

# Configuring FastForward for Web Content Management

5.7



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## CHAPTER 1

# Introduction

Configuring FastForward involves two major activities:

- Modifying the look and feel of the shipped FastForward applications to match your Web site. This process involves updating the Content Assembler applications shipped with Rhythmyx FastForward for Web Content Management with new templates to create the look and feel you desire.
- Creating new Site Folder structures in Rhythmyx to match the Site structure you want to publish, and adding Managed Navigation to provide navigation for your published content.

This document guides you through these processes.

In addition to these basic processes, you may also want to perform the following additional activities:

- Creating new Workflows to match your business processes.
- Implementing new Communities to match your organizational needs.
- Configuring publishing.

This document also includes a detailed walk-through of Rhythmyx to provide a more thorough introduction to the product and its features.

You must have an installed and functional Rhythmyx system before you can perform the activities described in this document. Installation of Rhythmyx is described in the document *Getting Started with FastForward for Web Content Management*. That document includes additional activities to validate that you have installed Rhythmyx correctly and that it is functioning as expected. You should complete all of the activities described in *Getting Started with FastForward for Web Content Management* before attempting any of the activities described in this document.

You should also be familiar with the *Rhythmyx Concepts Guide*. If you encounter any unfamiliar terms or concepts in this document, refer to that document to find an explanation.





## CHAPTER 2

# A Brief Introduction to Rhythmyx

Before proceeding with the tasks of customizing your Rhythmyx FastForward installation, you should become more familiar with Rhythmyx and its operations. This chapter provides a brief walk-through of the major functionality of the Rhythmyx Content Management System. We will add a several new Content Items to the Enterprise Investments Web site. We will add this new content to a new "Education" subsection of the "Investment Advice" section of the Enterprise Investments Web site.

## A Brief Introduction to Content Explorer

Begin the walk-through by logging in to Content Explorer.

To access Content Explorer, start your browser and enter the following URL into the address field:

```
http://localhost:9992/Rhythmyx
```

This URL assumes that the server is installed locally and that you are using the default Rhythmyx port. If you are accessing the server from a different machine, replace `localhost` with the name or IP address of that machine. If you chose a different port for Rhythmyx, replace `9992` with your preferred port number. Note too that the URL is case-sensitive, so you must capitalize the "R" in "Rhythmyx." (The case-sensitivity is a characteristic of the underlying Java code used in Rhythmyx.) If you enter the URL using a lowercase "r", Rhythmyx returns a message that A handler could not be found to handle the request for (`/rhythmyx/.xml`).

When you successfully access the server, your browser will display a login dialog. Use the user name *author1* and the password *demo* to log in to Content Explorer. (The user "author1" is a default user provided by Percussion Software that has authorship rights in Content Explorer.)

Content Explorer uses a Java applet. When installing the applet, your browser displays a security dialog. Click the [Yes] button to allow the applet to install on your browser.

When the applet finishes loading, your browser displays the Content Explorer window:

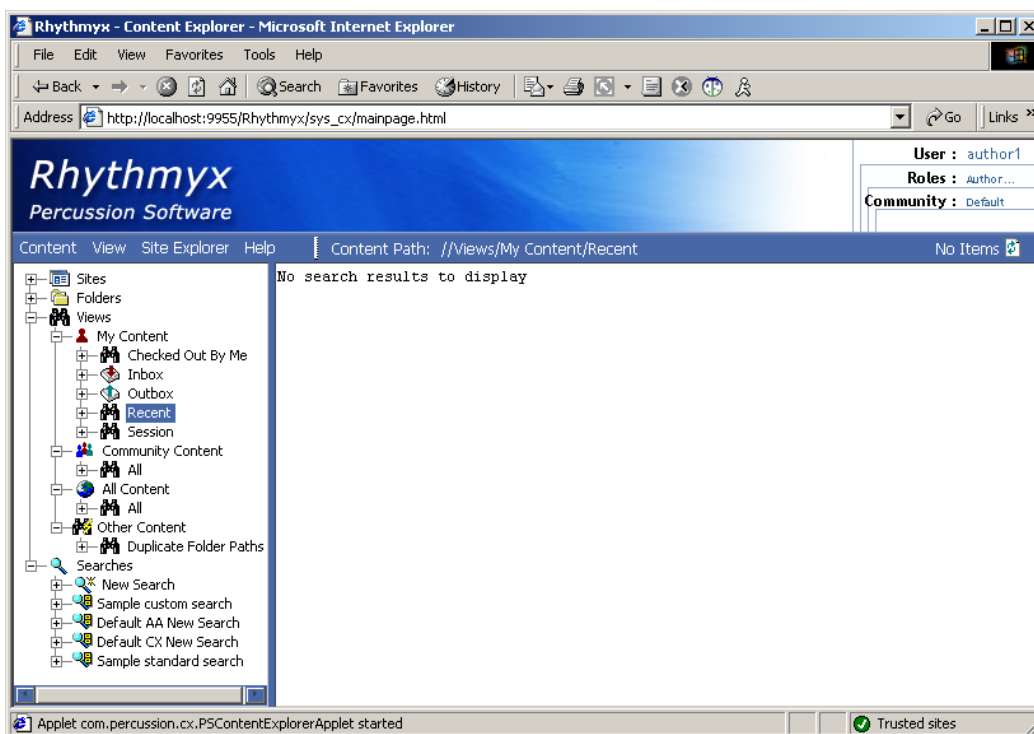


Figure 1: Content Explorer when you first log in

Content Explorer consists of four sections:

- the banner
- the navigation pane
- the content pane
- the menu bar.

## The Content Explorer Banner

The banner consists of the Rhythmyx logo and the login information at the far right.



Figure 2: Rhythmyx Banner showing user "author1" logged in to the Default Community

The login information consists of three pieces of data:

- User: The name of the user logged in to the system, in this case, author1
- Roles: The Roles into which the logged in user has been authenticated. If you hover your mouse over the value of the Roles field, Rhythmyx displays a popup listing all of the Roles into which the user has been authenticated. The value of the Roles field is also a link. You can click on this link to display a popup window with the user's list of Roles as well. The graphics below illustrate both options:

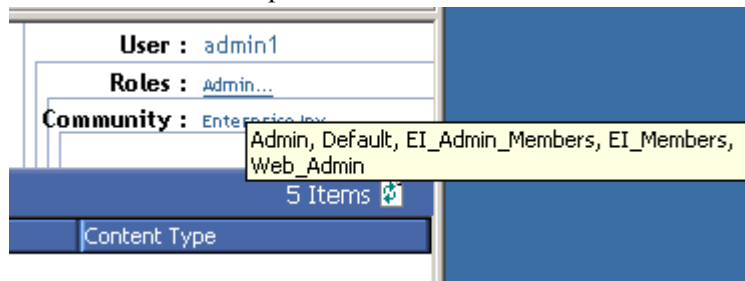


Figure 3: Role popup displayed when hovering the mouse over the value in the Roles field.

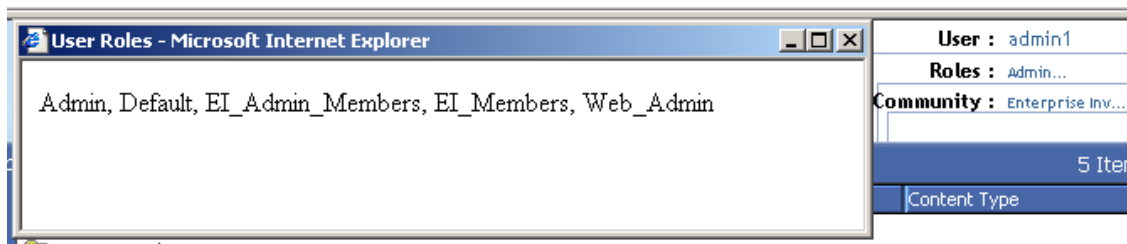


Figure 4: Role Popup Window displayed after clicking on the value in the Role field.

- Community: The Rhythmyx Community into which the user is currently logged. The author1 user is initially logged in to the Enterprise Investments Community, as illustrated in the screenshot above.

## The Navigation Pane

The Navigation Pane provides you with options for locating and organizing Content Items.

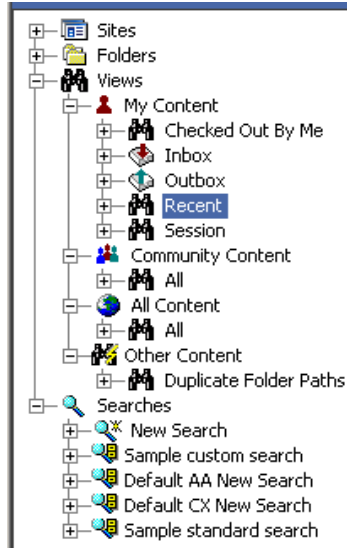


Figure 5: The Content Explorer Navigation Pane as displayed when first accessed

The Navigation Pane consists of four main Nodes:

- The Sites node is used to define Site structures and to assign Content Items to those Sites. When Rhythmyx publishes the content, it creates a directory structure on the target Web server identical to the structure you define under this node. Published pages are output to the directory parallel to the Content Explorer Site Folder to which they have been assigned.
- The Folders node consists of Folders used strictly to organize Content Items. The folder structures created under this node are not used in Publishing but for personalized organization.
- The Views node consists of a set of pre-defined queries that return lists of content. View fall into four categories.

- My Content Views

This category is the richest set of default Views. Views in this category list Content Items checked out to the logged user, Content Items assigned to the logged user, Content Items the user has worked on recently, and Content Items created by the user.

- Community Content Views

This category consists of Views that list Content Items only in the current Community of the user.

- All Content Views

This category consists of Views that can list all Content Items in the system, regardless of their Community or current Workflow State.

- Other Content Views

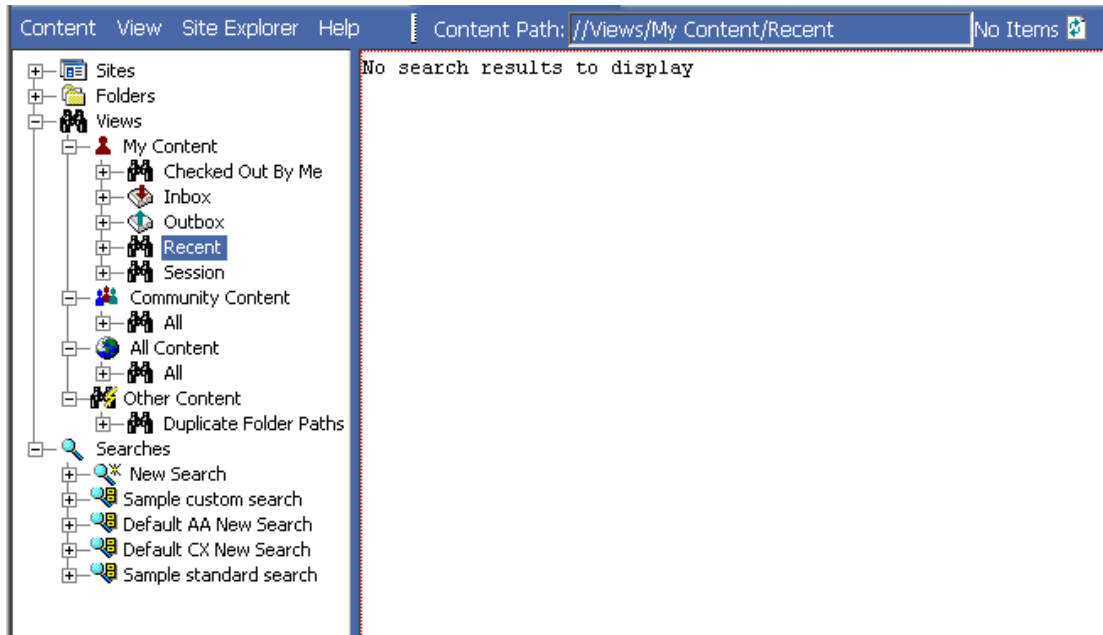
This generic category consists of Views that do not fit in any of the other categories.

- The Searches node consists of the New Search query and several pre-defined search queries. Searches are somewhat simpler than Views. Views can query based on system data not available to searches.

For more details about any of these nodes, see the Content Explorer Help, which you can access by choosing *Help > Content Explorer* from the Menu Bar.

## The Content Pane

The larger area to the right on the Content Explorer is the Content Pane.



*Figure 6: Content Pane as displayed when you first log in to Content Explorer*

When you initially log in to Content Explorer, the default navigation selection is always the Recent View. Since you have not logged in before and have not worked with any Content Items to this point, this View has no results, as illustrated in the graphic above, which shows the text "No search results to display".

Expand the Sites node, and select the Enterprise Investments Folder. Now the Content Pane lists the contents of this Folder. This Folder includes a number of Subfolders (such as About Enterprise Investments, Investment Advice, and Products and Services) and a couple of Content Items (EI Home Page and Enterprise Investments Internet Root).

## The Menu Bar

The Menu bar separates the banner from the Navigation and Content Panes.

The Menu bar consists of four menu options and the Content Path. The Content Path lists the Navigation path to the object currently selected in the Navigation Pane.

