors, administrators and visitors see



The first time you log into webEdition in seeMode, you will see the following message (see Figure 39), asking whether you wish to choose a default web page which will open each time you log in to seeMode:

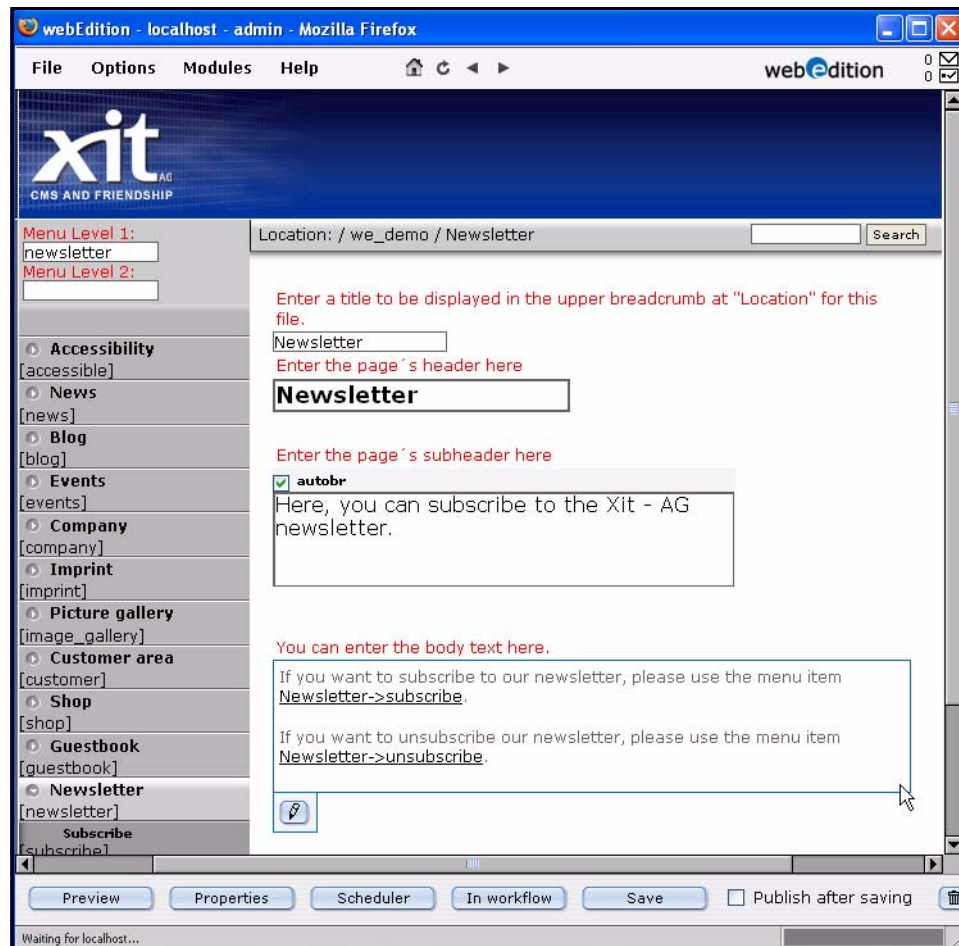
Figure 39 The *No start document* warning



If you click *OK*, the preferences screen opens in the *User interface* view. In the *seeMode start document* area you can choose a start document by clicking the *Select* button and browsing the server for a document.

Thereafter, every time you log into webEdition in seeMode, the page you have selected will automatically appear on screen. This page is your seeMode home page. See, for example, Figure 40.

Figure 40 The webEdition editing screen (seeMode)



2.5.2.1 seeMode user interface

The menu structure and functions for the seeMode are the same as what is described in Section 2.3, "The webEdition menu structure" on page 51, with the following exceptions pertaining to navigation and file creation:

2.5.2.1.1 explorer menu The file tree that one sees in Normal mode does not appear in seeMode. All navigation can be carried out using the links inherent in your seeMode start page. You do, nevertheless, have the option of opening files from the server by using the *File > Open* menu.

2.5.2.1.2 File menu All functions are available to the user. If you have installed the User Management Module, user activities can be restricted (see Section 2.5.2.1.4, "Interactions with the User Management Module" on page 62).

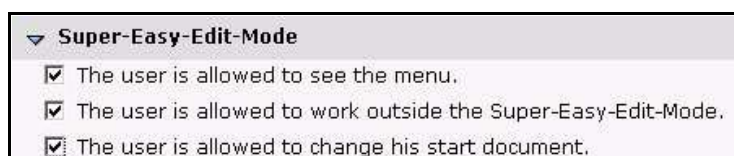
2.5.2.1.3 Home menu When you are editing your web pages in seeMode, you can click the *Home* menu to return to your designated seeMode start page.

For details on how to edit documents while using the seeMode, see Section 3.8, "Editing documents in seeMode" on page 113.

2.5.2.1.4 Interactions with the User Management Module The User Management Module gives administrators additional flexibility in designating what a user will see when he/she logs into webEdition using seeMode. There are three control features for seeMode, which are accessed from the User Management *Permissions* view (see Figure 41):

- *The user is allowed to see the menu.* If this checkbox is not activated, for a given user, that person will see only the *Quit* and *Home* menus. Hence the person will be limited only to editorial tasks associated with an existing document.
- *The user is allowed to work outside the seeMode.* Here an administrator can restrict access to files that were not created in webEdition.
- *The user is allowed to change his/her start document.* If this checkbox is not activated, the user will only be able to modify the seeMode start page (and its internally linked pages).

Figure 41 Permissions for the seeMode in the User Management Module



3 Working with documents – the role of the editor

The webEdition content management system differentiates between the role of the editor and the role of the administrator. Each role requires a different skill-set. Moreover, the tasks assigned to each role are governed by different webEdition user permissions.

This chapter describes the activities that are performed when working with webEdition documents. This role is normally carried out by a Web page editor. These tasks include:

- creating new documents
- saving/parking/deleting documents
- modifying/updating documents
- importing files
- working with other documents: graphical and non graphical files
- creating new document directories
- defining categories
- rebuilding static and dynamic Web pages
- changing user names and/or passwords
- editing preferences

By "documents", we mean all types of files that are used in the presentation of a Web page. Such files can include webEdition pages, normal HTML pages, cascading style sheets, JavaScript pages, images and Flash movies.

Note: This manual always refers to the sample pages supplied with the software. Sample pages can be accessed from the `we_demo` directory, found in the webEdition explorer menu.

3.1 The four views when working with documents in normal mode

In Chapter 2, we discussed how the editing screens and the available views are different depending on whether you are working with a document or a template. The following sub-sections describes each of these views as they pertain to documents.

3.1.1 The Documents Properties view

You use the *Properties* view to define the name, type, location, and ownership of your webEdition documents. The *Properties* view has the following areas: *Path*, *Document*, *Meta Tags* and (under the *More properties* button) *Categories*, *Owners* (see Figure 42).

Figure 42 The Documents Properties view

- *Path*. This area allows you to enter the name of the document, its extension and the directory in which it is to be saved. Select the directory by clicking the *Select* button and using the file manager. To avoid input errors, the directory cannot be entered by hand.

The extension determines how the server will react to the document. The extension for static pages is either .html or .htm, whereas the extension for dynamic pages is .php.

Note: If you allocate an .html extension to a dynamic document, it will not execute and the viewer of the document will be able to see the source code, unless your administrator has configured your server to have the PHP parser execute documents with an .html or .htm extension. If you are using other script languages such as ASP or JSP in your templates, always save pages as "static" pages and select the appropriate extension (for example .asp for ASP pages)

- *Document*. In the *Document* area you can select the document type and the template on which you wish to base the new page.

If you choose to select a document type, your selection will be limited to the template allocated to this document type. For additional information on document types, consult Section 3.6.1, "Document types" on page 97. If you do not select a document type, you will be able to use any of the available templates. The checkbox located at the bottom of the *Document* area allows you to determine if the page should be created dynamically. If you do not activate the checkbox, the page will be created statically. You can find more information on the difference between static

and dynamic pages in Section 3.2.9, "Rebuilding static and dynamic Web pages" on page 74.

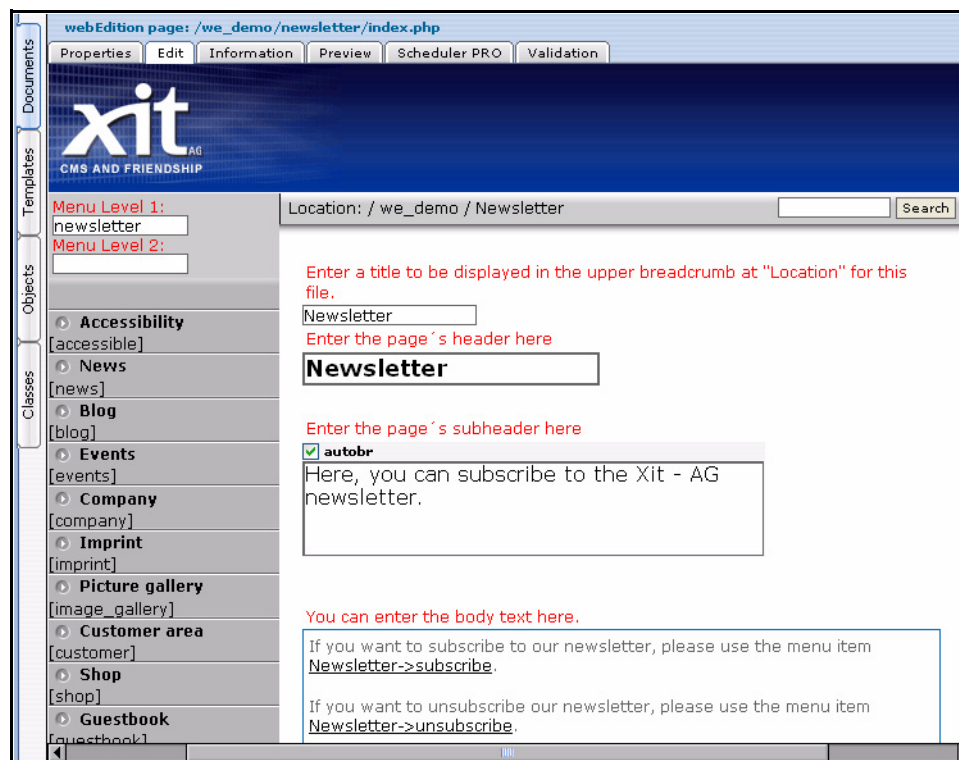
To make a document searchable, activate the *Is document searchable?* checkbox.

- **Meta Tags.** In the *Meta Tags* area, enter in the *Title* field the title you want to appear in the browser bar when the page is viewed by an end user. This is equivalent to an entry in the <title> HTML tag as long as the we:tag is in the template. In the *Description* field, enter the description of the Web page that you wish to be displayed by, for example, a search engine. This is equivalent to an entry in the <description> meta tag, as long as the we:tag is in the template. In the *Keywords* field, enter the keywords that characterize the content of the document. These words will be found by search engines and other such programs. This is equivalent to an entry in the meta tag <keywords> as long as the we:tag is in the template.
- **Category.** In the *Category* area, you can select the category to which you want your document to belong. To do so, click on the *Add* button to make a selection from the available categories. For additional information on categories, please consult Section 3.6.2, "Categories" on page 99.

3.1.2 The Documents Edit view

You use the *Edit* view to create or modify the content of your document by entering text, creating link lists, adding images, etc. (see Figure 37, "The webEdition Edit view (normal mode)" on page 59). With the exception of the areas that still have to be edited, the layout you see in the *Edit* view shows how this page will look on your Web site. The areas in which you can work appear as entry fields and are pre-defined by the template(s) created by your webEdition administrator. (More information on how this is done can be found in Section 6, "The role of the administrator – creating templates".)

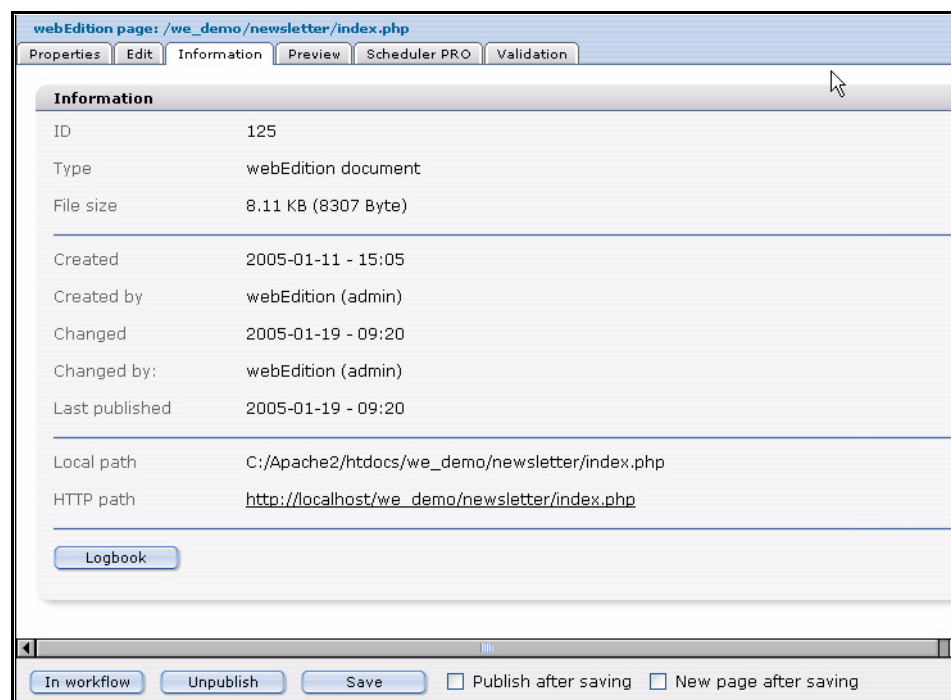
Figure 43 The Documents Edit view



3.1.3 The *Documents Information* view

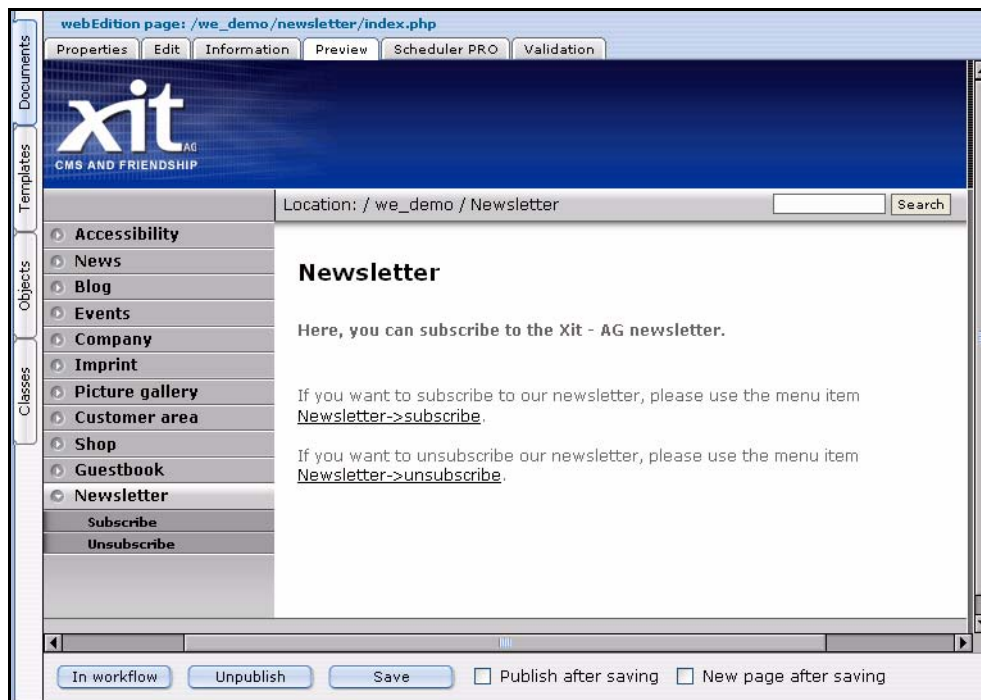
The *Information* view provides you with read-only information about your document, such as the file type, the size of the file, the date created, the date when it was last modified and when it was last published. This view also provides information on the local host path where the file has been saved and the HTTP path (the URL) where the page can be accessed online (see Figure 44).

Figure 44 The *Documents Information* view



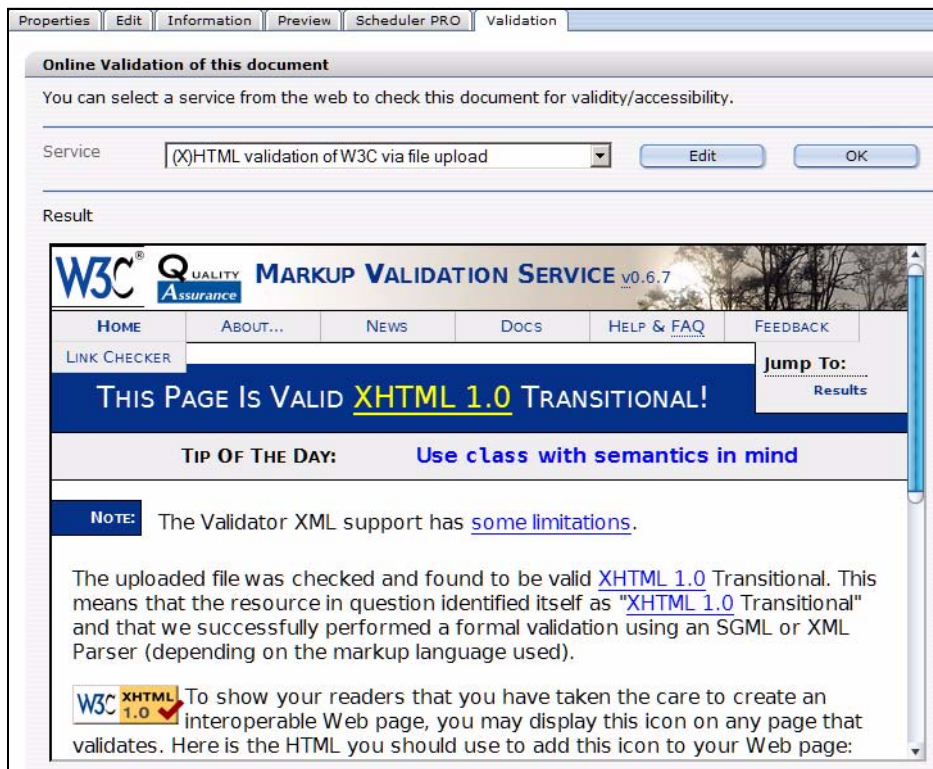
3.1.4 The *Documents Preview* view

You can use the *Preview* view to display how your finished page will look online when viewed in a browser. Use this feature to check the contents of the page before saving or publishing it (see Figure 45).

Figure 45 The *Documents Preview* view

3.1.5 The *Documents Validation* view

Click on the *Validation* Tab to access the validation view.

Figure 46 The *Documents Validation* view

Note: This feature is only available beginning in Version 3.2.

On the Internet there are public services intended to help you to verify the validity of your code and the accessibility of your web page. Beginning in Version 3.2, webEdition includes the *Validation* view so you can validate your webEdition documents for barrier-free compliancy from within the CMS system either via URL transfer or file upload. The response of the service is displayed unmodified in webEdition (see Figure 46 on page 67).

To have your page checked by one of the preset services, select the service from the *Service* dropdown menu and click *OK*. In Figure 46, you can see the response for a successful validation according to the rules of the World Wide Web Consortium (W3C).

You can add other services by clicking on the *Edit* button and then adding a *new service* (see Figure 47).

Figure 47 Adding a new service

Adjust validation service

Existing services: Bobby, **New service**

Category: (X)HTML

Name of the service: New service

Host: example.com

Path: /path

Contenttype: text/html
Feature for the target server to determine the type of the submitted file (text/html or text/css)

Extensions: .html
Insert all extensions which should be available for this service. (.html,.css)

Method: get

Submit via: URL transfer

Name of variable: varname
Insert name of filename of file/url

Additional Parameters:
optional: var1=wert1&var2=wert2&...

Active: true
Here you can hide a service temporary.

You can subscribe to additional services such as:

- Validome (<http://www.validome.org>)
- Accessibility Bobby (<http://bobby.watchfire.com>)
- Cynthia Says (<http://www.contentquality.com/>)
- Checky (<http://checky.sourceforge.net/>) offers a list of validation services.

3.2 Working with webEdition pages

3.2.1 Creating a new webEdition document

Use the following procedure to create a new document.

Procedure 1 Creating a new document

At the webEdition main screen

- 1 Select **File > New > webEdition Page > Empty Page**.

The webEdition Page Properties view appears (see Figure 48).

Figure 48 Creating a new document: *Properties* view

- 2 In the *Path* area of the *Properties* view, enter a name for the new document in the *Filename* field.
- 3 In the *Path* area of the *Properties* view, choose a directory for the new document by clicking the *Select* button adjacent to the *Directory* field.
 - a Navigate through the directory menus until you find the location for the new file.
 - b Click on the name of the target directory, then click *OK*.
- 4 Click the *Save* button located at the bottom of the screen.

webEdition opens a read-only information box informing you that the new file has been successfully saved.

- 5 Click the *OK* button.

The newly created file is now listed in red letters in the explorer menu and you can now start editing your new document. When a page is displayed in red, this indicates that it has been saved but not yet published.

- 6 You have completed this procedure.

3.2.2 Saving, “unpublishing”, and deleting documents

After creating or modifying a document, you must save your files.

3.2.2.1 Saving and publishing a page

When working with a document, you can save a file while in any of the four views (*Property*, *Edit*, *Information*, *Preview*). webEdition differentiates between two situations: saving a new page and saving an existing page that has been changed.

- Saving a new page. You will be given the following options when saving a new page:
 - *Without publishing it.* If you click the *Save* button without activating any of the check boxes, the page will be saved in the system, but will not yet be published. It will appear in the explorer menu in red.
 - *Publishing it.* Before saving, activate *Publish after saving* and then click the *Save* button. The page will be saved and published at the same time so that it can be accessed from outside webEdition. Published pages appear in the explorer menu in black font.
 - If you wish to have a new, empty document of the same type available for editing immediately after saving a document, activate the *New page after saving* checkbox.
- Saving an existing page.
 - *Without publishing it.* If you change an existing page and want to save it without changing the published page, make sure that the *Publish after saving* checkbox is not activated, then click *Save*. The document will appear in the explorer menu in blue, indicating its new status in "temporary storage" without being published—the old page will remain published.
 - *Publishing it.* If you wish to publish an existing page immediately after changing it, or after having saved it temporarily, activate the *Publish after saving* checkbox and click on the *Save* button. If the page has been in temporary storage, the blue letters denoting its status will then become black in the explorer menu. You can check whether the page has been published by double-clicking on the document in the explorer menu. If it has been published, the new browser window will open displaying the page. If you try to double-click on a page that has not been published (red), a new browser window will appear informing you that the document has not been published.

If you wish to have a new, empty document of the same type available for editing immediately after saving a document, activate the *New page after saving* checkbox.

3.2.3 "Unpublishing" a file

If you wish to “unpublish” (or “park”) a published page without delete it, you can use the *Unpublish* function to place the file in temporary storage. Click on the page in the explorer menu to bring up the page in *Edit* mode. Instead of clicking *Save*, click *Unpublish*. The page will no longer be live and will appear in red letters in the explorer

menu. If you wish to re-publish this page, just activate the *Publish after saving* checkbox and click the *Save* button.

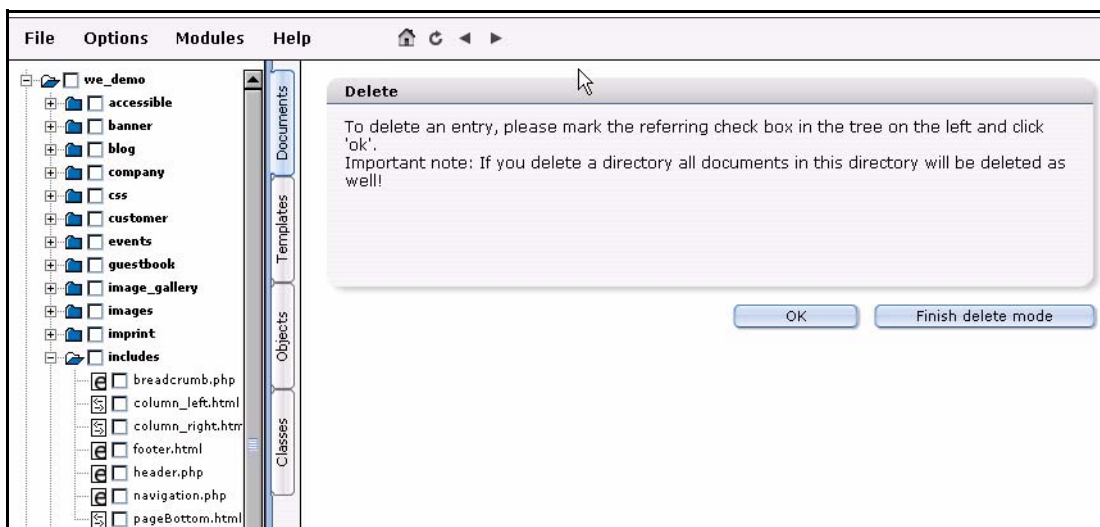
Note: If a document has already been published, you can only change whether it is generated statically or dynamically by unpublishing it, making the change and re-publishing it.

3.2.4 Deleting documents, templates, objects, or classes

In this section, by way of example, we describe the deletion process for a document. To delete a template, object, or class, you proceed in a manner similar to the steps described here.

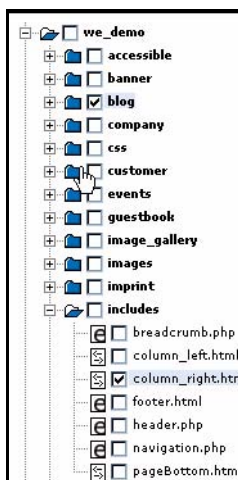
You can delete a document by clicking *File > Delete > Documents* (see Figure 49).

Figure 49 Deleting a document

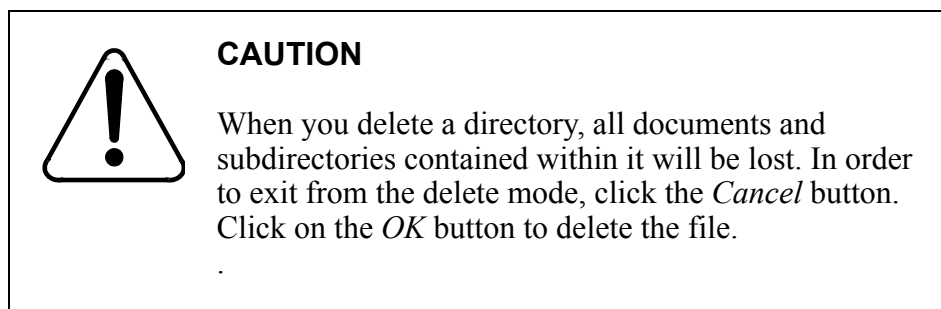


A checkbox appears beside each document and directory in the explorer menu (see Figure 50).

Figure 50 Marking files for deletion



Activate all of the checkboxes for the entries that you would like to delete.



3.2.5 Overview of all unpublished pages

You can access an overview of all unpublished pages or objects, in two ways:

- After logging in to webEdition, you can go directly there by clicking on the *Unpublished pages* (or *Unpublished objects*) button on the *Quickstart* screen (see Figure 51).

Figure 51 Quickstart-unpublished pages



- You can also select *File > Unpublished pages* (or *Unpublished objects*) from the *File* drop-down menu on the webEdition main screen (see Figure 52).

Figure 52 Accessing unpublished pages from the File menu




On this page you can view a table with all of the unpublished pages or objects that exist in the system (see Figure 53, "Table of unpublished pages" on page 73). The following information is displayed about the pages or objects:

- *Path*. Where in the system is the document/object?
- *Author*. Who is the creator of the document/object?
- *Created*. When was the document /object created?
- *Changed by*. Who had modified the document /object in the course of the workflow?
- *Changed*. When was the change made?

- *Last published.* When was the document /object last published?
- *Workflow step.* Where in the workflow is the document /object currently found? (This column exists only if the Workflow Module is installed.)

If you click on a criterion (that is, a value found underlined in the header row of the table), the table will sort the output according to the selected criterion. If you click on the actual path of a document /object, the system will take you directly to the unpublished document /object.

Figure 53 Table of unpublished pages

<u>Path</u>	<u>Creator</u>	<u>Created</u>	<u>Changed by</u>	<u>Changed</u>	<u>Last published</u>	<u>Workflow step</u>
/we_demo/news/news_holiday.html	-	2001-09-27 - 19:27	dan	2004-02-12 - 14:23	2004-02-11 - 15:57	1 of 2 
/we_demo/newsletter/index.php	dan	2003-07-20 - 19:27	dan	2003-08-03 - 15:40	-	-
/we_demo/dhtmlpopup.html	-	2002-05-10 - 19:37	-	2002-05-22 - 17:53	-	-

Back
1-3 From 3
Next

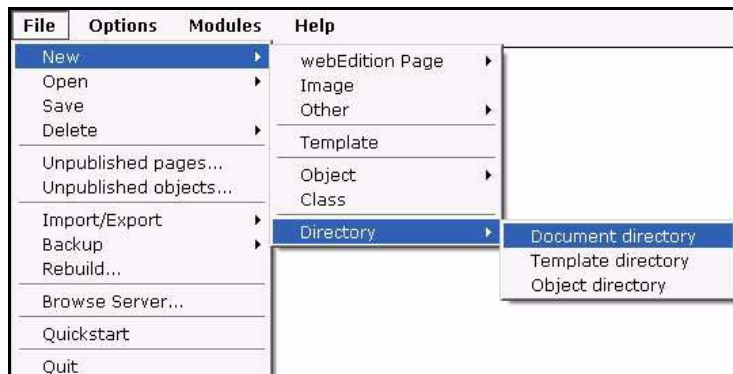
3.2.6 Modifying and updating a document

If you want to modify an existing document, select *File > Open > Document* from the *File* menu on the webEdition main screen, or single-click the icon in the explorer menu that represents the document you wish to change. (If you double-click an item, a new browser window opens, displaying the page.) Go to the *Edit* view and enter the new/updated text. You can view the changes in the *Preview* view. If everything is correct, save (and/or publish) the document.

3.2.7 Creating a new document directory

You can create a new directory within webEdition by selecting *File > New > Directory > Document directory* (see Figure 54). The new directory will be saved in the database and will therefore be displayed in the webEdition explorer menu. Any directory created on the server without using webEdition will not be displayed in the webEdition explorer menu. For more information about the *Browse Server* feature, see page 53.

Figure 54 Creating a document directory



3.2.8 Copying the contents of one directory to another

All the contents of a webEdition directory (including sub directories) can be copied to your currently active directory in one step. While in the *Documents* view, if you click

on a folder in the explorer menu, the Document Directory *Properties* view opens (see Figure 55):

Figure 55 Directory *Properties* view



In the *Copy directory* area, click on *Select*. A browser opens from which you can choose the directory whose contents are to be copied to the current one.

3.2.9 Rebuilding static and dynamic Web pages

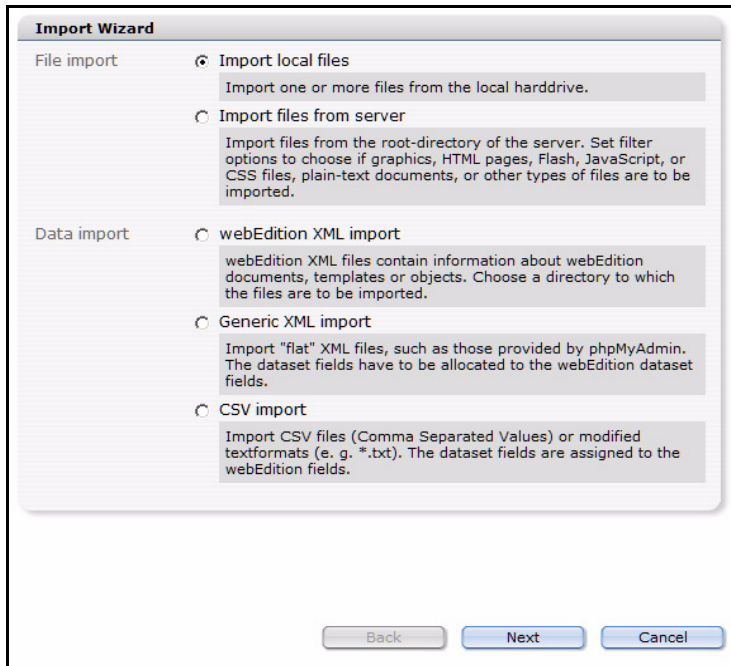
After making substantial changes to a static Web page, you must synchronize the content of your database with the content of the directories on your Web server. When you use the rebuild feature, the new contents or new features in the webEdition interface will be regenerated and then made visible to visitors to your site. You can regenerate either your entire Web page or only sections of it.

You can rebuild web pages using the *File > Rebuild...* command. Detailed instructions regarding how to use this feature are found in *The webEdition Installation, Update and Backup Procedures*.

3.3 Using the Import feature

webEdition allows you to import different types of files and data, and it offers an Import Wizard to help you with such actions (see Figure 56). The Import Wizard has two parts:

- *File import.* You can import files from two locations:
 - from your local hard drive
 - from your server
- *Data import.* You can import the following data files
 - generic XML files
 - CSV files

Figure 56 The Import Wizard

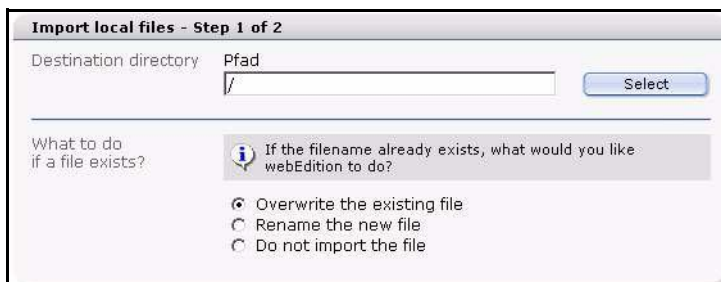
The following sub sections describe procedures for importing files into webEdition.

3.3.1 Importing local files

Procedure 2 Importing local files

In the webEdition main screen

- 1 Open the Import Wizard by clicking *File > Import/Export > Import*.
The Import Wizard opens.
- 2 Activate the *Import local files* radio button.
- 3 Click the *Next* button.
The Import local files window opens (see Figure 57).
- 4 Choose a destination directory by clicking the *Select* button adjacent to the *Path* field.
- 5 Instruct webEdition on what to do if the file name exists, then click the *Next* button

Figure 57 Importing local files

- 6 Choose a file (or files) from your local directory by clicking on the *Browse* button, then click *Next*.

A progress bar appears at the bottom of the screen to tell you that upload is in progress. When the import has completed, the system will tell you the outcome of the action. Click OK.

- 7 You have completed this procedure.

3.3.2 Importing files from your server

Procedure 3 Importing files from your server

In the webEdition main screen

- 1 Open the Import Wizard by clicking *File > Import/Export > Import*.

The Import Wizard opens.

- 2 Activate the *Import files from server* radio button.

- 3 Click the *Next* button.

The Site Import window opens (see Figure 58).

- 4 In the *Directories* area, choose a source and destination directory by clicking the *Select* buttons.

- 5 Use the checkbox in the *Import* area to indicate the type of file you wish to import.

- 6 From the two select boxes in the *Limits* area, choose the depth and maximum file size for the import.

The *Depth* select box allows you choose the number of recursive directories that are to be imported. For example, if you have the following directory structure `/news/images/gifs`, and you import files from the *news* directory with *depth* = 0, webEdition will only import files from the *news* directory. Files from "images" will not be imported. If you set the depth to *depth* = 1, webEdition will also copy files from the *images* directory. If you set the depth to *depth* = 2, files from the *gifs* directory will be imported.

- 7 Instruct webEdition on what to do if the file name exists, then click the *Next* button.

Figure 58 Importing files from a server

Site import

Directories

Source directory

Destination directory

Import

☒ Images (.gif .jpg .png) ☒ JavaScript files

☒ HTML pages ☒ CSS files

☒ Flash movies ☒ Plain text documents

☒ Quicktime movies ☒ Other files

Limits

Depth Maximum file size in MB

What to do if a file exists?

☒ If the filename already exists, what would you like webEdition to do?

☒ Overwrite the existing file

☐ Rename the new file

☐ Do not import the file

A progress bar appears at the bottom of the screen to tell you that upload is in progress. When the import has completed, the system will tell you the outcome of the action. Click OK.

- 8 You have completed this procedure.

3.3.3 Importing generic XML data

Procedure 4 Importing generic XML data

In the webEdition main screen

- 1 Open the Import Wizard by clicking *File > Import/Export > Import*.
The Import Wizard opens.
- 2 Activate the *Generic XML Import* radio button.
- 3 Click the *Next* button.
The Generic XML Import window opens (see Figure 59).
- 4 In the *importing* area, choose a source file by clicking the *Select* button.
- 5 Use the radio buttons to select whether the import is a document or object.
 - a If you choose *documents*, select the document type, template, target directory, extension and category for the import.
 - b If you choose *objects*, select the object class and category for the import.
- 6 Click the *Next* button.

Figure 59 Generic XML Import

A progress bar appears at the bottom of the screen to tell you that upload is in progress. When the import has completed, the system will tell you the outcome of the action. Click OK.

- 7 You have completed this procedure.

3.3.4 Importing CSV files

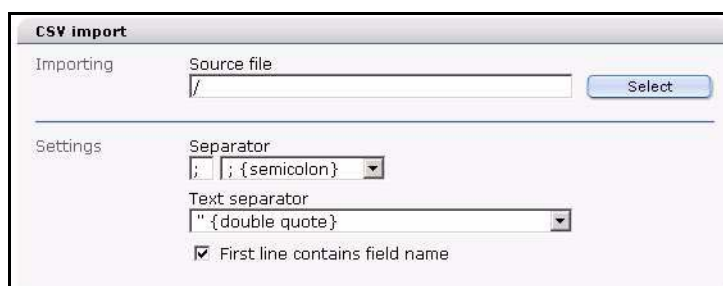
Procedure 5 Importing CSV files

In the webEdition main screen

- 1 Open the Import Wizard by clicking *File > Import/Export > Import*.
The Import Wizard opens.
- 2 Activate the *CSV import* radio button.

- 3 Click the *Next* button.
The CSV Import window opens (see Figure 60).
- 4 In the *importing* area, choose a source file by clicking the *Select* button.
- 5 In the *Settings* area, choose the type of separator and text separators used in your document, and indicate if the first line in the file uses a fieldname.
- 6 Click the *Next* button.

Figure 60 CSV Import



A progress bar appears at the bottom of the screen to tell you that upload is in progress. When the import has completed, the system will tell you the outcome of the action. Click OK.

- 7 You have completed this procedure.

3.3.5 webEdition XML import

This function is available to you from version 3.3 of webEdition; it serves exclusively the import of XML files which were generated with the webEdition Export module.

Procedure 6 webEdition XML import

In the webEdition main screen

- 1 Open the Import Wizard with *File > Import / Export > Import*
- 2 Activate *webEdition XML Import* radiobutton
- 3 Click on *Next*

The webEdition XML Import window opens (see Figure 61)

Figure 61 webEdition XML Import

webEdition XML import

Importing

☒ Load file from server

☐ Upload file from local hard disc

Because of restrictions within PHP, the file that you wish to upload cannot exceed 16MB.

Durchsuchen...

File collision

When you import a file to a folder that contains a file with the same name, a file name collision occurs. You can specify how the import wizard should handle the new and existing files.

☒ Replace

Delete the existing file and replace it with the new file.

☐ Rename

Assign a unique name to the new file. All links will be adjusted to the new filename.

☐ Skip

Skip the current file and leave both copies in their original locations.

Back Next Cancel

- 4 Select in the *Importing* area the file to be imported. It can be located on the server, as well as on your local hard disk
- 5 In the *File collision* area you determine how the system should behave, if already files of the same name should exist.
- 6 After you have dripped your choice, click on the *Next* button.

The Import options window opens (see Figure 62)

Figure 62 webEdition XML import options

Import options

Documents

☒ Import documents

Select the directory where the documents will be imported. If the option "Maintain ..."

Select

☒ Maintain paths

☐ Import templates

Objects

☐ Import objects

☐ Import classes

Doctype

☐ Import DocTypes

☐ Import categorys

Owners data

If the user do not exist, the option "Overwrite owners data" will be applied

☐ Restore owners data

☐ Overwrite owners data

Select

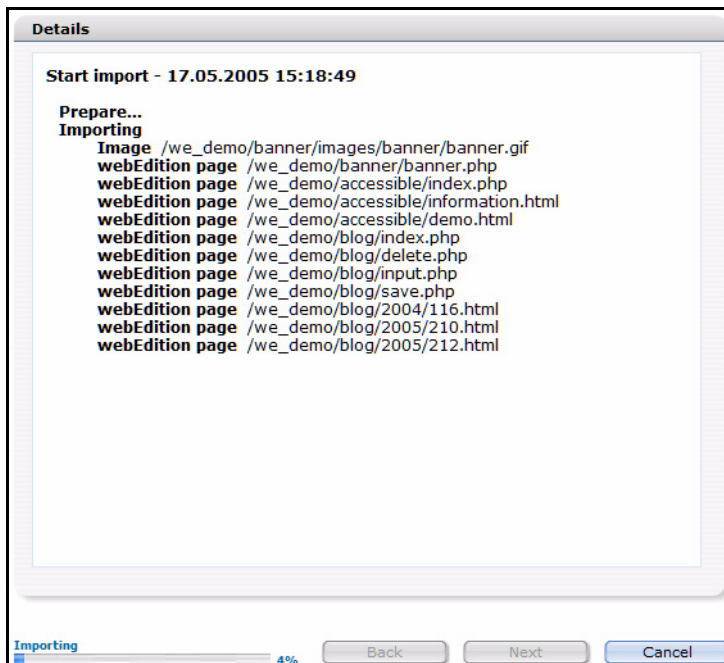
Back Next Cancel

- 7 In this window are, depending on your installed modules and the data contained in the exported file, several areas:
- *Documents / templates*: Activate these checkboxes, so the documents and/or templates from the file to be imported are imported. With activated check box you can determine with the *Select* button a destination directory
 - *Objects / classes*: Activate these check boxes to import objects and/or classes. This area is only displayed if the DB/OBJECT module is installed and objects or classes exist in the file to be imported.
 - *Doctype / category*: These check boxes must be activated if you want to import document types and/or categories
 - *Owners data*: Here you find the check boxes *Restore owner's data* and *Overwrite owner's data*. This area is only displayed if the user administration (PRO) is installed and user's data were coaccepted in the export.
 - Activate the check box *Restore owner's data*, around the user to whom the data "belonged" originally to assign the rights also on the target system. If the data User1 belonged, is also on the target system User1 of the owners. The user User1 must exist for it of course on the target system. Should this not be the case, the files are imported general-accessibly. This also applies to several users: If the data belongs to User1, User2 and User3, these rights on the target system are recovered, provided that these users also exist there.
 - Activate the check box *Overwrite owner's data* and select a new user, while you click on the *Select* button to associate a new owner to the imported files. If both check boxes are activated, the rights are associated in the imported data to the same-being users, provided that these exist. Should the users not exist in the webEdition instance in which is imported, the rights go over to the user selected under *Overwrite owner's data*.

Click on *Next*

The details window opens (see

Figure 63 Import details



- 8 Click after successful end of the import, whose progress you can read in the beam at the bottom on the left, on the *Cancel* button

Herewith the import of the webEdition XML data is concluded successfully

3.4 Working with graphical documents

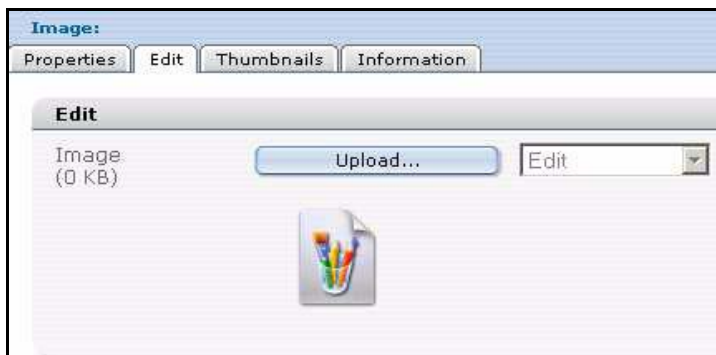
webEdition allows you to access not only webEdition pages, but also other graphical documents, which you can select from the *File > New > Image* drop-down menu.

webEdition differentiates between layout images, which are stored centrally on the host server in an image directory, and the images that vary depending on the accompanying content. The latter images are used by the editor and have to be inserted in the pages. Content images have to be uploaded before importing them to the webEdition database. If you wish, you can also import all the layout images to the database.

3.4.1 Uploading an image

Click *File > New > Image*. The *Upload image* dialog box opens in the *Edit* view (see Figure 64).

Figure 64 Uploading an image

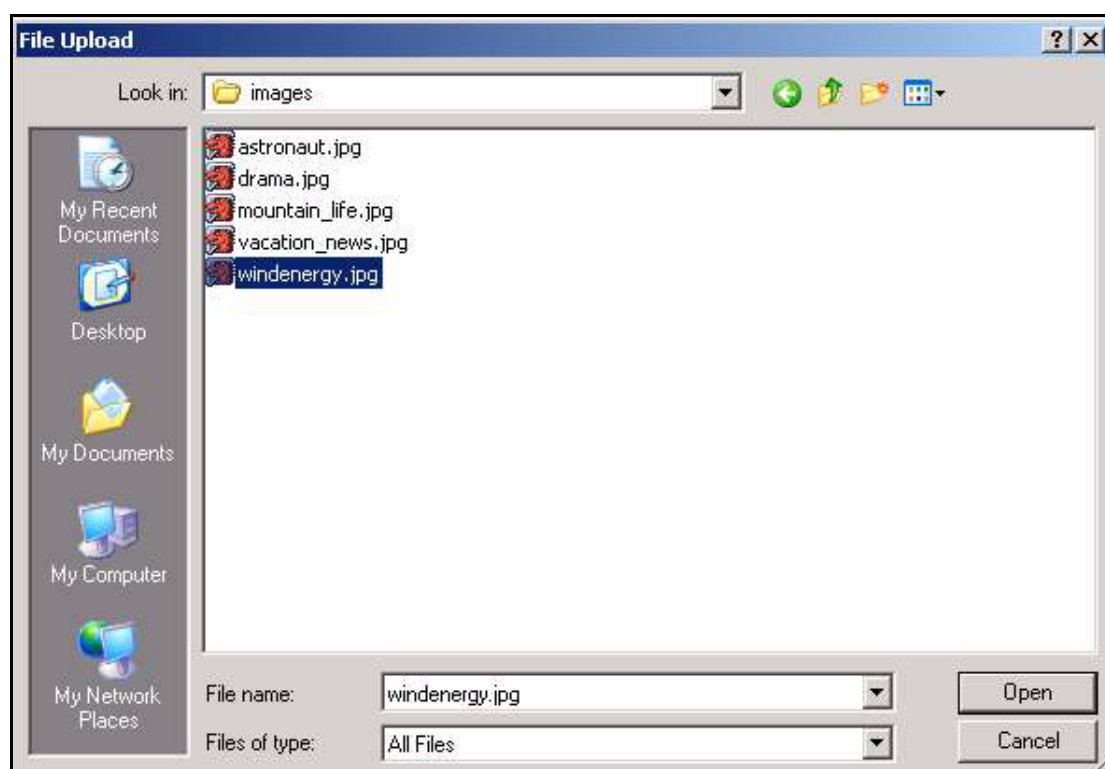


If you wish to upload an image from your hard drive to the webEdition database, click on the *Upload* button. A window appears in which you can browse your hard drive (see Figure 65).

Figure 65 Browsing your files for an image



Click *Browse*. You will see the select window, in which you can browse for an image on your computer (see Figure 66).

Figure 66 Selecting an image to upload

After you have found the image that you want, double-click it and it will appear in the search window. Click *Upload* in this window to display the selected image in the *Edit* view (see Figure 67).

Figure 67 Viewing an image in the *Edit* view

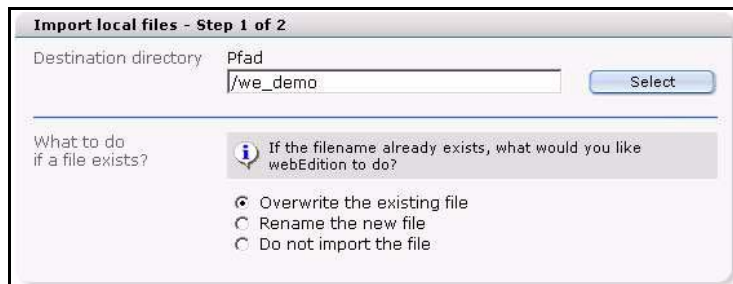
Use the *Properties* view to enter the name and directory in which you want to save the file. If you do not enter a new name, the image will be saved with its original name (default setting). If you clicked *Save*, you will be able to view the uploaded image in the directory you selected in the explorer menu and will be able to include it in webEdition pages. To learn how this is done, please consult Section 3.7.9, "Image field (<we:img>)" on page 113.

3.4.2 Importing more than one image

In webEdition you have the option of importing several images at once. Choose the item *File > Import/Export > Import....* An import file dialog box opens (see Figure 56, "The Import Wizard" on page 75).

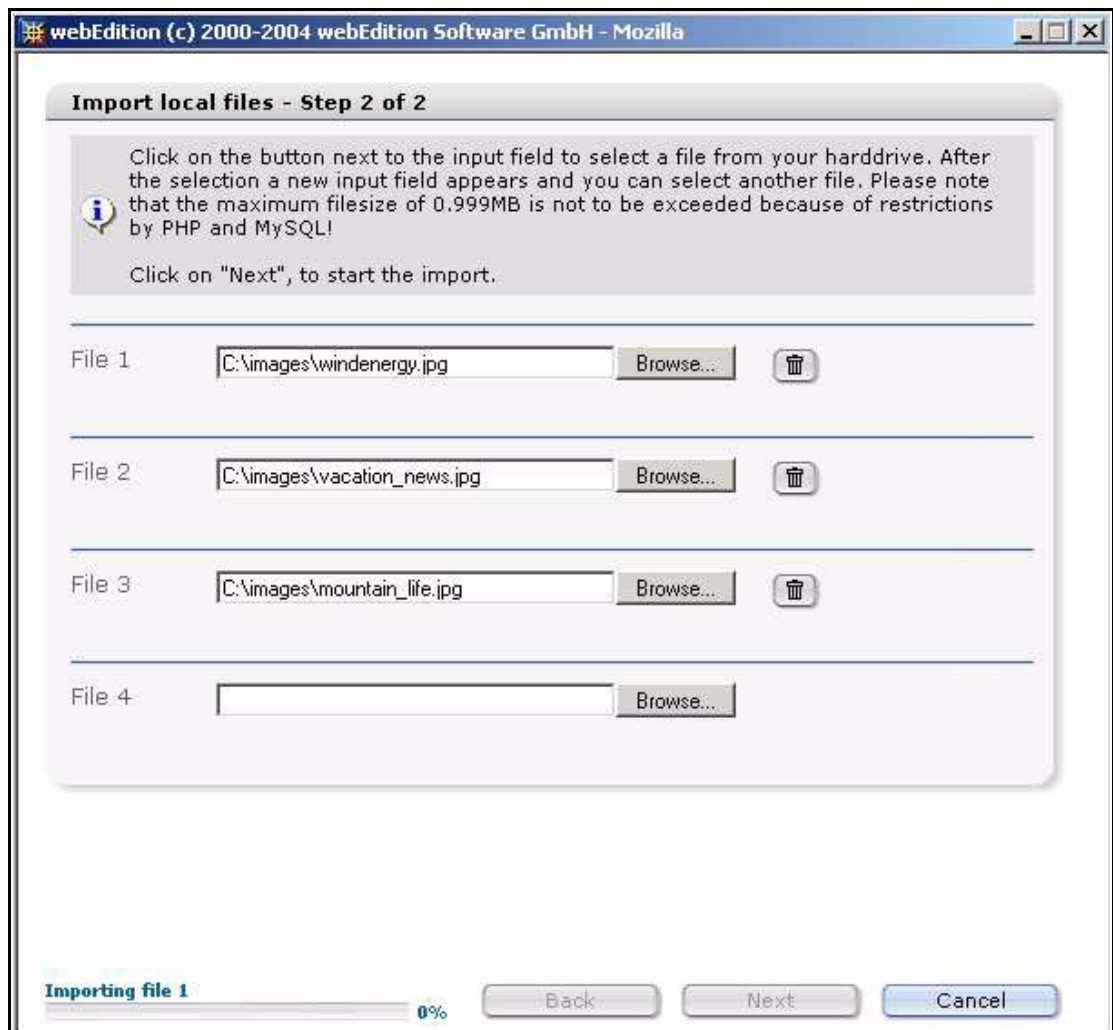
Activate the *Import local files* radio button, and click *Next*. The following *Import local files* screen opens (see Figure 68):

Figure 68 *Import local files - step 1 of 2*



Click on the *Select* button in the *Destination directory* area. The webEdition file manager opens, allowing you to choose the directory to which the images are to be imported. In this file manager, all directories within the root directory (/htdocs) of the Web server are displayed, therefore directories that are not managed with webEdition are also shown. The following window appears (see Figure 69):

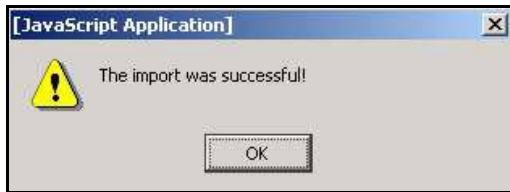
Figure 69 Import local files - step 2 of 2



webEdition asks you *What to do if a file exists?* in the lower area of the window. You must choose from one of three options. If, for example, you have modified an image and you wish to replace the old image, activate the *Overwrite the existing file* radio button to replace the old image. If the filename already exists in the target directory and you wish to rename the new file select *Rename the new file*. webEdition renames files by adding a number to the file name (for example, bg.gif becomes bg_0.gif). You can also instruct webEdition not to import a file if its file name already exists.

Click the *Next* button. Click the *Browse...* button to find an image on your local drive. You can repeat this action to import additional files.

Click *Next* to start the import. When the process is complete, the following message appears (see Figure 70):

Figure 70 Import confirmation screen

Click *OK* to complete the procedure.

3.4.3 The image *Properties* view

The *Properties* view allows you to define the display parameters for an image. There are three areas, *Path*, *Attributes*, and *Hyperlink*.

- *Path* area. The *Path* area allows you to give (or change) a file name, select a directory, or choose a file extension for your graphic.
- *Attributes* area. Use this area to modify the appearance of your image file (see Figure 71).

Figure 71 The *Properties* view, *Attributes* area

Attributes	Width	Height	Border
	Align	Hspace	VSpace
	Alt text		Name

The default settings are the values of the unchanged, original image.

- *Width*. Image width in pixels.
- *Height*. Image height in pixels.
- *Border*. You can have the browser draw a border around the image. The entry is calculated in pixels and specifies how thick the border will be
- *Align*. Entering left or right will cause the browser to align the image left or right. Accompanying text on the Web page is displayed to the left or right of the image and above and below it.
- *Hspace*. This field allows you to specify how far (to its right and left) the image is to be from other elements.
- *Vspace*. This field allows you to specify how far the image is to be from other elements above and below it.

- *Alt Text*. This is the text that is displayed while the image is loading.
- *Name*. Image name.
- *Hyperlink*. In this area the image can be linked to a URL (see Figure 72):

Figure 72 The *Properties* view, *Hyperlink* area

The screenshot shows the 'Hyperlink' section of a software interface. It contains four radio button options: 'No link' (selected), 'Extern', 'Intern', and 'Object'. Each option is followed by an 'href' label and a text input field. To the right of each 'href' field is a 'Select' button. Below these options is a 'Target' label followed by a dropdown menu. At the bottom, there is a 'Roll Over' checkbox, an 'href' label, a text input field, and a 'Select' button.

- *No link*. Image is not linked.
- *Extern*. External link, e.g. www.webEdition.de, can be selected using the select button.
- *Intern*. Internal link, can be selected using the select button.
- *Target*. Target denotes the location where the linked Web page should appear:
 - empty field, Web page will open in the same window or frame
 - `_blank`, a new browser window will open
 - `_top`, the page will be loaded in the same window on the uppermost level, even if it has been called up from a frame.
 - or you can specify the exact name of the frame or window in which the Web page will be displayed.
- *Roll Over*. If this checkbox is activated, you can choose a graphic using the select button which will appear to replace an image on a Web page as soon as one moves the mouse pointer over the original image. (This Web page feature is commonly called a roll-over or mouse-over effect)

3.4.4 The image *Edit* view

The image *Edit* view allows you to upload a new image from your local hard disk, or to overwrite an existing image. Click *File > New > Image* to open the *Image Edit* view (see Figure 74).

To select a file, click the *Upload* button, then click *Browse* to choose your file. (See also Figure 65, "Browsing your files for an image" on page 81 and Figure 66, "Selecting an image to upload" on page 82.)

Figure 73 Uploading a new image

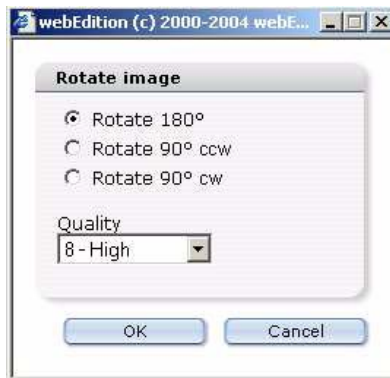
Once your new file has been uploaded, you can use the select box shown in Figure 74 to perform the following editing functions:

Figure 74 Editing an image

- *Resize*. Define the size of the image. If the image is a JPEG, you can also choose the kind of compression.

Figure 75 Resizing an image

- *Rotate image*. You can rotate the image here. If the image is a JPEG, you can also choose the kind of compression.

Figure 76 Rotating an image

- *Convert*. Use this command to change the format of the image. If the image is a JPEG, you can also choose the amount of file compression.

Figure 77 Converting and image

3.4.5 The images *Information* view

For a description of this view, see Section 3.1.3, "The Documents Information view" on page 66.

3.4.6 The images *Thumbnails* view: thumbnail formatting

webEdition allows you to create thumbnails from your existing images so that they can be displayed on your Web site in a picture gallery.

Creating thumbnails expends considerable processing resources, which can lead to latency. webEdition does not create thumbnails from your original images in real time each time your Web page is viewed by a visitor. To ensure that your thumbnails will load efficiently, you must pre-define the size and output format for your thumbnails using the *Options > Thumbnails* menu. By pre-defining your thumbnail formats, you can ensure that webEdition will automatically upload all of your thumbnails in the same size and format. You can pre-define, store and edit multiple thumbnail formats.

To create a new thumbnail format, click *Options > Thumbnails*. The *Thumbnails format* dialogue box opens. See Figure 78. Click the *Add* button. A dialog box opens and asks you to enter a name for your thumbnail format. Enter a unique and descriptive name and click *OK*. The name of your new format will appear in the text box on the *Thumbnails formats* dialog box.

Figure 78 Defining thumbnail formats

Below the text box shown in Figure 78 are the following areas that you can use to define the characteristics of each thumbnail format:

- *Name*. If you have defined more than one thumbnail format, the *Name* field indicates which format you are viewing. You can also use this field to change the name of an existing thumbnail format.
- *Properties*. Use the *Width* and *Height* fields to define the size of the thumbnails. If you activate *Keep aspect ratio*, the proportions of the image will be retained. If the aspect ratio of the original image is different than the defined aspect ratio, the width and/or the height of the created thumbnail will never be larger than one of the adjusted values.

Example

The original image has a width of 100 and a height of 80.

The defined values for the thumbnail are 50 (width and height) and *Keep aspect ratio* => The thumbnail will be 50 x 40.

The defined values for the thumbnail are 50 (width), 20 (height) and *Keep aspect ratio* => The thumbnail will be 25 x 20.

If you indicate only one of the two values or if you indicate 0 as a value, the missing value (and/or the value 0) is computed proportionally.

Example

The original image has a width of 100 and a height of 80.

The defined values for the thumbnail are 50 (width) and 0 (height) => The thumbnail will be 50 x 40.

If you activate *Maximize if required*, the thumbnail will be scaled up if the original image is smaller than the defined values for the thumbnail.

If you activate *Maximize if required* and the original image is smaller than the thumbnail, the original images will be used as thumbnail.

3.4.7 Associating an image with a thumbnail format

Click *File > New > Image*. The Image: Edit view opens.

Figure 79 Uploading a new image



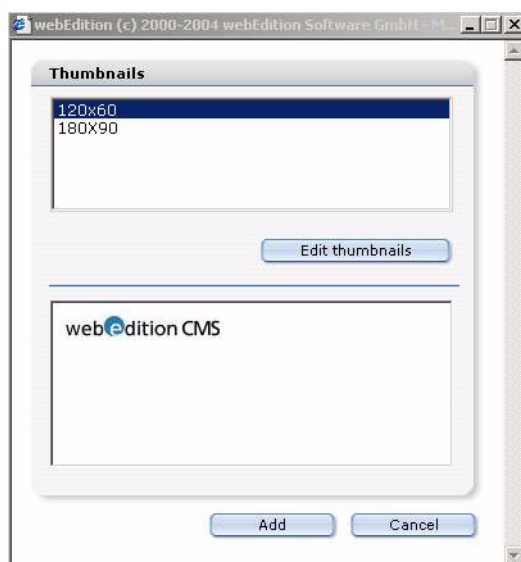
After uploading an image from your server or computer, click the *Thumbnails* tab. Click on the add image (the plus “+” icon).

Figure 80 Thumbnails tab



The formats that you pre-defined (see Section 3.4.6, "The images Thumbnails view: thumbnail formatting" on page 88) appear in a select box above the image you have uploaded. Select the format for the image and click *Add*.

Figure 81 Formatting a thumbnail



After formatting your image, it will appear in your *Thumbnails* list. (See Figure 82). Click the *Save* button to complete the formatting.

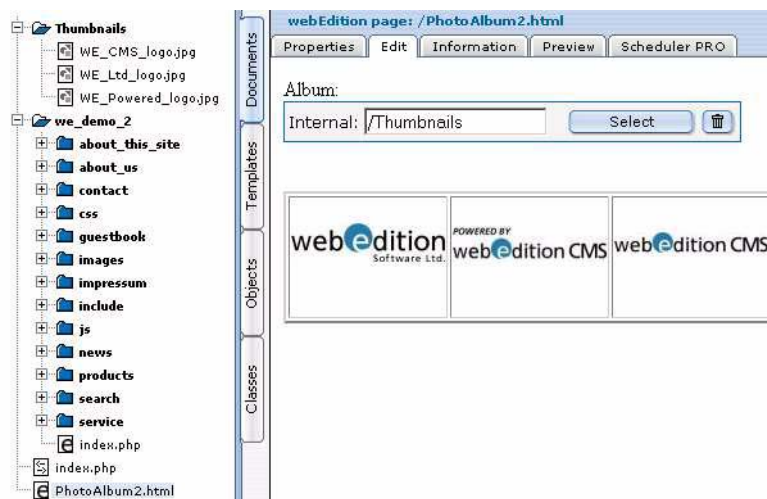
Figure 82 Thumbnails list

3.4.8 Displaying your photo album

Before you can upload images to a photo album, the template administrator must create a photo album template in which the thumbnails can be displayed. For details see Section 4.4.3, "Creating a photo album" on page 131.

Create a directory for your thumbnail image files. This directory will contain the images for your photo album. Move your image files into the designated directory (or directories). You can do so by clicking on your image and opening the *Properties* view. In the *Path* area, choose the directory for your image by clicking *Select* and browsing your directories.

Create a new document by clicking *File > New > webEdition Page > Empty page*. Give the file a name in the *Path* area. In the *Document* area, use the *Select* button to browse your system for the album template created by your template administrator. Select the template, then click *Save*. Click on the *Edit* tab. Use the *Album: Select* option to choose what photo album (directory) will be displayed (see Figure 83). You can preview your thumbnails by clicking the *Preview* tab. Save and publish your photo album.

Figure 83 Choosing a photo album directory

3.5 Working with non-graphical documents

webEdition allows you to work with a the following non-graphical document types, which you can select from the *File > New > Other* drop-down menu:

- HTML Page
- Flash movie
- Quicktime movie
- JavaScript
- CSS Stylesheet
- Other Files (*.doc, *.pdf, *.zip, *.txt)

3.5.1 Editing HTML pages

3.5.1.1 HTML document *Properties* view

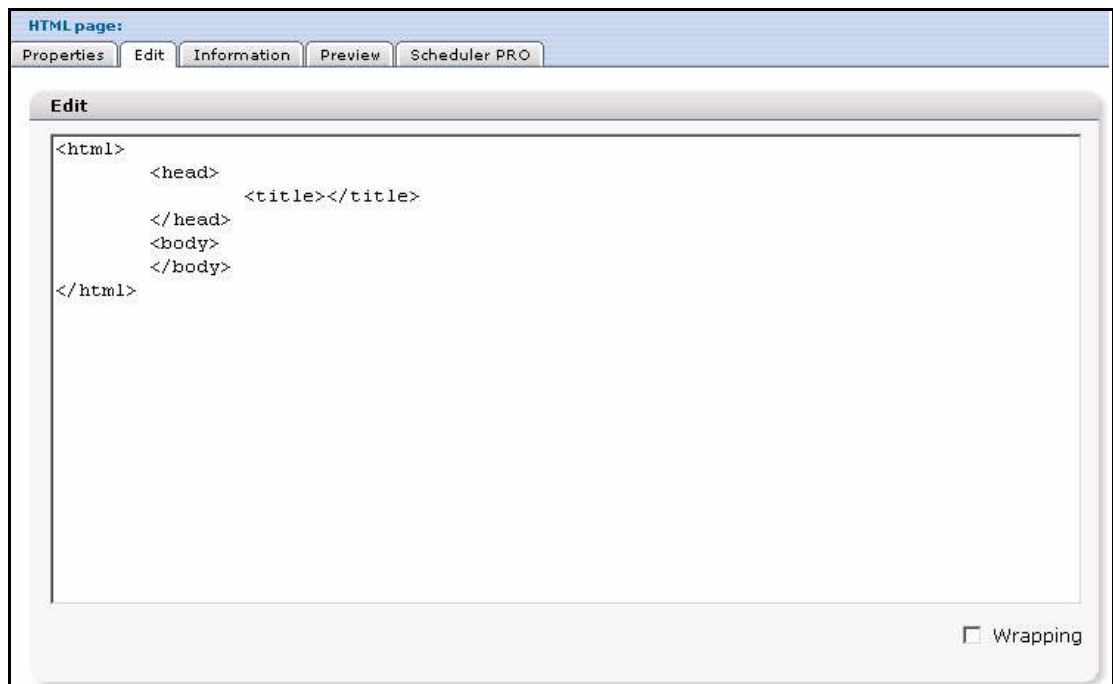
You can use the HTML *Properties* view to program your own HTML pages (see Figure 84). You cannot integrate webEdition features into this page. However, document types and categories can be selected in order to include these pages in summaries or in the "Find" feature. To make this possible, you must activate the *Is searchable?* check box. Since simple HTML pages do not have fields for a title or a description, you can have summary pages or search results pages display the path for the page or its content (either in its entirety or logically reduced to a certain number of characters) instead of displaying a field.

Figure 84 HTML *Properties* view

The screenshot shows the 'HTML page:' window with the 'Properties' tab selected. The 'Path' section includes 'Filename' (324), 'Extension' (.html), and 'Directory' (/). The 'Document' section has a 'Document type' dropdown set to '--none--' and an 'Is searchable?' checkbox. Below these are a 'Less properties' button, a 'Categories' text field, and 'Delete all' and 'Add' buttons. At the bottom, there is a 'Copy HTML page' button with a 'Select' button next to it.

3.5.1.2 HTML document *Edit* view

You can enter HTML code in the *Edit* view (see Figure 85). In this case, webEdition acts as a simple text editing program. You can also program PHP scripts, Active Server Pages (.asp) or Java Server Pages (.jsp) in this view. To do this, you also have to select the corresponding extension when setting the properties for the page.

Figure 85 Editing an HTML page

3.5.2 Using Flash movies

3.5.2.1 Flash movie *Edit* view

You can use the *Edit* view to upload Flash movies. Follow the same procedure for uploading Flash movies that you followed when uploading images (see Section 3.4.1, "Uploading an image" on page 81).

Note: You cannot allocate a hyperlink to a Flash movie because the attributes for Flash movies differ from those for images.

3.5.2.2 Flash movie *Properties* view

The Properties view has the following areas (see Figure 86, "Flash movie Edit view" on page 94):

- *Path* area. The file name of the original movie is used as the default name.
- *Attributes* area. Several of the attributes are the same as those for images (). Additional attributes are:
 - *Scale*:
 - With the default setting, (Omit Attributes or Show All) the complete movie will be displayed in the area specified. Furthermore, the aspect ratio for the

movie is also retained. This means that the film will not appear distorted. Occasionally, bars will also appear on either side of the movie.

- *No Border*. scales the film to fit the entire area specified while still maintaining the film's original aspect ratio. The film will not appear distorted. Sections of the film might occasionally be cut off.
- *Exact fit*. displays the film exactly within the area specified. However, this setting doesn't retain the film's original aspect ratio, which might cause the film to appear distorted.
- *Play*. If you wish the file to begin playback immediately, do not set this attribute. However, if you do not wish the file to begin playback until the user performs an action, set this attribute. This is equivalent to a STOP action in the first frame of your movie.
- *Quality*. Here you can specify the quality of your movie.
- *Backgroundcolor*. This is the background color of your movie. Flash doesn't offer many options, but you can manually set the background color in this field.
- *Align*: Left, Right, Top, Bottom.
- *Scaled Align*:
 - Left, Right, Top, Bottom aligns movies with the edge of the browser window you specify and, if necessary, cuts off the edges of the remaining three sides.
 - Top left, Top right, Bottom left, Bottom right aligns movies with the corner of the browser window you specify and, if necessary, cuts off the edges of the remaining two sides.
- *Loop*. Replays the Flash movie once it finishes. Select *Yes* or *No*.
- *Other area*
 - *Pluginspage*.
 - *Codebase*.

Figure 86 Flash movie *Edit* view



3.5.3 Using Quicktime movies

Follow the same procedure for Flash movies. Most attributes are the same with the exception of the following:

- *Scale.*
- *Autoplay.*
- *Show Controller.*
- *Volume.*
- *Hidden.*

See the vendor documentation for more details on Quicktime movie attributes.

3.5.4 Editing JavaScripts

3.5.4.1 JavaScript *Properties* view

You can use webEdition to create or edit JavaScripts. If you click on a JavaScript (.js) document or you select *File > New > Other > Javascript*, the Java script *Properties* view opens.

If you wish to copy an existing JavaScript from your directories, click the *Select* button in the *Copy Javascript* area. Thereafter you can rename the file by using the *Filename* field and then saving the document.

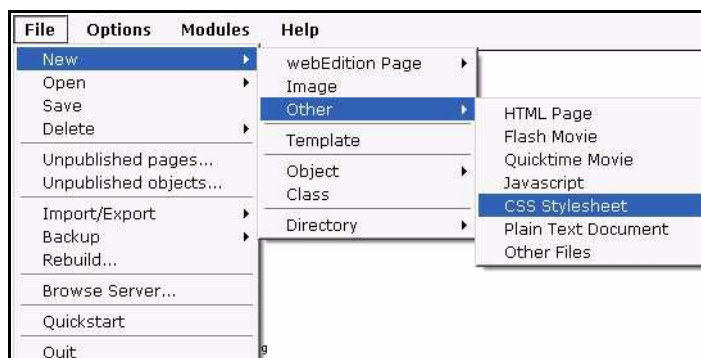
3.5.4.2 JavaScript *Edit* view

You can write your own JavaScripts (or modify an existing one) in the *Edit* view. Thereafter you can include your JavaScript in a template by using the `<we:js id="34"/>`. This code includes the JavaScript with the ID 34 in the template. The views are the same as those shown in Section 3.5.5, "Creating a cascading style sheet (CSS)" on page 95.

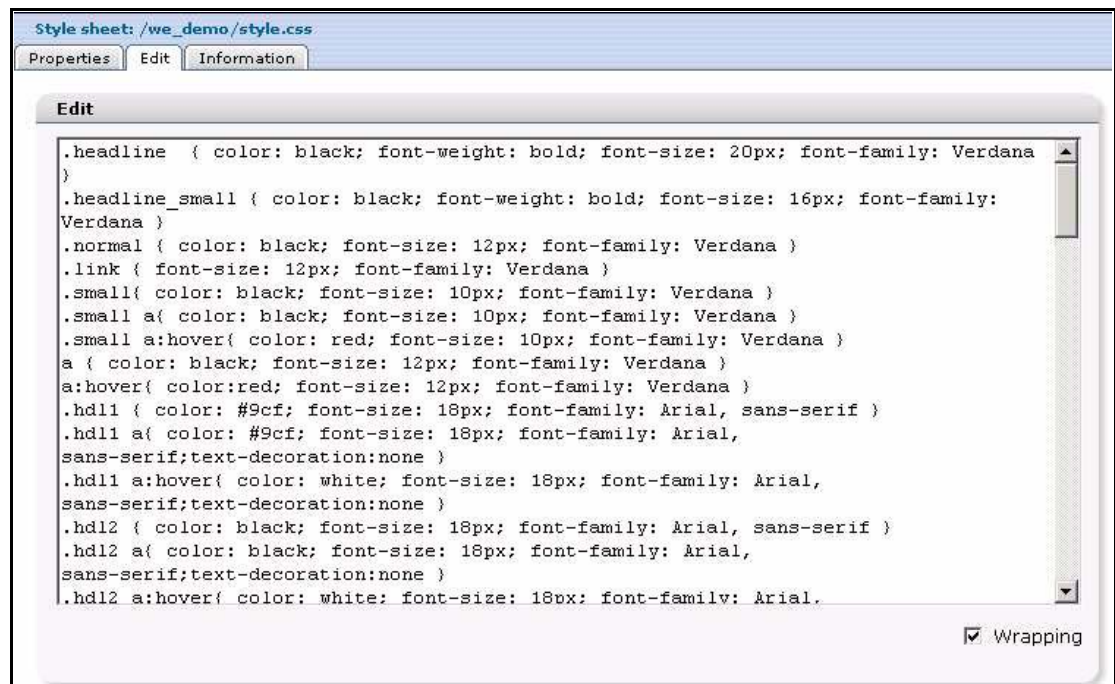
3.5.5 Creating a cascading style sheet (CSS)

You can use webEdition to create or edit a CSS. To do so click *File > New > Other > CSS Stylesheet*.

Figure 87 Creating a CSS



You can include a style sheet in the template by using the `<we:css>` tag. For example: `<we:css id="89"/>`. This code includes the style sheet with the ID 89 in the template.

Figure 88 Cascading style sheet in the *Edit* view

3.5.6 Other files

The following additional documents can be imported into webEdition so that they are available to be downloaded by visitors to your Web site:

- Microsoft Office documents (.doc, .xls, .ppt)
- PDF documents (.pdf)
- Zip files (.zip)
- Stuffit files (.sit)
- Programs (.exe)
- Mac Binhex files (.hqx)
- BIN files (.bin)

3.5.6.1 Uploading other files in the *Edit* view

To import a file, select the menu item *File > New > Other > Other Files*. The *Edit* view opens. Then follow the same procedure as you would when uploading an image (see Section 3.4.1, "Uploading an image" on page 81). The file name of the original file is used as the default name.

3.5.6.2 Other files *Properties* view

Select the directory in which you wish the document to be saved in the *Path* area of the *Property* view.

To make the file available to visitors to your site, link the document to a text entry or to a link list.

Note: The size of the upload can be limited. The default settings for MySQL are such that you can save up to a maximum of 1 MB of data per SQL-instruction. For PHP

the default setting for the maximum upload capacity is set to 8 MB. If you wish to upload larger files, change the settings in your MySQL and PHP configuration files, or speak with your service provider about increasing these default values.

3.6 Features in the *Options* menu

For details about the items available in the *Options* menu, see Figure 23, "The Options menu" on page 54.

3.6.1 Document types

The *Document types* feature is accessed from the *Options* menu. The *Document types* feature allows you to group documents with similar characteristics, or to assign characteristics to a new document that are similar to existing documents. Document types are intended to ease your workload by enabling you to set collective default attributes for documents. When you create a new page you will be asked to assign the document to a document type. When you do so, the new document will inherit the default values of the chosen document type.

The default values that you set will pre-define the location, template, and file extension. Once these values have been set as defaults, you will not need to set them again whenever you create a new webEdition page and assign it to a document type.

Secondly, because a document type can be allocated to any number of webEdition pages, you can use this feature to create a summary page that lists (and links to) of all pages based on a selected document type.

For example, you could create a "News" document type. You then allocate it a default storage directory, in this case "news", and a template called `news_template.tmpl`. Now, whenever you wish to create a new news page, you only need to select the "News" document type – both the template and the default storage directory for news pages will be selected automatically.

3.6.1.1 Creating a new document type

In the *Options* drop-down menu, select *Document Types...* The *Document types* dialog box appears (see Figure 89).

Figure 89 Creating a new document type

To create a new document type, click the *New document type* button.

A response box opens where you are asked for the name of the new document type. Enter the name and select *OK* (see Figure 90).

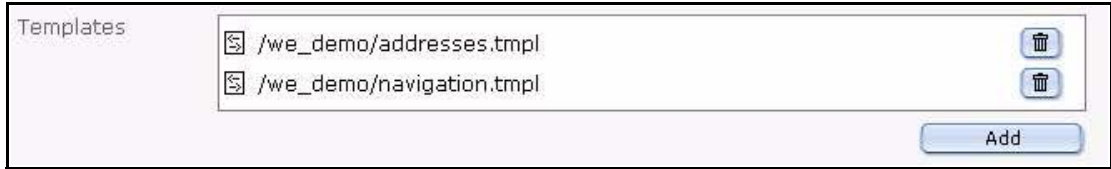
Figure 90 Naming a new document type

The new document type will appear in the list box as shown in Figure 91.

Figure 91 New document type/delete document type

The *Templates* area allows you to allocate the appropriate template(s) to the active document type, displayed in the *Name* area. Click on the *Add* button to browse your files for a template (see Figure 92).

Figure 92 Selecting a template for a document



In the *Default values* area, specify the default settings for the document type.

- *Directory*. Use the *Select* button to choose a directory for all webEdition pages based on this document type.
- *Subdirectory*. Use the pick list to create a subdirectory which is identified in your explorer menu by the date of creation. Thereafter all documents in this document type will be associated with the default creation date.
- *Default extension*. Use the pick list to select the default extension for all documents in this document type.
- *Template*. Use the pick list to select or de-select a default template.
- *Generate dynamic page*. Use this checkbox to choose whether or not you want the page to be dynamically created.
- *Is searchable?* Use this checkbox if you wish your page to appear on summary pages.

Note: If a page is not searchable, it will not appear on summary pages.

- *Category*.

Once you have specified all the settings, click *Save*.

3.6.1.2 Deleting a document type

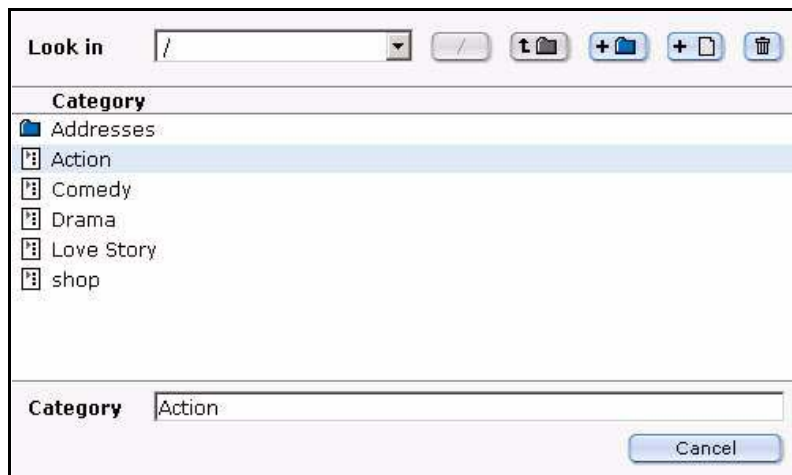
You can delete a document type by clicking an item in the list box located in the *Document type* dialog box and then clicking the *Delete document type* button (see Figure 91, "New document type/delete document type" on page 98).

3.6.1.3 Editing Document types

In the *Document types* section, select the document type you want to edit and follow the procedure described in Section 3.6.1.1, "Creating a new document type" on page 97.

3.6.2 Categories

The *Categories* feature is accessed by selecting *Options > Categories* in the main menu (see Figure 93). The *Categories* feature offers an alternate method of generating summaries. You can also use *Categories* together with *Document types* to generate sub-summaries.

Figure 93 The *Categories* feature

For example, if you have a "News" document type, you could subdivide it into "Sports", "Politics", "Computing" and "General" so that you can generate summary pages such as "Sports News". Thereafter, you could create sub-categories that are subordinate to the Sports category such as "Football", "Baseball", "Hockey", etc.

3.6.2.1 Creating a new category

Select *Options > Categories*. A file management window opens that allows you to create or delete categories and folders containing categories. This dialog box and its icons operate in the same manner as the *Browse Server* dialogue box (see Section 2.3.1, "The File menu" on page 51, for further details on how to use webEdition's file management windows).

3.6.3 Changing user name and/or password

You can change your user name by clicking on *Options > Change user name*. The *Change user name* screen appears (see Figure 94):

Note: If you have installed the User Management Module, you will see *User Management* in the menu. Click on this item to access the module and to perform user management functions. For details see *The User Management Module User Guide*.