The following Menu options are available:

- Content

The Content Menu consists of options for managing Content. This menu includes three options:

- New

The New Menu consists of two submenus: Item and Folder. The Folder option is only available if you are in either the Site or the Folder node, or a Subfolder of one of these nodes. The Folder option allows you to create a new Folder. The Item option lists all Content Types for which the current user has access to create a new Content Item.

- Search

This option launches a new Search.

- <Site Name>

This option is only available if you have selected a Site Folder or a Subfolder. The name of this option is always the name of the Site node for the Folder you have selected. Submenu options available from this choice include options for changing the Display Format used in the Content Pane, options for creating new Content Items, and Access to the Folder Properties dialog so you can maintain the Properties of the Site (root) Folder.

- View

The View Menu includes two choices. The Refresh option refreshes Content Explorer. The Options choice activates the Display Options dialog, where you can modify the display settings for Content Explorer.

- Site Explorer

The Site Explorer option Activates the Site Explorer interface. This interface allows you to browse through content as if it were published to a live Site. All Content Items are available through Content Explorer, regardless of whether or not they are eligible to be Published.

- Help

The Help Menu includes two options. The Content Explorer option activates the Content Explorer Help. The About option activates the About Content Explorer dialog.

---

## Creating Content Items

Content Items are the basic units of content in Rhythmyx. A Content Item is usually a portion of a page, such as a block of text, an image, or a banner, header, or footer. In some cases, such as home pages, a Content Item may be a complete page, but more commonly, a Content Item is a portion of a page.

By defining content in such a granular manner, Rhythmyx provides users greater control over the content. You can use the same Content Item in multiple ways on different pages. Further, if editing is necessary, you only need to change the Content Item that needs to be modified, and do not disturb other parts of the page.

### Creating a Generic Page Content Item

Let us begin by creating a simple Generic Page Content Item.

You should always create new Content Items in a Folder so you can find them easily. Rhythmyx does not require you to be in a Folder when you create a Content Item, but if you do not create the Content Item in a Folder, you will need to search for it or use a View to find it. We will create our Content Item in a Site Folder.

In the Navigation pane, expand the Sites node, and select the Enterprise Investments Site Folder. Notice that when you select this Folder, the contents of the Folder are displayed in the Content Pane. Double-click on the "About Enterprise Investments" Folder. We will create our new Content Item in this Folder for now.

Percussion Software provides the content for this new Content Item, and several others we recommend that you create in the course of this walk-through. The content is provided in a set of .txt files in the <Rhythmyxroot>/Samples/ffsamples directory. If your Rhythmyx server is on a remote machine, you may want to copy the contents of this directory to your local machine. We are going to use the tuition.txt file to provide the content for our example Content Item. Open this text file in a simple text editor such as Notepad.

To create your new Generic Page Content Item:

- 1 In the Menu bar, choose *Content > New > Item > Generic*.

Rhythmyx pops up a blank Generic Page Content Editor:

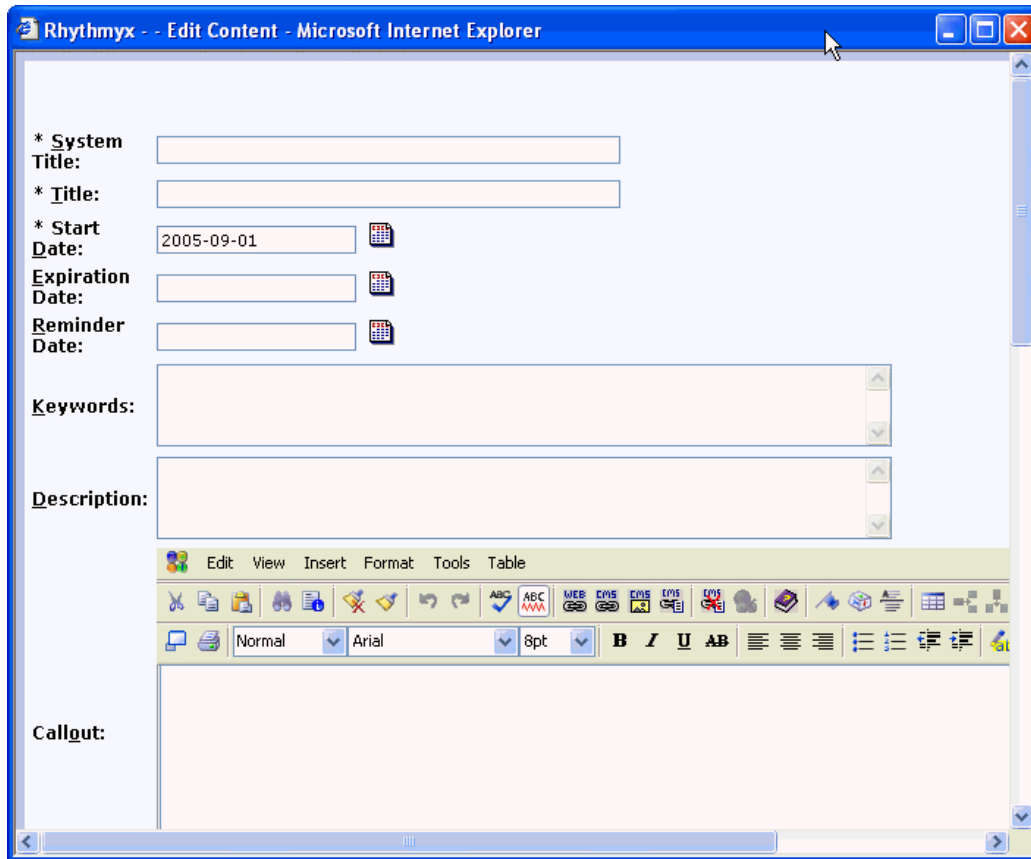


Figure 7: Generic Content Editor

- 2 Change to the Tuition.txt file, and copy the first line. Change back to Content Editor and paste this text in the **System Title** field. Paste it again into the **Title** field.  
Note that the **Start Date** defaults to the current date. Do not change the value in this field.
- 3 Change to the Tuition.txt file and copy the second line. Change back to the Content Editor and paste this text into the **Description** field.
- 4 Change to the Tuition.txt file and copy the third line. Change back to the Content Editor and paste this text into the **Callout** field.
- 5 Change to the Tuition.txt file and copy the text from the beginning of the third line to the end of the file. Change back to the Content Editor and paste this text into the **Body** field.
- 6 Click the [**Insert**] button. You will be briefly redirected to a page asking you to wait a moment while your Content Item is uploaded to the repository, then redirected again the Content Editor.

You have just added a new Content Item to the Rhythmyx Repository.



Towards the bottom of the window, the Content Editor now includes a set of links you can use to preview different Variants, or formatted outputs, of the Content Item. For example, if you click the P - EIGeneric link, Rhythmyx displays a window something like this:

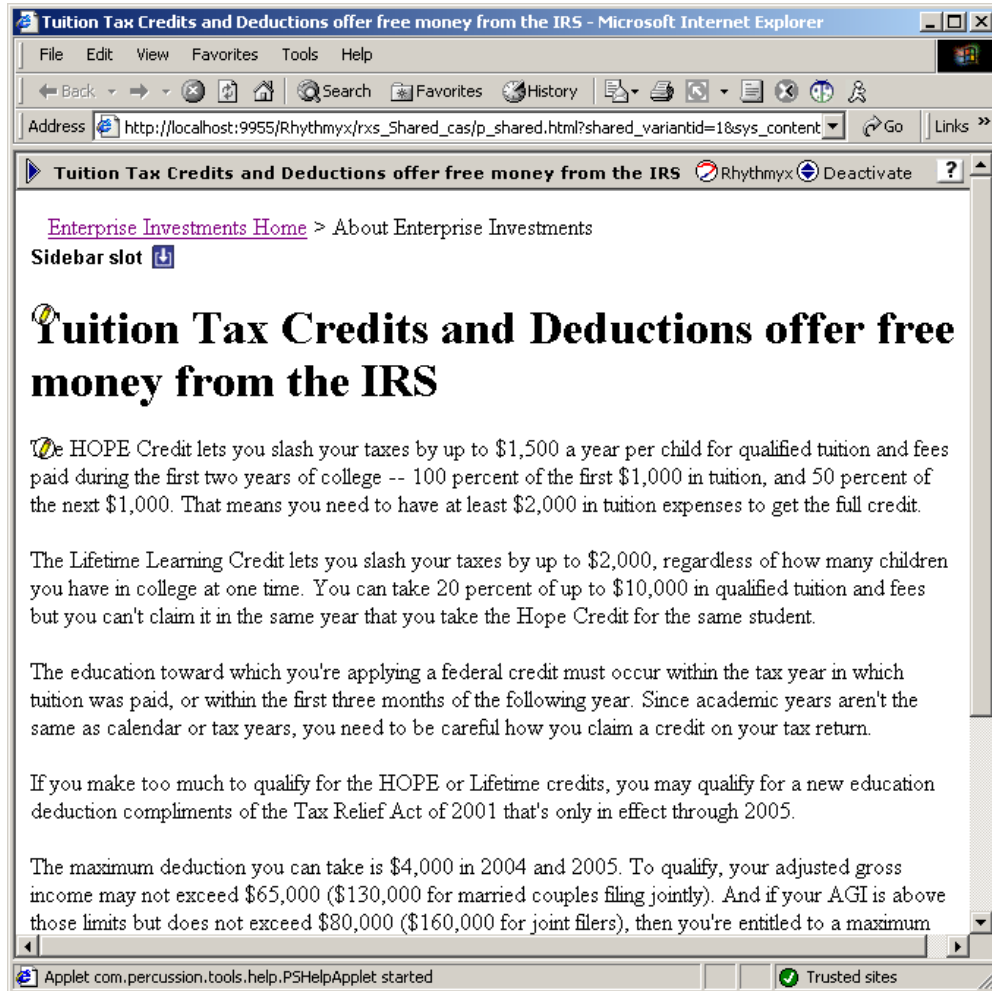


Figure 8: The P - Generic Variant of the new Content Item

This page illustrates how the Content Item would look as a published Web page. If you click the S - Title CalloutLink, you see a window something like this:

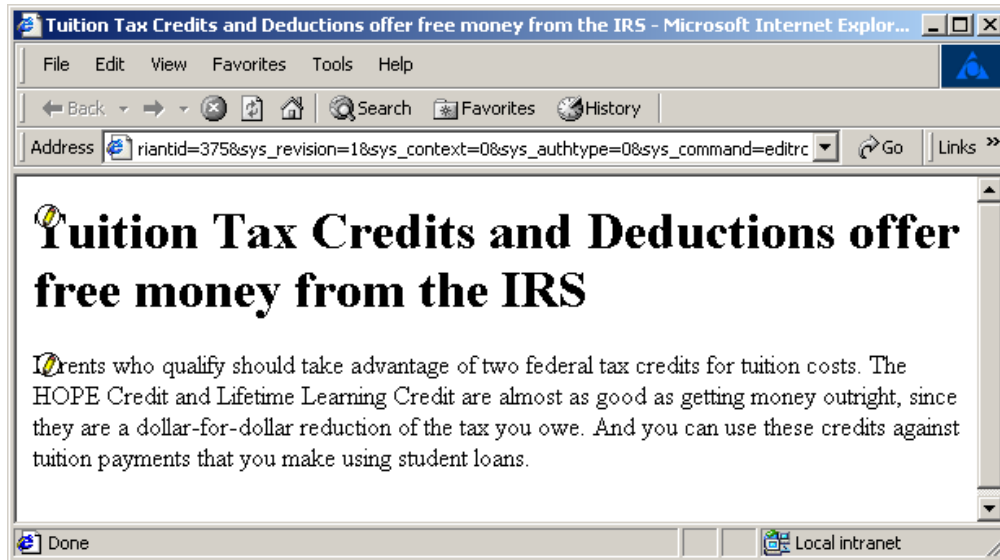


Figure 9: The S - Title Callout Variant of the new Generic Page Content Item

When you have finished reviewing the Variants available for the new Content Item, click the [Close] button to close the Content Editor. Note that the new Content Item, "Tuition Tax Credits and Deductions Offer Free Money from the IRS" has been added to the Enterprise Investments Folder.

## Creating a Generic Word Content Item

Rhythmyx has been designed with enough flexibility that you can connect to third-party tools as Content Editors. One of the most common tools used for creating content is Microsoft Word word processor. The Generic Word Content Type provides the option of entering and maintaining Content Items using Microsoft Word. We will enter Content from the sample Content File SavingForCollege.txt. You should still be in the Enterprise Investments Folder to create this Content Item

Note that before you can launch Word from Rhythmyx, you must update your security options. In Internet Explorer choose Tools > Internet Options:

- make your Rhythmyx server a trusted site (Click the [Sites....] button and in the Add this web site to the zone... dialog, enter *http://localhost* (or the name or IP address of the remote machine where your Rhythmyx server resides); and
- click the [Custom level...] button and on the Security Settings dialog, find the Download signed ActiveX controls entry. Either **Enable** or **Prompt** must be selected for this option.


To create a Generic Word Content Item:

- 1 In the Menu bar, choose *Content > New > Item > Generic Word*.