Figure 94 Change user name screen

To modify your password, select *Options > Change password*. Enter your old and new passwords in the designated fields, then click on the *Save* button (see Figure 95).

Figure 95 Change password screen

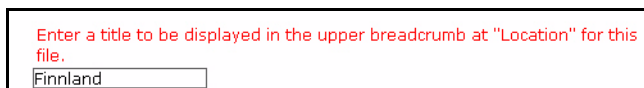
3.7 How an editor works within a template: using template input fields, lists and menus

Whether you are creating a new document or modifying an existing one, you will be working within a structure that is defined by a template. When you open or create a document in the *Edit* view, you see various fields, pick lists, or menus which you can fill with text, images, etc. This editing mode is your working interface; what you see in this view is not what the finished page will look like. To see how your page will look to visitors to your Web site, select the *Preview* tab. The following table summarizes the fields that commonly appear in the templates you will be using. The sub sections thereafter describe the fields in detail.

Field	Description	we:tag
Text input	A single input box.	we:input (text)
Date selection	A drop-down menu to enter date and time.	we:input (date)
Check box	A check box. Toggles a field on or off	we:input (checkbox)
Input choice box	A normal single-line input box with a drop-down menu beside it.	we:input (choice)
Text block	A multi-line input box.	we:textarea
Select box	A select box (also called a pick-list).	we:select
List block	Used to repeat blocks of fields	we:block
List of links	An expandable list of all your links.	we:linklist
Images	Allows you to insert images	we:img
Movies	Allows you to insert Flash or Quicktime movies	we:flashmove we:quicktime

3.7.1 Single-line input box (<we:input type="text">)


This field is used for single-line text blocks such as headers. You can also write HTML code in the input box (see Figure 96).

Figure 96 Sample page of single-line input box in the *Edit* view

Sample page: /we_demo/news/2004/finland.html

3.7.2 Date (<we:input type="date">)

By clicking on these fields, you can set the date you want to appear on the Web page (see Figure 97).

Figure 97 Sample page showing date fields

Sample page: /we_demo/news/2004/finland.html

3.7.3 Checkbox (<we:input type="checkbox">)

This field is used as a switch to insert or remove an area of a template.

3.7.4 Input choice box (<we:input type="choice">)

This feature allows you to create a single-line input box beside a drop-down menu (see Figure 98).

Figure 98 Using an input choice box

When you select an entry in the drop-down menu, the system copies your choice to the input box (on the left). You also have the option of typing your own value in the input box, if you require a value different from those in the pre-defined drop-down menu. The values available in the drop-down menu are pre-defined by your template administrator. For example, the template code seen in Figure 98 is as follows:

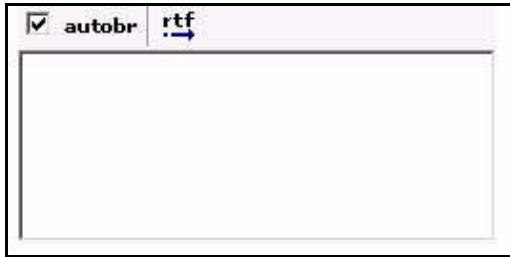
```
<we:input type="choice" name="City" size="40"
values="Berlin|Madrid|Ottawa|Washington" />
```

3.7.5 Text box (<we:textarea>)

The appearance of this text box is determined by the browser version you are using. We recommend using Internet Explorer 5.5 or higher, since it displays the text area as a WYSIWYG editing program if the *dhtmledit* attribute in the template is set to *ON*.

3.7.5.1 Normal input screen

This text box is intended to be used for relatively long texts. The text can be formatted or links can be inserted using HTML commands (see Figure 99).

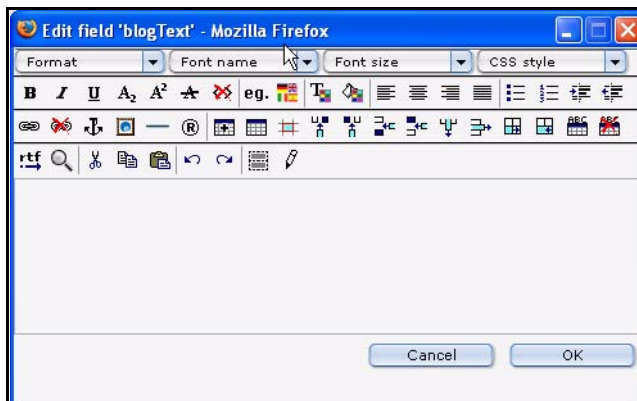
Figure 99 Using a text box

If the *autobr* (automatic line break) attribute has been specified (true or false), a checkbox will be displayed at the top of the input box. You can turn the *autobr* feature on or off using this checkbox. If *autobr* has been activated, all forced line breaks (return key) will be translated as HTML line breaks (`
`). If *autobr* has been set to *false*, the return key is equivalent to a space. For information on the *.rtf* function, see Section 3.7.5.4, "Importing Rich Text Format files (*.rtf)" on page 108. The code for Figure 99 is as follows:

```
<we:textarea name="Content" width="250" height="100" autobr="true"
wysiwyg="false" importrtf="true"/>
```

3.7.5.2 WYSIWYG input screen

If your template administrator has included a WYSIWYG editing screen in your template (by setting the *we:tag* attribute *wysiwyg* to *true*), the text box appears in the form of a WYSIWYG (What you see is what you get) text editor (see Figure 100).

Figure 100 Using a WYSIWYG input screen

You can edit texts in this field just as you would in a standard word processing program.

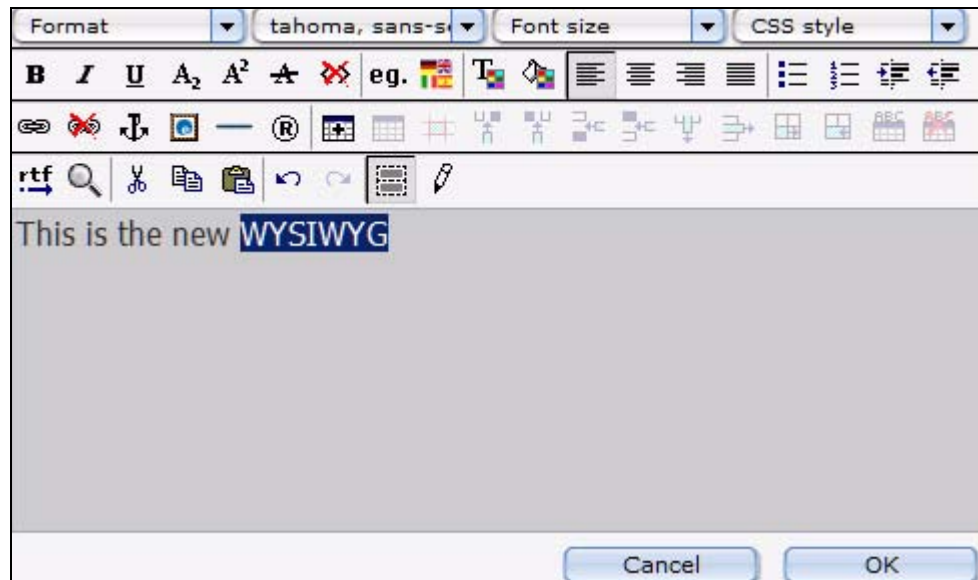
If you wish to work directly with HTML tags in the input box, you can do so by clicking the toggle that appears as a pencil icon directly above the input box. If you do so, the pencil icon will toggle to an eye icon, and the input box will allow you to enter HTML code (see Figure 101).

Figure 101 WYSIWYG toggle buttons

3.7.5.3 Accessibility functions of the WYSIWYG Editor (Version 3.2)

Beginning in webEdition Version 3.2 functions have been added to the WYSIWYG editor that make it easier for you to create Web pages that are accessible to the visually impaired. (see Figure 102).

Figure 102 WYSIWYG textfield in Version 3.2



3.7.5.3.1 Features for screen readers The following functions appear in Version 3.2:

- Expanded abbreviations for screen readers:

In order for a screen reader to read an abbreviation aloud, the abbreviation must be expanded. Highlight the abbreviation that appears in the text area, and click the “eg.” button from the WYSIWYG editor. The following window opens:

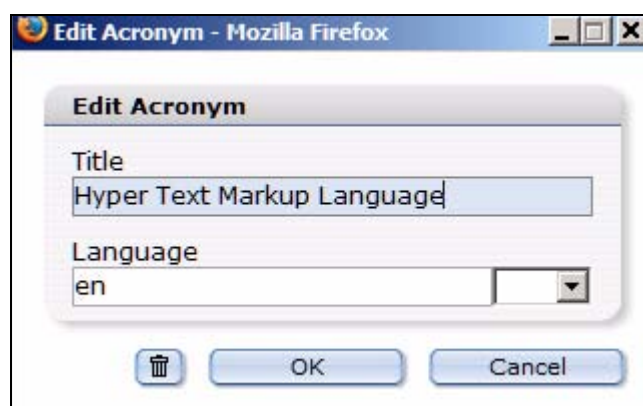


Figure 103 Define abbreviation for a screenreader

After highlighting the abbreviated term, the expression is entered in full in the *title* field. The language of the expression is defined by a 2-character country code in the *language* field. In our example, the definition for the abbreviation “HTML” is shown.

- Language selection for screen reader:

To enable screen readers to read foreign words correctly (that is, those that are not in the default language of the document), highlight the respective word and click on the *language* button (which appears as a group of flags). The following dialogue opens:



Figure 104 Language selection for screenreader

From the dropdown menu, select the two character international country code representing the language of the foreign term (for example, “de” for German, or “en” for English).

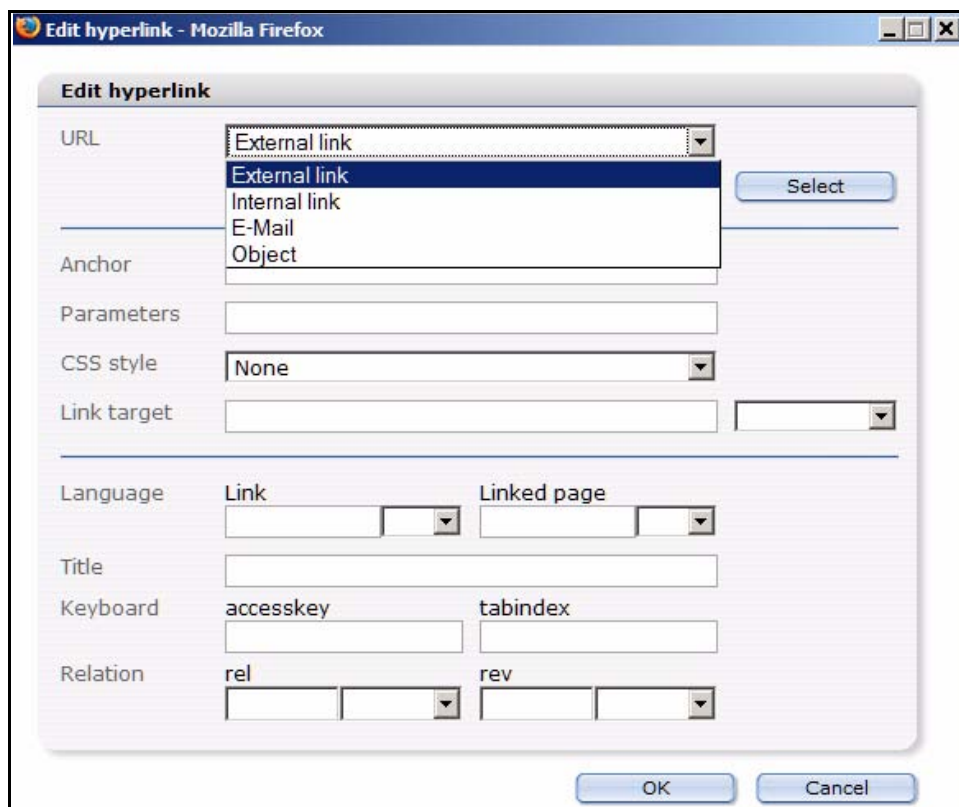
- *Edit Hyperlink* dialogue enhancements for screen readers

Additional fields appear in the Edit Hyperlink dialogue box beginning in Version 3.2 (see Figure 105 on page 106). To activate the hyperlink dialogue box, highlight the text that you wish to link, and click on the insert/edit link button (the chain icon). You can now set the language of the linked text as well as the language of the linked page (*Link* and *linked page* fields under *language*). These fields correspond to the HTML attributes *lang* and *hreflang*.

The fields *title*, *accesskey* and *tabindex* have been added. Under *accesskey* a character or a figure can be entered with which a link can be activated. The link can also be activated with ALT+ character/figure.

For *Tabindex*, a figure can be entered defining the order in which the links are navigated by pressing the *tab* key. Enter the title of the link in the *title* field. When the mouse is placed over the link, this title will be displayed in text (as a mouse-over) in most browsers.

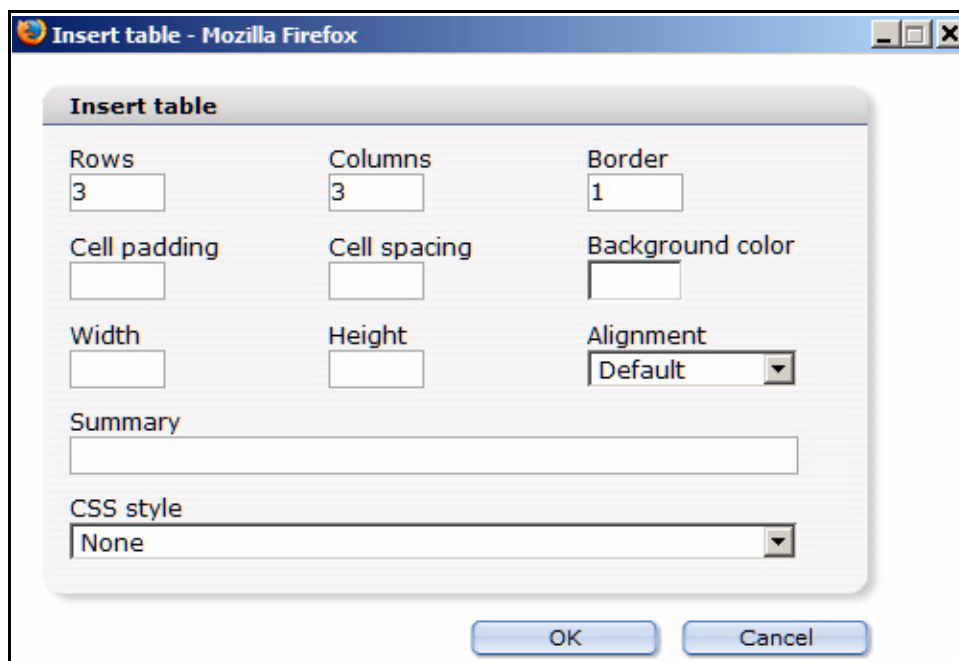
Figure 105 Edit Hyperlink in WYSIWYG



- Table *Summary* field for screen readers

If you click on the *Insert table* button in the WYSIWYG editor, you can add a summary for a table in the *Summary* field of the *Insert table* dialogue box (see Figure 106). A screen reader will read the summary as a description of the table.

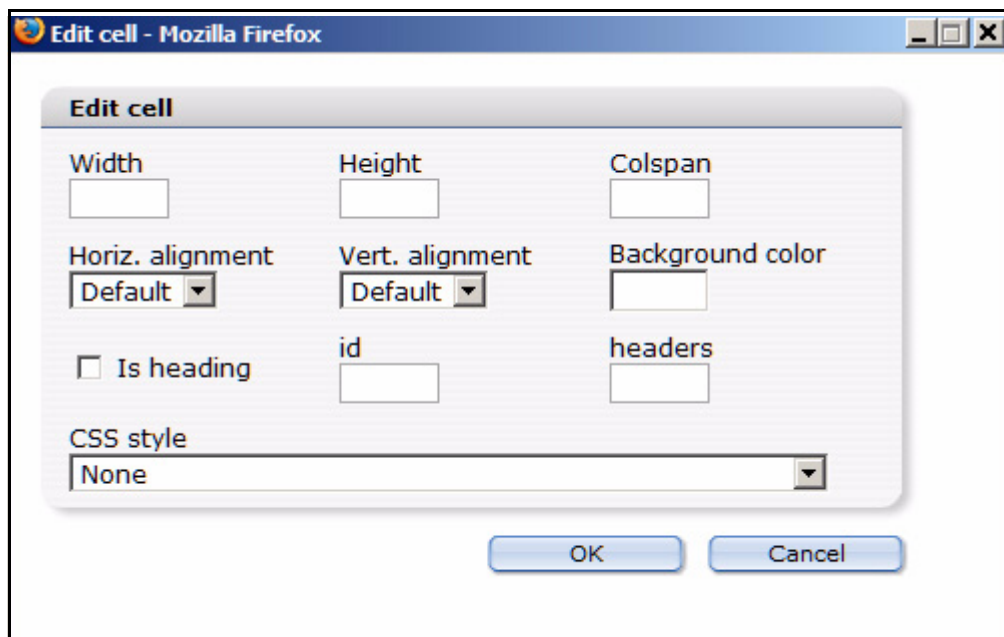
Figure 106 Insert table - table summary



- Editing table cells for screen readers

By clicking the *Edit table cell* button, table cells can be defined as headline cells (*th* instead of *td*) in the *Edit cell* dialogue box (see Figure 107). To identify a cell as the header, activate the *is heading* checkbox. Additionally, the attributes *id* and *headers* have been added for non-visual output (such as screenreaders), so you can explicitly reference a data cell to one or multiple headline cells. The system is thus able to repeat the content of the headline cell(s) for every data cell. Otherwise, it would be very difficult to establish a relationship between a data cell and a headline cell for the voice output, as voice output lacks the visual cues inherent in a table. To set these references, you must set a unique name for the *id* of the headline cell. In the data cells, you must enter this *id* in the *headers* field. Multiple *ids* are separated with spaces.

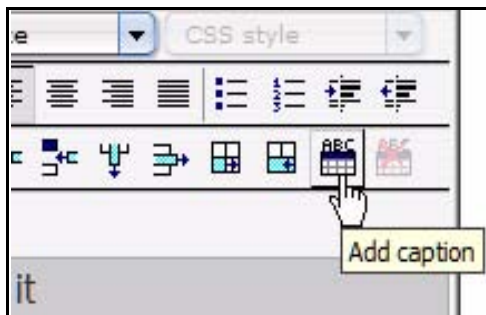
Figure 107 Edit table cell dialogue box



- Table captions for screen readers

After creating a table, a table caption can be added (or removed) by clicking the *caption* buttons. The caption will appear in the WYSIWYG editor field above the table.

Figure 108 Table caption



3.7.5.4 Importing Rich Text Format files (*.rtf)

You can import RTF files directly to either the normal or the WYSIWYG text input boxes. This means that you can write and format your text in a standard word processing application. Thereafter, you can import your text using the RTF import function and webEdition will retain your original formatting.

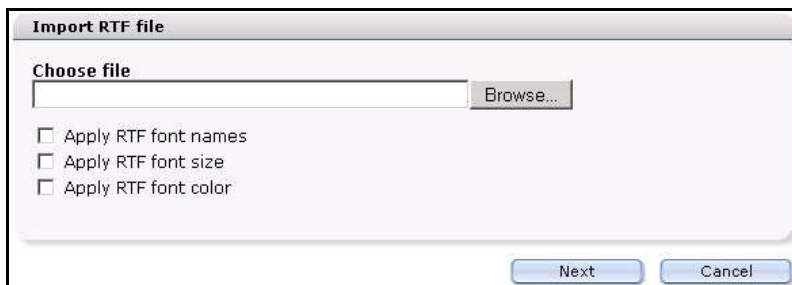
Note: The import button appears only if the *importrtf* attribute has been set to *true* in the template by the template administrator.



Figure 109 Import .rtf file button

By clicking on the *Import .rtf file* button (Figure 109), you open the following dialogue box (see Figure 110):

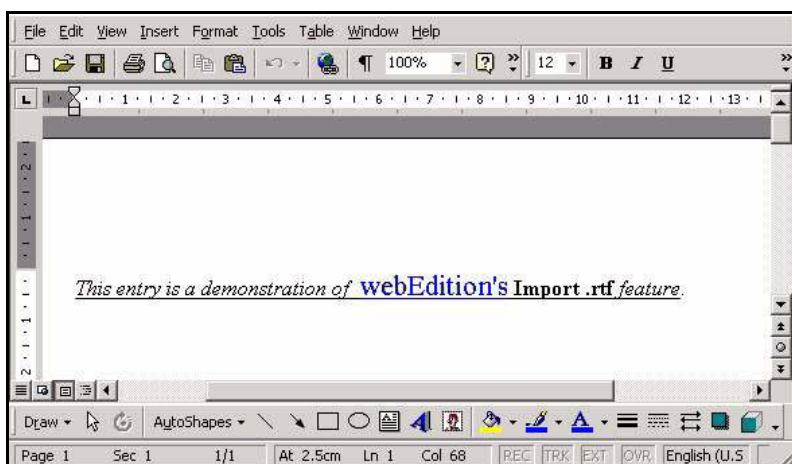
Figure 110 The Import RTF file dialogue box



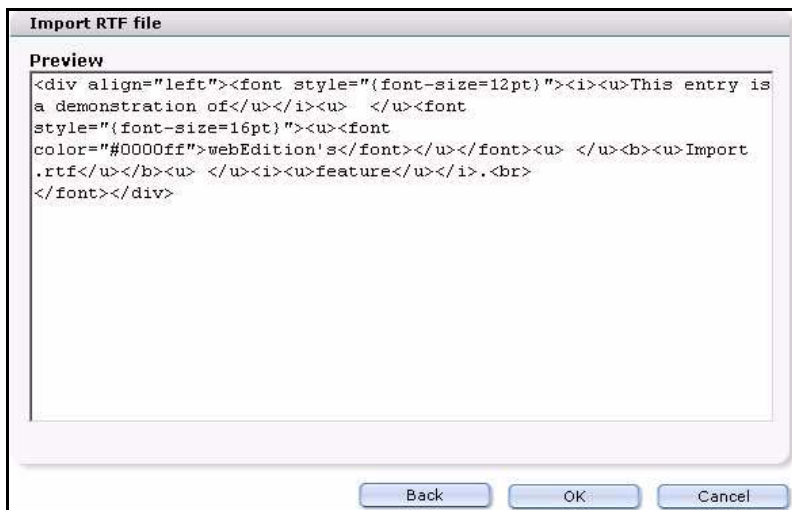
Locate the file you wish to import from your local hard drive by clicking the *Browse* button and then upload it to the preview field by clicking the *Import* button. All the formatting will be applied. Since there are many different RTF formats, only the font, font size and font color are not automated and thus optional.

Figure 111 shows an example of text to be imported from a word processing program.

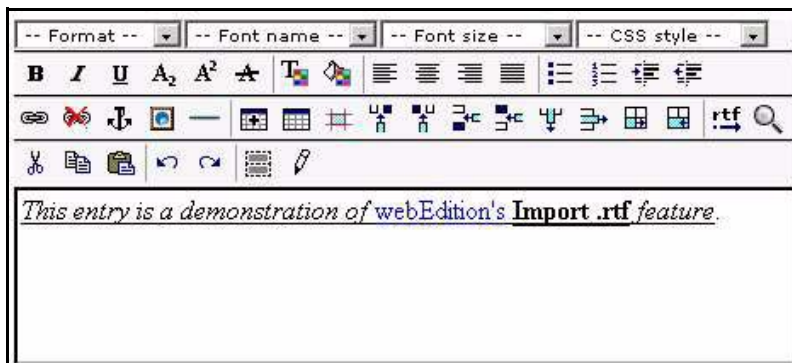
Figure 111 Example of an RTF file



Thereafter, the following content is seen in the *Preview* area (see Figure 112):

Figure 112 RTF text in *Preview* mode

Click *OK* to insert the imported text into the text box.

Figure 113 RTF text imported into webEdition

Note: RTF formats may differ from one application to another. Such differences may distort the way the text is displayed in webEdition. Such errors can be corrected in the *Edit* view.

3.7.6 Lists (<we:block>)

Lists are blocks of code which can be modified using the editing controls. You can duplicate a list item by clicking on the plus button. By clicking on the arrow icons, you can move a block up or down within the list. You can delete a block by clicking on the adjacent trash can icon. An example of a list block is shown in Figure 114.

Figure 114 Example of a list block

07	00	Good morning Software	<input checked="" type="checkbox"/> autobr	Software News from around the world
11	30	CMS-Systems	<input checked="" type="checkbox"/> autobr	Comparison of the best CMS - Systems
12	00	News, Weatherforecast	<input checked="" type="checkbox"/> autobr	News from around the world

When viewed in the preview view, the list block looks thus:

Figure 115 Example of a list block in *Preview* view

07:00	Good morning Software	Software News from around the world
11:30	CMS-Systems	Comparison of the best CMS - Systems
12:00	News, Weatherforecast	News from around the world

3.7.7 Link list (<we:linklist>)

You can use the link list feature to create link lists (see Figure 116). A plus button will appear, which you can click to add a new link to the list. Links can be deleted by clicking the trash can icon.

Figure 116 Example of a link list (*we_demo/includes/navigation.php*)

+	1	Accessibility	[ID: accessible]
+	1	Information	[ID: information]
+	1	About this Demo	[ID: demopage]
+	1	News	[ID: news]

When viewed in the preview view, the list block looks thus:

Figure 117 Example of a link list in *Preview* view

Accessibility
Information
About this Demo
News

The following procedure describes how to create and edit hypertext links. For the purpose of this procedure, see we_demo/links/links.html on the webEdition demo page.

Procedure 7 Adding and Editing links

In the Documents Edit view

- 1 Open the file `we_demo/links/links.html`, and click on the *edit hyperlink* button (see Figure 118).

Figure 118 Edit hyperlink button



The Edit link dialog box opens (see Figure 119).

Figure 119 Edit link dialogue box

- 2 In the *URL* area, specify whether the link is to be to an internal or external page or object by clicking one of the radio buttons.
- 3 Click the *corresponding Select* button to launch the file manager, where you can browse for and select your target document.
- 4 If you use frames, you can specify the target frame (`_name-targetframe`) in the *Link target* field. The select box to the right contains some standard target designations.
- 5 In the *Content* field, enter a text string that will appear as the link on your Web page. If you would rather link to an image, you can specify either an internal or external image as well as where it is to be positioned and the alternative text. You can also select an internal image using the file manager, which can be launched in the *Content* area by clicking the *select* button.
- 6 You have completed this procedure.

3.7.7.1 Accessibility enhancements for links in Version 3.2

In version 3.2, the link dialogue has been expanded (see Figure 120). The new fields improve your ability to create accessible Web sites. For more information about thes

fields, see Section 3.7.5.3, "Accessibility functions of the WYSIWYG Editor (Version 3.2)" on page 103.

Figure 120 Edit Link from Version 3.2 on

When linking images, you can also enter *Alternative Text* as well as a *Title* that will be read by screen readers.

Figure 121 Linking images in version 3.2

3.7.8 Select box (<we:select>)

A select box (or pick-list) allows you to choose one item from a list of pre-defined values (see Figure 122).

Figure 122 Select box

When working in the *Edit* view, click the arrow beside the box to view the values that are available to you. The value you choose will be displayed on the finished Web page. The template code is thus:

```
<we:select name="Cities" size="1">
  <option>London</option>
  <option>Paris</option>
  <option>New York</option>
  <option>Toronto</option>
</we:select>
```

3.7.9 Image field (<we:img>)

An image field allows you to insert an image in the page content (see Figure 123).

Figure 123 The image field



By clicking on the edit button, you will launch a file manager in which you can select an image that has been uploaded to webEdition. For further details, see Section 3.4, "Working with graphical documents" on page 81.

The code for Figure 123 is: `<we:img name="Picture"/>`

3.7.10 Movie fields (<we:flashmovie> and <we:quicktime>)

The movie fields allow you to insert a Flash or Quicktime movies in the page content (see Figure 124).

Figure 124 The Flash and Quicktime movie fields



By clicking on the edit button, you will launch a file manager in which you can select a Flash movie that has been created or uploaded to webEdition. The template code for Figure 124 is:

```
<we:flashmovie name="MyFlash" width="100" height="100"
  user="editor1,editor2"/>
```

For more information on Flash movies, see Section 3.5.2, "Using Flash movies" on page 93; for Quicktime movies, see Section 3.5.3, "Using Quicktime movies" on page 95.

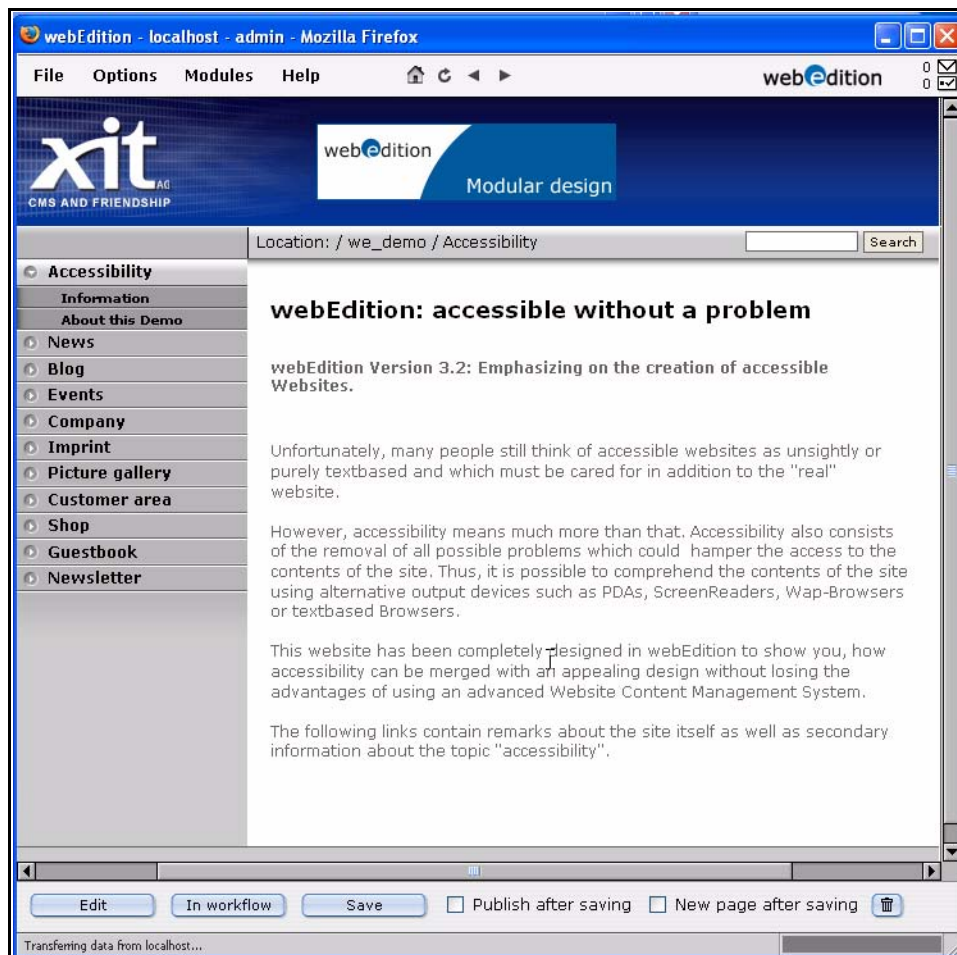
3.8 Editing documents in seeMode

seeMode is designed to make the editing of Web pages simple and efficient. This mode offers you a WYSIWYG view of your Web site. You can navigate through your site just

as you would with your regular browser (see Figure 125). When you get to the page you wish to edit, you simply click the *Edit* button at the bottom of the page.

Note: The seeMode feature in webEdition 3.0 cannot be used with Web sites that use HTML frames.

Figure 125 The seeMode preview



Those fields on your page which represent included files that can be navigated to and then modified are identified by a seeMode edit icon.

Figure 126 The seeMode included file list



The following procedure describes how you can use the seeMode to edit a document.

Procedure 8 Editing a document using seeMode

At the main webEdition login screen

- 1 Select the seeMode radio button, enter your user name and password (see Figure 127).

Figure 127 Login to seeMode



- 2 Click *Login*.

webEdition opens in seeMode at your designated home page (see, for example, Figure 125, "The seeMode preview" on page 114). The start page is determined in the Preferences screen (see Section 2.2.1, "The User interface view" on page 42). Your ability to change this start page is dependent on the permissions that you have been given by your administrator.

- 3 You have two choices. You can select *Edit* or *In Workflow*.

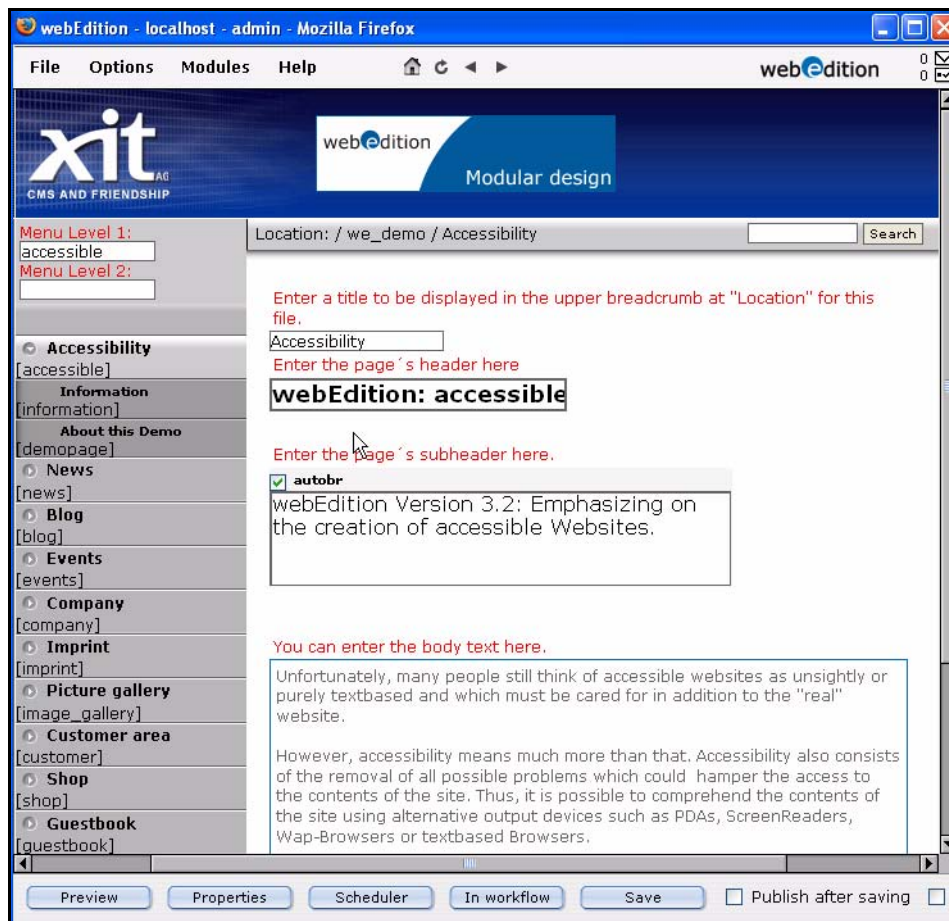
- a If you have installed the Workflow Module, you have the option of placing your document into the workflow.

Consult the documentation for the Workflow Module, then go to Step 6.

- b If you wish to edit the page, click the *Edit* button.

The page opens in the seeMode edit view and you can modify the fields (such as those described in Section 3.7, "How an editor works within a template: using template input fields, lists and menus" on page 101; see also Figure 128).

Figure 128 seeMode edit view



- 4 Edit your content by changing the data in the available fields.
- 5 Choose one of the following options:
 - a Return to the preview screen (by clicking the *Preview* button).
 - b Edit the properties of the page by clicking the *Properties* button (See Section 3.1.1 for further details).
 - c Place your document into the workflow.
 - d Save your changes (with or without selecting the *Publish after saving* option).

After saving your file, webEdition will confirm the action, the edit window closes, and you are returned to your designated home page.
- 6 You have completed this procedure.

4 Creating templates—the role of the administrator

The webEdition content management system differentiates between the role of the editor and the role of the administrator. The following chapter describes how administrators can use webEdition to create templates, as well as some of the features included in webEdition that can assist in this task. An administrator must have a knowledge of HTML and PHP programming to create a template.

4.1 What is a template?

Templates form the framework for a Web page. In a content management system, content is separated from the layout. The layout is created with templates designed by an administrator, while the content is created by editors in documents based on templates. Templates are normally created using HTML and expanded using we:tags.

Note: This manual always refers to the sample pages supplied with the software. Sample pages are located in the we_demo directory within the explorer menu.

4.1.1 What are we:tags?

we:tags comprise a tag language based on XML which contain HTML, JavaScript and PHP functions. They always begin with "we:". All webEdition features are defined by these tags. Like HTML tags, we:tags can have attributes. Although there are we:tags that require an end tag (such as <we:block></we:block>), most do not require an end tag.

4.1.2 How do I use we:tags?

There are many we:tags that serve many functions. All we:tags are described in detail in *The webEdition Tag Reference Manual*, which is available on the webEdition Web site. Some of the most commonly used we:tags are listed in the following table:

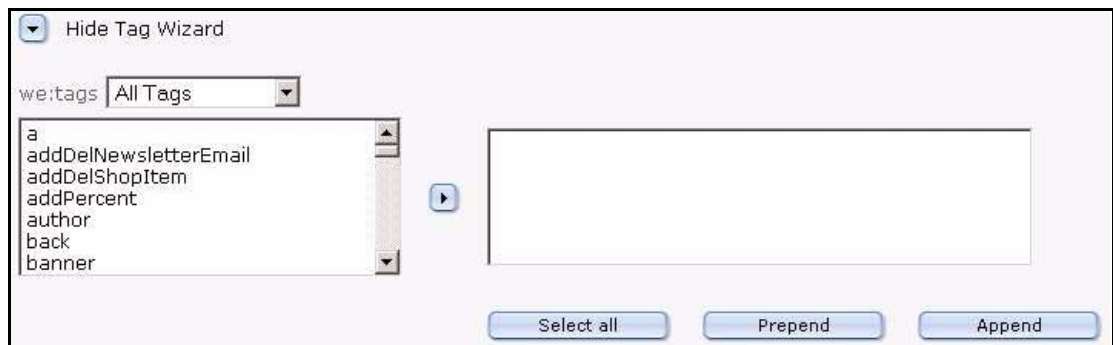
we:tag	Description
we:input (text)	Creates a single input box.
we:input (date)	Creates a drop-down menu to enter date and time.
we:input (checkbox)	Creates a check box.
we:input (choice)	Creates a normal single-line input box with a drop-down menu beside it.
we:textarea	Creates a multi-line input box.

we:tag	Description
we:keywords	Creates input boxes for the meta tags.
we:description	Creates input boxes for the meta tags.
we:title	Creates input boxes for the meta tags.
we:search (textinput)	Creates a single-line input box (also on the finished page) that can be used for queries.
we:search (textarea)	Creates a multi-line input box for queries.
we:select	Creates a select box.
we:category	Assigns the page / site to a category (important for summary pages).
we:linklist	This tag is used to generate expandable link lists.
we:link	Defines the link in link lists.

4.1.2.1 The Tag Wizard

webEdition provides you with a Tag Wizard when you are creating or editing a template so that you do not need to memorize the functions and names of all of the we:tags. (The Tag Wizard can be accessed from the template *Edit* view; see Section 4.2.2, "The Templates Edit view" on page 120). The scroll box on the left contains all available we:tags, listed in alphabetical order (see Figure 129). Select a we:tag and double click or click on the arrow between the two boxes.

Figure 129 The Tag Wizard



If this we:tag allows or requires you to assign attributes to it, a new window will open with a brief description of the tag and fields for all the attributes you can assign to it (see Figure 130). Any attribute you are required to assign are marked with an asterisk (*).

Figure 130 Assigning attributes using the Tag Wizard

we:input

Description The we:input tag creates a single-line input box in the edit mode of the document based on this template, if the type = 'text' is selected. For all other types, see the manual or help.

name *

type

size

maxlength

format

mode

value

values

html

php

num_format

user

* Entry required

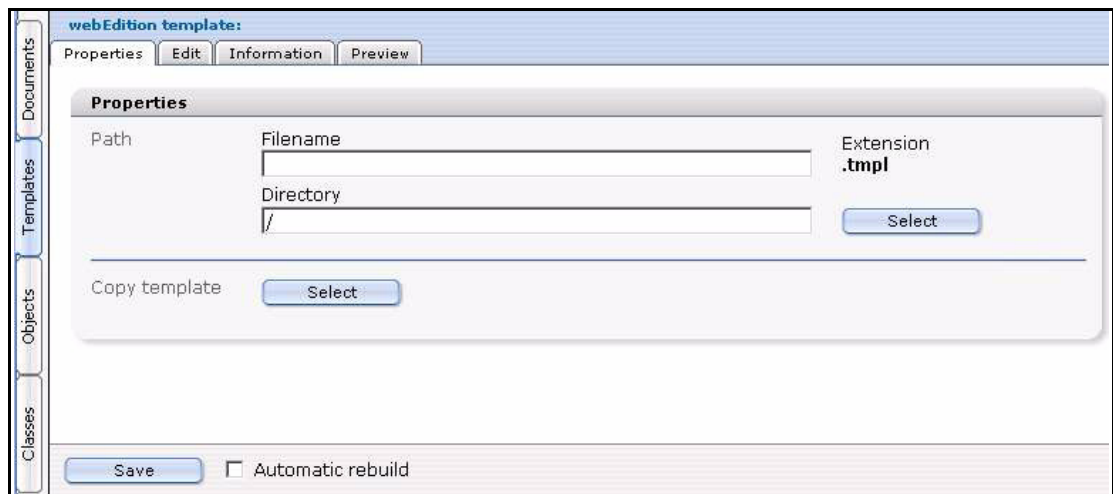
After saving your attributes, the window closes and the we:tag (complete with the selected attributes and correct syntax) will appear in the Tag Wizard text box to the right of the arrow button. Using copy and paste, insert the we:tag into the source code that appears in the text input box. You can also use the *Select all*, *Prepend* or *Append* buttons to insert the tag at the beginning or the end of the template code.

4.2 The four views when working with templates

In Chapter 2, we discussed how the editing screens and the available views are different depending on whether you are working with a document or a template. The following sub-sections describes each of these views as they pertain to your webEdition templates.

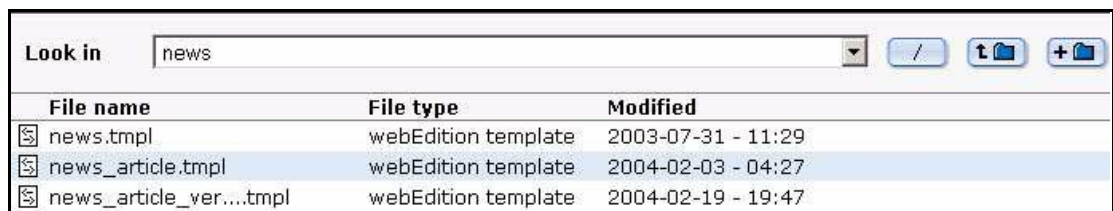
4.2.1 The template *Properties* view

You use the *Properties* view to define the name, location of your webEdition template (see Figure 131).

Figure 131 The *Templates Properties* view

The properties view has two areas: *Path* and *Copy template*.

- *Path*. This area allows you to enter the name of the template and the directory in which it is to be saved. Select the directory by clicking the *Select* button and using the file manager. To avoid input errors, the directory cannot be entered by hand. The file extension has been pre set to *.tpl*.
- *Copy template*. You can also import an existing webEdition template by clicking the select button in the *Copy template* area. Select the template you wish to import from the file manager and click *OK* (see *Figure 132*).

Figure 132 Copying a template using the file manager

4.2.2 The *Templates Edit* view

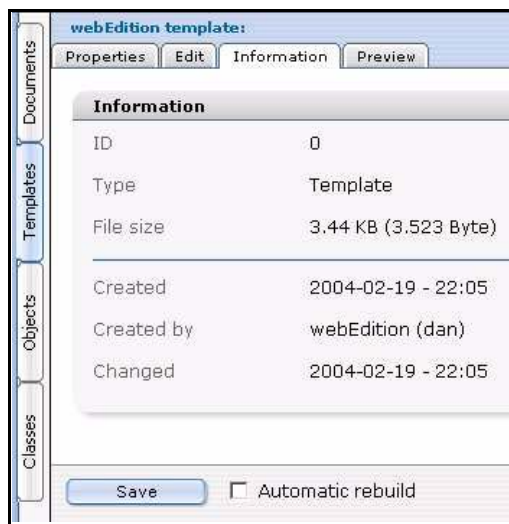
The *Edit* view displays the HTML code for the template (see *Figure 133*). The *Edit* view provides a text editing programme in which you can change or expand the standard HTML code and insert various we:tags.

Figure 133 The *Templates Edit* view

Below the text-editing area, you will find the webEdition Tag Wizard. The wizard assists you in finding and entering the we:tags and assigning the proper attributes to them. For more details on how the we:Tag Wizard works, consult Section 4.1.2.1, "The Tag Wizard" on page 118.

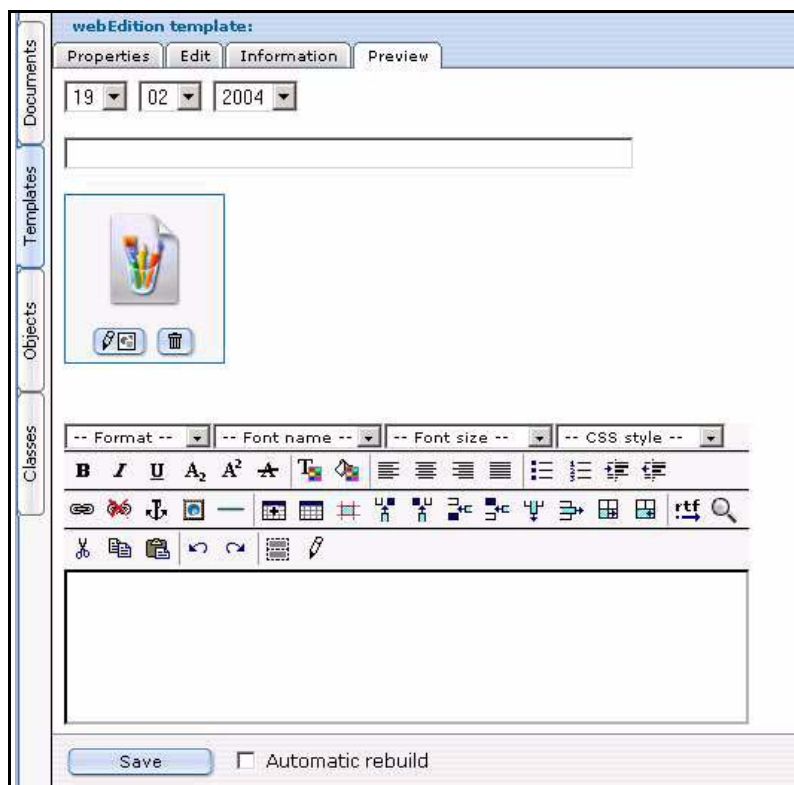
4.2.3 The *Templates Information* view

The Information view provides you with general information on the storage path, the size of the template and when it was created or changed (see Figure 134).

Figure 134 The *Templates Information* view

4.2.4 The *Templates Preview* view

The *Preview* view displays the layout of the template as it will appear in edit mode when used by the editor (see Figure 135).

Figure 135 The *Templates Preview* view

4.3 Creating templates

webEdition allows you to create new templates, or to import existing ones.

4.3.1 Creating templates using webEdition

If you wish to use webEdition to create a template, you enter the necessary HTML code in the text/code editing area in the template *Edit* view (see Section 4.2.2, "The Templates Edit view" on page 120).

A template must contain all of the standard HTML tags: `<html>`, `<head>` and `<body>` with their end-tags. In contrast, if you wish to include this template as a document using the `<we:include>` tag, you do not use these HTML tags.

When linking references (images, links, etc.) that determine the design of several pages (that can be spread out over different directory levels), that is the layout images, you must create an absolute link to the images. The URL is based on the root directory on the Web server (of your host). This is the only way to ensure that a layout image can always be found, no matter where the files using that image have been saved.

Sample template:

```
<html>
<head>
<we:title>CMS Channel</we:title>
<we:description>Demo-Website for the CMS
webEdition</we:description>
<we:keywords>cms,webEdition</we:keywords>
<style media="screen" type="text/css"><!--
#menul { position: absolute; z-index: 5; top: 63px; left: 131px;
width: 122px; height: 10px;visibility: hidden }
```

```
#dummy{ position: absolute; z-index: 1; top: 0px; left: 0px; width:
400px; height: 400px;visibility: hidden }
--></style>
<link href="<we:url id="89" />" rel="styleSheet" type="text/css">
</head>
<body background="/root/layout_images/bg.gif" bgcolor="white"
leftmargin="0" marginwidth="0" topmargin="8" marginheight="8">
<we:form id="114" method="get"><table border="0" cellpadding="0"
cellspacing="0" width="620">
<tr>
<td width="27"></td>
<td width="50"></td>
<td width="54"></td>
<td><span class="headline">&nbsp;  CMS Channel - </span><span
class="headline_small">News</span></td>
<td class="normal" width="74"><we:date type="js"
format="m/d/Y"/>&nbsp;  </td>
```

4.3.2 Creating a new template

Use the following procedure to create a new template.

Procedure 9 Creating a new template

At the webEdition main screen

- 1 Select *File > New > Template*.

The webEdition Template Properties view appears.

- 2 In the *Path* area of the *Properties* view, enter a name for the new template in the *Filename* field.
- 3 In the *Path* area of the *Properties* view, choose a directory for the new template by clicking the *Select* button adjacent to the *Directory* field.
 - a Navigate through the directory menus until you find the location for the new file.
 - b Click on the name of the target directory, then click *OK*.
- 4 If you wish to copy an existing template, click on the *Select* button in the *Copy template* area.
 - a Navigate through the directory menus until you find the location for the new file.
 - b Click on the name of the target directory, then click *OK*.
- 5 Click the *Save* button located at the bottom of the screen.

webEdition opens a read-only information box informing you that the new file has been successfully saved.
- 6 Click the *OK* button.

The newly created file is now listed in the explorer menu and you can now start editing your template, or using it as the basis of a new document.
- 7 You have completed this procedure.

4.3.3 Saving a template

You can save the template while working in any of the four views by clicking the *Save* button at the bottom of the screen (see Figure 135, "The Templates Preview view" on page 122).

If you change an existing template that is being used by documents, you will be asked whether you want to re-save the corresponding documents. If you select yes, the

template and all documents that use the template will be re-saved. If you select no, only the template will be saved and any documents based on this template will continue to use the old template. The option *Automatic rebuild* causes an automatic re-save of all documents which are based on this template.

4.3.4 Updating/modifying a template

To update or modify a template, either single-click the template in the explorer menu or select your template from the file browser by clicking on *File > Open > Template...* in the webEdition main screen. Make your changes in the *Edit* view and then save the template.

4.3.5 Deleting a template

You can delete a template by selecting menu item *File > Delete > Templates*. The application will then switch to delete mode. Use the explorer menu to select the template you wish to delete and click the *OK* button. Confirm or cancel your action.

Note: If a template is being used by one or more documents, you cannot delete it. If you try to do so, an error message will be displayed to this effect. If you still wish to delete the template, you will have to delete or modify all the documents that use the template before you can delete the template itself.

4.3.6 Adopting an existing Web site

4.3.6.1 Adopting an entire page

Determine how many HTML pages your current Web site uses. Group your pages according to their basic layouts in order to identify the pages that share the same layout but differ in their content. You can use these pages to create your new templates.

Procedure 10 Adopting an existing page

In the webEdition main screen

- 1 Create a new template, by clicking *File > New > Template*. (see Procedure 9, "Creating a new template" on page 123).
- 2 Click on the *Edit* tab to access the *Edit* view.
- 3 Copy the source code from the old HTML page you wish to use as a template into the code/text-editing area in the *Edit* view.
- 4 Replace the hard-coded HTML tags, text and images with their we:tag equivalents.

HTML tag	we:tag
images ()	<we:img>
Text	<we:textarea>
Heading	<we:input type="text">

Example

To replace an HTML image tag:

Old code:

```
<tr>
  <td><img scr="example1.jpg" width="100" height="30"
border="1"></td>
```

```
<td></td>
</tr>
```

New code:

```
<tr>
<td><we:img name="example1"></td>
<td><we:img name="example2"></td>
</tr>
```

And now instead of seeing images in the template preview, you will see a placeholder.

Example

To replace a text tag:

Old code:

```
<strong>>This is a sample heading in bold and italics</strong>
```

New code:

```
<strong><we:input type="text" name="sample"
size="20"></strong>
```

- 5 Create a new webEdition page based on the new template.
- 6 Copy the content from your original page(s) into the input boxes in the template(s) using copy and paste and/or import the images to the database. See Section 3.4, "Working with graphical documents" on page 81.
- 7 Save each page.
The new webEdition page is saved in the same location as the old page, thereby overwriting it.
- 8 You have completed this procedure.

You can find further information about the we:tags, their attributes, and their functions in *The webEditionTag Reference* that is available from the webEdition home page.

4.3.6.2 Adopting portions of a page

If you only want to manage portions of specific pages with webEdition, replace these portions with their we:tag equivalents and then save the page as a template. The template can be used to recreate the page.

4.3.7 Creating templates from documents made in HTML editing programs

You can create templates using an HTML editing program (such as Macromedia Dreamweaver or Adobe GoLive). For more information, see Section 4.3.6.1, "Adopting an entire page" on page 124.

Procedure 11 Creating a template from an HTML editor

Begin in your preferred HTML editor

- 1 Create a page in your preferred editing program.
- 2 Move all the layout images you need for the page to a folder called *images*.
- 3 Upload the images via FTP to your Web server in the directory you have chosen (such as layout_images in the root directory).
- 4 On your web server, use the global search and replace feature to replace all images/ with /images/.
- 5 Use the copy and paste feature to copy the source code for the HTML page to the webEdition template *Edit* view (See *Templates > Edit* view, upper text box).
- 6 Replace the text, images, Flash movies etc. that you wish to edit with the appropriate we:tags.

- 7 Define the functions you wish to include in the page using the appropriate `we:tags`.
- 8 Save the template.
- 9 You have completed this procedure.

4.4 Features for developing webEdition templates

The sub sections that follow describe the features that are available in webEdition to assist in the development of templates.

4.4.1 Link lists (`<we:link>` and `<we:linklist>`)

The `<we:linklist>` tag allow you to include expandable and editable link lists in your templates. You can change the appearance of these link lists using HTML commands. For example, you can design the link to be flanked by non-linked text or images. You can create both image links and text links. You can use almost all tags within a link list. To add a link to the linklist, use the `<we:link>` tag.

When using your template, the editor will be able to edit any link by clicking the *Edit* button or delete a link using the trash can icon. The editor can also add a link at the very end of the link list or can place it before any existing link. See Section 3.7.7, "Link list (`<we:linklist>`)" on page 110 for examples.

You can also use the `<we:prelink>` and `<we:postlink>` `we:tags` to ensure that all the characters or commands between `<we:postlink>` and `</we:postlink>` or those between `<we:prelink>` and `</we:prelink>` will not be displayed in the first or last instance. For example, if you separate the links with a `<p>`, then you want the `<p>` to appear only between the links and not directly before or after the link list. To keep this from happening, you would have webEdition skip the first instance of `<p>`, for example:

```
<we:linklist name="linklist">
  <we:prelink><p></we:prelink>
  <we:link/>
</we:linklist>
```

would produce for the first instance:

```
<a href="link">Linktext</a>
```

for two instances:

```
<a href="link">Linktext</a><p><a href="link">Linktext</a>
```

without the prelink tag, one instance would produce the following:

```
<p><a href="link">Linktext</a>
```

and for two instances:

```
<p><a href="link">Linktext</a><p><a href="link">Linktext</a>
```

Here is an example from a sample Web site:

```
<we:linklist name="Linklist"/>
<tr><td class="link" valign="top"><noabr><we:link></noabr></td>
<td></td>
<td valign="top" class="normal"><we:textarea name="Erklaerung"
rows="2"
cols="40"/></td></tr>
<we:postlink>
<tr>
<td colspan="3"></td>
</tr>
</we:postlink>
</we:linklist>
```

This code generates the following output:

Figure 136 Example of output for a link list



To allocate a stylesheet to the `we:link` tag, do this:

```
<we:link name="MyLink" class="foo"/>
```

4.4.2 Summary pages/areas

Summary pages provide an overview of all pages or areas that belong to a document type and/or category. (For example, all “news” or all news belonging to the “Sports” category). In addition, summaries can provide an overview of an entire Web site. Summary pages are also used to generate a results page for searches.

4.4.2.1 Creating a summary page

You use the `<we:listview>` `we:tag` to create summary pages. This tag must enclose all the other `we:tags` needed for summary pages (start-tag and end-tag). The `<we:listview>` tag must contain a `<we:repeat>` tag that defines the appearance of the entries listed in the summary. Everything bracketed by the `we:repeat` tags—including normal HTML (such as lines in a table) or the `we:tag` `<we:field/>`, which displays the content of a given field—will be repeated.

For example, assume that you have defined input boxes `<we:input type="text" name="Header"/>` and `<we:input type="date" name="Date"/>` in a news template belonging to the “newsArticle” document type. To generate a summary in which every line contains the date, header and a link to the news page, you would require the following code:

```
<we:listview doctype="newsArticle" rows="10">
  <we:repeat>
    <we:field type="date" name="Date"/>
    <we:field type="text" name="Header">
  </we:repeat>
  <we:back>back</we:back> <we:next>next</we:next>
</we:listview>
```

The `<we:back>` and the `<we:next>` tags, which create an automatic link to the previous/next page for entries listed within the summary, can also be placed within `<we:listview>`, although they cannot be placed within a `<we:repeat>` tag. However, this is only possible if the number of entries has been limited by the `rows` attribute in `<we:listview>`. If this attribute has not been specified, all the pages found will be displayed. If the `rows` attribute has been set to 10, only 10 entries will be displayed. Any `<we:next>` tag that has been included will create another link.

Here is an example from a sample Web site:

```
<we:listview rows="6" doctype="newsArticle" order="Date"
desc="true">
```

```
<table border="0" cellpadding="0" cellspacing="0" width="500">
<we:repeat>
<tr>
<td class="normal"><we:field type="date" name="Date"
format="m/d/Y"/></td>
<td></td>
<td class="normal"><b><we:field type="text" name="Headline"
hyperlink="on"/></b></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</we:repeat>
<we:ifNotFound><tr>
<td colspan="3" class="normal">No News available!</td>
</tr>
<we:else/><tr>
<td colspan="3" class="normal">
<table cellpadding="0" border="0" cellspacing="0" width="100%">
<tr>
<td colspan="2"></td>
</tr>
<tr>
<td class="normal"><we:ifBack><we:back>&lt;&lt;
Back</we:back></we:ifBack></td>
<td class="normal" align="right"><we:ifNext><we:next>weiter
&gt;&gt;</we:next></we:ifNext></td>
</tr>
</table>
</td>
</tr>
</we:ifNotFound>
</table>
</we:listview>
```

Figure 137 shows the output from this code:

Figure 137 Sample summary page

04/01/2003	<u>webEdition Software GmbH</u>
09/28/2001	<u>Time flies and time is running out under stress!</u>
09/27/2001	<u>Talai - the island of dreams!</u>
09/24/2001	<u>Get wind of the new energy!</u>

4.4.2.2 Creating a summary of all your pages

Summaries of all the pages in a Web site are generally needed for search results pages. These summaries are also useful if you have a small Web site with only a few pages and would like to create an automatic navigation facility.

If you want to create a summary of all your pages, do not specify any conditions in `<we:listview>`. Make sure that either all the pages have the same field names (such as header and date) or that an alternative field has been specified by means of the *alt* attribute in the `<we:field>` tag. For example: `<field name="Title" alt="Headline"/>`. In

this case, if the title field in the *Property* view is empty, the content of the *Headline* field will be displayed.

There are two reserved field names that you can use: `we_path` and `we_text`. `we_path` will cause the path of the page to be displayed, while `we_text` will cause the text content of the page to be displayed. You can limit the text content using the `max` attribute. If no entries have been made in any of the fields, or if the template does not have any input boxes, `we_text` will not produce any results.

Note: The syntax is `we_path`, *not* `we:path`; `we_text`, *not* `we:text`.

Here is an example from a sample Web site:

```
<we:listview rows="6">
<table border="0" cellpadding="0" cellspacing="0" width="500">
<we:repeat>
<tr><td class="normal"><b><we:field name="Title" alt="we_path"
hyperlink="on"/></b><br><we:field name="Description" alt="we_text"
max="200"/></td>
</tr>
<tr><td></td>
</tr>
</we:repeat>
<we:ifNotFound>
<tr><td colspan="3" class="normal">Leider nichts gefunden!</td>
</tr>
<we:else/>
<tr>
<td colspan="3" class="normal">
<table cellpadding="0" border="0" cellspacing="0" width="100%">
<tr><td colspan="2"></td>
</tr>
<tr><td class="normal"><we:ifBack><we:back>&lt;&lt;
Back</we:back></we:ifBack></td>
<td class="normal" align="right"><we:ifNext><we:next>Next
&gt;&gt;</we:next></we:ifNext></td>
</tr>
</table>
</td>
</tr>
</we:ifNotFound>
</table>
</we:listview>
```

Figure 138 shows the output from this code:

Figure 138 Sample of all summary pages

Calling up a summary page using this feature will display all relevant pages. The entry consists of the title and the description of the page (for webEdition pages, the latter is listed in *Properties*). If the page does not have a title or if it is an HTML page, the path will be displayed (alt="we_path") instead of the title. Likewise, if the page does not have a description, the first 200 characters of content on the page will be displayed.

4.4.2.3 Creating a summary of a specified area

If you wish to display a summary of a specified area, you must limit the output in the `<we:listview>` tag either by specifying the *doctype* attribute or the *categories* attribute.

The following code, for example, displays only those pages that belong to the "News" document type and the "Sports" and "Politics" categories.

```
<we:listview doctype="News" categories="Sport,Politics">
```

4.4.2.4 Using summaries to archive pages

You can use the *offset* attribute as an archiving feature for your news. First, create two summary pages. The `<we:listview>` tag on the first summary page (current news) might look something like this:

```
<we:listview doctype="News" order="Date" desc="true" rows="10">
```

This page displays the ten most recent news pages, assuming, of course, that your news articles all contain a date field. Don't add the `<we:next>` and `<we:back>` tags on this first page. Instead, insert a link to the second summary page (the archive page). The `<we:listview>` tag on the second summary page will also contain the offset attribute.

The `<we:listview>` will then look something like this:

```
<we:listview doctype="News" order="Date" desc="true" rows="10"
offset="10">
```

Next, insert the `<we:next>` and the `<we:back>` tags on this second page. The offset attribute ensures that the first entry listed is, in reality, the tenth news entry. This method allows you to keep the ten most recent news items on the first summary page and to archive the older items on the second summary page. Here is a sample first page (current news) displaying the ten most recent news items:

```
<we:listview doctype="News" rows="10" order="Date" desc="true">
  <we:repeat>
    <we:field type="date" name="Date"/>
    <we:field type="text" name="Headline" hyperlink="true"/><br>
  </we:repeat>
```

```
</we:listview>
```

Here is a sample second page (archive) listing all the other news items (beginning with the tenth news item):

```
<we:listview doctype="News" order="Date" desc="true" offset="10">
  <we:repeat>
    <we:field type="date" name="Date"/>
    <we:field type="text" name="Headline" hyperlink="true"/><br>
  </we:repeat>
</we:listview>
```

4.4.3 Creating a photo album

Before the editor of your Web Page can upload images to a photo album, you must create a photo album template in which the thumbnails can be displayed.

A photo album consists of summaries of thumbnails of photos (see Section 3.4.6, "The images Thumbnails view: thumbnail formatting" on page 88). If a visitor to your page clicks on a thumbnail, an enlarged image is displayed either in a separate popup window or in the same window.

A summary is created with the `<we:listview>` tag:

```
<we:listview contenttypes="img" searchable="false" rows="5"
cols="5">
  <we:ifBack><we:back>back</we:back>&nbsp;&nbsp;&nbsp;</we:ifBack>
  <we:ifNext><we:next>next</we:next></we:ifNext><br>
  <table border="2">
    <we:repeat>
      <we:tr>
        <td>
          <we:field name="Title"><br>
          <we:field border="0" thumbnail="100x70" id="505" type="img"
hyperlink="true" winprops="width=900,height=650,left=-1,top=-1">
          <br><br>
        </td>
      </we:tr>
    </we:repeat>
  </table>
</we:listview>
```

Use the attribute `contenttypes` to indicate which kind of document should be displayed. You can use the following values:

"img" = images

"wepage" = webEdition documents

"binary" = other documents

Use the attribute `searchable` to define which documents are to be displayed. If you wish only to display documents which are labeled as searchable, set the value to `searchable="true"`. If you wish to display documents which are not labeled as searchable, set the value to `searchable="false"`.

To display a HTML table with a listview, the attribute `cols` and the tag `<we:tr>` are available. If "cols" is set, `rows * cols` entries are displayed. The tag `<we:tr>` creates the HTML tag `<tr>` at the beginning of a new row; the tag `</we:tr>` creates the HTML tag `<tr>` at the end of a row.

You can access the meta information of an image (title, description, key words) with the tag `<we:field>` in a listview:

```
<we:field name="Title" />
<we:field name="Description" />
<we:field name="Keywords" />
```

With the attribute `winprops` you can define the properties of the photo that is to appear in a new popup window. (The syntax is equivalent to the *windowFeatures* of *window.open* in Javascript.) To center the window set a value of `-1` for both `left` and `top`.

Example

```
winprops="width=900,height=650,left=-1,top=-1"
```

To display the image, the tag `<we:field>` with the attribute `type="img"` can be used (among other tags), but only without indicating a name. If you want to display a thumbnail instead of the original image, indicate the name of the thumbnail at the attribute `thumbnail`. If `hyperlink="true"` is set, the field will be linked as always. Usually it is linked directly to the image. If that is not preferable, you can set the attribute `id`. Here you enter the ID of a webEdition document. This webEdition document is used for the detailed view of the image. The image will be displayed with a listview with `rows="1"` in the template of such a webEdition document. All necessary settings (such as "offset", "name" of the listview, "workspaceID", and "contenttype"), will be transferred to the document and thus to the listview automatically. The code of the listview appears thus:

```
<we:listview rows="1">
  <we:ifBack><we:back>back</we:back></we:ifBack>&nbsp;&nbsp;&nbsp;
  <we:ifNext><we:next>next</we:next></we:ifNext>
  <p>
    <we:repeat>
      <we:field name="Title"><br>
      <we:field type="img"><br><br>
    </we:repeat>
  </p>
</we:listview>
```

4.4.3.1 Creating multiple photo albums

With the tag `<we:href>` you can allow editors to choose between different photo albums or to create new albums. Each photo album requires its own directory. The editors can put all their photos into their respective directories. Below is a sample of the code:

```
<we:ifEditMode>
  Album:<br>
  <we:href reload="true" directory="true" file="false" type="int"
  name="album" output="id">
  <br>
</we:ifEditMode>
<we:setVar to="global" nameto="album" from="top"
namefrom="album_we_jkhdsf_intID" />
<we:listview contenttypes="img" searchable="false" rows="5"
cols="5" workspaceID="\$album">
```

In this example the value which is chosen in `<we:href>` is written in a global value with `<we:setVar>`. This value is then transferred to the listview `i`, attribute `workspaceID`. If `reload="true"` is indicated at the tag `<we:href>`, the page will be reloaded after choosing the directory. If you set the attributes `directory="true"` and `file="false"` directories, not files, will be chosen.

If the attribute `useparent="true"` is used in the detailed view at `<we:ifBack>` and `<we:ifNext>`, it can only be scrolled to the last entry of the summary listview.

Example: If image 11 to 20 are displayed in the summary listview and you have chosen an image, you can only scroll forward to entry 20 and back to entry 11.

```
<we:listview rows="1">
  <we:ifBack
useparent="true"><we:back>back</we:back></we:ifBack>&nbsp;&nbsp;&nbsp;
  <we:ifNext
useparent="true"><we:next>forward</we:next></we:ifNext>
  <p>
    <we:repeat>
      <we:field name="Title"><br><we:field type="img">
      <br><br>
    </we:repeat>
  </p>
</we:listview>
```

4.4.4 Producing and changing pages and objects from the front end

webEdition offers tags which enable the visitor of a Web site to produce and change webEdition documents and objects. With webEdition, one can easily produce such things as a guestbook, or some other type of page in which visitor input is solicited. The `<we:form>` tag serves as the foundation of this feature.

The `<we:form>` tag has been extended with two new types: `<we:form type="document">` and `<we:form type="object">` which can be used depending upon whether one wishes to produce a webEdition document or object. For webEdition documents, the document type must be entered as a value of the attribute *doctype*; for objects, the ID of the class must be entered as a value of the attribute "classid".

You cannot produce or change webEdition documents without the document type. The individual fields are depicted through the `<we:userInput/>` tag between the start and the end tag of the `<we:form>`. The value which one allocates to the attribute *type*, will determine which type it handles. For a full description of these tags and their attributes, see the *webEdition Tag Reference*.

```
<we:form type="document" id="56" doctype="Guestbookentry">
  <table width="500" border="0" cellspacing="0" cellpadding="5"
align="center">
    <tr>
      <td class="t4"><strong>Guestbook entry</strong></td>
      <td align="right" nowrap>
        
      </td>
    </tr>
    <tr>
      <td class="t3" colspan="2">
        <p>
          <strong>Your name:</strong><br>
          <we:UserInput name="Name" type="text" size="60"/>
        </p>
        <p>
          <strong>Your address:</strong><br>
          <we:UserInput name="Ort" type="text" size="60"/>
        </p>
        <we:userInput name="Datum" type="date" hidden="true"/>
      </td>
    </tr>
    <tr>
      <td class="t3" colspan="2">
        <strong>Your comments:</strong><br>
        <we:userInput type="textarea" name="Text" width="500"
height="200" autobr="true" wysiwyg="true">
      </td>
    </tr>
  </table>
```

```
commands="prop,list,link,color"/></td>
</tr>
<tr>
  <td class="t3" colspan="2"><input type="submit"
value="Submit">&nbsp;<input type="reset" value="Reset">
</td>
</tr>
</table>
</we:form>
```

For the attribute *id* of the `<we:form>` tag, the ID of the webEdition document is entered as a value, where the form is to be sent. This can be a connecting page on which one shows the input again, or similarly a page that saves and publishes the input if applicable. Two possibilities are described below:

- The `<we:write>` tag is placed at the very beginning of the template in order to save the data transferred from the form. For example:

```
<we:write type="document" publish="true"
doctype="Guestbookentry"/>
```

After the `<we:write>` tag one can detect with the `<we:ifWritten>` or `<we:ifNotWritten>` tags, whether or not the write-process was successful for the webEdition document or object. For example:

```
<we:ifWritten type="document">
Thank you for the entry in our guestbook!
<we:else/>
Unfortunately there is an error in the entry in our guestbook!
</we:ifWritten>
```

- If you would like to send the given data first to a connecting page, use the `<we:form>` tag in combination with the `<we:userInput>` tag once again. In contrast to the input-page, one now sets the entry field to "non-editable". You can cause this

to happen by setting the "editable" attribute in the `<we:userInput/>` tag to the value "false".

For example:

```
<we:form type="document" id="57" doctype="Guestbookentry">
  <p>Enter your comments here:</p>
  <table width="500" border="0" cellspacing="0" cellpadding="5"
    align="center">
    <tr>
      <td class="t4"><strong>Guestbook entry</strong></td>
      <td align="right" nowrap>
        
      </td>
    </tr>
    <tr>
      <td class="t3" colspan="2">
        <p>
          <strong>Your name:</strong><br>
          <we:UserInput name="Name" type="text" editable="false"/>
        </p>
        <p>
          <strong>Your address:</strong><br>
          <we:UserInput name="address" type="text"
            editable="false"/>
        </p>
        <we:userInput name="Datum" type="date" hidden="true"/>
      </td>
    </tr>
    <tr>
      <td class="t3" colspan="2">
        <strong>Your comments:</strong><br>
        <we:userInput type="textarea" name="Text"
          editable="true"/>
      </td>
    </tr>
    <tr>
      <td class="t3" colspan="2">
        <input type="button" value="Back"
          onclick="history.back()">&nbsp;&nbsp;&nbsp;
        <input type="submit" value="Submit">&nbsp;&nbsp;&nbsp;
        <input type="reset" value="Reset">
      </td>
    </tr>
  </table>
</we:form>
```

ATTENTION

If you give a value to the attribute "name" in the `<we:form>` tag, you must also enter the name of the form as a value of the attribute "formname" in the `<we:write>` tag.

In order to allow a visitor to a Web site to change a webEdition document or object, use the `<we:a>` tag and set the attribute *edit* to the value *document* or *object*. If the tag is used in a `<we:listview>` tag, the proper listview entry is used automatically as a reference for it. In order to ensure that only the creator of a webEdition document or object can change them, a field must be set in the webEdition document or object in which the ID of the creator is stored.

If you have installed the Customer Management Module, you can set the name of the aforesaid field as a value of the *userid* attribute in the `<we:write>` tag. In addition, you can give the name of a field from the Customer Management Module as a value for the attribute *admin*. If a value (except 0) is entered in this field for a customer, this user is allowed likewise to change the webEdition document or object. By using the `<we:ifRegisteredUserCanChange>` tag, you can determine whether or not a customer is allowed to edit a webEdition document or object. The two attributes *userid* and *admin* have the same meaning as with the `<we:write>` tag.

If you wish to enter a category, you can use the `<we:categorySelect>` tag. This is accomplished using an easy drop-down menu with which you are able to choose the desired category. An end tag must be used with this tag, even if you have set no `<option>` tags.

The input can also be saved in a PHP session. This means that the input will not be lost, even if you refer to another page from time to time. The only conditions are that the form must be sent to a webEdition document that contains a `<we:form>` tag in which either *document* or *object* has been set as a value of the attribute *edit*, and that the `<we:sessionStart>` tag appears at the beginning of every template. The data of the session will be deleted automatically by a `<we:write>` tag.

4.4.5 Including documents (`<we:include>`)

If there are components on your Web site that appear on all templates/pages (such as a navigation system), you can use webEdition to store them in a file and then to include the file using the `<we:include>` tag.

Create a template for the document (i.e. a simple link list) that you wish to include in another document. Create the source code as an HTML document using the template you just created. Let's assume that the document you wish to include has the ID 100. Next, write `<we:include id="100"/>` at the point in the main template where you want the document to be inserted. Any change you might make now to the document will be automatically applied to the documents that use the main template, assuming that the documents are dynamic. If you have static documents, you must perform a rebuild before the change can be applied. This feature allows you to create all kinds of dynamic navigation features—even using DHTML—which can then be expanded by an editor, even if he or she does not know any programming languages.

The left-hand navigation system on all our sample pages was created using the `<we:include>` tag.

Example:

```
<td class="normal" width="27"></td>
<td colspan="2" class="normal" valign="top">
  <we:include id="90"/></td>
<td bgcolor="white" colspan="2" valign="top">
```

Here is the code for the finished file navigation.html (ID=90) that you want to insert:

```
<p><a href="/root/index.php"
style="text-decoration:none">News</a></p>
<p><a href="/root/filmberichte/all.php" style="text-
decoration:none">Filmberichte</a></p>
<p><a href="/root/programm/programm.html" style="text-
decoration:none">Programm</a></p>
```

```
<p><a href="/root/links/links.html" style="text-decoration:none">Links</a></p>
```

Here is the result in /root/index.php:

```
<td class="normal" width="27"></td>
<td colspan="2" class="normal" valign="top"><p><a
href="/root/index.php"
style="text-decoration:none">News</a></p>
<p><a href="/root/filmberichte/all.php" style="text-
decoration:none">Filmberichte</a></p>
<p><a href="/root/programm/programm.html" style="text-
decoration:none">Programm</a></p>
<p><a href="/root/links/links.html" style="text-
decoration:none">Links</a></p></td>
<td bgcolor="white" colspan="2" valign="top">
```

4.4.6 Search feature

The webEdition database architecture makes it easy to create a search feature for all your pages. You do not need to index the entire Web site, as you have to do for most search tools.

Begin by creating a results page where the search results can be displayed. This page is a normal summary page (see Section 4.4.2.2, "Creating a summary of all your pages" on page 128). Let's assume that the ID for the results page is 100. Next, insert the `<we:form>` tag with the following attribute `<we:form id="100">` into your template at the point where you want the search input box to appear. Afterwards, write in the `we:tag` for the search field itself: `<we:search type="textinput" size="50"/>`. Now you can insert a normal HTML submit button: `<input type="submit" value="suchen">`, followed by the `<we:form>` end tag: `</we:form>`. For example:

```
<we:form id="100">
  <we:search type="textinput" size="50"/>
  <input type="submit" value="search">
</we:form>
```

If you enter something in the search field on the finished page and then click the *Search* button (or pressing *RETURN* on your keyboard), the system directs the search query to the results page you created earlier, which will display the search results.

Below is a sample from our sample Web site (/news/news.tmpl):

```
<td colspan="2" align="right">
  <we:form id="114" method="get"><span
class="normal"><b>Search:</b><span
class="normal">&nbsp;</span>
  <we:search type="textinput" size="15"/><span
class="normal">&nbsp;</span><input type="submit" value="OK"><span
class="normal">&nbsp;</span>
</we:form></td>
```

Figure 139 shows the input box created by this code:

Figure 139 Sample input box



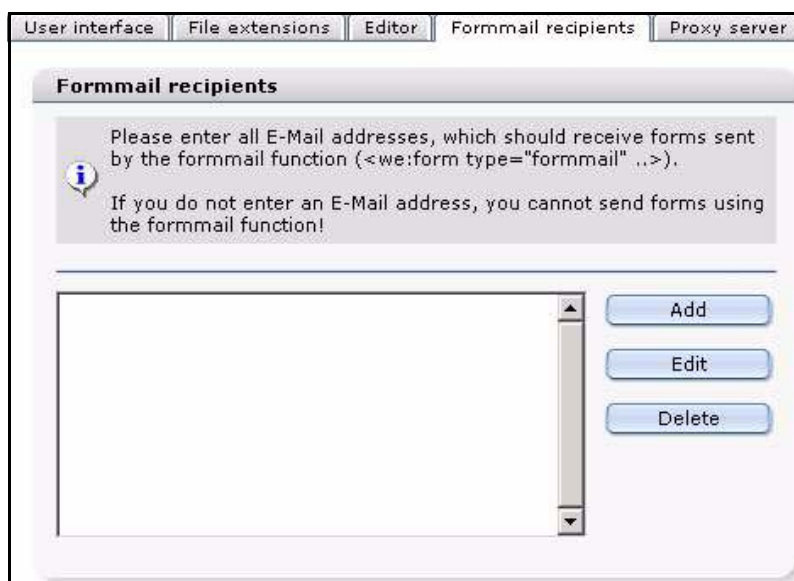
4.4.7 E-Mailing a form

You can use webEdition to create forms that can be sent to an E-mail address. The basic component of this feature is the `<we:form>` tag. Begin by creating a form using HTML tags. However, instead of inserting the HTML `<form>` tag, use the `<we:form>` tag. Insert the `type="formmail"` attribute in the `<we:form>` tag. You also must insert the `recipient` attribute to specify where the E-mail address will be sent. You can also use the `required` attribute to specify which of the fields in the form have to be filled in. For this attribute, separate the names of the fields using commas. The `order` attribute determines in which order the fields will be listed in the E-mail to be sent. Delimit the names of the fields using commas for this attribute. Use the `onerror` and `onsuccess` attributes to provide the IDs of the pages you want to display if there are any erroneous entries (for example, not all the required fields were filled in), or if all the entries are correct. If you want the E-mail to use a specific subject, enter it using the `subject` attribute. If you choose to use the `mimetype="text/html"` attribute, the mail will be sent in HTML format. Only use this attribute if you know that the recipient of the E-mail has an E-mail program that can display HTML E-mails. If you create a form field with the name "E-mail", this value will be written to the sender address field in the E-mail. webEdition can only write to the sender address field if the address has been entered properly. To ensure that the address is correct before sending the E-mail, webEdition tests the address field and issues a warning if the address is incorrect. For example:

```
<we:form type="formmail" recipient="email@domain.com"
required="email,name,forname" order="name,forname,email"
subject="Form from
my web site" onerror="66" on success="23" mimetype="text/html">
<p>Email: <input type="text" name="email"></p>
<p>Name: <input type="text" name="name"></p>
<p>Forname: <input type="text" name="forname"></p>
<p><input type="submit" value="Send"></p>
```

Note: webEdition has a security feature that prevents the sending of unsolicited E-mail (spamming). By selecting *Options > Preferences > Formmail recipients*, a view opens in which you can enter the E-mail addresses to which formmails are to be sent. All other addresses will be blocked.

Figure 140 The *Formmail recipients* view



New addresses can be entered by clicking on the add button. To edit addresses, click the appropriate address, then click the *Edit* button. To delete an address, click the appropriate address, then click *Delete*.

4.4.8 Working with HTML frames

If your Web site uses HTML frames, you can use webEdition to display the content of each individual frame set. You can either directly upload the frame sets to the server yourself (without using webEdition) or you can program them as HTML pages in webEdition. You can use the `<we:ifNotWebEdition>` tag within the webEdition editing program to eliminate any JavaScripts that load a frame set that belongs to a page or that remove frame sets that do not belong to a page. The code located between the start tag and the end tag will not be executed or displayed when you edit the page in webEdition.

5 Banner/Statistics: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Banner/Statistics Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Banner/Statistics Module. These topics are treated in the following sections:

- Section 5.1, "What is the webEdition Banner/Statistics Module?" on page 141
- Section 5.2, "Installation" on page 142
- Section 5.3, "General information and navigation" on page 142

5.1 What is the webEdition Banner/Statistics Module?

The webEdition Banner/Statistics Module allows webEdition users to create and administer banners on Web pages. Detailed statistics can be created for every banner so that users can track the effectiveness of their banner campaigns.

The Banner/Statistics Module conforms to the basic layout and programming principles of webEdition. The Banner/Statistics Module can only be used with webEdition (although you can also show banners on "external" sites, that is, sites that were not created using webEdition).

This module can be used by anyone who has a basic knowledge of how webEdition functions.

The Banner/Statistics Module allows you to perform the following functions:

- define banners from webEdition images
- order your banners in groups
- include as many banners you like in your site
- weight your banners
- show banners on static and dynamic pages (internal and external pages)
- view the statistics for each banner on each site (views, clicks and click rate)
- view statistics on the number of times your pages have been visited by using a transparent .gif file instead of a banner

If you have purchased the webEdition Customer Management Module an additional feature is available to you. You can set one or more customers as the owner of every banner or group of banners. You can also provide customers with detailed statistics about their banners.

5.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

5.3 General information and navigation

The following sections describe the general layout of the Banner/Statistics Module and how you navigate through the screens.

5.3.1 Opening the Banner/Statistics Module

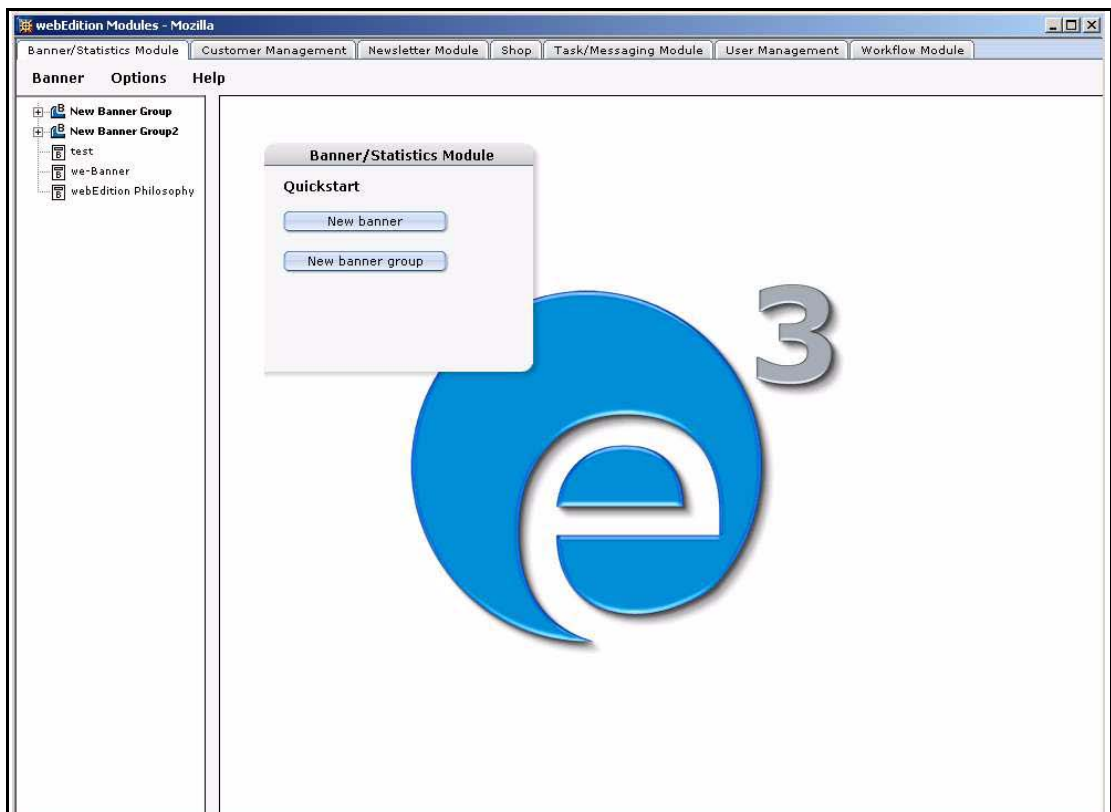
After installing the Banner/Statistics Module, *Banner/Statistics Module* will appear as an option in the *Modules* drop-down menu (see Figure 141).

Figure 141 Module menu showing the Banner/Statistics Module



Modules	Help
Banner/Statistics Module...	
Customer Management...	
Database/Object Module...	
Newsletter Module...	
Scheduler...	
Shop...	
Task/Messaging Module...	
User Management...	
Workflow Module...	
Editor Plug-in...	
Module Installation...	

To open the module, select Banner/Statistics Module from the Modules drop-down menu on the main webEdition page. The Banner/Statistics Module main screen opens showing the *Quickstart* screen (see Figure 142).

Figure 142 Banner/Statistics Module main screen with *Quickstart*

Using the *Quickstart* screen, you have the option of going directly to a new banner or to a new banner group.

5.3.2 The Banner/Statistics Module main page: drop-down menus

There are three drop-down menus on the Banner/Statistics Module main page:

- *Banner*
- *Options*
- *Help*

5.3.2.1 The *Banner* menu items

The *Banner* drop-down menu has the following items (see Figure 143):

**Figure 143 The *Banner* menu items**

- *New*. The *New* command has two sub-items:
 - Banner*. Use this option to create a new banner.
 - Banner group*. Use this option to create a new banner group.

- *Save*. Use this item to save a banner or banner group.
- *Delete*. Use this item to delete a banner or banner group.
- *Quit*. Use this item to close the modules window.

5.3.2.2 The *Options* menu items

The *Options* drop-down menu has the following items (see Figure 144):

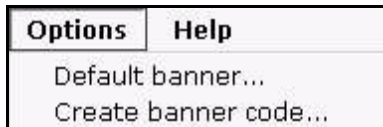


Figure 144 The *Options* menu items

- *Default banner*. Use this option to select a default banner. This banner will be shown if no other banner has been selected.
- *Create Banner Code*. Use this option to create the banner code for non (external) webEdition pages.

5.3.2.3 The *Help* menu items

The *Help* drop-down menu has the following items (see Figure 145):

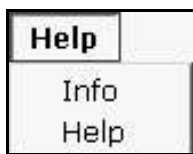


Figure 145 The *Help* sub-menus

- *Info*. This item provides information about the application.
- *Help*. This item provides Help screens.

5.3.3 The banner explorer menu and main page

The banner explorer menu appears on the left side of the screen. It contains a list of your banner files (see Figure 142, "Banner/Statistics Module main screen with Quickstart" on page 143).

The banner main page has three available views, one for *Properties* in which you define your banners, one for *Placement* in which you define on which pages the banner will be shown, and one for *Statistics* in which you can see the views, clicks and click rate for the banner. The banner group main page has only the *Properties* view.

5.3.4 The banner *Properties* view

The *Properties* view allows you to set up your banner files. You can access the *Properties* view by clicking on the *Properties* tab, or by using the *Banner > New > Banner* drop-down menu on the main page. The *Properties* view is divided into three areas: *Path*, *Banner* and *Period*. If you have purchased the webEdition Customer Management Module, a forth area, *Customers*, is also available (see Figure 146).

Figure 146 The *Properties* view

The screenshot shows the 'Banner: /New banner' window with three tabs: 'Properties', 'Placement', and 'Statistics'. The 'Properties' tab is active. It contains several sections:

- Path section:** Includes a 'Name' text field with 'New banner' entered, and a 'Group' dropdown menu with a '/' character. A 'Select' button is next to the group dropdown.
- Banner section:** Includes an 'Image path' text field with a 'Select' button. Below it are radio buttons for 'External URL' (selected) and 'Internal URL'. Each has a corresponding text field and a 'Select' button.
- Settings section:** Includes a checked 'Active' checkbox, 'Maximum views' (10000), 'Maximum clicks' (1000), and 'Weight' (5 (normal) with a dropdown arrow).
- Period section:** Includes a 'Less properties' button and a 'Period' section with 'From' and 'To' date pickers. Both are set to 03/02/2004.
- Customers section:** Includes a text field and 'Delete all' and 'Add' buttons.

5.3.4.1 The *Path* area

The *Path* area has the following functions:

- *Name*. Use this field to give a name to your banner.
- *Group*. Use this field to put the banner in a banner group.

5.3.4.2 The *Banner* area

The *Banner* area has the following functions:

- *Image Path*. Use this field to select a webEdition image which will be used for the banner.
- *External URL*. Use this field to enter a webEdition external URL to which the user will be redirected when clicking the banner.
- *Internal URL*. Use this field to enter a webEdition internal URL to which the user will be redirected when clicking the banner.
- *Active*. When this checkbox is not checked, the banner will never be shown (except if it is defined as a default banner).
- *Maximum views*. Use this field to enter the maximum number of times that the banner will be shown.

- *Maximum clicks*. Use this field to enter the maximum number of clicks. If the value is reached the banner will not be shown anymore.
- *Weight*. Here you can enter the weight of the banner. A higher weight means that the banner will be shown more often than a banner with a lower weight.

5.3.4.3 The *Period* area

The *Period* area has the following functions (click on the *More properties* icon to display the *Period* area):

- *From*. If this checkbox is checked, the banner will be displayed from the entered date.
- *To*. If this checkbox is checked, the banner will be displayed until the entered date.

5.3.4.4 The *Customers* area

The *Customers* area appears under the *Period* area only if you have purchased and installed the webEdition Customer Management Module. Here you can select one or more customers who will be the owner of the banner.

5.3.5 The banner *Placement* view

The *Placement* view allows you to place the banner on different pages (see Figure 147).

Figure 147 The *Placement* view

The screenshot shows the 'Banner: /New banner' window with three tabs: 'Properties', 'Placement', and 'Statistics'. The 'Placement' tab is active. It contains several sections for configuring banner placement:

- Banner name:** A text input field followed by a dropdown menu.
- Pages:** A text input field with 'Delete all' and 'Add' buttons below it.
- Directories:** A text input field with 'Delete all' and 'Add' buttons below it.
- Less properties:** A dropdown menu currently showing a downward arrow.
- Categories:** A text input field with 'Delete all' and 'Add' buttons below it.
- Document types:** A list box containing 'item', 'movieReview', and 'newsArticle'.

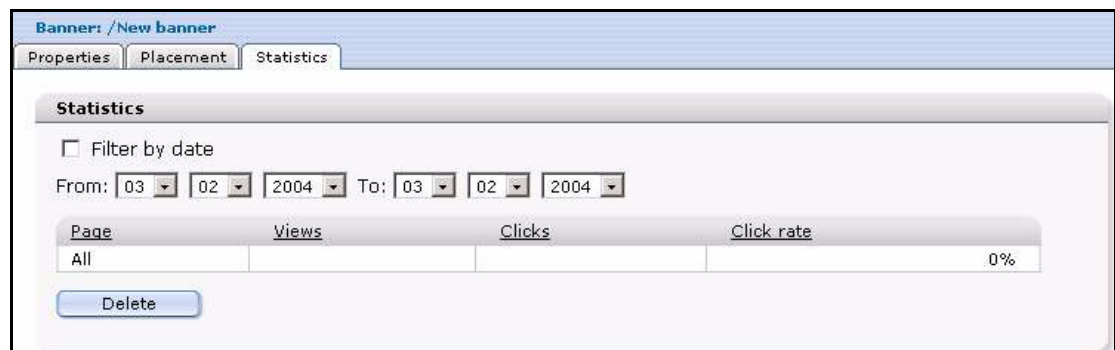
The *Placement* view has the following areas:

- *Banner name*. Use this area to enter the name of the <we:banner> tag where the banner is to be shown. You can choose the available banners from the select box.
- *Pages*. Use this area to select one or more pages on which the banner is to be shown. If one or more pages are set, the banner will only be shown on the page(s) you have specified. Use the *Add* button to access the browse server window, from which you can select a page. Use the *Delete all* button to delete the placement of a banner on all selected pages. Click the trash can icon to delete the placement on a single page.
- *Directories*. Use this area to select (or delete) one or more directories on which the banner is to be shown. The banner will only be shown on pages which resides in the directories you have specified.
- *Categories*. Use this area to select (or delete) one or more categories. The banner will only be shown on pages that belong to the categories you have specified.
- *Document Types*. Use this area to select one or more document types. The banner will only be shown on pages that belong to one of the selected document types.

5.3.6 The banner *Statistics* view

In the *Statistics* view you can see the statistics of a particular banner (see Figure 148):

Figure 148 The *Statistics* view



The checkbox *Filter by date* allows you to select the beginning and the end of a time-span with the fields *from* and *to*.

The *Statistics* view displays a table with the following features:

- *Page*. The first column of the table indicates the page or pages upon which a specified banner appears. The first row of the table shows the summary of all pages.
- *Views*. This column represents the number of times that the page on which the banner appears has been viewed.
- *Clicks*. this column represents the number of times that the banner has been clicked.
- *Click rate*. This column represents the clicks per view, expressed as a percentage.

Note: For more information about filtering and sorting your statistical data, see Section 6.3, "Viewing and sorting banner statistics" on page 155.

5.3.7 The banner group *Properties* view

The *Properties* view allows you to set up your banner groups. You can access the Banner Group *Properties* view by using the *Banner > New > BannerGroup* drop-down menu on the main page. The *Properties* view for a banner group has only the *Path* area. If you have purchased the webEdition Customer Management Module, a second area, *Customers*, is also available (see Figure 149).

Figure 149 The *Properties* view of banner groups

Group: /New banner group

Properties

Properties

Path

Name
New banner group

Group
/ Select

Customers

Delete all Add

The *Path* area has the following functions:

- *Name*. Use this field to give a name to your banner group.
- *Group*. Use this field to put the banner group into another banner group.

The *Customers* part appears only if you have purchased and installed the webEdition Customer Management Module. Here you can select one or more customers who will be the owner of the banner group and the banners the group contains.

6 Creating banners

This chapter describes how you can create and manage banners for your Web site. The following topics are treated in this chapter:

- Section 6.1, "Setting the properties for a banner" on page 149
- Section 6.2, "Placing a banner on a Web page" on page 152
- Section 6.3, "Viewing and sorting banner statistics" on page 155

6.1 Setting the properties for a banner

Use the following procedure to set the properties for a banner.

Procedure 12 Setting the properties for a banner

In the Banner/Statistics Module main screen

- 1 Click *Banner > New > Banner* to manage a new banner.
webEdition opens the *Properties* view (see Figure 150).

Figure 150 Naming a new banner

The screenshot shows a web application window titled "Banner: /New banner". It has three tabs: "Properties", "Placement", and "Statistics". The "Properties" tab is selected and displays a form with the following fields:

- Name:** A text input field containing "webEdition Philosophy".
- Group:** A text input field containing "/".
- Select:** A button located to the right of the Group field.

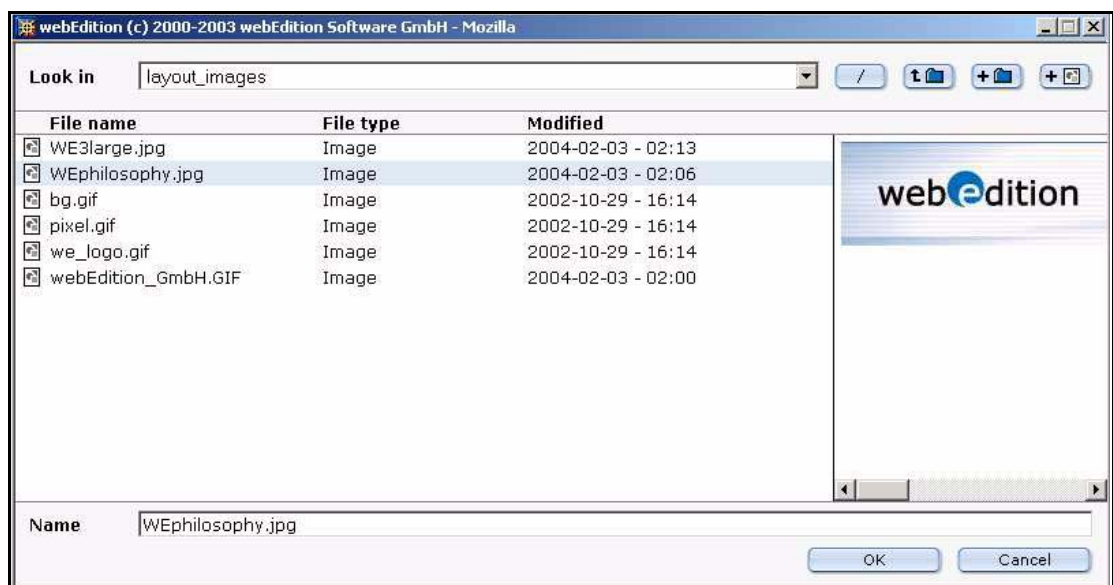
- 2 In the *Path* area of the *Properties* view, type the name of your banner in the *Name* field.
- 3 Choose the group in the *Group* field in which you want to place the banner. (For more information on creating banner groups, see Section 6.4, "Creating banner groups" on page 156).

If you click the *Select* button, a dialog box opens that allows you to browse your system for an existing group. See Figure 151, "Searching and selecting a banner group" on page 150.

Figure 151 Searching and selecting a banner group

- 4 In the *Banner* area of the *Properties* view, enter in the *Image Path* field the directory path to the image file that you want to use as your banner.

If you click the *select* button, a dialog box opens that allows you to browse your system for an existing image (see Figure 152).

Figure 152 Searching and selecting an image

- 5 Select an image from your existing files, and press the OK button.

The name of the image file appears in the Image path field in the Banner area of the Properties view. The image itself appears below the field(see Figure 153).

Figure 153 Banner selection

The screenshot shows a web interface for banner management. At the top, there's a 'Banner' section. Below it, the 'Image path' field contains '/we_demo/layout_images/WEphilosophy.jpg' with a 'Select' button. A preview of the banner image is shown, featuring the 'web edition' logo and the text 'A New Philosophy'. Below the preview, there are two radio buttons: 'External URL' (unselected) and 'Internal URL' (selected). The 'Internal URL' field contains '/we_demo/news/news_cms.html' with a 'Select' button. At the bottom, there's a row of controls: a checked 'Active' checkbox, a 'Maximum views' field with '10000', a 'Maximum clicks' field with '1000', and a 'Weight' dropdown menu set to '5 (normal)'.

- 6 To create a hyperlink from your banner to another page, type the URL of an external Web page in the *External URL* field or select an internal page by clicking the select button next to the *Internal URL* field.

The banner will be linked to the URL you enter. When a visitor clicks on your banner, they will be taken to the designated URL.

- 7 Type the number of times the banner should be shown in the *Maximum views* field.

Note: If the field is not filled, the banner will be shown without limit.

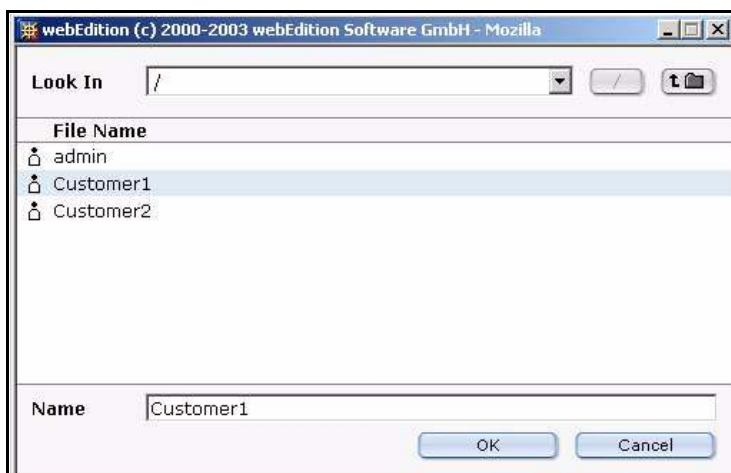
- 8 Type the maximum number of clicks in the *Maximum Clicks* field.

Note: If the field is not filled, the banner can be clicked without limit.

When the banner has been clicked as many times as the entered value, the banner will no longer be displayed.

- 9 Select the weight of the banner in the *Weight* field. A higher weight means that the banner will be displayed more often than a banner with less weight.
- 10 If you want the banner to be shown automatically from a given date, check the *From* checkbox and select the date and time with the date selectors under the *From* checkbox.
- 11 If you check the *To* checkbox, the banner will only be shown until the date entered in the date selectors under the *To* checkbox.
- 12 If you have purchased the webEdition Customer Management Module, you can now select one or more customers by clicking the *add* button in the *Customers* area.

A dialog box opens that allows you to browse your system for an existing customer (see Figure 154).

Figure 154 Searching and selecting a customer

- 13** Press the *ok* button.

The system returns to the Properties view. Notice that the name of the selected customer now appears in the Customers field.

- 14** Save the banner by clicking the *save* button at the bottom of the screen or by selecting the *save* from the banner menu.

The system displays a dialogue box saying that the banner was succesfully saved. Click OK. Thereafter an icon for your new banner appears in the Banner/Statistics Module explorer menu (see Figure 155).

Figure 155 New banner icon in the explorer menu

- 15** You have completed this procedure. If you wish to place your banner on a Web page, go to Section 6.2, "Placing a banner on a Web page" on page 152.

6.2 Placing a banner on a Web page

The webEdition Banner/Statistics Module allows you to place a banner on one or more Web pages.

To display a banner on a Web page, the page must have at least one `<we:banner>` tag or a special HTML banner code for non-webEdition pages. (The `<we:banner>` tag and the special HTML banner code are described in Section 7.1, "What tags are required to display a banner on a webEdition page?" on page 159). Each `<we:banner>` tag has a name attribute which you use to identify the banner.

You can specify exactly what pages are to display a given banner by using the fields in the *Placement* view. These fields act as filters for your selection. You can use one or more filters to refine your selection.

Use the following procedure to place a banner on a Web page.

Procedure 13 Placing a banner on a Web page

In the Banner/Statistics Module main screen

- 1 To access the *Placement* view, click on the *Placement* tab on the Banner/Statistics main screen (see Figure 156).

Figure 156 The banner *Placement* view

- 2 Because webEdition allows you to have more than one `<we:banner>` tag on your template, you must tell the Banner/Statistics Module which of the tags you want to use. You identify the name of the banner by using either the *Banner Name* field (on the left) or the select box with `<we:banner>` tags (on the right). The *Banner Name* field is associated with the name attribute of the `<we:banner>` tag.

- a If you know the name of the tag, type the name directly into the input field (on the left).

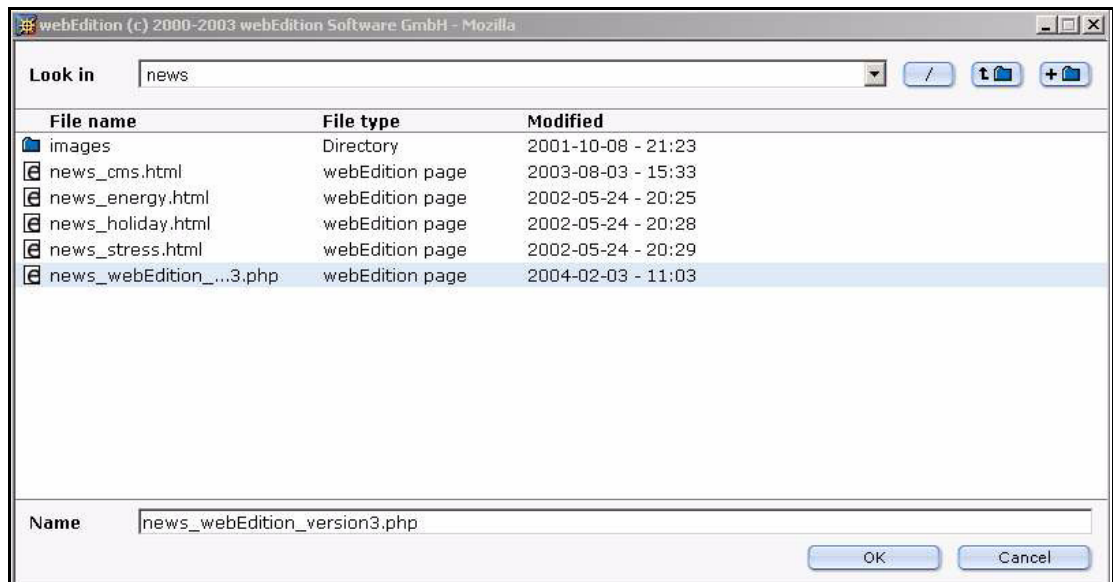
Note: If you want to display the banner on pages that were not produced in webEdition, you must type the name of the banner directly into the text field. The webEdition software cannot display the name in the picklist because no `<we:banner>` tag exists for an external page. For more details on placing a banner on external pages, see Chapter 7, Procedure 15, "Creating banners on external Web pages" on page 161.

- b Choose the `<we:banner>` tag by using the select box (on the right). The select box shows the names of all `<we:banner>` tags which are used in your templates. If you select a tag, its name will be copied in the text field.

Note: If you do not specify a name, the banner will be shown on every page that has a `<we:banner>` tag.

- 3 Identify the pages that are to display the banner. To do so, complete one or all of the following substeps:

- a To place a banner on one or more individual Web pages, use the *Pages* field.
 - i Click on the *add* button to access your list of files.
A dialogue box opens showing your directories from which you can choose your file (see Figure 157).
 - ii Select the target page(s) on which the banner is to appear.

Figure 157 Selecting a target page for your banner

- iii Press the *OK* button.
The name of the target page appears in the Pages area of the Placement view (see Figure 158).

Figure 158 Target page selected

- b To place a banner on all pages in one or more directories, use the *Directories* field.
 - i Click on the *add* button to access your list of directories.
A dialogue box opens showing your directories.
 - ii Select the directory that stores the pages in which the banner is to appear.
 - iii Press the *OK* button.
The banner will only be shown on pages which are stored in the specified directories.
- c To place a banner on all pages assigned to one or more categories, use the *Categories* field.
 - i Click on the *add* button to access your list of categories.

A dialogue box opens showing the categories you have defined.

- ii Select the category associated with the pages in which the banner is to appear.
- iii Press the *OK* button.

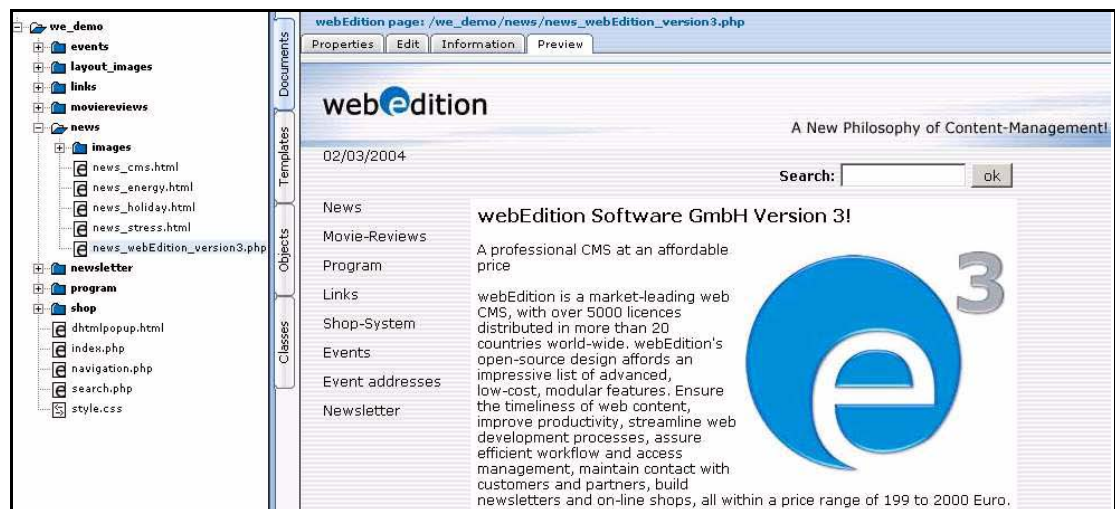
The banner will only be shown on pages which are associated with the specified categories.

- d To place a banner on all pages assigned to one or more document types, use the *Document types* pick list.
 - i Click on the item in the pick list that represents the document type with which your target pages are associated.

The banner will only be shown on pages which are associated with the specified document types.

- 4 Click the *Save* button at the bottom of the *Placement* page to save your selections.
- 5 Verify that your banner has been properly placed on your designated Web page. (To do so you must leave the Banner/Statistics module and go to the webEdition main screen.)
 - a Go to the webEdition main screen.
 - b In the explorer menu, click on the file that you associated with the banner in Step 3 on page 153.
 - c Select the *Preview* tab to display your Web page (see Figure 159).

Figure 159 Verifying your banner placement



- 6 You have completed this procedure.

6.3 Viewing and sorting banner statistics

The webEdition Banner/Statistics Module allows you to see the statistics about a banner and every Web page on which that banner appears. To access the *Statistics* view, click on the *Statistics* tab on the main page (see Figure 160).

Figure 160 The banner Statistics view

Statistics

☐ Filter by date

From: 03/02/2004 To: 03/02/2004

Page	Views	Clicks	Click rate
All			0%

Delete

The Statistics view displays a table which shows the *Views*, *Clicks* and *Click rate* for the banner. The first row of the table shows the summary of all pages. The following rows show the statistics for each page displaying the banner.

6.3.1 Sorting statistics

You can sort the table by clicking the headline of a column. A second click sorts the table in descending order. If the checkbox *Filter by date* is checked, you can select the beginning and the end of a span with the fields *from* and *to*. The statistics for this span will be shown. If you want to delete (reset) the statistics data, you can do this by clicking the *delete* button.

6.4 Creating banner groups

Banner groups are designed to allow you to manage your banners.

Procedure 14 Creating a banner group

In the Banner/Statistics Module main screen

- 1 Click *Banner > New > Banner group*.
webEdition opens the *Properties* view (see).

Figure 161 The New Banner Properties view

Properties

Path

Name
New Banner Group2

Group
/

Select

Customers

Delete all Add

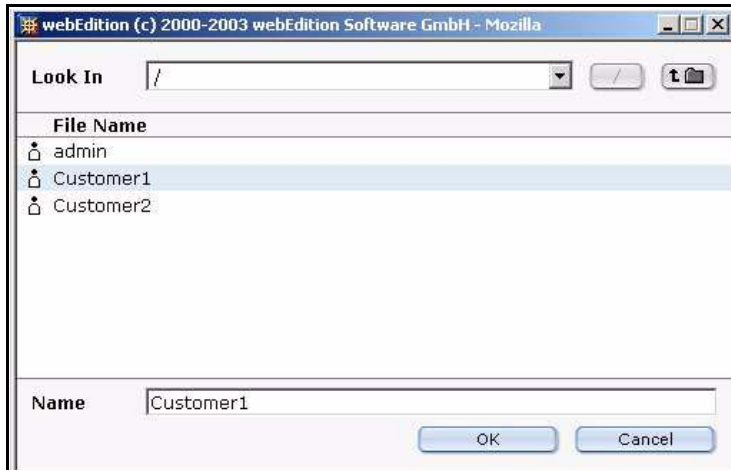
- 2 In the *Path* area of the banner group *Properties* view, type the name of your banner group in the *Name* field.
- 3 If you wish to create a subgroup, you can choose an existing group in the *Group* field by clicking the *Select* button.

If you click the *Select* button, a dialog box opens that allows you to browse your system for an existing group.

- 4 If you have purchased the webEdition Customer Management Module, you can now select one or more customers by clicking the *add* button in the *Customers* area.

A dialog box opens that allows you to browse your system for an existing customer (see Figure 154).

Figure 162 Searching and selecting a customer



- 5 Press the *ok* button.

The system returns to the Properties view. Notice that the name of the selected customer now appears in the Customers field.

- 6 Save the banner group by clicking the *Save* button at the bottom of the screen or by selecting the *Save* from the banner menu.

The system displays a dialogue box saying that the banner group was successfully saved.

- 7 Click *OK* to close the dialogue box.

An icon for your new banner group appears in the banner explorer menu.

Figure 163 new banner group icon



- 8 You have completed this procedure.

7 Practical examples for template developers

This chapter provides a variety of scripts and examples designed to assist administrators in developing webEdition code for the banner templates.

This chapter treats items such as how to

- use <we:banner> tags
- use JavaScript or iframe banners
- display banners on non-webEdition pages
- gather statistics about your pages—whether with or without banners
- use the Customer Management Module to provide banner statistics for customers.

7.1 What tags are required to display a banner on a webEdition page?

To display a banner on a webEdition page, the template of the page needs to have a <we:banner> tag. You can have more than one <we:banner> tag in your template, but each tag must have a different name. For example:

```
<we:banner name="banner1" /><br>
<we:banner name="banner2" />
```

7.2 What format is used to display banners?

There are two ways to display a banner:

- Displaying a banner with JavaScript
- Displaying a banner in an iframe

7.2.1 Displaying a banner with JavaScript

JavaScript is the default setting for all banners if you do not set the type attribute in the <we:banner> tag. Banners will be displayed using JavaScript when the Web page is static. If JavaScript is disabled in the browser, the banner will be displayed as normal HTML (with an <a> and an tag). The browser uses a cookie to store the reference for the previously shown banner so that a user will be redirected to the correct page when clicking on the banner.

If the Web page is dynamic, the banner is displayed as normal HTML (with an <a> and an tag). The reference for the banner will be passed with the URL. For example:

```
<we:banner name="banner1" type="js" /> or
```

```
<we:banner name="banner1"/>
```

7.2.2 Displaying a banner in an iframe

You can display a banner using an `iframe` (or an `ilayer` in Netscape 4). On browsers that cannot understand an `iframe` or `ilayer`, the banner will be displayed as normal HTML (with an `<a>` and an `` tag). The browser uses a cookie to store the reference for the banner so that a user will be redirected to the correct page when clicking on the banner. For example:

```
<we:banner name="banner1" type="iframe"/>
```

7.3 How can I display specific banners on a page?

To show one or more specific banners on a page, you can write the banner paths separated by a comma in the `paths` attribute of the `<we:banner>` tag. You can also write the path of a banner group to display the banners of that group. For example:

```
<we:banner name="banner1"
paths="/banner1,/group1/banner2,/group2"/>
```

7.4 How can I display a banner without a link?

To show a banner without a link, you can add the `link` attribute to the `<we:banner>` tag and set its value to `false`. For example:

```
<we:banner name="banner1" link="false"/>
```

7.5 How can I use files other than `/webEdition/getBanner.php` and `/webEdition/bannerclick.php`?

Normally `webEdition` uses the file `/webEdition/getBanner.php` as the `src` attribute for the `` and `<iframe>` tag and the file `/webEdition/bannerclick.php` for the `href` attribute of the `<a>` tag. If you want to protect the `webEdition` directory with an `htaccess` password, or if you do not want to use the original scripts, you can make two php scripts (external or as internal HTML page with extension `.php`), which include the appropriate file. In this case, the path of the scripts has to be entered in the attributes `getscript` and `clickscript` of the `<we:banner>` tag. For example:

```
<we:banner name="banner1" getscript="/get.php"
clickscript="/click.php"/>
```

The code of the two scripts must look like the following example:

```
get.php:
<?php
include($_SERVER["DOCUMENT_ROOT"]."/webEdition/getBanner.php"); ?>

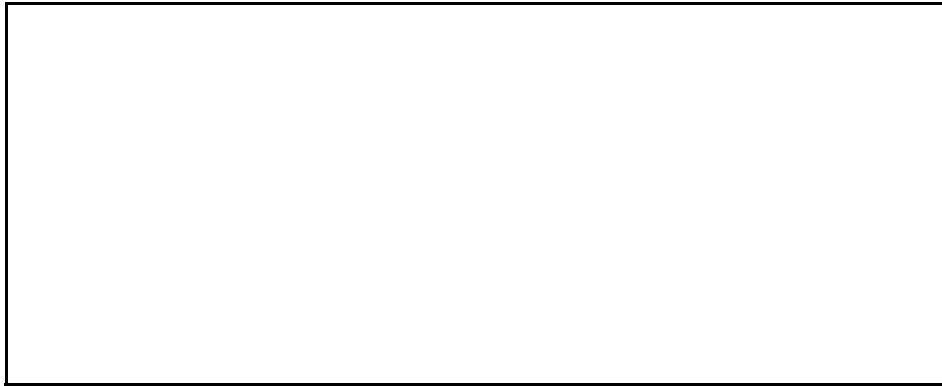
click.php:
<?php
include($_SERVER["DOCUMENT_ROOT"]."/webEdition/bannerclick.php");
?>
```

7.6 How can I display webEdition banners on external Web pages?

With `webEdition` you can display banners on pages which were not made with `webEdition`—here referred to as "external Web pages"—such as sites on another domain. To do so, you have to insert a special piece of code in the page on which you want to display the banners. The required code can be created in `webEdition` by using the following procedure:

Procedure 15 Creating banners on external Web pages***In the Banner/Statistics Module main screen***

- 1 Click on *Options > Create banner code* to open the code generation wizard (see Figure 164).

Figure 164 Creating banner code for external Web pages

- 2 In the *Type* select box, choose to use either a JavaScript or an iframe to display the banner.
- 3 Type a banner name in the *Banner Name* field. This field is similar to the name attribute of the `<we:banner>` tag.
- 4 In the *URL of Page* field (for example, `http://www.webedition.biz/index.html`), type the URL of the page where the banner should be displayed.
- 5 Type the target of the banner link in the *Target* field. If you leave the field empty, the next page will open in the same window when the banner is clicked. This field is similar to the target attribute of the `<we:banner>` tag.
- 6 Specify the width and the height of the banner in the *Width* and *Height* fields. These fields are similar to the width and height attributes of the `<we:banner>` tag.
- 7 If you want to show one or more specific banners on a page, you can write the banner paths, separated by a comma, in the *Banner Paths* field. You can also write the path of a banner group to display the banners of that group. This field is similar to the *paths* attribute of the `<we:banner>` tag. (See also Section 7.3, "How can I display specific banners on a page?" on page 160.)
- 8 If you want to use scripts other than the normal webEdition *get* and *click* scripts, you can type the URLs of the scripts in the fields *Get Script* and *Click Script*. These fields are similar to the *getscript* and *clickscript* attribute of the `<we:banner>` tag. (See also Section 7.5, "How can I use files other than `/webEdition/getBanner.php` and `/webEdition/bannerclick.php`?" on page 160.)
- 9 Click the *ok* button.
A text area with the created code will be displayed.
- 10 Copy and paste the code from Step 9 onto your Web page where the banner should be shown.
- 11 Close the window by clicking the *close* button.
- 12 You have completed this procedure.

7.7 How can I use the Banner/Statistics Module to gather statistics about pages that do not display a banner?

You can also use the Banner/Statistics Module to gather statistics that indicate the number of times your pages have been viewed. In this case you do not need to display a banner. The following procedure will help you to enable the statistics gathering feature of the module:

Procedure 16 Gathering statistic about your site

- 1 Insert a `<we:banner>` tag into your template(s). Give the tag an appropriate name (such as, "stat") and set the type to "pixel". For example:

```
<we:banner name="stat" type="pixel"/>
```
- 2 Create a banner using a transparent .gif as its image. (For information on creating banners, see Chapter 6, "Creating banners" on page 149.
- 3 Type the name you entered in Step 1 in the *Banner Name* field in the *Placement* area. In the example in Step 1, "stat" is the name of the banner.
- 4 You have finished this procedure. To view the statistics for the banner you have created, go to the *Statistics* area by clicking on the *Statistics* tab.

7.8 How can I provide banner statistics for my customers?

If you have purchased the webEdition Customer Management Module, you can create a statistics page that only displays the statistics of the banners which are owned by the logged in customer. You create a statistics page using the `<we:listview type="banner">` tag in combination with the `<we:bannerSelect>` tag. For a detailed description of these we:tags, see "The webEdition Tag-Reference" at the following URL:
<http://tags.webedition.de/index.html?go=TagReference&Language=en>.

The following example shows how you can provide statistics for your customers:

```
<we:form id="self" method="get">
<we:processDateSelect name="from"/>
<we:processDateSelect name="to" endofday="true"/>
<we:setVar to="global" nameto="filter" from="request"
namefrom="filter"/>
<input
type="checkbox"
name="filter"
value="true"
<we:ifVarNotEmpty match="filter" type="global">
checked
</we:ifVarNotEmpty>
> Filter<br>
<we:dateSelect name="from" class="normal"/><br>
<we:dateSelect name="to" class="normal"/><br>
<we:bannerSelect customer="true" name="bannerpath" showpath="true"
firstentry="Please select a banner"/>
<input type="submit">
<we:listview type="banner" customer="true" path="\$bannerpath"
rows="10"
order="views desc" usefilter="\$filter" filterdatestart="\$from"
filterdateend="\$to">
<table cellpadding="0" cellspacing="0" border="0" width="400">
  <tr>
    <td>Path</td>
    <td>Shown</td>
    <td>Clicked</td>
    <td>Rate</td>
  </tr>
  <tr>
    <td>all</td>
    <td><we:bannerSum type="views"/></td>
    <td><we:bannerSum type="clicks"/></td>
    <td><we:bannerSum type="rate"/></td>
  </tr>
<we:repeat>
  <tr>
    <td><we:field name="path"></td>
```

[illegible]

8 Customer Management: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Customer Management and Customer Management PRO Modules. This chapter treats what the modules do and how to install them. You can also find information here about the basic layout and command features for the Customer Management Module. These topics are treated in the following sections:

- Section 8.1, "What is the webEdition Customer Management Module?" on page 165
- Section 8.2, "Installation" on page 165
- Section 8.3, "General information and navigation" on page 166

The PRO Module builds upon the standard Customer Management Module and therefore the information in this book pertains to both webEdition applications. Supplementary material describing the particular features of the Customer Management PRO Module is found in Chapter 9, "The Customer Management PRO Module" on page 171.

8.1 What is the webEdition Customer Management Module?

The webEdition Customer Management Module is a database that allows you to register and manage external visitors to your web site. (These visitors are called "customers" in this document.) The Customer Management Module can manage customer data in two ways:

- You can enter customer data manually yourself.
- With the help of a registration form that you have designed for your Web site, customers can enter their data themselves. In this case, customers will log in by entering their user name and password. This feature allows you to offer registered customers an extended selection of information or give them access to areas from which non-registered users are barred.

8.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

8.3 General information and navigation

After installation, you will find a new menu item in the main menu called *Modules*, which contains all the modules in your installation of webEdition (see Figure 165).

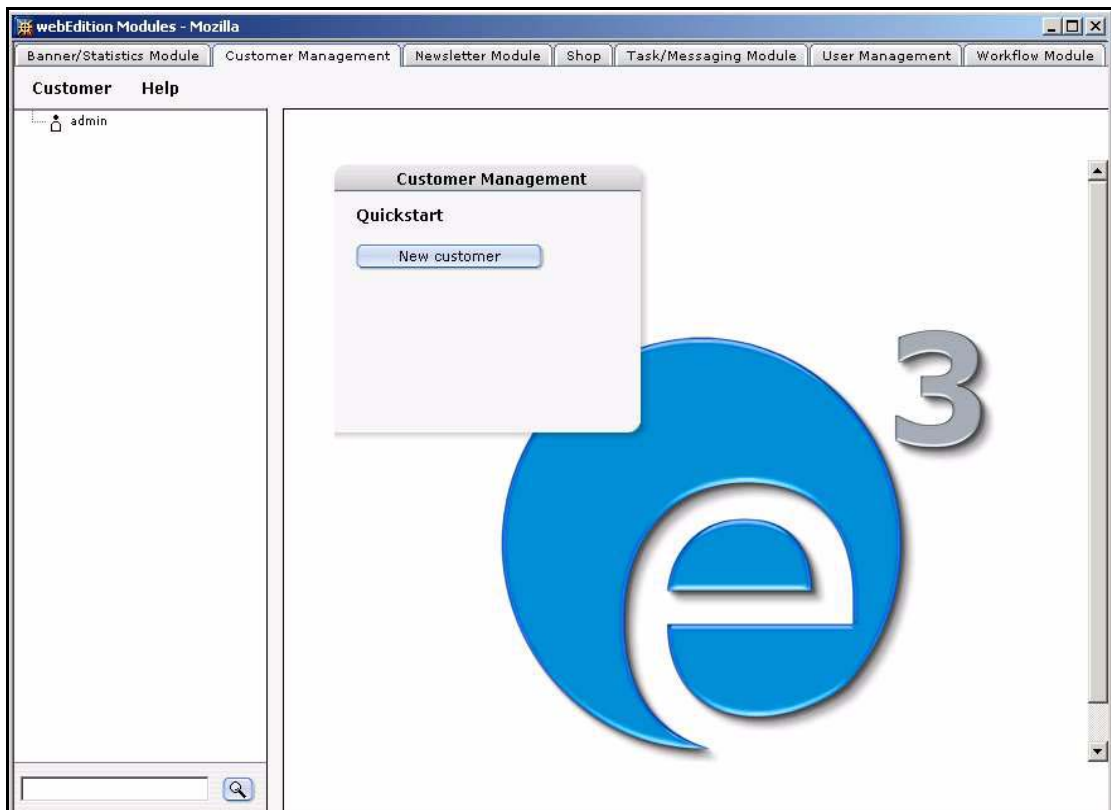
Figure 165 Modules drop-down menu



8.3.1 Opening the module

To open the module, select *Customer Management* from the *Modules* drop-down menu on the webEdition main screen. The Customer Management Quickstart screen opens as seen in Figure 166.

Figure 166 Customer Management Module: mainscreen with Quickstart option



Using the *Quickstart* screen, you have the option of going directly to a new customer configuration screen.

8.3.1.1 Customer Management explorer menu

The explorer menu displays a list of icons representing the customer data you have in your customer database (see Figure 167). You can access and modify the profile for a particular customer by double clicking on the icon for that customer.

Figure 167 Customer Management explorer menu



8.3.1.2 Permissions to modify the customer database

The default user has all of the permissions to create, modify and delete the data and data fields in the Customer Management database. Additional flexibility is available with the User Management Modules.

8.3.1.2.1 Interaction with the User Management Modules If the Standard User Management Module is installed, permission to set up new customers (registered visitors to your site), or to modify the fields in the customer database are limited to the administrator. If you have installed the User Management PRO Module, the administrator can assign to any user the permission to create, delete, edit customer or edit customer fields. For more information on the User Management Module, see the *User Management Module User Guide* from the webEdition web site.

8.3.2 The Customer Management menus

The Customer Management Module main screen (as seen in Figure 166, "Customer Management Module: mainscreen with Quickstart option" on page 166) has two drop-down menus: *Customer* and *Help*, each of which is described in the subsections that follow.

8.3.2.1 The *Customer* drop-down menu

The Customer drop-down menu has the following items (see Figure 168, "Customer drop-down menu" on page 167):



Figure 168 Customer drop-down menu

- *New*. This option opens a window that allows you to enter data about a new customer.
- *Save*. Use this command to save your data.
- *Delete*. Use this command to delete your data.

- *Administration > Fields administration*. This item opens a window that allows you to modify the database parameters used to define your customers.
- *End*. Use this command to exit the application.

If you have installed the Customer Management PRO Module, you will see additional items in the *Customer* menu. For details, see Chapter 9, "The Customer Management PRO Module" on page 171.

8.3.2.2 The *Help* drop-down menu

The *Help* drop-down menu has the following items (see Figure 169, "Help pull-down menu" on page 168):



Figure 169 *Help* pull-down menu

- *Info*. This command provides information about the application.
- *Help*. This command gives you access to the webEdition help system.

8.3.3 About fields and views in the customer database

You can use the customer database to store and maintain all of your data about your customers. Typically such a database would include information under such categories as customer name, E-mail address, street address, telephone number, etc.

8.3.3.1 About views

The webEdition Customer Management Module software is pre-programmed to provide you with the following default categories, which are displayed in the module's interface in the following views: *General*, *Other*, and *All*. You are not limited to the foregoing default settings. You can modify the database to meet your own needs by adding new types of information. You can add, for example, a view for a salutation or contact information (see Section 10.4, "Working with customized views" on page 181). In this manner you are free to customize the database to meet the needs of your business or organization.

8.3.3.1.1 The *General* view The *General* view provides the basic interface to your customer database. You use this view to enter user data about a new customer.

Select *Customer > New* from the Customer Management Module menu to access the default *General* view (see Figure 170):

The *General* view has the following fields, each of which allows you to enter a customer's basic data:

Figure 170 *General* view

- *Username*
- *Password*
- *Forename*
- *Surname*
- *Member since*. This is a read only-field which tells you the date and time the

user was created in the system.

- *Last login*. This is a read only-field which tells you the date and time the user was last logged into the system.
- *Last access*. This is a read only-field which tells you the date and time the user last accessed data from the system.

8.3.3.1.2 Other view This view is included so that you can add miscellaneous field types to a default view without having to create additional views.

8.3.3.1.3 All view This view displays all your views in succession.

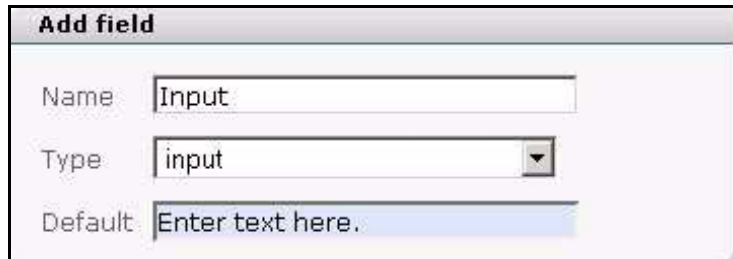
8.3.3.2 About fields

Within each of these categories (views) are the data fields which contain specific information about your customer. You can customize these fields to meet your own needs. You have the option of expanding all fields and views (with the exception of the *General* data). You can give names to your field, define the field type, and assign default values to those fields. (These activities can be performed using the *Fields administration* command, which is discussed in detail in Section 10.3, "Working with fields in the customer database" on page 178).

8.3.3.2.1 Field types There are five default field types from which you can choose. Each can be assigned default values:

- *input*. This field type creates a text input field suitable for short text entries. You can enter a default value in the *Default* field.

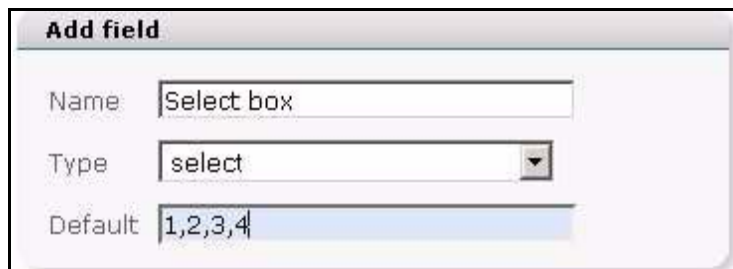
Figure 171 Input text field



The screenshot shows a dialog box titled "Add field". It contains three input fields: "Name" with the text "Input", "Type" with a dropdown menu showing "input", and "Default" with the text "Enter text here.".

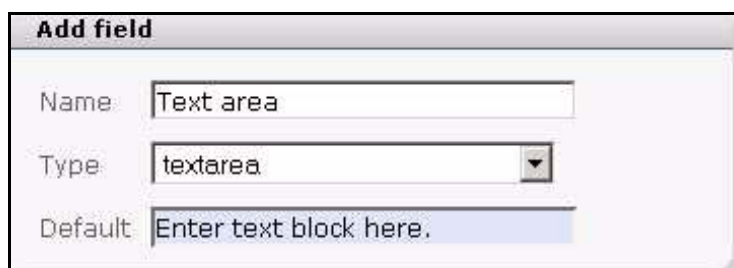
- *select*. This field type creates a select box. The default values that you enter in the *Default* field must be separated by a comma. Each of the comma-separated values will appear as an item in your select list.

Figure 172 select field type



The screenshot shows a dialog box titled "Add field". It contains three input fields: "Name" with the text "Select box", "Type" with a dropdown menu showing "select", and "Default" with the text "1,2,3,4".

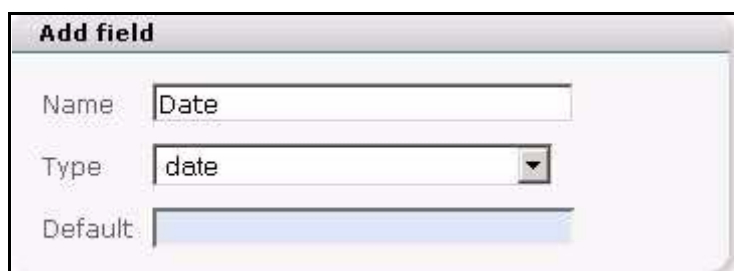
- *textarea*. This field type creates a box in which text can be written.

Figure 173 text area field type

The 'Add field' dialog box shows the configuration for a text area field. The 'Name' field contains 'Text area', the 'Type' dropdown is set to 'textarea', and the 'Default' text area contains the placeholder text 'Enter text block here.'.

Add field	
Name	Text area
Type	textarea
Default	Enter text block here.

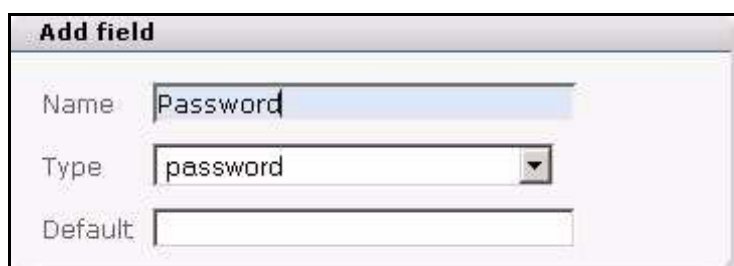
- *date*. This field type creates date and time select boxes.

Figure 174 Date field type

The 'Add field' dialog box shows the configuration for a date field. The 'Name' field contains 'Date', the 'Type' dropdown is set to 'date', and the 'Default' field is empty.

Add field	
Name	Date
Type	date
Default	

- *password*. This field type creates a text input box. For reasons of security, characters typed by a user in this field are masked.

Figure 175 Password field type

The 'Add field' dialog box shows the configuration for a password field. The 'Name' field contains 'Password', the 'Type' dropdown is set to 'password', and the 'Default' field is empty.

Add field	
Name	Password
Type	password
Default	

9 The Customer Management PRO Module

The webEdition Customer Management PRO Module builds upon the standard Customer Management Module. The information in this book pertains to both of these webEdition applications (thus users of the PRO module must read the previous chapters of this manual for basic information about the features in the standard Customer Management Module). This chapter provides supplementary material describing the particular features of the Customer Management PRO Module.

9.1 What is the webEdition Customer Management PRO Module?

The Customer Management PRO Module allows you to perform all of the same functions as the Customer Management Module. In addition to the basic functions, the PRO module gives you enhanced abilities to manage your database by allowing you to:

- Sort your customers
- Search for customers

9.2 General information and navigation

After installation, you will find a new menu item in the webEdition main screen called *Modules*, which contains all the modules in your installation of webEdition (see Figure 176).

Figure 176 Modules drop-down menu

Modules	Help
Banner/Statistics Module...	
Customer Management...	
Database/Object Module...	
Newsletter Module...	
Scheduler...	
Shop...	
Task/Messaging Module...	
User Management...	
Workflow Module...	
Editor Plug-in...	
Module Installation...	

9.2.1 Customer Management PRO explorer menu

Like the standard Customer Management Module, the explorer menu in the PRO Module displays a list of icons representing the customer data you have in your customer database. There are two additional features visible in the PRO Module explorer menu (see Figure 177):

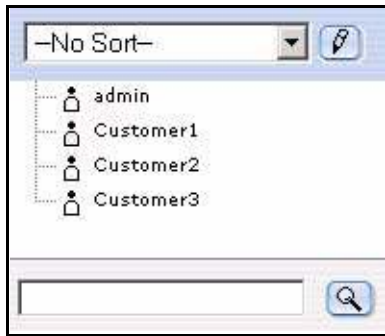


Figure 177 Customer Management PRO explorer menu

• **Sort feature.** At the top of the explorer menu is the sort feature. The sort feature has a select box where you can choose from your defined sort profiles, and a pencil icon where you can create and/or edit the your parameters for your existing sort profiles.

• **Search feature.** At the bottom of the explorer menu is the search feature which consists of a search field, and a search icon.

9.2.2 The *Customer* drop-down menu

Click on *Modules > Customer management* to open the Customer Management Module main screen (see Figure 178).

Figure 178 Customer Management main screen



In addition to those items described in Section 8.3.2.1, "The Customer drop-down menu" on page 167, The *Customer* menu in the PRO Module has the following items (see Figure 179):

- *Administration.* The PRO Module offers two administrative features.
 - *Fields administration.*
 - *Sort administration.*
- *Search.* Use this item to access the module's search engine
- *Settings.* This item allows you to set your default sort view and your Start year for date sorting.

Figure 179 Customer drop-down menu in the PRO Module

9.2.3 Using the Search function

The Customer Management PRO Module offers advanced search capabilities, allowing you to find and manage the data for your customers.

You can access the search feature in the following ways:

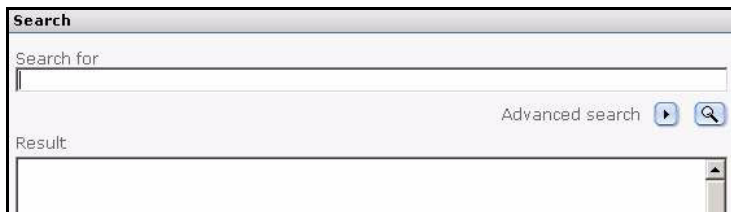
- Click on *Customer > Search*
- Use the simple search option at the bottom of the explorer menu.

Procedure 17 Using the search feature

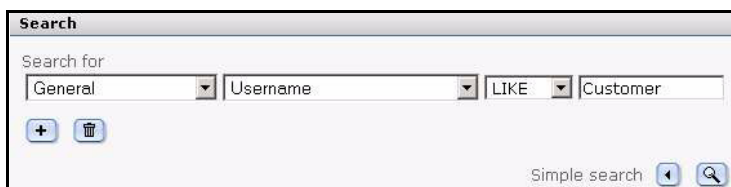
In the Customer Management Module main screen

- 1 Click on *Customer > Search* or enter a name for a customer in the search field at the bottom of the explorer menu and click the search icon (represented by a magnifying glass).

The Search window opens (see Figure 180).

Figure 180 Search window

- 2 Two types of searches are possible. Do one of the following steps:
 - a *Simple search.*
To perform a simple search, enter the text string in the *Search for* field.
 - b *Advanced search.*
 - i Click the right arrow icon beside *Advanced search*.
The Advanced search fields appear as seen in Figure 181.

Figure 181 Advanced search

- ii Select your search parameters from the select boxes.
 - In the first select box, choose one of the views that you have defined.
 - In the second select box, choose from the fields that you have defined within the view.

- In the third select box, choose a search operator.
 - Enter a parameter in the text field.
- 3 Click the search icon (magnifying glass).
- If the system finds a match for your search, the item will appear in the Result box (see Figure 182).*

Figure 182 The Search Result box

- 4 To access or edit the data for an item found in the *Search Result* box, double click on the item.
- webEdition opens the editing area for the customer, where you can modify the data in the General, Other and All views, and also those additional views (such as Salutation or Contact) that you have created.*
- 5 You have completed this procedure.

9.2.4 Using the Sort function

The Customer Management PRO Module offers advanced sorting capabilities, allowing you to create and save multiple sort profiles so that you can manage the data for your customers.

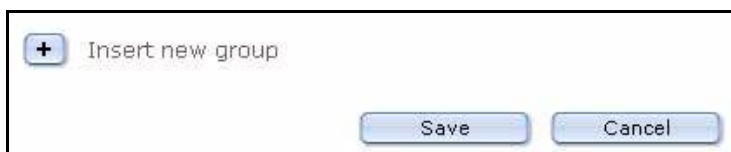
You access the sort feature by selecting an item from the sort select box at the top of the explorer menu. You can edit your sort parameters by clicking the edit (pencil) icon adjacent to the sort select box, or by clicking *Customer > Administration > Sort administration*.

Note: The first time you log in to the system, there are no sort parameters defined. The select box has —No Sort—.

Procedure 18 Using the sort feature

In the Customer Management Module main screen

- 1 Click *Customer > Administration > Sort administration*.
- The Sort administration screen opens. The first time that you use this feature, the system displays a plus icon.*

Figure 183 Sort administration screen

- 2 Click on the plus (+) icon to activate *Insert new group*.
- The Sort area opens (see Figure 184).*

Figure 184 Sort area

sort0

Name

View	Field	Function	Order

+ (plus icon)

Insert new group (+ icon)

Save Cancel

- 3 Type a name to identify your sort group in the *Name* field.
- 4 Click the plus (+) icon to add your sort parameters. Choose the sort parameters in accordance with the way you wish to arrange and access your customer data. There are four areas, each is represented by a select box. The views, fields and functions that are available are determined by the views and fields that you have defined for your Customer Management database (see Section 10.4.1, "Creating a new view" on page 181).
 - a *View*. Sort according to view.
 - b *Field*. The available fields are determined by the view you have chosen.
 - c *Function*. The available functions vary depending on the field type that characterises the field you have chosen. For example text, can be sorted by alphabetical order; dates by day, month, year (etc.).
 - d *Order*. Use this command to choose to display your sort results in ascending (ASC) and descending (DESC) order.

Figure 185 Sort parameters selected

sort1

Name

View	Field	Function	Order
General	Username	ALPH1	DESC

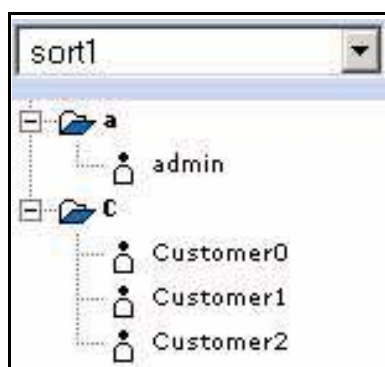
+ (plus icon)

Insert new group (+ icon)

Save Cancel

- 5 Click Save.
The system shows you a confirmation message.
- 6 Click OK.
The sort group you have created appears in the sort select box in the explorer menu.
- 7 Click on your newly created sort group.
Your customers appear in folders that conform to the parameters you have set.

Figure 186 New sort group



8 You have completed this procedure.

10 Using the customer database

This chapter describes how to use the Customer Management and Customer Management PRO Modules to create and manage a customer database. This chapter describes how to modify the database to meet the needs of your business or organization by adding new fields and views to accomodate different types of customer information.

This chapter describes how to work with the customer database under the following sections:

- Section 10.1, "Creating a new customer using the Customer Management Module" on page 177
- Section 10.2, "Modifying customer data" on page 178
- Section 10.3, "Working with fields in the customer database" on page 178
- Section 10.4, "Working with customized views" on page 181

10.1 Creating a new customer using the Customer Management Module

Use the following procedure to create a new customer.

Procedure 19 Creating a new customer

In the Customer Management Module main screen

- 1 Click *Customer > New*.

The system opens the General view , where you can enter basic data about your customer (see Figure 187).

Figure 187 New customer: General view

Customer:	
General	Salutation Contact Other All
General	
Data	
Username	Password
Customer2	*****
Forename	Surname
Mary	Smith
Member since	Last login
2004-02-04 - 00:06	-
Last access	

- 2 Enter all the customer data in the prescribed fields.
- 3 Save the data by clicking on the Save button at the bottom of the page.

webEdition confirms that the customer data was saved. Click OK. An icon representing the newly created customer appears in the explorer menu. The customer can now log onto the home page using the login you have assigned.

Figure 188 New customer icon in the explorer menu



Note: To find out how to create the login mask, go to our documentation page at <http://www.webedition.de/english/downloads/Documentation.html>, and consult the publication titled *The webEdition User Guide*.

- 4 You have completed this procedure.

10.2 Modifying customer data

You can modify the data for a customer by double clicking the icon listed in the explorer menu that signifies your customer. Thereafter, you can toggle among the tabs on the main screen to add or access information about the customer.

10.3 Working with fields in the customer database

The Customer Management Module allows you to change fields using the *Fields administration* feature. The following sections describe procedures for working with fields.

10.3.1 Adding fields to the customer database

The following procedure shows you how to add new field names to the default customer management database so that you can customize it for your own needs.

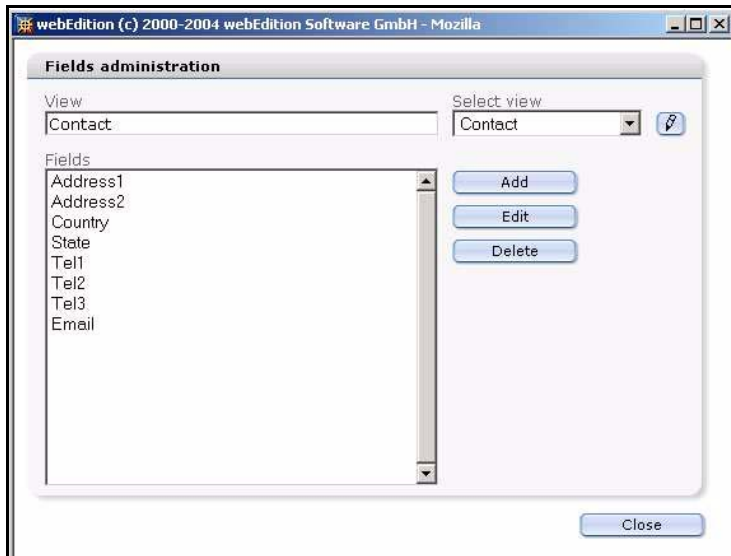
ATTENTION

Once you insert (or delete) field names, they will be accessible (or deleted) for all customers.

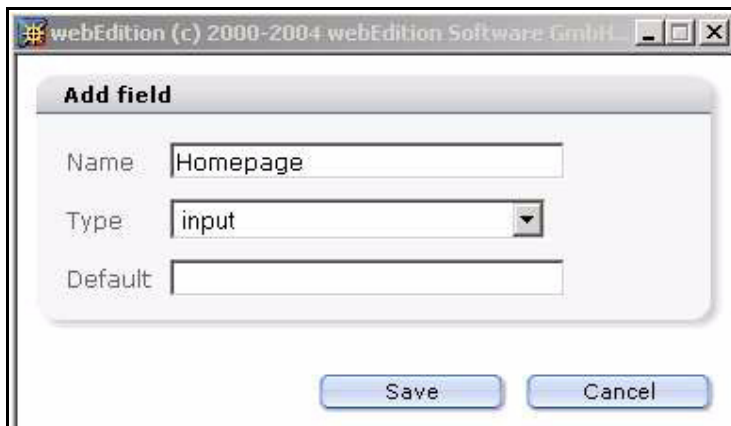
Procedure 20 Adding field names to the default customer database

In the Customer Management Module main screen

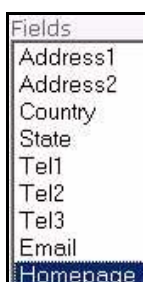
- 1 Click *Customer > Administration > Fields administration*.
The Fields administration screen opens (see Figure 189).

Figure 189 Fields administration screen

- 2 You must associate a field with an existing view. Use the *Select view* select box to choose a view. (If you wish to create a new view first, see Section 10.4, "Working with customized views" on page 181).
- 3 Click the *Add* button adjacent to the *Fields* area.
The Add field dialogue box appears.

Figure 190 Add field dialogue box

- 4 Enter a field name, select a field type from the select box, and enter a default value. (For information about field types, see Section 8.3.3.2.1, "Field types" on page 169).
- 5 Click on the *Save* button.
The new field appears in the Fields list on the Fields administration screen.

Figure 191 New customer field

- 6 You have completed this procedure.

10.3.2 Modifying fields in the customer database

Procedure 21 Changing the properties of a field

In the Customer Management Module main screen

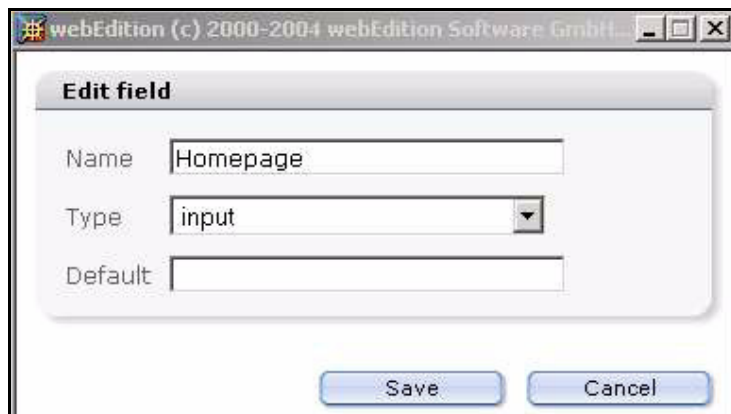
- 1 Click *Customer > Administration > Fields administration*.

The Fields administration screen opens (see Figure 189, "Fields administration screen" on page 179).

- 2 Use the *Select view* select box to choose the view which has the field you wish to change.
- 3 In the *Fields* area, highlight the name of the field you wish to change. See, for example, Figure 191, "New customer field" on page 179.
- 4 Click the *Edit* button adjacent to the *Fields* area.

The Edit field dialogue box appears.

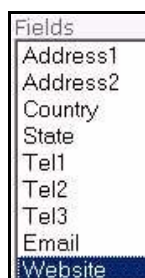
Figure 192 *Edit field dialogue box*



- 5 Change a field name, field type or default value.
- 6 Click on the *Save* button.

The modified field appears in the Fields area on the Fields administration screen.

Figure 193 *Edited customer field*



Fields
Address1
Address2
Country
State
Tel1
Tel2
Tel3
Email
Website

- 7 You have completed this procedure.

10.3.3 Deleting a field

Procedure 22 Deleting the name of a view

In the Customer Management Module main screen

- 1 Click *Customer > Administration > Fields administration*.

The Fields administration screen opens (see Figure 189, "Fields administration screen" on page 179).

- 2 Use the *Select view* select box to choose the view which has the field you wish to change.
- 3 In the *Fields* area, highlight the name of the field you wish to delete.
- 4 Click the *Delete* button.

webEdition asks you if you want to delete the chosen field.

- 5 Click the *OK* button to delete the field(s).
The system confirms the action. Click the OK button again.

Note: *If you delete the last field in a selected view, you will also delete the view.*

- 6 Click on the *Close* button.
- 7 You have completed this procedure.

10.4 Working with customized views

The Customer Management Module allows you to manage field types arranged in views. Using the *Fields administration* feature, you can create new views and new fields for each view. The following views are predefined and cannot be changed or deleted: *General*, *Other*, *All*.

10.4.1 Creating a new view

Procedure 23 Creating a new view

In the Customer Management Module main screen

- 1 Click *Customer > Administration > Fields administration*.

The Fields administration screen opens (see Figure 189, "Fields administration screen" on page 179).

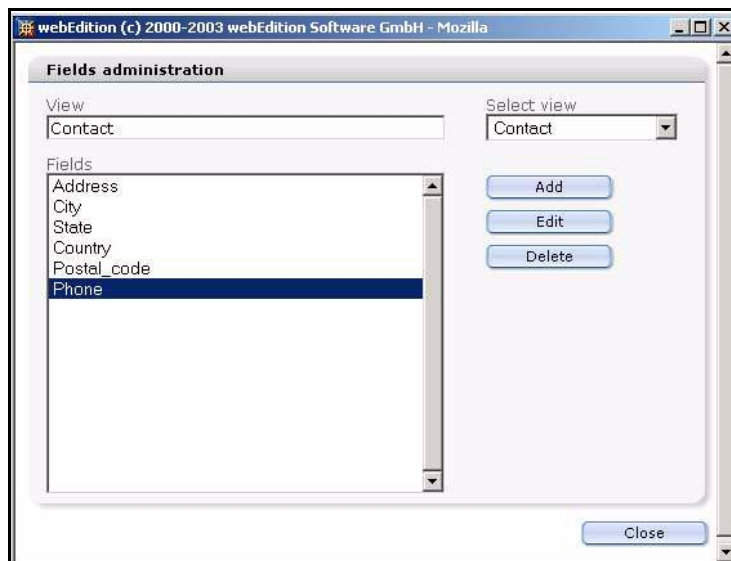
- 2 To create a new view, enter a name for the new view in the *View* field.
- 3 Click the *Add* button adjacent to the *Fields* area.

The Add field dialogue box appears.

- 4 Enter a field name, field type and default value and click *OK*.

Note: You must create at least one field for your view.

A new view has been created. The new view name appears in the View field and also in the Select view select box (see Figure 194).

Figure 194 Creating a new view

- 5 Click on the *Close* button.

A new tab for the view appears on the Customer Management main screen.

Figure 195 New customer tab and view

- 6 You have completed this procedure.

10.4.2 Editing a view

Procedure 24 Editing the name of a view

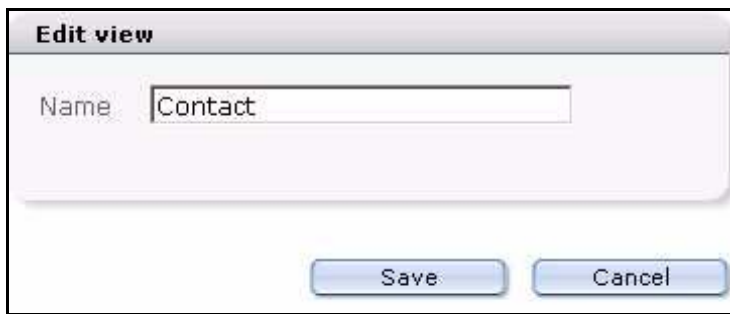
In the Customer Management Module main screen

- 1 Click *Customer > Administration > Fields administration*.

The Fields administration screen opens (see Figure 189, "Fields administration screen" on page 179).

- 2 Click the pencil icon adjacent to the *Select view* select box.

The Edit view dialogue box appears.

Figure 196 *Edit view* dialogue box


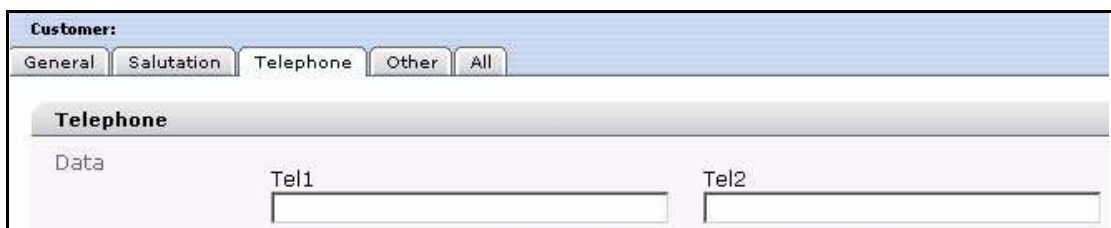
The 'Edit view' dialogue box has a title bar 'Edit view'. Inside, there is a 'Name' label followed by a text input field containing the word 'Contact'. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

- 3 Enter a new name in the *Name* field.
- 4 Click the *Save* button.
A new name for the view appears in the *View* field and in the *Select view* select box.

Figure 197 Edited customer view tab


The 'Fields administration' screen has a title bar 'Fields administration'. It contains two main sections. The first section has a 'View' label and a text input field containing 'Telephone'. The second section has a 'Select view' label and a dropdown menu also containing 'Telephone'. To the right of the dropdown is a small icon of a pencil inside a circle.

- 5 Click on the *Close* button.
The newly-named tab for the view appears on the *Customer Management* main screen.

Figure 198 Renamed customer view tab


The 'Customer Management' main screen has a title bar 'Customer:'. Below the title bar are five tabs: 'General', 'Salutation', 'Telephone', 'Other', and 'All'. The 'Telephone' tab is selected. Below the tabs is a section titled 'Telephone'. Under this section, there is a 'Data' label and two text input fields labeled 'Tel1' and 'Tel2'.

- 6 You have completed this procedure.

10.4.3 Deleting a view

Procedure 25 Deleting a view

In the Customer Management Module main screen

- 1 Click *Customer > Administration > Fields administration*.
The *Fields administration* screen opens (see Figure 189, "Fields administration screen" on page 179).
- 2 Highlight each of the fields in the *Fields* area.
- 3 Click the *Delete* button.
webEdition asks you if you want to delete the chosen field.
- 4 Click the *OK* button to delete the field(s).
The system confirms the action. Click the *OK* button again.
- 5 Click on the *Close* button.

Once you have removed all fields associate with the view, the view and its tab disappear from the Customer Management main screen.

- 6 You have completed this procedure.

11 Designing templates for the Customer Management Modules

In order to make your website accessible to registered users (or customers as we refer to them), you must insert the appropriate we:tags into your templates. This chapter shows you how to use webEdition tags (we:tags) to do the following actions:

- create registration forms so that external users can register as "customers"
- create login areas for your customers on your web site
- make information accessible only to logged-in users or customers.

The we:tags discussed in this chapter pertain to both versions of the Customer Management Module, hence this chapter is intended for users of both the Customer Management and the Customer Management PRO modules.

Those using this chapter are expected to have a knowledge of template development and we:tags. Moreover, webEdition users must have either administrative privileges, or have the permissions to create and deploy templates in order to manage customer access.

11.1 Creating registration forms

You use a registration form to create registered users (or customers) on your web site. By registering visitors to your web site, you can make information available to them that unregistered users cannot see or access.

To create a registration form, you use the `<we:sessionField/>` tag. This we:tag works closely with the Customer Management Module. The `<we:sessionField>` tag draws fields from the Customer Management Module and places them on a Web page.

For example, in your Customer database, if you have the field "Contact_Email", which is designed for the E-mail addresses of your customers, you can display this field value with the `<we:sessionField tag>` by adding the following variables: `<we:sessionField name="Contact_Email" type="textinput"/>`. This tag will produce one input box for the customer E-mail on the page. All field names that are in the Customer Management database can be used as variables with the `<we:sessionField/>` tag. These variables can be initially entered, changed or deleted by using a form containing the `<we:sessionField..../>` tag with the corresponding variable(s).

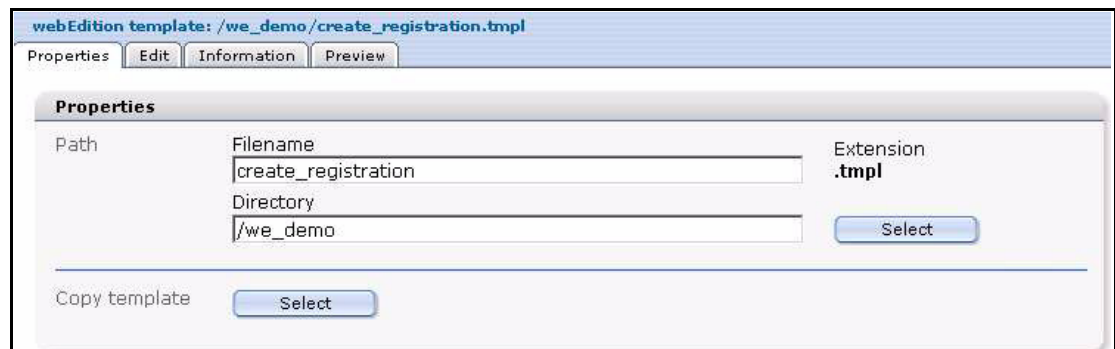
Procedure 26 Creating a registration form

In the Templates view of the webEdition main screen

- 1 If you are not already in the *Templates* view, go there by clicking on the *Templates* tab.

- 2 Open a new template by selecting *File > New > Template*.
- 3 Go to the *Properties* view by clicking on the *Properties* tab (see Figure 199).

Figure 199 The *Properties* view



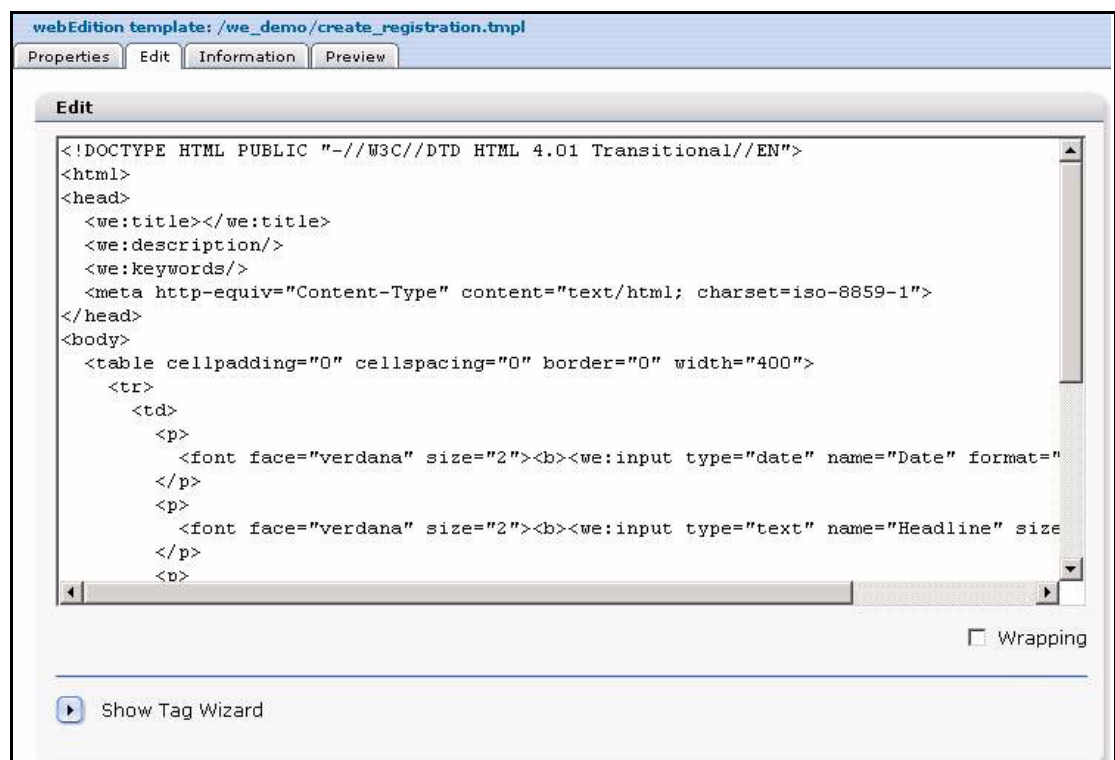
- 4 In the *Path* area, enter a name for the file in the *Filename* field, and select a directory.
- 5 Click *Save*.