The Generic Word Content Editor uses an ActiveX control to launch Microsoft Word. Percussion Software has signed that this ActiveX control is safe, so click the [Yes] button when asked whether you want to run the control. After you click [Yes], Rhythmyx pops up a blank Generic Page Content Editor.

- 2 Change to the SavingForCollege.txt file, and copy the first line. Return to the Content Editor and paste the first line into the **System Title** field.
- 3 Change to the SavingForCollege.txt file and copy the second line. Return to the Content Editor and paste this text into the callout field.
- 4 Click the [Launch Word](#) link.

Rhythmyx launches Microsoft Word. Content Editing using Microsoft Word requires the use of Word Styles to mimic fields in Rhythmyx. These styles are stored in the GenericWord template. The template includes Word macros that convert the styles into Rhythmyx fields during the upload process. You can implement your own Word-based Content Editors. For details see the document [Implementing\\_Word\\_in\\_Rhythmyx5\\_5.pdf](#).

- 5 Change to the SavingForCollege.txt file, and copy the first line again. Switch to the instance of Word and paste it. Notice that the Style for this paragraph is PageDisplayTitle. The content of this paragraph will be entered into that field in the Repository.
- 6 Hit the <Enter> key on your keyboard. The new paragraph has the Style PageAuthor. In the Style drop list in Word, choose the style PageBody
- 7 Change to the SavingForCollege.txt file and copy from the beginning of the second line through the end. Past this text into the Word document.
- 8 In the Word button bar, click the Save to Rhythmyx button .
- 9 Word displays a File Name dialog. Enter the text *SavingForCollege*.

Word displays a confirmation dialog:

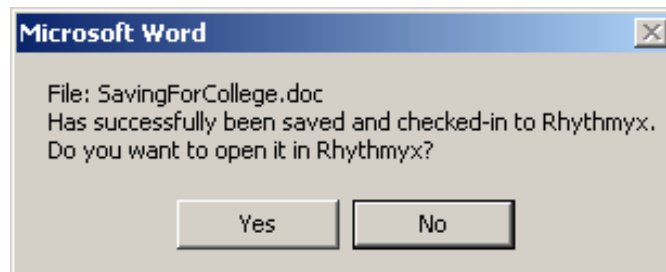


Figure 10: Confirmation dialog displayed when you have successfully uploaded your Content Item into Word

- 10 Click the [Yes] button. You will return to Rhythmyx, with the Saving For College Content Item displayed in the Content Pane. (The Content Item is located as the result of a background search, even though no search node is selected.)
- 11 Right-click on the Saving For College Content Item and choose *Edit* from the popup menu. Rhythmyx displays the Saving For College Content Editor.
- 12 Again, at the bottom of the Content Editor, you will find links to previews of Variants available for this Content Item. Click on these links to view previews of the formatted Variants available for the Content Item.
- 13 When you have finished, click the [**Close**] button.

## Creating a Category Content Item

Frequently, you will want to create lists of Content Items, such as a list of hot topics for the day, or a list of current press releases. In Rhythmyx, special Content Items, called Index Content Items, are used to create these lists. In some cases, you may want to generate these lists automatically based on specific criteria, such as all the press releases for the current month, or all the Content Items on a specific subject. Index Content Items that generate the list of Content Items automatically are called Automated Index Content Items (often shortened to "AutoIndex Items").

The FastForward implementation includes an Automated Index Content Type called Category. This Content Type is used to organize Generic Page Content Items into groups. We have created two Content Items about saving money for college. Within the structure of Enterprise Investments, these Content Items would belong to an Education Category.

To create the Education Category Content Item:

- 1 Select the Enterprise Investments Site Folder. (We want the new Content Item to be located in this Folder.)
- 2 In the Menu bar, choose *Content > New > Item > Category*.  
Rhythmyx displays the Category Content Editor
- 3 In the **System Title** field, enter *Education Category*. Copy the value and paste it into the **Title** field.
- 4 In the **Callout** field, enter the following text: *Saving for college is a challenge. We can help you find the best options for your needs.*
- 5 Copy the text in the **Callout** field and paste it into the **Body** field.
- 6 Click the [**Insert**] button.

When the Content Item has been inserted, Rhythmyx brings you back to the Content Editor. Again, you will find several links to previews of this Content Item. When you have finished checking these Variants, click the [**Close**] button to close the Content Editor.

## Adding Content Items to the Category

Since the Education Category did not exist when we created our Content Items, we could not assign them to that Category. Now that we have created the Education Category, we can assign our Content Items to it.

Let's assign the first Content Item, "Tuition Tax Credits" to the Education Category. To assign the Content Item to the Category:

- 1 Select the Enterprise Investments Site Folder.
- 2 Right-click on the Tuition Tax Credits Content Item, and choose *Edit* from the popup menu.  
Rhythmyx displays the Tuition Tax Credits Content Editor.
- 3 In the Categories section, check the **Education** checkbox.
- 4 Click the [**Update**] button.
- 5 Close the Content Editor.

## Creating an Image Content Item

Image Content Items are used to manage graphics used as content on Web pages.

Note that some graphics are used within the page layout itself. Examples include company logos and spacers used to define page layout. These graphics, which are referred to as *static images*, are not managed by Rhythmyx, but reside on the Web server so they can be included in the Published pages.

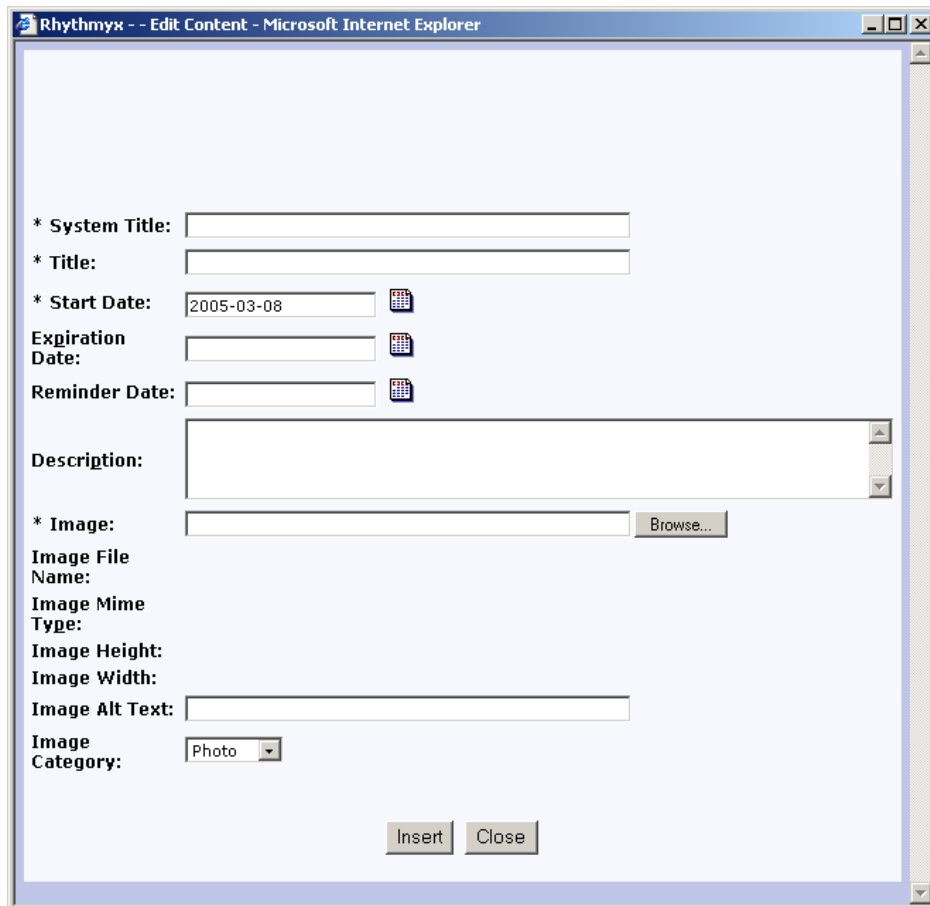
Content images, however, are managed as Content Items of the Image Content Type. Once an Image Content Item exists in the system, you can use it in any Slot that allows Image Content Types.

An example graphic (moneyroll.jpg) is included in the FastForward sample directory. If you are connecting to your Rhythmyx server from a remote machine, you might want to copy this file to your local machine.

To create the Image Content Item:

- 1 In the Navigation Pane, expand the Enterprise Investments Site Folder, then expand the Images Site Folder. Double-click on the People Folder.
- 2 In the Menu bar, choose *Content > New > Item > Image*.

Rhythmyx displays the Image Content Editor.



The screenshot shows a web browser window titled "Rhythmyx -- Edit Content - Microsoft Internet Explorer". The main content area contains a form for creating an image content item. The form fields are as follows:

- \* System Title:** [Text input field]
- \* Title:** [Text input field]
- \* Start Date:** [Text input field with value "2005-03-08"] and a calendar icon.
- Expiration Date:** [Text input field] and a calendar icon.
- Reminder Date:** [Text input field] and a calendar icon.
- Description:** [Large text area with scrollbars]
- \* Image:** [Text input field] and a "Browse..." button.
- Image File Name:** [Text input field]
- Image Mime Type:** [Text input field]
- Image Height:** [Text input field]
- Image Width:** [Text input field]
- Image Alt Text:** [Text input field]
- Image Category:** [Dropdown menu with "Photo" selected]

At the bottom of the form are two buttons: "Insert" and "Close".

Figure 11: Image Content Editor

- 3 In the System Title and Title fields, enter *Money Roll*.
- 4 Click the [**Browse**] button next to the Image field.  
Rhythmyx displays a browse dialog.
- 5 Browse to the <Rhythmyxroot>/Samples/ffsamples directory, select the file *moneyroll.jpg* and click the [**Open**] button.

Rhythmyx adds the path and filename you specified (for example, C:\Rhythmyx\Samples\FastForward\moneyroll.jpg).

- 6 On the Content Editor window, click the [**Insert**] button.

Rhythmyx uploads the file and refreshes the Content Editor window. Once the window has refreshed, the read-only fields **Image File Name**, **Image Mime Type**, **Height**, and **Width** include data.

- 7 Click the [**Close**] button to close the Content Editor

The new Money Roll Image Content Item has been added to the Folder.

Two additional sample image files are included in the FastForward Samples directory, *Girllookingatcamea.jpg* and *taxandglasses.jpg*. Add these to the same Folder.

---

## Working with Site Folders

As discussed earlier, Folders are the fundamental mechanism Rhythmyx provides for users to organize and navigate content. Folders in Rhythmyx are similar to Folders in Microsoft Windows. The major difference is that the folders in Windows are physical directories on the file system. Files in a folder in Windows are physically located in that Folder.

In Rhythmyx, Folders define virtual locations you can use to organize and navigate content. The Content always exists in the Repository, not in the Folders. The Folders merely contain pointers to the physical Content Items stored in the Repository.

The Navigation Pane includes two roots that contain Folders. The Sites Root is used to define Site structures. When you publish a Site, Rhythmyx creates a directory structure on the target server parallel to the Site Folder structure you have defined under this node. Note that you can create a several Sites under this node, each of which can be published separately. The Folders Root contains Folders that are used more generically for organization. The Folders under this root are not published.

Otherwise, Folders function identically regardless of the root to which they belong.

## Creating the Education Folder

We want to create a new subsection (Education) for the Investment Advice section of our Web site. This section will require a new directory to store the Web pages for the new section. In Rhythmyx, we create the new section, and the new directory, by creating a new Folder.

To create the new Education Folder:

- 1 In the Navigation Pane, expand the Enterprise Investments node, and select the Insurance Advice node.
- 2 In the Menu bar, choose *Content > New > Folder*.

Rhythmyx displays the Create Folder dialog.

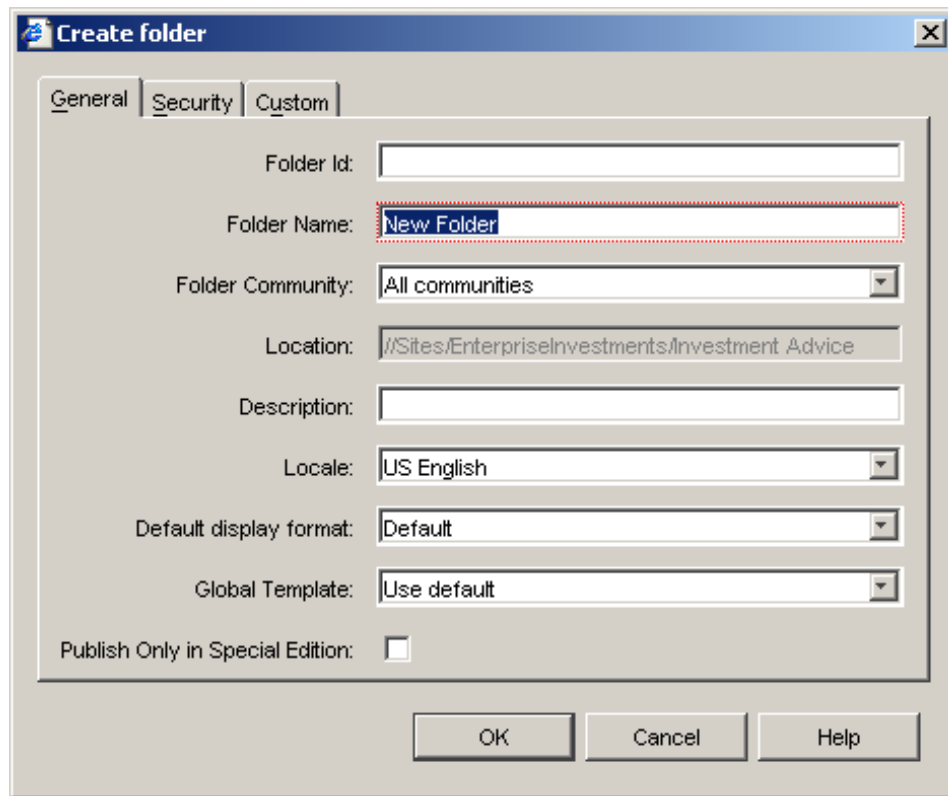


Figure 12: Folder Properties dialog, General tab

- 3 In the **Folder Name** field, enter *Education*. You can enter a free-form **Description** if you wish, but that is not necessary. Leave the defaults in all other fields.
  - 4 Click the [OK] button.
- Rhythmyx adds the new Folder under Investment Advice.