Your new template appears in the explorer menu.

Note: *Your template will have a .tmpl file extension.*

- 6 Click the *Edit* tab to open the *Templates Edit* view (see Figure 200).

Figure 200 Template *Edit* view



- 7 Click on the *Show Tag Wizard* arrow. In the *Tag Wizard* area, use the scroll bar to find *sessionField* tag (see Figure 201). Click the *sessionField* tag to highlight it.

Figure 201 we:Tag Wizard: sessionField

- 8 Click the arrow to the right of the select box to open a dialogue box for the `<we:sessionField>` tag.

A "we:sessionField" dialogue box opens (see Figure 202).

Figure 202 we:sessionField dialogue box

- 9 Choose a value from the *name* attribute select box. You will see all the default field names (and any that you have added in the Customer Management Module) that are available for your form (see Figure 203).

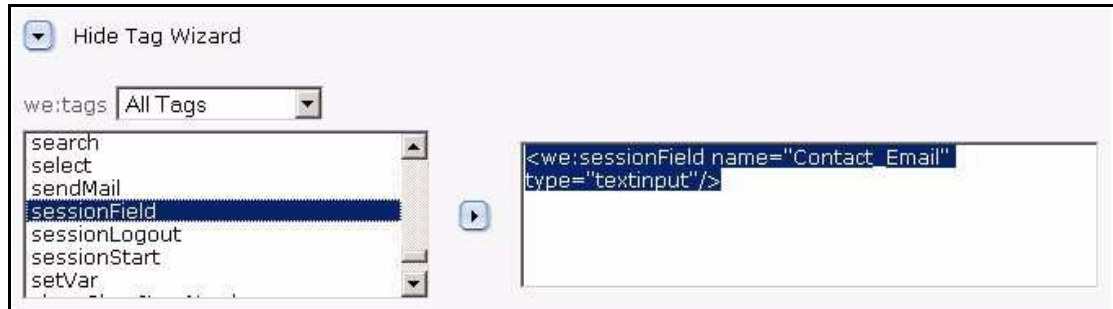
Figure 203 Available field names for your form

10 Choose the type of input field from the *type* select box.

11 Click **Save**.

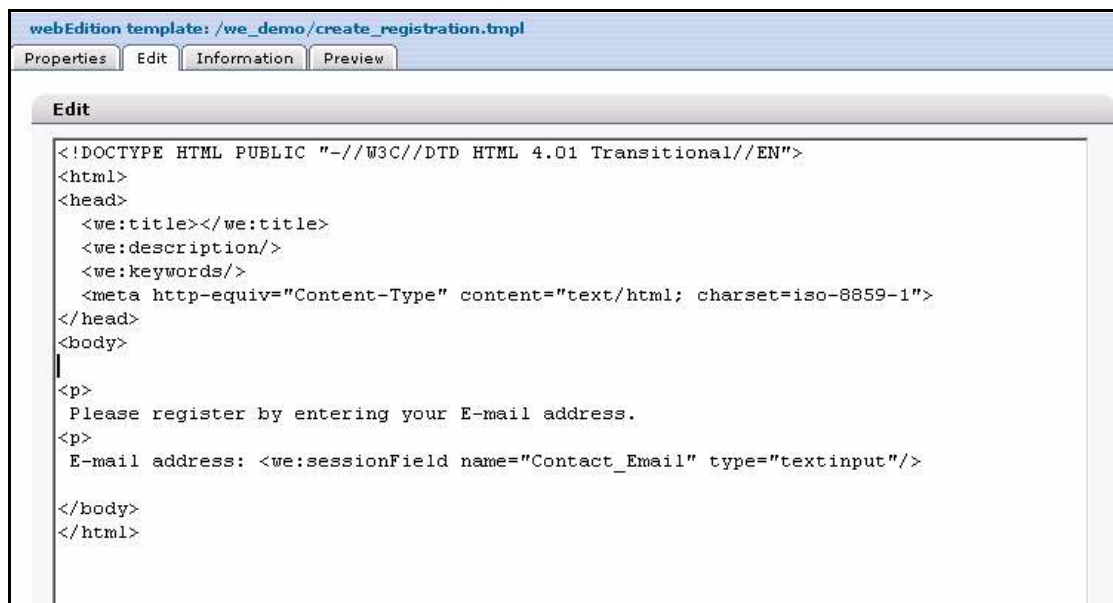
The dialogue box closes and you are returned to the Edit view. The <we:session> tag with your newly defined attribute appears in the right-hand portion of the Tag Wizard (see Figure 204).

Figure 204 The sessionField tag with defined attributes



12 Using your mouse, cut the newly defined tag from the right side of the Tag Wizard and paste it into your template. (You can also edit and add any accompanying text to the template at this time.)

Figure 205 The sessionField tag used in a template



13 Click **Save**.

14 Click on the *Preview* tab to view the changes to your template.

Figure 206 Preview of



15 You have completed this procedure.

11.2 Creating a form to register a new customer

To allow visitors to your site to register as a new customer, you need to create a link on your Web site that points to a form where all required fields (or all fields listed in the customer management database) are called up with the `<we:sessionField/>` tag. Once the visitor has entered all the required information, the form can be saved so that all data will be written to the database. Thereafter the visitor becomes a “customer” and can log in with a user name and password. From this point on, you can view and change the data associated with this customer using the Customer Management Module.

11.2.1 Designing registration forms: code example

You can design registration forms with the following we:tags:

```
<we:sessionStart/>
<we:saveRegisteredUser/>
<html>
<head>
  <we:title>webEdition Default-template</we:title>
  <we:description>Form</we:description>
  <we:keywords>webEdition, cms, </we:keywords>
</head>
<body>
Please enter your personal data:<br>
<we:form id="self">
  Username: <we:sessionField name="Username" type="textinput"/><br>
  Password: <we:sessionField name="Password" type="password"/><br>
  Forename: <we:sessionField name="Forename" type="textinput"/><br>
  Surname: <we:sessionField name="Surname" type="textinput"/><br>
  <we:sessionField name="ID" type="hidden"/>
  <input type="submit" value="go">
</we:form>
</body>
</html>
```

Figure 207 shows the output from the code noted above.

Figure 207 Example of form output

11.2.2 Explanation of code

It is essential that forms in which changes are to be made to the data always contain the following type of hidden field: `<we:sessionField Last name="ID" type="hidden">` This field ensures that the session created by the `<we:sessionStart/>` tag is also transmitted and the customer is uniquely identified. The data cannot be assigned without this session. The following page must begin with:

`<we:sessionStart/><we:saveRegisteredUser/>`. Aside from these tag conventions, you have complete freedom with the layout of your form.

11.3 Creating a login area for your customers

The webEdition Customer Management Module gives you the capability to create a section on your Web site where your customers can log in to your site. By doing so, you can make whole pages or entire sections of your site accessible only to registered users.

The following sub-sections describe how to

- generate a login section where a user can log in
- make information accessible only to logged-in users

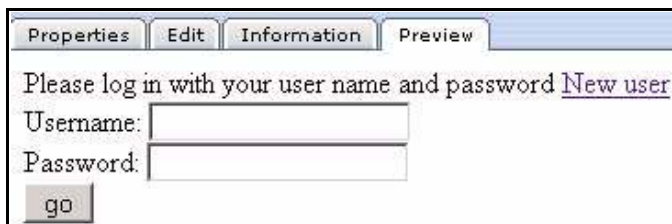
11.3.1 Generating a login section: code example

The following code is an example of how to design a template to allow customers to log in to your Web site:

```
<we:sessionStart/>
Please log in with your user name and password
<we:a id="self">New user</we:a>
<br>
<we:form id="self">
Username: <we:sessionField name="Username" type="textinput" /><br>
Password: <we:sessionField name="Password" type="password" /><br>
<input type="submit" value="go">
</we:form>
```

Figure 208 shows the output from the code noted above.

Figure 208 Example of login form



11.3.2 Making information accessible only to logged-in users: code example

You can make whole pages or entire sections accessible only to registered users. You can implement this function by using the `<we:ifRegisteredUser/>` tag:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print" /><br>
Logged in
</we:ifRegisteredUser>
```

11.3.2.1 Explanation of code

For all functions that you wish to control from the Customer Management Module, you must always include the `<we:sessionStart/>` tag. This tag must appear at the very beginning of every page that has anything to do with the Customer Management Module, before any other (html) tag (e.g. `<html>` or `<body>`).

The code queries whether a user is registered. If so, the user will be greeted with "Hello, user name". User name is a placeholder for the visitor's actual user name as entered in the system.

You can decide what is written between the `<we:ifRegisteredUser>` and `</we:ifRegisteredUser>` tags. It can be individual information, features, links to other pages, navigation or any other functions.

11.4 Creating a form to allow a customer to modify their existing registration data

In order to allow a customer to modify their existing registration data, you need to create a form that is identical to the one described in Section 11.2, "Creating a form to register a new customer" on page 189, but which is located in an area of your site that can only be accessed by registered customers. Because this user is already registered, the registration information will always be called up via the `<we:sessionStart/>` tag. When the customer accesses the form, the existing data in the database will automatically be written to the form fields. Thereafter the customer can modify and save his/her registration information.

12 Database/Object Module: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Database/Object Module. This chapter treats what the module does and how to install it. These topics are treated in the following sections:

- Section 12.1, "What is the webEdition Database/Object Module?" on page 193
- Section 12.2, "Interactions with other webEdition modules" on page 195
- Section 12.3, "Installation" on page 195

You can also find information in this chapter about the basic layout and command features for the Database/Object Module:

- Section 12.4, "General information and navigation" on page 195
- Section 12.5, "Understanding the automatic naming policies" on page 208
- Section 12.6, "Understanding field types" on page 210
- Section 12.7, "Creating/editing vs. displaying objects/classes" on page 216

12.1 What is the webEdition Database/Object Module?

The Database/Object Module allows you to organize your web content using object-oriented programming. This module alleviates the problem of maintaining similar items on multiple pages by simplifying the tasks of selecting, distributing, maintaining, modifying and reusing many different data objects (such as addresses or events) that share a similar data structure.

12.1.1 Intended users

The Database/Object Module is intended for advanced users of webEdition, and those with a knowledge of Web site architecture and design. A working knowledge of the webEdition template development processes, and webEdition tags (we:tags) is required in order to use this module.

12.1.2 What is an object?

An object is any kind of data (such as texts, headings, images, numbers, select field), which can be stored in a structured format, connected relationally with other objects, and selected and displayed in templates and/or documents. Objects have no layout information. An object is a unique instance of a data whose structure is defined according to a "template" provided by its class. Each object has its own values for the variables belonging to its class.

12.1.3 What is an object class?

A class is the structural definition of an object. An object class defines what fields are available for a particular object. A class may also be defined as a set of objects that share a common structure and behavior. For example, a customer security database may have the following classes: last name, first name, address, passport photo etc.

12.1.4 What the Database/Object Module can do

The Database/Object module has many possible uses and applications designed to streamline your web content management and maintenance. Below are just a few of the possible uses. With the Database/Object Module, you can manage

- addresses
- events and addresses
- an image database
- a publications database
- contacts
- news
- a web portal

12.1.4.1 Managing addresses

The management of addresses is a typical application for the Database/Object Module. You can define a class called *Addresses* with all the information you wish to have (street, number, postal code, etc.). The editors can enter all the necessary addresses. You can arrange the addresses in different listviews (by postal code, metadata, last names, etc.). You can define two different templates for different areas (such as Internet and intranet), and display the address in each area using the template allocated to this workspace. All information could be displayed on the intranet, while only part of the information would be visible on the Internet.

12.1.4.2 Managing events and addresses

The connecting of events and addresses is an example of the relational linking of objects. Suppose that you have an editorial staff that publishes new events every day. You have defined a link to the *Addresses* object class in the *Events* object class via the Object field type. The events keep changing but the addresses of the event organizers remain the same. After entering a new event, editors can select an address already available in the Database/Object Module and allocate it to the new event. If the address changes, everything will still remain up-to-date.

12.1.4.3 Image database

A small image database can also be realized using the Database/Object Module. You can create an object class called "images" in which you can define different field types for a thumbnail of the image, the image itself, or a link to the image (if you prefer not to maintain large images in the database), as well as all keywords and the text descriptions. The object listviews allow you to search this small image database, view different descriptions and thumbnails and download the image itself.

12.1.4.4 Publications database

A publication database operates along the same lines as the image database. You can have publications in different formats (*.doc, *.pdf, etc.). You define an object by

defining all descriptions and metadata for these publications and a download link in the class. The object listview can be used to search and download the publications.

12.1.4.5 Managing contacts

See Section 12.1.4.1, "Managing addresses" on page 194, but with modified fields.

12.1.4.6 Managing news

In this application, you not only use the Database/Object Module, but also the Scheduler Module. You can manage all news items as objects so that you can monitor which news items are included on your page, which have not been published yet, which are online, and which are no longer live.

12.1.4.7 Portal manager

If we assume that you have three portals running at one domain, each one of these portals is a defined workspace in webEdition. The editors from the individual workspaces can create news, information and articles as objects for their workspace. If they have objects they would like to make available to the other workspaces, they can select an additional workspace – that was defined with a fixed template in the class definition – that they can use to make this object available to editors in other workspaces. Editors in other workspaces just have to click on the object to be able to use it for their own portals.

12.2 Interactions with other webEdition modules

The Database/Object Module operates and interacts with all of the webEdition modules you have installed. The User Management PRO, Workflow, and Scheduler PRO modules all have advanced features which enhance the use of the Database/Object Module. If you have not installed these modules, you will not be able to see the advanced feature options.

12.3 Installation

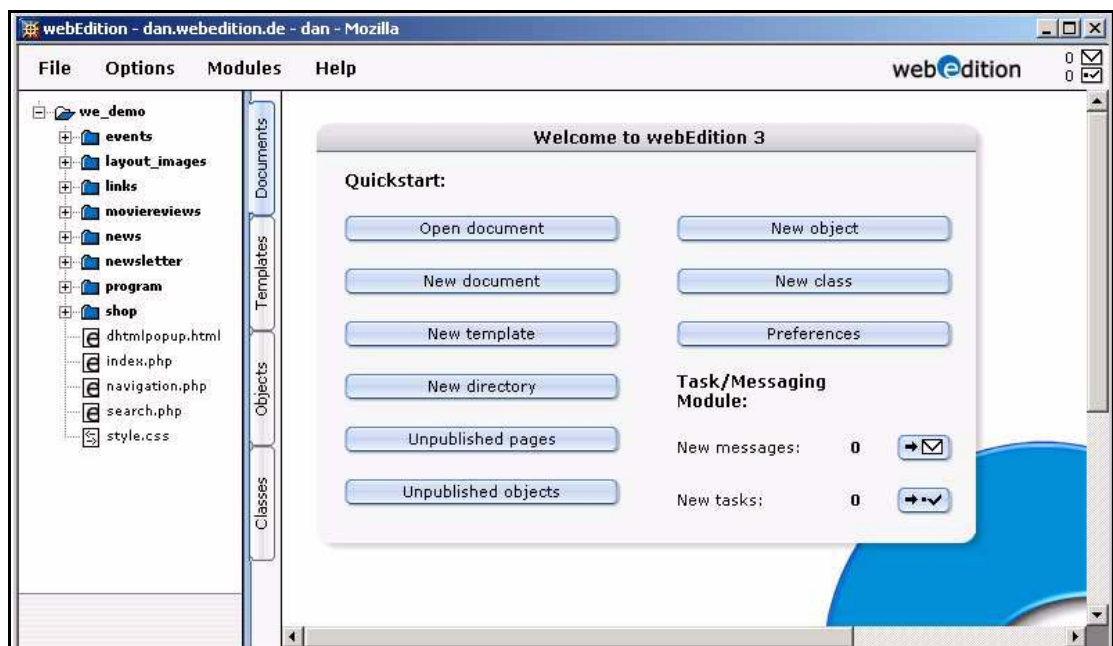
The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

12.4 General information and navigation

When you install the Database/Object Module, its user functions are integrated into the structure and the *File* menu of the webEdition main screen.

Figure 209 webEdition main screen

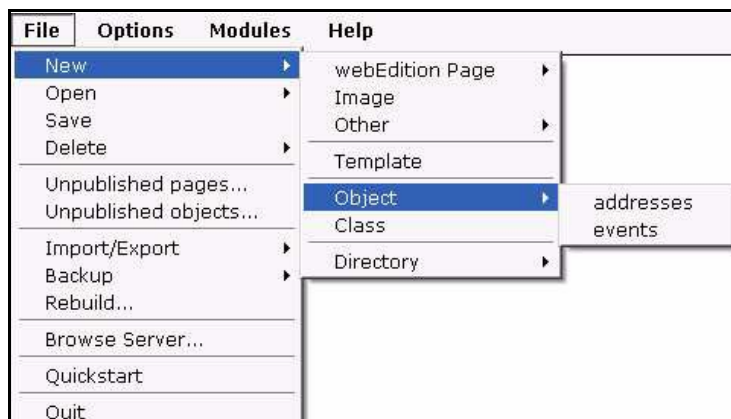


12.4.1 Main menu functions

12.4.1.1 New Object/Class menu

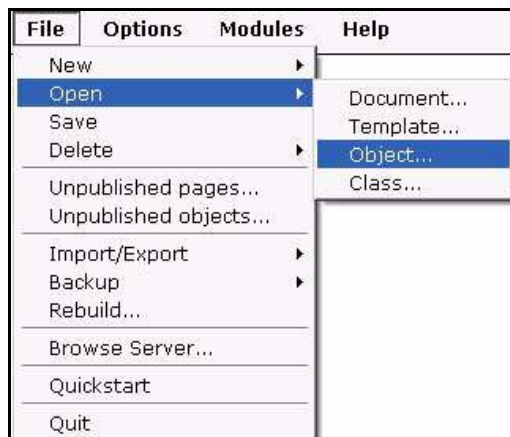
You can create a new object or class of object by selecting the appropriate button from the *Quickstart* screen, or by clicking *File > New > Object* (or *Class*), (see Figure 210).

Figure 210 Create a new object or class



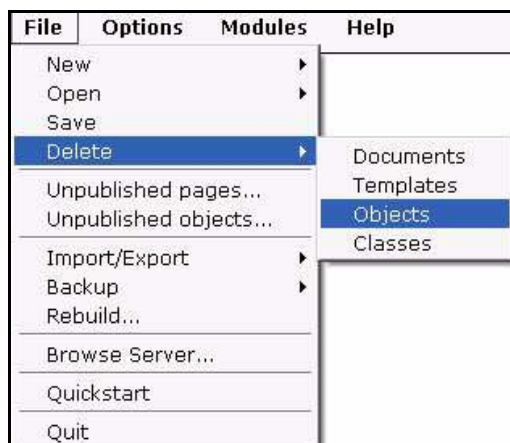
12.4.1.2 Open Object/Class menu

You can open an existing object or class of object by selecting *File > Open > Object* (or *Class*), (see Figure 211).

Figure 211 Open an object or class

12.4.1.3 Delete Object/Class menu

You can delete an existing object or class of object by selecting *File > Delete > Object* (or *Class*), (see Figure 212).

Figure 212 Delete an object or class

12.4.2 Tab functions and the explorer menu

After installing the module, two new tabs, *Objects* and *Classes*, appear along the right-hand side of the explorer menu. The (blue) highlighted tab indicates your present view (see Figure 209, "webEdition main screen" on page 196).

12.4.3 The *Objects* tab

If you click on the *Objects* tab, the tab colour turns to blue, and a list of directories (folders) appears in the objects explorer menu. The "directories" in the objects view represent the object classes. Within each folder are the objects assigned to that object class (see Figure 213).

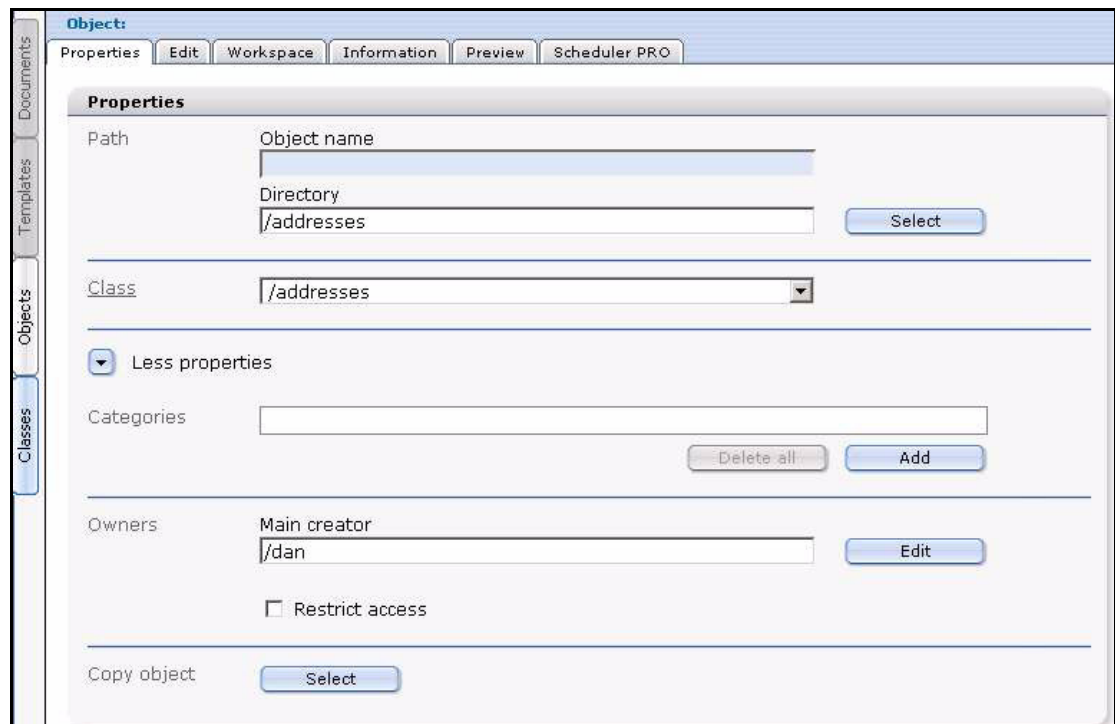
You can open a folder by clicking the plus "+" symbol. The objects appear in the directory. Objects are identified by an icon with the letter "o". If you click on an object itself, webEdition opens an *Edit* screen, which appears in the right part of your screen.

Figure 213 Objects in the explorer menu

12.4.3.1 Views accessible with the *Objects* tab

The *Objects* tab allows you to view and edit all the characteristics of an object. If you click on the (vertical) *Objects* tab, four horizontally-arranged tabs appear. Each tab opens a view.

12.4.3.1.1 *Objects Properties* view The *Properties* view has the following areas:

Figure 214 Objects *Properties* view

- *Path*. This area shows the name of the object and its directory location (or address).
- *Class*. This area identifies the class to which the object belongs.
- *Categories*. The categories area allows you to create sub structures so that you can manage your objects.
- *Owners*. The username of the main owner of the object appears in the *Owners* section. (This area is only available if the User Management or User Management PRO Modules have been installed.) If a new object is created, the current user will be the main owner.

- The *Restrict access* checkbox allows you to limit user access to the object. If you activate this checkbox, a dialogue box opens in which you can add those users who are to be allowed to access the object (see Figure 215).

Figure 215 Restricting user access



- *Copy object*. The *Copy object* function helps you to create new objects in a simple, quick manner. Because objects share characteristics defined by their class, you can copy an existing object using the *Select* button, then modify and save it under a new name.

12.4.3.1.2 The Objects Edit view *Edit*. The *Edit* view is designed to allow a user to enter data in the fields that have been defined by the selected object class (see Figure 216).

Figure 216 The Edit view for objects



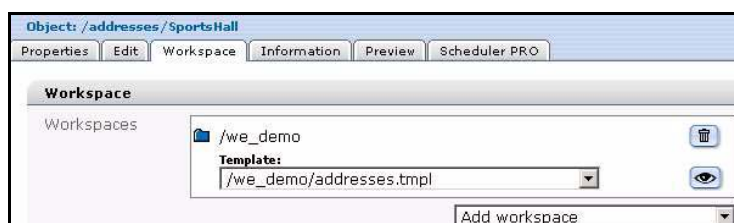
12.4.3.1.3 Objects Workspace view *Workspace*. A workspace is simply a directory to which access rights can be assigned. A workspace contains documents and templates. The term “workspace” has been adopted because it represents the environment in which a user, such as a content editor, performs their editing tasks.

There are two areas to the *Workspace* view:

- *Workspace*, you can see the workspaces specified in the class definition. These are the only areas where the object can be displayed using the corresponding documents.

Only the first workspace defined in the class will be displayed in the *Workspaces* view. You can select any other workspaces defined in the object class in the drop-down menu *Add workspace* (Figure 217).

Figure 217 The Objects Workspace view



- *Extra workspaces*. This area permits you to display an object in an additional workspace.

12.4.3.1.4 Objects Information view *Information*. The *Information* view supplies information about the object identification (ID), file type, the creator, the last change made and the last publication (see Figure 218).

Figure 218 The Objects Information view



12.4.3.1.5 Objects Preview view *Preview*. Use this view to view the appearance of your object (see Figure 219).

Figure 219 The Preview view

12.4.3.1.6 Scheduler PRO view *Scheduler PRO*. This tab is available only if you have installed the Scheduler PRO Module. For details, see the *Scheduler PRO Module User Guide*.

12.4.3.2 Save options

If you wish to save a new or modified object, you have the following options (see Figure 220, "Save options" on page 201):

- *Save*. Select the save button to store an object in the system without publishing it. An object that has been saved but not published appears in red font in the explorer menu.
 - *Publish after saving*. Select this checkbox before saving if you want to save the object in the system and publish it immediately. It will be immediately visible in the corresponding listview.
 - *New object after saving*. Select this checkbox before saving if you want a new, empty object from the same class to appear after the save process is complete. This function facilitates the creation of many objects of the same type.
- *In Workflow*. Select this button to place an object into a workflow.

Note: This option is available only if you have installed the Workflow Module. For further details, see the webEdition documentation page at <http://www.webedition.de/english/downloads/Documentation.html>

- *Unpublish (Park)*. use the *unpublish* function to undo the publication of an object. By doing so you can return an object that has been saved and published to the "saved, but not yet published" status.

Figure 220 Save options

12.4.3.3 Object class summary

If you click on a folder in the explorer menu (while still in the *Objects* view), you can access summary information about the object class. Three tabs appear as shown in Figure 221, "Object workspace view" on page 202:

- Workspace
- Field
- Search

Figure 221 Object workspace view

Directory: /addresses

Workspace Fields Search

Workspace

Directory: / Select

View: 10 ☐ Show visible objects only

Back 1-5 From 5 Next

Show	Object	Workspace	Extra workspaces	Published
<input type="checkbox"/>	SoccerStadium	-	-	2002-10-31 - 13:34
<input type="checkbox"/>	ArenadiMaggio	-	-	2002-10-31 - 13:36
<input type="checkbox"/>	CMS-Hall	-	-	2002-10-29 - 17:56
<input type="checkbox"/>	SportsHall	-	-	2002-10-31 - 13:36
<input type="checkbox"/>	BaseballStadium	/we_demo	-	2004-02-12 - 17:59

Select all

Delete selected objects.

Back 1-5 From 5 Next

12.4.3.3.1 The *Workspace* view The *Workspace* view shows a summary of all objects contained in a class together with all of the assigned workspaces and additional workspaces.

The top portion of the *Workspace* view shows the following items:

- *Directory (field)*. This selector field allows you to select the directory whose workspace you wish to view.
- *View*. This pick list allows you to change the number of objects to display on your screen.
- *Show visible objects only*. Select this checkbox if you wish only to view objects that are visible.

The workspace summary table has the following information and functions:

- *Directory (checkbox)*. The square checkboxes in the first column allow you to select different workspaces. A directory checkbox is used only to determine what objects can be displayed in a given workspace.
- *Show*. The circles in the second column of the table indicate which objects can be displayed in the selected workspace and which cannot.
 - If the circle is gray, the object cannot be displayed.
 - If the circle is blue, the object can be displayed.
- *Object*. This column lists the objects in the selected class. If you click on the word *Object* in the table heading, the list will automatically be sorted alphabetically by object name.
- *Workspace*. This column shows the workspace allocated to an object.
- *Extra workspaces*. This column shows the additional workspaces allocated to an object.
- *Published*. This column identifies the publication status of an object (published, parked or saved) and the date and time of the last operation performed on the object. If you click the word *Published* in the table heading, the list will be sorted by publication date. If an object has not been published or parked, nothing will be entered in the column.

Beneath the table are the following buttons/functions:

- *Select all*. This button allows you to select all directories in the table.
- *Delete selected objects*. The trash can icon allows you to delete the objects you have selected from the table.
- *Search*. You can perform a full-text search by entering a word in the search field. You can also use the adjacent select box to filter your search according to field types.

12.4.3.3.2 The *Fields* view The *Fields* view looks and operates in the same manner as the *Workspace* view, except that it displays all the fields of the object instead of the workspaces (see Figure 222). (Scroll to the right, using the scroll bar at the bottom of the page, in order to see all fields). If you click on the field name in the table heading, the list will be sorted alphabetically according to the entries of that field.

Figure 222 The *Fields* view

Directory: /addresses

Workspace Fields Search

Fields

Directory:

View: ☐ Show visible objects only

1-5 From 5

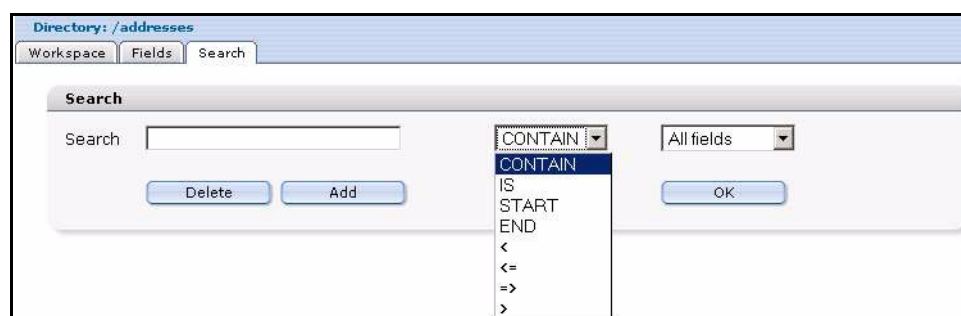
Show	Object	Name1	Name2	Street	ZIP	City	Phone	Email
<input type="checkbox"/>	<input checked="" type="radio"/> SoccerStadium	Soccer Stadium		65 Sportstreet	67868	Sportcity		
<input type="checkbox"/>	<input checked="" type="radio"/> ArenadiMaggio	Arena di Maggio		Via Arena 12	45464	Magicten	009876 / 4389334	info@arenadimaggio.c ...
<input type="checkbox"/>	<input checked="" type="radio"/> CMS-Hall	CMS-Hall		CMS-Street 111	12345	CMS-City	01212 / 38934	cms@cms.cms
<input type="checkbox"/>	<input checked="" type="radio"/> SportsHall	Hall of sports		98 Sportstreet	23412	Sportstown		
<input type="checkbox"/>	<input type="radio"/> BaseballStadium	Baseball Stadium	Balldome	100 Baseball Way	67000	Sportcity	555-5555	baseball@baseballsta ...

1-5 From 5

12.4.3.3.3 The Search view In this view, you can search individual fields using specific criteria (see Figure 223, "The Search view" on page 205).

- *Search.* Enter a keywords into the *Search* field. Next to it is a drop-down menu in which you can select the condition you wish to attach to the keyword.
- Search operator pick list. Use this list to select one of the following search operators:
 - *CONTAIN.* The keyword matches a freely definable combination of characters within the term being searched. Example: "s_t" – returns "news_today" and all other terms that contain this combination of characters.
 - *IS.* 100% match with the keyword, no variation allowed. Example: Keyword: "news_today" – returns: "news_today"
 - *START.* The keyword matches the beginning of the term being searched. Example: Keyword: "news" – returns "news_today" and all other terms that begin with "news".
 - *END.* The keyword matches the end of the term being searched. Example: Keyword: "today" – returns "news_today" and all other terms that end with "today".
 - For numbers:
 - < is less than.
 - > is greater than
 - <= is less than or equal to
 - >= is greater than or equal to
- *Select field.* In the last pick list on the right side, you can select which field should be searched.
- *Delete.* If you want to start a new search, click the *Delete* button to reset the search function.
- *Add.* Click the *add* button if you want to search additional fields simultaneously.

Figure 223 The Search view



12.4.4 The Classes tab

If you click on the *Classes* tab, the tab colour turns to blue, and a list of files appears in the classes explorer menu. The entries in the class view represent the object classes. A class is identified by an icon with the letter "c".

12.4.4.1 Views accessible with the **Classes** tab

You can access the Classes views by clicking on a class icon in the explorer menu. The edit mode has four views:

12.4.4.1.1 Classes Properties view *Properties*. This view has two areas, *Path* and *Default* (see Figure 223).

- *Path*. This area shows the name of the class.
- *Default*. This area has the following fields:
 - *Automatic name*. If you wish to use the automatic naming feature, select an item from the *Automatic name* drop-down menu. Each type is described in detail in Section 12.5, "Understanding the automatic naming policies" on page 208.
 - *Categories*. See page 198
 - *Restrict access*. See page 199

Figure 224 The class **Properties** view

12.4.4.1.2 Classes Edit view *Edit*. The actual structure of the object class is created in the *Edit* view (see Figure 225). The structure of an object class consists of different types of data fields. These fields do not contain any layout information.

Figure 225 The class *Edit* view

The screenshot shows the 'Edit' view for a class. On the left is a sidebar with 'Documents', 'Templates', 'Objects', and 'Classes' (highlighted). The main window has tabs for 'Properties', 'Edit', 'Workspace', and 'Information'. The 'Edit' tab is selected, displaying a form with the following fields and controls:

- Name:** A text box containing 'NewField' with a plus icon and a trash icon to its right.
- Type:** A drop-down menu showing 'Text input'.
- Length:** A text box containing '255'.
- Default:** An empty text box.
- Options:** Three radio buttons labeled 'Title', 'Description', and 'Required field' (which is checked).
- Users:** A text box containing 'Everybody' with a user icon to its left.
- Buttons:** 'Delete all' and 'Add' buttons at the bottom right.
- Footer:** A plus icon in a box at the bottom left.

Click the plus button to create the first field of the new object class.

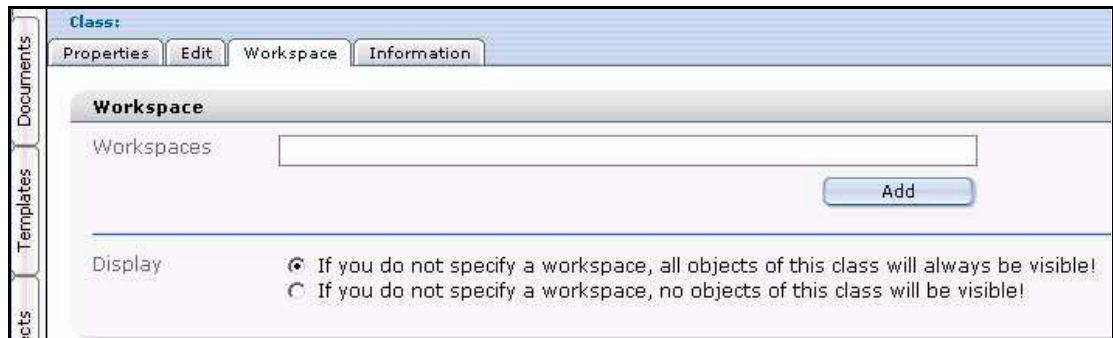
- *Name.* Use this area to specify the name of the field. The following characters are permitted: all letters from a to z and A to Z, numbers, underscore (_), minus (-) and dot (.). No other characters are allowed. Do not use accented letters. You will always be given a default name (input0).
- *Type.* Use this area to specify the field type using this drop-down menu. The available field types are described in Section 12.6, "Understanding field types" on page 210.
- *Length.* Enter a value in this text box that represents the length of the field in the database. For example, if you set the value to 20 for a text input field type, the content can only have 20 characters. It is useful for saving memory.
- *Default.* Enter the default value for the corresponding field. When creating a new object, the value that you enter will be filled automatically in the object field.
- *Title.*
- *Description.*
- *Required field.*
- *Users.* Select which users are allowed to access the object by clicking the *Add* button.

12.4.4.1.3 Classes *Workspace* view *Workspace.* In the *Workspace* view, you can pre-set the environment(s) in which the objects based on this object class are visible (see Figure 226, "The *Workspace* view" on page 208). Because the object is stored without any layout information, you must also allocate a template with which to view of the object.

You can also use the radio buttons in the *Display* area to determine whether or not you want to display the object class in the selected workspace.

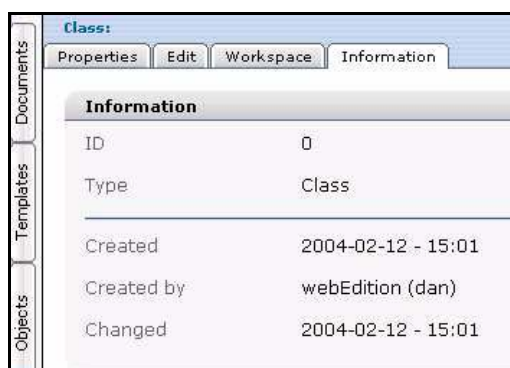
By clicking the add button, you will open the file manager in which you can select a directory (workspace). If you do not define a workspace, the object can be displayed anywhere. The object will always be displayed using a document (listview, detailed view).

Figure 226 The *Workspace* view



12.4.4.1.4 Classes *Information* view *Information.* The Classes *Information* view supplies read-only information about the file ID and type, the creation date, creator, and the last changes made to the class (see Figure 227).

Figure 227 Class *Information* view



12.5 Understanding the automatic naming policies

The following subsections describe in detail the automatic naming policies. The *Automatic name* options pertain to object classes. The controls are found in the *Default* area of the *Properties* view.

Figure 228 Automatic naming select box



If you fill in the *Automatic name* field, all objects created later with this class will be named uniformly and in order without requiring you to enter a new name each time.

12.5.1 *Unique*

The *unique* option allows you to instruct webEdition to identify an object with a randomly selected and unique alpha-numeric name.

After clicking *unique*, a number field appears beside the *Automatic name* drop-down menu (see Figure 229, "Automatic naming policy: unique" on page 209). This number indicates the number of characters the unique identifier will have. The default value is 16 characters.

Figure 229 Automatic naming policy: unique



The image shows a web form titled "Automatic name". It contains a dropdown menu with "Unique" selected, a text input field containing the number "16", and another dropdown menu below it showing "----".

12.5.2 *Day*

The *Day* option allows you to specify the portion of the name that will have the current date as its identification. "01" will be displayed if the current date is 09/01/2003.

12.5.3 *Month (01-12)*

The *Month (01-12)* option allows you to specify the portion of the name that will have the date of the current month as its identification. "09" will be displayed if the current date is 09/01/2002.

12.5.4 *Month (1-12)*

As above in *Month (01-12)*, except without the "0" for the months from January ("1" instead of "01") to September ("9" instead of "09"). "9" will be displayed if the current date is 09/01/2003.

12.5.5 *Year (02)*

Clicking this option allows you to specify the portion of the name that will have the date of the current year as its identification. "02" will be displayed if the current date is 09/01/2002.

12.5.6 *Year (2002)*

As above in *Year (02)*, except the full year will be displayed (2002). "2002" will be displayed if the current date is 09/01/2002.

12.5.7 *Hours*

The *Hours* option allows you to specify the portion of the name that will have the current hour as its identification. If, for example, the system clock is currently 11:23, "11" will be displayed. If you set the North American time format (am/pm), this option will still display the hours 0-23.

12.5.8 *ID*

Click the *ID* option and you can specify the portion of the name that will have the ID of the corresponding object as its identification. Like all documents, all objects have a

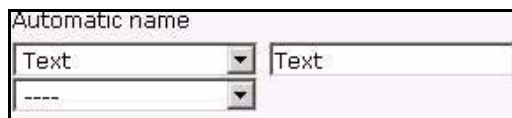
unique ID. This is also a unique identifier. If the ID of the newly created object is "566", "566" will be displayed.

12.5.9 Text

The *Text* option allows you to specify the portion of the name that will have a text of your choice as its identification (see Figure 230).

This identifying text can contain upper and lower-case letters and numbers. The following characters are permitted: all letters from a to z and A to Z, numbers, underscore (_), minus (-) and dot (.). No other characters are allowed. Do not use accented letters such as ä or ö.

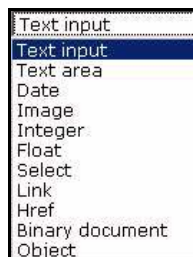
Figure 230 Automatic naming policy: Text



12.6 Understanding field types

The following subsections describe in detail the field types that are available from the *Classes > Edit* view.

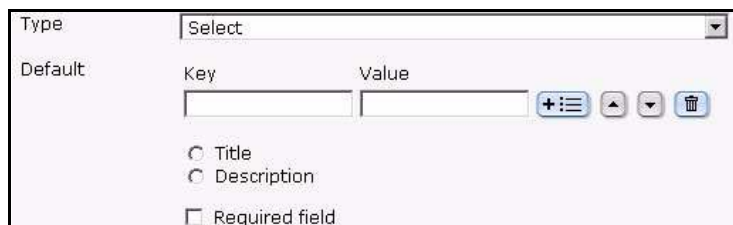
Figure 231 Field Types



12.6.1 Select

The *Select* field type allows you to create a select box or pick-list. Editors can choose an entry from the select field when creating a new object (see Figure 232).

Figure 232 Select field type



The *Default* settings are as follows:

- *Key*. Should begin with 0. Permits future changes to the individual select items under *Value*.
- *Value*. Name of the select item
- *Title*. Fetches the title for search function

- *Description*. Fetches the description for search function
- *Required field*. This field must be filled in; if it is not filled in you will not be able to save the object.

To define a new entry in the select field, click the plus “+” icon next to the *Value* field. To delete an existing entry, click the trash can icon.

The *add* button underneath the *user* field allows you to set the permissions for individual users and/or groups to edit this field.

The two option buttons *Title* and *Description* can only be clicked once per object class. They allow you to define the title and description displayed in a listview (title and description) for each object class. These fields will then be the only ones displayed in the listview.

12.6.2 Date

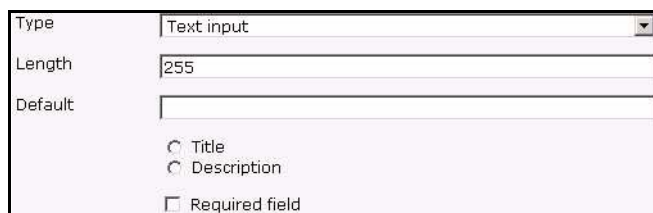
The *Date* field type allows you to generate a date field. The default setting is always the current date and time. The editor can change this field.

All other aspects are like *Select*.

12.6.3 Textinput

The *Textinput* type permits you to define one-line text entry fields (see Figure 233).

Figure 233 *Textinput* field type



Type	Text input
Length	255
Default	
<input type="radio"/> Title <input type="radio"/> Description <input type="checkbox"/> Required field	

- *Length*. The maximum number of characters that can be entered.
- *Default*. Entry of a default text.

All other aspects are like *Select*.

12.6.4 Textarea

The *Textarea* field type allows you to generate a textarea (that is a textbox with several rows).

Figure 234 Textarea field type

- *Name*: Give the settings a name.
- *Type*: Select *Textarea*.
- *Default setting- Attributes...* When you click on the button *Attribute...*, a new dialogue window for the attribute settings opens (see Figure 235).

Figure 235 Textarea Attribute

- *wysiwyg*: on/off (de)activates the WYSIWYG mode.
- *forbidhtml*: on/off allows or permits to code HTML in the textarea.
- *forbidphp*: on/off allows or permits to code PHP in the textarea..
- *xml*: If xml is true, XML conform source code is generated.
- *removefirstparagraph*: If removefirstparagraph is true, the first paragraph is removed.
- *inlineedit*: If inlineedit is true, the WYSIWYG Editor is deactivated in the normal edit mode. Instead of the WYSIWYG editor, the text is displayed with a Edit button. If you click on that, the WYSIWYG editor appears in a separate

window. Loading a page with a lot of WYSIWYG textareas is much faster this way.

- *showmenus*: on/off (de)activates the drop-down menus (dhtmledit has to be “on” for that function).
- *classes*: Enter the classes, for which the settings apply.
- *commands*: Choose the commands in the select box, for which the settings apply. Than the selected commands are displayed automatically in the textbox underneath. You can also write the commands directly in the textbox.
- *Default setting- Title/Description*: Here you can input a title or a description of a textarea.
- *Default setting- Obligational field*: Choose if text has to be input in the textarea (*Obligational field* activated) or not (*Obligational field* not activated).
- *User*: Define with the button *Add*, which users may input or edit text in the textarea.

12.6.5 Image

This field type permits you to define image fields (see Figure 236).

Figure 236 Image field type



Default setting: If you wish, you can define a default image.

All other aspects are like *Select*.

12.6.6 Integer

This field type allows you to define a number field for integer values (whole numbers) as seen in Figure 237.

Figure 237 Integer field type



- *Length*. The maximum length of number
- *Default* setting. If you wish, you can define a default value.

All other aspects are like *Select*.

12.6.7 *Float*

This field type allows you to define a number field for float values (decimal numbers) as seen in Figure 238.

Figure 238 *Float* field type



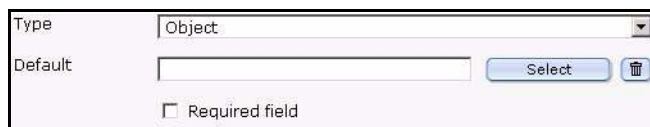
Type	Float
Default	
<input type="checkbox"/> Required field	

- *Default* setting. If you wish, you can define a default value.

12.6.8 *Object*

This field type allows you to link another object to the newly created relational one. The editors will then be able to select objects from an object class whenever they create new objects. For example, if you create objects of the "Contact person" class, you can connect these objects with objects of the "Addresses" class so that contact people are always displayed alongside their addresses (see Figure 239).

Figure 239 *Object* field type



Type	Object
Default	<input type="text"/> Select 🗑️
<input type="checkbox"/> Required field	

- *Default* setting. Select the desired class.

All other aspects are like *Select*.

12.6.9 *Link*

The *Link* field type permits you to define an external link (URL) on another Web page, an internal link or a document to be downloaded (see Figure 240). This field has the same functionality as the `<we:link>` tag. The output is a link.

Note: External links have to be entered with "http://...".

Figure 240 *Link* field type



Type	Link
Default	New Link Edit 🗑️
<input type="radio"/> Title <input type="radio"/> Description	
<input type="checkbox"/> Required field	

All other aspects are like *Select*.

12.6.10 *Href*

This field type permits you to define an external link (URL) on another web page, an internal link or a document to be downloaded (see Figure 241, "Href field type" on page 215). This field has the same functionality as the `<we:href>` tag. The *Select* button for

ext.href launches the "Browse server" function so that you can easily link files that are stored outside of the webEdition database on the server. The output is a link.

Note: External links have to be entered with "http://...".

Figure 241 Href field type

Default: Desired internal or external URL

All other aspects are like *Select*.

12.6.11 Binary

The *Binary* field type allows you to insert a binary file to be downloaded (see Figure 242). This file first has to be imported using *File > New > Others > Other files* in webEdition. The output is a link.

Figure 242 Binary field type

Default: Desired file.

All other aspects are like *Select*.

12.6.12 Combining fields, sorting and deleting fields

You can combine, sort, or delete fields using the add button (plus icon), as seen in Figure 243.

Figure 243 Combining fields

The screenshot shows a dialog box titled 'Combining fields'. It has several input fields: 'Name' with the value 'NewField', 'Type' with a dropdown menu showing 'Text input', 'Length' with the value '255', and 'Default' which is empty. Below these are two radio buttons, 'Title' and 'Description', both of which are unselected. There is a checkbox labeled 'Required field' which is also unchecked. A 'Users' field contains a user icon and the text 'Everybody'. At the bottom of the dialog are two buttons: 'Delete all' and 'Add'. A small plus button is located in the bottom left corner of the dialog box.

Click the plus button to insert an additional field in front of a field. Click the trash can icon to delete the field.

Click the plus button on the bottom left of the page to add a field.

12.7 Creating/editing vs. displaying objects/classes

In the chapters that follow we shall differentiate between creating and editing objects/classes (see Chapter 13) and displaying them in the front end system (see Chapter 14).

12.7.1 Creating/editing objects/classes: permissions

In general, creating new classes or objects is a privilege that depends on the permissions granted to each webEdition user by the administrator. As such, it can be assigned and withdrawn. You can define in User Management PRO whether someone can create a new class or a new object based on an existing class.

When creating a new class, the administrator can define who can create objects within this new class in the *Properties* view of the object classes. If the administrator does not restrict access, everyone who principally has this privilege will be able to create new objects based on this class. However, an administrator can also restrict access so that only a selection of users will be entitled to create new objects based on this class.

ATTENTION

The permissions assignment function in the User Management PRO Module is the only way to manage the privilege to create object classes. If you have not installed this module, all users will be able to create classes and objects.

12.7.2 Displaying objects in the front end

The display of objects in the front end as a list or in the detailed display, is always done by means of templates and documents. If you want to display stored objects, you must create a document based on a template that contains the corresponding listview or fields for a detailed display.

Unlike creating or changing objects, displaying the objects in the front end system (via listview or the detailed display) is not organized by users, but by workspaces. A workspace is a directory to which access rights can be assigned when you set up your object classes.

For example, if you have a workspace called "PR" and have allocated the "Press releases" object class exclusively to this workspace, objects of the "Press releases" class can only be displayed by a document stored in this area with the corresponding listview. If the same document with the same listview is stored in another directory (workspace), the listview will not display any objects.

13 Creating classes and objects

The following procedures will guide you through the process of creating an object class, and an object. In addition, at the end of the chapter you will find exercises to help you use workspaces.

13.1 Creating an object class

Before you can create any objects, you must create an object class. A class is the structural definition of an object. An object class defines what fields are available for a particular object.

Procedure 27 Creating a new object class

In the webEdition main menu

- 1 In the main menu, click *File > New > Class*.
The Classes Properties view opens (see Figure 244).

Figure 244 Creating object classes

- 2 In the *Path* area, enter the name that you wish to give to the new object class in the *Class name* field.
- 3 If you wish to use the automatic naming feature, select an item from the *Automatic name* drop-down menu. Each type is described in Section 12.4.4, "The Classes tab" on page 205.
If you fill in this field, all objects created later with this class will be named uniformly and in order without requiring you to enter a new name each time.
- 4 If you wish to assign a category to your object class, click the *Add* button.
A dialog box opens in which you can choose a category for the object class.

- 5 If you wish to limit user access to the object class, activate the *Restrict access* checkbox.

Note: The *Restrict access* feature is only available if the User Management or User Management PRO Modules has been installed.

Figure 245 Restrict access: user name pick list



- a Select which users are allowed to access the object by clicking the *Add* button.
A dialog box opens in which you can choose the users who will have access rights to the object class.
- b Select the users that are to have access and click on the *OK* button.
- c If you wish to allow read-only access to the selected users, activate the *Read only* checkbox adjacent to the user name (see Figure 246).

Figure 246 Restricting users to *Read only* access



- d Save the user setting by selecting the *Save* button at the bottom of the page.
An information box opens and webEdition informs you that your changes have been saved.
- e Select the *OK* button on the information box to continue.
- 6 Click on the *Edit* tab.
The Edit view opens. The first time you create an object class, webEdition displays an empty data field icon.
- 7 Click on the plus "+" icon to open the *Edit* view for the first field of the object class.
webEdition opens the Edit view (see Figure 247).

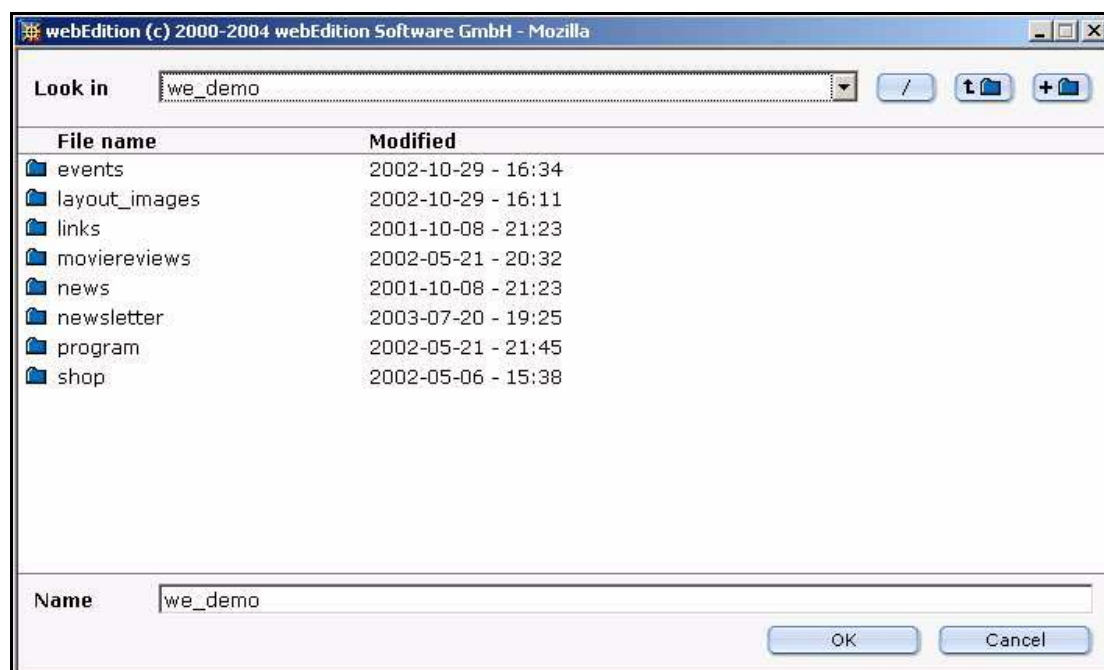
Figure 247 Object Classes *Edit* view

- 8 Specify the name of the field in the *Name* text box.

Note: The following characters are permitted: All letters from a to z and A to Z, numbers, underscore (_), minus (-) and period (.). Do not use accented letters.

- 9 Choose the field type using the *Type* drop-down menu. Each field type has different default settings that you must define. For details about each field, see Section 12.6, "Understanding field types" on page 210.
- 10 You can add, sort or delete fields by doing the following sub-steps:
 - a To add a new field in front of your current field, click the plus button.
 - b To add a second field after your current field, click the plus button on the bottom left of the page.
 - c To move a field within the field list, click the up or down arrow.
 - d To delete a field, click the trash can symbol to delete this field.
- 11 Click the *Workspace* tab to open the *Workspace* view.
- 12 Assign the workspace(s) for which the objects in this object class are to be visible by clicking the *Add* button.

The file manager opens in which you can select a directory (workspace), as seen in Figure 248.

Figure 248 Assigning a workspace for an object class

Note: If you do not specify a workspace, you can choose from the buttons in the *Display* area whether or not to display an object. The object will always be displayed using a document (listview, detailed view).

- 13 After choosing a directory, you must also allocate a template with which the object (which is stored without any layout information) can be displayed. Select a template from the *Template: pick list* that appears under the directory name.
- 14 Click the *Save* button.
- 15 You have completed this procedure.

13.2 Creating an object

After creating an object class, you can create an object. An object is a unique instance of a data whose structure is defined according to its class. Each object has its own values for the variables belonging to its class.

Procedure 28 Creating a new object

In the webEdition main menu

- 1 In the main menu, click in the menu *File > New > Object > "name of a selected object class"*.

Note: You cannot create an object without first defining an object class. If you have not defined any classes, you will not see any object classes listed in the menu after *Object*. In this case you must return to Procedure 27, "Creating a new object class" on page 219.

The Properties view opens.

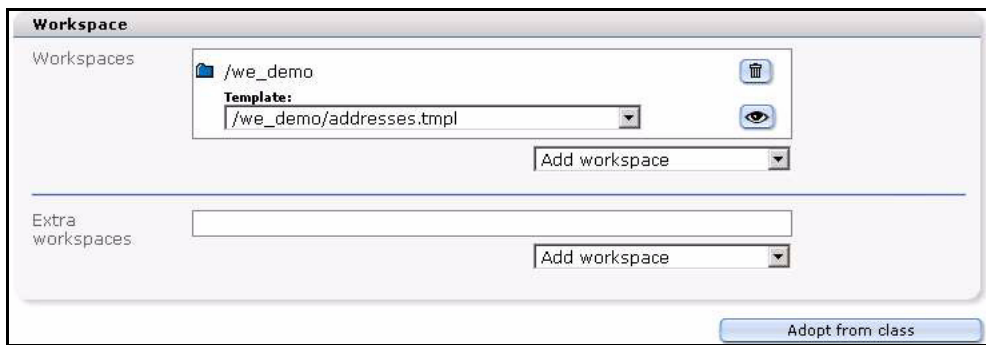
- 2 In the *Properties* view, enter a name for the object in the *Object name* field (see Figure 249).

Figure 249 Creating a new object

The screenshot shows a software window titled 'Object:'. It has several tabs: 'Properties', 'Edit', 'Workspace', 'Information', 'Preview', and 'Scheduler PRO'. The 'Properties' tab is active. Inside this tab, there are three main input areas: 'Object name' with the text 'Baseball_field', 'Directory' with the text '/addresses' and a 'Select' button, and a 'Class' dropdown menu currently showing '/addresses'.

Note: If you selected the automatic naming feature when defining the object class, you do not have to enter a new name. The automatic naming feature automatically creates a name for your new object, ensuring that all objects within this class are named uniformly and in order. For details on the automatic naming feature, see Procedure 27, "Creating a new object class," Step 3 on page 219.

- 3 Click on the *More properties* icon.
 - a If you wish to associate the object class with an existing *Category*, select the *Add* button under the categories field.
A list of available categories appears in a dialog box from which you can choose a category.
 - b If you wish to define an owner, enter the name in the *Owners* area
The user name of the owner of the object appears in the Owners area. (This area is only available if the User Management or User Management PRO modules have been installed.) If a new object is created, the current user is the main owner.
 - c For users of the User Management and User Management PRO modules:
 - i If you wish to limit access to the object, you can activate the *Restrict access* function. There, you can select which users are allowed to access the object.
 - ii You can also activate the *Read only* checkbox that appears to the right of the user name option so that they can read the object but not change it.
 - d If you wish to create a long series of objects that are only slightly different from one another, use the *Copy object* function. The *Copy object* function allows you to import an existing object with all its settings. Thereafter you can make the necessary minor changes in the *Edit* view (see the following step) and then save the new object.
- 4 Save your entries by clicking the *Save* button.
- 5 Click on the *Edit* tab.
The Edit view opens.
- 6 Fill in the individual fields that appear in the *Edit* view for the object and save the new object.
Depending on the method used to save it, the object will then be displayed either in all the corresponding summaries (listviews) or in the detailed view.
- 7 Assign the workspace(s) for which the objects in this object class are to be visible.
The file manager opens in which you can select a directory (workspace), as seen in Figure 250.

Figure 250 Assigning a workspace to an object

Note: If you do not specify a workspace, you can choose from the buttons in the Display area whether or not to display an object. The object will always be displayed using a document (listview, detailed view).

8 Verify the details about your object by clicking on the *Information* tab.

9 Click on the *Save* button.

Your new object will appear in the explorer menu under its object class.

10 You have completed this procedure.

13.3 Using workspaces

The following examples show how you can assign different workspaces to selected objects.

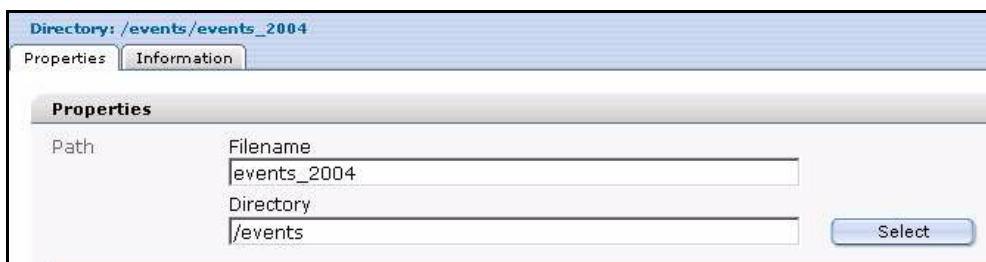
13.3.1 Assigning a new workspace

The purpose of this exercise is to show you how to create an object directory and an object, and to assign a new workspace to it.

Procedure 29 Assigning a new workspace, and deleting an old one

In the Objects view

1 Create a subdirectory with the name *events_2004* under the *events* class on the webEdition demo page by selecting *File > New > Directory > Object directory* (see Figure 251).

Figure 251 Creating a subclass

2 In the *Path* area, enter the name *events_2004* in the *Filename* field.

3 Click on the *Select* button adjacent to the *Directory* field.

The file manager opens, from which you can choose a directory.

4 Select the *events* directory and click the *OK* button.

5 Click the *Save* button at the bottom of the *Properties* view.

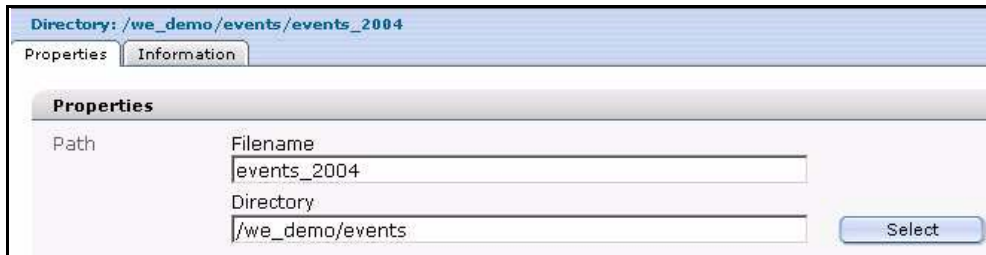
The system confirms that the new directory has been saved. After you close this dialog box, your new directory appears in the explorer menu as a subfolder under the events folder.

- 6 Create a subdirectory called `events_2004` under the *Documents* view by selecting *File > New > Directory > Documents directory*.

The system opens the Documents Properties view (see Figure 252).

- 7 Repeat Step 2 through Step 5.

Figure 252 New documents subdirectory



- 8 Create a new object called `2004_01_01_01` in the newly created subclass object folder `events_2004`. To do so, click *File > New > Object > events*, type `2004_01_01_01` in the *Object name* field, and choose the `events_2004` directory using the *Select* button adjacent to the *Directory* field.
- 9 While still in the *Objects* view, click the *Edit* tab, and enter values into the required fields.

Note: The required fields are noted with an asterisk (*).

- 10 Save and publish the new object in the subclass object folder `events_2004`.

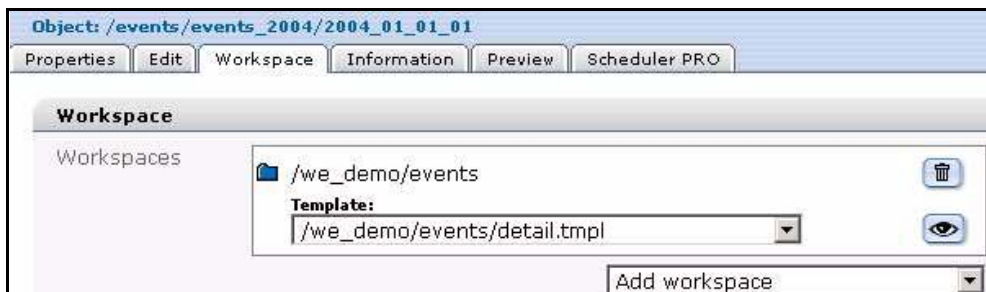
You will see the following display in the explorer menu:

Figure 253 New object

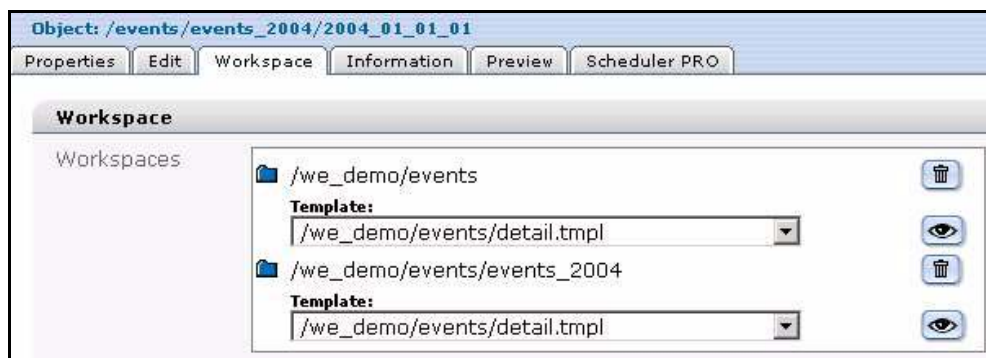


- 11 Click on the new object `2004_01_01_01` and select the *Workspace* view (see Figure 254).

Figure 254 Workspace for the new object



- 12 Add a new workspace `/we_demo/events/events_2004` from the *Add workspace* drop-down menu (see Figure 255). (This workspace is actually the new subdirectory that you created in the document view in Step 6 and Step 7 of this procedure).

Figure 255 Add a new workspace

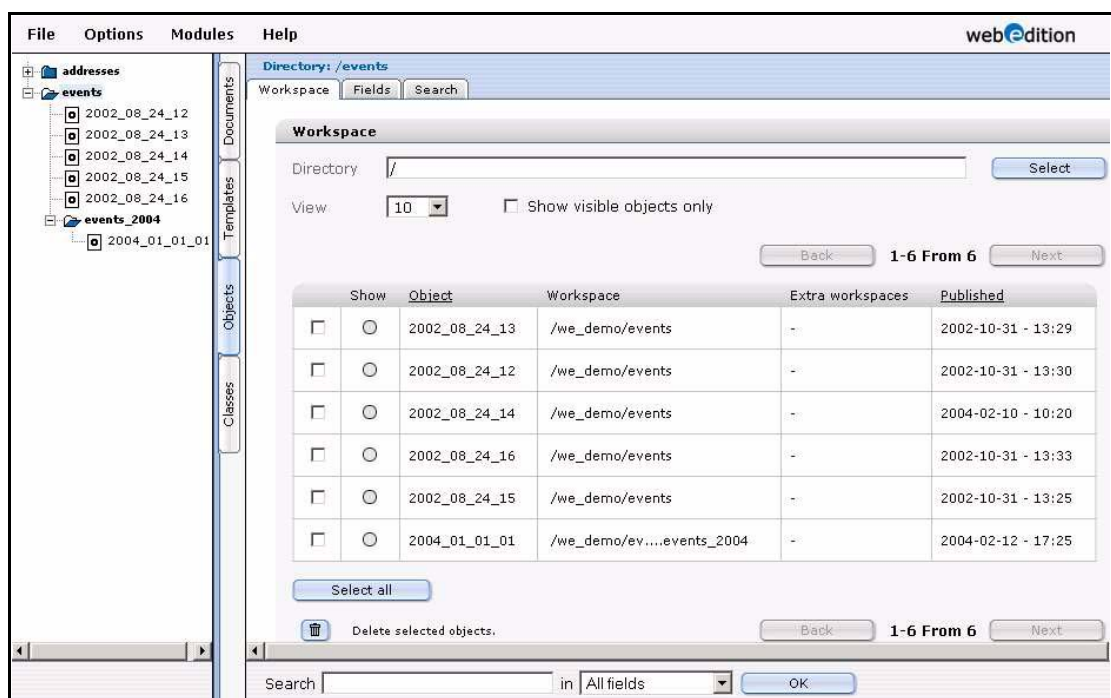
- 13 Delete the old workspace `/we_demo_events` by clicking the trash can icon adjacent to the field, and click the Save button.

You are be left with the new workspace `/we_demo/events/events_2004`.

- 14 In the *Objects* view, click on the *events* class folder in the explorer menu to view an overall summary of all objects contained in the *events* class.

The Workspace view appears as seen in Figure 256, "Summary of all objects in the events class" on page 226.

Note: *If you have not selected a directory and are still in the root directory, all the circles in the Show column will be gray because none of the objects can be displayed in the root directory.*

Figure 256 Summary of all objects in the events class

- 15 In the *Workspace* view, choose the `/we_demo/events` directory by clicking the *Select* button adjacent to the *Directory* field.

The circles next to the object (except for the new one) in the Show column turn blue, indicating that the object can be displayed in the assigned workspace (see Figure 257). If you select the `/we_demo/events/events_2004` directory, the circle next to the new object will also become blue, indicating that it can be displayed in this workspace.

Figure 257 Display properties for objects in a workspace

Show	Object	Workspace
<input checked="" type="radio"/>	2002_08_24_13	/we_demo/events
<input checked="" type="radio"/>	2002_08_24_12	/we_demo/events
<input checked="" type="radio"/>	2002_08_24_14	/we_demo/events
<input checked="" type="radio"/>	2002_08_24_16	/we_demo/events
<input checked="" type="radio"/>	2002_08_24_15	/we_demo/events
<input checked="" type="radio"/>	2004_01_01_01	/we_demo/ev....events_2004

- 16 You can now view the object by clicking on it in the explorer menu, then clicking the *Preview* view.

Figure 258 Viewing an object with the *Preview* view

Object: /events/events_2004/2004_01_01_01

Properties Edit Workspace Information Preview Scheduler PRO

Preview

EventName
Launch of WebEdition 3

EventDescription
Partner's Day celebrating the launch of webEdition 3.

EventDetail
webEdition3 will be launched in February 2004. To celebrate this launch, we are holding a Partner Appreciation day. A sneak preview of the product will be offered to our invitees.

EventDate
2004-02-06 - 09:00

- 17 You have completed this procedure.

13.3.1.1 Assigning an extra workspace

The following procedure builds upon what was discussed in Section 13.3.1, "Assigning a new workspace" on page 224. In this procedure you will learn how to create extra workspaces for your objects.

Procedure 30 Assigning an extra workspace

In the Objects view

- 1 Click the new object 2004_01_01_01 in the *Object* view, that you created in Procedure 29, "Assigning a new workspace, and deleting an old one" on page 224.
- 2 Select the *Workspace* view.
- 3 In the *Extra workspaces* area, select the /we_demo/events from the *Add workspace* drop-down menu.
- 4 Activate the *Publish after saving* check box, and click the *Save* button.
- 5 In the *Objects* view, click on the events class directory.

A summary of all objects in the events class appears in which you see an entry in the Extra workspaces column in the row assigned to the object 2004_01_01_01 (see Figure 259):

Figure 259 Summary of objects

<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	2004_01_01_01	/we_demo/ev....events_2004	<input checked="" type="checkbox"/>	/we_demo/events	2004-02-12 - 17:47
-------------------------------------	----------------------------------	---------------	----------------------------	-------------------------------------	-----------------	--------------------

- 6 You can share the object for this workspace by activating the checkbox in the *Extra workspaces* column.

If this workspace contains a document with a listview of the "Events" objects, the new object will not be visible until this checkbox has been checked. The object will become visible once the checkbox has been checked.

- 7 You have completed this procedure.

14 Displaying objects and including objects in templates

In Chapter 13 we described how to create object classes, how to assign a template to a class, and how to create objects. In this chapter we shall discuss the template code and we:tags that you can use to include objects in your templates so they can be published on a web page.

The display of objects as a list or in a detailed display in the front end is always done by means of templates and documents. If you want to display stored objects, you will have to create a document based on a template that contains the corresponding listview or fields for a detailed display.

The following list draws upon what was treated in Chapter 13 and it outlines a suggested order for performing the procedures required to create *and* publish objects.

1. Create an object class
2. Assign a detail template to the class
3. Create a detail template (to display the object when linked to/from a listview)
4. Create an object
5. Create a template that can search for an object. (listview)
6. Create a web page from the template made in step 5

In this chapter we shall focus on Steps 3 and 5. For details on Step 6, see the *webEdition User Guide*.

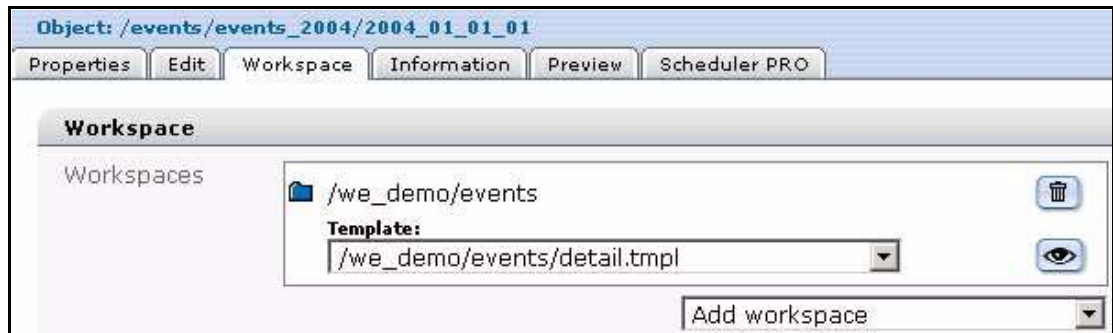
14.1 Displaying objects: an overview

Objects themselves do not contain any layout information or other display options, therefore, you must always link an object to a webEdition document. If you want a summary of the objects, you first must create a template that contains a corresponding listview. Thereafter you can use the template to create a document.

If, for example, you want to display an object in the "Events" workspace, you first must save a corresponding document (summary.php) with a listview of all objects of the "Events" class in a directory within this workspace. If the document (summary.php) is saved outside of this workspace, the listview will not find any objects.

To display an object in detail, you must link the object to an appropriate template. You can do so in the *Workspace* view. Once the workspace has been assigned, you can select the template for the detailed view of the object (see Figure 260).

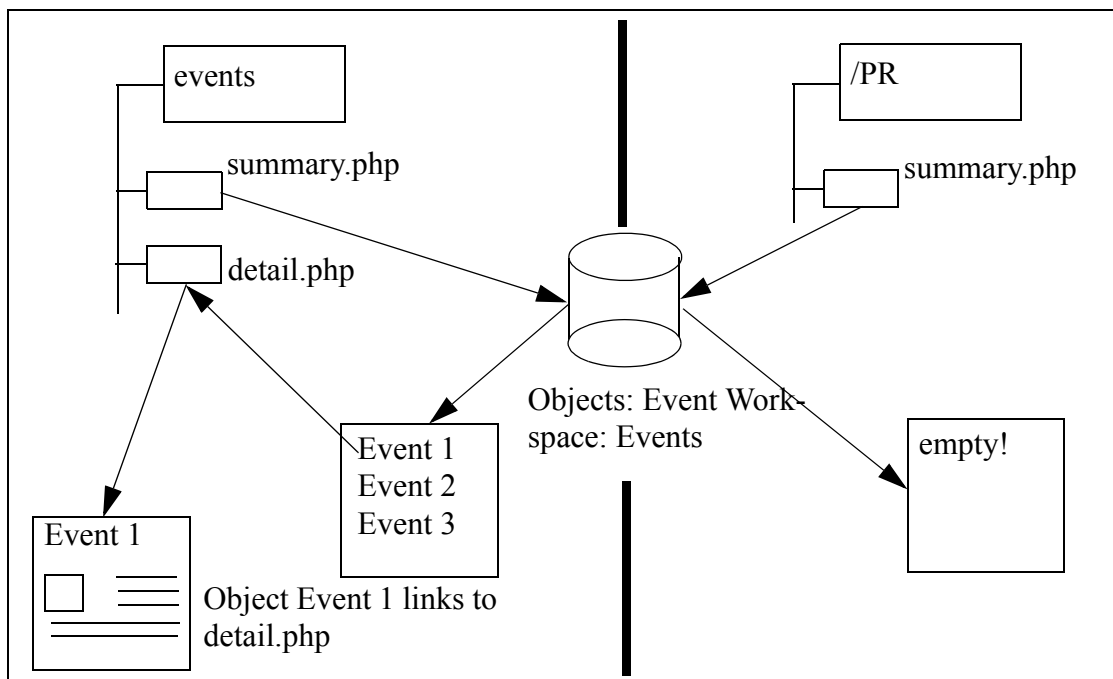
Figure 260 Selected template



Once you have selected a template, the object will always be displayed in the frontend with this template whenever the link is clicked in the listview. You can select a different template for each selected workspace.

Figure 261 is a schematic diagram of workspaces and assigned templates for objects. In this case, only the "Events" workspace has been assigned to the "Events" object class.

Figure 261 Diagram of workspaces and templates



For more information, see Section 14.4, "Displaying an object in a document using the `<we:listview>` tag" on page 232.

14.2 Database/Object Module we:tags

There are four tags that you can use for including objects in your templates:

- `<we:author>`
- `<we:ifNotObject>`
- `<we:ifObject>`
- `<we:object>...</we:object>`

The Database/Object Module also expands the capability of existing we:tags to include new attributes:

- `<we:field type="select">`
- `<we:input type="select">`
- `<we:listview type="search">`
- `<we:listview type="object">`
- `<we:var type="select">`

For information about these tags, see *The webEdition Tag Reference Manual*, which is available on-line at the following URL: <http://www.webedition.biz>

14.3 Creating an object summary

webEdition allows you to create object summaries by using the `<we:listview>` tag. After installing the Database/Object Module, the *object* attribute can assist you in creating summaries of objects. The following code example shows you how to use the `<we:listview type = object>` tag. The template output appears in Figure 262, "Template output" on page 232.

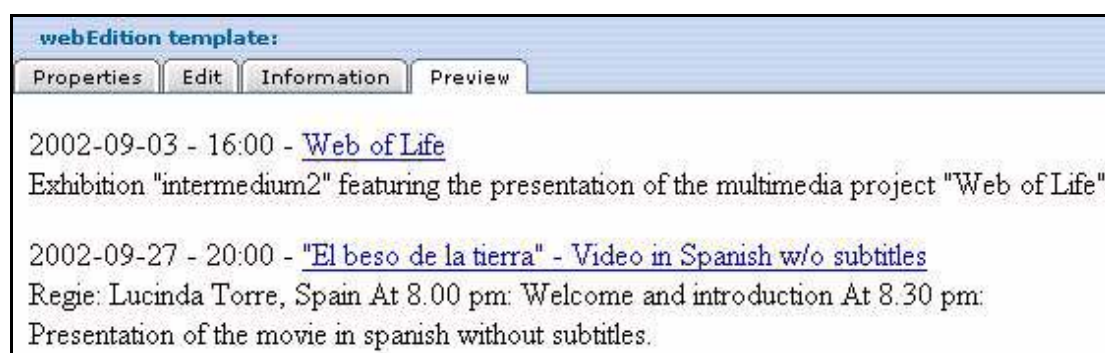
```
<we:listview type="object" classid="2" rows="4" order="EventDate">
  <we:repeat>
    <p>
      <we:field type="date" name="EventDate"> -
      <we:field name="EventName" hyperlink="true"/>
      <br>
      <we:field name="EventDescription">
    </p>
  </we:repeat>
</we:listview>
```

This code generates a summary of all objects from the "Events" object class. The "Events" object class has the ID=2. The list will be sorted by the "EventDate" class field.

The list will display:

- the "EventDate" field
- a hyphen "-"
- the "EventName" field
- the "EventDescription" field

The "Event Name" (`hyperlink="true"`) field is linked to the template that has been assigned to the object class in the *Workspace* view.

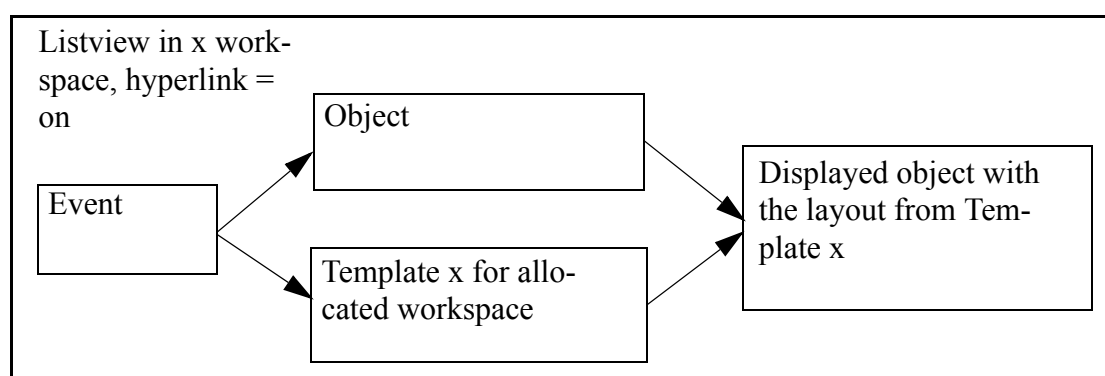
Figure 262 Template output

14.4 Displaying an object in a document using the <we:listview> tag

To display an individual object in a document, you first have to assign a template to the object class. This can be done when defining the object classes in the *Workspace* view in *Edit* mode. As described in Section 12.7.2, "Displaying objects in the front end" on page 216, a workspace is allocated to an object class in which the objects can be displayed. A default template for the detailed display of the object is also allocated. If you have assigned several workspaces to an object class, you can also assign several default templates so that the object can have different templates, that is, layouts or levels of information, depending on which workspace it is displayed in.

The link is always created in conjunction with a listview as seen in the sample code in Section 14.3, "Creating an object summary" on page 231.

Because of the `hyperlink="true"` attribute, the Event Name is defined as a link that points to the default template defined in the *Workspace* view of the object class for the workspace where the document with the listview has been stored. It also points to the object listed in the listview. Clicking on this link will combine and display the object data and the template as shown in Figure 263.

Figure 263 Example: hyperlink="true"

The variable of the name attribute in the `we:tag <we:field>` must be absolutely identical with the desired field name of the object. (This tag is case-sensitive.)

14.5 Displaying an object in a document using the <we:object> tag

You can include individual objects directly in documents without listing them in a listview. This is advisable, for instance, if you have an "Events" template in which your

editors manually enter the event details and then insert the address where the event is to be held. You must insert the we:tag `<we:object>` below the text entry fields for the event. With this tag, you can give editors the ability to select certain objects in a class. You must always specify an object class. Defining both the class and the specific object will cause this object to be shown in this document. This is done using the we:tags `<we:object>` and `<we:field>`. For more information, see the descriptions of the `<we:object>` and `<we:field>` tags in *The webEdition Tag Reference Manual*.