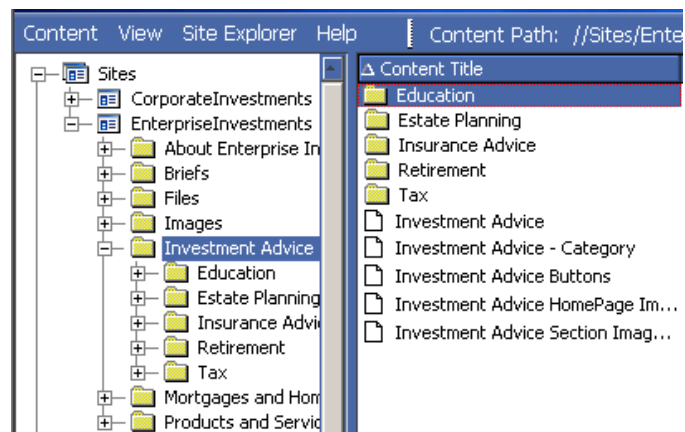


Figure 13: Content Explorer showing Education Folder added under the Investment Advice Folder



Double-click on the Education Folder. Rhythmyx displays the contents of the Folder in the Content Pane. Notice that this Folder already has a Content Item, Education, of the Navon Content Type. This Content Item is created automatically by the Managed Navigation functionality. It is used to generate navigation for the Web site automatically when it is published. For more about Managed Navigation see *Maintaining Managed Navigation for the Education Folder* (on page 41) and *Sites and Managed Navigation* (on page 73).

## Moving Content into the Education Folder

Since Web pages are published to the directory corresponding to the Site Folder in which they are located, we want to move the Content Items we previously created into the new Folder.

Let us move the Tuition Content Item first. To move the Tuition Content Item:

- 1 In the Navigation Pane, expand the Investment Advice Folder so you can see the Subfolders.
- 2 Select the Enterprise Investments Folder.
- 3 In the Content Pane, select the Tuition Content Item, and drag it to the Education Folder (as you drag the Content Item, you will notice a small dotted square below the mouse pointer; this square indicates that you are dragging the Content Item).
- 4 Place the mouse pointer over the Education Folder and release.

Rhythmyx pops up a dialog with the following options:

- Move
- As Link
- As New Copy



- 5 Select the *Move* option.

The Tuition Content Item is removed from the Content Pane.

6 Select the Education Folder. The Tuition Content Item has been moved to the new location.

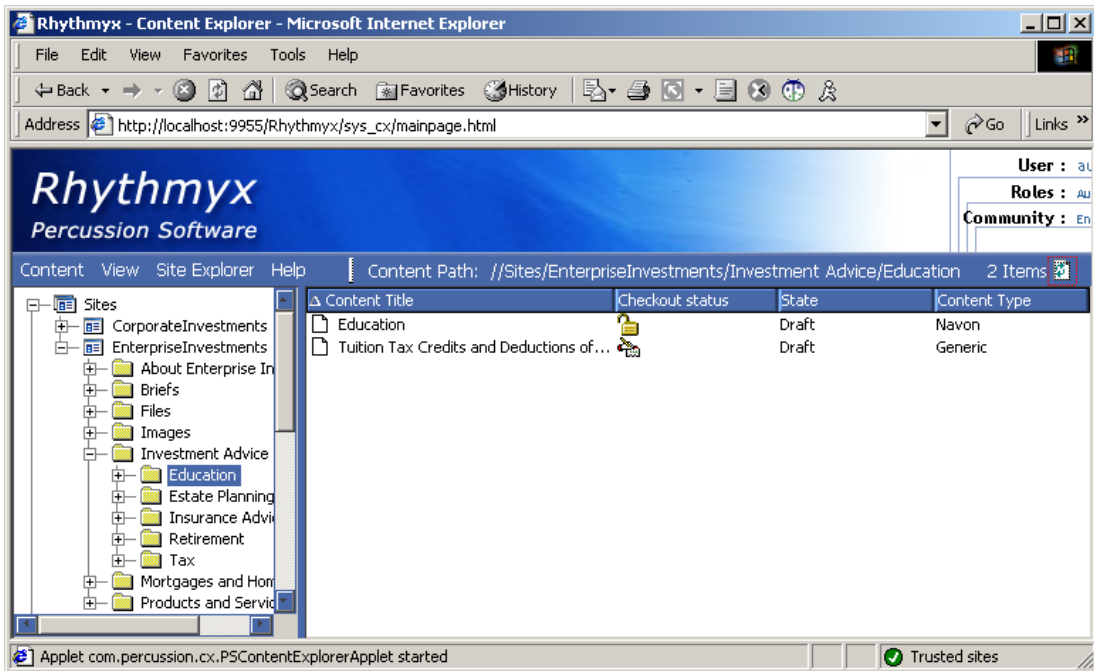


Figure 14: Content Explorer showing the Education Folder with the Tuition Content Item

You can move more than one Content Item at a time. Let us move both the Saving For College Generic Word and Education Category Content Items.

- 1 Select the Enterprise Investments Folder.
- 2 In the Content Pane, select the Education Category Content Item, then hold down the <Ctrl> key and select the Saving For College Generic Word Content Item.
- 3 Drag the mouse to the Education Folder and release. Choose *Move* from the popup menu. The Content Items are removed from the Content Pane.

- 4 Select the Education Folder. It should now resemble the following screenshot:

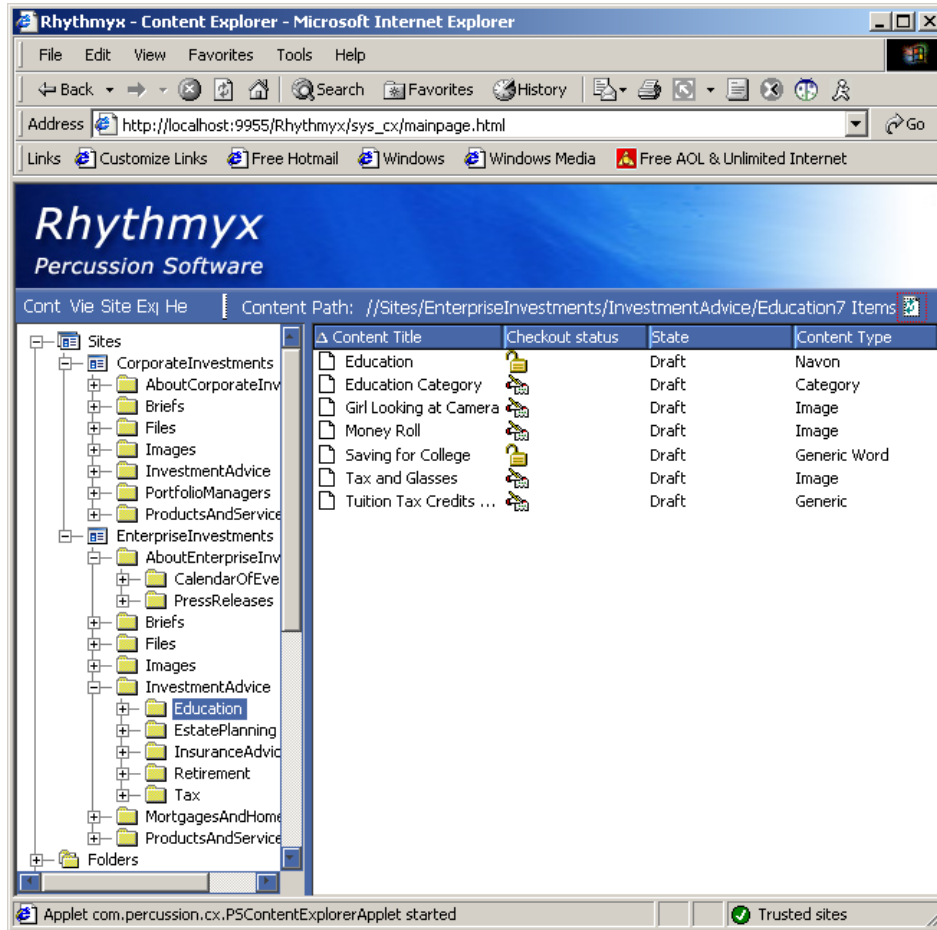


Figure 15: Education Folder with Current Content

## Adding Additional Content to the Education Folder.

Two additional sample txt files, Thingstoknowaboutsaving.txt and Section529.txt are included in the Samples directory. Use these to create two more Generic Page Content Items, "Important Things to Know About Saving for College" and "Section 529" Plans in the Education Folder. Be sure to check the Education Category when you create these Content Items.

When you have created these Content Items, the Education Folder should resemble the following screenshot:

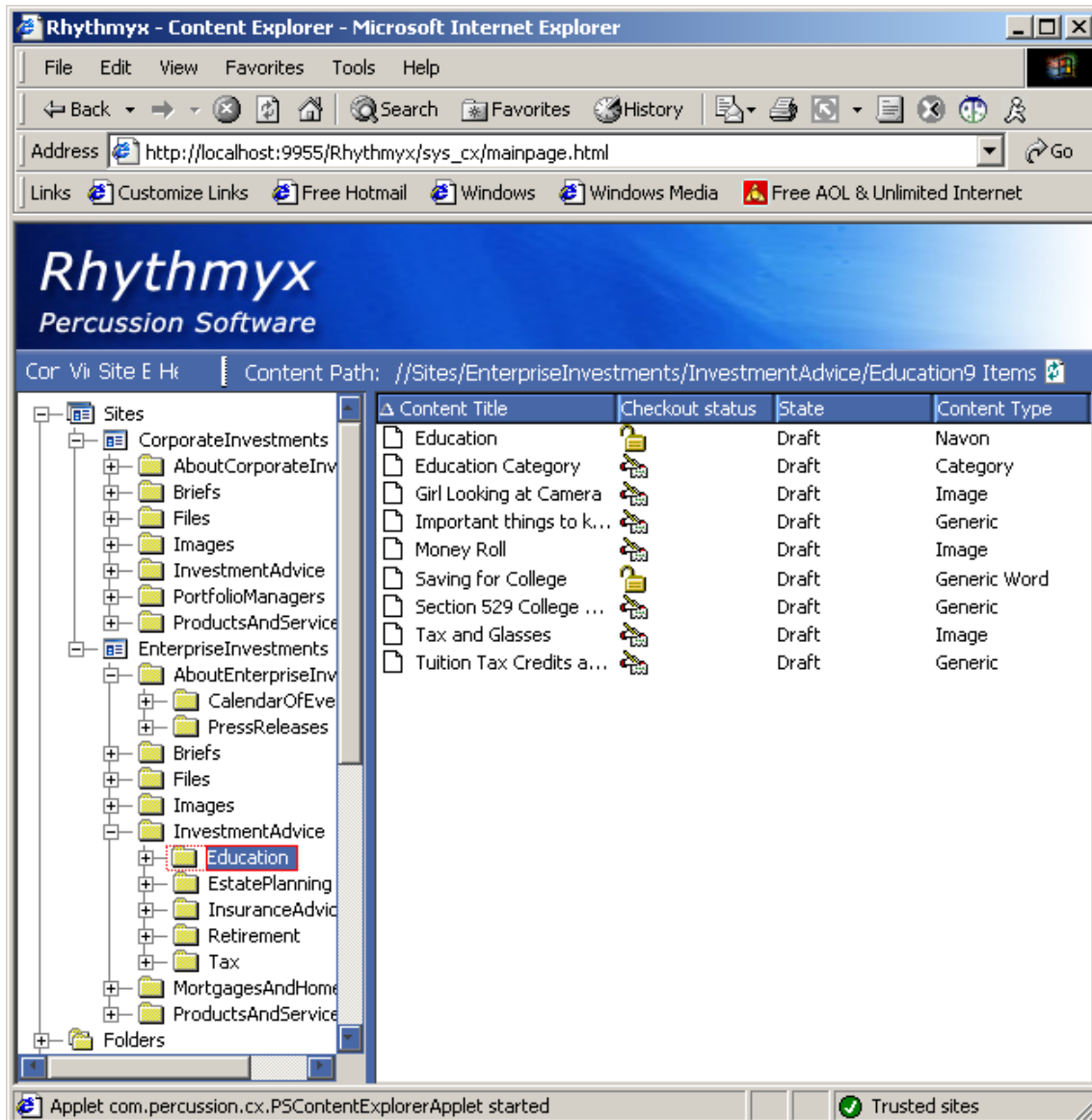


Figure 16: Education Folder with Content

---

## Active Assembly

Now that we have some Content Items, we want to create links between them. In Rhythmyx, the process of creating these links is called "Active Assembly". When you use Active Assembly to link one Content Item to another, you are creating an "Active Assembly Relationship" between the two Content Items.