```
<we:object name="myObject" classid="77" id="324">
  <p>
    <we:field name="name1" hyperlink="true"/><br>
    <we:field name="text"/>
  </p>
</we:object>
```

This code always displays the same object in the class that possesses the `classid="77"` and the object that has the `id="324"` without permitting the editor to change anything.

```
<we:object name="myObject" classid="77">
  <p>
    <we:field name="name1" hyperlink="true"/><br>
    <we:field name="text"/>
  </p>
</we:object>
```

In this case, the editor can select any object from all objects that exist under the object class that has the `classid="77"`. The editor will see the following display in the front end (see Figure 264):

Figure 264 Displaying an object



Clicking the select button will cause the file manager to open so that the editor can select an object of `classid="77"`.

The `<we:field>` tag can be used to define which object field should be displayed. The variable of the name attribute in the we:tag `<we:field>` must be absolutely identical to the desired field name of the object. (This tag is case-sensitive.)

15 Editor PlugIn: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Editor Plug-in Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Editor Plug-in Module. These topics are treated in the following sections:

- Section 15.1, "What is the webEdition Editor Plug-in Module?" on page 235.
- Section 15.2, "Requirements, installation and licensing" on page 235.
- Section 15.3, "User preferences for the Editor Plug-in" on page 237.

15.1 What is the webEdition Editor Plug-in Module?

The Editor Plug-in enables you to create webEdition pages and templates using an HTML editing program of your choice. You can choose either to create your webEdition documents entirely in webEdition or to use another HTML editor. The entries/changes you make in your HTML editor will be automatically implemented by webEdition, eliminating the need to copy and paste them using the clipboard.

15.2 Requirements, installation and licensing

You must meet or exceed the following requirements to use the Editor Plug-in:

- PC with Microsoft Windows 95 or higher
- webEdition, version 2.0 or higher
- Microsoft Internet Explorer 4.x or higher
- Internet access during the installation

After purchasing a licence for the Editor Plug-in from the webEdition on-line shop, you must register your version online the first time it is run on your computer (see Figure 265, "Initial registration window" on page 236).

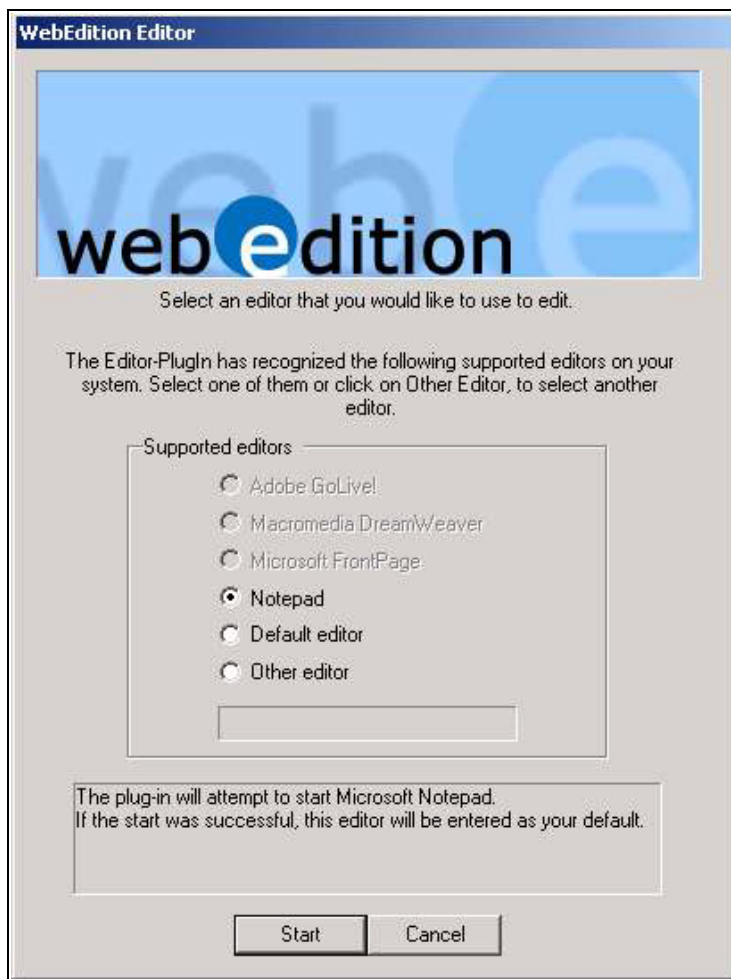
Figure 265 Initial registration window

Note: You do not have to download the Editor Plug-in separately. The first time you use webEdition, it will automatically download the Plug-in from our server.

Once you have registered and you have received confirmation that the registration was successful (see Figure 266), the Editor Plug-in will be available for your browser.

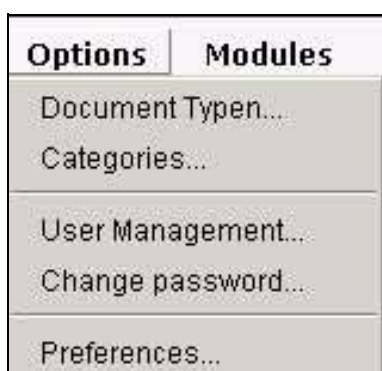
Figure 266 Successful registration of the Editor Plug-in

The first time you access the Editor Plug-in, you will be asked to choose your preferred editing application (see Figure 267).

Figure 267 Choosing a supported editing application

15.3 User preferences for the Editor Plug-in

After registering the Editor Plug-in, you can adjust the user preferences to change the behavior of the module. Go to the *Options* drop-down menu in the webEdition main page and select *Preferences...* (see Figure 268).

**Figure 268 The Options menu**

The system opens the *Preferences* screen. Click the *Editor* tab on the *Preferences* screen to access the *Editor* view (see Figure 269):

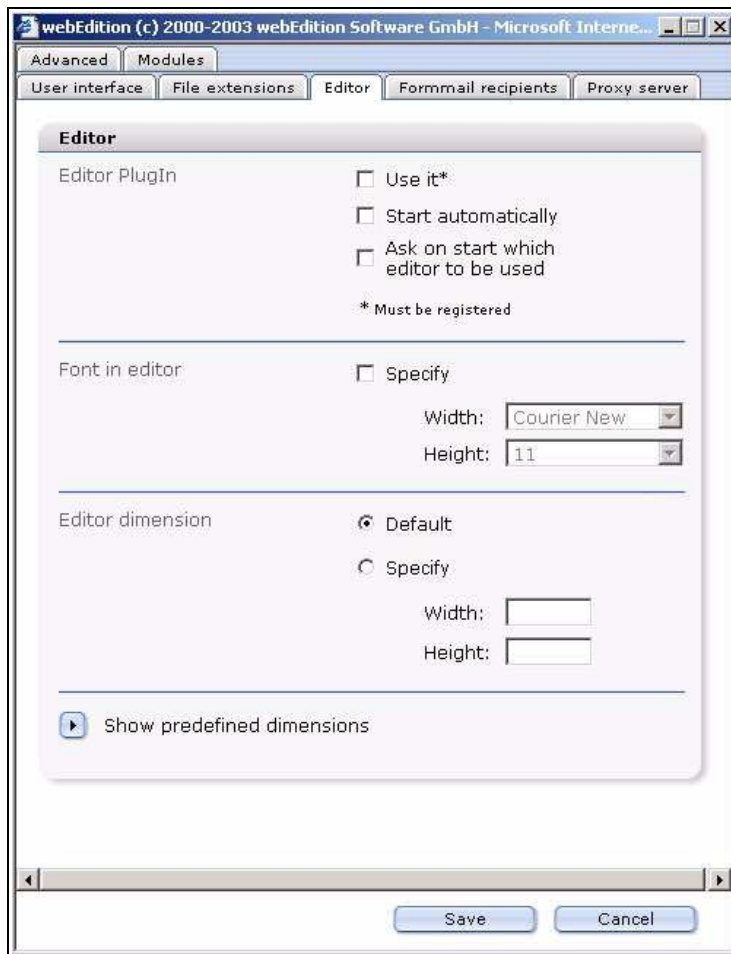


Figure 269 Editor preferences view

There are three options you can use to modify the behavior of the Editor Plug-in. The following checkboxes appear in the *Editor* view:

- *Use it.* Activate this option if you wish to use the Plug-in. The Plug-in must be registered before it can be used.

- *Start automatically.* Activate this option if you generally use your HTML editor rather than webEdition to edit your templates. If you have already specified your preferred HTML editing program, it will be launched automatically whenever you wish to edit any templates.

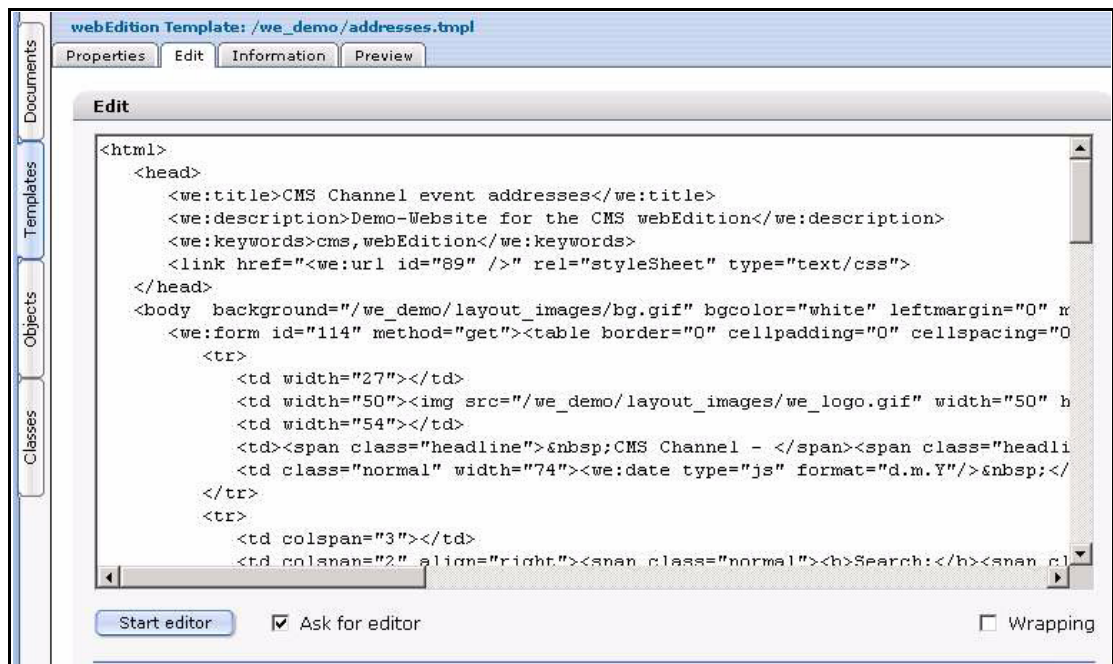
- *Ask on startup which editor should be used.* Activate this option if you use more than one HTML editing program and wish to switch between editors. Activating this option will open a dialog box whenever you start the editing program, asking you which HTML editor you wish to work with. If this option is not activated, webEdition will always start the editing program you last selected.

Note: If you are not using Internet Explorer 4.x or higher (see Section 15.2, "Requirements, installation and licensing" on page 235), the Editor Plug-in options will appear greyed-out. You will also see the following message: *These settings cannot be changed. The Editor PlugIn operates only with the Windows version of Internet Explorer.*

15.3.1 Setting a default editing program

To set a default editing program, select the option *Ask on startup which editor should be used* and select your preferred editing program.

You can also re-set your default editor by selecting the *ask for editor* checkbox that appears next to the *Start editor* button directly under the text editing area of the *Templates > Edit* view (see Figure 270).

Figure 270 The *Start editor* and *Ask for editor options*

Once you have re-set your default editor, when you click the *Start editor* button in the *Templates > Edit* view, the last editing program that you selected will automatically start. (You must, however, make sure that the *Ask on startup which editor should be used* checkbox is not activated). For further details, see Chapter 16, "How to use the Editor Plug-in" on page 241.

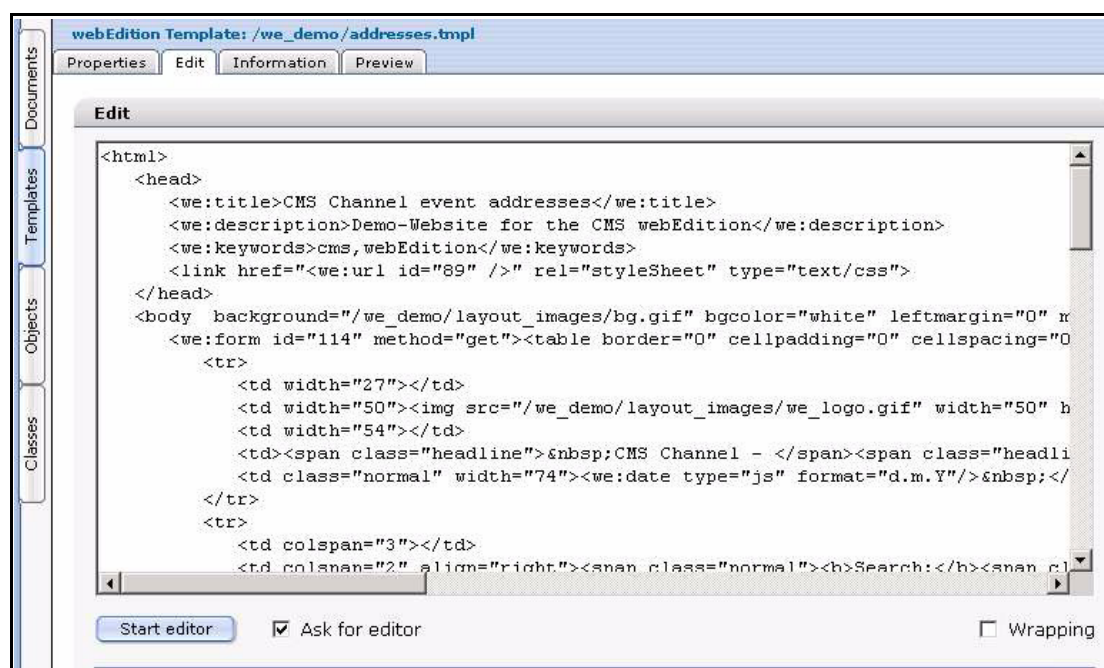
16 How to use the Editor Plug-in

You can either create your webEdition documents entirely in webEdition or you can use the Editor Plug-in to access another HTML editing program of your choice.

16.1 Starting the Editor Plug-in

Depending on the preferences you have selected, your default HTML editing program can be started manually or automatically. You can also select a preferred editing program. (see Section 15.3.1, "Setting a default editing program" on page 238). Whenever you edit templates (*File > New > Template*, then click the *Edit* tab), you will see the *start editor* button under the code entry window (see Figure 271).

Figure 271 The Start editor button



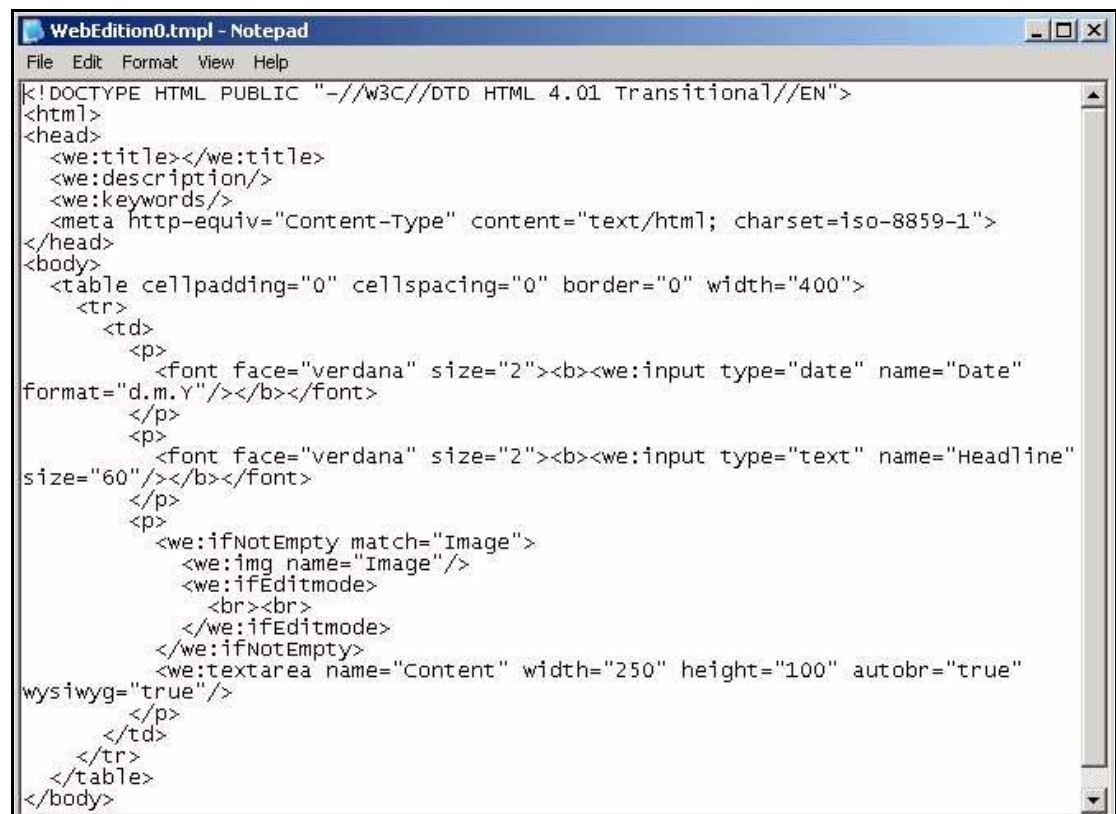
There is also an *Ask for editor* checkbox that allows you to specify your preferred editing program. This box will have a check mark if you have already selected the *Ask on startup which editor is to be used* option in the *Options > Preference > Editors* view. If you have not activated the *Ask on startup...* check box, the editing program selected during the installation will start.

16.2 Using an HTML editor

Your preferred HTML editor operates seamlessly with webEdition. After activating the Editor Plug-in and choosing an editor, whenever you open a webEdition template, any webEdition code already contained in the entry window will appear automatically in your editing program entry window.

In the following example (see Figure 272), the Microsoft Notepad application has been selected as the default editor.

Figure 272 Using a third-party HTML editor



```
WebEdition0.tmpl - Notepad
File Edit Format View Help
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN">
<html>
<head>
  <we:title></we:title>
  <we:description/>
  <we:keywords/>
  <meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
</head>
<body>
  <table cellpadding="0" cellspacing="0" border="0" width="400">
    <tr>
      <td>
        <p>
          <font face="verdana" size="2"><b><we:input type="date" name="Date"
format="d.m.Y"/></b></font>
        </p>
        <p>
          <font face="verdana" size="2"><b><we:input type="text" name="Headline"
size="60"/></b></font>
        </p>
        <p>
          <we:ifNotEmpty match="Image">
            <we:img name="Image"/>
            <we:ifEditMode>
              <br><br>
            </we:ifEditMode>
          </we:ifNotEmpty>
          <we:textarea name="Content" width="250" height="100" autobr="true"
wysiwyg="true"/>
        </p>
      </td>
    </tr>
  </table>
</body>
```

You can then use your editing program in the usual manner (see your vendor documentation for details). Whenever you save any entries or changes in your editing program, those changes are automatically imported to the *Edit* window in webEdition.

17 Export Module: Introduction

This chapter is intended to help you familiarize with the webEdition Export Module and its features. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Export Module. These topics are treated in the following sections:

- Section 17.1, "What is the webEdition Export Module?,"
- Section 17.2, "Installation,".
- Section 17.3, "General information and navigation,".

17.1 What is the webEdition Export Module?

The Export Module allows webEdition users more control over the exporting of documents, templates, objects and classes from webEdition.

Contrary to the export function of the standard version of webEdition, you can define exactly, which individual parts of your project should be exported.

The import of the content that is exported with the Export Module is possible with every version of webEdition (from version 3.3), no separate module is required.

Importing new templates, objects or content is easily accomplished without interfering with existing content.

The Export Module is intended for users who want to maintain several webEdition web sites within one webEdition installation, as it enables the advanced user to export and import objects, document, classes and templates without interfering with the existing data.

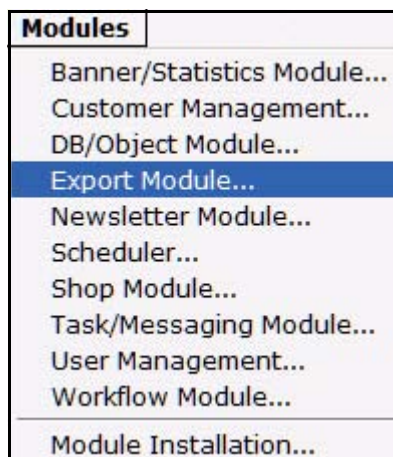
17.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

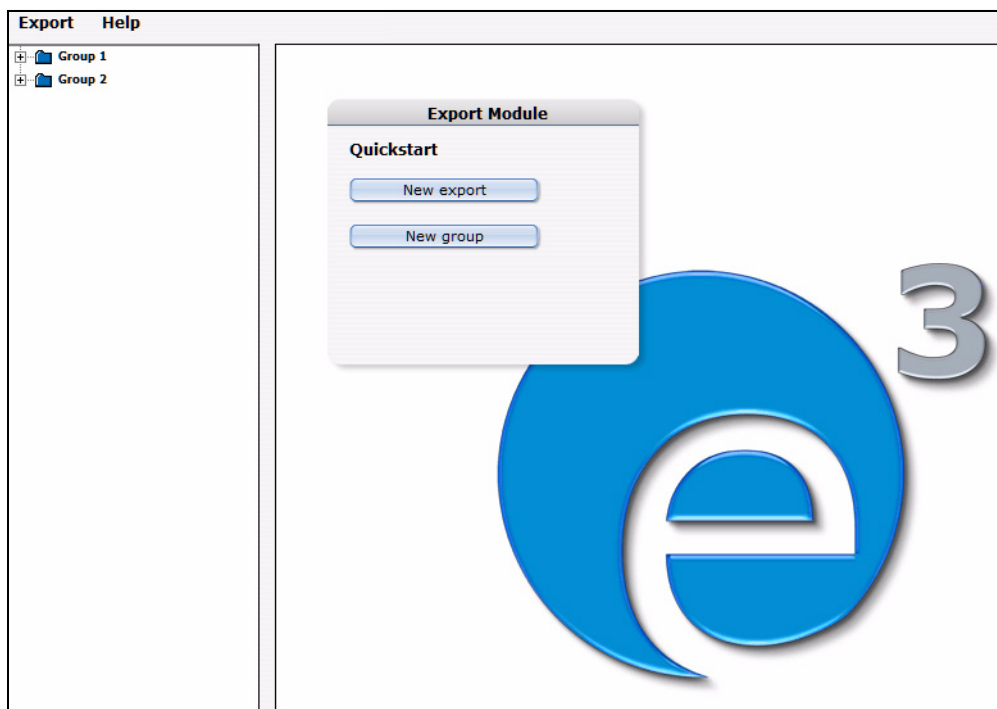
17.3 General information and navigation

After the installation, a new menu item appears in the webEdition *Modules* menu. See Figure 273.

Figure 273 Modules Dropdown Menu

17.4 Start Module

To open the Export Module, click on *Export Module...* from the *Modules* Dropdownmenu on the webEdition mainscreen. The Quickstart screen will appear, as shown in Figure 274.

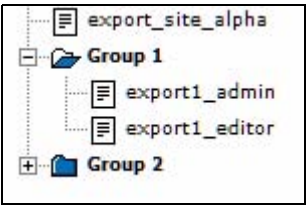
Figure 274 Export Module: Quickstart Screen

In the *Quickstart* screen, you can directly create a new export-profile or a group.

17.4.1 Export Module explorermenu

The explorermenu on the left hand of the screen shows a list of your exportprofiles and groups (see Figure 275).

Figure 275 Export Module explorer menu



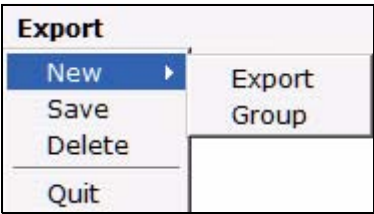
17.5 The menus

By selecting *Modules > Export Module*, you open the module view (see Figure 274). Here, you can find the dropdown-menus *Export* and *Help*.

17.5.1 The *Export*-dropdownmenu

In the dropdownmenu *Export*, the following items are located (see Figure 276).

Figure 276 *Export* dropdownmenu



- *New (Export/Group)* Click *New > Export / Group* to define a new exportprofile resp. a new exportgroup.
- *Save* Click *Save* to permanently save your export or exportgroup.
- *Delete* Deletes the currently selected export or group.
- *Quit* Leave the module window and return to the webEdition main screen.

17.5.2 *Help*-dropdownmenu

In the help-dropdownmenu you will find the following items (see Figure 277).

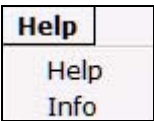


Figure 277 *Help*-dropdownmenu

- *Help*. This item provides Help screens.
- *Info*. This item provides information about the application.

17.6 Export Module views

The export module has the following views which can be accessed by clicking on the corresponding tabs: *Property*, *Options* and *Details*.

17.6.1 The *property* view

The basic settings for your export are defined in the *property* view.

Choose *Export > New > Export* to enter the *property* view (see Figure 278):

Figure 278 The *Property* view

The *Property* view consists of the areas *Property*, *Export to* and *Selection*.

- *Property*: Here, you give your export profile a unique name. You can also assign your export to a *group* by clicking on the *select* button. The name given here is the name by which the export profile is saved within the webEdition export module, not the file name by which the export is saved on the server or your local disc!
- *Export to*: Enter a filename for your export-file. This is the name by which the file is saved on your server or harddisc. If you choose *Server* from the dropdownmenu, you can select a directory on your server, where the exported file will be saved.
- *Selection*: Here, you can select the documents or objects to be exported. Choose *Automatic Selection* to define the export using the document- or objecttype. When using the *Manual Selection*, documents, templates, objects or classes can be selected individually from the tree.

17.6.2 The *Options* view

The *Options* view consists of the areas *Documents/Templates*, *Objects/Classes*, *Doctypes/Categories*, *Export Depth* and *Owners Data* (see Figure 279). These areas are explained in the following.

Figure 279 The Options view

Export: weExport_1115041759

Property Options Details

Documents Templates

The default template is the template that is defined in the document p ...

☐ Export default templates

☐ Export included documents

☐ Export included objects

☐ Export linked documents

Objects Classes

The default class is the class that is defined in the object properties.

☐ Export default classes

☐ Export embedded objects

Doctypes/Categorys

☐ Doctypes

☐ Categorys

Export depth

The export deep defines the level for the export of the included documents. The field must be a number!

to level

Owners data

Export linked owners data.

☐ Export owners data

Save Export

17.6.2.1 The Documents/Templates area

In this area, the following checkboxes are located:

- *Export default templates*: Activate this checkbox to add the templates, on which the documents to be exported are based by default (this is set in the document preferences), to the export.
- *Export included documents*: Activate this checkbox to add so-called included documents to the export. Included documents are included in the document to be exported using the we:tags *we:include*, *we:form*, *we:url*, *we:linkToSeeMode*, *we:a*, *we:href*, *we:link*, *we:css*, *we:js*, *we:addDelNewsletterEmail*. This checkbox has to be activated, e.g., if the navigation of your site was integrated using an include and you want it to be in the export.
- *Export included objects*: This checkbox works like the checkbox *Export included documents*, but for objects. It affects included objects using the we:tags *we:object* or *we:form*.
- *Export linked documents*: Activate this checkbox to add internal documents to the export; internal documents are linked to the document to be exported by using the HTML-Tags *body*, *a*, *img*, *table*, *td*.

Note: These functions only apply to the export of documents and templates.

17.6.2.2 The *Objects/Classes* area

These two checkboxes are located in this area:

- *Export default classes*: Activate this checkbox to also export the class defined in the object properties.
- *Export embedded objects*: Activate this checkbox to also export objects which are included in the object to be exported.

Example

You included images as objects into an object of the class “articles”.

Note: These functions only apply to the export of objects and classes.

17.6.2.3 The *Doctypes/Categories* area

In this area you will find the following checkboxes:

- *Doctypes*: Activate this checkbox to add the doctypes of the exported documents to the export. This function only applies to the export of documents.
- *Categories*: If this checkbox is activated, the categories of the elements to be exported are also added to the export. This function applies to document- as well as to object categories.

17.6.2.4 The *Export depth* area

In this area, you can define, using a numerical value, the export depth of included, linked or template-based elements. If, e.g., you set the export depth to a value of “1”, at the export of a document with the checkbox *Export default templates* activated, will result in the template being included in the export. An included navigation (and its template), on the other hand, would not be included, even with the option *Export included documents* activated. To export the navigation, too, you would have to set the depth to “2”; setting it to “3” will also include the template of the navigation.

17.6.2.5 The *Owners data* area

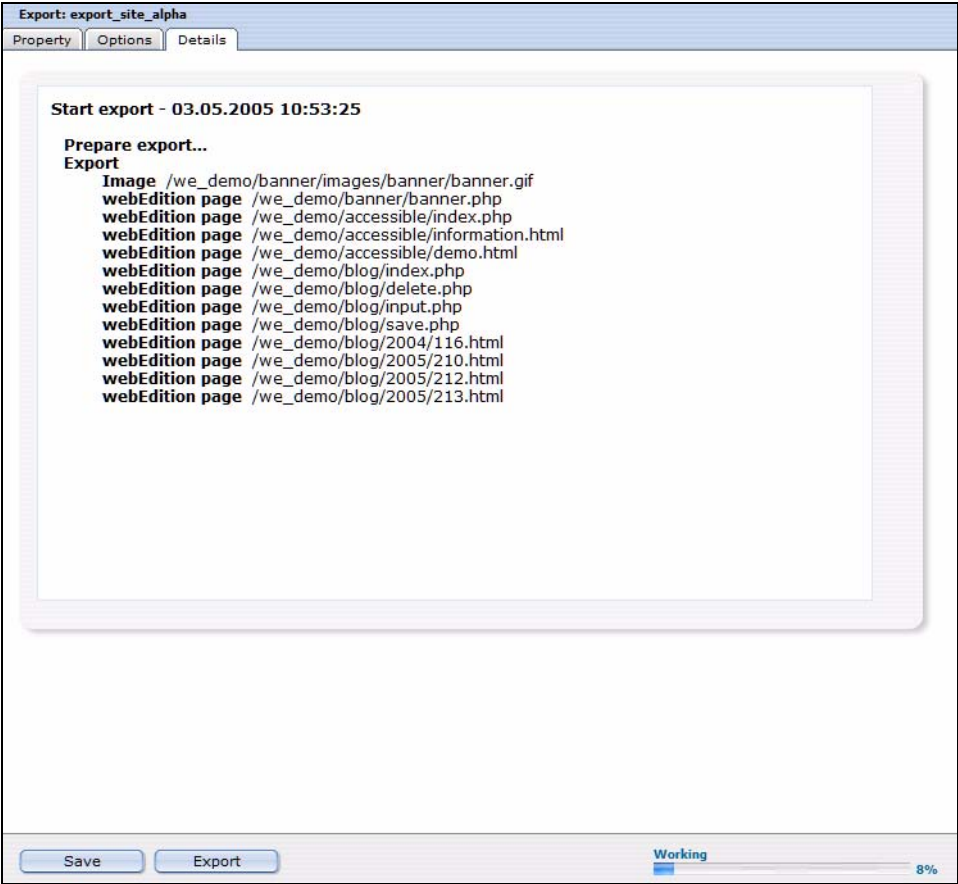
Activate the checkbox *Export owners data*, to integrate permissions and rights on documents, objects etc. in the exported file.

Note: The webEdition User Management (PRO) has to be installed for this function to work.

17.6.3 The *Details* view

In this view, the progress of the export will be displayed. All exported documents, templates, objects and classes are displayed here during the export process. The progress bar at the bottom of the screen indicates the export’s progress.

Figure 280 Details view



18 Using the Export Module

In this chapter, you will learn how to perform an export with the webEdition Export Module.

18.1 Define a new export

Exports with the webEdition Export Module are performed using so-called export profiles. Click *Export > New > Export* or just *New Export* in the Quickstart screen, to create a new export profile.

Procedure 31 Performing an export

In the Export Module mainscreen

- 1 Choose names for your export profile and the export file. Enter them in the corresponding fields in the *Property* view.
- 2 Choose a target location for your export file using the dropdownmenu in the *Export to* area: *Server* or *local Harddisc*.
- 3 Now you decide in the *Selection* area, whether you prefer *automatic* or *manual Selection*. The manual Selection lets you select documents, templates, objects and classes from the webEdition tree-view. Using the *automatic selection* lets you choose by "type".

Note: Objects and classes can only be exported if the webEdition DB/Object Module is installed.

- 4 When you feel comfortable with your selections, proceed by clicking on the *Options* tab.
The Options view opens
- 5 Now select your preferred options. Further information about the *Options* view can be found in Section 17.6.2, "The Options view" on page 246.
- 6 Click on the *Save* button
The successful saving of your export profile is confirmed

Note: Your export profile has to be saved before the export can processed.

- 7 Click on the *Export* button
The Details view opens (see Figure 280)
- 8 According to your selections made in 2, the generated export XML-file will be saved by the filename you choose either on the server, or you will be prompted to define a target location on your local harddisc.
- 9 The Export thus has finished successfully.

18.2 Exportgroups

Exportgroups are used to organize recurring export tasks; the parallel development for multiple webEdition websites from one developer license can be made much easier by using this feature.

Procedure 32 Create Exportgroup

In the Export Module window

- 1 Select *Export > New > Group* from the *Export* Dropdownmenu or *New Group* from the Quickstart

The Exportgroup window opens

- 2 Enter a name for the new exportgroup; you might e.g. name the groups after the websites in development.
- 3 Click the *Save* button

The system acknowledges the success. The new group is now displayed in the explorer menu (see Figure 281)

Figure 281 New group in the explorer menu



- 4 The new exportgroup has been successfully created. You can now assign export profiles to this group. The procedure is finished.

19 Newsletter Module: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Newsletter Module. This chapter treats what the module does and how to install it. You can also find information here about their basic layout and command features. These topics are treated in the following sections:

- Section 19.1, "What is the webEdition Newsletter Module?" on page 253
- Section 19.2, "Installation" on page 254
- Section 19.3, "General information and navigation" on page 254

19.1 What is the webEdition Newsletter Module?

The webEdition Newsletter Module allows webEdition users to create, maintain, and send newsletters to a targeted audience.

The Newsletter Module conforms to the basic layout and programming principles of webEdition. The Newsletter Module can only be used with webEdition (although you can import/export mailing lists from third-party E-mail applications).

This module can be used by anyone who has a basic knowledge of how webEdition functions.

The Newsletter Module allows you to perform the following content management functions:

- create, change, copy and send newsletters
- define content from a variety of sources
- create customized receiver lists for individual newsletters
- filter your customer selection for refinement of your target audience
- preview each mailing list
- import/export E-mail addresses from/to other E-mail applications
- establish and maintain a *Black list*
- search E-mail
- maintain multiple directories (called newsletter groups) where you can store a variety of newsletters, allowing you to create and organize several newsletters and mailing campaigns

The Newsletter Module also allows you to perform the following diagnostic functions:

- test your mailing process before sending your newsletter
- test your mail by sending it to a test address
- check the syntax and domain names for each address in your mailing lists
- recover an interrupted mailing campaign if a network or connection failure occurs
- view details about your newsletter campaign in log reports.

If you have purchased the webEdition Customer Administration Module an additional feature is available to you. You can reuse the customer data stored in your customer administration database to create your mailing lists.

19.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

19.3 General information and navigation

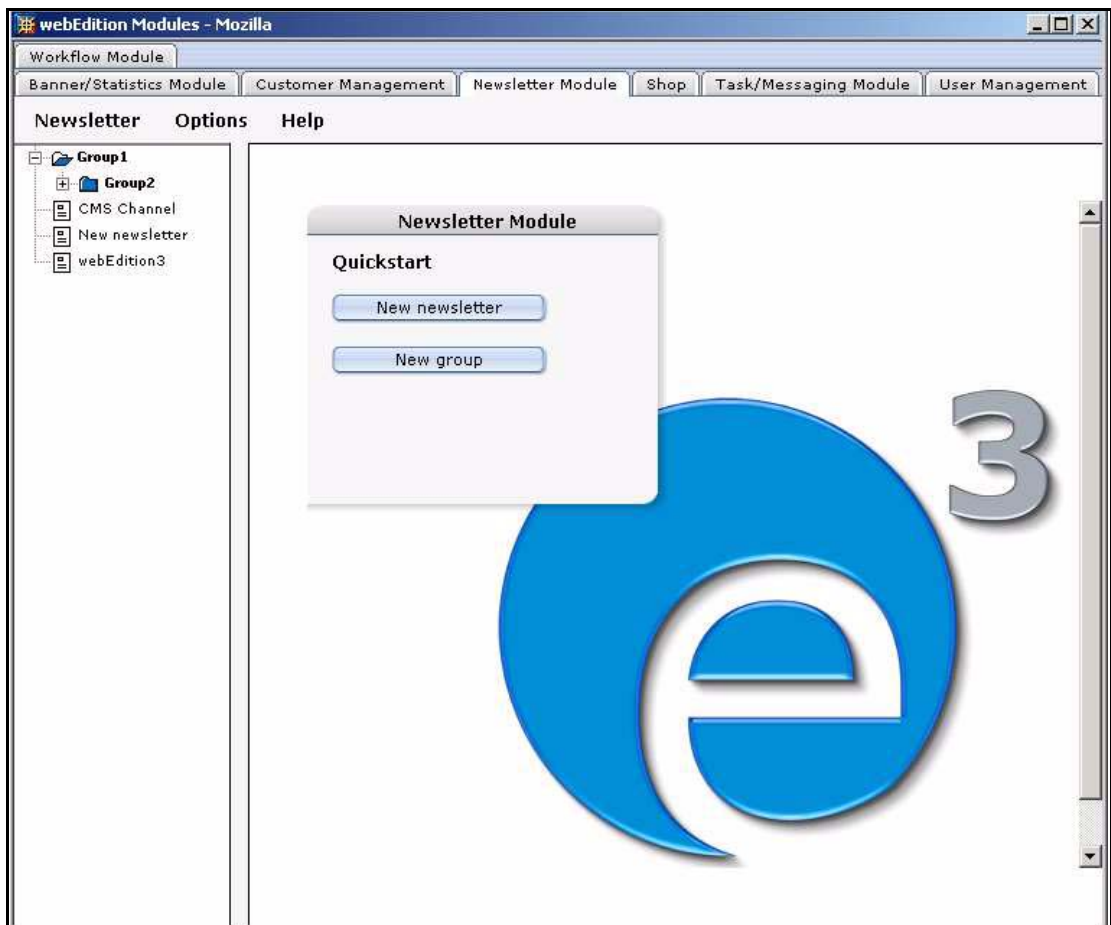
Once you have installed the Newsletter Module, *Newsletter* will appear as an option in the *Modules* drop-down menu (see Figure 282).

Figure 282 Modules drop-down menu



19.3.1 Opening the module

To open the module, select *Newsletter* from the *Modules* drop-down menu on the main webEdition page. The *Newsletter Quickstart* screen opens as seen in Figure 283.

Figure 283 Newsletter Module: main screen with *Quickstart* options

Using the *Quickstart* screen, you have the option of going directly to a new newsletter or to a new newsletter group. You can return to the Quickstart screen at any time by clicking on the Newsletter Module tab.

19.3.2 The Newsletter Module main page: drop-down menus

There are three drop-down menus on the Newsletter Module main page: *Newsletter*, *Options*, and *Help*.

19.3.2.1 The *Newsletter* menu items

The *Newsletter* drop-down menu has the following items (see Figure 284):

**Figure 284 Newsletter menu items**

- *New*. Use this command to create a new newsletters or group.
- Newsletter*. Use this command to create a newsletter.
- Group*. Use this command to create a new newsletter group.

- *Save*. Use this command to save a newsletter.
- *Delete*. Use this command to delete a newsletter.

- *Send*. Use this command to send a newsletter.
- *Quit*. Use this command to exit the application.

19.3.2.2 The *Options* menu items

The *Options* drop-down menu has the following items (see Figure 285, "The Options menu items" on page 256):

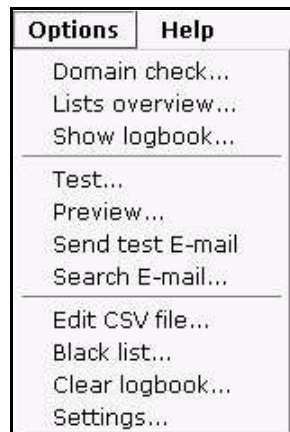


Figure 285 The *Options* menu items

- *Domain check*. Use this option to test your mailing list before starting your newsletter campaign.
- *Lists overview*. Use this option to see the contents of your mailing lists.
- *Show logbook*. Use this option to display newsletter campaign logs.
- *Test*. Use this option to test a newsletter campaign.
- *Preview*. Use this option to view a newsletter before you send it.
- *Send test mail*. Use this option to test your newsletter campaign.
- *Search Email*. Use this option to search an E-mail address.
- *Edit CVS file*. Use this option to edit a comma separated values (CSV) file.
- *Black list*. Use this option to edit the *Black list*.
- *Clear logbook*. Use this option to clear the newsletter campaign logs.
- *Settings*. Use this option to set default parameters and mailing addresses.

19.3.2.3 The *Help* sub menus

The *Help* drop-down menu has the following items (see Figure 286, "The Help menu items" on page 256):



Figure 286 The *Help* menu items

- *Info*. Information about the application.
- *Help*. Help screens.

19.3.3 The newsletter explorer menu and main page

The explorer menu appears on the left side of the screen. It contains a list of your newsletter files and newsletter groups. See Figure 283, "Newsletter Module: main screen with Quickstart options" on page 255.

The Newsletter main page has three available views:

- *Properties*. Use this view to set up your newsletter files.
- *Mailing list*. Use this view to create your newsletter mailing lists
- *Edit*. Use this view to define the layout of your newsletter.

19.3.3.1 The newsletter *Properties* view

The *Properties* view allows you to set up your newsletter files and to define your newsletter mailing lists. The *Properties* view is divided into three areas: *Path*, *Newsletter* and *Copy newsletter*, as seen in Figure 287.

Figure 287 The *Properties* view

The screenshot shows a 'Properties' dialog box with the following fields and controls:

- Path section:**
 - Name:** Text field containing 'New newsletter'.
 - Directory:** Text field containing a backslash '\', with a 'Select' button to its right.
- Newsletter section:**
 - Subject:** Empty text field.
 - Sender:** Text field containing 'mailer@meineDomain.de'.
 - Reply-to:** Text field containing 'reply@meineDomain.de', with an unchecked checkbox 'Same as the sender' to its right.
 - Test E-mail:** Text field containing 'test@meineDomain.de'.
- Charset:** A dropdown menu showing 'ISO-8859-1' and 'ISO-8859-1 - Western European (West Europe)'.
- Copy newsletter section:** A 'Select' button.

19.3.3.1.1 The Path area The *Path* area of the *Properties* view has the following functions:

- *Name*. Use this field to give a name to your newsletter.
- *Directory*. Use the *Select* button adjacent to this field to select a directory or group for your newsletter.

19.3.3.1.2 The Newsletter area The *Newsletter* area of the *Properties* view has the following functions:

- *Subject*. Use this field to describe the subject of the newsletter.
- *Sender*. Use this field to enter the default E-mail address of the newsletter sender.
- *Reply-to*. Use this field to enter the default E-mail address for replies to your newsletter.
- *Test email*. Use this field to enter the default test mail E-mail address.

Note: If you do not complete the fields for the sender, reply-to, or test E-mail address, the corresponding value for these fields will be generated automatically from your default settings. (For further information see Section 19.4, "Defining and changing user settings" on page 261.)

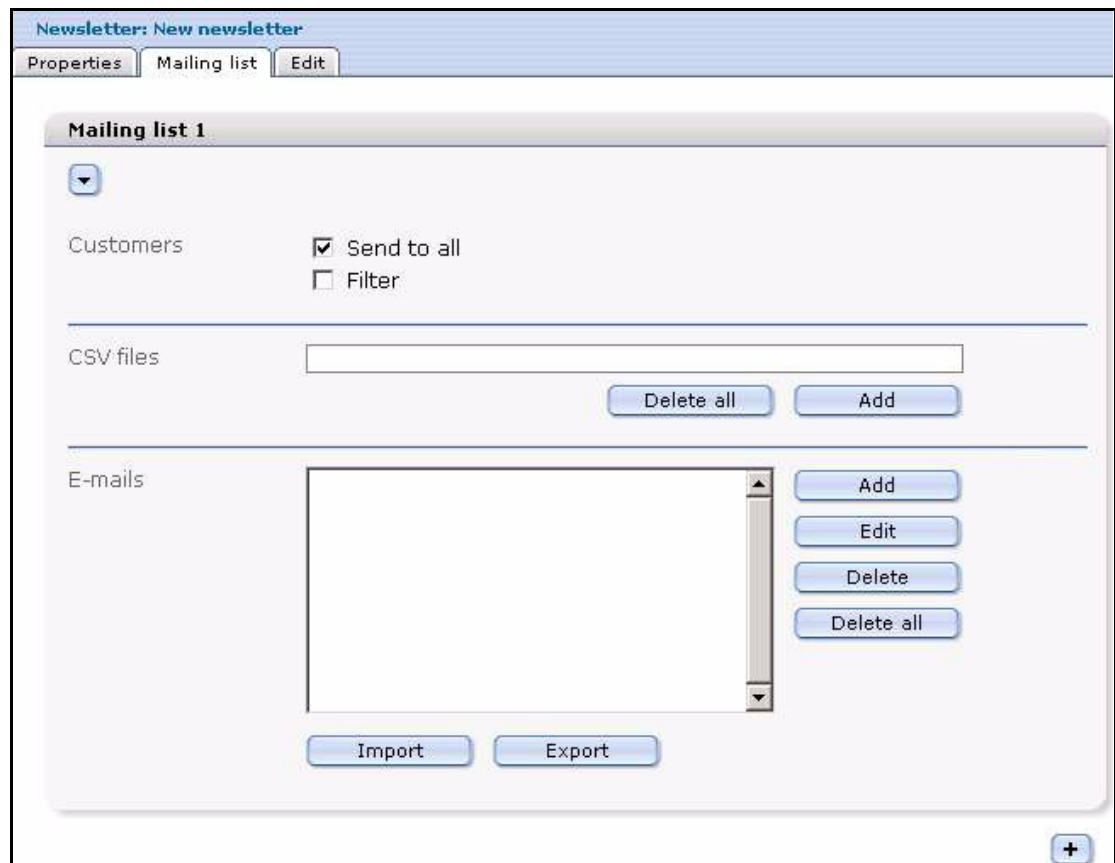
19.3.3.1.3 The *Charset newsletter* area The *Charset newsletter* area of the *Properties* view allows you to define the charset of the newsletter.

19.3.3.1.4 The *Copy newsletter* area The *Copy newsletter* area of the *Properties* view allows you to copy and re-use an existing newsletter.

19.3.3.2 The *Mailing list* view

The layout of the *Mailing list* view varies depending on the webEdition modules that you have installed.

Figure 288 The *Mailing list* view



19.3.3.2.1 The *Customers* area The top portion of the *Mailing list* view, the *Customers* area, appears only if you have purchased and installed the webEdition Customer Management Module. The following check boxes allow you to modify the recipients of your newsletter:

- *Send to all*. This button tells the Newsletter Module application to select all the E-mail addresses in your Customer Management database.

If this checkbox is not activated, two buttons appear that have the following functions:

- *Delete all*. Click this button if you wish to delete all customers from your list.
- *Add*. Click this button if you wish to add customers to your list.

- *Filter*. This button allows you to define filters for your current Customer Management Module database.

19.3.3.2.2 CSV Files area You can use the *CSV Files* field to enter a comma-separated values (csv) file into your mailing list. The newsletter will be sent to all of the E-mail addresses which are recorded in your selected csv file. The csv file must have the following format: E-mail address, HTML flag, salutation, title, first name, last name.

Under the list are two buttons which have the following functions:

- *Delete all.* Click this button if you wish to delete all customers from your list.
- *Add.* Click this button if you wish to add customers to your list.

If you have an entry in the *CSV File* field, two buttons will appear next to the filename:

- the pencil icon button. By clicking on this button, a new area will open in which you can edit a csv file.
- trash can icon button. If you click on this button, you will remove the csv file from your list.

19.3.3.2.3 Emails area Below the *CSV Files* area in the *Mailing list* view is the *Emails* area. The *Emails* text box is the area which displays the E-mail addresses associated with your mailing list. This area allows you to create multiple mailing lists in which you enter the E-mail addresses of your newsletter subscribers. You can use the buttons to the right of the *Emails* text box to perform the following operations on the subscriber list:

- *Add.* Adds an E-mail address to your mailing list.
- *Edit.* Edits an existing E-mail address in your mailing list.
- *Delete.* Deletes an E-mail address from your mailing list.
- *Delete all.* Deletes all E-mail addresses from your mailing list.

Directly below the E-mails text box are the following items:

- *Import.* Import E-mail addresses from a csv file.
- *Export.* Export E-mail addresses to a csv file.

19.3.3.2.4 Additional features in the Mailing list view Below the *Mailing list* are the following items:

- The plus icon "+" allows you to open another *Mailing list* area so that you can create additional mailing lists.
- The trash can icon allows you to delete an entire mailing list.

At the bottom of the page are the following buttons:

- *Save* button. Use this button to save the properties data that you have entered on the screen.
- Mail List Number select box. This pick list shows all of your mailing lists. (You can have several.) Use this pick list to navigate to an existing mailing list.
- *HTML* checkbox. The default setting for newsletters is plain text. Use this check box to change the format of the newsletter to HTML.

- *Preview* button. The preview button allows you to see a newsletter before you send it.

Note: You must save your settings before you can preview a newsletter.

- *Send* button: Use this button to send a newsletter.

19.3.3.3 The newsletter *Edit* view

The *Edit* view allows you to create and edit the layout of your newsletter (see Figure 289). The webEdition Newsletter Module uses "blocks" to help you build the content of your newsletter. A newsletter can be composed of one block or several blocks, depending on the type of content you wish to include.

Figure 289 The *Edit* view

The screenshot shows the 'Newsletter: New newsletter' window with the 'Edit' tab selected. The 'Edit' tab contains a form for 'Block 1'. The form has the following fields and controls:

- Name:** A dropdown menu showing 'Document-based'.
- Mailing lists:** A list box showing 'Mailing list 1'.
- Document:** A text input field with a 'Select' button to its right.
- Use default template:** A checked checkbox.
- Template:** A text input field with a 'Select' button to its right.
- Bottom right:** A plus icon (+) in a small button.

Each block of the *Edit* view has the following fields:

- *Name*. This select box allows you to choose the type and style of the content for your newsletter. More information about block types is available later in this chapter.

Note: The fields below the block type name will change depending on the type of block you choose.

- *Mailing lists*. All block types must be associated with a mailing list. The *Mailing lists* box shows the mailing lists associated with the block you have defined.

Below each block are the following items:

- The plus icon "+" allows you to open another *Block* area, so that you can create additional blocks.
- The trash can icon allows you to delete an entire block.

19.4 Defining and changing user settings

Before using the Newsletter Module, you must complete the information requested on the *Settings* screen. These settings define parameters such as the default mail accounts associated with your mailing campaign, address verification checking, and the default mailing format. These settings also tell the Newsletter Module what information you wish to draw from the Customer Management Module database.

Note: After entering your initial settings, you will also be able to change the information at a later time.

Use the following procedure to define your initial settings.

Procedure 33 Defining initial newsletter settings

In the Newsletter Module main screen

- 1 Go to the *Settings* screen by clicking on the *Options > Settings*.
The *Settings* screen appears (see Figure 290).

Figure 290 The Newsletter Module Settings screen

- 2 webEdition sends out newsletters via E-mail using an automated batch process that runs on a PHP server. There are limits set by your ISP to govern the length of time a PHP script can run on the server. Therefore you must limit the number of E-mails per batch, otherwise you may encounter time-out errors. Set the *Number of emails per load* field to 150.
- 3 The *Test account* field allows you to define the address of your default test account. Type the address of your test account in the dialogue box.

- 4 The *Default sender* field allows you to define the default address of the sender of the newsletter. Type the address of your default sender account in the dialogue box.
- 5 The *Default reply* setting allows you to define the default address for receiving replies to your newsletters. Type the address of the account which will receive replies to your newsletter.
- 6 The Newsletter Module allows you to address your recipients with a female salutation by using the *Female Salutation* field. Enter the exact value (such as Ms. or Ms) that you have used to define a female customer in the Customer Management database.
- 7 The Newsletter Module allows you to address your recipients with a male salutation by using the *Male Salutation* field. Enter the exact value (such as Mr. or Mr) that you have used to define a male customer in the Customer Management database.
- 8 *Cust. Email field.* Use this select box to choose the customer E-mail field from the Customer Management Module database.
- 9 *Customer HTML field.* Use the select box to choose the customer HTML field from the Customer Management Module database.
- 10 *Cust. Salutation field.* Use the select box to choose the customer salutation field from the Customer Management Module database.
- 11 *Cust. Title field.* Use the select box to choose the customer title field from the Customer Management Module database.
- 12 *Cust. Firstname field.* Use the select box to choose the customer firstname field from the Customer Management Module database.
- 13 The *Cust. Lastname field.* Use the select box to choose the customer lastname field from the Customer Management Module database.
- 14 Use the *Do not send if address is malformed* check box to prevent the system from attempting to send a newsletter to erroneously configured E-mail addresses.
- 15 Use the *Do not send if address can not be verified* check box to prevent the system from attempting to send a newsletter to an unverifiable E-mail addresses.
- 16 Use the *Create log when sending mail* check box to capture a report.
- 17 Use the *Default mail format is html* check box to select HTML format as the default setting for your newsletter campaigns.
- 18 Check box: English title format (without salutation). In English usage, unlike in German, a salutation such as Mr. or Mrs. does not precede a title (such as Dr.). If you have activated this checkbox and you have defined an E-mail address, a salutation, last name and a title, the contents enclosed within the <we:ifMale> or <we:ifFemale> tags will not be sent. In this case, rather, the salutation is sent with a neutral title and can be delivered enclosed with the <we:ifTitleAndLastName> tag.
- 19 You can use the optional *Default mailing list (CSV file)* to enter the path to a comma separated values (CSV) file that can be used as the default file for your mailing list.
- 20 Save your changes by selecting the *Save* button.
- 21 You have completed this procedure.

20 Creating newsletters

The webEdition Newsletter Module gives users great flexibility in creating and modifying newsletters and defining their target audiences. Use the following sub sections and procedures to create your mailing lists and newsletters.

20.1 Setting the properties for a newsletter

Use the following procedure to set the properties for a new newsletter.

Procedure 34 Setting the properties for a newsletter

At the Newsletter Module main page

- 1 Click on *Newsletter > New* to create new newsletter.
webEdition opens the Properties view (see Figure 291).

Figure 291 The Newsletter *Properties* view

Properties

Path

Name
New newsletter

Directory
\
Select

Newsletter

Subject

Sender
mailer@meineDomain.de

Reply-to
reply@meineDomain.de ☐ Same as the sender

Test E-mail
test@meineDomain.de

Charset
ISO-8859-1 ISO-8859-1 - Western European (West Europe) ▼

Copy newsletter
Select

- 2 Type the name of your newsletter in the *Name* field.
- 3 Type the subject of your newsletter in the *Subject* field.
- 4 Type the default E-mail address of the sender of the newsletter.

- 5 Type the default E-mail address to which you wish your newsletter recipients to reply.
Note: If you wish the reply address to be the same as that of the sender, select the *Same as the sender* check box.
- 6 Type the default E-mail address of your test account.
- 7 Select the charset of the newsletter.
- 8 If you would like to use a copy of an existing newsletter, select the *Copy newsletter* button, otherwise, go to Step 9 on page 264.
If you select the *Copy newsletter* button, a dialogue box opens that allows you to browse your system for an existing newsletter (see Figure 292).

Figure 292 Searching and copying a newsletter



- a Choose the newsletter you would like to copy.
 - b Save the newsletter under a new name.
- 9 You have completed this procedure.

20.2 Creating and modifying mailing lists

The webEdition Newsletter Module allows you to create mailing lists in the following ways:

- use the E-mail data from your webEdition Customer Management Module

Note: This feature is available only if you have purchased and installed the Customer Management Module.

- use an existing CSV file
- create a mailing list manually
- import an existing address book (as a CSV file) from your current E-mail application (such as Microsoft Outlook, or Netscape Mail)

The sections that follow describe procedures that you can use to create mailing lists.

20.2.1 Creating a mailing list

Use the following procedure to define one or more mailing lists.

Procedure 35 Creating a mailing list***In the Newsletter Module main screen***

- 1 Click on the *Mailing list* tab to go to the *Mailing List* view (see Figure 293).

Figure 293 Mailing list view

- 2 To add a new name to the mailing list, go to the *Emails* area, and select the *add* button. *webEdition* opens the *Add email address* dialogue box (see Figure 294).

Figure 294 Add email address dialogue box

- 3 Type the E-mail address of the recipient of your newsletter in the *Emails* field.
- 4 Select the *Receive HTML email* checkbox if you want this person to receive your newsletter in HTML format.

- 5 Enter the salutation, title, first name and last name of your customer in the corresponding fields.
- 6 Click on the *Save* button.
- 7 Repeat the steps above to add more E-mail addresses to your mailing list.
- 8 You have completed this procedure.

20.2.2 Modifying the contents of a mailing list

Use this procedure to edit or delete E-mail addresses from your mailing list.

Procedure 36 Modifying the contents of a mailing list

In the Mailing list view

- 1 Go to the *Emails* area in the lower half of the *Mailing list* view (see Figure 293, "Mailing list view" on page 265).
- 2 In the *Emails* box, select the E-mail address that you wish to change.
- 3 Select the *Edit*, *Delete* or *Delete all* button, depending on which operation you wish to perform.
 - a If you select *Edit*, webEdition opens the *Edit email address* dialogue box (see Figure 295). Save the newsletter (and its associated mailing list) by clicking on the *Save* button at the bottom of the *Mailing list* view, then go to Step 4

Figure 295 *Edit email address* dialogue box



- b If you select *Delete* or *Delete all*, webEdition asks you to confirm your choice. Confirm or reject your choice.
- 4 You have completed this procedure.

20.2.3 Importing an existing E-mail address book

The webEdition software allows you to create a mailing list by importing an existing address book from your current E-mail application (such as Microsoft Outlook, or Netscape Mail). Use the following procedure to import your address book.

Note: The following procedure assumes that you have already used the export utility in your E-mail application to save your existing address book as a comma separated values (CSV) file. If you need assistance working with CSV files, consult the documentation provided with your E-mail software by its vendor.

Procedure 37 Importing an existing E-mail address book

In the Mailing list view

- 1 Go to the *Emails* area in the lower half of the *Mailing list* view (see Figure 293, "Mailing list view" on page 265).
- 2 Click the *Import* button.

After clicking the import button, webEdition opens additional fields below the Import button (see Figure 296).

Figure 296 Importing an existing E-mail address book

- 3 Click on the *Select* button to browse your files for the location of your CSV file.
- 4 In the *delimiter* dialogue box, type a comma "," to indicate that you wish to use comma separated values.
- 5 In the *email col.* dialogue box, type the column number in which the E-mail address appears in the CSV file.
- 6 In the *HTML col.* dialogue box select 0 for plain text E-mail or select 1 for HTML mail format.
- 7 In the *Salutation col.* dialogue box, type the column number in which the salutation appears in the CSV file.
- 8 In the *Title col.* dialogue box, type the column number in which the title appears in the CSV file.
- 9 In the *Firstname col.* dialogue box, type the column number in which the first name appears in the CSV file.
- 10 In the *Lastname col.* dialogue box, type the column number in which the last name appears in the CSV file.
- 11 Press the *OK* button.
webEdition imports the addresses into the E-mails field of your mailing list.
- 12 Alternatively, E-mail addresses can be imported from a file that is placed on your local disk. To upload a local file, click on the *Upload* button.
webEdition opens the upload CSV dialogue box (see Figure 297).

Figure 297 Uploading a CSV file from local disk

- 13 Click the *Browse* button to locate your file, then click *Upload*.
- 14 Click the *Save* button on the bottom of the *Mailing list* view.
- 15 You have completed this procedure.

20.2.4 Exporting an E-mail list

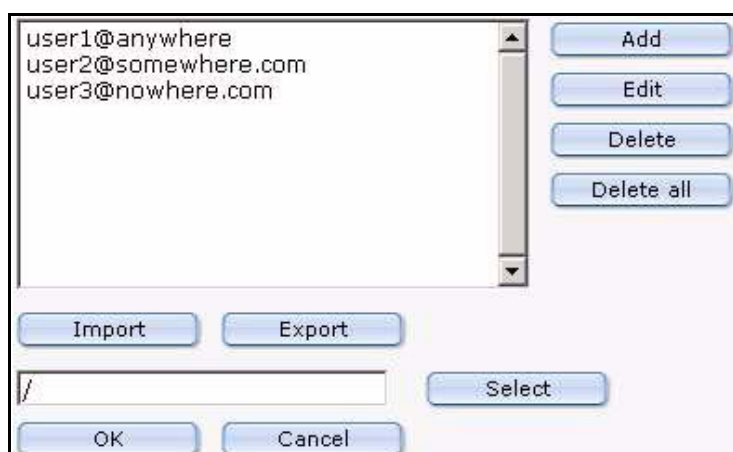
webEdition allows you to export a mailing list to your current E-mail application (such as Microsoft Outlook, or Netscape Mail). Use the following procedure to perform export your mailing list.

Note: Your mailing list will be saved as a comma separated values (CSV) file. If you need assistance working with CSV files, consult the documentation provided with your E-mail software by its vendor.

Procedure 38 Exporting an E-mail list

In the Mailing list view

- 1 Go to the *Emails* area in the lower half of the *Mailing list* view (see Figure 293, "Mailing list view" on page 265).
- 2 Select the *Export* button.
webEdition opens additional fields below the *Export* button (see Figure 298).

Figure 298 Exporting a CSV file

- 3 Click on the *Select* button to browse your files for a location for your CSV file.
- 4 Press the *OK* button.

webEdition exports the addresses to the specified location. Then *webEdition* opens a dialogue box with a link to the location of the CSV file.

Note: You can also save the CSV file on the local disk.

- 5 You have completed this procedure.

20.2.5 Creating a mailing list using the Customer Management Module

The following procedure allow you to take advantage of the webEdition Customer Management Module to produce easy-to-manage mailing lists.

If you have installed the Customer Management Module, the *Customers* area appears in the top portion of the *Mailing list* view (see Figure 299, "Defining a mailing list using the Customer Management Module" on page 269). This feature allows you to reuse the customer information and E-mail addresses that you have defined in the Customer Management Module.

Figure 299 Defining a mailing list using the Customer Management Module

The figure shows a web interface for defining a mailing list. It features a 'Customers' section with a 'Send to all' checkbox, a text input field, a 'Filter' checkbox, and 'Delete all' and 'Add' buttons.

Procedure 39 Creating a mailing list using the Customer Management Module

In the Customers area of the Mailing list view

- 1 Select the *Send to all* checkbox if you wish all the customers defined in your Customer Management Module to be added to your newsletter mailing list (see Figure 300).

Figure 300 Send newsletter to all customers

The figure shows a web interface for sending a newsletter to all customers. It features a 'Mailing list 1' section with a dropdown menu, a 'Customers' section with a 'Send to all' checkbox (checked) and a 'Filter' checkbox.

- 2 In the *Customers* area you can choose to send your newsletter to all your customers or filter the list. If you wish to filter the recipients, select the *Filter* checkbox.

webEdition opens the customers filter options (see Figure 301).

Figure 301 The Customers filter options

The figure shows a web interface for the Customers filter options. It features a 'Filter' checkbox (checked), a text input field with 'ID', a dropdown menu, an equals sign, another dropdown menu, and a text input field. There are also '+' and '-' buttons.

- 3 Define the parameters for your filter. There are three portions:
 - a a select box of variables (such as name, company, E-mail address, E-mail format) that have been used in the Customer Management Module database to describe your customer data.
 - b a search operator filter (such as "=", that is, "the same as").
 - c a text entry box.

- 4 If you wish to add more filters for your search, select the plus "+" button and choose *AND* or *OR* to define how this added filter reacts in relation to the former one.
- 5 Click on the save button.
- 6 You have completed this procedure.

20.2.6 Working with CSV files

Use the following procedure to create a recipients list from an existing CSV file.

Procedure 40 Working with CSV files

In the Mailing list view

- 1 Go the CSV Files area (see Figure 302).

Figure 302 CSV Files area



- 2 Establish a link to a CSV file by clicking the *add* button under the *CSV Files* field.
A window opens in which you can select a file from the server browser.
- 3 Click on the .cvs file that you wish to use as your receiver list from the list of files (see Figure 303).

Figure 303 Choosing a CSV file

File name	File type	Modified	File size
we_demo_2	Directory	11-02-2004 15:45:12	
we_demo	Directory	11-02-2004 15:45:12	
webEdition	Directory	12-02-2004 20:34:36	
cgi-bin	Directory	11-02-2004 15:45:12	
test.xml	XML file	11-02-2004 15:45:12	3.6 KB
localization_list.txt	Text page	11-02-2004 15:45:12	412 Byte
index.html	HTML page	11-02-2004 15:45:12	209 Byte
emails_export_10...4.csv	Binary document	13-02-2004 01:51:14	109 Byte

After clicking on the file, the name of the file appears in the Name field at the bottom of the search browser window .

- 4 Confirm your selection by clicking the *OK* button.
The window closes and the selected cvs file appears in your list of cvs files (see Figure 304).

Figure 304 List of selected CSV files



- 5 If you wish to modify your CSV file, you can perform the following operations, otherwise go to Step 6:
 - a If you click on the trash can icon, you remove the CSV file from your list.
 - b If you click on the pencil icon, a new window opens in which you can edit a CSV file (see Figure 305).

Figure 305 Modifying a CSV file

- c Beside each entry in your mailing list there are two icons, a pencil icon and a trash can icon.
 - i If you click on the trash can icon, you remove the address from your mailing list.
 - ii If you click on the pencil icon, you can edit an individual entry.

6 You have completed this procedure.

20.2.7 Creating multiple mailing lists

The webEdition Newsletter Module allows you to create and save multiple mailing lists. Use this procedure to create additional mailing lists.

Procedure 41 Creating multiple mailing lists

In the Mailing list view

- 1 Go to the *Emails* area in the lower half of the *Mailing list* view (see Figure 293, "Mailing list view" on page 265).
- 2 Select the plus "+" button on the bottom left side of the page.
A new Mailing list section appears.
- 3 To add addresses to your mailing list, see Procedure 35, "Creating a mailing list" on page 265.
- 4 You have completed this procedure.

20.2.8 Creating newsletter groups

The Newsletter Module allows you to create groups to organize your newsletters. These groups act as directories; they appear as folders in the explorer menu.

Procedure 42 Creating a newsletter group

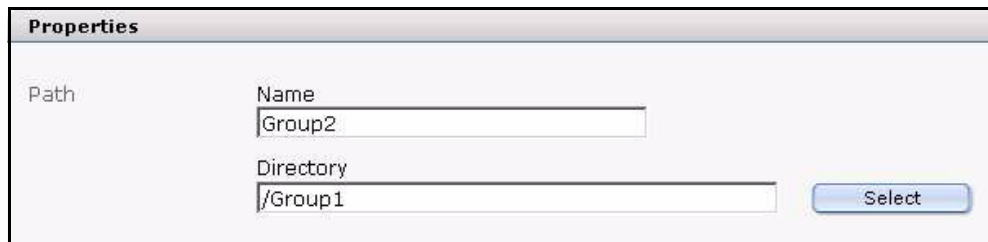
In the Newsletter Module main screen

- 1 Click *Newsletter > New > Group*.
The Properties view opens, in which you can create a new group.
- 2 Enter the name of your new group in the *Name* field.
- 3 Select a directory

- a If you wish to create a new directory at the root level "\", select **Save**.
- b If you have an existing group and you wish to create a sub group, click the **Select** button adjacent to the *Directory* field.

A screen opens from which you can select the appropriate group folder, as seen in Figure 306.

Figure 306 Creating a new newsletter group



The screenshot shows a 'Properties' dialog box with two input fields. The 'Name' field contains 'Group2' and the 'Directory' field contains '/Group1'. A 'Select' button is located to the right of the 'Directory' field.

- 4 Click **Save**.

The new group appears as a folder in the explorer menu. You can now create new newsletters for this group, or copy existing newsletters to it.

Figure 307 New group in the explorer menu



- 5 You have completed this procedure.

21 Newsletter layout: working with blocks

The webEdition Newsletter Module uses "blocks" to help you to "build" the layout of your newsletters. This chapter describes these building blocks and how to use them.

21.1 Newsletter block types

You build your newsletter in the *Edit* view of the Newsletter Module. To access the *Edit* view, click on the *Edit* tab on the main page. See Figure 308.

Figure 308 The new newsletter *Edit* view

In the *Block* area of the *Edit* view, you can choose from the following block types using the *Name* select box:

Figure 309 Block types

- Document-based
- Document field-based
- Object-based
- Object field-based

- File-based
- Text
- Attachment
- URL

You can use one or more blocks to create your newsletter. You can also use different block types—in any combination—to create sophisticated newsletters. Moreover, you can associate selected blocks of your newsletter with the mailing lists of your choice. By doing so, you can create one newsletter that has its content customized for specific readers.

The following sections describe procedures to help you use each type of building block.

21.2 Document-based block

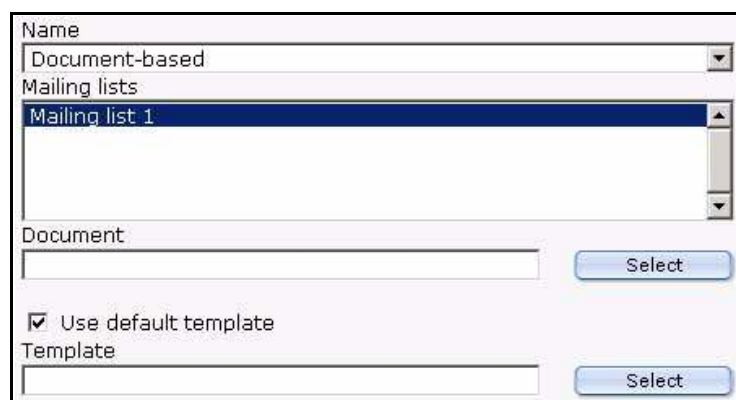
Use the following procedure to define the layout of your newsletter using an existing webEdition document and template.

Procedure 43 Document based block

In the Block section of the Newsletter Module Edit view

- 1 Select *Document based* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 310).

Figure 310 Document based block



- 2 In the *Mailing lists* field, select the mailing list that you wish to associate with the current block.
- 3 To choose the existing webEdition document you want to use, click on the *Select* button to browse your directories for the file.
- 4 Select the *Use default template* check box if you wish to apply the default template to the document. Otherwise, click on the *Select* (template) button to browse your directories for the template file.
- 5 To add more blocks to your newsletter, click on the plus "+" icon, and fill in the information associated with the block type.
- 6 Save the document by clicking on the *Save* button at the bottom of the page.
- 7 Preview your changes by clicking on the *Preview* button at the bottom of the page. (Close the *Preview* view).
- 8 Make further modifications to your newsletter (if required), then save the changes.

- 9 You have completed this procedure.

21.3 Document field-based block

Use the following procedure to define the layout of your newsletter using an existing webEdition document field.

Procedure 44 Document field-based block

In the Block section of the Newsletter Module Edit view

- 1 Select *Document field-based* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 311).

Figure 311 Document field-based block

The dialog box is titled 'Document field-based'. It contains the following elements:

- Name:** A dropdown menu with 'Document field-based' selected.
- Mailing lists:** A list box with 'Mailing list 1' selected.
- Document:** A text input field containing the path '/we_demo/newsletter/index.php' and a 'Select' button to the right.
- Document field:** A dropdown menu with 'text' selected.

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 To choose the existing webEdition document you want to use, click on the *Select* button to browse your directories for the file.
- 4 Select the *Document Field* that you wish to use.
- 5 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

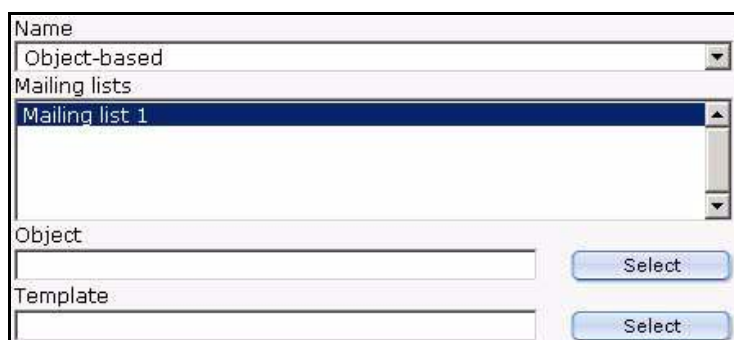
21.4 Object-based block

Use the following procedure to define the layout of your newsletter using a webEdition object.

Procedure 45 Object-based block

In the Block section of the Newsletter Module Edit view

- 1 Select *Object-based* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 312).

Figure 312 Object-based block

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 To choose the object you wish to use, click on the *Select* button to browse your directories for the location of the object.
- 4 Click on the *Select* (template) button to browse your directories for the template file you wish to use.
- 5 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

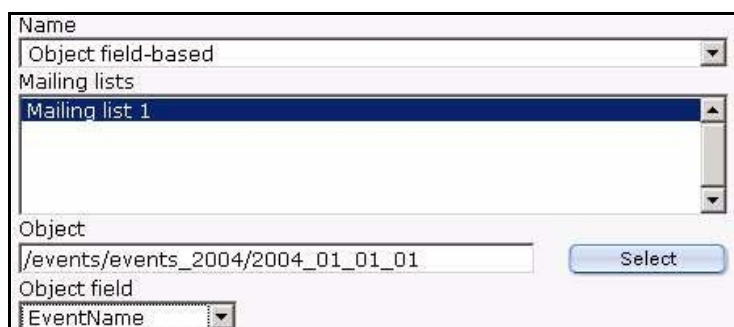
21.5 Object field-based block

Use the following procedure to define the layout of your newsletter using a webEdition object field.

Procedure 46 Object field-based block

In the Block section of the Newsletter Module Edit view

- 1 Select *Object field-based* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 313).

Figure 313 Object field-based block

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 To choose the object you want to use, click on the *Select* button to browse your directories for the location of the object.
- 4 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

21.6 File-based block

Use the following procedure to define the layout of your newsletter using a webEdition file.

Procedure 47 File-based block***In the Block section of the Newsletter Module Edit view***

- 1 Select *File-based* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 314).

Figure 314 File-based block

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 To choose the file you want to use, click on the *Select* button to browse your directories for the location of the file.
- 4 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

21.7 Text-based block

Use the following procedure to layout a newsletter using plain text or HTML.

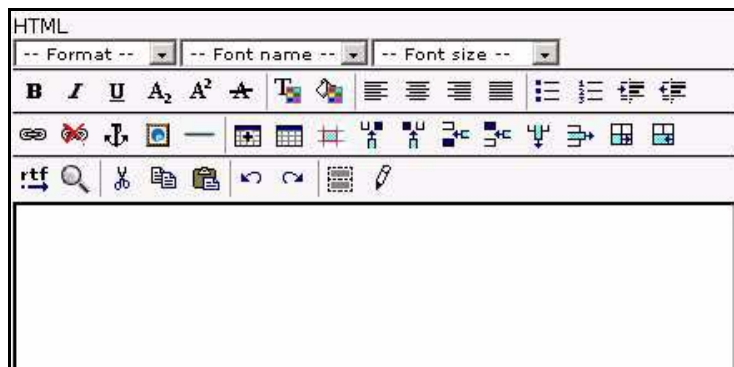
Procedure 48 Text-based block***In the Block section of the Newsletter Module Edit view***

- 1 Select *Text* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 315).

Figure 315 Text-based plain text block

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 Type the text of your newsletter in the *Plain text* box.
- 4 Type the text of your newsletter in the *HTML* box.

Figure 316 Text-based HTML block



- 5 Add a CSS style and HTML formatting to your page.
- 6 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

21.8 Attachment block

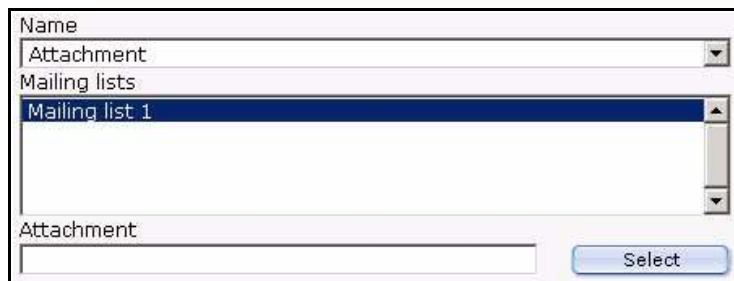
Use the following procedure to add an attachment to your newsletter.

Procedure 49 Attachment block

In the Block section of the Newsletter Module Edit view

- 1 Select *Attachment* from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 317).

Figure 317 Attachment block



- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 Select the attachment you wish to add to your newsletter.
- 4 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

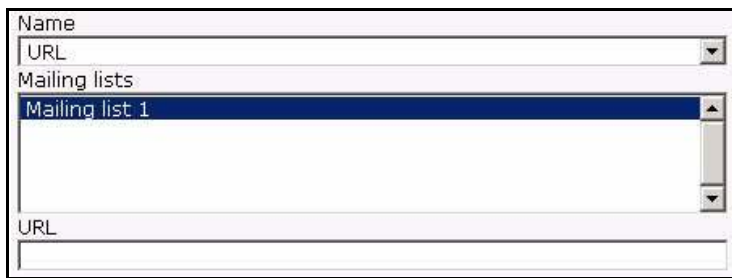
21.9 URL block

Use the following procedure to add an existing web page to your newsletter.

Procedure 50 URL block

In the Block section of the Newsletter Module Edit view

- 1 Select URL from the *Block Name* select box.
webEdition displays the following dialogue box (see Figure 318).

Figure 318 URL blockThe image shows a configuration window for a 'URL' block. It has a title bar 'Name' and a dropdown menu currently set to 'URL'. Below this is a section titled 'Mailing lists' containing a list box with 'Mailing list 1' selected. At the bottom, there is a text field labeled 'URL'.

- 2 In the *Mailing lists* dialogue box, select the mailing list that you wish to associate with the current block.
- 3 Enter the URL of the page you wish to add to your newsletter.
- 4 Complete the procedure using Step 5 on page 274 through Step 9 on page 275 of Procedure 43, "Document based block".

22 Testing, saving and sending a newsletter

The following sections describe routine diagnostic tests that you can perform before sending your newsletter. It also describes how to save and how to send your newsletter to your designated audience.

22.1 Using diagnostic tools

The webEdition Newsletter Module includes a suite of diagnostic tools. You can use these tools to verify your newsletter campaign, that is, to test your newsletter and your receiver lists before actually sending your newsletter. You can perform the following tasks:

- test your E-mail lists
- test the sending process
- preview the contents of your mailing lists
- view log reports

You can access these tools from the *Options* drop-down menu on the Newsletter Module main page (see Figure 319).

Figure 319 Diagnostic tools in the *Options* drop-down menu

Options	Help
Domain check...	
Lists overview...	
Show logbook...	
Test...	
Preview...	
Send test E-mail	
Search E-mail...	
Edit CSV file...	
Black list...	
Clear logbook...	
Settings...	

The procedures in the following sections describe how to test your mailing lists and the sending process.

22.1.1 Testing your mailing lists

Use this procedure to examine the contents of a mailing list, and to verify the validity of the addresses in it.

Procedure 51 Testing your mailing lists

On the Newsletter Module main screen

- 1 Click on *Options > Lists overview*.

webEdition opens the Lists overview screen, showing you a list of the mailing lists that you have created, and the mailing addresses recorded in those lists (see Figure 320).

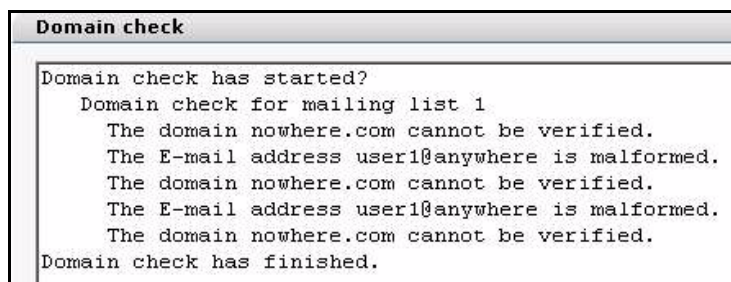
Figure 320 Testing your E-mail lists: Lists overview screen



- 2 Perform a check on the domain names associated with your E-mail lists, by clicking on the *Options* drop-down menu and selecting *Domain check*.

webEdition opens the Domain check log (see Figure 321).

Figure 321 Testing your E-mail lists: Domain check



The domain check log reports any domain names found in your mailing list that are not registered on your domain name server (DNS). Such an address is likely erroneous.

- 3 If an error appears in the domain check log, verify the address and edit your mailing list accordingly. To edit an address in your mailing list, see Section 20.2.2, "Modifying the contents of a mailing list" on page 266.
- 4 You have completed the verification process for your mailing list.

22.1.2 Testing the build process

The webEdition Newsletter Module can also test the newsletter building process itself. You can run a diagnostic routine in which the Newsletter Module will build your newsletter together with its associated E-mail list(s) to verify that all the processes are complete.

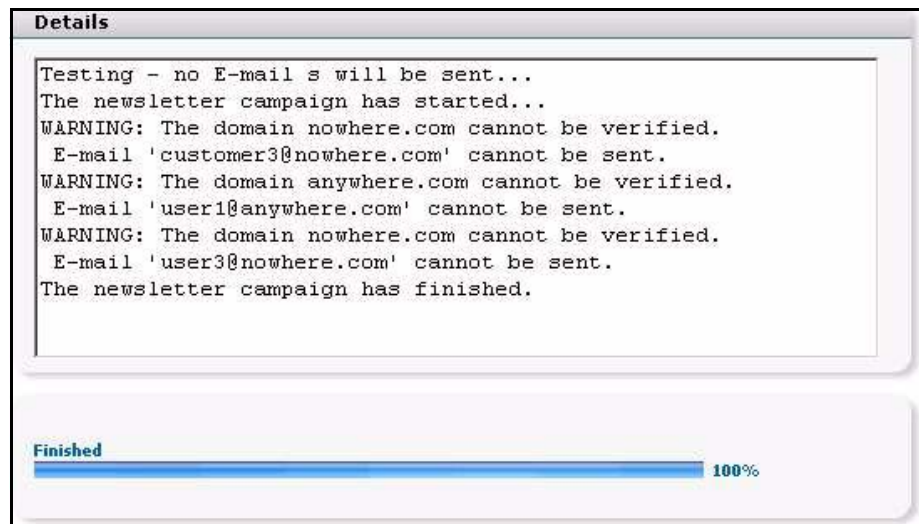
Procedure 52 Testing the building process

In the Newsletter Module main screen

- 1 Select *Options > Test...*

webEdition asks you if you wish to proceed. If you click OK, the system opens the Details log showing the results of the test (see Figure 322 and Section 22.1.2, "Testing the build process" on page 282).

Figure 322 Testing the building process



The Details screen reports that no E-mail will actually be sent during this test. It lists any E-mail addresses that cannot be verified by a DNS server, and also those whose syntax is malformed. Note also that the status bar on the bottom of the screen shows the progress of the process.

- 2 You have completed the verification of the sending process.

22.1.3 Previewing a newsletter and sending a test E-mail

Before actually sending out your newsletter, you must preview its layout and ensure that your recipients will receive the newsletter in its intended format.

The following procedure describes how to preview your newsletter—to view how your newsletter will look when you send it—and how to test that it will be received in its proper format.

Procedure 53 Previewing a newsletter and sending a test E-mail

In the Newsletter Module main screen

- 1 Click *Options > Preview*.

You will see the layout and the structure of the Newsletter in the same form as your recipients will see it. If the layout is correct, close the Preview area.

Figure 323 Example of a newsletter in *Preview* mode

2 Adjust the layout (if necessary).

If	Do
the layout is correct	close the <i>Preview</i> screen and go to Step 3.
the layout is not correct	go to the appropriate procedure in Chapter 21, "Newsletter layout: working with blocks" on page 273, then return to this procedure.

Note: If you have used an HTML formatted newsletter, make sure that you have selected the HTML checkbox at the bottom of the *Edit* view when previewing your newsletter.

- 3 To verify that the newsletter will be received by your recipients, you can send a test newsletter to the test E-mail address that you have defined in your initial settings. The E-mail will be sent in either HTML or plain text format, according to what you have selected from the HTML checkbox at the bottom of the *Edit* view.
 - a Activate the checkbox to send the test E-mail in HTML format.
 - b Do not activate the checkbox to send the test E-mail in text format.
- 4 To send a test newsletter, in the Newsletter main menu, click on *Options > Send test E-mail*. *This action will send a newsletter only to your test E-mail account.*

- 5 Open the E-mail from your test account to verify the layout of the newsletter.

If	Do
the layout is correct	close the E-mail and go to step Step 6.
the layout is not correct	go to Chapter 21, "Newsletter layout: working with blocks" on page 273, then return to this procedure.

- 6 You have completed this procedure.

22.1.4 Viewing a log report

webEdition allows you to view a log report that captures the processes behind your newsletter campaign.

Procedure 54 Viewing a log report

In the Newsletter Module main screen

- 1 Select *Options > Show logbook*.

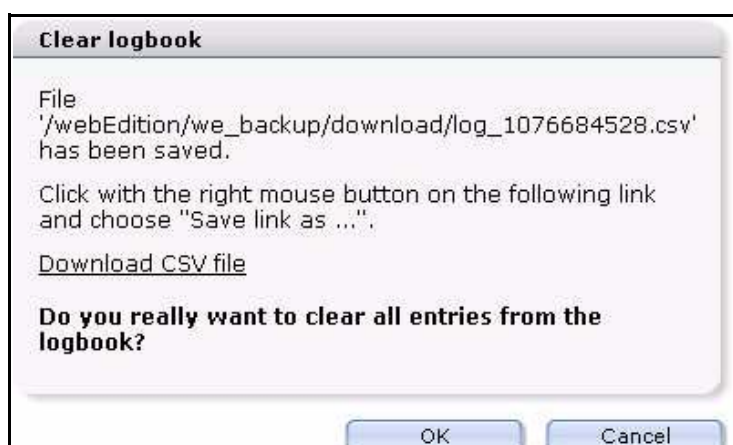
The following screen appears (see Figure 324):

Figure 324 Viewing a log report



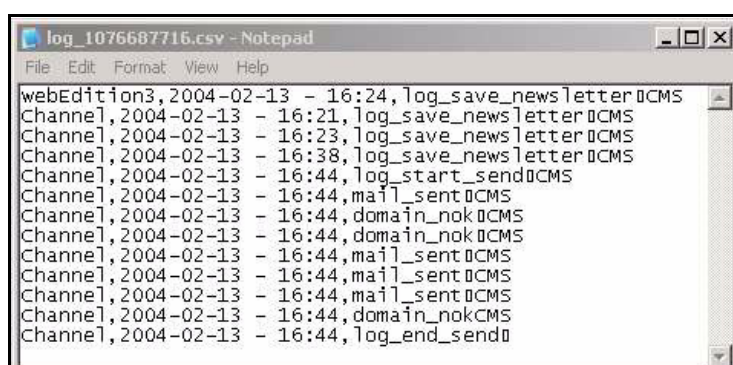
The log shows all of the operations associated with the newsletter campaign.

- 2 Once you have viewed the data, click the *Close* button at the bottom of the *Show logbook* screen.
- 3 If you wish to empty the log, click *Options > Clear logbook*, otherwise, go to Step 7.
The Clear logbook dialogue box opens.

Figure 325 *Clear logbook* dialogue box

- 4 If you wish to save a record of the log, right-click on the *Download CSV file* link and save the link (the csv file) in a directory of your choice.

After saving the csv file, you are returned to the Clear logbook dialogue box. Thereafter, you can open the csv file in a text editor as seen in Figure 326.

Figure 326 Logbook saved as a csv file

- 5 If you wish to clear the logbook, click OK.
The system opens an information box, telling you that the logbook has been cleared.
- 6 Click OK.
- 7 You have completed this procedure.

22.1.5 Saving and sending your newsletter

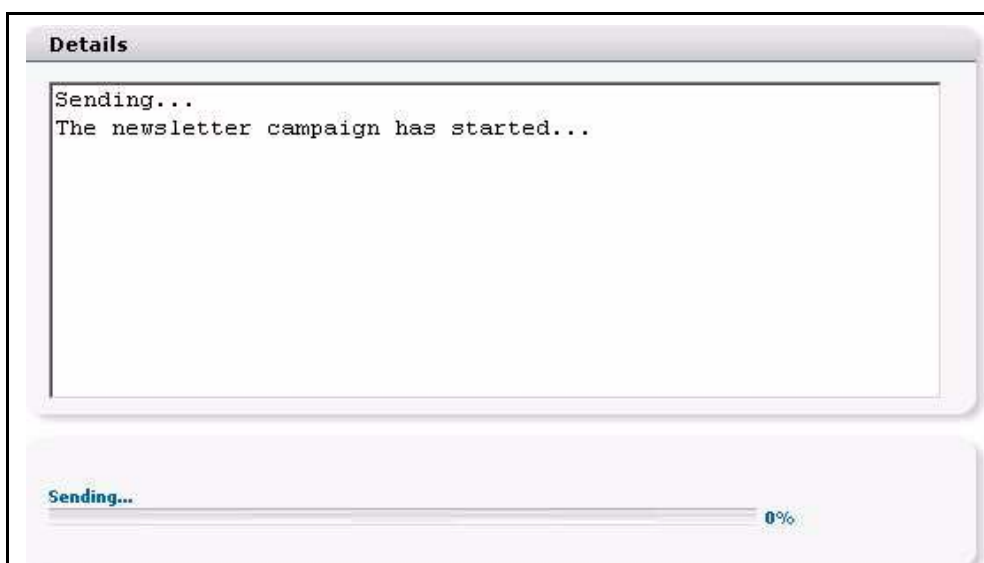
After running your diagnostic routines, you must re-save your work before you send your newsletter. Use the following procedure to save your newsletter and to send it to the addresses in your designated mailing lists.

Procedure 55 Saving and sending your newsletter

In the Properties view

- 1 Select the *Save* button on the bottom of the page.
- 2 Select the *Send* button.

A window opens showing the details and progress of your mailing campaign (see Figure 327).

Figure 327 Sending a newsletter: *Details* window

- 3 Monitor the progress of the campaign by watching the progress meter at the bottom of the page.

**CAUTION****Risk of termination of campaign**

You must leave the *Details* window open until the campaign is finished.

If you close the window, the mailing campaign will be terminated!

- 4 When the system reports that the campaign has finished, close the *Details* window.
- 5 You have completed this procedure.

22.1.6 Barring E-mail addresses using a *Black list*

webEdition allows you to create a list of E-mail addresses that will never receive a newsletter. Such a list is referred to in webEdition as a *Black list*.

Procedure 56 Creating a Black list

In the Newsletter main screen

- 1 Click *Options > Black list...*
The *Black list* screen appears (see Figure 328).

Figure 328 The *Black list* screen

- 2 To add an E-mail address to the *Black list*, click the *Add* button
The following additional operations are available:
 - a Select the *Edit*, *Delete* or *Delete all* button, depending on which operation you wish to perform.
 - b An E-mail address can be imported from a csv file or exported to the csv file. To import a csv file, press the *Import* button. To export a local file, press the *Export* button.
- 3 Save the *Black list* by clicking on the *Save* button at the bottom of the page.
- 4 You have completed this procedure.

22.1.7 Searching E-mails

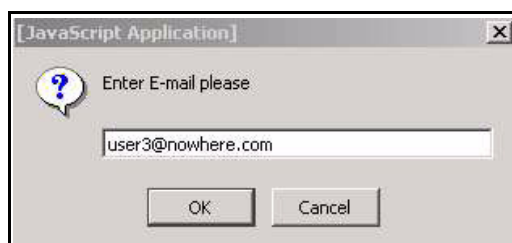
webEdition allows you to search through the mailing lists for specified E-mail addresses. This feature is helpful if you have a long mailing list, and you need to modify an E-mail entry.

Procedure 57 Searching for an E-mail address

In the Newsletter main menu

- 1 To access the search function, open the newsletter that you wish to search, and click on the *Options > Search Email...*

The input box appears where an E-mail address can be entered (see Figure 329).

Figure 329 Search E-mails

- 2 Enter an E-mail address.
- 3 Click *OK*.

If the system finds a corresponding E-mail address, a screen appears in which you are notified, and the address will be highlighted in the mailing list (see Figure 330).

Figure 330 Search results

4 You have completed this procedure.

23 Designing newsletter templates

This chapter treats items such as how to design newsletter templates, and how to use the Newsletter Module's features and we:tags.

23.1 How do I design a template which I can use for the salutation block for my newsletters?

To add a personal salutation to your newsletter, you must design a template using we:tags, and from this template, you must generate a page. This template contains special Newsletter we:tags to differentiate male, female and gender neutral salutations. Using the editor view, you then select the generated page as the first block in the Newsletter. For example:

```
<we:ifHtmlMail>
  <we:ifFemale>
    Dear Mrs.<we:newsletterSalutation type="title"/>
    <we:newsletterSalutation type="lastname" />,<br><br>
  <we:else/>
    <we:ifMale>
      Dear Mr.<we:newsletterSalutation type="title"/>
      <we:newsletterSalutation type="lastname"/>,<br><br>
    <we:else/>
      <we:ifTitleAndLastName>
        Dear <we:newsletterSalutation type="title"/>
        <we:newsletterSalutation type="lastname"/>,<br><br>
      <we:else/>
        Dear customer,<br><br>
      </we:ifTitleAndLastName>
    </we:ifMale>
  </we:ifFemale>
<we:else/>
  <we:ifFemale>
    Dear Mrs.<we:newsletterSalutation type="title"/>
    <we:newsletterSalutation type="lastname"/>,<br>
  <we:else/>
    <we:ifMale>
      Dear Mr.<we:newsletterSalutation type="title"/>
      <we:newsletterSalutation type="lastname"/>,<br>
    <we:else/>
      <we:ifTitleAndLastName>
        Dear <we:newsletterSalutation type="title"/>
        <we:newsletterSalutation type="lastname"/>,<br><br>
      <we:else/>
        Dear customer,
      </we:ifTitleAndLastName>
    </we:ifMale>
  </we:ifFemale>
</we:ifHtmlMail>
```

23.2 How do I define an "unsubscribe link" so that people can remove themselves from a mailing list?

In order to place a link directly in a newsletter (as a concluding block, for example) in which one must only click to cancel registration, you use the `<we:newsletterUnsubscribeLink>` tag. This tag produces a link which points to a webEdition document whose ID is set as the value of the attribute "id". At the same time, the E-mail address to be deleted will be passed on with the URL. The `<we:addDelNewsletterEmail>` tag must appear in the webEdition document. For example:

```
<we:ifHtmlMail>
  To unsubscribe from this newsletter click:
  <a href="<we:newsletterUnsubscribeLink id="310"/>">here</a>
<we:else>
  To unsubscribe from this newsletter click the following link:
  <we:newsletterUnsubscribeLink id="310"/>
</we:ifHtmlMail>
```

23.3 How do I make a "subscribe page" so people can enroll themselves in a newsletter list?

You require a field where one can register an E-mail address, as well as a send button. A `<we:form>` tag is used and linked with the attribute "id" to the subsequent page such as `<we:form id="99">` or `<we:form id="self">`.

Within the form, an entry field for the E-mail address is represented with the `<we:subscribe>` tag. It is followed by a submit button that sends the form. For example:

```
<we:form id="self">
  E-Mail: <we:subscribe type="email"/>
  <input type="submit" value="subscribe"/>
</we:form>
```

On the template of the page to which the form is sent, you must have the tag `<we:addDelNewsletterEmail>` so that the input in the `<we:subscribe>` field can be stored. If you offer more than one newsletter, you must ensure that the order of the mailing lists which you gave as a value in the attribute *path* has the same order as the webEdition document in which the party interested in the newsletter had registered.

```
<we:addDelNewsletterEmail path="newsletter.txt">
```

If you have more than one mailing list and you would like to enable the visitor of a Web site to choose which of the lists he/she wishes to join, you can give the visitor a choice by using the `<we:subscribe type="listCheckbox">` tag or the `<we:subscribe type="listSelect">` tag.

The following example uses the `<we:subscribe type="listCheckbox">` tag.

Note: The order of the newsletters must be the same as what was given as a value in the attribute "path" of the `<we:addDelNewsletterEmail>` tag. For example:

```
<we:form id="self">
  <we:subscribe type="listCheckbox"/>Sports<br>
  <we:subscribe type="listCheckbox"/>Politics<br>
  <we:subscribe type="listCheckbox"/>Computer<br>
  E-Mail: <we:subscribe type="email"/>
  <input type="submit" name="Submit" value="send">
</we:form>
```

The following example uses the `<we:subscribe type="listSelect">` tag.

Note: The order of the newsletters must be the same as what was given as a value in the attribute "path" of the `<we:addDelNewsletterEmail>` tag.

```
<we:form id="self">
  <we:subscribe type="listSelect"
values="Sports,Politics,Computer"/>
  <br>E-Mail: <we:subscribe type="email"/>
  <input type="submit" name="Submit" value="send">
</we:form>
```

Although you can send out a personalized newsletter with only a salutation and a title, it is advisable to insert a salutation, title, first name, and last name field into the template.

```
<we:form id="self" method="post">
  E-Mail-Address:<br>
  <we:subscribe type="email" size="40"/><br>
  Salutation:<br>
  <we:subscribe type="salutation" values="Mr.,Mrs."/><br>
  Title:<br>
  <we:subscribe type="title" values="Dr.,Prof."/><br>
  Firstname:<br>
  <we:subscribe size="40" type="firstname"/><br>
  Lastname:<br>
  <we:subscribe size="40" type="lastname"/><br>
  Mailinglist:<br>
  <we:subscribe type="listSelect"
values="Sports,Politics,Computer"/>
  <br><br>
  <input type="submit" name="Submit" value="send">
</we:form>
```

The following code example shows how you can offer to your subscribers the possibility of choosing whether he/she wants to receive the newsletter in HTML or text format. You can use either a drop-down menu or a checkbox.

Select box:

```
Format:<br>
<we:subscribe type="htmlSelect" values="Text-EMail,HTML-EMail"
value="1"/><br>
```

Checkbox:

```
Format:<br>
<we:subscribe type="htmlCheckbox"/>&nbsp;&nbsp;&nbsp;HTML-Mail
```

23.4 How do I differentiate between single and double opt-in?

The formula is the same whether you wish to create a single opt-in or a double opt-in process. The difference consists in the `<we:addDelNewsletterEmail>` tag. If the value of the attribute *doubleoptin* is "true" in this tag, the enrollment will be stored temporarily, and an E-mail will be sent to the designated address. In the attribute *mailid*, you must provide the ID of a webEdition document which contains the mail text. This must be a webEdition document that is based on a template in which you have used we:tags to represent the salutation and the confirmation links. Using the attribute *from* you can set a value for the E-mail address of the sender; and by using the attribute *subject* you can enter a value for the subject of the E-mail. The attribute *expiredoubleoptin* controls how many minutes an entry will remain in the temporary table before it is deleted. If no value is entered, the entry will be deleted in 1440 minutes

(24 hours). This means that the recipient of the newsletter must confirm their enrollment within this time period; if the recipient does not confirm in time, he/she must enroll again. The ID of the page associated with the confirmation link is set using the attribute ID of the `<we:addDelNewsletterEmail>` tag. The `<we:addDelNewsletterEmail>` tag must appear again on the template for this page. If you omit the attribute, it will be linked to the subscribe form on the same page.

If you have more than one mailing list, you must ensure that the order of the mailing lists which you gave as a value in the attribute *path* has the same order as the webEdition document in which the party interested in the newsletter had registered.

```
<we:addDelNewsletterEmail
path="we_demo/newsletter/sport.txt,we_demo/newsletter/politics.txt
,we_demo/
newsletter/computer.txt" doubleoptin="false" mailid="488"
subject="Register
for CMS Newsletter"
from="newsletter@mydomain.com"/>
```

You can check whether a subscription or cancellation has functioned by placing various `<we:if>` tags after the `<we:addDelNewsletterEmail>`-tag.

```
<script language="JavaScript">
<!--
var msg = "";
<we:ifSubscribe>
  <we:ifDoubleOptIn>
    msg = 'An email was sent to <we:var type="global"
name="WE_NEWSLETTER_EMAIL">. To confirm your enrollment in our
newsletter,
you must click on the confirmation link included in that email.';
  <we:else/>
    msg = 'The E-Mail <we:var type="global"
name="WE_NEWSLETTER_EMAIL">
was successfully entered!';
  </we:ifDoubleOptIn>
</we:ifSubscribe>
<we:ifNotSubscribe>
  <we:ifMailingListEmpty>
    msg = 'Please select at least one of the mailing lists!';
  <we:else/>
    <we:ifEmailExists>
      msg = 'This email address is already entered in our mailing
list!';
    <we:else/>
      <we:ifEmailInvalid>
        msg = 'The email address ist not valid!';
      <we:else/>
        msg = 'Attention: there is an error in the format of the email
address <we:var type="global" name="WE_NEWSLETTER_EMAIL">! Please
use the
format mailaddress@mydomain.com!';
      </we:ifEmailInvalid>
    </we:ifEmailExists>
  </we:ifMailingListEmpty>
</we:ifNotSubscribe >
if(msg)
  alert(msg);
//-->
</script>
```

23.5 How do I design a template which I can use to confirm enrollment for my newsletter?

You can perform this function with coding similar to the salutation block noted above, except that the confirmation link must appear after the dispatched E-mail. To create the confirmation function, you use the `<we:newsletterConfirmLink>` tag. For example:

```
<we:ifHtmlMail>
  <we:ifFemale>
    Dear Mrs.<we:newsletterSalutation type="title"/>
  <we:newsletterSalutation type="lastname"/>,<br><br>
  <we:else/>
    <we:ifMale>
      Dear Mr.<we:newsletterSalutation type="title"/>
    <we:newsletterSalutation type="lastname" />,<br><br>
    <we:else/>
      Dear customer,<br><br>
    </we:ifMale>
  </we:ifFemale>
  Please confirm your request for our newsletter by clicking on the
  following link:
  <we:newsletterConfirmLink/><br><br>
  Many thanks from your CMS Team!
  <we:else/>
    <we:ifFemale>
      Dear Mrs.<we:newsletterSalutation type="title"/>
    <we:newsletterSalutation type="lastname"/>,<br>
    <we:else/>
      <we:ifMale>
        Dear Mr.<we:newsletterSalutation type="title"/>
      <we:newsletterSalutation type="lastname"/>,<br>
      <we:else/>
        Dear customer,<br>
      </we:ifMale>
    </we:ifFemale>
    Please confirm your request for our newsletter by clicking on the
    following link: <we:newsletterConfirmLink/><br><br>
    Many thanks from your CMS Team!
  </we:ifHtmlMail>
```

23.6 How do I design an unsubscribe page so people can remove themselves from a mailing list?

If you have used the easiest method for the subscribe page, that is, with

only one field to enter an E-mail address, you will require only one button. To create an unsubscribe button, use an `<we:unsubscribe>` tag, followed by an HTML submit button. For example:

```
<we:form id="self">
  E-Mail-Adresse:<br>
  <we:unsubscribe size="40"/><br>
  <input type="submit" name="Submit" value="send">
</we:form>
```

By using a single entry after the `<we:addDelNewsletterEmail>` tag, you can test whether or not the unsubscribe was successful, and if necessary, generate an error message. For example:

```
<script language="JavaScript">
<!--
  <we:ifUnsubscribe>
    msg = 'The E-Mail address <we:var type="global"
    name="WE_NEWSLETTER_EMAIL"> was successfully removed!';
  </we:ifUnsubscribe>
```

```
<we:ifNotUnsubscribe>
  <we:ifEmailNotExists>
    msg = 'The E-Mail address <we:var type="global"
name="WE_NEWSLETTER_EMAIL"> does not exist in our list and therefore
cannot
be removed!';
  <we:else/>
    <we:ifMailingListEmpty>
      msg = 'Please select at least one mailing list!';
    <we:else/>
      <we:ifEmailInvalid>
        msg = 'That email address is not valid!';
      <we:else/>
        msg = 'Attention: there is an error in the format of the
email
address <we:var type="global" name="WE_NEWSLETTER_EMAIL">! Please
use the
format mailaddress@mydomain.com!';
      </we:ifEmailInvalid>
    </we:ifMailingListEmpty>
  </we:ifEmailNotExists>
</we:ifNotUnsubscribe>
if(msg)
  alert(msg);
//-->
</script>
```

24 Scheduler: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Scheduler and Scheduler PRO Modules. This chapter treats what the modules do and how to install them. You can also find information here about the basic layout and command features for these modules. These topics are treated in the following sections:

- Section 24.1, "What are the webEdition Scheduler modules?" on page 297
- Section 24.2, "Installation" on page 298
- Section 24.3, "Scheduler Module: general information and navigation" on page 298

24.1 What are the webEdition Scheduler modules?

The webEdition suite offers three types of scheduling capabilities depending on the modules you have purchased: the basic scheduler, the Scheduler Module and the Scheduler PRO Module.

24.1.1 The basic scheduler

The basic version of webEdition allows you to decide whether to publish your files online either immediately or at a later date.

24.1.2 The Scheduler Module

The webEdition Scheduler Module is designed to help you to keep your Web site up to date by offering you enhanced capabilities for scheduling the publication and removal of material on your Web page.

24.1.3 The Scheduler PRO Module

The Scheduler PRO Module gives you complete control over the automated publication process.

The webEdition Scheduler PRO Module offers more flexibility than the Scheduler Module in helping users to determine exactly what types of automated tasks are to occur to your web site content (such as publishing and un-publishing a document, moving a document to a new directory, and deleting a document). It also offers a user-friendly interface allowing you to schedule individual tasks on a singular, hourly, daily, weekly, monthly or yearly basis.

24.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

24.3 Scheduler Module: general information and navigation

After installing the Scheduler Module, you will find the options for scheduling documents in the *Properties* view of the *Documents* main screen. The task you are scheduling is always associated with a document, therefore you must first open a document in webEdition.

You can create your files in the usual fashion. However, in addition to the normal webEdition options (such as *Path*, *Copy*, *Document*, *Categories* and *Owners*), you will also see an area called *Automatic publishing* in the *Properties* view (see Figure 331).

Figure 331 The location of the Scheduler in the *Properties* view

The screenshot shows the 'Properties' view of a document in webEdition. The browser address bar indicates the page is `/we_demo/news/news_webEdition_version3.php`. The interface includes a sidebar with navigation links: Documents, Templates, Objects, and Classes. The main content area is titled 'Properties' and contains several sections:

- Path:** `/we_demo/news/news_webEdition_version3.php`
- Document:**
 - Document type:** A dropdown menu currently showing `--none--`, with an 'Edit' button to its right.
 - Template:** `/we_demo/news/news_article_version3.tpl`, with a 'Select' button to its right.
 - ☒ **Generate dynamic page** ☒ **Is searchable?**
- Meta tags:**
 - Title:** `webEdition Version 3`
 - Description:** `webEdition Software GmbH version 3`
 - Keywords:** `version 3`
 - Character coding:** `No we:charset-tag in template` (dropdown menu showing `--none--`)
- Less properties:** A button to collapse the view.
- Automatic publishing:**
 - ☐ **From:** `06/02/2004`
 - ☐ **To:** `06/02/2004`

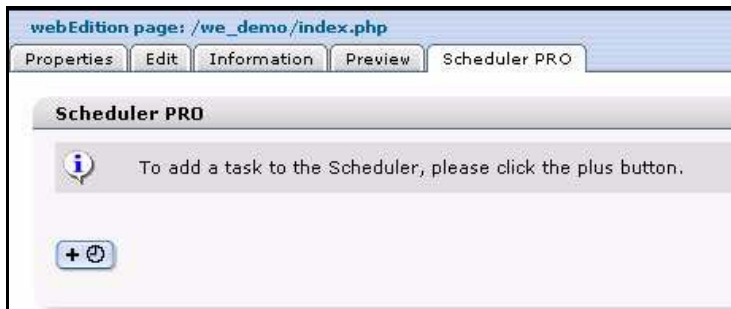
The *Automatic publishing* option allows you to determine when and for how long the document should be published.

For details on how to schedule a task using the Scheduler Module, see Chapter 25, "Using the Scheduler Module for automatic publishing" on page 303.

24.4 Scheduler PRO: general information and navigation

After installing the Scheduler PRO Module, you will see a new tab called *Scheduler PRO* in the *Documents* main screen. The task you are scheduling is always associated with a document, therefore you must first open a document in webEdition. To access the Scheduler PRO Module, click the (vertically-aligned) *Documents* tab, then click on a document of your choice in the explorer menu (see Figure 332):

Figure 332 *Documents* main screen showing the *Scheduler PRO* tab

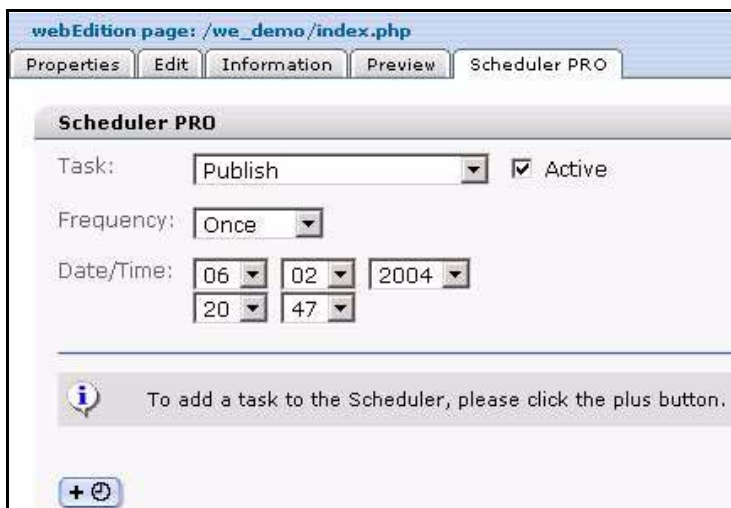


24.4.1 Scheduler PRO view

The Scheduler PRO Module gives you complete control over when to publish your documents. Each document that you wish to schedule is defined as a task in the scheduler. To open the Scheduler PRO view, choose a document, and click on the Scheduler PRO tab. Click on the + icon to open the Scheduler PRO view and to add a task to the scheduler (see Figure 333).

Note: You can add more tasks to the scheduler by clicking on the + icon.

Figure 333 Scheduler PRO view



The Scheduler PRO offers three command parameters:

- *Task*
- *Frequency*
- *Date/Time*

24.4.1.1 Task commands

In the *Task* select box you can choose the type of operation you wish to perform (see Figure 334, "Task operation select box" on page 300).

Figure 334 Task operation select box



The *Task* select box offers you the following options:

- *Publish*
- *Unpublish*
- *Delete*
- *Change document type*
- *Change categories*
- *Change directory*

Activate the *Active* checkbox to instruct the module to follow through with the scheduled task. If you do not activate the checkbox the scheduled task will not be executed.

24.4.1.2 Frequency commands

The *Frequency* select box allows you to choose the time interval between scheduled tasks (see Figure 335).

Figure 335 The Frequency select box



The *Frequency* select box has the following options:

- *Once*
- *Hourly*
- *Daily*
- *Weekly*
- *Monthly*
- *Yearly*

24.4.1.3 *Date/Time* commands

The *Date/Time* select boxes allow you to set the time for the execution of the scheduled task.

For details on how to schedule a task using the Scheduler PRO Module, see Chapter 26, "Using the Scheduler PRO Module" on page 305.

24.5 Date and time considerations

The Scheduler and Scheduler PRO Modules operate in accordance with the date and time settings on your Web server.

24.6 Summary page requirement

The scheduling functions that you use in the Scheduler and Scheduler PRO Modules operate in conjunction with summary pages, that is, when the `<we:listview>` tag is used.

Because many service providers do not allow the use of scheduling (such as *cron jobs* on UNIX systems, or *schedule tasks* on Windows systems), there must be a trigger for the scheduler so that it can publish and unpublish a document. The trigger for the webEdition scheduler is in the `<we:listview>` tag. Whenever a visitor opens a page with the listview, the scheduler checks the server for scheduled tasks, then it publishes and displays an updated listview. Thereafter, the visitor can access any new items by clicking on the appropriate link in the listview.

25 Using the Scheduler Module for automatic publishing

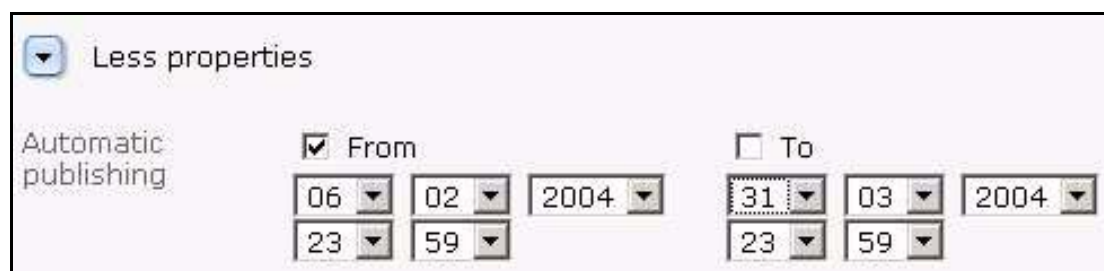
This chapter describes how to use the automatic publishing feature in the Scheduler Module.

25.1 Publishing your document

To specify when a document should first be published, activate the *From* checkbox. The default system response is the current time on the Web server.

When you activate the automatic publishing feature, webEdition responds by suggesting that the document be published at the current time. You can modify the suggestion using the select boxes to change the date and the time before saving your entries (see Figure 336). The document will appear on your Web page at the time and date you have specified.

Figure 336 Entering the start date/time



The screenshot shows a web interface for the Scheduler Module. At the top left, there is a button labeled 'Less properties'. Below it, the text 'Automatic publishing' is displayed. To the right of this text are two sets of controls. The first set, labeled 'From', has a checked checkbox and three dropdown menus for time (06, 02, 23) and date (02, 23, 2004). The second set, labeled 'To', has an unchecked checkbox and three dropdown menus for time (31, 03, 23) and date (03, 23, 2004).

25.2 Taking a document off-line

To specify when your document should be taken off-line, activate the *To* checkbox and use the select boxes to set the desired date and time. webEdition will suggest the current time on the web server. Save your entries. The document will no longer be accessible on-line after the time specified, nor will it be displayed (see Figure 337).

Figure 337 Scheduling to take a document off-line

Automatic publishing

☒ From

☒ To

If you do not activate the *To* checkbox, the document will be displayed on-line until you take it off-line manually.

25.3 Publishing automatically vs. publishing normally

The Scheduler Module works only if you activate the *Publish after saving* checkbox when saving your document (see Figure 338).

If you have scheduled a task and selected the *Publish after saving* checkbox, the document will not be published immediately, but rather at the scheduled time.

Figure 338 Saving and publishing a scheduled task

Automatic publishing

☒ From

☒ To

Categories

☒ Publish after saving ☐ New page after saving

26 Using the Scheduler PRO Module

This chapter describes how to use the Scheduler PRO Module. This module allows you to schedule several kinds of tasks including publishing, unpublishing, deleting, and changing the document type, category and directory of a webEdition document.

26.1 Selecting a task

The task you are scheduling is always associated with a document, therefore you must first open a document in webEdition, and then click the *Scheduler PRO* tab.

In the *Scheduler PRO* view, choose a task by selecting one of the following options from the *Task* select box:

- *Publish*. Use this item to schedule the publication of a document.
- *Unpublish*. Use this item to remove a page from the view of your Web page visitors.
- *Delete*. Use this item to delete a document at a specified time.
- *Change document type*. Use this item to change the document type.
- *Change categories*. Use this item to change the document category.
- *Change directory*. Use this item to move a document to another directory at a specified time.

After choosing one of these tasks, the options available to you vary depending on the choice you have made.

26.1.1 Publishing, unpublishing and deleting a document

If you choose *Publish*, *Unpublish* or *Delete*, you can go directly to the *Frequency* select box to determine the time span between scheduled events.

26.1.2 Changing a document type

If you choose *Change document type*, the *Document type* selection box appears under the *Task* select box (see Figure 339). Select an existing document type from your list.

Figure 339 Document type select box

The screenshot shows the 'Scheduler PRO' dialog box with the 'Task' dropdown set to 'Change document type'. The 'Document type' dropdown is set to 'test'. The 'Frequency' is set to 'Once'. The 'Date/Time' is set to 06:02 on 20/04/2004. The 'Active' checkbox is checked, and the 'Use default values' checkbox is unchecked.

26.1.3 Changing the categories for a document

If you choose *Change categories*, the *Categories* selection field appears under the *Task* select box (see Figure 340). Click the *Add* button to open the category browser. Choose a category. Click *OK*. If you wish, you can add more categories. You can also remove all of the associated categories by clicking the *Delete all* button

Figure 340 Adding or deleting categories

The screenshot shows the 'Scheduler PRO' dialog box with the 'Task' dropdown set to 'Change categories'. The 'Categories' field is empty. The 'Frequency' is set to 'Once'. The 'Date/Time' is set to 06:02 on 20/04/2004. The 'Active' checkbox is checked. There are 'Delete all' and 'Add' buttons next to the 'Categories' field.

26.1.4 Changing the directory document

If you choose *Change directory*, the *Directory* selection field appears under the *Task* select box (see Figure 341). Click the *Select* button to open the server browser. Choose a directory. Click *OK*.

Figure 341 Selecting a new directory

The screenshot shows the 'Scheduler PRO' dialog box with the 'Task' dropdown set to 'Change directory'. The 'Directory' field is empty. The 'Frequency' is set to 'Once'. The 'Date/Time' is set to 06:02 on 20/04/2004. The 'Active' checkbox is checked. There is a 'Select' button next to the 'Directory' field.

26.2 Scheduling a task

You use the *Frequency* select box to choose the frequency of a task. The options available to you vary depending on the choice you make.

26.2.1 Scheduling an item once

If you choose *Once* from the *Frequency* select box, the following screen appears (see Figure 342).

Figure 342 Scheduled frequency: Once

Select the date at which the task is to take place, by entering the date according to day, month, year.

Select the time in hours and minutes.

Note: After the completion of the scheduled task, the item will appear "inactive" on the main document edit page.

26.2.2 Scheduling an hourly task

If you choose *Hourly* from the *Frequency* select box , the following screen appears (see Figure 343):

Figure 343 Scheduled frequency: Hourly

Choose a time (in minutes) between "00" and "59". The item will be scheduled at that minute every hour.

26.2.3 Scheduling a daily task

If you choose *Daily* from the *Frequency* select box , the following screen appears (see Figure 344):

Figure 344 Scheduled frequency: Daily

Select the time in hours and minutes at which you wish the task to be completed each day.

26.2.4 Scheduling a weekly task

If you choose *Weekly* from the *Frequency* select box , the following screen appears (see Figure 345):

Figure 345 Scheduled frequency: Weekly

Select the time and the day that you wish to schedule your task. The task will be executed each week at the chosen time and on the chosen day.

26.2.5 Scheduling a monthly task

If you choose *Monthly* from the *Frequency* select box , the following screen appears (see Figure 346):

Figure 346 Scheduled frequency: *Monthly*

Frequency: Monthly

Time: 12 00

Days:

<input checked="" type="checkbox"/> 01	<input type="checkbox"/> 02	<input type="checkbox"/> 03	<input type="checkbox"/> 04	<input type="checkbox"/> 05	<input type="checkbox"/> 06	<input type="checkbox"/> 07	<input type="checkbox"/> 08	<input type="checkbox"/> 09	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14
<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	<input type="checkbox"/> 25	<input type="checkbox"/> 26	<input type="checkbox"/> 27	<input type="checkbox"/> 28
<input type="checkbox"/> 29	<input type="checkbox"/> 30	<input type="checkbox"/> 31											

Select the time and the date that you wish to schedule your task. The task will be executed each month at the chosen time and on the chosen date.

26.2.6 Scheduling a yearly task

If you choose *Yearly* from the *Frequency* select box , the following screen appears (see Figure 347):

Figure 347 Scheduled frequency: *Yearly*

Frequency: Yearly

Time: 12 00

Months:

☒ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

Days:

<input checked="" type="checkbox"/> 01	<input type="checkbox"/> 02	<input type="checkbox"/> 03	<input type="checkbox"/> 04	<input type="checkbox"/> 05	<input type="checkbox"/> 06	<input type="checkbox"/> 07	<input type="checkbox"/> 08	<input type="checkbox"/> 09	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14
<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	<input type="checkbox"/> 25	<input type="checkbox"/> 26	<input type="checkbox"/> 27	<input type="checkbox"/> 28
<input type="checkbox"/> 29	<input type="checkbox"/> 30	<input type="checkbox"/> 31											

Select the time, the month and the date that you wish to schedule your yearly task. The task will be executed once a year at the chosen time in the chosen month and on the chosen date.

26.3 Options when saving a scheduled task

The Scheduler PRO Module has the following save options which you access at the bottom of the *Documents* main screen (see Figure 348).

Figure 348 Saving a scheduled task

In workflow Unpublish Save ☒ Publish after saving ☐ New page after saving

All tasks of the Scheduler PRO Module will only be completed if you activate the *Publish after saving* checkbox when saving your document.

If you have scheduled a task and selected the *Publish after saving* checkbox, the document will not be published immediately, but rather at the scheduled time.

27 Shop Module: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Shop Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Shop Module. These topics are treated in the following sections:

- Section 27.1, "What is the webEdition Shop Module?" on page 309
- Section 27.2, "Installation" on page 309
- Section 27.3, "General information and navigation" on page 310

27.1 What is the webEdition Shop Module?

The webEdition Shop Module is a toolkit that can assist you to set up a Web-based shopping site.

With the Shop Module you can

- create any number of items or item groups
- design item summaries (listviews) and detailed item views
- place shopping carts anywhere on your pages
- organize your order management
- perform transaction calculations (sales taxes, discounts, etc.)
- use an open interface to a payment provider
- integrate your shop data with the webEdition Customer Management Module

27.1.1 Intended users

The Shop Module is a toolkit intended for advanced users of webEdition, and those with a knowledge of e-commerce Web site architecture and design. Knowledge of the webEdition template development processes, and webEdition tags (we:tags) are required in order to develop an online shop.

27.1.2 Interaction with the Customer Management Module

The Shop Module needs the webEdition Customer Management (PRO) Module to be installed. You cannot use the Shop Module without the Customer Management Module.

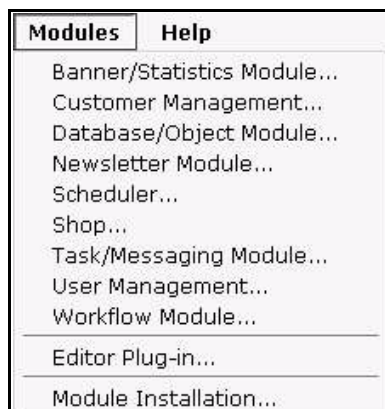
27.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

27.3 General information and navigation

After installation, you will find a new menu item in the main menu called *Modules*, which contains all the modules in your installation of webEdition (see Figure 349).

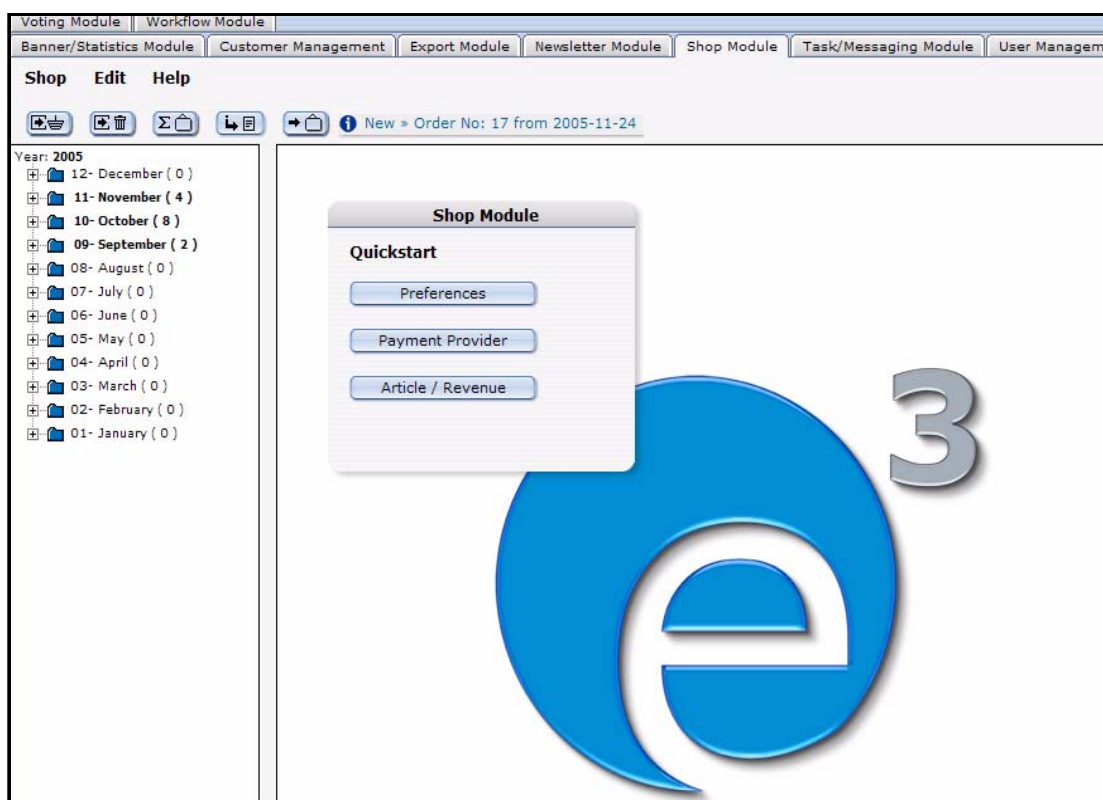
Figure 349 *Modules* drop-down menu



27.3.1 Shop Module Quickstart

Click on *Modules* > *Shop* to open the module summary window containing the Shop Module. The *Quickstart* screen for the Shop Module opens (see Figure 350).

Figure 350 The Shop Module start screen with *Quickstart*



27.3.1.1 Preferences

The module opens with the *Shop Quickstart* dialog box. Click the *Preferences* button to set your initial Shop preferences. You can choose from the following options:

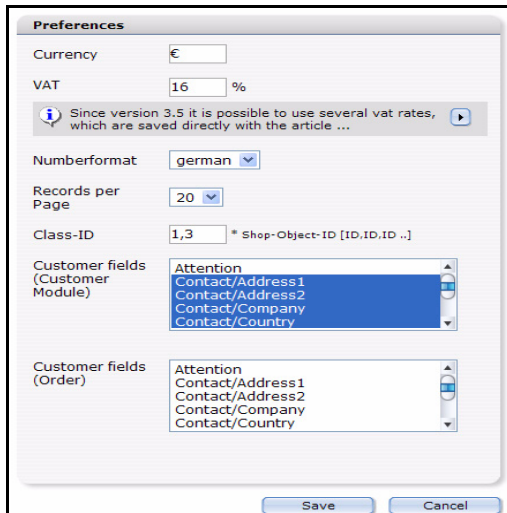


Figure 351 Shop settings screen

- *Currency*. Select the currency of choice.
- *VAT*. Set the tax rate (as a percentage) that you are obliged to collect.
- *Number format*. Choose the number format from the select box: *German*, *English*, *French*, or *Swiss*
- *Records per page* Set the number of records to be displayed per page.
- *Class-ID* This field is only displayed, if the *Database /Object Module* is installed. If objects are to be used as shop articles, the IDs of all classes containing shop articles must be

entered here comma-separated. This includes the listing of all shop articles as well as the features to extend orders. In the field Class-ID many classes can be entered arbitrarily.

- *Customer fields (Customer Module)*: Select here the fields to be indicated (from the Customer Management Module). To select several fields, please hold the Shift key while selecting. These preferences concern the announcement within the Shop Module.
- *Customer fields (Order)*: Select here the fields which should be indicated the customer. As a rule customer's fields of the Customer Management are used to hold on current dates of the customer, as for example comments to the customer of the web pages operating authority (payment behavior, etc. ...). By contrast customer fields of the order are necessary, around address dates, etc. to be able to prove at the time of the order, so that also afterwards still valid order dates are available.

Save your preferences by clicking on the *Save* button.

Note: You can change these preferences at a later date by selecting *Shop > Settings...* from the main drop-down menu.

27.3.1.2 Payment Provider

Click in the Quickstart menu on the button Payment Provider, the corresponding window is opened (see

Figure 352 Payment Provider

Payment Provider

Available fields for transmitting to a payment provider

Forename	Forename	▼
Surname	Surname	▼
Street	Contact_Address1	▼
Zip	Contact_Zip	▼
City	Contact_Address2	▼

PayPal

Country Code	Deutschland	▼	* (ISO)
Business	test@test.de * PayPal E-Mail		
Account	Sandbox (Test)	▼	* Test or Live Account

Saferpay

Language	english	▼	* en, de, fr, it
Account-ID	123-234-234 * Serial-No		
Shop Owner	test@test.de * Notify Email		
allow collect?	No	▼	* see saferpay Manual !
additional. Form?	No	▼	* for Deliveryaddress
Confirmation	No	▼	* Confirmmail to Customer
Providerset	69,77,79 * comma-separated!		
exec-path	* z.B. /usr/local/bin/		
conf-path	* path to saferpay		
Description	Thanks for your order! * e.g. order		

For more information about Payment Providers, please refer to 29, "Linking to a payment provider" on page 335.

27.3.1.3 Article/Revenue

Click the *Article/Revenue* button to open the view of that name.. In this view, the tabs *Article dokuments*, *Article objects* and *Revenue overview* are located(see Figure 353).

Note: Notice please that the Article objects tab only exists if you have installed the DB/Object Module, article properties exist and the correct Class-ID is defined in the preferences! (cf also Section 27.3.1.1, "Preferences,")

Figure 353 Article/Revenue-view: Article documents

Shop Edit Help

New » Order No: 17 from 2005-11-24

Article documents Article objects Revenue overview

List of all articles: 14

Article Name	ID	Type	Creation Date	Last Updated
Dame..	82	Dokument	2005-08-10 - 16:31	2005-08-10 - 16:55
Kariierter Pullover in Bla..	30	Dokument	2005-08-08 - 14:31	2005-09-16 - 12:40
Lachen um jeden Preis..	108	Dokument	2005-09-16 - 13:39	2005-09-16 - 14:16
Pink 3D..	54	Dokument	2005-08-10 - 13:49	2005-08-10 - 14:09
Pinke Skisocken..	65	Dokument	2005-08-10 - 15:26	2005-09-16 - 12:41
Roter Baumwollpullover..	26	Dokument	2005-08-08 - 11:09	2005-09-16 - 12:40
Rotes T-Shirt..	98	Dokument	2005-08-31 - 15:39	2005-09-16 - 12:42
Schach..	78	Dokument	2005-08-10 - 16:08	2005-08-10 - 16:26
Schwarze Herrensocken..	71	Dokument	2005-08-10 - 15:37	2005-09-16 - 12:41
Skatspiel - Apfelblatt..	87	Dokument	2005-08-10 - 16:33	2005-08-11 - 10:11
Sumpfpfau..	73	Dokument	2005-08-10 - 15:26	2005-08-10 - 16:02
Tennissocken Schwarz - We..	61	Dokument	2005-08-10 - 14:19	2005-09-16 - 12:41
we Pullover blau..	33	Dokument	2005-08-08 - 14:39	2005-09-16 - 12:39
World of Office - RPG..	63	Dokument	2005-08-10 - 14:10	2005-08-10 - 15:25

This view displays all articles (documents and objects). If you click on an article, the suitable article is opened in the webEdition main window and can be edited immediately. The listing itself is tabular with the most important info to the suitable articles including the info whether the respective article has variants. The list is sortable by click on the suitable heading. The representation corresponds in color usual webEdition rules, a not published article (document or property) is displayed, for instance, red.

Click on the card index rider Revenue overview to let indicate the orders of a certain calendar year. Also here the listings can be sorted by click on a heading. Also here there is a color convention- paid-up or worked on orders are displayed green.

Figure 354 Artikel/Umsatz-Ansicht: Umsatzübersicht

Article documents | Article objects | Revenue overview

Revenue in the year 2005

Jahr auswählen: 2005

Monat auswählen: -

Select

Year	Order quantity	Unprocessed	Paid	Unpaid	Sales total
2005	14	14	0,00 €	1.877,54 €	1.877,54 €

contains VAT:

16 %	189,81 €
7 %	13,51 €
9 %	11,30 €
8 %	6,96 €

Order	Article Name	Price	Date of Order	Article-ID	Paid
11	Pinke Skisocken	7,00 €	13.10.2005	65	pending
12	webEdition Wasser sort=still	17,85 €	13.10.2005	14	pending
12	Lachen um jeden Preis	15,75 €	13.10.2005	108	pending
12	Pinke Skisocken	7,00 €	13.10.2005	65	pending
13	Schach	44,00 €	13.10.2005	78	pending
13	Tollkirsche	15,00 €	13.10.2005	7	pending
13	Dame	44,00 €	13.10.2005	82	pending
14	wE Pullover blau	32,00 €	22.11.2005	33	pending

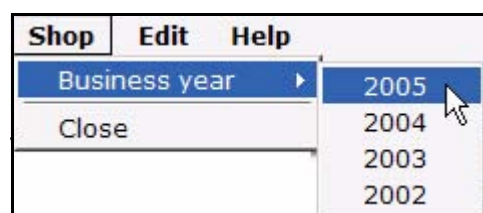
27.3.2 The Shop Module main screen

The Shop Module main screen has three drop-down menus: *Shop*, *Edit*, and *Help*.

27.3.2.1 The *Shop* menu

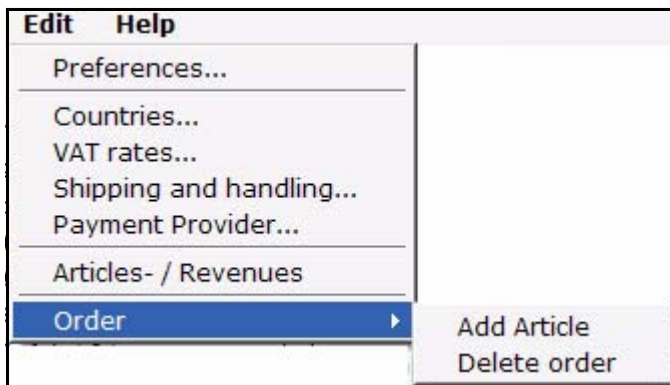
The *Shop* menu contains the following items (see Figure 355, "Shop drop-down menu" on page 314).

- *Business year*. Select the year you want to be displayed.
- *Close*. Use this command to exit the module.

Figure 355 Shop drop-down menu

27.3.2.2 The *Edit* menu

In the *Edit* menu, the following items can be selected (see Figure 356, "Edit drop-down menu" on page 315).

Figure 356 *Edit* drop-down menu

- *Preferences*: Opens the *preferences* window (see Section 27.3.1.1, "Preferences,")
- *Countries*: A window is opened in which you can determine the regulations specific for countries with regard to the value added tax clause.

Figure 357 Value added tax regulations specific for countries

Ruleset: Customers of which states have to pay VAT

Default value:

Default value determines the result of `we:ifShopPayVat`, if none of the following rules is matching. If no rule is defined, the default value is returned.

Field of Country:

Select the field of the Customer Module containing the country of origin (billing address). It is used to decide, whether the customer has to pay VAT or not.

States liable to VAT:

Customer from these countries, must pay VAT.

States not liable to VAT:

Customer from these countries must not pay VAT.

States with special rules:

Customer from these countries only have to pay VAT, if also an additional rule matches.

Additional Rule:

Result:

- *Default value*: Standard return value for `<we:ifShopPayVat>` in case none of the opposed rules applies
- *Field of Country*: In this field the name of the field is stored in the customer management which contains the origin land (invoice address).

- *States liable to VAT*: Customers from these countries must pay VAT.
- *States not liable to VAT*: Customers from these countries must not pay VAT.
- *States with special rules*: Customer from these countries only have to pay VAT, if also an additional rule matches.
- *Additional rule*: The field in the customer management called (e.g.: ustid) corresponds to a condition (e.g., blank), then the value opposed here is returned (e.g.: A customer must pay VAT (true) if he has none ustid (ustid is empty) and must come from one of the defined countries).

Example

```
<we:ifShopPayVat>
  Customer has to pay VAT.
  (-> calculate VAT)
<we:else />
  Customer has not to pay VAT.
</we:ifShopPayVat>
```

- *VAT rates*: The *Edit VAT rate* window opens (see Figure 358)

Figure 358 Edit VAT rate

Id	Name	VAT rate	Standard
1	Normal rate	16%	Ja
2	Reduced rate	8%	Nein

+

Edit VAT rate

Name:

VAT rate: %

Standard:

Here you can define different VATs. Select for a new tax rate a suitable name, enter the suitable percent number and determine whether it should concern the standard rate of taxation. Click then on *Save*

Should no value added tax clause be assigned to an article, the opposed standard clause is taken, if available. If still no values are entered here, the earlier entered VAT is used for compatibility reasons. Then the VATs entered here can be integrated by shop documents as well as by shop properties. Besides, during the complete purchasing process exclusively the id of the VAT is used. Only if the order is closed and is stored in the database, the VAT valid at the time of the order is saved. Therefore, an additional adaptation of the VAT does not alter finished orders

- *Shipping and handling*: The *Shipping and handling* window is opened

Figure 359 Shipping and Handling

- *Field of country*: In this field you select the field of the customer management in which the origin land of the customer is stored
- *VAT*: The value added tax clause which should apply to postal charges and packaging. This can be selected from the defined sets
- *Prices are net*: If the prices are net or gross. This is important especially in the shop backend, all these specifications are stored with the order process and are taken into consideration within the order view. In the Template itself these values can be freely used
- *Existing rates*: List of all defined rates
- *Name*: Internal used name. Is used for *Existing rates*
- *Countries*: List of countries to which this rule should apply.
- *Cost*: The dependence on order value and forwarding expenses can be entered in this list graded. In this example a purchasing to 20 euros of 10 euros of forwarding expenses, between 20 and 100 euros of order value 5 euros, and more than 100 euros costs nothing more.
- *Standard*: If no other rule of the forwarding expenses applies, the standard rule is used always.
- *Payment Provider*: Opens the *Payment Provider* window. See Section 27.3.1.2, "Payment Provider" on page 311

- *Articles-/Revenues*: Opens the corresponding window, see Section 27.3.1.3, "Article/Revenue" on page 312
- *Order*: Has the following sub-menu items:
 - *Add Article* Adds, from before defined articles, to the current order. You may perform this action also with the Quickbutton



Figure 360 Add article quickbutton

- *Delete Order*: deletes the selected order. You may perform this action also with the Quickbutton



Figure 361 Delete order quickbutton

Note: To be able to add an article to an order or to delete a complete order, you must at first have selected an existing order in the explorer menu.

27.3.2.3 The Help menu

The help menu has two options:

- *Info...* Select this option to access information about the license holder and the version of webEdition you are using.
- *Help...* Select this option to access the *webEdition Help System*.

27.3.3 The Shop Module main screen

The start screen (see Figure 362, "Shop Module main screen" on page 319), is divided into two parts:

- explorer menu, on the left side
- order processing screens, on the right side

Figure 362 Shop Module main screen

The screenshot shows the Shop Module main screen. On the left is the Explorer menu for the year 2005, listing months from January to December with order counts in brackets. On the right is the 'Overview' tab showing 'Revenue in the year 2005'. It includes dropdowns for 'Jahr auswählen' (2005) and 'Monat auswählen' (November), a 'Select' button, and a summary table for November 2005. Below this is a table of orders with columns for Order, Article Name, Price, Date of Order, Article-ID, and Paid status.

Year	Month	Order quantity	Unprocessed	Paid	Unpaid	Sales total
2005	11	4	4	0,00 €	182,39 €	182,39 €

contains VAT:

16 %	9,44 €
8 %	6,96 €

Order	Article Name	Price	Date of Order	Article-ID	Paid
14	wE Pullover blau	32,00 €	22.11.2005	33	pending
14	Rotes T-Shirt sort=m	17,00 €	22.11.2005	98	pending
14	Lachen um jeden Preis (TB) Variant: Taschenbuch	10,99 €	22.11.2005	108	pending
14	Grüner Kugelfisch Variant: Grün	76,00 €	22.11.2005	6	pending
15	Roter Baumwollpullover	10,00 €	24.11.2005	26	pending
16	Roter Baumwollpullover	10,00 €	24.11.2005	26	pending
17	Roter Baumwollpullover	10,00 €	24.11.2005	26	pending

27.3.3.1 The explorer menu

The explorer menu acts as a directory of all Shop Module orders in a business year. Each month is represented by a folder. By clicking on the "+" character to the left of the folder, you can open the directory for that month to view a list of all orders. The number in brackets adjacent to the month indicates the number of orders for that month.

27.3.3.2 The order processing screens

The order processing screen has two views. Monthly overview, and the order processing screen, each of which are accessed by clicking on items in the explorer menu.

27.3.3.2.1 Monthly overview. If you click on a month folder itself, a summary appears in the right side of your screen, showing the number of processed and unprocessed Shop orders. Below this area is a statistical evaluation that reports the total sales, and the number paid/unpaid invoices for that month (see Figure 363).

Figure 363 Monthly overview

The screenshot shows the 'Overview' tab of the Monthly overview screen. It displays the same summary table as Figure 362 for November 2005, followed by a VAT breakdown table.

Year	Month	Order quantity	Unprocessed	Paid	Unpaid	Sales total
2005	11	4	4	0,00 €	182,39 €	182,39 €

contains VAT:

16 %	9,44 €
8 %	6,96 €

27.3.3.2.2 The Order Data view If you click on a specific Shop item listed in one of the monthly directories, webEdition will display the processing data for that order on the right side of the screen (see Figure 364).

Figure 364 Order Data view

Order and customer data

Order no.: 8 Order date: 12/02/05

Processed on: -

Paid on: -

First name: Michael

Last name: Tester

Contact_Address1: Teststrasse 5

Contact_Address2: Teststadt

Contact_Country: Schweiz

Contact_Company:

[Edit data of customer within this order.](#)

[Open this customer in customer management module.](#)

Quantity	Title	Description	Price	Total
1	Oranger Pullover mit Logo	Pullover der Spitzenqualität mit eingestickte... Variant: Orange	32,00 €	32,00 € <input type="button" value="trash"/>
1	ParagrapheAddOn	Das ParagrapheAddOn erweitert WoO (World of ...) Variant: Paragraphe AddOn	88,00 €	88,00 € <input type="button" value="trash"/>
Price:			120,00 €	
Shipping and handling:			10,00 €	
Calculate VAT			<input type="checkbox"/>	
Total price:			130,00 €	

Further comments to this order

shop_comment: Ihre Meinung

shop_opinion: sehr gut

The *Order Data* view has two areas: *Order and user details* and *Items ordered*.

You can modify the order data by clicking on the *Edit* buttons. webEdition will open a dialogue box in which you can edit the corresponding values as seen in Figure 365.

Figure 365 Editing an order

?

Please enter the date.

12/01/05

27.3.3.3 Viewing all of a customer's orders

You can view all orders placed by an individual customer by selecting the *All Customer's Orders* tab, which is adjacent to the *Order Data* tab (see Figure 366).




Thereafter, if you click on the (underlined) item number or date for an order, webEdition will open the corresponding *Order Data* screen for that order.

Figure 366 Viewing all of a customer's orders

Order and customer data

All customer's orders

All customer's orders: webEdition Software GmbH

order	ordered on	processed on	payed on	
4. order	12/02/05	-	-	
2. order	12/02/05	-	-	
1. order	11/02/05	-	-	

28 Configuration of the Shop Module

In this chapter you find out how you configure the shop module. The following items are discussed:

- Section 28.1 "Variants" on page 323
- Section 28.2 "Product groups by categories" on page 325
- Section 28.3 "Freely determinable fields" on page 327
- Section 28.4 "Value added tax" on page 329
- Section 28.5 "Shipping" on page 333

28.1 Variants

From webEdition version 3.5 it is possible to use variants of articles.

28.1.1 Variants of shop articles

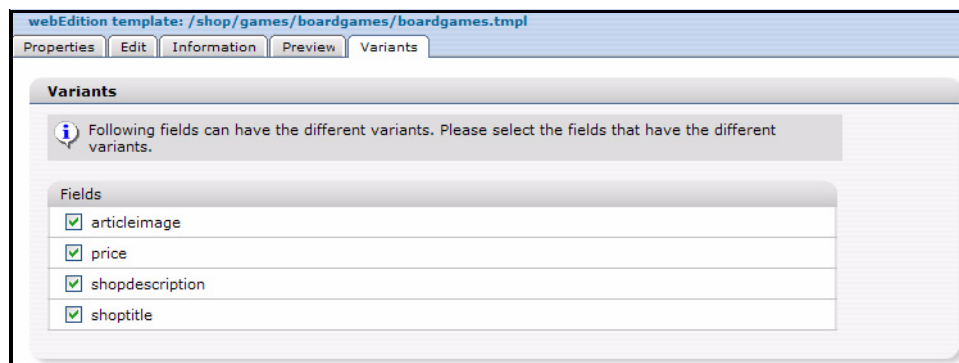
An improvement desired for a long time for the shop module is the possibility of variants for shop articles. With the sales of similar articles it is very laborious to put on a completely new article every time, although merely the color differs. Now from webEdition 3.5 it is possible to create several variants for a shop article. These own all properties of the original article and "overwrite" merely the varying elements. Hence, an article variation is dependent always from the original article and can be called only in its context.

At the moment only variants of shop articles can be created, i.e. the template class must contain the fields specific for shops: *shopdescription*, *shoptitle* and *price*. Only if these fields can be found, it is possible to create variants.

Which articles and fields own variants is set directly in the class or template. One creates variants on a concrete article directly within aforesaid object or document.

28.1.2 Variants in article documents

To create variants for articles based on documents, fields for the variants have to be specified in the template. Variants can be created only if the template contains the shopspecific fields *shoptitle*, *shopdescription* and *price*. If this is the case, the template has the tab "Variants". In the Variants view of a template a list of all suitable fields of the template is displayed which can be marked with a checkbox as active.

Figure 367 Variant fields in the template

Note: Variants can only be created for dynamic documents!

If variant fields are defined in a template, all documents which are based on this template have the new tab *Variants*. Here the different variants can be created and maintained. The editing of the variants is analogue to the editing of blocks. In addition to the fields defined in the template a field required for the internal use "Name" is created by which the variant can be called (by request `we_variant = <NAME>`)

28.1.3 Variants in article-objects

If objects with variants should be used, the corresponding filed must be declared at first in the class. Analogously to variants with documents, a class permits only variants if the fields *shoptitle*, *shopdescription* and *price* exist. Whether and which fields should be used for variants, then can be determined directly at the field administration. Also here only picture fields or text fields can be used for variants.

Figure 368 Variant fields for objects in classe

 The screenshot shows a configuration form for 'Variant fields for objects in classe'. It has several input fields: 'Name' with the value 'shoptitle', 'Type' with a dropdown menu showing 'Text input', 'Length' with the value '255', and 'Default' which is empty. Below these are two radio buttons: 'Title' and 'Description', both of which are unselected. There are two checkboxes: 'Required field' (unchecked) and 'Variant field' (checked). The 'Variant field' checkbox is highlighted with a red rectangular box. At the bottom of the form, there is a 'Users' section with a dropdown menu showing 'Everybody'. To the right of the 'Users' section are two buttons: 'Delete all' and 'Add'.

Object variations are analogously edited to document variations. Only the preview button is absent here, because it depends on the operating range which template should be used for the view. Object variations function only if in the template the `we:tag <we:useShopVariant/>` exists. Also here the real object is initialized and then, when

required (? we_variant = <NAME>), overwritten by the data of the variant. Likewise <we:useShopVariant/> must be integrated, before the first field is displayed.

28.2 Product groups by categories

Online shops require gradation of the offered articles in product groups. In webEdition this can be realized with categories. For this purpose, the categories were extended with some functions.

28.2.1 Advanced category functions

Categories can be provided from webEdition 3.5 with a title and description text. Select for this the menu item *Options > categories* in the webEdition main window (see). If a category is selected, title and description can be edited.

Figure 369 Kategorie Ansicht

These fields can now be put out with a `<we:listview type="category">`. Thus farther operational areas offer. Now beside category names - titles, heading, Id and ParentId - can be displayed, too. With this, these informations can also be used with a listview of documents or objects.

28.2.2 `<we:listview type="category">`

The tag `<we:listview type="category">` has been added from version 3.5. With it, it is possible to display all entries of a category folder.

Example

`<we:listview type="category" parentid="5">` Listview for all categories which are in the category folder with id 5. Beyond this, it is possible to set the parentId with `$ _REQUEST ['we_parentid']`. You can determine the name of these request variables for the attribute parentIdname by yourself. If none is

specified (neither as an attribute nor as request), a Listview about the Root directory of the categories is created.

With the attribute `categoryids` one or several categories can be displayed:

`<we:listview type="category" categoryids="7,9">`. The attribute `categoryids` may also be used in a standard `listview`. Then it serves as a substitute for the attribute `categories`. Should `categories` and `categoryids` be set, precedence has always `categoryids` !

Within the category Listview the single fields of the category can be displayed, as usual, with `we:field`. The following Keys (name of the fields) exist:

- `ID` or `WE_ID` = ID of the category
- `Category` = Name of the category
- `ParentID` = ID of the parent category
- `Title` or `WE_TITLE` = Title of the category
- `Description` or `WE_DESCRIPTION` = Descriptiontext of the category
- `Path` oder `WE_PATH` = pathe of the category

Here, too, the attribute `hyperlink="true"` may be used. Then if necessary a hyperlink is placed on the same document with the request variables `we_parentid` (or `parentidname`). Now within the `<we:repeat>` tag, with the tag `<we:ifHasChildren>`, can be requested, if the actual category-folder contains categories. From version 3.5 it is possible to create interlocking listviews! Here an example for hierarchical listing of categories:

```
<we:listview rows="2" type="category" name="outer">
  <we:repeat>
    <b><we:field name="Category" hyperlink="true"></b><br>
    <we:field name="Title"><br>
    <we:field name="Description">
    <we:setVar to="global" nameto="cat" from="listview"
namefrom="Category" />
    <we:ifHasChildren>
      <i>The category has children</i><br>
    </we:ifHasChildren>
    <we:listview type="document" categories="\$cat" name="inner"
rows="2">
      <we:ifFound>
        <we:repeat>
          - <we:field name="WE_PATH" type="text"
hyperlink="true"><br />
        </we:repeat>
        - <we:back>back</we:back>
        - <we:next>next</we:next>
      </we:ifFound>
    </we:listview>
  </we:repeat>
  <we:back>back</we:back>
  <we:next>next</we:next>
</we:listview>
```

This makes it very easy to display multi-hierarchical product groups.

28.2.3 `<we:category>`

`<we:category>` could display up to now only information about the category(ies) of the current document. This was extended with the attributes `field` and `id`. The attribute `field`

permits the access to the new fields of the category, with the attribute *id* a certain category (independent of document) can be read out

Example

- `<we:category field="Title" />` displays the title of the category of the current document (or Listviewentry within Listviews)
- `<we:category field="Description" />` displays the description of the category of the current document (or Listview entry within Listviews)
- `<we:category id="7" />` displays the name of the category with id 7
- `<we:category id="7" field="Description" />` displays the description of the category with id 7

28.3 Freely determinable fields

Now in the shop from webEdition version 3.5 free input fields are also realizable for shop articles. Thereby it is possible without variants to let adjust special values of an article only by the customer (e.g., sizes or colors of articles). The shop operator can determine for these free fields then either values (-> make available Select menu) or a free input field in which the customer can enter a desired text himself.

Beside free fields in shop articles the free fields can be also added to an order which are then displayed in the webEdition shop module. Thus, for instance, comments can be saved directly with the order.

28.3.1 Freely determinable fields in shop articles

With the tag `<we:shopField>` input fields can be generated on a shop article page. If an article is put in the shopping cart, these fields are saved there. This is possible for document articles as well as for object articles. In addition, these free fields are saved in separate fields of the document (in the shopping cart) to be able to recognize them later again. Besides, `<we:shopField>` generates arbitrary input fields with a certain name. If the article (together with own fields) transmits then with a form to the shopping cart, these fields are added to the article. It is possible to define arbitrarily many free fields and to save them with the article. The destination page of this form must contain the tag `<we:createShop>`, so that the fields can be created.

`<we:shopField>` has the following parameters:

- *name*: Name of the field; with this name the field is saved in the article (shopping cart).
- *reference*: Determines, whether the free field belongs to an article or shopping cart.
- *shopname*: Name of the shop being used
- *type*: Set the entry field to be created
- *value*: preset value
- *values*: comma-separated list for *type*="choice" and "select"
- *checked*: Set the checkbox activated or not

- *mode*: Only for type=choice. Several values can be selected, these are attached comma-separated
- *xml*: Create input field xhtml-valid

Depending on reference from we:shopField the names of the generated input fields vary. With reference = "article" an input field is generated which is added to an article, this has the name we_sacf [<name>].

These free fields are saved in every article of the shopping cart and can be displayed with we:field or we:shopfield ... type = "print" within we:listview for the shopping cart.

```
<table>
<we:repeatShopItem shopname="demoshop">
<tr>
  <td><we:field name="shoptitle" hyperlink="true"></td>
  <td><we:field name="sort"></td>
  ...
</tr>
</we:repeatShopItem>
</table>
```

In the order view in the shop module these free fields are visible under the description of the article.

Figure 370 Freely determinable field in article

Edit data of customer within this order. Open this customer in customer management module.				
Quantity	Title	Description	Price	T
<u>1</u>	Grüner Apfel	Geniessen Sie die frische unserer unbehandelt...	<u>10,00 €</u>	10
<u>1</u>	Baseballmütze	Unsere Baseballmützen sind von hervorragender...	<u>17,00 €</u>	17
		sort: s:		

28.3.2 Freely determinable fields in orders

The free fields in orders work analogously to free fields of articles. However, besides, is used *we:shopField reference = "cart"*. Also here many free fields can be added arbitrarily to an order. The free order fields are indicated in the order view of the shop, can be displayed during the order, however, also with *<we:shopField type = "print" ./>*. These fields are used for the input as follows

```
Comment:
<we:shopField reference="cart" name="shop_comment"
shopname="demoshop" type="textarea" />
```

If you want to display this again to send it, for example, by mail or as a control for the user, following syntax can be used:

```
Komment:
<we:shopField reference="cart" name="shop_comment"
shopname="demoshop" type="print" />
```

only the field is returned.

Also here is to be noted that the page, from which the form is sent off absolutely must include `we:createShop`. Then the fields are listed with the accompanying order.

Figure 371 Free fields in order

These fields can be deleted or edited after click on the suitable icon .

28.4 Value added tax

28.4.1 Value added tax set associate to a document

With `<we:shopVat>` a certain value added tax set can be assigned to an article. Besides, a list with the sets entered in the shop module from which one can select the desired one is generated. `<we:shopVat type = "select"/>`, for instance, generates a dropdown menu for the edit mode of the document with the pre-defined VATs

Figure 372 VATs in the dropdown menu (german example)

With `<we:shopVat id = "1"/>` one can display the value added tax set of the selected Id. This is sensible to be able to expel different VATs in the shopping cart decollated.

28.4.2 Value added tax sets for an object

If objects are used as shop articles, these can also use the value added tax sentences described on top. From version 3.5 the field type `shopVat` (value added tax field) has been added to classes. The name `shopvat` is a constant and cannot be changed. Objects of a class with this field can select the value added tax set then analogously to documents from within the shop module to built in sets. Then the output of the VAT set on the web site occurs like for other elements

`<we:field type="shopVat" />` respectively `<we:var type="shopVat" />`

Figure 373 Taxes with *shopvat* in a class

Name	shopvat
Type	VAT field
Default	<div> <div>8 - Ermäßigter Satz</div> <div>16 - Normaler Satz</div> <div>8 - Ermäßigter Satz</div> </div>
Users	<div> <div>Everybody</div> </div>
<div> <div>Delete all</div> <div>Add</div> </div>	

28.4.3 Using VATs

With `<we:shopVat />` for documents and `<we:field type="shopVat" />` or `<we:var type="shopVat" />` for objects or Listviews (also shopping cart) the VATs are displayed on the website.

To allow a flawless work with value added tax sentences, these are called on the complete web site by their Id. This offers numerous possibilities to work with the different sets and enables you to change the sets at a later time without influencing the functionality of the underlying templates. The tag `<we:ifShopVat id = "...">` controls whether the current document, or the current entry has the value added tax set with the specified Id in a Listview. Thus, different value added tax sentences can be decollated and expeled easily. A shopping cart could look as follows:

```
<we:repeatShopItem shopname="demoshop">
  <tr>
    <td><we:field name="shoptitle" hyperlink="true" /></td>
    <td class="shoppingCartNumber">
      <we:showShopItemNumber shopname="demoshop" />
    </td>
    <td class="shoppingCartNumber textBold">
      <we:calculate sum="totalPrice" num_format="german">
        <we:showShopItemNumber type="print" shopname="demoshop" /> *
        <we:field name="price" />
      </we:calculate> &euro;
    </td>
  </tr>
  <we:ifShopPayVat>
    <we:ifShopVat id="1">
      <we:calculate print="false" sum="totalVat1">
        <we:showShopItemNumber type="print" shopname="demoshop" /> *
        <we:field name="price" /> /
        100 *
        <we:field type="shopVat" />
      </we:calculate>
    </we:ifShopVat>
    <we:ifShopVat id="2">
      <we:calculate print="false" sum="totalVat2">
        <we:showShopItemNumber type="print" shopname="demoshop" /> *
        <we:field name="price" /> /
        100 *
        <we:field type="shopVat" />
      </we:calculate>
    </we:ifShopVat>
  </we:ifShopPayVat>
</we:repeatShopItem>
```

In the above example different sums of the complete value added tax are computed according to Id of the used value added tax set. Depending on which value added taxes exist the sums "totalVat1" and/or "totalVat2" are thereby computed.

```
<we:ifVarSet name="totalVat1" type="sum">
  <tr>
    <td class="shoppingCartNumber">zzgl. MwSt. <we:shopVat id="1"
  />%</td>
    <td class="shoppingCartNumber">
      <we:sum name="totalVat1" num_format="german" /> &euro;
    </td>
  </tr>
</we:ifVarSet>
<we:ifVarSet name="totalVat2" type="sum">
  <tr>
    <td class="shoppingCartNumber">zzgl. MwSt. <we:shopVat id="2"
  />%</td>
    <td class="shoppingCartNumber">
      <we:sum name="totalVat2" num_format="german" /> &euro;
    </td>
  </tr>
</we:ifVarSet>
```

Then these both sums must be added for the computed price and the shopping cart is finished.