Active Assembly Relationships are one category of associations between Content Items. Rhythmyx provides the ability to create a variety of associations between Content Items. Collectively, these associations are known as Relationships. For more details about Relationships in general, see *Implementing the Relationship Engine*.

An Active Assembly Relationship defines how one Content Item (referred to as the Dependent) will be included in another Content Item (which is called the Owner because it owns the Relationship) when the content is published. Active Assembly is used for one of two reasons:

- to embed one Content Item into another (typically used for graphics, but occasionally also used to embed text from one Content Item into another);
- to create a link from one Content Item to another (such as a hypertext link between two pages, or call to a binary file to be displayed to the user).

We will perform both types of Active Assembly, adding links between the pages we created and adding images to the pages.

## Adding Links to Other Generic Pages in the Sidebar Slot

On the P - Generic Variant, the Sidebar Slot is used to create links to other Content Items that contain content related to the topic on the current page. Let's create a link from the Tuition Content Item to the other new Education Content Items we created.

To create related content in the Sidebar Slot:

- 1 In the Navigation Pane, select the Education Folder.
- 2 Right-click on the Tuition Content Item and choose *Edit* from the popup menu. Rhythmyx displays the Tuition Content Editor.
- 3 Scroll to the bottom of the Content Editor and click on the P - EI Generic link.

Rhythmyx displays a preview of the P - EI Generic Variant of the Tuition Content Item in Site Explorer mode.

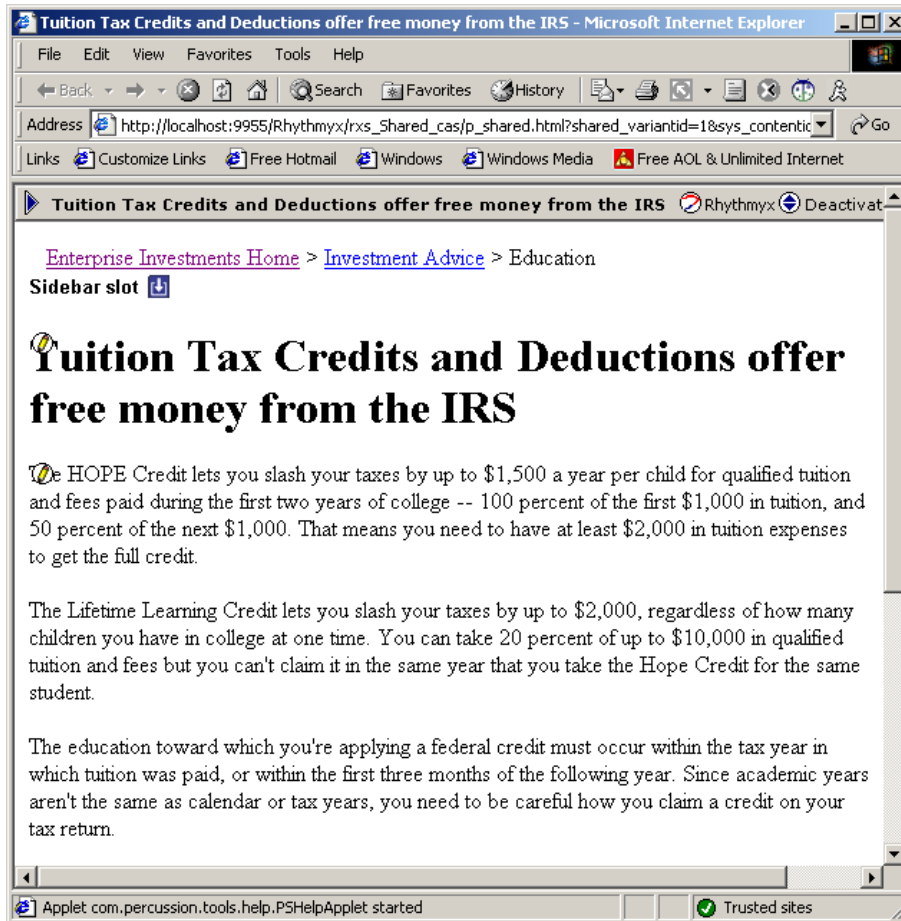


Figure 17: Tuition Content Item in Site Explorer Mode

In this mode, you can modify the related content in the Slots on this Variant.

- 4 Find the Sidebar Slot, and click the arrow, and choose *Search* from the popup menu.

Rhythmyx displays the Content Search dialog. Two versions of this dialog are available. If you installed the full-text search engine, you will see the following dialog:

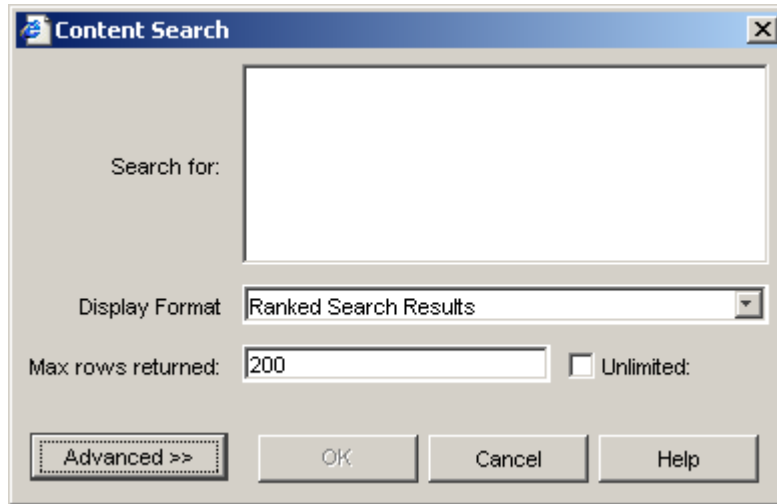


Figure 18: Full Text Search Engine dialog

If you did not install the full-text search engine, you will see this dialog:

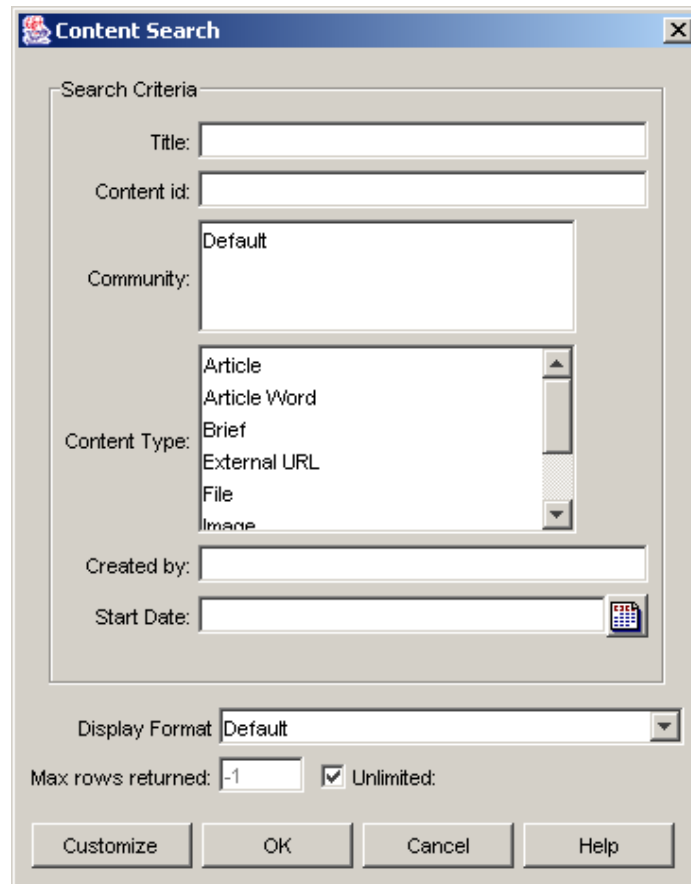


Figure 19: Database Search Engine dialog

- 5 If you have the Full-text Search engine, enter *college* into the **Search for** field. If you have the database search engine, enter **college** into the **Title** field. Click the [OK] button.

Rhythmyx returns the Related Content Search results:

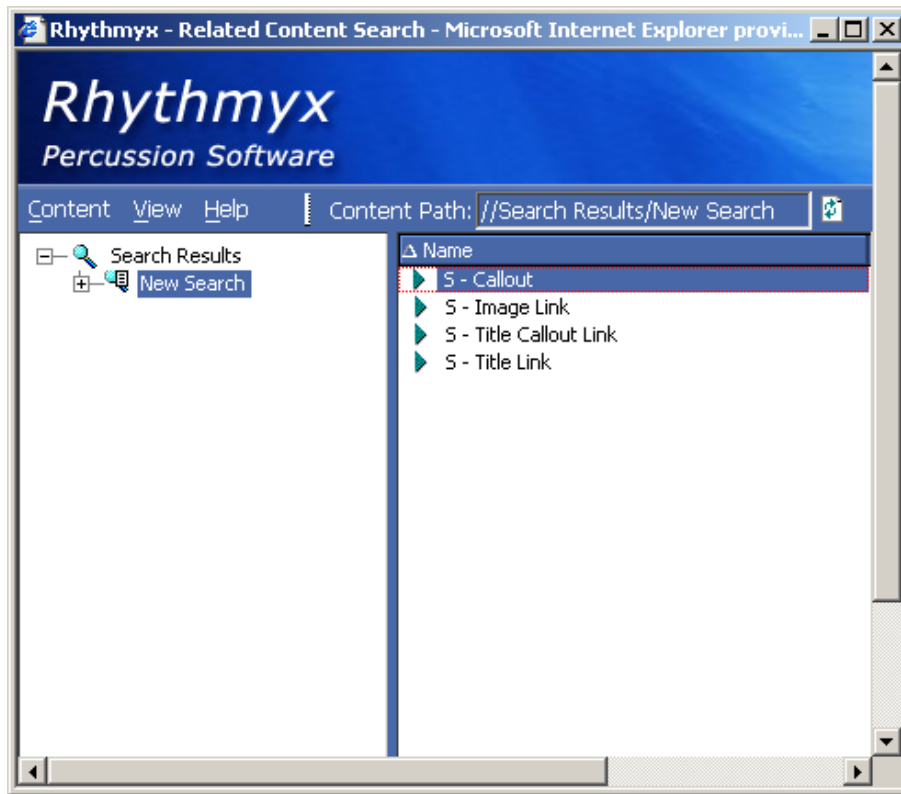


Figure 20: Related Content Search Results for the term "college"

Four snippets are available to insert into this Slot:

- S - Callout

This snippet inserts only the Callout field from the selected Content Item as plain text. It does not include a link.

- S - Image Link

This snippet inserts an image as a link to the specified page. The Image Content Item must be assigned to the snippet.

- S - Title Callout Link

This snippet inserts the Title and Callout fields from the selected Content Item as a link that redirects the user P - InternetGeneric Variant of the Item.

- S - Title Link

This snippet inserts the Title field from the selected Content Item as a link that redirects the user P - InternetGeneric Variant of the Item.

We want to create a link to the specified page using the Title and Callout of target Content Item, so we will use the S - Title Callout Link Snippet.



- 6 Double-click on the S - Title Callout Link node in the search results. Rhythmyx lists the Content Items available to be formatted using this Snippet.

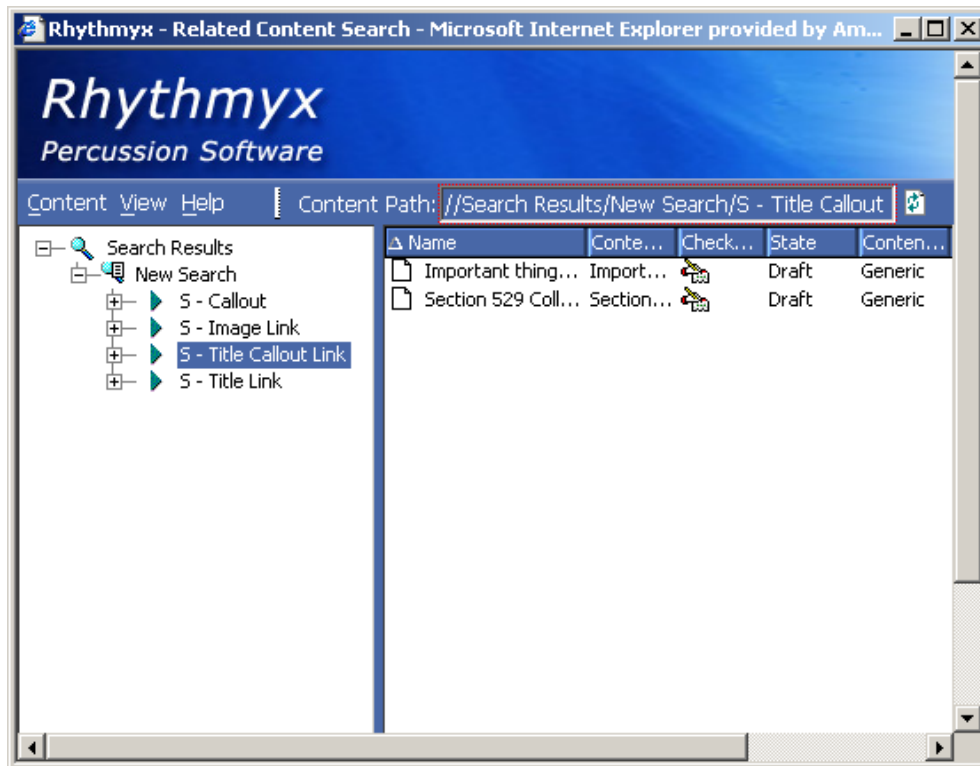


Figure 21: Search results showing Title Callout Link Snippets

- 7 Right-click on the "Important things..." Content Item and choose *Link to Slot* from the popup menu.

Rhythmyx refreshes the Tuition Site Explorer page, with the "Important things..." Content Item added to the Sidebar Slot. Note that the text is formatted as a link. If you click on the link, Rhythmyx will jump to the "Important things..." Page Variant.

- 8 Repeat Steps 5 - 10, adding the "Section 529..." Content Item. When you have finished, the Site Explorer page for the Tuition Content Item should resemble the following screenshot:

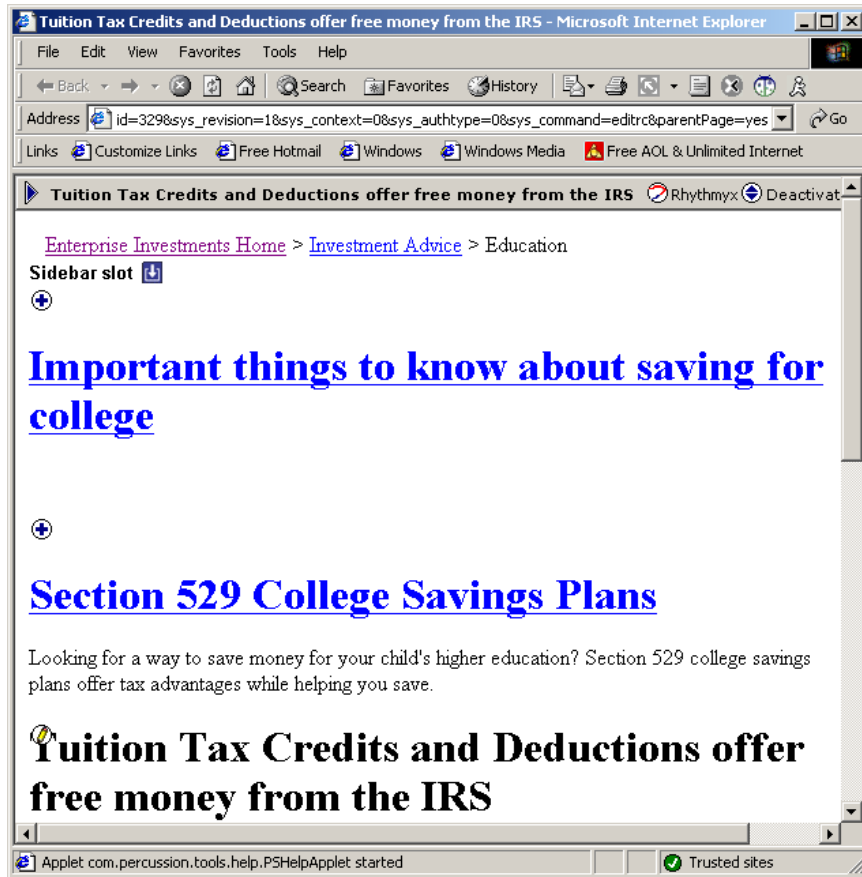


Figure 22: Tuition Content Item with Related Content in the Sidebar Slot

When you have finished, you can close the Site Explorer window for the Tuition Content Item.


## Adding an Image to a Generic Page

Now let us add an image to one of our Education Content Items. In this case, let us add an image to the rich-text **Body** field of the Content Item.

- 1 In the Navigation Pane, select the Education Folder.
- 2 In the Content Pane, right-click on the Tuition Content Item and choose *Edit* from the popup menu.

Rhythmyx displays the Tuition Content Editor.

- 3 Scroll down to the *Body* field, and place the cursor before the first character in the field.

- 4 Click the Insert Rhythmyx Image button .

Rhythmyx displays the Content Search dialog.

- 5 If you have the Full-text Search Engine installed, enter *glasses* in the Search for field. If you have the database search engine installed, enter *glasses* in the Title field. Click the [Search] button.

Rhythmyx displays the Search Results window.

- 6 Click the **Tax and Glasses** radio button. (If you want to see a preview of this Content Item, click the [Tax and Glasses](#) link.) Click the [Add] button.

Rhythmyx adds the graphic to the Body field.

- 7 Now let us format the graphic so it merges more smoothly with the text. Right-click on the graphic and choose *Picture* from the popup menu.

Rhythmyx displays the Picture Properties window.

- 8 In the Alignment drop list, choose *Left*.

- 9 Click the [OK] button.

The text will now flow around the graphic, similar to the following screenshot:

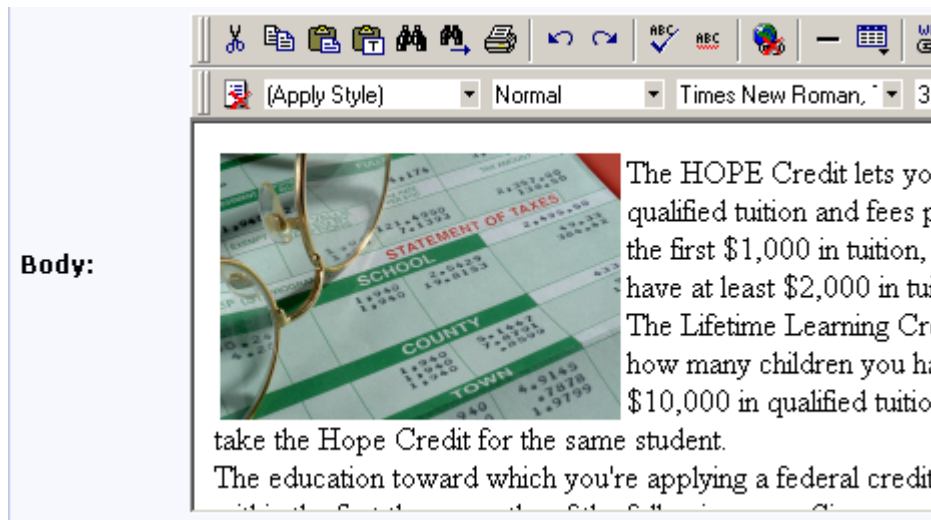


Figure 23: Content Item with Graphic

- 10 Click the [Update] button to upload the changes to the Repository.

- 11 When the changes have been uploaded, the Content Editor will refresh. To check your changes, scroll down to the Preview links and click the P - EI Generic link. The preview should resemble the following screenshot

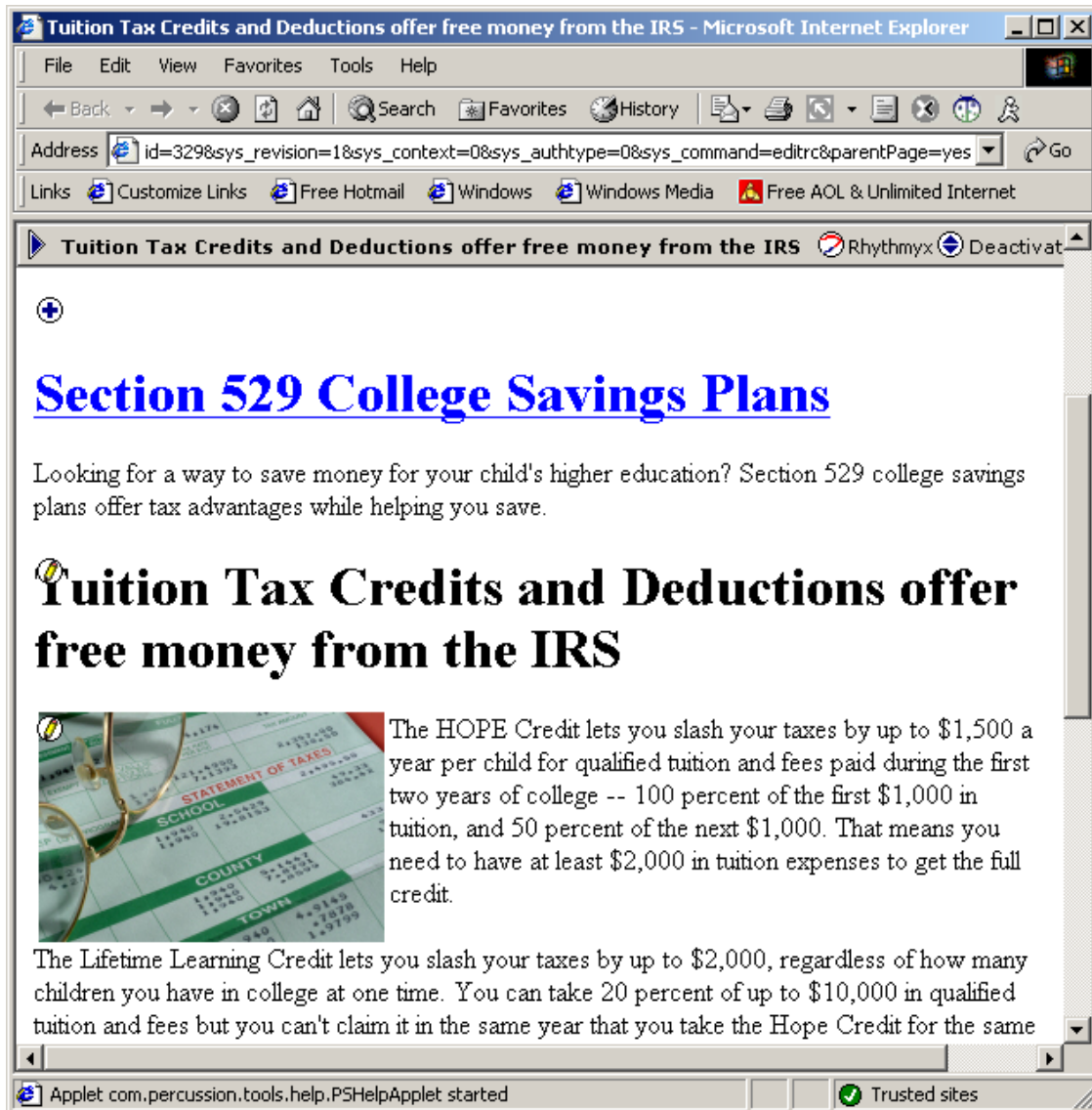


Figure 24: Content Item Preview with Graphic

Now, add the Money Roll Image to the 529 Content Item and add the Girl Looking at Camera Image to the Important Things... Content Item. You may want to try alternative formatting for these images (for example, aligning right instead of left).

## Previewing the Content Item

Now that we have added related content to our Content Items, let us preview them to see how they will look when published.

To preview the Tuition Content Item:

- 1 In the Navigation Pane of Content Explorer, open the Education folder.
- 2 Right-click on the Tuition Content Item and on the popup menu choose *Enterprise Preview > P - EI Generic*.

Rhythmyx displays a preview of the Tuition Content Item.