```
<tr>
  <th class="shoppingCartNumber">Gesamtpreis</th>
  <td class="shoppingCartNumber textBold">
    <we:calculate num_format="german">
      <we:sum name="totalVat1" /> +
      <we:sum name="totalVat2" /> +
      <we:sum name="totalPrice" /></we:calculate> &euro;
    </td>
  </tr>
```

Then the page generated looks as follows

Figure 374 Articles with VAT (german example)

Artikel	- Anzahl	+ x	Preis
Pinker Pullover (16% MwSt)	- <input type="text" value="1"/>	+ x	10,00 €
World of Office - RPG (16% MwSt)	- <input type="text" value="1"/>	+ x	129,00 €
Preis			139,00 €
Versandkosten			10,00 €
zzgl. MwSt. 16%			23,84 €
Gesamtpreis			172,84 €

28.4.4 VATs in the shopping cart

When an order is concluded, and all article data are saved in the database, also the used VATs are saved. Thus it is prevented that additional changes of the VAT alter already existing and concluded orders. In the backend of the shop module, the order can still be edited concerning the value added tax afterwards. An order with variants and user-defined fields can look as follows:

Figure 375 VATs in the order overview

Quantity	Title	Description	Price	Total	Sales tax	
1	Grüner Pullover mit Logo	Pullover der Spitzenqualität mit eingestickte...	32,00 €	32,00 €	(16.00%)	
1	Skatspiel - Klassik	Das altbekannte Skat-Spiel in verschiedenen A...	25,00 €	25,00 €	(16.00%)	
1	Skatspiel Blau	Das altbekannte Skat-Spiel in verschiedenen A... Variant: Blau	27,00 €	27,00 €	(16.00%)	
1	Mineralwasser	Tolles Wasser herrlich erfrischend. Je nach G... sort: still;	17,85 €	17,85 €	(8.00%)	
1	Luxus Wasser	Exquisites Wasser. Dieses Wasser stellt bei w... sort: normal;	125,58 €	125,58 €	(16.00%)	
Price:			227,43 €			
Shipping and handling:			0,00 €			
plus VAT:						<input checked="" type="checkbox"/>
16 %:			33,53 €			
8 %:			1,43 €			
Total price:			262,39 €			

If you want to change afterwards the VAT of an article, merely click the order and enter the desired new value in the opening prompt. In addition, can be decided in the order view afterwards whether the value added tax should be computed. Depending on whether the forwarding expenses were entries net or gross, or whether the data saved in the goods basket were built in as net/gross prices the prices are anew computed in the order then

28.4.5 VAT: special we:tags

28.4.5.1 we:ifShopPayVat

With `<we:ifShopPayVat>` the surrounded contents are only displayed if the logged in customer must also pay value added taxes. Whether a customer must pay taxes, depends primarily on the country to which the product must be delivered. In addition country rules can be defined in the Shop Module under *edit > countries*.

28.4.5.2 we:ifShopVat

With `<we:ifShopVat>` can be controlled whether an article has a certain VAT. This tag is used in shops with several VAT sets.

28.4.5.3 we:shopVat

With `<we:shopVat>` a value added tax set can be assigned to a shop article from the defined VATs. If the attribute id is assigned, merely the value added tax set with the given Id is returned.

28.4.5.4 we:field type="shopVat"

Delivers within a `we:listview` shopping cart, `we:object` the value added tax set of the current article of the entry.

28.4.5.5 we:var type="shopVat"

Analogously to `we:field type = "shopVat"` the accompanying value added tax set is returned here on a detailed page for an object

28.4.5.6 we:writeShopData netprices="true|false" usevat="true"

With `<we:writeShopData>` can be indicated whether the passed prices are Net or Gross. And whether the different value added taxes should be taken into consideration, or not. Default value of both entries is `true`, i.e. by Default prices are accepted Net and the value added tax with is taken into consideration..

28.4.5.7 we:ifVarSet type="sum"

Controls whether the variable of the type `sum` (originates by `<we:calculate sum = "... ">`) is set

28.4.5.8 we:ifNotVarSet type="sum"

Analogously to `we:ifVarSet type="sum"`

28.5 Shipping**28.5.1 Shipping on the website**

The defined postage and forwarding expenses can also be accessed by `we:tags`, according to order value and origin land of the logged in customer the suitable set is determined and returned. However, besides, only the entered costs are returned, then these can be used as desired on the page. These expenses are defined as shown in Section 27.3.2.2.

The value added tax consists of the VAT of the price and the forwarding expenses. This was computed in the template with `<we:calculate>`. The different forwarding expenses can be accessed by means of the `<we:shipping>` tag. Following example shows the application of `<we:shipping>`.

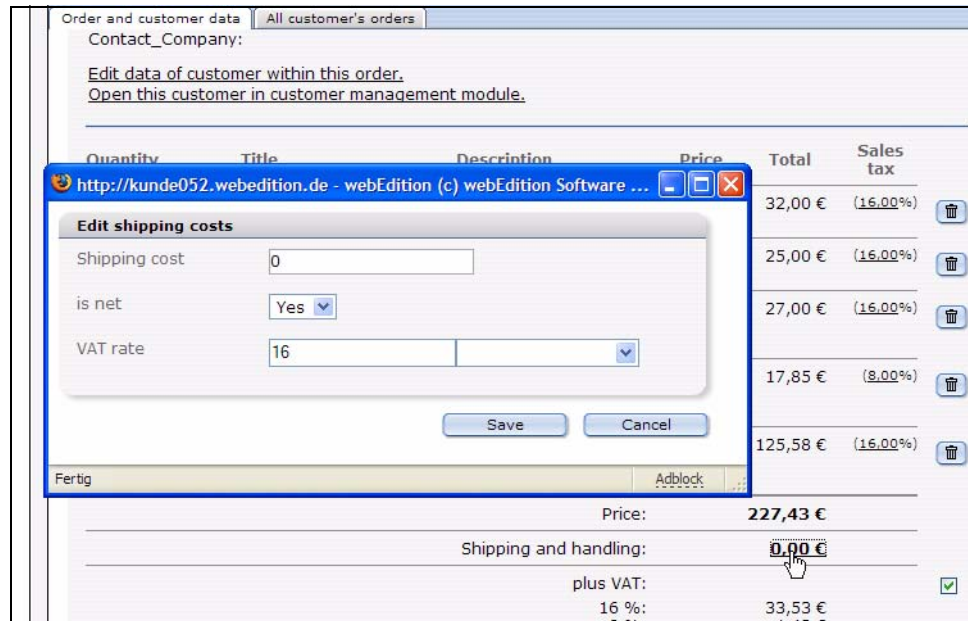
```
<tr>
  <th>Preis</th>
  <td><we:sum name="totalPrice" num_format="german" /> €</td>
</tr>
<tr>
  <th>Versandkosten</th>
  <td><we:shipping sum="totalPrice" num_format="german" /> €</td>
  <we:calculate print="false" sum="totalVat1">
    <we:shipping sum="totalPrice" />/100*<we:shopVat id="1" />
  </we:calculate>
</tr>
<tr>
  <th>zzgl. MwSt.</th>
  <td><we:sum name="totalVat1" num_format="german" /> €</td>
</tr>
<tr>
  <th>Gesamtpreis</th>
  <td>
    <we:calculate num_format="german">
      <we:shipping sum="totalPrice" num_format="german" />
      + <we:sum name="totalVat1" />
      + <we:sum name="totalPrice" />
    </we:calculate> €
  </td>
</tr>
```

In this example the forwarding expenses are displayed and added to the total expenses. In addition, the value added tax of the forwarding expenses is calculated, added up with the other value added tax shares and likewise opened on the whole price.

28.5.2 Forwarding expenses with orders

With the order process the valid forwarding expenses and all accompanying information are determined and saved with the order. Then within the Shop Module the due forwarding expenses are indicated and added for the whole price. In addition, these postage costs can be edited afterwards, in addition one simply clicks the postage costs and then can edit the postage relevant data for this order.

Figure 376 Change shipping cost in order



Note: Tag from Version 3.5: `<we:shipping>`: With `we:shipping` tag the forwarding expenses entered in the Shop Module can be accessed. With the help of the order value and the origin land of the logged in customer the suitable forwarding expenses are determined and returned. Besides, the imperative parameter `sum = ""` passes the name `we:sum` which contains the goods value of the order. The result from `we:shipping` can be processed in the Template and be added, e.g., with `we:calculate` tag to the shopping cart.

29 Linking to a payment provider

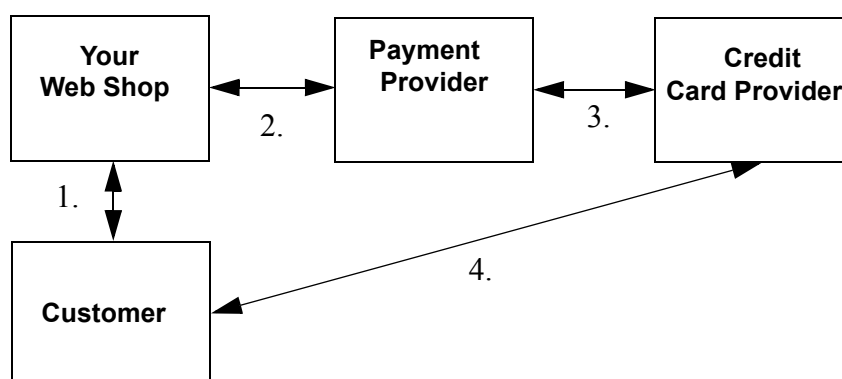
The following chapter discussed some guidelines that you can use for linking your Web site to a payment provider.

Note: Every payment provider has its own interface and requirements for the transfer of payment data. For this reason, webEdition does not provide an interface for payment providers.

29.1 Payment provider transaction model

Figure 377 shows a typical transaction arrangement.

Figure 377 On-line shop transactions



By way of example, we have described two possible ways to link your shop to a payment provider.

- transfer the total price
- transmit every item individually

29.2 Integrating PayPal

The settings dialogue for PayPal can be accessed with *Edit> Payment Provider*, the Quickstart button of the same name or the Payment provider button. The Payment provider window is opened.

Figure 378 Payment Provider settings: PayPal
Figure 379 Form for personal entries

To be able to form comfortably a payment winding up with PayPal, some personal data are required. Address entries also belong to it. Those data which are available in this dialog about the select boxes (These data are administered in the customer management) and are selected, must be taken into consideration with the creation of a shop form for the purpose of the registration with personal data. If you select, e.g., for the transmission of the given name the option Forename in the selectbox, this must be also taken into consideration in the source program of the form in the shop with the field according to given name.

For the form, the following XHTML code

was used:

```
<we:form id="self" pass_id="customerData" name="userform">
<we:sessionField name="ID" type="hidden" />
<we:sessionField name="UserGroup" type="hidden"
value="webCustomer" />
<we:sessionField name="Username" type="hidden" autofill="true" />
<we:sessionField name="Password" type="hidden" autofill="true" />
<fieldset>
<legend> Billing address</legend>
<p>
<label for="s[Salutation_Salutation]"> Salutation: </label>
<we:sessionField name="Salutation_Salutation" type="textinput"
class="select" choice="on" options="Mr,Mrs"
id="s[Salutation_Salutation]" />
</p>
<p>
<label for="s[Forename]"> Forename*: </label>
<we:sessionField name="Forename" type="textinput" class="inputs"
id="s[Forename]" />
</p>
```

```

    <p>
    <label for="s[Surname]"> Surname*: </label>
    <we:sessionField name="Surname" type="textinput" class="inputs"
    id="s[Surname]" />
    </p>
    <p>
    <label for="s[Contact_Company]"> Company: </label>
    <we:sessionField name="Contact_Company" type="textinput"
    class="inputs" id="s[Contact_Company]" />
    </p>
    <p>
    <label for="s[ustid]"> UST.-ID: </label>
    <we:sessionField name="ustid" type="textinput" class="inputs"
    id="s[ustid]" />
    </p>
    <p>
    <label for="s[Contact_Address1]"> Street*: </label>
    <we:sessionField name="Contact_Address1" type="textinput"
    class="inputs" id="s[Contact_Address1]" />
    </p>
    <p>
    <label for="s[Contact_Zip]"> Zip-Code*: </label>
    <we:sessionField name="Contact_Zip" type="textinput" class="zip"
    id="s[Contact_Zip]" />
    </p>
    <p>
    <label for="s[Contact_Address2]"> City*: </label>
    <we:sessionField name="Contact_Address2" type="textinput"
    class="inputs" id="s[Contact_Address2]" />
    </p>
    <p>
    <label for="s[Contact_Country]"> Country: </label>
    <we:sessionField name="Contact_Country" type="select"
    class="select"
    values="Deutschland,Schweiz,Österreich,Frankreich,Anderes"
    id="s[Contact_Country]" />
    </p>
    <p>
    <label for="s[Contact_Email]"> Email: </label>
    <we:sessionField name="Contact_Email" type="textinput"
    class="inputs" id="s[Contact_Email]" />
    </p>
    <p>
    <label for="s[Contact_Tell]"> Phone: </label>
    <we:sessionField name="Contact_Tell" type="textinput"
    class="inputs" id="s[Contact_Tell]" />
    </p>
    <p>
    <label for="s[Attention]">Attention by?:</label>
    <we:sessionField name="Attention" type="textinput" choice="true"
    options="Bitte auswählen,Zeitschrift,Empfehlung eines
    Bekannten,Empfehlung auf einer Website,Sonstiges" id="s[Attention]"
    />
    </p>
    <p>
    <label for="s[Exacting]"> How exactly?: </label>
    <we:sessionField name="Exacting" type="textinput" class="inputs"
    id="s[Exacting]" />

```

```
</p>
<p>
<label>&nbsp;</label>
<input type="submit" class="inputButton" name="order"
value="Weiter" />
</p>
<p>
(*) Mandatory fields
</p>
</fieldset>
</we:form>
```

A correct entry leads to the fact that everything, also personal data, are validated and transmitted to PayPal.

PayPal needs exactly 2 entries for the correct payment winding up. This are the PayPal business address (email) as well as the ISO-country code for the correct winding up of the payment with regard to accordingly correct currency and tax. By means of a selectbox the suitable ISO-Country code is selected and the business address is given what is actually the PayPal email address. Optional you may choose in another Selectbox between the PayPal shop (live shop) and the PayPal sand box (PayPal integrated developing environment for testing). Further information about the sand box can be found in the PayPal documentation.

29.3 Using PayPal on the Website

For the data transmission to PayPal the PayPal tag can be used, if the necessary data has been entered in the backend. First of all there should be, e.g., a PayPal Buy Now button which links on a special PayPal page. This should be placed within the data-transmitting form.

Figure 380 PayPal Buy Now Button (german example)

Bitte kontrollieren Sie nochmals die unten angegebenen Daten. Sind die Angaben korrekt können Sie mit der Bestellung fortfahren. Falls einige Daten nicht übereinstimmen, korrigieren Sie diese bitte.

Daten korrigieren

Geniessen Sie die Vorteile eines registrierten Benutzers und registrieren Sie sich noch heute.

Registrierung

Ist alles korrekt? Schliessen sie ihre Bestellung ab und wählen Sie noch die Zahlungsmethode aus.

Bestellen **PayPal BUY NOW** Mit saferpay

the corresponding XHTML source code:

```
<we:a id="113"></we:a>
```

In this example the id 113 refers to the document paypal.php.

In this file merely the paypal tag will be interpreted called with the names for the shop as well as price and whether the price as Net and tax should be used. More information about this tag can be found in the description of the `<we:paypal>` tag.

The source code of the file paypal.php resp. paypal.tmpl:

```
<we:sessionStart /><we:createShop shopname="demoshop"
/><we:addDelShopItem shopname="demoshop" /><!DOCTYPE HTML PUBLIC
"-//W3C//DTD HTML 4.01 Transitional//EN">
<html>
<head>
  <we:title></we:title>
  <we:description/>
  <we:keywords/>
  <we:charset defined="ISO-8859-1">ISO-8859-1</we:charset>
  <we:css id="10" />
</head>
<body>
<div class="content">
  <div class="header">
    <we:include id="46" />
  </div>
  <div class="leftNavigation">
    <we:include id="11" />
    <we:include id="3" />
  </div>
  <div class="mainContent">

    <div class="fullWidth">
      <div class="contentFirstDiv">
        <h1>Pay Pal</h1>
        <h2>powered by webEdition</h2>
        <div class="divWithPadding">
          Der Text sollte noch geschrieben werden.
        </div>
      </div>
    </div>

    <div class="fullWidth">
      <div class="border">
        <div class="divWithPadding">
          <we:paypal shopname="demoshop" pricename="price" netprices="true"
usevat="true" />
        </div>
      </div>
    </div>

  </div>
</div>
<we:ifVar name="action" match="success" type="request">
<we:deleteShop shopname="demoshop" />
</we:ifVar>
</body>
</html>
```

29.4 Integrating Saferpay

The settings dialogue for Saferpay can be accessed with *Edit> Payment Provider*, the Quickstart button of the same name or the Payment provider button. The Payment provider window is opened.

Figure 381 Payment Provider settings: Saferpay

- *Language*: Saferpay accepts the language variations specified here. With this setting you can influence the appearance of the Saferpay terminal.
- *Account-ID*: In this field must be deposited the supplied Account-ID by saferpay.
- *Shop Owner*: The email address deposited in this field is used by Saferpay as a Notify email. Message is dispatched to this email in case of an order.
- *allow collect?*: Here can be selected whether Saferpay should permit the collecting of several orders before the realization of the order process with the total sum. Standard is a no.
- *additional. Form?*: Here can be selected whether Saferpay should generate an additional form to the registration of an address of delivery during the realization of the order process in the terminal. Standard is a no
- *Providerset*: A comma-separated list, consisting of Provider-IDs to limit the Card types to be used. To find out the suitable Provider-ID, please rightclick in the Saferpay select terminal (VT) on the suitable Card logo and select "Properties". Precise information can be gathered from the saferpay documentation.
- *exec-path*: Path to executable command line of saferpay
- *conf-path*: Path to the configuration files of saferpay, e.g., the directory "saferpay" in the root directory of the web server.
- *Description*: A description of the offer which should appear in the Saferpay terminal (VT).

Further informations about Saferpay and its configuration can be found in the Saferpay documentation.

29.5 Using Saferpay on your website


First of all, create a Saferpay button which links on a special Saferpay page. This should be placed within the data-transmitting form.

Figure 382 Saferpay Button in Form (german example)

Bitte kontrollieren Sie nochmals die unten angegebenen Daten. Sind die Angaben korrekt können Sie mit der Bestellung fortfahren. Falls einige Daten nicht übereinstimmen, korrigieren Sie diese bitte.

Geniessen Sie die Vorteile eines registrierten Benutzers und registrieren Sie sich noch heute.

Ist alles korrekt? Schliessen sie ihre Bestellung ab und wählen Sie noch die Zahlungsmethode aus.



The code:

```
<we:a class="inputButton" id="123"> With saferpay </we:a>
```

In this example the id 123 refers to the document `saferpay.php`. In this file merely the `saferpay` tag will be interpreted after the implementing of the *OpenSaferpayScript* file called with the names for the shop as well as price and whether the price as Net and tax should be used. In addition, in the tag the IDs of the sequence pages (in each case for onsuccess, onfailure or onabortion) can be defined. Further} information on the `<we:saferpay>` tag can be found in the tag-reference.

The code for `saferpay.php` resp. `saferpay.tmpl`:

```
<we:sessionStart /><we:createShop shopname="demoshop"
/><we:addDelShopItem shopname="demoshop" /><!DOCTYPE HTML PUBLIC
"-//W3C//DTD HTML 4.01 Transitional//EN">
<html>
<head>
  <we:title></we:title>
  <we:description/>
  <we:keywords/>
  <we:charset defined="ISO-8859-1">ISO-8859-1</we:charset>
  <we:css id="10" />
</head>
<body>
<div class="content">
  <div class="header">
    <we:include id="46" />
```

```
</div>
<div class="leftNavigation">
  <we:include id="11" />
  <we:include id="3" />
</div>
<div class="mainContent">

  <div class="fullWidth">
    <div class="contentFirstDiv">
      <h1>saferpay</h1>
      <h2>powered by webEdition</h2>
      <div class="divWithPadding">
        Der Text sollte noch geschrieben werden.
      </div>
    </div>
  </div>

  <div class="fullWidth">
    <div class="border">
      <div class="divWithPadding">
&ltscript
src="http://www.saferpay.com/OpenSaferpayScript.js"></script>
<we:saferpay shopname="demoshop" pricename="price"
netprices="true" usevat="true" onsuccess="125" onfailure="126"
onabortion="127" />
      </div>
    </div>
  </div>

</div>
</div>
<we:ifVar name="action" match="success" type="request">
<we:deleteShop shopname="demoshop" />
</we:ifVar>
</body>
</html>
```

29.6 New or extended tags in version 3.5

For Version 3.5 of webEdition, new tags have been added as well as existing tags extended to better support the improved shop functions.

29.6.1 we:paypal

With `<we:paypal>` module built in PayPal variables from the shop can be accessed, like business address (shop email), country password (Country code ISO) as well as on the setting whether a test account or live shop should be used. In addition, the settings used in a form and in PayPal for transmitting personal data are set. The mandatory parameter `shopname = ""` passes the name of the current shop, `pricename = ""` passes the name of the current prize field. `netprice = ""` determines whether the prices are Net or Gross (TRUE or FALSE) and `usevat = ""` investigates whether a value added tax should be used, or not (TRUE or FALSE).

29.6.2 we:saferpay

With `<we:saferpay>` you can access the Saferpay variables entered in the shop module (see Section 29.4). The settings used in a form and for transmitting personal data to saferpay are also set. The mandatory parameter `shopname = ""` passes the name of the current shop, `pricename = ""` passes the name of the current prize field. `netprice = ""` determines whether the prices are Net or Gross (TRUE or FALSE) and `usevat = ""` investigates whether a value added tax should be used, or not (TRUE or FALSE). `onsuccess = ""` links on the ID of the web edition-page in case of a successful order.

onfailure = "" links on the ID of the web edition-page in case of a not successful order if an error should have appeared. onabortion = "" links on the ID of the web edition-page in case of an abnormal termination of the order.

29.6.3 we:sessionField /addition: autofill=true

This tag was extended with the attribute "autofill". This attribute will come handy especially while implementing a form. If a `<we:sessionField>` is provided with the addition `autofill=true`, a Script is called in the background which autofills a variable with a value. When using this addition, e.g., within an input field to the entry of an username and/or password, webEdition automatically generates a value and needs and e.g., the user no longer has to log in to be able to order in the shop. The XHTML code for such a form could look like this:

```
<we:form id="self" pass_id="customerData" name="userform">
<we:sessionField name="ID" type="hidden" />
<we:sessionField name="UserGroup" type="hidden"
value="webCustomer" />
<we:sessionField name="Username" type="hidden" autofill="true" />
<we:sessionField name="Password" type="hidden" autofill="true" />
  <fieldset>
    <legend> Rechnungsadresse </legend>
    <p>
      <label for="s[Salutation_Salutation]"> Anrede: </label>
      <we:sessionField name="Salutation_Salutation" type="textinput"
class="select" choice="on" options="Herr,Frau"
id="s[Salutation_Salutation]" />
    </p>
    <p>
      <label for="s[Forename]"> Vorname*: </label>
      <we:sessionField name="Forename" type="textinput" class="inputs"
id="s[Forename]" />
    </p>
    <p>
      <label for="s[Surname]"> Nachname*: </label>
      <we:sessionField name="Surname" type="textinput" class="inputs"
id="s[Surname]" />
    </p>
    <p>
      <label for="s[Contact_Company]"> Firma: </label>
      <we:sessionField name="Contact_Company" type="textinput"
class="inputs" id="s[Contact_Company]" />
    </p>
    <p>
      <label for="s[ustid]"> UST.-ID: </label>
      <we:sessionField name="ustid" type="textinput" class="inputs"
id="s[ustid]" />
    </p>
    <p>
      <label for="s[Contact_Address1]"> Strasse*: </label>
      <we:sessionField name="Contact_Address1" type="textinput"
class="inputs" id="s[Contact_Address1]" />
    </p>
    <p>
      <label for="s[Contact_Zip]"> PLZ*: </label>
      <we:sessionField name="Contact_Zip" type="textinput" class="zip"
id="s[Contact_Zip]" />
    </p>
    <p>
      <label for="s[Contact_Address2]"> Ort*: </label>
      <we:sessionField name="Contact_Address2" type="textinput"
class="inputs" id="s[Contact_Address2]" />
    </p>
    <p>
      <label for="s[Contact_Country]"> Land: </label>
```

```
<we:sessionField name="Contact_Country" type="select"
class="select"
values="Deutschland,Schweiz,Österreich,Frankreich,Anderes"
id="s[Contact_Country]" />
</p>
<p>
<label for="s[Contact_Email]"> Email: </label>
<we:sessionField name="Contact_Email" type="textinput"
class="inputs" id="s[Contact_Email]" />
</p>
<p>
<label for="s[Contact_Tell]"> Telefon: </label>
<we:sessionField name="Contact_Tell" type="textinput"
class="inputs" id="s[Contact_Tell]" />
</p>
<p>
<label for="s[Attention]">Aufmerksam durch?:</label>
<we:sessionField name="Attention" type="textinput" choice="true"
options="Bitte auswählen,Zeitschrift,Empfehlung eines
Bekannten,Empfehlung auf einer Website,Sonstiges" id="s[Attention]"
/>
</p>
<p>
<label for="s[Exacting]"> Wodurch genau?: </label>
<we:sessionField name="Exacting" type="textinput" class="inputs"
id="s[Exacting]" />
</p>
<p>
<label>&nbsp;</label>
<input type="submit" class="inputButton" name="order"
value="Weiter" />
</p>
<p>
(*) Pflichtfelder
</p>
</fieldset>
</we:form>
```

30 Designing a template for the Shop Module

This chapter shows you how to use `we:tags` to create templates for your on-line shop. The following functions are described in this chapter:

- Section 30.1, "Creating a detailed view of an item" on page 30-345
- Section 30.2, "Creating item summaries" on page 30-346
- Section 30.3, "Ordering items" on page 30-346
- Section 30.4, "Making a shopping cart" on page 30-347
- Section 30.5, "Special function of the `<we:a>` tag in the Shop Module" on page 30-348
- Section 30.6, "Special functions of the `<we:form>` tag in the Shop Module" on page 30-348
- Section 30.7, "Performing calculations" on page 30-349

30.1 Creating a detailed view of an item

The process of creating a template for an item summary is performed in a similar fashion to other webEdition functions (see "Creating Templates" in the *webEdition User Manual*). You can use any design for the detail page of an item. The only exceptions are the following `we:tags`, which must be on a Shop Detail page as there are fields in the Shop Module that correspond to these fields:

- A `<we:input>` or `<we:textarea>` with the name "shoptitle"
- A `<we:input>` or `<we:textarea>` with the name "shopdescription"
- A `<we:input>` with the price of the product. The name of this entry field is up to you, but it is very important because this field name must be provided later on as a price variable together with the `<we:writeshopdata>` tag.

Note 1: Important! The article category has to be named with a starting *shop*. The category can also be named like *shop_1*, *shop_new*, *shop_online* or the likes. Else, no articles can be installed in the shop.

Note 2: The price variable has no fixed name, since you can also work with various prices. The price written to the database is the one provided in the *pricename* variable in the `<we:writeShopData>` tag.

Note: Please also note that all detailed views of items must be assigned as a uniform document type and/or a uniform category, since item summaries are generated with webEdition's listview function. Ideally you will have a uniform document type (e.g. shop_article or the like) for all detailed views in your Shop, and will distinguish between the item groups according to various categories (shop_article_dvd, shop_article_cd, etc.), so that they generate both a general summary of all items (only via document types) and summaries of all item groups (document types and categories).

30.2 Creating item summaries

The summaries of items or item groups are generated as normal listviews. In the following code example, assume that you have named a document type "shop", and that there are two item groups, "shop_dvd" and "shop_cd":

"shop_dvd" sample item group summary:

```
<we:listview rows="6" doctype="shop" categories="shop_dvd">
  <table border="0" cellpadding="0" cellspacing="0" width="500">
    <we:repeat>
      <tr>
        <td class="normal">
          <b><we:field name="shoptitle" alt="we_path"
hyperlink="on"/></b><br>
          <we:field name="shopdescription" alt="we_text" max="200"/><br>
          Price: <we:field name="prize"> Euro <we:a
id="id_des_shopping_cartes"
shop="on">[In den Shopping_cart]</we:a>
        </td>
      </tr>
      <tr>
        <td></td>
      </tr>
    </we:repeat>
  </table>
</we:listview>
```

All items:

```
<we:listview rows="6" doctype="shop">
```

30.3 Ordering items

In order to allow an on-line shopper to put an item into the shopping cart, the following function must be available in the detailed item view or the summary:

```
<we:a id="id_of_the_following_page" shop="on">[Order]</we:a>
```

The shop attribute was added to the <we:a> tag. This function transfers the item information into the shopping cart. This is only possible if the following we:tags are on the page specified in the id attribute of the <we:a> tag:

```
<we:createShop shopname="shopname"/><we:addShopitem
shopname="shopname"/>
```

Only when this function is called up will the item be added to the order or put into the shopping cart. It is essential that you ensure that every order request with the <we:a> tag and the shop="on" attribute is followed by a page with <we:createShop/> and <we:addShopItem/> tags. The next page can be any page (even the calling page itself). Ideally it is the shopping cart which immediately displays the ordered item. If it is not

the shopping cart, the ordered item is saved and displayed the next time the shopping cart is called.

30.4 Making a shopping cart

In order to make a shopping cart for your Web site, you must use a webEdition list with the following we:tag:

```
<we:repeatShopItem
shopname="shopname">.....</we:repeatShopItem>
```

Below is an extended example:

```
<we:createShop shopname="shoppers"/><we:addDelShopItem
shopname="shoppers"/>
<!--Begin header -->
<table width="100%" border="0">
<tr bgcolor="silver">
<td>Item</td>
<td width="50">Number</td>
<td>Price</td>
<td>Total price</td>
</tr>
<!-- End header -->
<!-- Begin article listing -->
<we:repeatShopItem shopname="shoppers">
<tr>
<td class="normal" bgcolor="white"><table
border="0"><tr><td><we:field
name="Bild" type="img" hyperlink="on" border="0" height="30"
width="30"
align="top"/>
</td><td><b><we:field name="Title" alt="we_path"
hyperlink="on"/></b><br><we:field name="Description" alt="we_text"
max="200"/></td>
</tr>
</table>
<!-- Begin possible orders -->
<td align="center"><we:showShopItemNumber
shopname="shoppers"/><br>[
<we:a id="148" shop="on" amount="1">+1</we:a>
|<we:a id="148" shop="on" amount="-1">-1</we:a>]</td>
<td align="right">EURO <we:calculate
sum="waren"><we:showShopItemNumber
shopname="shoppers">*<we:field name="Price"/></we:calculate></td>
</td>
<!-- End possible orders -->
</tr>
</we:repeatShopitem>
<!--End article listing -->
<tr><td colspan="4"></td></tr>
<tr bgcolor="silver"><td colspan="3">total:</td><td align="right">
EURO <we:sum name="waren"/>
</td></tr>
</table>
```

The amount attribute is a further enhancement of the <we:a> tag. Here we are using it in the form:

```
<we:a id="148" shop="on" amount="5">+five</we:a>
```

The ID listed in the next page is the same as the calling page in this example. The shop attribute specifies that this is a Shop function. The amount attribute provides a link that increases the item number (we:shopItemNumber) by five. Another way to allow

shoppers to change the item quantity is by including select boxes, as shown in the following example:

```
<!-- Begin possible orders -->
<td align="center"><we:showShopItemNumber shopname="shoppers"/>
<we:form id="id_der_folgesseite" type="shopliste">
<td width="30" class="nav0" bgcolor="white">
    <select name="shop_anzahl" size="1" class="nav0">
        <option value="1">1</option>
        <option value="2">2</option>
        <option value="3">3</option>
        <option value="4">4</option>
        <option value="5">5</option>
        <option value="6">6</option>
        <option value="7">7</option>
        <option value="8">8</option>
        <option value="9">9</option>
        <option value="10">10</option>
    </select></td>
</we:form>
<!-- End possible orders -->
```

30.5 Special function of the <we:a> tag in the Shop Module

Within an item list in the Shop, the <we:a> tag takes on three new attributes:

- shop= "shows the tag that it is in a Shop"
- amount= "Number of items that are put into the shopping cart by clicking on the link created by the we:a tag"
- delarticle= "takes the corresponding item out of the shopping cart again"

The following code puts the corresponding item into the shopping cart:

```
<we:a id="id_der_folgesseite" shop="on" amount="1">Into the shopping
cart</we:a>
```

The following code takes the item out of the shopping cart again:

```
<we:a id="id_der_folgesseite" delarticle="on">Out of the shopping
cart</we:a>
```

The following code creates a link to delete the complete shopping cart:

```
<we:a id="id_der_folgesseite" delshop="on">Delete shopping
cart</we:a>
```

30.6 Special functions of the <we:form> tag in the Shop Module

The we:form tag has one additional attribute in the Shop Module:

```
type="shopliste"
```

This attribute lets you use entry fields or select boxes to provide the number of items for ordering. In the <we:form> tag, id="self" can be omitted as omitting information in the id attribute always signifies a link to itself. When it is linked to another page, id="id_of_next_page" must always be included. For example:

```
<!--Begin possible orders -->
<td align="center"><we:showShopItemNumber shopname="shoppers"/>
<we:form id="id_der_folgesseite" type="shopliste">
<input type="Text" name="shop_anzahl">
<input type="submit" value="abschicken">
</we:form>
<td align="right">EURO <we:calculate
sum="waren"><we:showShopItemNumber
```

```
shopname="shoppers">*<we:field name="Price"/></we:calculate></td>
</td>
<!-- End possible orders -->
```

30.7 Performing calculations

webEdition allows you to perform extensive calculations with the `<we:calculate>` and `<we:sum>` we:tags.

`<we:calculate>` offers you all functions that PHP generally offers:

- + Addition
- - Subtraction
- * Multiplication
- / Division
- () Nested calculations
- sqrt Square root

`<we:sum name="your_sum">` adds all individual totals that are defined in the `<we:calculate sum="your_sum">` tag.

The following is an example for `<we:calculate>`:

```
<we:calculate name="endpreis" num_format="german" print="on">
(<we:session
field name="artikel_summe"/>*(1-<we:field
name="rabattstufel"/>))*(1+(<we:field
name="mwst"/>/100))</we:calculate>
```

The following is a full example showing the use of `<we:calculate>` and `<we:sum>`:

```
<we:createShop shopname="shoppers"/><we:addDelShopItem
shopname="shoppers"/>
<table width="100%" border="0">
<tr bgcolor="silver">
<td>Item</td>
<td width="50">Number</td>
<td>Price</td>
<td>Total price</td>
</tr>
<we:repeatShopItem shopname="shoppers">
<tr>
<td class="normal" bgcolor="white"><table
border="0"><tr><td><we:field
name="Bild" type="img" hyperlink="on" border="0" height="30"
width="30"
align="top"/>
</td><td><b><we:field name="Artikelname" alt="we_path"
hyperlink="on"/></b><br><we:field name="Description" alt="we_text"
max="200"/></td>
</tr>
</table>
<td align="center"><we:showShopItemNumber
shopname="shoppers"/><br>[ <we:a
id="148" shop="on" Number="1">+1</we:a> | <we:a id="148" shop="on"
Number="-
1">-1</we:a> ]</td>
<td><we:field name="Price"/></td>
<td align="right">EURO
<we:calculate sum="warenkorb"
num_format="german"><we:showShopitemNumber
```

```
shopname="shoppers">* <we:field name="Price"/></we:calculate></td>
</td>
</tr>
</we:repeatShopitem>
<tr><td colspan="4"></td></tr>
<tr bgcolor="silver"><td colspan="3">total:</td><td align="right">
Euro <we:sum name="warenkorb" num_format="german"/>
</td></tr>
</table>
```

The code cited above produces the following output on a browser (see Figure 383):

Figure 383 Output to browser

31 Task/Messaging: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Task/Messaging Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Task/Messaging Module. These topics are treated in the following sections:

- Section 31.1, "What is the webEdition Task/Messaging Module?" on page 351
- Section 31.2, "Installation" on page 352
- Section 31.3, "General information and navigation" on page 352

31.1 What is the webEdition Task/Messaging Module?

webEdition offers not only the means of creating Web site content, but it also offers a working context in which you can administer the activities of your Web development team.

The webEdition Task/Messaging Module is a customized E-mail system in which you can send messages and administer tasks relating to Web page creation and administration.

All messages and tasks related to the development of your Web page content can be "contained" within this dedicated system. All tasks performed by users in webEdition can be administered and communicated without an external E-mail system or process. Your communiqués pertaining to development tasks are thus separated from your larger enterprise E-mail systems, making your process easier to monitor and administer.

Typically, the editor-in-chief (or person in charge of your Web page administration), uses this module to communicate work items to Web content developers. Developers, in turn, can use the tool to communicate among themselves, and to report on the status of defined tasks.

There are two types of communiqués that you can create using the Task/Messaging Module:

- Message communiqué.

A webEdition message is similar to a simple E-mail message. You can send messages to any user registered in the User Management Module of webEdition.

You can also send E-mail messages to external recipients. In this case, you employ the normal E-mail address syntax (for example, `username@web_address.com`).

- Task communiqué

A task communiqué instructs a webEdition user to conduct a specified task within webEdition. There are two ways to create a task communiqué in webEdition:

- Manual task creation. You can create a task manually that you can send to other users.
- Automatic task creation. If you install the webEdition Workflow Module, tasks can be generated automatically as soon as documents or objects are inserted in the workflow. Once a workflow has been defined, all functions of the workflow are administered automatically by the system. For more information on the Workflow Module, consult *The Workflow Module User Guide* which is available on our documentation page the following URL:
<http://www.webedition.de/english/downloads/Documentation.html>.

31.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

31.3 General information and navigation

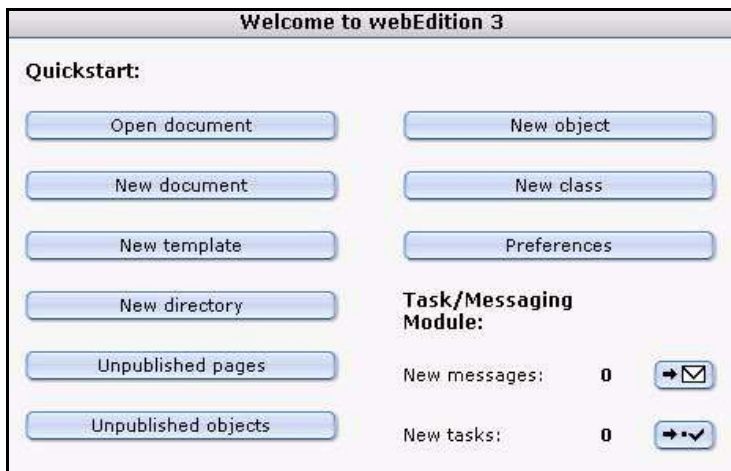
After you have installed the Task/Messaging Module, you will find a new menu item in the main menu called *Modules*, which contains all the modules in your installation of webEdition. *Task/Messaging* will appear as an option in the *Modules* drop-down menu (see Figure 384).

Figure 384 Modules drop-down menu

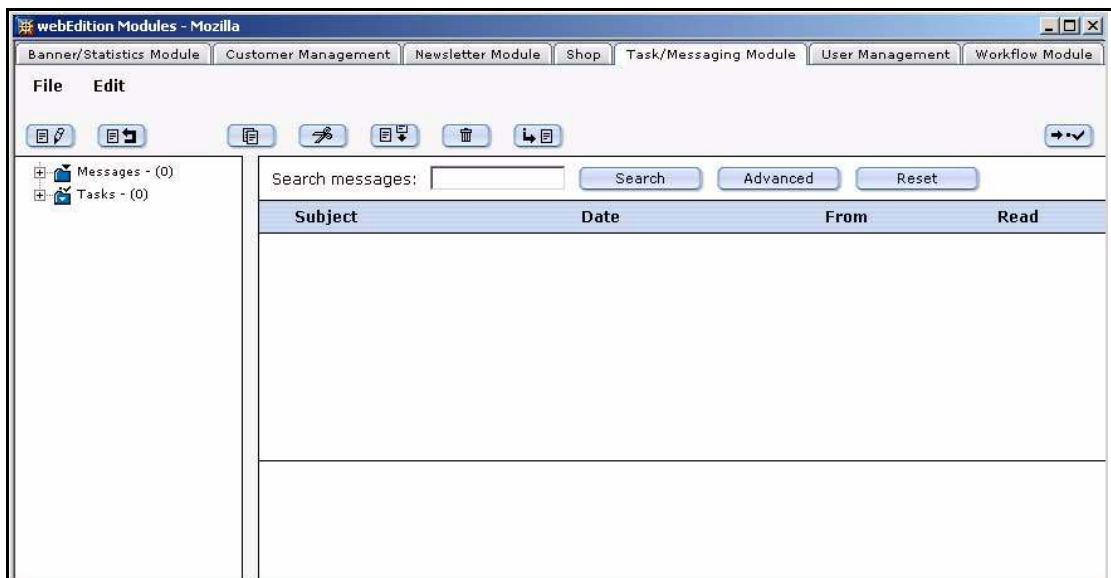


Modules	Help
Banner/Statistics Module...	
Customer Management...	
Database/Object Module...	
Newsletter Module...	
Scheduler...	
Shop...	
Task/Messaging Module...	
User Management...	
Workflow Module...	
Editor Plug-in...	
Module Installation...	

To open the module, you can click on *Task/Messaging* in the *Modules* menu, or you can go directly to create a new task or message by clicking on one of the icons that appears in the webEdition *Quickstart* menu (see Figure 385).

Figure 385 webEdition Quickstart menu

Click on *Task/Messaging* in the Modules menu. The Task/Messaging Module main screen appears (see Figure 386).

Figure 386 Task/Messaging Module main screen

31.3.1 Navigation: toggling between the tasks and messaging systems

The Task/Messaging Module is divided in two parts: tasks and messaging. There is one main screen for each system.

You can toggle between the main messaging screen and the main task screen by clicking on the "launch" button in the upper right corner of each screens.

When you are in the main task screen, a button in the form of an envelope icon appears in the upper right corner of the main task screen. If you click on this button, your view will switch to the main messaging screen (see Figure 387).

Figure 387 "Launch Messaging System" button

Conversely, when you are in the main messaging screen, a button in the form of a check mark icon appears in the upper right corner of the main messaging screen. If you click on this button, your view will switch to the main task screen (see Figure 388).

Figure 388 "Launch Task System" button



31.3.2 The Task/Messaging *File* menu

The *File* drop-down menu has the following items (see Figure 389, "Task/Messaging File menu" on page 354).

- *New*. You can select from the following sub-items:
 - *New > Message*. Use this command to create a new message.
 - *New > Task*. Use this command to create a new task.
 - *New > Folder*. Use this command to create a new folder.
- *Delete*. Select *Delete > Folder* to delete a folder.
- *Close*. This command closes the application

Figure 389 Task/Messaging *File* menu



31.3.3 The Task/Messaging *Edit* menu

The *Edit* drop-down menu has the following items (see Figure 390, "Task/Messaging Edit menu" on page 354):

- *Folder*. Use this item to edit or change the folder settings.
- *Settings*. Use this item to instruct the system to search for new messages on the server at defined time intervals.
- *Copy, Cut, Paste*. Use these commands to copy, cut and paste an item.

Figure 390 Task/Messaging *Edit* menu



31.3.4 Changing folder settings

By clicking *Edit > Folder*, the module opens a screen allowing you to change the parameters of the folder (see Figure 391).

Figure 391 *Change folder settings* screen

 A dialog box titled "Change folder settings" with a light purple background. It contains three fields: "Folder name" with a text input box, "Parent folder" with a dropdown menu showing "Task", and "Type" with a dropdown menu showing "webEdition Message". At the bottom right are "Save" and "Cancel" buttons.

Using the *Change folder settings* screen, you can perform the following operations:

- change the name of the folder, using the *Folder name* field
- assign a file to a new directory, using the *Parent folder* select box
- change the type of communiqué (either message or task) using the *Type* select box

31.3.5 Changing the update interval

By clicking *Edit > Settings*, the module opens a screen allowing you to change the parameters governing the automatic update interval. With this feature, by making a selection from the *Check step* select box, you can instruct the system to search for new messages on the server at defined time intervals (see Figure 392).

Figure 392 *Settings: update interval* screen

 A dialog box titled "Settings - Mozilla" with a "Settings" sub-header. It contains a "Check step" field with a dropdown menu showing "10" and the text "Minute(s)". At the bottom are "Save" and "Cancel" buttons.

31.4 Function buttons

The webEdition Task/Messaging Module provides graphical buttons that you can use to perform actions. Both types of communiqués, that is, messages and tasks, have distinctive buttons.

Note: For further information on toggling between the messaging and tasks modules, see Section 31.3.1, "Navigation: toggling between the tasks and messaging systems" on page 353.

31.4.1 Messages buttons

Go to the messaging main screen. When the message function is active, the following buttons appear (see Figure 393).

Figure 393 Messaging buttons

The following sub-sections describe each of the messaging buttons.

31.4.1.1 The *Create message* button

Click the button shown in Figure 394, to create a message.

Figure 394 *Create message* button

31.4.1.2 The *Reply to message* button

After opening a message, you can reply directly to the sender by clicking on the "reply to message" button (see Figure 395). The system automatically enters the address of the original sender into the to field of your reply message.

Figure 395 *Reply to message* button

31.4.1.3 The *Copy message* button

Select this button to copy a messages you have marked to another directory (see Figure 396).

Figure 396 *Copy message* button

31.4.1.4 The *Cut message* button

Select the button shown in Figure 397, to cut selected messages. Thereafter you can paste the message into another file.

Figure 397 *Cut message* button

31.4.1.5 The *Paste message* button

Use the button shown in Figure 398, to insert copied or cut messages into another file.

Figure 398 *Paste message* button

31.4.1.6 The *Delete message* button

Select the button shown in Figure 399, to delete all marked messages.

Figure 399 *Delete message* button

31.4.1.7 The *Look for new messages* button

When you click on this button, the server will search for new messages (see Figure 400).

Figure 400 *Look for new messages* button

31.4.2 Task buttons

Like the messaging system, the task system has a group of buttons designed to help you perform basic functions within the Task/Messaging Module. Some of the task buttons have the same icon and function as those used in the messaging main screen. See Section 31.4.1.3, "The Copy message button" on page 356 through to Section 31.4.1.6, "The Delete message button" on page 356. The remaining task buttons are treated in the sub-sections that follow.

Activate the task main screen. Once the task function is active, the following task buttons appear (see Figure 401):

Figure 401 Task buttons

31.4.2.1 The *Create task* button

Click the button shown in Figure 402, to create a new task.

Figure 402 *Create task* button

31.4.2.2 The *Forward task* button

Click the button shown in Figure 403, to forward a task to another individual on your Web development team.

Figure 403 *Forward task* button

31.4.2.3 The *Reject task* button

Click the button shown in Figure 404, to reject a task that has been sent to you. The task communiqué will be returned to the sender.

Figure 404 *Reject task* button

31.4.2.4 The Task *Update status* button

Select this button to check whether or not the status of a task has changed (see Figure 405).

Figure 405 Task *Update status* button

31.5 The explorer menu

The explorer menu appears on the left side of the Task/Messaging main screen. The explorer menu offers a visual representation of the directories (folders) and files contained in the Task/Messaging Module (see Figure 406).

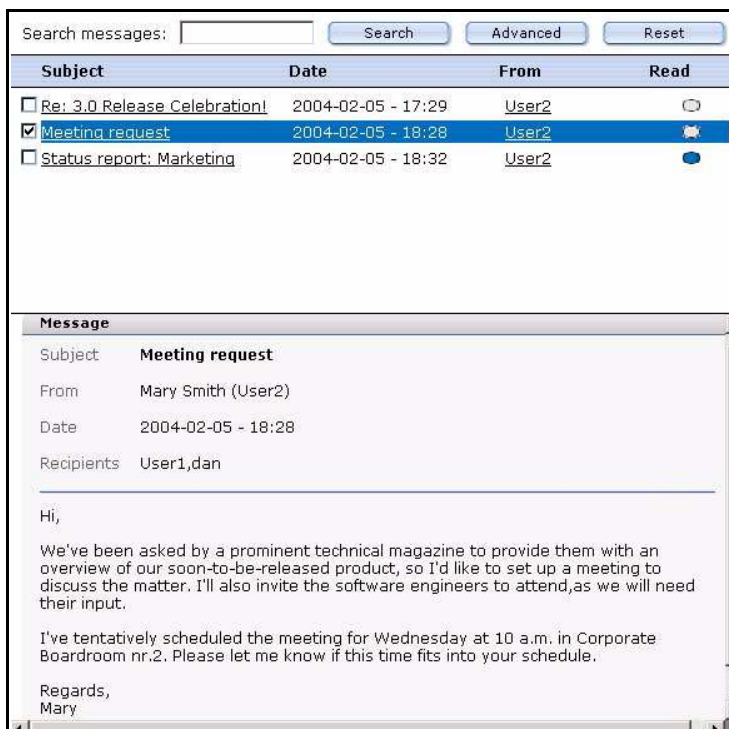
Figure 406 Task/Messaging explorer menu

To open a folder, click the plus "+" sign on the left side of the folder. The folder symbol changes to "open", and the contents of the directory appears. Below the open folder are the files saved in the directory. Underneath the directory task, you find the sub directories.

31.6 The edit views of the Task/Messaging Module

There are three areas in the messaging and task edit views (see Figure 407, "The edit screen (messaging module)" on page 358).

- The upper area allows you to search for messages
- The middle area provides a list of your messages or tasks
- The lower area shows the content of a marked message or task

Figure 407 The edit screen (messaging module)

31.6.1 Edit view: Search tasks/messages area

To search for a specific task or message, type a word in the search field, then click the *Search* button. The system searches the current directory for the word you have typed in the search field (see Figure 408).

Figure 408 Searching for a task/message

Search messages: <input type="text" value="report"/>				<input type="button" value="Search"/>	<input type="button" value="Advanced"/>	<input type="button" value="Reset"/>
Subject	Date ▼	From	Read			
<input type="checkbox"/> Status report: Marketing	2004-02-05 - 18:32	User2				

By clicking the *Advanced* button, you can extend the search area to other directories, or you can limit your search to parts of a message (for example, the address of sender). See Figure 409, "Advanced search options" on page 359. To search multiple fields, hold down the Shift or Control key on your keyboard while you select each item, then click on *OK*. You can delete the search parameters by selecting the *cancel* button.

Figure 409 Advanced search options

The dialog box titled "Advanced search settings - Mozilla" contains two sections. The first section, "Search following fields", has a list box with "Subject", "Sender", and "Content". The second section, "Search following folders", has a list box with "Messages", "Sent", "Task", "Done", and "Rejected". At the bottom are "OK" and "Cancel" buttons.

You can reset the both the simple and the advanced search by clicking the *Reset* button.

31.6.2 Edit view: task/messages lists area

The middle area of the edit view displays a list of all the messages and tasks of the open directory. There are minor differences in the messages list and tasks list screens.

31.6.2.1 Messaging edit view: messages list area

The messages list area offers the following information about each message file (see Figure 407, "The edit screen (messaging module)" on page 358):

- *Subject*. This column describes the topic of the message.
- "Checkbox". To the left of the message title is a checkbox that you can use to select (or "mark") a message. When you activate the checkbox, you mark the message. The marked message appears in blue coloured font.
- *Date*. This column shows the day and time that the message was composed.
- *From*. This column indicates the sender of the message.
- Read (or not). A blue oval appears beside messages that have not been read. Once read, the button changes from blue to grey.

31.6.2.2 Task edit view: task list area

The middle part of the task edit view displays a list of all the tasks of the open directory. The list offers the following information about each task file (see Figure 410, "Task list" on page 360):

- *Subject*. This item describes the subject of the task.
- "Checkbox". To the left of the task subject is a check box that you can use to select (or "mark") a task. When you activate the check box, you mark the task. The marked message appears in blue coloured font in your directory tree.
- *Deadline*. This column indicates the date and time by which the task is to be completed.
- *Priority*. This column indicates the importance of the task on a scale of 1 (highest) to 10 (lowest).
- *Status*. This column indicates the progress of the completion of the task.

Figure 410 Task list

Subject	Deadline	Priority	Status
<input type="checkbox"/> Please review	2004-02-06 - 17:00	1	0%
<input type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%
<input checked="" type="checkbox"/> Release 3.0 information	2004-02-08 - 23:59	1	0%

Task	
Subject	Release 3.0 information
Deadline	2004-02-08 - 23:59
Status	0% <input type="text" value="100%"/>
Created by	webEdition (dan)
Assigned by	webEdition (dan)
Date of creation	2004-02-05 - 15:26
Please update the corporate Web site with the information about the features in Release 3.0.	

31.6.2.3 Viewing the contents of marked messages

The lower part of the edit section displays the contents of a message or a task. To view the contents of a message or a task, you must first mark the message by selecting the corresponding checkbox in the message/task list (see Figure 410, "Task list" on page 360).

32 Using the Task/Messaging Module

This chapter describes how to use the Task/Messaging Module. This section treats the following procedures, some of which are common for both tasks and messages:

- Section 32.1, "Creating, reading and replying to a message" on page 361
- Section 32.2, "Creating, reading, forwarding, and rejecting tasks" on page 363
- Section 32.3, "Common procedures" on page 368

32.1 Creating, reading and replying to a message

The procedures in this section treat how to use the basic features of the Messaging system to create, read, and reply to messages.

32.1.1 Creating a new message

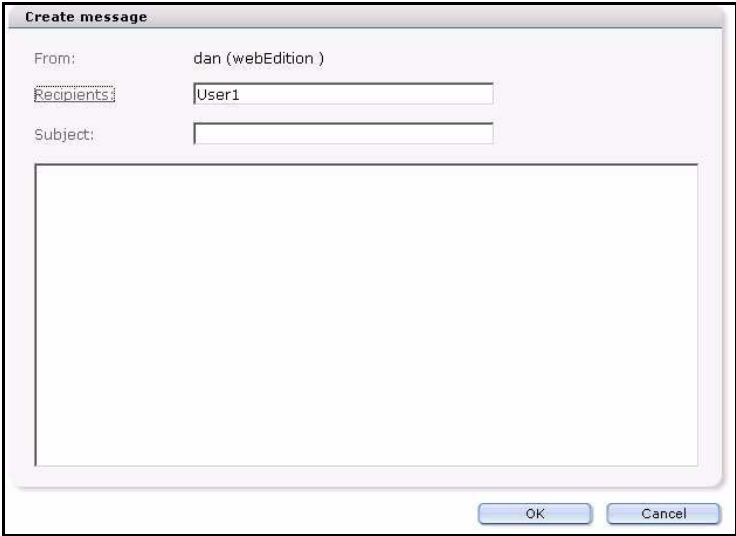
Use the following procedure to create a new message.

Procedure 58 Creating a new message

In the Messaging main screen

- 1 Click the *File > New > Message*, or click the *create message* icon.
A screen opens in which you can create your message (see Figure 411).

Figure 411 Create message screen



- 2 In the *Recipients* field, enter the E-mail address of the person to whom you wish to send the message. Enter the address by doing one of the following steps:
 - a Type an E-mail address directly in the field

- b Choose a receiver from your address book. For further information on how to use the address book, see Section 32.3, "Common procedures" on page 368.
- 3 Type the subject of your message in the *Subject* field.
- 4 Type your message in the contents text box below the *Subject* field.
- 5 Select OK to send your message.

The system opens an information window telling you whether or not your message was successfully sent.
- 6 Click the OK button to close the window.

The message will appear in the Sent folder of the explorer menu.
- 7 You have completed this procedure.

32.1.2 Reading a message

Use the following procedure to read the contents of a message. To learn how message notification operates in webEdition, see Section 32.3.1, "Task and message notification" on page 368.

Procedure 59 Reading a message

In the Messaging main screen

- 1 If you have not already done so, open the Messaging main screen.

All messages in the directory appear on the screen in the edit view. Each message is described under the headings of Subject, Date, From, and Read.
- 2 Click on the message to display the contents of the communiqué.

The contents of the message appears in the bottom half of your edit view.

Note: When a message had been read, the oval in the Read column turns from blue to grey colour.

Figure 412 Reading a message



- 3 You have completed this procedure.

32.1.3 Replying to a message

Use the following procedure to reply to a message.

Procedure 60 Replying to a message

In the Messaging main screen

- 1 If you have not already done so, open the message main screen. Mark the message to which you wish to reply by clicking in the checkbox to the left of the *Subject* field.
- 2 Click on the reply button.

A new window appears. The original sender appears automatically as the receiver and his/her original message appears at the top of the text box (see Figure 413).

Figure 413 Replying to a message

- 3 Write your reply message in the text box.
- 4 To send your reply, click the *OK* button.

The system opens a confirmation screen telling you that the message was successfully sent.

- 5 Click *OK* to close the confirmation screen.
- 6 You have completed this procedure.

32.2 Creating, reading, forwarding, and rejecting tasks

The procedures in this section describe how to use the basic features of the Task/Module to create, read, forward, and reject tasks. To learn how task notification operates in webEdition, see Section 32.3.1, "Task and message notification" on page 368

32.2.1 Creating a new task

Use the following procedure to create a new task.

Procedure 61 Creating a new task

In the Task main screen

- 1 Click on the *Create task* button.

The New Task screen opens (see Figure 414).

Figure 414 Creating a new task

New task

Assigner: dan (webEdition)

Recipient: User1

Subject: Release 3.0 information

Deadline: 08/02/2004 23:59

Priority: 1

Please update the corporate Web site with the information about the features in Release 3.0.

OK Cancel

- 2 Choose a recipient. Enter the address by doing the following:
 - a Type an E-mail address directly in the field.
 - b Choose a receiver from your address book. For further information on how to use the address book, see Section 32.3, "Common procedures" on page 368.
- 3 Type the subject of your task in the *Subject* field.
- 4 Use the *Deadline* pick lists to define the deadline for the completion of the task. To do so, complete the following sub-steps:
 - a Enter the date (day/month/year) in the first three fields.
 - b Enter the time (hour/minute) in the following two fields.
- 5 From the *Priority* select box, choose a priority status, where the priority defines the importance of each task. Choose one (1) to designate the highest priority, ten (10) to designate the lowest priority.
- 6 Write the details about the task you wish to assign in the text field below the *Priority* select box.
- 7 To send your task, click the *OK* button on the bottom of the form. (You can also choose to cancel the action by clicking the *Cancel* button.)

The system opens a confirmation screen telling you that the task was successfully created.
- 8 Click the *OK* button to close the screen.
- 9 You have completed this procedure.

32.2.2 Reading a task message

Use the following procedure to read the contents of a task.

Procedure 62 Reading a task message

In the task main screen

- 1 If you have not already done so, open the Task main screen.

All messages or tasks in the directory appear on the screen in the edit view (see Figure 422, "Task waiting!" on page 369).
- 2 Click on the task to display the contents of the communiqué.

The description of the task appears in the bottom half of your edit view.

Figure 415 Reading a task message from the task list

Subject	Deadline	Priority	Status
<input checked="" type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%

Task

Subject: Please complete 3.0 Marketing materials
Deadline: 2004-02-06 - 23:59
Status: 0%
Created by: webEdition (dan)
Assigned by: webEdition (dan)
Date of creation: 2004-02-05 - 15:38

Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.

3 You have completed this procedure.

32.2.3 Rejecting a task

Use the following procedure to reject a task.

Procedure 63 Rejecting a task

In the tasks list

- 1 Mark the task using the checkbox adjacent to the subject of the task message (see Figure 415, "Reading a task message from the task list" on page 365).
- 2 Select the *Reject task* button.
A new window opens (see Figure 416).

Figure 416 Rejecting a task

Reject task

From: webEdition (dan)
Rejected to: webEdition (dan)
Subject: Please complete 3.0 Marketing materials

I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.

- 3 Select the receiver.
- 4 Type your message in the text box.

- 5 To send the rejection message, click the OK button.
- 6 You have completed this procedure.

The system sends the task back to the originator, who will see a task appear in the Rejected folder in the explorer menu.

Figure 417 Rejected task notification

<div> <div>Messages - (0)</div> <div>Tasks - (0)</div> <div>Done - (0)</div> <div>Rejected - (1)</div> </div>	Search tasks: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Advanced"/> <input type="button" value="Reset"/>			
	Subject	Deadline	Priority	Status
	<input type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%

32.2.4 Forwarding a task

Use the following procedure to forward a task.

Procedure 64 Forwarding a task

In the Task main screen

- 1 If you have not already done so, open the Task main screen.
All messages or tasks in the directory appear on the screen in the edit view (see Figure 422, "Task waiting!" on page 369).
- 2 Click on the task to display the contents of the communiqué.
The description of the task appears in the bottom half of your edit view.
- 3 Mark the task, using the checkbox adjacent to the subject of the task message (see Figure 415, "Reading a task message from the task list" on page 365).
- 4 Select the *forward task* button.
A new window opens (see Figure 418).

Figure 418 Forwarding a task

Forward task

Assigner: dan (webEdition)
 Recipient:
 Subject:
 Deadline: 2004
 Priority:

Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.

--- User2 -- 2004-02-05 - 16:39 -- Rejected to dan
 I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.

I am forwarding this task notice that was returned to me from User2. Please see her comments above. The marketing materials are ready, and I have reviewed them. Please access them from the server and publish them by the indicated deadline.

- 5 Select the receiver from the recipients list.
- 6 Enter the content of your message in the text box.
- 7 Click the OK button to forward the task.

The system opens a confirmation screen telling you that the task was successfully forwarded.

- 8 Click *OK* to close the confirmation screen.
- 9 You have completed this procedure.

32.2.5 Updating a task

Procedure 65 Reading a task message

In the task main screen

- 1 If you have not already done so, open the Task main screen.
All messages or tasks in the directory appear on the screen in the edit view (see Figure 415, "Reading a task message from the task list" on page 365).
- 2 Click on the task to display the contents of the communiqué.
The description of the task appears in the bottom half of your edit view.
- 3 You can send an update report in two ways. If you wish to include comments in your report, or if you are partially finished
 - a If you have finished the task, you can click the 100% button in the lower register of the edit screen, then go to Step 7.
 - b If you wish to include comments in your report, or if you are partially finished go to Step 4.
- 4 Click the *Status update* icon, then
The Task status update screen appears (see Figure 419).

Figure 419 Task status update screen

Task status update	
Assigner	webEdition (dan)
Subject	Please complete 3.0 Marketing materials
Deadline	<div>06 02 2004</div> <div>23 59</div>
Status	80 %
Priority	1
<p>Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.</p> <p>--- User2 -- 2004-02-05 - 16:39 -- Rejected to dan I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.</p> <p>--- dan -- 2004-02-05 - 17:04 -- Forwarded to User1 I am forwarding this task notice that was returned to me from User2. Please see her comments above. The marketing materials are ready, and I have reviewed them. Please access them from the server and publish them by the indicated deadline.</p>	
Comment	<div>There are only a few items yet to process.</div> <div>All will be complete by the requested date.</div>

- 5 In the status field, enter a value representing the percentage of the task that is completed. You can also enter comments in the *Comments* box, if necessary.
- 6 Click *OK*.
- 7 You have completed this procedure. The assigner of the task will automatically be notified of the status update.

32.3 Common procedures

Common procedures are those which you can use in both the task and the messaging portions of the Task/Messaging Module.

The following topics and procedures are treated in this section:

- Section 32.3.1, "Task and message notification" on page 368
- Section 32.3.2, "Using the address book feature" on page 369
- Section 32.3.3, "Creating or changing a folder or directory" on page 371
- Section 32.3.4, "Copying, cutting and inserting selected tasks or messages" on page 372
- Section 32.3.5, "Deleting a message or task" on page 372

32.3.1 Task and message notification

When you have been assigned a task, webEdition automatically notifies you. Use the following procedure to access tasks (and messages) that have been assigned to you.

Procedure 66 Task notification

In the webEdition main screen

- 1 When you log in to the webEdition main screen, there are two indicators:
 - a The webEdition *Quickstart* screen displays the number of new tasks and messages that await you (see Figure 420).

Figure 420 Quickstart task notification



- b In the upper right corner of the webEdition main screen, there is a message and a task icon. The number adjacent to the icon indicates the number of items that await your response.

Figure 421 Task and message notification icons



- 2 Click on either of the task icons to launch the *Task* system. (Likewise, if you have received a message indicator, click on the message icon).

The system opens the task view showing you your assigned tasks (see Figure 422).

Figure 422 Task waiting!

Messages - (2)

Tasks - (1)

Done - (0)

Rejected - (0)

Search tasks:

Search

Advanced

Reset

Subject	Deadline	Priority	Status
<div><div></div><div>Please complete 3.0 Marketing materials</div></div>	2004-02-06 - 23:59	1	0%

- You have completed this procedure.

After accessing the Task system, the numeric task or message indicators described in this procedure in Step 1 on page 368, are reset to zero (0).

32.3.2 Using the address book feature

The address book feature relies on the user data entered into webEdition with the User Management Module. Hence all of your internal registered webEdition users will already have their profile entered into the system and you can access this data to build your personal address book. The following steps describe how to use the address book feature to add webEdition users to your address book and to select users from the address book

32.3.2.1 Adding an internal user to your address book

Procedure 67 Adding an internal user to your address book

In the Messaging main screen

- Open the *Create message* screen by clicking *File > New > Message*.
- Click on the word *Recipients*.

The *Select recipients* screen opens (see Figure 423).

Figure 423 Select recipients screen

- Click the *Select user* button on the bottom of the *Select recipients* screen.

The *Select user* screen appears, offering a list of all of your webEdition registered users (see Figure 424).

Figure 424 Select user screen

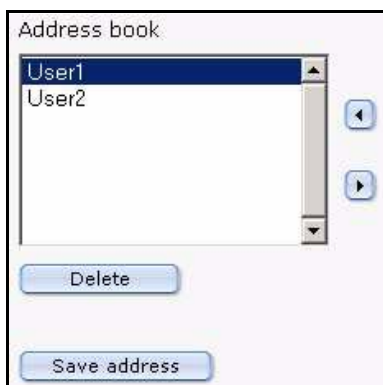
- 4 Using the checkbox beside each name, select the user(s) that you wish to add to your address book.
- 5 Click the OK button.

This action moves the data of the newly selected addresses to the Selected box on the Select recipients screen.

Figure 425 Selected users box

- 6 To move the new name(s) to the address book, highlight the name, then click on the left arrow.

The name appears in the Address book box.

Figure 426 New users in the address book

- 7 Save the address book by clicking the Save address button.
The system opens a confirmation window telling you that the address book has been saved.
- 8 Close the confirmation window by clicking OK.
The new address is saved in your address book.
- 9 You have completed this procedure.

32.3.2.2 Choosing a recipient from the address book

Procedure 68 Choosing a recipient from the address book

In the Messaging main screen

- 1 Open the Create message screen by clicking File > New > Message.

- 2 Click on the word *Recipients*.

The Select recipients screen opens (see Figure 423, "Select recipients screen" on page 369), in the Address book box is a list of users in your address book (see Figure 426, "New users in the address book" on page 370)

- 3 Select a recipient (or recipients) from your address book by highlighting the names from the Address book list.
- 4 Click the right arrow between the Address book and Selected box.
The recipients appear in the Selected box on the right side of the screen.
- 5 Click the OK button.

The Select recipients screen closes and the user appears in the Recipients field of the Create message screen. Thereafter, you can complete and send your message.

- 6 You have completed this procedure.

32.3.3 Creating or changing a folder or directory

Use the following procedure to create a new folder or directory.

Procedure 69 Creating or changing a folder or directory

In the Task or Messaging main screen

- 1 Go to the File drop-down menu and click *New > Folder*.
The New folder view appears (see Figure 427).

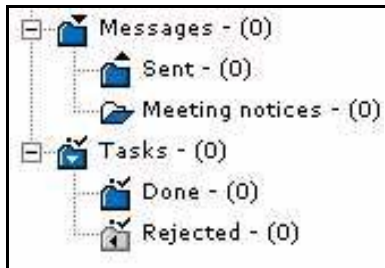
Figure 427 *New folder view*

- 2 In the *Folder name* field, type the name of your new folder.
- 3 Using the *Parent folder* select box, choose the directory in which the folder is to be saved.

Note: To select a top-level directory, choose *None* from the list.

- 4 Choose the type of communiqué: *webEdition Message* or *Task*.
- 5 Click the Save button.

The system confirms the action. Click OK. The new folder appears in the explorer menu (see Figure 428).

Figure 428 New message folder in explorer menu

6 You have completed this procedure.

32.3.4 Copying, cutting and inserting selected tasks or messages

Use the following procedure to copy or cut, and insert selected files.

Note: To select multiple files, you must make sure that the "multiple selection" button at the top of the page is activated. (The select multiple files feature is activated when the arrow on the icon appears in black.)

Procedure 70 Copying, cutting, and inserting files

In the task or messaging edit view

- 1 Mark the task or message by activating the corresponding checkbox in the task or messaging file list.
- 2 Select the *Copy* or the *Cut* button.
- 3 In the file navigator window on the left side of the screen, highlight the directory into which you wish to move your file.
- 4 Select the *Paste* button to insert your file into the directory. The file appears in the new directory.
- 5 You have completed this procedure.

32.3.5 Deleting a message or task

Use the following procedure to delete selected files.

Procedure 71 Deleting a message or task

In the task or messaging edit view

- 1 Mark the files for deletion by activating the corresponding checkbox in the task or messaging file list.
- 2 Click the "trash can" icon.

A dialogue box opens asking you to confirm that you wish to delete the task or message.
- 3 Select *ok* to confirm the deletion, or *cancel* to terminate the process.

If you select ok, the selected files are deleted and will no longer appear in the file menu.
- 4 You have completed this procedure.

33 User Management: Introduction

This introduction is intended to help you familiarize yourself with the webEdition User Management Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the User Management Module. These topics are treated in the following sections:

- Section 33.1, "What is the webEdition User Management Module?" on page 373
- Section 33.2, "Installation" on page 373
- Section 33.3, "Access control feature" on page 373
- Section 33.4, "General information and navigation" on page 374

33.1 What is the webEdition User Management Module?

The webEdition software differentiates between the role of the administrator and the role of the editor. Normally, the administrator is responsible for the design and creation of the templates, whereas the editor creates and maintains the content. The webEdition User Management Module allows you to manage as many administrators and editors as you want.

33.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

33.3 Access control feature

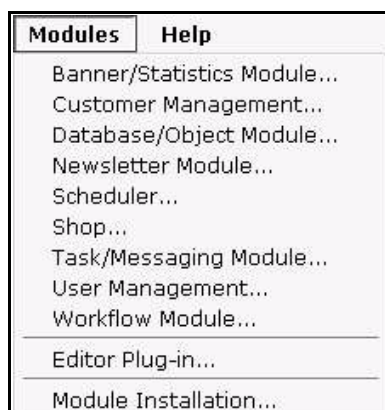
The webEdition User Management Module prevents multiple users from editing documents simultaneously. Thus the potential risk of over-writing is minimized.

A document can be edited by only one user at any given time. If two or more users are logged onto the server and attempt to open the same document, the document will only be made available to the user who selected it first. If any other users try to open the document, a dialog box will appear on their screen informing them that the document is currently being edited by user "XYZ". As soon as user "XYZ" closes the document, opens another document or logs off, another user will be allowed to edit the document.

33.4 General information and navigation

After installation, you will find a new menu item in the webEdition main menu called *Modules*, which contains all the modules in your installation of webEdition (see Figure 429).

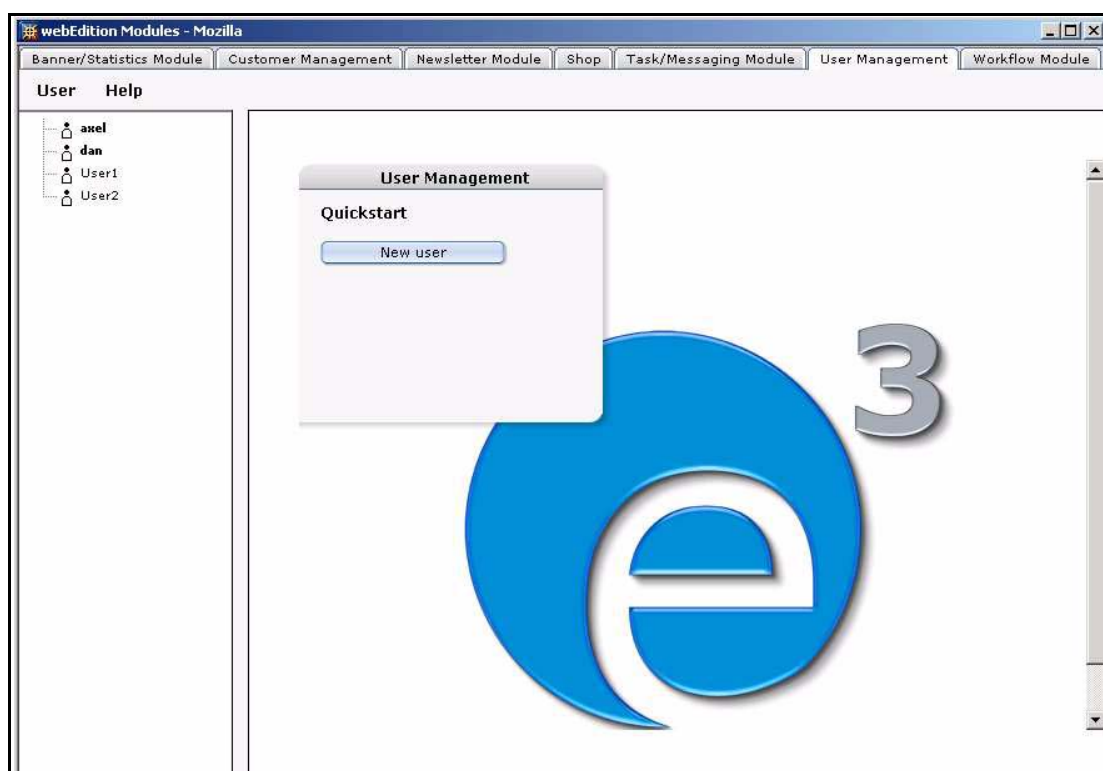
Figure 429 Modules drop-down menu



33.4.1 Opening the module

Select *User Management* from the *Modules* menu to open the User Management main screen. The User Management Module main screen opens showing the *Quickstart* screen (see Figure 430).

Figure 430 User Management Module: main screen and *Quickstart* option



Using the *Quickstart* screen, you have the option of going directly to the add new user screens.

You can return to the *Quickstart* screen at any time by clicking on the *User Management* tab.

33.4.2 Drop-down menu commands

On the User Management main screen, a list of users appears in the explorer menu; two drop-down menus appear in the upper left: *User* and *Help*, as seen in Figure 430, "User Management Module: main screen and Quickstart option" on page 374.

33.4.2.1 The *User* menu

The *User* menu has the following items (see Figure 431, "User Management User menu" on page 375):

- *New*. Use this command to create a new user (administrator or editor).
- *Save*. Use this command to save entries/changes made to users.
- *Delete*. Use this command to delete existing users (administrators or editors). You must confirm your deletion by clicking *OK* in the dialog box.
- *Exit*. Use this command to exit the User Management Module.

Figure 431 User Management *User* menu



33.4.2.2 *Help* menu

The main screen also has a *Help* menu. Use the *Help* command to access the help program for the User Management Module.

34 Working with the User Management Module

The following sections describe some of the basic procedures that you can perform with the User Management Module:

- Section 34.1, "Creating new users: administrators and editors" on page 377
- Section 34.2, "Changing user settings" on page 378
- Section 34.3, "Deleting users" on page 379

ATTENTION

Only an administrator can create or delete users and change user permissions. These options will not be available if you have logged into the webEdition system as an editor.

34.1 Creating new users: administrators and editors

The following procedure describes how to create new users and how to assign administrative or editorial privileges to a user.

Procedure 72 Creating a new user

In the webEdition Start Screen

- 1 Log into webEdition as "administrator".
- 2 Select *User Management* from the *Modules* menu.
- 3 In the User Management main screen, click *New user* in the *Quickstart* menu, or click on *User > New > User*.

The user Data view appears which has two parts: User data and Permissions (see Figure 432).

Figure 432 User Data view

- 4 In the first two fields of the *User data* area, enter the following data:
 - a First name of the new user
 - b Last name of the new user
- 5 In the next two fields enter the following data:
 - a *User name*. The name that will identify the user in webEdition.
 - b *Password*. Enter an alphanumeric string of at least 4 characters.
- 6 If you wish to create an administrator, go to Step 7. If you wish to create an author, go to Step 8.
- 7 To give a user administrative permissions, click on the *Administrator permissions* button, then go to Step 11.

Note: You cannot restrict the administrator's workspace - the option Specify/select workspace is inactive.

- 8 To give a user authoring or editing permissions, click on the *User permissions* button.
- 9 You can allocate a special workspace in webEdition to this user by clicking on the *Specify workspace* button.
- 10 Click on the *Select* button to browse and select the directories in which the author is allowed to work.

Note: The next time the author or editor logs on, the templates menu will be deactivated and the explorer menu will display the directory allocated by the administrator as the editor's workspace.

- 11 Save your changes by clicking on the *Save* button.
- 12 You have completed this procedure.

34.2 Changing user settings

Use the following procedure to change user settings.

Procedure 73 Changing user settings

In the User Management main screen

- 1 Log into webEdition as "administrator".
- 2 Go to the user list in the explorer menu, and click on the user whose data you wish to change.

The system displays the user Data view.

- 3 Make your changes.
- 4 Save your entries.
- 5 You have completed this procedure.

34.3 Deleting users

Use the following procedure to delete a user from webEdition.

Procedure 74 Deleting users

In the User Management main screen

- 1 Log into webEdition as "administrator".
- 2 Go to the user list in the explorer menu, and click on the user whose data you wish to change.

The system displays the user Data view.

- 3 Select the *Delete* command from the *User* menu.
- 4 When prompted by the system, confirm or cancel the action.

If you click OK, the selected user data will be deleted, the corresponding icon will disappear from the explorer menu, and the system will return to the User Management Module main screen.

- 5 You have completed this procedure.

35 User Management PRO: Introduction

This introduction is intended to help you familiarize yourself with the webEdition User Management PRO Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the User Management PRO Module. These topics are treated in the following sections:

- Section 35.1, "What is the webEdition User Management PRO Module?" on page 381.
- Section 35.2, "Installation" on page 382.
- Section 35.3, "General information and navigation" on page 382.

35.1 What is the webEdition User Management PRO Module?

The webEdition User Management PRO Module is designed to administer complex user structures. With this module you can set different permissions for working with documents, templates, directories and the system itself. Unlike the standard User Management Module, you can establish user groups with the PRO module. You can also create sub-groups on various levels. Each user can be assigned to individual or multiple groups.

Each individual object (text area, images) in a document can be assigned access privileges so you can precisely define which individual users or group members are permitted to create or modify a document/object. Specific workspaces and templates (in whole or in part) can be allocated to users.

35.1.1 User Management PRO and your organization

The User Management PRO Module allows you to assign permissions for the editing of your web site in a manner that is suitable to the structures of your company. You can grant access permissions to specified areas of your web site to specified individuals or groups within your organization. For example, you can create workspaces that correspond to the departments in your company; you can create user groups called "PR", "Sales" and "Marketing" and assign workspaces and relevant templates to them. Each group can define a department manager as a group administrator who has more permissions within his or her group. Group administrators can create sub-groups or create new users for these sub-groups. When a template administrator creates your webEdition templates, you can assign users or groups to specific portions of a document. You can, for example, allocate a text area exclusively to the "Sales" group, while only the "PR" group would be permitted to edit the pictures to go with the text area. New attributes in the we:tags have to be defined for this to be possible.

35.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

35.3 General information and navigation

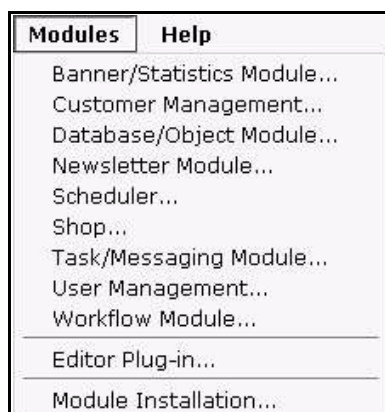
After installing the User Management PRO Module, the command *Change user* (normally seen in the *Options* menu in the standard version of webEdition) will be replaced by the command *User management* in the *Edit* menu (see Figure 433).

Figure 433 The *Options* menu showing *User management* command

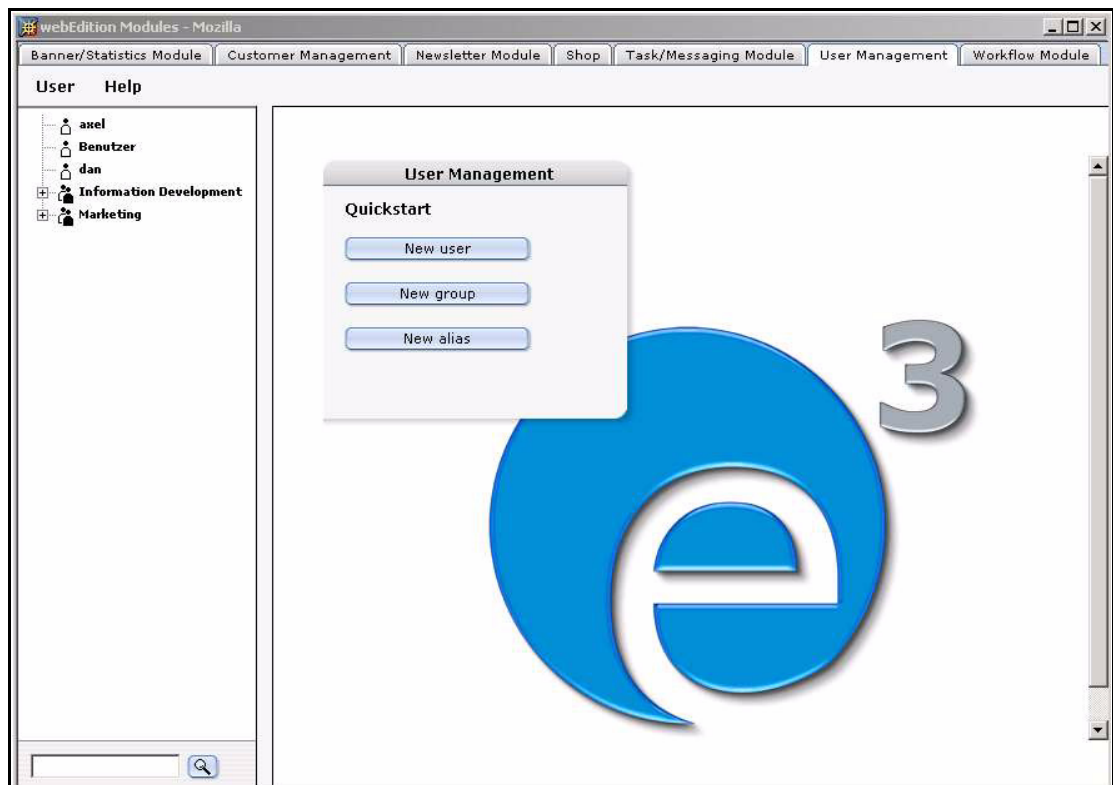


You will also see the option *User management* in the *Modules* menu (see Figure 434).

Figure 434 The *Modules* menu



Select *User management* from the *Modules* menu to open the User Management PRO main screen. The main User Management Module page opens showing the *Quickstart* screen (see Figure 435).

Figure 435 User Management Module: *Quickstart* screen

Using the *Quickstart* screen, you have the option of going directly to a new user, a new group or to a new alias.

35.3.1 The User Management PRO *User* menu

The User Management PRO Module *User* menu has the following items (see Figure 436).

**Figure 436 The *User* menu**

- Save. This command allows you to save the current user(s), group(s), or alias(es).
- Delete. This command allows you to delete the current user(s), group(s), or alias(es).
- Exit. Use this command to exit the module.
- New. The *New* menu has the following sub-items (see Figure 436, "The User menu" on page 383):
 - User. This command allows you to create an identity for a user in the system.
 - Alias. This command allows you to create a copy of an individual user's main identity
 - Group. This command allows you to create a group or sub-group of users.

35.3.2 The User Management PRO explorer menu

The explorer menu in User Management PRO Module is structured like the menu used for documents and templates. There are two types of icons as seen in Figure 437:

- icon of a group
- icon of an individual user

Figure 437 Explorer menu: individual and group icons



The group icon can represent members and sub-groups. You can view the members and the sub-groups of a group by clicking on the plus "+" icon next to a group symbol (see Figure 438). The sub-groups can also contain users and groups of their own.

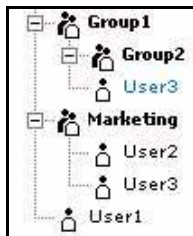


Figure 438 Explorer menu users and groups

Since individual users cannot have any "sub-users", they are one-level in nature. Users that appear in blue colour in the explorer menu are "aliases".

35.3.3 The User Management PRO Module main screen

The main screen is designed to allow you to enter and change data about your users and groups. To access the main screen, go to the explorer menu and click on the user or group whose data you wish to view or change.

The edit mode of the User Management PRO Module has three tabs, *Data*, *Permissions* and *Workspace*. You can access the associated views by clicking on the respective tab (see Figure 439).



Figure 439 User Management PRO area tabs

Each of these views is discussed in more detail below.

35.3.3.1 The *Data* view

The *Data* view stores all the personal data of a particular user (see Figure 440). Only the administrator can change this information.

Figure 440 The Data view
35.3.3.2 The Permissions view

The Permissions view allows administrators to allocate permissions for a user (see Figure 441).

Note: Your view of the *Permissions* will vary depending on what modules you have installed.

Figure 441 The Permissions view

The permissions are divided into the following options:

- "Permissions for installed modules". The webEdition modules have permissions that can be customized in the *Permissions* view of the User Management PRO Module. These options will vary depending on what modules you have installed. For information on how to set these permissions, see the documentation for the individual modules.

Note: If you have not installed all modules listed in Figure 441, "The Permissions view" on page 385, you will not be able to see these permissions in User Management PRO Module.

- *Work permissions*. In this area, you can assign any permissions related to working on documents and templates.
- *Control permissions*. In this area, you can assign any right related to the administration of users and groups.

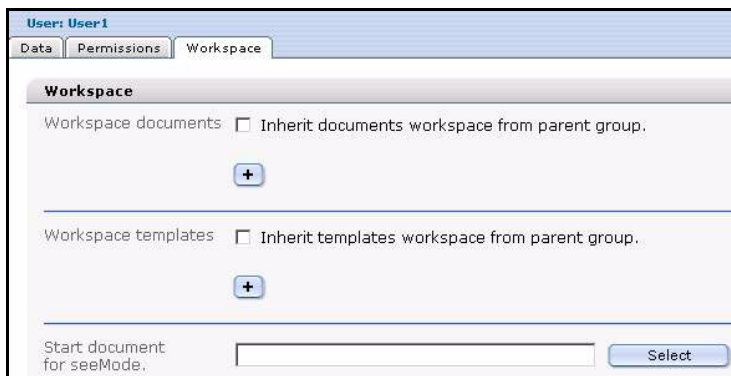
Click the arrows next to the permission options to reveal a series of check boxes indicating all the permissions that you can assign to your users.

35.3.3.3 The *Workspace* view

The *Workspace* view allows administrators to assign workspaces and templates to a user or group of users.

In the *Workspace* view, you can allocate users to fixed workspaces and special template sections. You can also assign more than one workspace or template section to a user by clicking on the "+" (plus) button. When users login to webEdition using the login data assigned to them in the *Data* view, the explorer menu will display only the workspaces allocated to them and they will only be able to use their assigned templates (see Figure 442).

Figure 442 The *Workspace* view



The *Workspace* view has the following areas:

- *Workspace documents* and *Workspace templates*. These areas have similar user controls. The checkboxes in *Workspace documents* and *Workspace templates* sections allow you to assign to users the workspaces and templates from the groups in which they are members. The trash bin icon allows you to delete the access to workspaces and templates for a particular user.

If you activate the *Default* checkbox in the *Workspace documents* area in conjunction with the Database/Object Module, you can assign default status to the workspace for which you intend to create new objects. The default workspace is the only workspace in which you can create objects based on the classes allocated in the Database/Object Module.

- *Start document for SeeMode*.

The User Management PRO Module allows you to assign a start document to a user who logs into webEdition in Super-Easy-Edit-Mode (SeeMode). Once a specified document has been selected, that document will automatically open for the user as soon as he/she logs in. For further details about the SeeMode, see *The webEdition User Guide*.

36 Creating users, groups and "aliases" in the User Management PRO Module

This chapter is intended to show you how to create new users, user groups or aliases by using the webEdition User Management PRO module. The following topics are treated in this chapter:

- Section 36.1, "Creating a new user" on page 387
- Section 36.2, "Creating a new group" on page 390
- Section 36.3, "Administering group membership" on page 391
- Section 36.4, "Creating an alias" on page 392

ATTENTION

Only an administrator and users who have been granted the appropriate permissions in the User Management PRO Module can create and maintain users and user groups. These options will not be available to you if you are not an administrator, or if you have not been given permission by the administrator to create, change or delete users or user groups.

36.1 Creating a new user

Use the following procedure to create a new webEdition user. When creating a new user you will be required to enter information in each of the areas that were described in Section 35.3.3, "The User Management PRO Module main screen" on page 384. This procedure has three parts, each part corresponds to an area (*Data*, *Permissions* or *Workspace*) in edit mode.

Procedure 75 Creating a new user

In the User Management PRO Module main screen (Part 1: the Data view)

- 1 To create a new user, click *User > New > User* in the User Management PRO Module.
- 2 Select the *Data* tab.

The system opens the Data view (see Figure 443).

Figure 443 The Data view

- 3 Enter all user-related information in the *General data* area.
- 4 Allocate user names and passwords to new users in the *User data* area so that they can log in.
- 5 Assign the new user to a group in the *Group* section if they are to have their main identity within a group.
- 6 You have completed Part 1. Go to Part 2.

(Part 2: the Permissions view)

- 7 Go to the *Permissions* view by clicking the *Permissions* tab.
The system opens the *Permissions* view (see Figure 444).

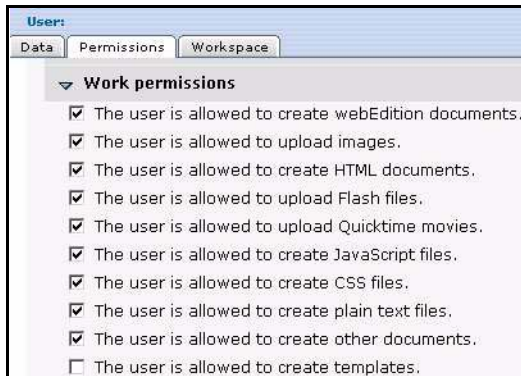
Figure 444 The Permissions view

- 8 Click on the arrow next to *Work permissions* to reveal a series of check boxes indicating all the work permissions that you can assign to your users.

- 9 Assign the work permissions by selecting the appropriate checkboxes (see Figure 445 for a partial list of work permissions).

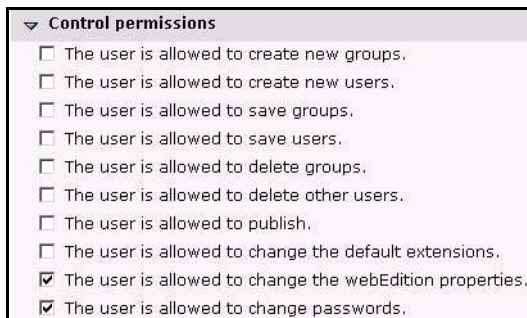
Note: The designation "Create" always refers to the menu item *File > New*. If any permissions are not available, the functions will be grayed out in the *File* menu.

Figure 445 Work permissions



- 10 Click on the arrow next to *Work permissions* to minimize the view, then click on the arrow next to *Control permissions* to reveal a series of check boxes indicating all the control permissions that you can assign to your users.
- 11 Assign the control permissions by selecting the appropriate checkboxes (see Figure 446).

Figure 446 Control permissions



- 12 Click on the arrow next to *Control permissions* to minimize the view.
- 13 If you wish the user to have full administrative permissions, select the *Administrator permissions* check box that appears under the permission options (Refer to Figure 444, "The Permissions view" on page 388). Otherwise, leave this box unchecked.
- 14 If you want your user to inherit the existing rights from a parent group, use the last checkbox in the *Permissions* area, otherwise, leave this box unchecked.

(Part 3: the Workspace view)

- 15 Click the *Workspace* tab.

The system opens the Workspace view as seen in Figure 447.

Figure 447 The Workspace view

16 If you wish to assign to a user the same workspaces and templates that have been assigned to the group to which that user belongs, activate the checkboxes in *Workspace documents* and/or *Workspace templates*. Otherwise go to Step 17.

17 Click on the plus button below the checkboxes.

A field appears that allows you to select a workspace (see Figure 448).

Figure 448 Selecting a workspace

18 Click the *Select* button to access a list of your directories from which you can choose the document or template you wish to assign to your user.

The system opens a Look in server browser (see Figure 449).

Figure 449 Look in server browser

File name	Modified
banner	2003-11-23 - 17:10
filmberichte	2002-12-18 - 18:17
layout_images	2002-12-18 - 18:56
links	2002-12-18 - 19:25
news	2002-12-18 - 18:48
newsletter	2003-07-02 - 17:18

19 Click the appropriate folder name, then click the *OK* button.

The name of the workspace or template will appear in the field to the left of the Select button.

20 Click the *Save* button at the bottom of the page.

21 You have completed this procedure.

36.2 Creating a new group

Use the following procedures to create a new user group. As above, in Procedure 75, "Creating a new user" on page 387, you must enter data into each of the three areas: the *Data*, *Permissions*, and *Workspace* areas.

Procedure 76 Creating a new group

In the User Management PRO Module main screen (Part 1: the Data view)

- 1 To create a new group, click *User > New > Group* in the User Management PRO Module.
- 2 In the *Data* view, enter all group-related information in the *Group data* area (see Figure 450).

Figure 450 Group data area

Note 1: The new group can be assigned to an existing group as a sub-group in the Group section.

Note 2: A new group will not yet have any members. Therefore the *User* area under the *Group data* area will be empty.

(Part 2: the Permissions view)

- 3 The *Permissions* view for the creation of a new group is the same as that for an individual user, with one exception: a group can never possess administrative permissions. Go to Procedure 75, "Creating a new user" on page 387, and complete Step 7 to Step 14, then go to Step 4 of the present procedure.

(Part 3: the Workspace view)

- 4 The *Workspace* view for the creation of a new group is the same as that for an individual user. Go to Procedure 75, "Creating a new user" on page 387, and complete Step 15 to 17 then return to the present procedure.
- 5 Select the *Save* button at the bottom of the page.
- 6 You have completed this procedure.

36.3 Administering group membership

Use the following procedure to add, change or delete members in a group.

Procedure 77 Adding and editing group members

In the User Management PRO Module main screen

- 1 You can assign new and existing users to a group. Do one of the following sub steps:
 - a To assign a new user to a group, see Part 1 of Procedure 75, "Creating a new user" on page 387.
 - b To assign an existing user to a group, go to the explorer menu and click on the icon of a user, then change that user's group affiliation by clicking the *Select* button adjacent to the *Group* field in the *Data > User data* view.

Figure 451 Assigning a user to a group

All members of this group will be listed in the User section. The icon representing the user also appears in the explorer menu in their assigned group folder

- 2 To edit the members of a group, highlight a user and click the *Edit* button.
The system opens the Data view for the user you have selected. There you can edit the user profile and change the group affiliation.
- 3 You have completed this procedure.

36.4 Creating an alias

Each user has only one main identity—either as an individual user or as a member of a group. Users whose main identity is already assigned to another group use "aliases" (that is, another name), to join one or several additional groups. An "alias" is a copy of an individual user's main identity. This copy can be assigned to the group and is indivisibly linked to the main identity of the user.

Procedure 78 Creating an alias

In the User Management PRO Module main screen

- 1 Click on *User > New > Alias*.
The *Data* view appears (see *Figure 452*)

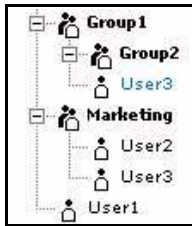
Figure 452 The Alias view Data area

- 2 To allocate an "alias" to an existing user, use the *Select* button adjacent to the *User* field to browse the user list and to find the user's main identity.

- 3 Create an alias for the user by assigning him or her to another group. To do so, click the *Select* button adjacent to the *Group membership* to find the group that will include the new "alias".
- 4 You can use the checkboxes in the *Permissions and workspaces* area to assign to the "alias" the permissions, documents, and the templates of the parent group.
- 5 Click Save.

"Aliases" are displayed in blue in the explorer menu as seen in Figure 453.

Figure 453 Alias in the explorer menu



"Aliases" are displayed in square brackets in the User member summary for the groups in the Data view (see Figure 454)

Figure 454 Alias in a the group

Group: Group 1

Data Permissions Workspace

Data

Group data

Group name: **Group1**

Description: Group 1 is a test group.

Group: /

User: [User3]

Edit

- 6 You have completed this procedure.

37 User Management PRO Module tags and functions

The following we:tags have been expanded to include a new attribute, *user*, for the User Management PRO Module:

- `<we:flashmovie>`
- `<we:href>`
- `<we:img>`
- `<we:input>` (all types)
- `<we:textarea>`

All these functions can be controlled directly using the User Management PRO Module. If you set the user attribute in these tags, you will be able to limit the function of that particular the we:tag to the users and groups specified in the user attribute. These attributes will remain in effect no matter what global permissions are assigned to individual users and groups in the *Permissions* area in User Management PRO Module. For example:

```
<we:textarea name="Text" cols="60" rows="30" dhtmledit="on"
showMenus="on" autobr="on" user="writer"/>
```

This example shows how you can limit the access to a single user, in this case the text area called *Text* can only be edited by the user called *writer*.

For further information about the advanced uses and syntax for the *user* attribute, consult the *webEdition Tag Reference Manual* at <http://www.webedition.de/english/downloads/Documentation.html>

38 Voting Module: Introduction

This chapter is intended to help you familiarize with the webEdition Voting Module and its features. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Voting Module. These topics are treated in the following sections:

- Section 38.1, "What is the Voting Module?" on page 397
- Section 38.2, "Installation" on page 397.
- Section 38.3, "General information and tips on navigation" on page 397.

38.1 What is the Voting Module?

With the webEdition Voting Module, you can easily create and maintain votings on your webEdition site. The installation and handling of the Voting Module corresponds to the webEdition Look&Feel; you therefore do not have to perform complicated configurations to offer this additional service to your visitors. The analysis of the votings is embedded seamlessly in the webEdition design philosophy and can get you and your customers informative insights about your web site visitors. The Votings are administered layout-neutrally in the webEdition GUI and are integrated with voting specific we:tags seamlessly into your page.

The Voting Module particularly appeals to users who want to generate day-actual information for themselves and their visitors from a webEdition web site.

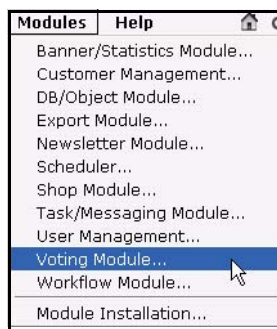
38.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL.: <http://webedition.de/en/serviceCenter/docu.php>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

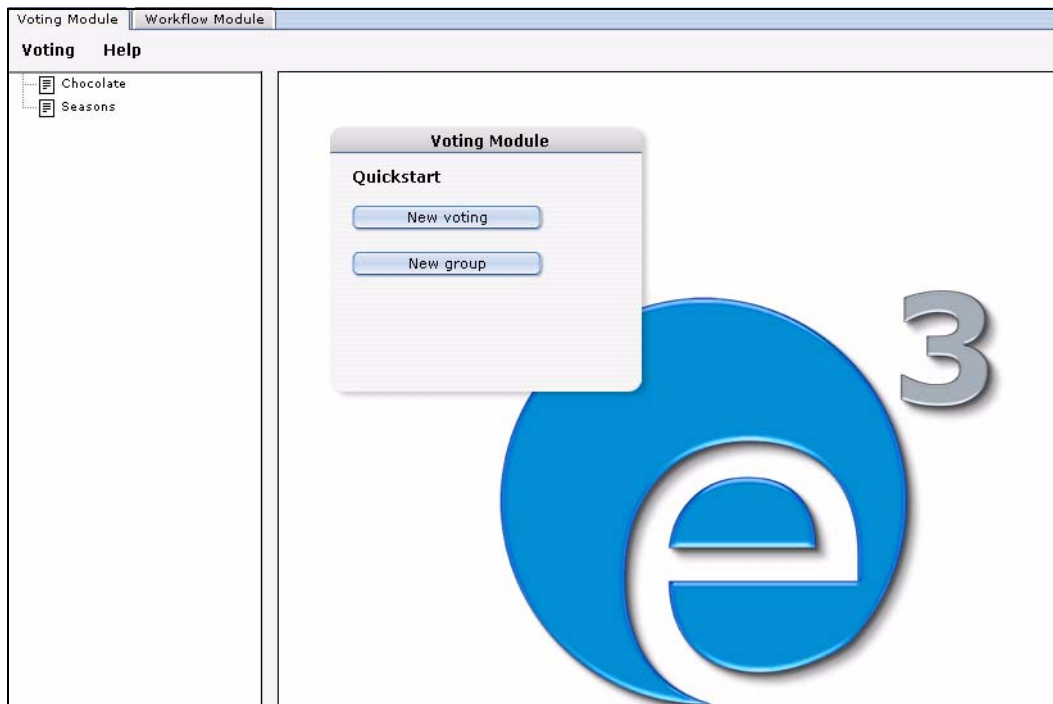
38.3 General information and tips on navigation

After the installation, a new menu item appears in the webEdition *Modules* menu. See Figure 455, "Modules Dropdown Menu" on page 398.

Figure 455 Modules Dropdown Menu

38.4 Start Module

To open the Voting Module, click on *Voting Module...* from the *Modules* Dropdownmenu on the webEdition mainscreen. The Quickstart screen will appear, as shown in Figure 456.

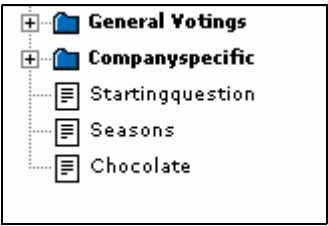
Figure 456 Voting Module: Quickstart Screen

In the *Quickstart* screen, you can directly create a new voting or a group.

38.4.1 Voting Module Explorer menu

The explorer menu on the left hand of the screen shows a list of your votings and groups (see Figure 457).

Figure 457 Voting module explorer menu



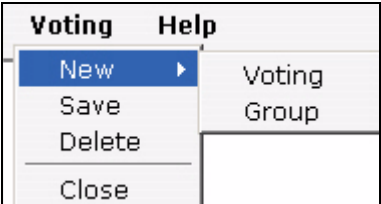
38.5 The menus

Click *Modules > Voting Module* to access the module window(see Figure 456). Here you can find the *Voting* and the *Help* menu.

38.5.1 The *Voting* dropdown menu

In the dropdownmenu *Voting*, the following items are located (see Figure 458).

Figure 458 *Voting* dropdown menu



- *New (Voting/Group)* Click *New > Voting / Group* to define a new Voting resp. a new group.
- *Save* Click *Save* to permanently save your voting or group.
- *Delete* Deletes the currently selected voting or group.
- *Quit* Leave the module window and return to the webEdition main screen.

38.5.2 *Help*-dropdown menu

In the *Help*-dropdownmenu you will find the following items (see Figure 459).

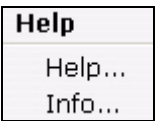


Figure 459 *Help* dropdown menu

- *Help*. This item provides Help screens.
- *Info*. This item provides information about the application.

38.6 Voting Module views

The webEdition Voting Module consists of the following views, which can be accessed via the respective Tabs: *Properties*, *Inquiry* and *Result*.

38.6.1 The *Properties* view

The basic settings for your voting are defined in the *properties* view.

Select *Voting > New* from the Voting menu to access the *Properties* view(see Figure 460):

Figure 460 *Properties view*

The *Properties* view consists of the areas *Properties*, *Revote control* and *Validity*.

- *Properties*: Give your Voting an unequivocal name. You can also add your voting to an existing *group* which you can select by clicking on *Select*. The *Create Date* dropdown menu serves to be able to enter by hand a data which can be read out and be used as a sort criteria; it does not schedule time-controlled publication! For this purpose, you would have to use the webEdition Scheduler Module (PRO). To quit a Voting time controlled, please use the function *Validity*. The check box *Limit access* appears only if the *User management (PRO)* is installed. Activate this check box and select user(s) who may access the Voting to limit the access.
- *Revote control*: Here you can determine, whether, and if so in which intervals, users can vote for the Voting once more. Select your preferential method with the radiobuttons *By Cookie* or *By IP* and determine with the Dropdownmenu a least interval to a possible new voting. You find explanations to both methods in the info box above the radiobuttons which you can enlarge by clicking the triangle.

	<p style="text-align: center;">ATTENTION</p> <p>Please note, that the method <i>By Cookie</i> requires the <code><we:writeVoting/></code> tag to be in the very first line of the template where it is used!</p>
--	---

- *Validity*: The check box *Active till* must be activated, so that the voting on your site is saved and is "parked" at the end of the validity. Determine with the dropdownmenus the data and time to which the voting should run. No more votes are accepted from this time. You can, of course, switch the voting state at any time.

38.6.2 The *Inquiry* view

This view consists of the area *Inquiry Data* (see Figure 461).

Figure 461 *Inquiry* view

In this area the following elements are located:

- *Version* dropdownmenu: You can define different versions of your voting. This makes sense, for example, with different language versions. Then the results of the different languages are evaluated together and displayed in one result overview.
- *Question*: Enter here the text of your question, as it should be displayed on your page. If you are planning to use multiple *Versions*, select the correct *Version* from the dropdownmenu and enter the question.
- *Answers*: Enter the possible answers in the text fields. Click on the + symbol to add answer textfields.

Note: At least two possible answers have to be given.

38.6.3 The *Result* view

This view consist of the areas *Inquiry* and *Export*. In the *Inquiry* area, the actual result of the voting is displayed. The result consits of the answers of all (language-) versions of the voting. Click on *Reset Scores* to set the voting to zero. The result is displayed in absolute numbers as well as in per cent. The bar chart makes it easy to rate the result.

Figure 462 The Result view

Voting: Chocolate

Properties Inquiry **Result**

Inquiry

Chocolate...

... is great	<div><div></div></div> 62%	46
... is too sweet	<div><div></div></div> 9%	7
... makes you fat	<div><div></div></div> 28%	21
Total voting:		74

[Reset scores](#)

Export

Export votings data to a CSV file (comma separated values).

Directory
/ [Select](#)

File format
Windows format

Delimiter
; {semicolon}

Enclose character
" {double quote}

[Export](#)

In the *Export* area, you can export your voting results as a CSV file. For the exact procedure, please see procedure 82.

39 Using the Voting Module

In this chapter the following topics are treated:

- Section 39.1, "Create a new Vote" on page 403
- Section 39.2, "Vote groups" on page 405
- Section 39.3, "Vote result" on page 405

39.1 Create a new Vote

Votings in the webEdition Voting Module are created very easy in the module window. Click *Voting > New > Voting* or *New Voting* in the Quickstart, to create a new voting.

Procedure 79 Define a new vote

In the Voting Module main screen

- 1 Select a name for your voting. Enter it in the corresponding field in the *Properties* area
- 2 Press the *Select* Button to assign the voting to an existing group
- 3 Specify now the *Create Date* by using the dropdown menu. Please note, that this concerns the date published; this is **not** a function for scheduled publishing of the Votings. For that task, please use the webEdition Scheduler (PRO) Module. You can, nonetheless, determine the validity of the voting in the *Validity* area, which is treated further below.

Figure 463 Voting *Properties*

The screenshot shows the 'Voting Properties' dialog box. It includes the following elements:

- Name:** A text field containing 'Chocolate'.
- Group:** A dropdown menu showing '/', with a 'Select' button to its right.
- Create Date:** Three dropdown menus for day, month, and year, showing '07', '06', and '2005' respectively.
- Limit access:** A checked checkbox.
- Allow access for following users:** A section with a list box containing '/admin' and a trash icon to its right.
- Add:** A button at the bottom right.

- 4 You can limit the access to the voting to certain users by using the *Limit access* button. You are then able to add users by using the *Add* Button.

Note: This function is only available if the webEdition *User Management (PRO)* is installed

Figure 464 Revote Control

- 5 In the *Revote Control* area, you can determine whether, and in which intervals users may vote once more in a Voting. The setting *never* in the dropdownmenu means, that the user only may vote once, while the setting *always*, that he can voten as often as he wants to. In addition, there are the settings *1 day*, *1 hour*, *30 minutes* and *15 minutes*.
- 6 With the radiobuttons *By Cookie* and *By IP* you can determine, how the interval should be checked. The default setting is *By Cookie*. In this setting, a Cookie is set for the user, which enables the Voting Module to identify the user. The advantage of this method is that also Votes of different users from a company net which presents itself outwardly with only one IP can be evaluated. Also it prevents in this way that, if an user gets assigned a new IP , e.g., by a new dialing with his provider and thereby could vote anew. The disadvantage consists in the fact that some users could have deactivated cookies in their browsers. You can handle this threat by activating *By IP*, then have to count, however, on abovementioned disadvantages.

Figure 465 The Validity area

- 7 Enter now the *Validity* of your voting and set it to *Active*. When the validity has ended, no more votes will be counted.
- 8 Click now on the *Inquiry* tab to enter your question and answers
The Inquiry view is opened

Figure 466 Inquiry view

- 9 Enter your voting's question in the *Question* field
- 10 Enter the possible *Answers*; by clicking the "+" button, you can add additional answers.

Note: There have to be at least two possible answers

- 11 If you plan to create multiple versions of the question, e.g. to offer different language versions on your site, select Version 2, Version 3 ... from the dropdown menu , and enter the respective questions and answers.

Note: Pay attention please to the fact that with different (Linguistic) versions the single responses of the versions correspond correctly, because the result would be otherwise falsified!

- 12 Click now on the *Save* button
- 13 You have successfully created your voting

39.2 Vote groups

Vote groups serve the organization of your votings. Thus they can be organized thematically coherent in groups and be evaluated better or be displayed sorted on your page.

Procedure 80 Creating a Vote group

In the Voting Module window

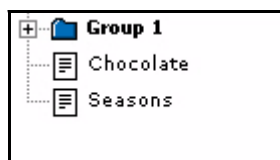
- 1 Select *Voting > New > Group* from the voting menu or *New Group* from the Quickstart
The Votinggroup window opens

Figure 467 Voting group

- 2 Enter a name for the new group.
- 3 Click the *Select* button to create the new group as a sub group of an existing one.
- 4 If the *User Management (PRO)* is installed, you can *Limit access* for certain users.
- 5 Click the *Save* Button

The system confirms the storage process. The newly created group is now displayed in the explorer menu to the left (see Figure 468)

Figure 468 New Group in explorer menu



- 6 The new group is created and you can now assign your votings to this group.

39.3 Vote result

Now it is time to look at the results of your votings.

Procedure 81 Display result***In the Voting Module window***

- 1 Select the desired voting from the explorer menu to the left
- 2 Click on the *Result* tab

The result view opens

Figure 469 Result view - Inquiry area

- 3 Click on the *Reset Scores* button to set the result to zero again. You may also alter the results manually and save them by clicking *Save*.

To be better able to evaluate the result of your votings also graphically, an export function for your data in the common CSV (Comma separated value) format is integrated in the webEdition Voting Module. As an example we will perform an export into a spreadsheet, here OpenOffice.

Procedure 82 Export the results into a spreadsheet***In the Voting Module***

- 1 Select the desired voting from the explorer menu to the left.
- 2 Click on the *Result* tab

The result view opens

Figure 470 Result view - Export area

Export

Export votings data to a CSV file (comma separated values).

Directory: / Select

File format: Windows format

Delimiter: ; {semicolon}

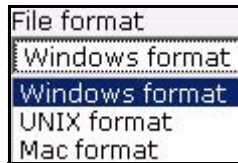
Enclose character: " {double quote}

Export

3 Now set your preferences:

- Click the *Select* button, to choose a directory for the export. Per default the export will be saved in the root directory (/)

Figure 471 Select file format for the Export

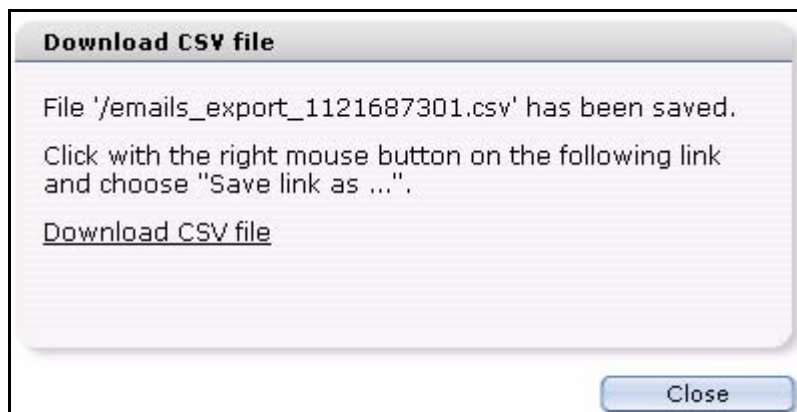


- Select a *File format* from the dropdownmenu which corresponds with your OS
- Set the *Delimiter* and *Enclose character* settings for the Export. Usually you can maintain the defaults (semicolon and double quote), as you can define them at the import in the spreadsheet.

4 When you finished your settings, click the *Export* button

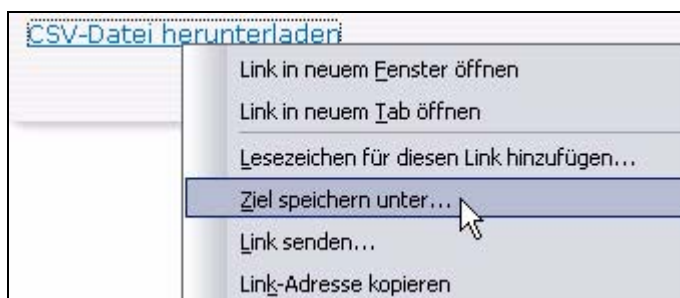
The window Download CSV file opens

Figure 472 Download CSV file



5 Use your right mouse button to click on the link and save the CSV file on your local hard drive

Figure 473 Save CSV file



Note: This procedure depends on your OS and browser; in our example, we use Mozilla Firefox on a Windows XP Operating System

6 Select a filename and set the file extension to .csv (siehe Figure 474)

Figure 474 Setting filename

- 7 Click on Save
- 8 Open the file in your spreadsheet (in our example we use OpenOffice)
- 9 Select the import options according to the choices you made during the export (see Figure 475)

Figure 475 CSV-Import in Open Office

Import

Zeichensatz: Westeuropa (Windows-1252/WinLatin 1)

Ab Zeile: 1

Trennoptionen:

- ☐ Feste Breite
- ☒ Getrennt
 - ☐ Tabulator
 - ☐ Komma
 - ☐ Andere
 - ☒ Semikolon
 - ☐ Leerzeichen
 - ☐ Felgtrenner zusammenfassen
 - Texttrenner: "

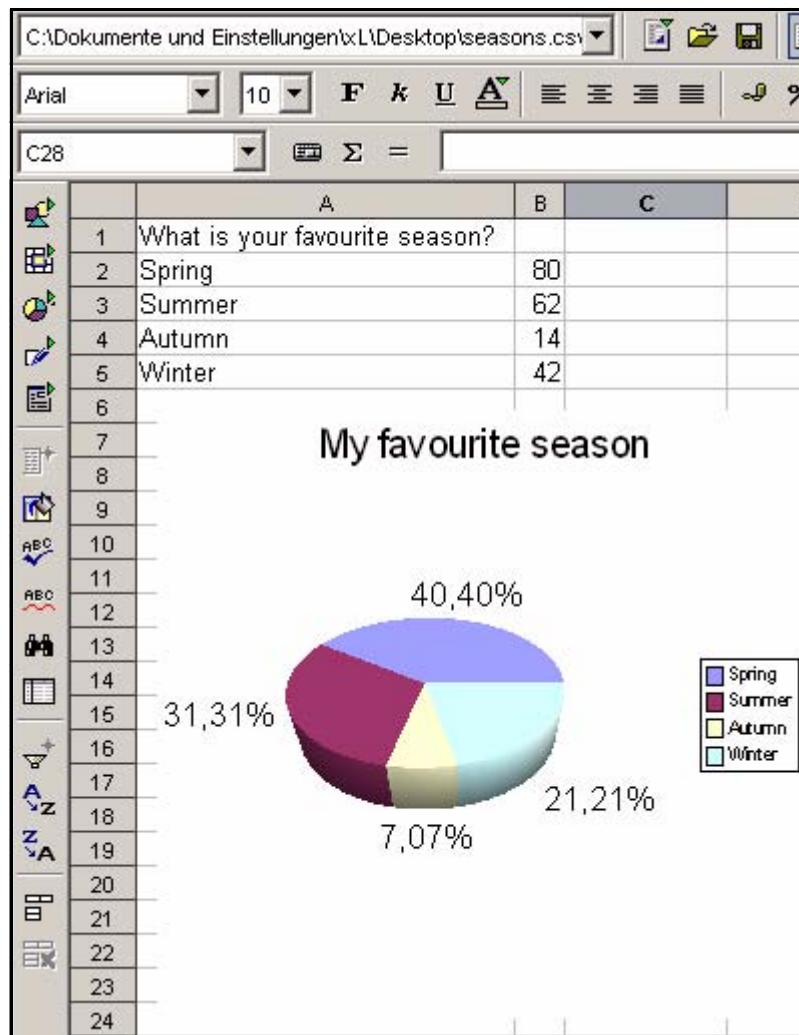
Felder:

Spaltentyp: Standard

1	Wie zufrieden sind sie mit den Produkten aus unserem Hause?
2	Sehr
3	überwiegend
4	ziemlich
5	gar nicht
6	keine Angabe

- 10 Click OK
The data of your voting is opened in the Open Office spreadsheet
- 11 Now you can easily save, process or evaluate graphically your data from the spreadsheet

Figure 476 Voting data in Open Office



12 This procedure is finished

Note: Analogously to the described approach the data takeover works of course in other software which can process CSV files as for example Microsoft Excel or similar

40 Practical examples for the template design

This chapter shows you how you can insert Votings in your page. You can find these examples in the directory *Demo* which comes with every webEdition installation from version 3.4 on.

The following topics are treated in this chapter:

- 40.1 "Creating a template for a Vote" on page 411
- 40.2 "Displaying the Vote result" on page 412
- 40.3 "Summary page for multiple Votes" on page 414

40.1 Creating a template for a Vote

To display a voting on a webEdition page, the template must contain a `<we:voting>` tag. The tag `<we:votingSelect/>` is used to select a voting. With the `<we:votingField>` tag, you can select single fields of a voting. `<we:answers>` appeals to the answers of the voting. Please refer to the template `/we_demo/voting/voting.tmpl` in the actual `we_demo`.

Example

```
<we:voting name="voting">
```

The Voting named "voting" starts here

```
<we:form id="240" method="post">
```

The result will be sent to the document with the id 240, after a vote has been cast. After a click on result, the document with the id 240 will be called, too

```
<we:votingSelect firstentry="----" submitonchange="true" />
```

A selectbox with your Votings is displayed for the editor to choose from

```
<input type="hidden" name="votingId" value="<we:votingField  
name="id" type="voting" />" />
```

In our example, the same page should be used for "Result" and "Send Vote". The result page thus must not be adjusted to which voting should be displayed. These are the possibilities: a vote was given and sent, then the fitting voting will be automatically selected. If no vote was cast, nothing will be sent, and thus the voting can not be detected automatically, thus the voting id is sent.

```
<h2><we:votingField name="question"></h2>
```

The Voting question is displayed

```
<we:answers>
```

```
<li><we:votingField name="answer" type="radio"
class="votingAnswer"><label for="<we:votingField name="id"
type="radio">"><we:votingField name="answer"
type="text"></label></li>
</we:answers>
```

The answers of the selected voting are displayed with radiobuttons for selection

```
<input type="submit" value="Send" />
<input type="submit" value="Result" />
```

The vote can be cast or the Result can be displayed

```
</we:form>
</we:voting>
```

Voting part of template finished

This displaysshow a simplified variantn free of layout, of the template *voting.tmpl* on which the document *voting.php* is based. It contains all tags which are necessary to give the possibility to the editor to be able to select a voting which was created with the Voting Module, simply in the document. See Figure 477 for a document which is based on the template

Figure 477 Simple Voting



40.2 Displaying the Vote result

Now we display the result of the above Voting on a result page. In this case, we keep to a simplistic variant of the demo template */we_demo/voting/result.php*.

Note: Please note the `<we:writeVoting />` tag has to be in the very first line of your template!

Example

```
<we:writeVoting />
```

Use this tag to write a cast vote into the Database

```
<we:ifVarEmpty match="votingId" type="request">
```

If no votingId is submitted (e.g. because no voting was selected), the default voting is displayed

```
<we:setVar to="request" nameto="votingId" value="6" />
</we:ifVarEmpty>
```

The default votingId is set to “6” here; this depends on your individual IDs

```
<we:voting name="voting" id="\$_REQUEST['votingId']">
```

The result of the above defined name “voting” and the submitted ID will be displayed here

```
Voting from: <we:votingField name="date" type="text"
format="d.m.Y" />
<br />
<br />
```

The set date of the Voting is displayed

```
<table class="voting" summary="This table contains the
Voting<we:votingField name="question" type="text" /> from
<we:votingField name="date" type="text" format="d.m.Y" />">
<tr>
<th colspan="2"><we:votingField name="question" type="text"
/></th>
```

The question is displayed

```
<tr>
<we:answers>
```

The answers are listed

```
<tr>
<td class="answer"><we:votingField name="answer" type="text"
/></td>
```

The text of the answer is displayed

```
<td style="width: 150px;"><div style="background: yellow; width:
<we:votingField name="result" type="percent" />%; height:
12px;border:1px solid red;" /></div></td>
```

Beams are generated which show the proportional distribution on the responses

```
<td><we:votingField name="result" type="percent" />%</td>
```

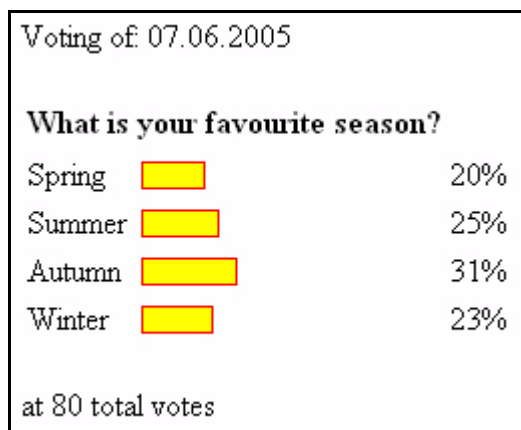
The percentage is displayed

```
</tr>
</we:answers>
</tr>
</table>
<br />
at <we:votingField name="result" type="total" /> cast votes
```

The total number of cast votes is indicated

```
</we:voting>
```

Here, too, the result is a simplistic version of the result page *result.php* from the webEdition Demo

Figure 478 Voting Result

40.3 Summary page for multiple Votes

Now we create a template with which we can display an overview of several Votings. Compare moreover to the template `/we_demo/voting/archive.tmpl` from the webEdition Demo

Example

```
<we:votingList name="voteList" groupid="0" rows="10" desc="true"
 subgroup="false">
```

With the `<we:votingList>` Tag you create a list of your votings. In this case with the groupid "0"; i.e. all votings. By means of groupid you can quite simply create overviews of groups of summarized Votings. Use this function to be able to display specially themed groups separately

```
<we:repeat>
<br />
Umfrage vom: <we:votingField name="date" type="text"
format="d.m.Y" />
<br />
<br />
<table class="voting" summary="This table contains the
voting<we:votingField name="question" type="text" /> from
<we:votingField name="date" type="text" format="d.m.Y" />">
```

The date of the voting is dispalyed

```
<tr>
<th colspan="2"><we:votingField name="question" type="text"
/></th>
```

Displays the question

```
<tr>
<we:answers>
<tr>
<td class="answer"><we:votingField name="answer" type="text"
/></td>
```

Shows the answers

```
<td style="width: 150px;"><div style="background: yellow;
width: <we:votingField name="result" type="percent" />%; height:
12px;border:1px solid red;" /></div></td>
```

Creates beams for the results

```
  |
```

The proportional distribution of the replys is indicated

```

</tr>
</we:answers>
</tr>
</table>
<br />
at <we:votingField name="result" type="total" /> cast votes

```

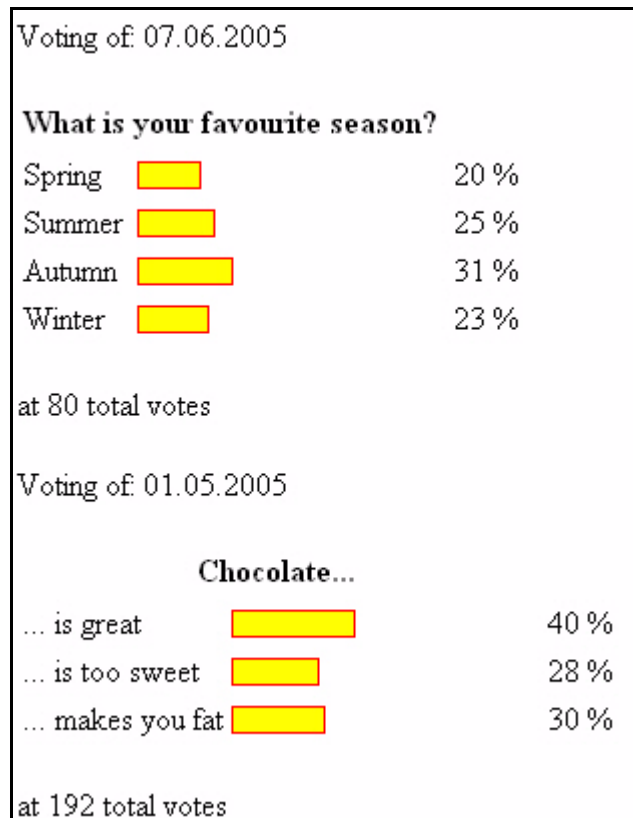
Shows the total number of votes

```

<br />
</div>
</we:repeat>
</we:votingList>

```

Figure 479 Voting summary



41 Workflow Module: Introduction

This introduction is intended to help you familiarize yourself with the webEdition Workflow Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Workflow Module. These topics are treated in the following sections:

- Section 41.1, "What is the webEdition Workflow Module?" on page 417
- Section 41.2, "Installation" on page 418
- Section 41.3, "General information and navigation" on page 418

ATTENTION

The Workflow Module requires the User Management Module (either the Standard or PRO version). You must install either the Standard or the PRO version of the User Management Module in order to use the Workflow Module.

41.1 What is the webEdition Workflow Module?

The webEdition Workflow Module allows you to create processes and to track all the steps required by you and your colleagues in the development of your web content.

Using the Workflow Module you can easily create sophisticated processes that streamline the administration of your content management operations.

You can automatically create authorization levels among the users within your organization, and assign to them their respective tasks. All tracking and notification functions are handled by the Workflow Module, removing the need for manual reporting using traditional methods such as E-mail, telephone or other tracking systems. The rights to create a workflow and to change documents in the workflow are controlled by the User Management Modules.

The Workflow Module complements the User Management PRO Module and the Task/Messaging Module.

41.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.webedition.de/english/downloads/Documentation.html>

Note: You can also use the webEdition "Live update tool", which is available on the webEdition home page at www.webedition.de.

41.3 General information and navigation

Once you have installed the Workflow Module, *Workflow* will appear as an option in the *Modules* drop-down menu (see Figure 480).

Figure 480 Modules drop-down menu



41.3.1 Opening the Workflow Module

From the *Modules* drop-down menu, click on *Workflow*. The main Workflow Module page opens showing the *Quickstart* screen (see Figure 481):

Figure 481 Workflow Module: Quickstart screen



Using the *Quickstart* screen, you have the option of going directly to a new workflow.

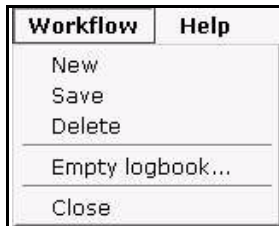
41.3.2 Workflow Module drop-down menu

The following items appear under the *Workflow* menu (see Figure 482, "The Workflow menu" on page 419):

- *New*. Use this command to create a new workflow process.
- *Save*. Select this command to save the workflow.

- *Delete*. Select this command to delete the workflow.
- *Empty logbook*. Use this command to modify what is saved in your workflow log files. Each document or object has a separate log. The quantity of data can become very large over time. With the *Empty logbook* function you can administer the contents of the log. For example, you can delete items that are older than a defined date. For further information about logbooks, see Section 43.8.2, "Using the logbook" on page 437.
- *Close*. Use this command to exit the Workflow Module.

Figure 482 The Workflow menu



41.3.3 The Workflow Module explorer menu

The Workflow Module is a stand-alone and independent element within the webEdition environment. Using the Workflow Module you define processes through which other elements in webEdition, such as documents, must pass.

The content of these documents and objects is not affected by the process of the workflow. Therefore, different documents and objects can be assigned to different workflows. You can create unlimited workflows. (In theory you can have as many workflows as documented objects, but ideally you define workflows and assign them to specified directories which are assigned to each workflow.)

Individual workflows are stored in webEdition and they appear in the explorer menu. A small "w" (signifying a "workflow") appears in the upper right corner of the directory (see Figure 483).

Figure 483 The explorer menu showing workflow items



If you click the plus "+" sign, all active documents in the workflow appear. Active documents are those which are not complete, and which have not yet been published.

If there are no documents or objects in a specific workflow, the workflow directory will appear empty.

41.3.4 The document *Information* view

The *Information* view allows you to check the status of your document. You can access the information about a document by going to the explorer menu, and clicking on the name of the document that you wish to examine. The system opens the *Information* page (see Figure 484).

Figure 484 The *Information* view

webEdition page: /we_demo/news/news_holiday.html

Properties Edit Information Preview

Information

ID 97

Type webEdition document

File size 4.33 KB (4.438 Byte)

Created 2001-09-27 - 19:27

Changed 2002-05-24 - 20:28

Last published 2002-05-24 - 20:28

Local path /srv/www/htdocs/web4/html/we_demo/news/news_holiday.html

HTTP path http://dan2.webedition.de/we_demo/news/news_holiday.html

Step	User1	User2	Worktime (H)	Time elapsed	Time remaining	End date
1	Administrator		10	0:0:2	9:59:58	2004-02-12 - 03:56
2	Writer	Illustrator	10			
3	Editor		10			
4	Quality		10			

Logbook

The *Information* page records the following data:

- file type and size
- creation, modification and publication dates
- the *Local path* (file location on the local computer), and *HTTP path* (www location)
- workflow matrix (For more details about the workflow matrix, see Chapter 42, "Workflow design theory" on page 423).

41.3.5 The edit view of the Workflow Module

There are two views in the Workflow Module: *Properties* and *Overview*, each of which is accessed by its respective tab.

41.3.5.1 *Properties* view

Using the *Properties* view, you can name your workflow, and assign directories and document types as well as categories and objects to it (see Figure 485).

Figure 485 The *Properties* view
41.3.5.2 Overview view

Overview. In the *Overview* view, you can define the form of the workflow as a matrix and the properties of each step in the workflow (see Figure 486).

Figure 486 The *Overview* view

The Overview area has four columns:

- The *Step* column shows the number of the respective serial step in the workflow.
- *AND / OR* signifies the Boolean operator and is used to define the relationship to adjacent parallel steps. Once you have more than one user assigned to a step, that is once you have parallel step, you must choose if the step is to adhere to AND logic (all named users must authorize the release of a document) or the "OR" logic (only one of the users needs to authorize the release).

- *Worktime (H)* is the time (in hours) allotted for the completion of the task.
- *User* describes the user who has been assigned a task.

42 Workflow design theory

The following chapter describe briefly the theoretical principles behind the workflow process under the following sub sections:

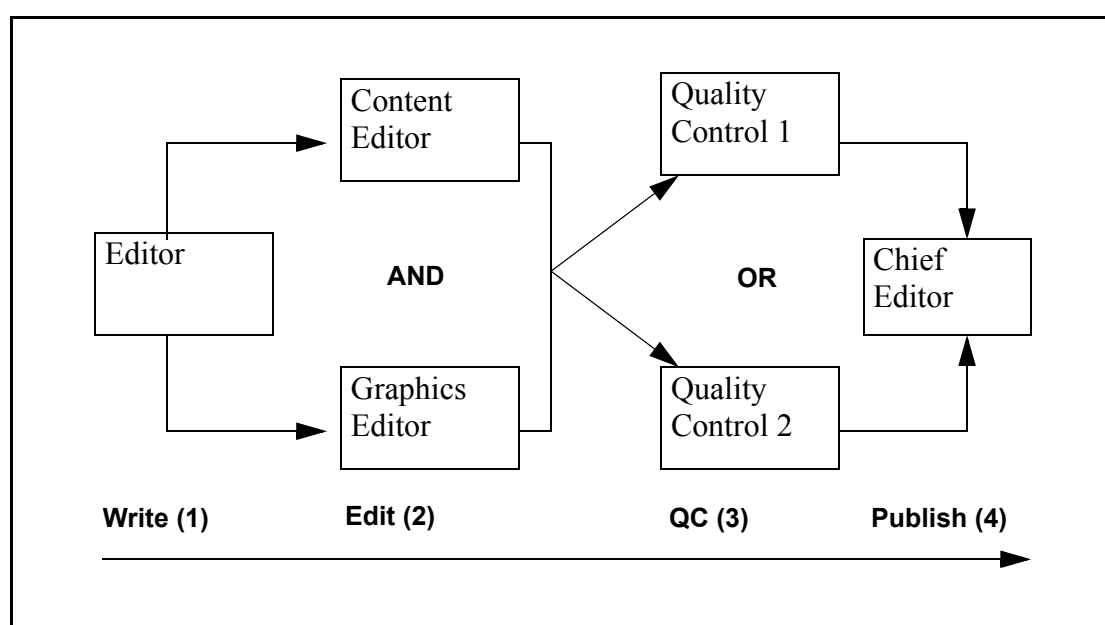
- Section 42.1, "What are serial and parallel steps?" on page 423
- Section 42.2, "Workflow design: a matrix" on page 424
- Section 42.3, "What kinds of documents can be assigned to a workflow?" on page 424
- Section 42.4, "Who can create a workflow?" on page 425

42.1 What are serial and parallel steps?

Your business may require processes which are complex, and which include serial steps, or a combination of serial and parallel steps. Serial steps occur in succession; parallel steps occur concurrently. See, for example, Figure 487, "Hypothetical workflow" on page 423.

Parallels steps have to be connected using Boolean Logic. Either you connect the two parallel steps with AND logic, in which case both people have to authorize the document before it is transferred to the next step. Or you may use OR logic, in which case only one of the two member needs to approve the document.

Figure 487 Hypothetical workflow



In the example in Figure 487, "Hypothetical workflow" on page 423:

1. The editor puts an article into the workflow.
2. The text goes to the content editor and the graphics editor. Because **AND** is used, both editors have to release the document before it can move to the next step.
3. In this step only one of the quality controllers needs to authorize the content (because **OR** logic has been selected).
4. The final decision is by the chief editor. The chief editor knows that the preceding steps have been accomplished according to the defined process. The chief editor has the right to publish the document.

42.1.1 User management

You can use the Workflow Module to define whether or not a person in the process has the permission to change a document. If the person to whom an item is sent does not have the permission to execute the request, the document is returned to the workflow for reassignment.

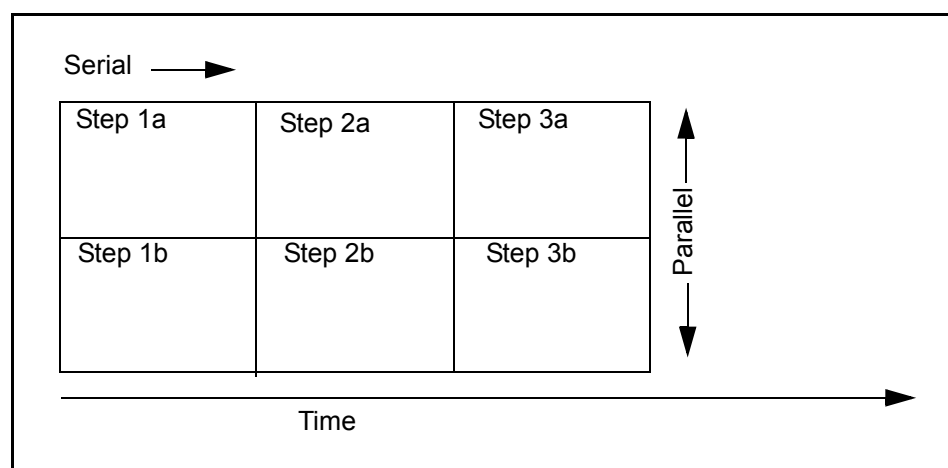
The Workflow module also allows you to generate an automatic E-mail to the person who has to review and release a work item.

42.2 Workflow design: a matrix

The workflow is designed like an n by m matrix.

In theory you can define n different steps in serial (along a horizontal axis, parallel to the time x) and m different steps in a parallel direction (along a vertical axis, perpendicular to the time x). You can extend the workflow in both directions: parallel and serial. For example, see Figure 488.

Figure 488 An example of a 3X2 matrix



42.3 What kinds of documents can be assigned to a workflow?

Two types of webEdition documents can be assigned to a workflow:

- documents (webEdition pages, HTML pages)
- objects from the Database Object Module.

Documents can be assigned to one of two workflow types:

- Directory-oriented workflow. The workflow that a document needs to run through is defined by the directory where the document is saved.
- Document type or a category. In this case the workflow applies to all documents of a given document type or category.

Objects-based workflows are always tied to an object class.

42.4 Who can create a workflow?

As noted in the introduction, the Workflow Module requires the User Management or the User Management PRO Module. Depending on the version of the User Management Module that you have installed, there are different options available to you with respect to who can create a workflow.

42.4.1 User Management Module (Standard version)

In the standard version only the administrator is allowed to create and change the workflow.

42.4.2 User Management PRO Module

User Management PRO Module allows you to assign to any user the right to create, change or delete a workflow (see Figure 489).

Figure 489 Permissions to define a workflow



For further information about the User Management Module and the User Management PRO Module, see the respective webEdition User Guides at the following URL:
<http://www.webedition.de/english/downloads/Documentation.html>

42.4.3 Who has the right to publish?

The following users have the right to publish:

- users that have the right to publish according to the User Management Module

Note: If a user has the right to publish according to the User Management Module, that person can publish at any time, thus finishing the workflow.

- users that are last in the workflow

Note: The user at the last step of the workflow can publish even if this right has not been defined in the User Management Module.

Your ability to govern the publication rights of users varies depending on version of the User Management Module that you have purchased.

The (standard) User Management Module offers the controls shown in Figure 490. You must determine on an individual basis, whether or not you wish to give a user the right to publish. You do so by clicking on the *User is allowed to publish* check box.

Figure 490 Publication permissions in the User Management Module

User: User1

Data

User data

First name: John

Last name: Doe

User name: User1

Password:

Permissions

☐ Administrator permissions

☒ User permissions

☐ Specify workspace

☒ User is allowed to publish.

Select

Save

The User Management PRO Module offers a suite of control features in addition to the *User is allowed to publish* check box (see Figure 491).

Figure 491 Publication permissions in the User Management PRO Module

User: User1

Data Permissions Workspace

Permissions

▶ Banner/Statistics Module

▶ Class and object permissions

▼ Control permissions

☐ The user is allowed to create new groups.

☐ The user is allowed to create new users.

☐ The user is allowed to save groups.

☐ The user is allowed to save users.

☐ The user is allowed to delete groups.

☐ The user is allowed to delete other users.

☒ The user is allowed to publish.

☐ The user is allowed to change the default extensions.

☐ The user is allowed to change the webEdition properties.

☐ The user is allowed to change passwords.

▶ Customer Management

▶ Import-/Export permissions

▶ Newsletter

▶ Scheduler

▶ Shop

▶ Super-Easy-Edit-Mode

▶ Work permissions

▶ Workflow

☐ Administrator permissions

Save

In the chapter that follows, we shall see how to create and manage a workflow.

43 Creating a workflow

This chapter describes the procedures for creating a workflow and working on documents in a workflow.

The rights to create a workflow and to publish a document are controlled by the User Management Modules. Some of the procedures described in this chapter, particularly those associated with creating a workflow, can only be completed if the a user has been assigned the appropriate permissions. For information on permissions, see Section 42.4, "Who can create a workflow?" on page 425.

The following procedures appear in this chapter:

- Section 43.1, "Creating a new workflow" on page 427
- Section 43.2, "Defining the steps of the workflow" on page 429
- Section 43.3, "Setting the worktime variables" on page 430
- Section 43.4, "Selecting the users in a workflow" on page 430
- Section 43.5, "Using the in Workflow option" on page 432
- Section 43.6, "Using E-mail messages within the workflow" on page 433
- Section 43.7, "Using the Task/Messaging Module with the Workflow Module" on page 433
- Section 43.8, "Examining the status of a document and using the logbook" on page 436
- Section 43.9, "Using the "Worktime exceeded" feature" on page 438

43.1 Creating a new workflow

Use the following procedure to create a new workflow.

Procedure 83 Creating a new workflow

At the Workflow drop-down menu in the Workflow Module main screen

- 1 Click *Workflow > New*.

The system opens the Properties view as seen in Figure 492.

Figure 492 Creating a new workflow: the *Properties* view

- 2 In the *Name* field of the *Properties* view, type the name you wish to give to your new workflow.
- 3 In the area under the *Name* field, define which documents or objects need to pass through the workflow prior to publication. There are three options: *Directory-based*, *Document type/Category-based*, or *Object-based*.

a If you wish to create a directory-based workflow, do the following sub-steps:

- i Click on the button beside the words *Directory-based*.
- ii Click on the *add* button in the file manager, and choose the document(s) that must pass through the workflow.

All documents in this directory need to pass through the workflow in order to be published.

Note: You can also use this area to edit a workflow at a later date. To delete a directory, click on the "trash can" icon. To delete all items, click on the delete all button.

b If you wish to create a document-type/category-based workflow do the following sub-steps:

- i Click on the button beside the words *Document type/Category-based*.
- ii Choose a document type from the drop-down menu.
- iii Click the *add* button under the *Categories* dialog box to access the category manager. The Category manager area opens and you can choose a category.

Note: You can also use this area to edit a workflow at a later date. To delete a category, click on the trash bin. To delete all items, click on the *delete all* button.

c If you wish to create an object-based workflow, do the following substeps:

- i Click on the button beside the words *Object-based*.

- ii Select which objects need to run through your workflow by clicking the *add* button. *The Object class manager window opens and you can choose the object class.*
- iii Click the *add* button under the *Categories* dialog box to access the category manager. The Category manager window opens and you can choose the category.

Note: You can also use this screen to edit a workflow at a later date. To delete an object class, click on the trash bin. To delete all items, click on the *delete all* button.

- 4 You have completed this procedure.

43.2 Defining the steps of the workflow

The following procedure describes how to define the steps for a new workflow.

Procedure 84 Defining the steps for a new workflow

In the Workflow Module Overview view

- 1 If you are not already in the *Overview* view, go to the *Overview* view, by clicking on the *Overview* tab (see Figure 493).

Figure 493 The Overview view

The screenshot shows the 'Workflow: New workflow' window with the 'Overview' tab selected. It displays a table for defining workflow steps. The table has columns for 'Step', 'AND / OR', 'Worktime (H)', and 'User1'. There is one row for Step 1 with a worktime of 10. Below the table are buttons for adding (+) and deleting (trash) steps. To the right of the table are checkboxes for 'Next step', 'Send mail', and 'Edit', along with a 'Select' button.

Step	AND / OR	Worktime (H)	User1
1	<input type="radio"/> AND <input checked="" type="radio"/> OR	10	

Buttons: +, trash, Select

Options: ☐ Next step, ☐ Send mail, ☐ Edit

- 2 Use the *Overview* view to define your workflow as an $n \times m$ matrix, and to define all functions of the workflow. Add steps to your workflow by doing the following:
 - a To extend the workflow by serial steps, click the plus "+" icon at the bottom left. *The workflow is now extended by one serial step (see Figure 494).*

Figure 494 Adding a serial step to a workflow

The screenshot shows the 'Workflow: New workflow' window with the 'Overview' tab selected. It displays a table for defining workflow steps. The table has columns for 'Step', 'AND / OR', 'Worktime (H)', and 'User1'. There are two rows for Step 1 and Step 2, both with a worktime of 10. Below the table are buttons for adding (+) and deleting (trash) steps. To the right of the table are checkboxes for 'Next step', 'Send mail', and 'Edit', along with a 'Select' button.

Step	AND / OR	Worktime (H)	User1
1	<input type="radio"/> AND <input checked="" type="radio"/> OR	10	
2	<input type="radio"/> AND <input checked="" type="radio"/> OR	10	

Buttons: +, trash, Select

Options: ☐ Next step, ☐ Send mail, ☐ Edit

- b To extend the workflow in a parallel step, click on the plus "+" icon on the upper right corner (see Figure 495).

Figure 495 Adding a parallel step to a workflow

Step	AND / OR	Worktime (H)	User1	User2
1	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	<input type="text"/> <input type="button" value="Select"/> <input type="checkbox"/> Send mail <input type="checkbox"/> Edit	<input type="text"/> <input type="button" value="Select"/> <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
2	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	<input type="text"/> <input type="button" value="Select"/> <input type="checkbox"/> Send mail <input type="checkbox"/> Edit	<input type="text"/> <input type="button" value="Select"/> <input type="checkbox"/> Send mail <input type="checkbox"/> Edit

3 You have completed this procedure.

43.3 Setting the worktime variables

After defining the steps in the workflow, you must assign a value to each step to indicate the time of its expected completion.

Procedure 85 Setting the worktime for a step

In the Workflow Module Overview view

- 1 In the *Overview* view (see Figure 493, "The Overview view" on page 429), enter a value in hours in the *Worktime (H)* box. This value represents the maximum duration that the document can remain in this step.

For example, if you enter 24, the document remains for 24 hours in this position of the workflow.

- 2 If you wish the task to move to the next step (regardless of its completion), after the expiry of the allotted worktime, select the next step check box. If the option has not been activated the document will be returned to the sender.
- 3 You have completed this procedure.

43.4 Selecting the users in a workflow

Use the following procedure to select the users that are to be associated with each step in a workflow.

ATTENTION

Only users registered in the webEdition User Management Module can release documents.

ATTENTION: User Restrictions

If a user attempts to open a workflow document, and that user is not part of the workflow, he/she will be denied access to the document. A user that is not related to a workflow can view a document, but that user cannot change the document.

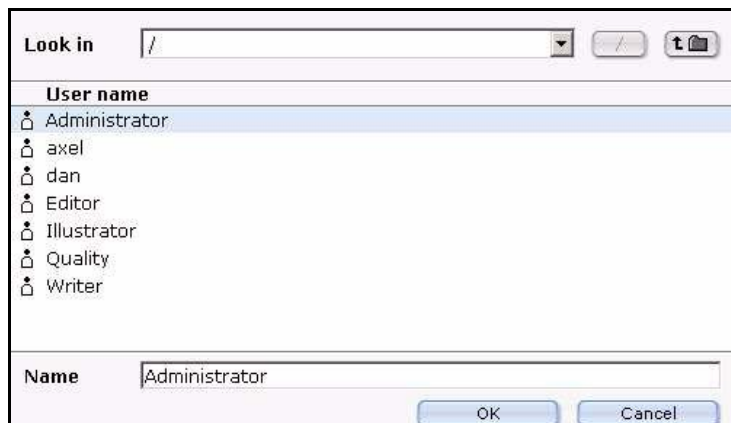
**CAUTION****Risk of lock out**

The user who creates a document is not part of the workflow. After he/she has put the document into the workflow he/she cannot make any changes to the document. If, however, that user has the right to publish, he/she can publish the document immediately.

Procedure 86 Selecting the users in a workflow***In the Workflow Module Overview view***

- 1 In the *Overview* view (see Figure 493, "The Overview view" on page 429), click the *Select* button to choose a user.

The user manager area appears (see Figure 496).

Figure 496 User manager area

- 2 Choose a user by clicking on the appropriate name from the list of users.

Note: If you do not want to add a user in a parallel step, leave the respective field empty. You must always choose a serial user.

- 3 Click the *OK* button.

The designated user appears in the workflow.

- 4 Choose additional users (if required) by clicking on the plus symbol at the top right side of the frame, and associate the users with their designated step in the workflow (see Figure 497).

Figure 497 Users in a workflow

Step	AND / OR	Worktime (H)	User1	User2
1	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Administrator <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
2	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Writer <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	/Illustrator <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit
3	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Editor <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
4	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Quality <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit

- 5 Select the *edit* check box to give a user the ability to make changes in the document or object associated with the workflow. If the *edit* check box is not activated, the user cannot change the document.
- 6 Select the *send mail* check box, if you want respective users to receive an E-mail as soon as a new document enters workflow or if the user has been sent a task.

The E-mail is always sent to the person who is next in the release process. The system takes the E-mail address from the User Management or User Management PRO Module.

ATTENTION

The right to publish is always controlled by the User Management or User Management PRO modules. The last user(s) in the process hierarchy automatically has the permission to publish even if that right has not been defined in the User Management Module. In addition, if a user of a previously defined level of the workflow has a right to publish, he/she can publish the document in advance if the document object lies in his/her user space.

- 7 Save the workflow using the Save button on the lower left corner of the workflow screen (see Figure 498).

Figure 498 Saving and activating a workflow

- 8 Activate the workflow by selecting the Workflow is active check box (see Figure 498, "Saving and activating a workflow" on page 432).

If the workflow is not activated, the workflow is still saved, but it is not yet active for the related documents and objects. You can still publish these related documents and objects without the workflow. An inactive workflow appears in red.

Once the option workflow is active, all related documents can only be published after they run through the workflow. An active workflow appears in black in the workflow explorer menu. Only the user of the last workflow step can release a document for publishing.

- 9 You have completed this procedure.

43.5 Using the *in Workflow* option

After creating the steps in a workflow and assigning users to it, you need to assign a document to the workflow. You use the *in Workflow* button, which appears at the bottom of the webEdition main screen (see Procedure 87).

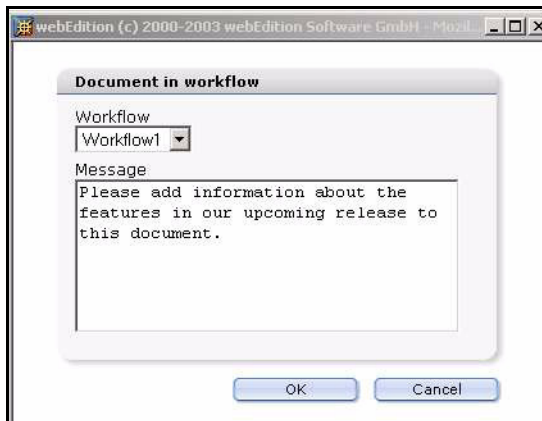
Procedure 87 Using the in Workflow option

In the Documents view of the webEdition main screen

- 1 Click on the *in Workflow* button to place the document or object into a workflow.

The Document in workflow screen appears as seen in Figure 499.

Figure 499 The Document in workflow screen



- 2 Select the workflow from the *Workflow* drop-down menu.
- 3 In the *Message* field, include a short message to the person who is next in the workflow.
The person to whom you have sent the message will see your message in his/her task list.
- 4 Confirm by clicking *OK*.
If you do not confirm with *OK*, the object does not go into the workflow. Once you have put the document into the workflow, the document appears in red in the explorer menu.
- 5 You have completed this procedure.

43.6 Using E-mail messages within the workflow

Communication is important when using a workflow. People must be informed of their role in the workflow. There are two ways to communicate with your colleagues. You can use the following methods:

- an external E-mail system
- webEdition messaging

As discussed in Section 43.4, "Selecting the users in a workflow" on page 430, all the people who have assignments in the workflow (including those who must check, forward, or release documents) have been designated to their tasks. You can define whether or not a user receives an E-mail describing their task (see Figure 497, "Users in a workflow" on page 432). Once you place a document into the workflow, the system generates a standard E-mail message form, which includes a text box in which you write your message. The system also enters the E-mail address (as it is recorded in the User Management Module) of the next person in the workflow to whom the message is to be sent.

43.7 Using the Task/Messaging Module with the Workflow Module

The webEdition Workflow Module requires the Task/Messaging Module to work. The Task/Messaging Module helps you to send messages to the user who has been assigned to work on a document or object in the next step of a workflow.

Once installed, the Task/Messaging Module produces two icons in the top right frame of the webEdition screen. The same icons are visible on the webEdition *Quickstart* screen (see Figure 500, "Task/Messaging icons" on page 434):



Figure 500 Task/Messaging icons

- the envelope icon signifying a message
- the check mark icon signifying a task

If you click one of the icons, the Task/Messaging Module opens.

The tasks and messages of the Task/Messaging Module are used like a private E-mail box. The tasks and messages are intended for, and accessible to, a specific user, who has been registered in the User Management Module.

For a detailed description of the Task/Messaging Module and how to use it, see the *The Task/Messaging Module User Guide* at the following URL:
<http://www.webedition.de/english/downloads/Documentation.html>

Using the Task file of the Task/Messaging Module, you can define all the tasks associated with a specific user. When a document is entered by an editor into the workflow, it appears in the task list of the next person in the workflow.

Procedure 88 How to process a task in the workflow

In the webEdition main screen

- 1 Once you log into the system you will see the number of unfinished tasks next to the task icon on the top right of your screen, or in the *Quickstart* screen as seen in Figure 500, "Task/Messaging icons" on page 434.

Click on the task icon.

The system automatically opens the Task/Messaging Module, and task window appears with a list of your open tasks (see Figure 501).

Figure 501 Task notification



- 2 Click the workflow task that appears in your list.

A description of the task and a notice alert appears in the lower part of the window. A link to the document or object that needs to be worked on is automatically generated as seen in Figure 502.

Figure 502 Details about a task

Task	
Subject	Workflow task
Deadline	2004-02-11 - 12:51
Status	0% <input type="button" value="100%"/>
Created by	webEdition (dan)
Assigned by	webEdition (dan)
Date of creation	2004-02-11 - 02:51
<p>There is a document waiting for you in the workflow.</p> <p>Please edit this article.</p> <p>Document: /we_demo/news/news_holiday.html</p>	

- 3 In the bottom frame of the page, click the *Document* link.

The document (or object) opens for editing. At the bottom of the page are three option (see Figure 503).

Figure 503 Declining, forwarding or saving a task

<input type="button" value="Decline"/>	<input type="button" value="Forward"/>	<input type="button" value="Save"/>
--	--	-------------------------------------

- 4 As a recipient of a task, you have one of three choices. Do one of the following sub steps:
- Work on the task. You can work on the task in the open edit window and save your changes by selecting the *Save* button. (Thereafter you can forward the task, see Step c).
 - Decline the task and send the task back to the originator.

- Select *Decline*.

The Decline document dialogue box opens (see Figure 504).

Figure 504 Decline document dialogue box

- Enter an explanation about why you are rejecting the task.
- Click *OK*, then go to Step 5.

When a task is declined, the system activates the task notification icon on the originator's screen. When the originator opens the task, he/she sees your message, as shown in Figure 505.

Figure 505 Notification of a declined task

Subject	Deadline	Priority	Status
<input type="checkbox"/> Workflow task	2004-02-11 - 12:51	5	0%
<input checked="" type="checkbox"/> The document has been returned from the workflow.	2004-02-11 - 17:43	5	0%
<input type="checkbox"/> Workflow task	2004-02-12 - 02:52	5	0%

Subject	The document has been returned from the workflow.
Deadline	2004-02-11 - 17:43
Status	0% <input type="button" value="100%"/>
Created by	webEdition (dan)
Assigned by	webEdition (dan)
Date of creation	2004-02-11 - 16:43

The document has been returned from the workflow.

I am unable to complete the assigned task. Please forward it to another writer/editor.

Document: /we_demo/news/news_webEdition_version3.php

c Forward the task.

After you have completed the work assigned to you, save your page, then select *Forward* to send the task to the next user in the workflow.

You receive an on-screen message from the system that the document has been passed on in the workflow. The next person in the workflow will receive a task notification.

5 You have completed this procedure.

Note: If you decline or forward the document or object, a value of 100% will appear in the *Status* column of the task notification screen and the task will be saved in the *Done* folder where all tasks are saved. Rejected tasks will be saved in the *Rejected* folder in the explorer menu.

43.8 Examining the status of a document and using the logbook

There are two ways to examine the status of a document within the Workflow Module. You can access data about the progress of a document in the workflow by

- checking the document *Information* view
- checking the log book

43.8.1 Using the *Information* view

The following procedure describes how to check the status of your document using the information view.

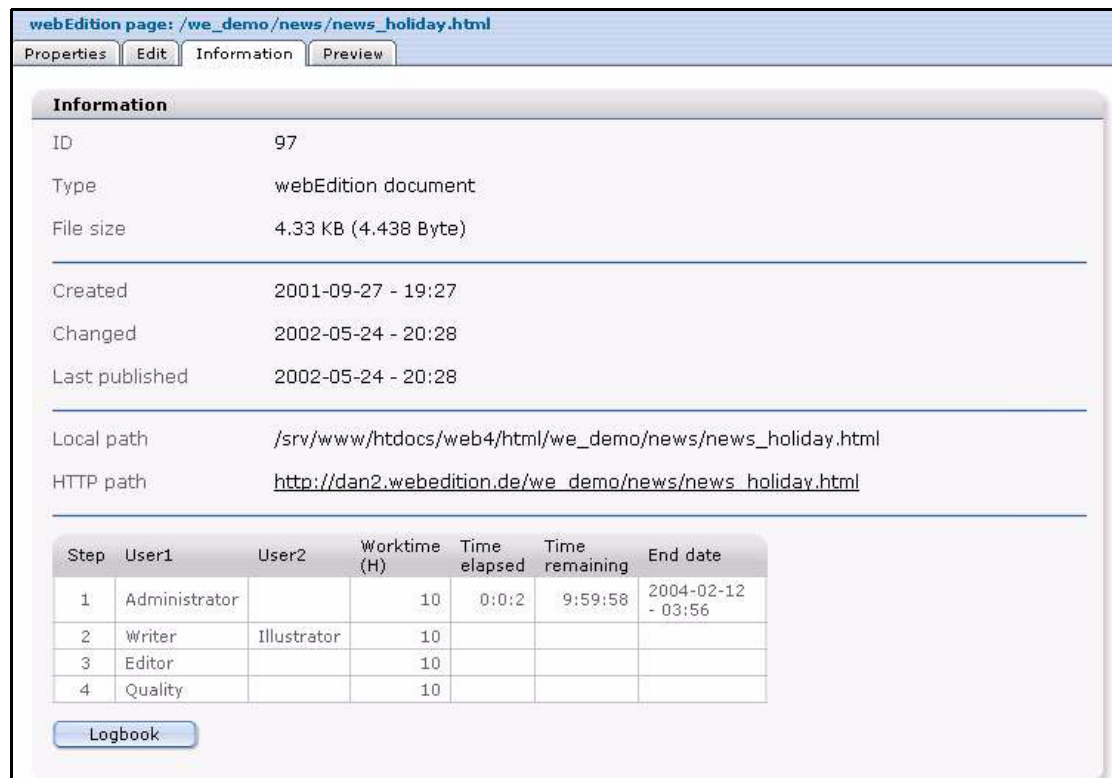
Procedure 89 How to check the status of a document

In the Workflow Module

- 1 Go to the explorer menu and click on the name of the document that you wish to examine.
- 2 Click the *Information* tab.

The system opens the Information view (see Figure 506).

Figure 506 The Information view



- 3 Examine the matrix at the bottom of the *Information* view for the status of the document.
The matrix tells you about the steps, the user names of those involved in the workflow and the allotted worktime.
- 4 You have completed this procedure. If you wish to see details and the comments entered by users about completed tasks, see Section 43.8.2, "Using the logbook" on page 437.

43.8.2 Using the logbook

The logbook is an archive of all workflow activities. It gives you information about all workflows so that you can always see who has done what and when. You can see the log report for each document by opening the *Information* view (as shown in Figure 506, "The Information view" on page 437) and selecting the *logbook* button at the bottom of the screen).

The logbook includes the following information in a tabular format (see Figure 507, "The logbook in the information view" on page 438):

- *Action.* This column describes what has happened to the document in the workflow.
- *Description.* This column provides a description of the task associated with the workflow step.

- *Time*. Time of the action in the workflow.
- *User*. The person who performed the activity.

Figure 507 The logbook in the information view

Action	Description	Time	User
Workflow is finished.		2004-02-11 - 17:35	- - (Quality)
User has forcibly approved document.		2004-02-11 - 17:35	- - (Quality)
User has approved document.	I have finished updating the webEdition logo for release 3. Please review and publish if it meets with your approval.	2004-02-11 - 17:32	- - (Illustrator)
Document has been inserted into workflow.	Please update the graphics to include our release 3 logo.	2004-02-11 - 17:22	webEdition - (dan)

43.9 Using the "Worktime exceeded" feature

The worktime exceeded feature informs users that they have exceeded the time allotted to an assigned task.

In order for the "Worktime exceeded" message feature to function, you must set up a PHP script on your server that will monitor the process of the tasks at regular intervals. You will find the script in the following directory: webEdition/we/include/we_modules/workflow/weWorkflowCron.php.

If you are using a UNIX server, you set up this script using a cron job (to do so see Procedure 90, "Creating a cron job on a UNIX server" on page 439). If you are using a windows server, use the Task Scheduler (to do so see Procedure 91, "Creating a planned task using Windows" on page 439).

Note: Not all Internet service providers offer these services. Contact your provider for availability.

ATTENTION

If you do not set up the cron job or scheduled task, the automatic message feature informing users of the exceeded worktime will not function.

43.9.1 Creating a cron job using UNIX

Prerequisites:

- The cron program must exist on the server
- you can run a PHP script via HTTP (that is, a text-based web browser or an HTTP downloader).

The cron program on a UNIX server can be lynx, wget, curl or a similar application. The cron job starts this program on a scheduled basis and gives it the URL of the PHP script. The program then starts the PHP script.

How to set up a cron job varies among Internet service providers. Many providers have a web interface. Contact your provider for further help, if necessary.

If your provider offers telnet or ssh or direct access via your terminal, you can set up the cron job by doing Procedure 90, "Creating a cron job on a UNIX server" on page 439.

Procedure 90 Creating a cron job on a UNIX server

In a UNIX terminal window

- 1 At the UNIX prompt, type

```
crontab -e
```

This command opens the default editor of the server (normally a vi editor).

- 2 Write the following string:

```
0,10,20,30,40,50 * * * * Program
http://www.YourDomain.de/webEdition/we/include/
we_modules/workflow/weWorkflowCron.php
```

In place of the variable, *Program*, type either lynx, curl or the name of the text-based browser or HTTP downloader you are using.

In the place of the variable, *www.YourDomain.de* variable enter your domain name.

Note: In this example, the 0...50 indicates that the cron job will run every 10 minutes.

- 3 Save.
- 4 You have completed this procedure.

43.9.2 Creating a planned task using the Windows Task Scheduler

With a windows server you need a program that runs a PHP script or HTTP. You can use Internet Explorer, or another external program, such as wget.

Note: We recommend wget for Windows. You can download it using the following link: <http://www.interlog.com/~tcharron/wgetwin.html>

Procedure 91 Creating a planned task using Windows

On your Windows desktop

- 1 Click on *Start > Settings > Control Panel*.
- 2 Click on *Scheduled Tasks*.
The task assistant opens.
- 3 Click *continue*.
- 4 A dialog appears where you choose the program you wish to use.
- 5 Select your program of choice (such as wget.exe).
- 6 Set up the time interval for the scheduled task.
- 7 Enter your user name and password, then click the *Continue* button.
- 8 Activate the check box for extended properties.
- 9 Click *finish*.

- 10 Open the weget application.
- 11 In the weget application, insert the webEdition URL into the wget parameter settings.
`http://www.YourDomain.de/webEdition/we/include/
we_modules/workflow/weWorkflowCron.php`
- 12 Click on the *Time plan* tab.
- 13 Click on the *Extended* button, and define the following options:
 - a Activate the *Repeat interval* check box.
 - b Adjust the interval (for example, 10 minutes).
 - c Set the duration to 24 hours.
 - d Click *OK*.
- 14 Click on the *Adjustment* tab, and select the time after which the task must end (for example, 1 minute).
- 15 Click *OK*.

The task is now defined and set up. It will appear in the *Scheduled Task* window.

44 List of terms and abbreviations

absolute reference

An absolute reference lists the path in webEdition starting with the HTML root directory. It always begins with a slash "/".

ASP

Active Server Pages.

BIN

Binary file. Also .bin.

Content image

See Layout image.

CSS

cascading style sheet.

Dynamic page generation

Dynamic page generation means that every time a page is called up, its content is retrieved from a database and inserted in the template. The program code of the page itself does not contain any text or calls to images; instead, it only contains a database reference. The advantage to this system is that internal links defined with we:tags remain current, even if the name of the linked page changes.

Dynamic pages are generally used for summaries and search queries.

Front-end

A term user to describe the interface used by an end user such as a web content editor. In webEdition, the front end is what the editor sees when updating a Web site. In contrast, the back end refers to the operation of the MySQL database which stores your web content, but which is transparent to the end user.

HTML

Hyper-text markup language.

HQX

Binhex file (Macintosh). Also .hqx.

JSP

Java Script Pages.

Layout image

webEdition differentiate between layout images and images/graphics that are dependent on content. Layout images have no connection to the content and only affect the appearance of the page. Layout images that are already present in the

templates do not have to be imported to webEdition, since they do not have to be managed using the database.

Unlike layout images, content-related images or graphics (such as product photos or charts) are managed and edited with the webEdition system in the same way as texts.

PDF

Portable documentation format file (Adobe). Also .pdf.

Relative reference

HTML editing programs such as Macromedia Dreamweaver or Adobe GoLive generally create relative references. Relative references create URLs that always depend on the current directory. For example: The image has been saved in: C:/My Documents/html/WebEdition/images/image.gif and the page to which you wish to link the image has been saved in: C:/My Documents/html/WebEdition/news/sports/index.htm. If C:/My Documents/html is the root directory on the Web server (Apache, Microsoft Internet Information Server), then the absolute link would be: /images/image.gif, whereas the relative link would be ../../images/image.gif

RTF

Rich text format file. Also .rtf.

SIT

Stuffit file. Also .sit.

Static page generation

When pages are generated statically, the actual entries are written directly to the program code when the page is saved. If the page is called up, it does not access the database. Should any changes be made to the page, the whole page will be re-saved. If any internal links defined in the template by we:tags change, all the pages based on this template must be re-saved. The advantage of static pages is that they do not need to access the database and can be loaded faster on high-traffic or slower servers. In addition, search engines always include static pages, whereas they occasionally omit dynamic pages.

XML

Extensible Markup Language.

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- <we:tag> See we:tags

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