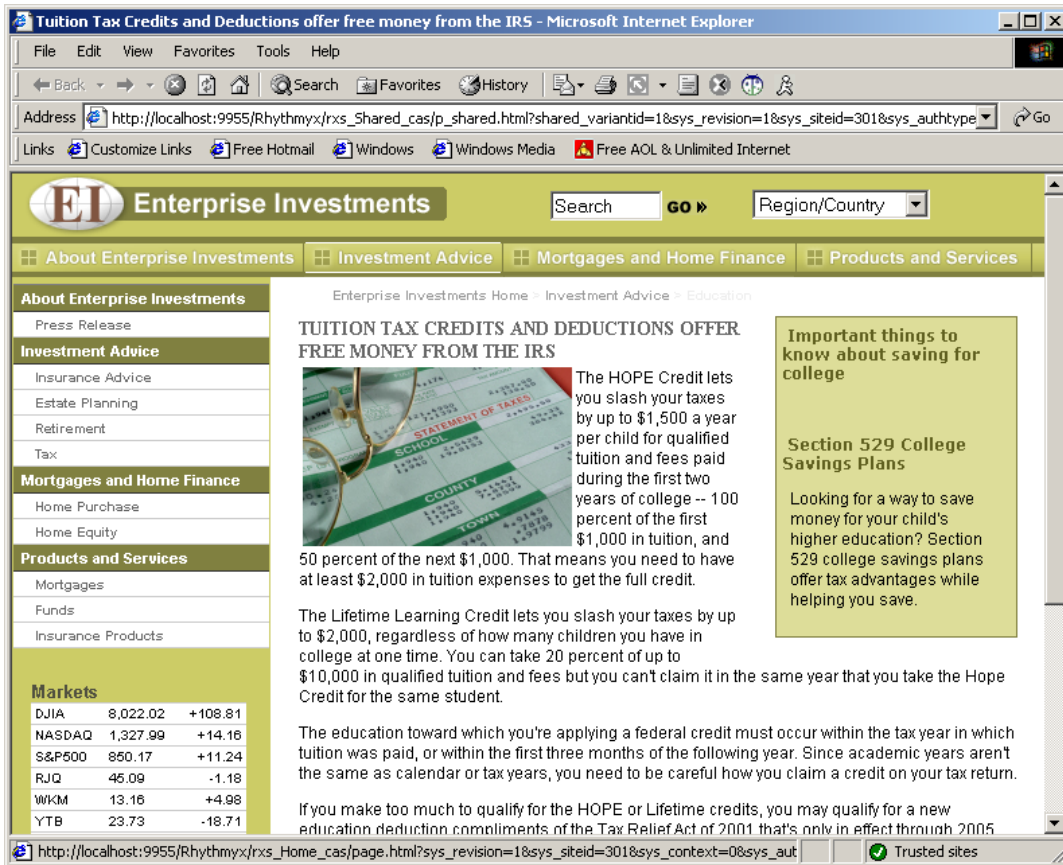


Figure 25: Content Item Site Preview

Note that the page includes the graphic we added, and the list of related Content Items in the List Slot on the right side of the page.

Click on the Important Things or Section 529 Content Item. Rhythmyx displays previews of these pages. These previews give you an idea of how the pages will look when published. Note, however, that the related Content Items will only be included if they are Public. The following section, which describes Workflow, explains how to make these new Content Items Public.

## Workflow

A Workflow is a business process that defines the life cycle of a Content Item. In Rhythmyx, every Content Item must exist within a Workflow. The Workflow defines:

- the steps or stages in the processing of the Content Item;
- which users can access the Content Item at a particular point in its life cycle; and
- what different users can do to the Content Item at each point.

Rhythmyx defines a Workflow as a series of stages, or States, which define the life of the Content Item. In each State, users in specific Roles have access to the Content Item. Users in some Roles can modify the Content Item, while users in other Roles can only see and read the Content Item. Users with the correct access can also Transition Content Items, moving them between States in a Workflow.

## Check In and Check Out

The check in and check out functionality in Rhythmyx allows multiple users to have access to all Content Items, but prevents more than one user at a time from modifying a Content Item. When a user checks out a Content Item, only that user can edit the Item; it is unavailable to all other users.

Check in and check out are special types of Transitions. Check in and check out do not move a Content Item from one State to another, as do normal Transitions. Instead, check in sets a lock flag that indicates a user has the Content Item checked out. Check in removes this flag.

In many cases, Rhythmyx checks Content Items in and out automatically. In a few cases (notably when initially creating a Content Item or after modifying the Content Item), you must check the Item in manually.

## About Roles

A Role is a collection of users with the same access in Rhythmyx. In Workflows, Roles determine which users can access content in each State and which Transitions they can apply.

Organizing users into Roles helps administrators manage users that have the same permissions. Instead of managing the permissions for each user, they define a Role its permissions, then assign users to it. Users inherit their access rights from the Roles to which they are currently assigned.

## Transitioning Content Items to a New State

Now that we have finished creating our Content Items and adding related content, we want to make them Public so we can publish them. We will need to perform a Transition on the Content Item.

To Transition the Tuition Content Item:

- 1 In the Navigation Pane, go to the Education Folder.
- 2 Right-click on the Tuition Content Item and on the popup menu, choose *Workflow > Submit*.

Rhythmyx displays a Workflow Comment window. You can enter a free-form comment in this window.

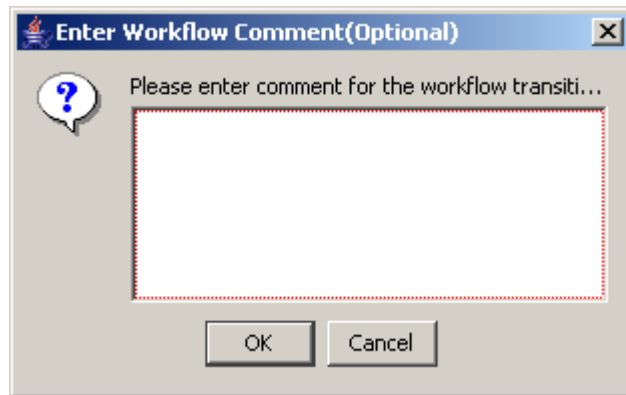


Figure 26: Workflow Comments Popup

- 3 Click the **[OK]** button to continue making the Transition.

Rhythmyx displays a message box informing you that it is processing the Tuition Content Item.

- 4 When the message box disappears, the Transition is complete, and the Content Item is now in the Review State.

Note that the Author1 user does not have rights to Transition the Content Item in the Review State. If you right-click on the Tuition Content Item now and choose Workflow, the submenu lists *No Entries*.

Repeat the process above for the remaining new Content Items (Important Things to Know and Section 529 Plans, as well as the Education Category Content Item).

## About the Standard Workflow

The Generic Page Content Type uses the Standard Workflow, one of two basic Workflows included with FastForward. The Standard Workflow is a common structure that requires one approval before going to Public.

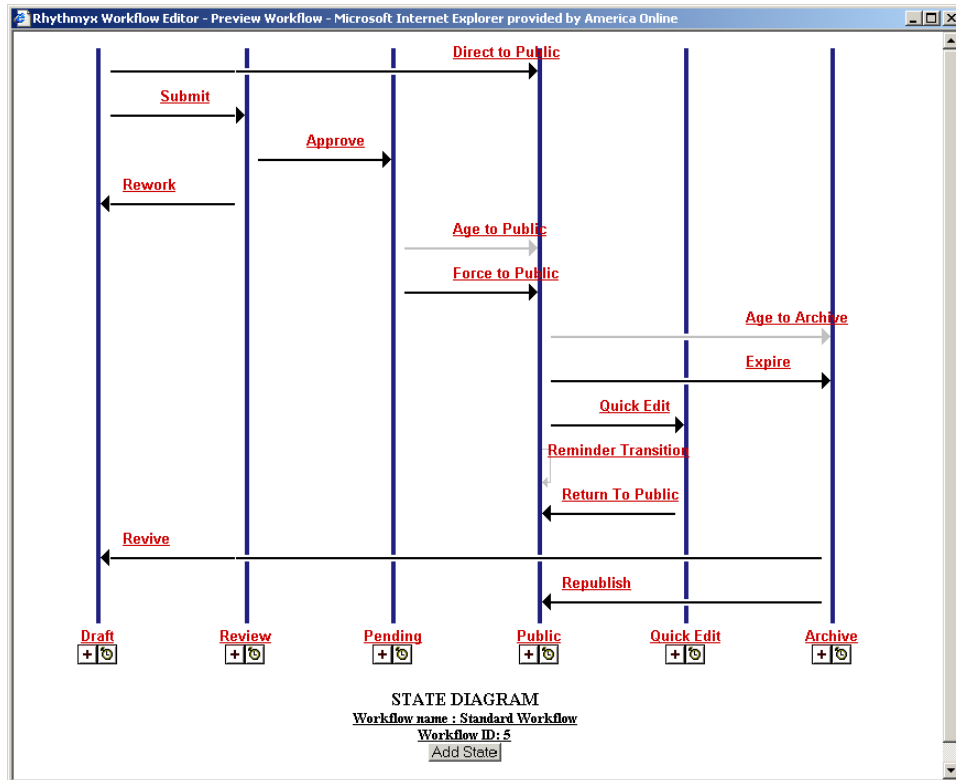


Figure 27: Workflow diagram of the Standard Workflow

Note that the Standard Workflow includes a Pending State between the Review and Public States. This State is included to support internationalized systems. In some cases, internationalized systems require that Translations of Content Items be Published at the same time as the original. The Pending State provides a holding area for original Content Items while waiting for the Translations to be completed.

The Public State is the State in which the Content Item is eligible to be Published. When a Content Item reaches this State, it will be published the next time the Publisher runs.

The Quick Edit State is provided to allow quick touch-ups to Content Items without forcing them through the complete Workflow again. For example, if you find a misspelling or minor grammatical error on the Content Item, there is usually no need for it to go back through the complete approval process. Instead, you can move it to Quick Edit, make your change, and return the Content Item to Public immediately. Note that your changes will not be reflected in the published output until the Content Item is re-published.

Finally, the Archive State provides a terminal State for Content Items after they have expired. The Content Items continue to exist in the system, and if necessary can be revived. (In the Standard Workflow, revised Content Items are returned to the Draft State and must go through the complete Workflow before they can return to Public.)



## Moving Content Items to Public

As we noted above, when logged in as Author1, you cannot transition the Education Content Items from the Review State. You must log in as a user with rights to Transition the Content Items in this State. In this case, the user Editor1 has these rights. Start a new browser session and log in as Editor1 (this user uses the standard password *demo*).

(Note that you must start a new browser session. While you can change the Community [and in internationalized environments, the Locale] of the user in the current session, each session is associated with a specific user. In order to log in as a different user, you must start a new browser session.)

Once you have logged in, go to the Education Folder.

We are going to assume for our purposes that these Content Items are all ready to go Public. Rather than Transition them individually, we can Transition them all at once.

To Transition multiple Content Items:

- 1 Select the Content Items you want to Transition. In this case, we want to Transition all of the Generic Page Content Items, and the Education - Category Content Item. The Content Explorer applet supports multi-select. You can hold down the <CTRL> key while selecting Content Items, or if multiple Content Items are adjacent, select the first Content Item, then hold down the <Shift> key while selecting the last Content Item you want to select. All Content Items in between will be selected as well.

- 2 Right-click and from the popup menu, choose *Workflow > Approve*.

When you multi-select, Content Explorer displays only the Transitions that all selected Content Items have in common. In this case, the Content Items should have the following Transitions in common:

- Check-out
- Approve
- Rework

If the selected Content Items have no Transitions in common, when you select Workflow from the popup menu, the submenu option will be *No Entries*.

- 3 Rhythmyx displays the Workflow Comment window. If you enter a comment in this window, it will be added to the record for all selected Content Items. You cannot enter different comments for different Content Items in the selection. If you want to enter different comments for different Content Items, you must Transition them individually.
- 4 Click the [OK] button.

Rhythmyx displays a message window showing the Content Items it is Transitioning. When the message window disappears, all selected Content Items have been Transitioned.

All of the selected Content Items are now in the Pending State. Ordinarily, when using the Standard Workflow, you would allow Rhythmyx to move the Content Items to Public automatically using the Aging functionality. In the Standard Workflow, an Aging Transition has been added from the Pending State to the Public State. This Transition will automatically move the Content Items to Public based on the System Field **Start Date**. Recall that we preserved the default Start Date, which is the current date, when we created our Content Items. When the aging process on the Rhythmyx server (known as the Aging Agent) runs, it will find our Content Items, and note that their Start Date is the current date (or the past date when you created them). Thus, it will move the Content Items to Public automatically. The Aging Agent runs every ten minutes, so you may have to wait a few minutes for your Content Items to Transition automatically.

If you don't want to wait, another Transition, Force to Public, is also available from the Pending State. The Force to Public State is only available to users in the Admin role, so if you want to force these Content Items to Public, you will have to start another browser session and log in as admin1 to have access to Transition these Content Items.

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## Maintaining Managed Navigation for the Education Folder

Recall that when we created the Education Folder, Rhythmyx automatically created a Navon Content Item of the same name in the Folder. Navons are Content Items, and act like other Content Items in the system. They include Slots and have related Content Items assigned to them. Navons also exist in a Workflow and can be Transitioned. During assembly, however, Navons are treated somewhat differently. Rhythmyx uses them to create a background XML document that it uses to apply navigation to published pages.

To ensure that our Education Folder and its content are published correctly, we will need to assign a Content Item to the Landing Page Slot of the Education Navon, and we will have to make the Navon Public.

Note that although the users `author1` and `editor1` could see the Education Navon, this Content Item actually exists in the Enterprise Investments Admin Community. Since the users `author1` and `editor1` are members of the Internet Community, they cannot access the Education Navon. The user `admin1`, however, can log in to the Enterprise Investments Admin Community and thus can maintain this Content Item. If you still have a browser session for the `admin1` user active, you can use that session. Otherwise, you will need to start a new browser session and log in as `admin1`.

Regardless of whether you use an existing browser session or log in to a new session, you will need to change the Community `admin1` is logged in to from Enterprise Investments to Enterprise Investments Admin.

## Assigning an Landing Page to the Education Navon

A landing page is the page you are directed to when you click on a link in the Navigation. This page has links to all of the other pages in the directory. A landing page is typically a page of a Category Content Type, which will automatically include links to all other Page Variants of Content Items in the same Category. In some cases, however, you may want more manual control over the links on the landing page, and may prefer to use a Generic Page Content Item as the landing page.

To add a Landing Page to the Education Navon:

- 1 In the Navigation Pane, go to the Education Folder.

Navons generally act like normal Content Items in the system, so they include Slots. However, during assembly, Navons are used to create a background XML document that is used to add navigation to published pages. They are never assembled into Snippets or Pages. Therefore, you cannot use the Active Assembly Preview to maintain the Slots on a Navon. You must use the Active Assembly Table Editor to add related content to the Slots on a Navon.

- 2 Right-click on the Education - Category Content Item and on the popup menu, choose *Active Assembly Table Editor*.

Rhythmyx displays the Active Assembly Table Editor.

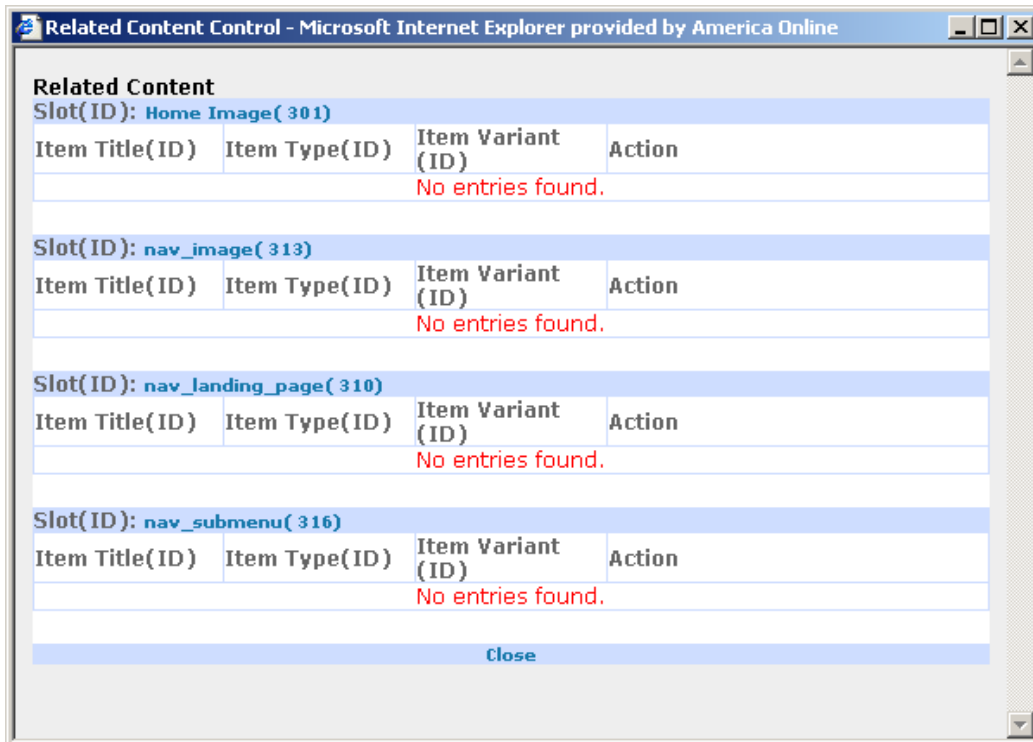


Figure 28: Education Navon Table Editor

- 3 Click the [nav\\_landing\\_page](#) link.  
Rhythmyx displays a search window. Search on the term "education".
- 4 The search results will only include S - Title Link Snippets. Check the box for the Education - Category Content Item and click the **[Link to Slot]** button.

- 5 The Education - Category Content Item will be added to the nav\_landing\_page Slot on the Table Editor.

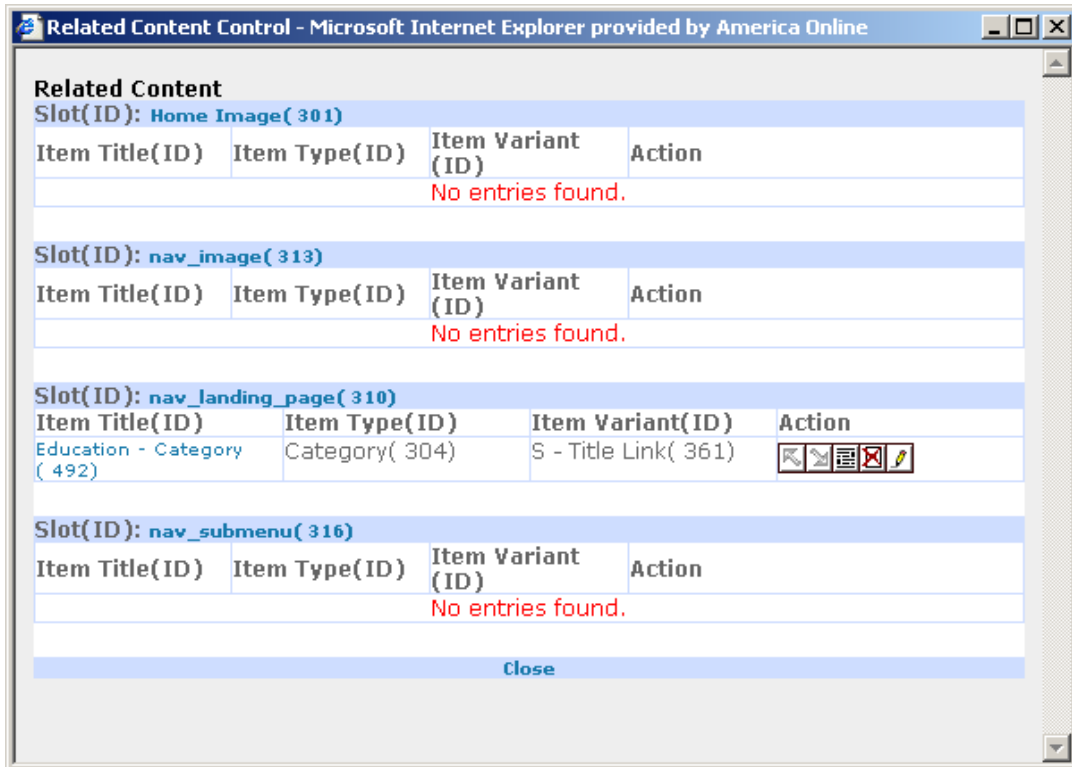


Figure 29: Education Navon Table Editor with Landing Page

- 6 Close the table editor.

To see how the landing page works, Preview the Enterprise Investments Home Page. In the left navigation bar, you will see that Education has been added as a section under Investment Advice. If you click on this link, you will be directed to the Education Category page, which includes links to the Education Content Items we added.

## Making the Education Navon Content Item Public.

Before our new Education section can be published correctly, we need to make the Education Navon Public.

Use the same procedure that you used to Transition the other Content Items. Notice that when you choose Workflow from the popup menu, the submenu includes the option Direct to to Public. We will not be making any additional changes to the Education Navon, so use this Transition.

When you are finished, all of the Content Items in the Education Folder, including the Education Navon, will be Public. Now you are ready to publish this Site with the new Section.

## Publishing the Web Site with the Education Section

Now that we have added our new section, we are ready to publish the Web Site to include it.

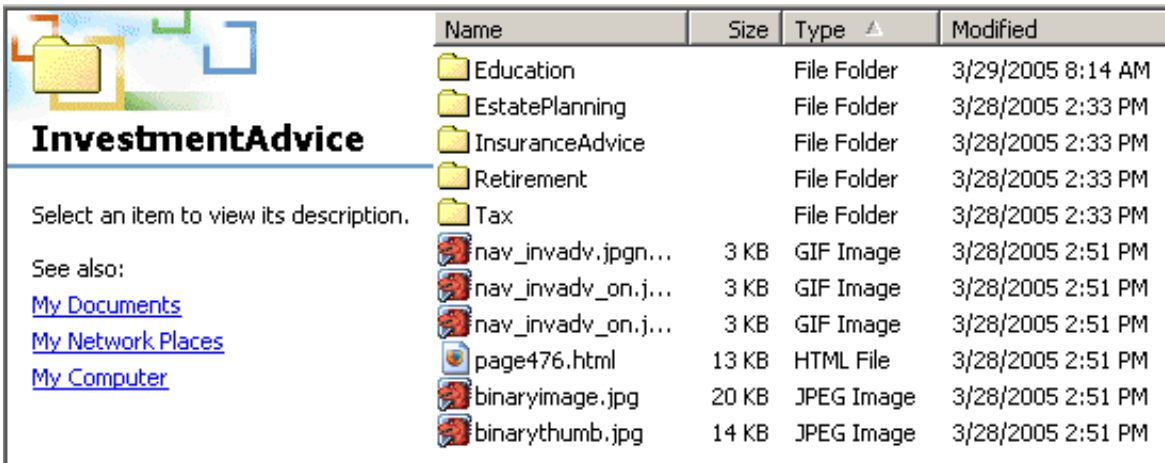
To publish the site, in Content Explorer, choose the Publishing tab and go to the Editions window. In the Publish column of the Full Internet Edition, click the run icon (🏃).

Rhythmyx redirects you to the Publisher Status page. This page displays updates regarding the state of your publishing run.

The run may take five to ten minutes to complete. When it is complete, the Status page will state "Edition is no longer in progress." Click the Publishing tab to return to the Publishing home page. This page lists the Publishing logs. You should see a new log entry with the date stamp of the time you initiated the run. If the value in the Status column is *Success*, then you have published your content successfully. If the value is *Error*, then a problem occurred during the run.

### Successful Publisher Runs

If the Publisher runs successfully, you will see a new subdirectory (Education) in the Investment Advice directory of your Publishing target location.



Name	Size	Type ▲	Modified
Education		File Folder	3/29/2005 8:14 AM
EstatePlanning		File Folder	3/28/2005 2:33 PM
InsuranceAdvice		File Folder	3/28/2005 2:33 PM
Retirement		File Folder	3/28/2005 2:33 PM
Tax		File Folder	3/28/2005 2:33 PM
nav_invadv.jpgn...	3 KB	GIF Image	3/28/2005 2:51 PM
nav_invadv_on.j...	3 KB	GIF Image	3/28/2005 2:51 PM
nav_invadv_on.j...	3 KB	GIF Image	3/28/2005 2:51 PM
page476.html	13 KB	HTML File	3/28/2005 2:51 PM
binaryimage.jpg	20 KB	JPEG Image	3/28/2005 2:51 PM
binarythumb.jpg	14 KB	JPEG Image	3/28/2005 2:51 PM

Figure 30: Investment Advice Directory with Education Subdirectory

If you do not see this directory, then none of the Content Items in the Site Folder were published. The most common reason for Content Items not to be published is that they are not in the Public State. Go back to the Content Tab of Content Explorer and Transition all of the Content Items in the Education Folder to Public.

Another reason that the Education directory might not be created is that it does not contain any Content Items. Go back to the Content tab of Content Explorer and move the Education Content Items to the Education Folder.

If you open the Education directory, you will see five new HTML pages. The names of most of these files will be pageNNN.html. The value of NNN will be the Content IDs of the Generic Page Content Items you created during this walk-through. The page for the Generic Word Content Item, however, will be SavingForCollege.htm, which is the name of the Word document. The values should resemble those in the graphic below:

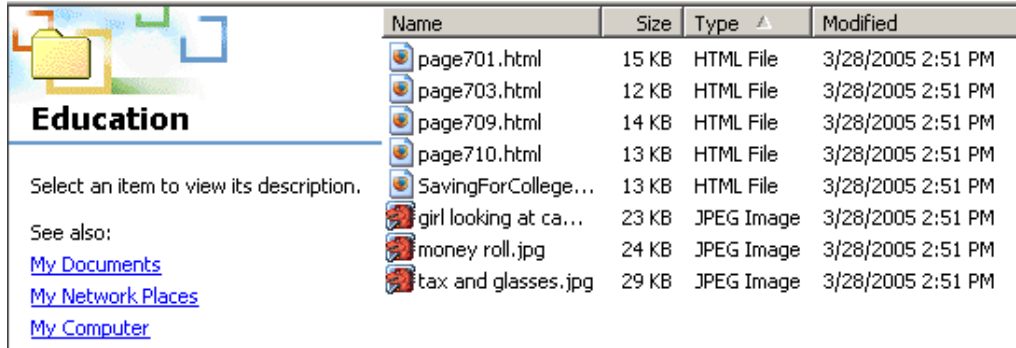


Figure 31: Published Education Directory with Content

If any of the Content Items you created are missing, either they are not Public or they are not in the Education Folder.

If you access one of the pages, it will resemble the following screenshot:

The screenshot shows a web browser window displaying a page from Enterprise Investments. The page title is 'Tuition Tax Credits and Deductions offer free money from the IRS'. The page content includes:

- Section 529 College Savings Plans:** Important things to know about saving for college. Looking for a way to save money for your child's higher education? Section 529 college savings plans offer tax advantages while helping you save.
- The HOPE Credit:** The HOPE Credit lets you slash your taxes by up to \$1,500 a year per child for qualified tuition and fees paid during the first two years of college -- 100 percent of the first \$1,000 in tuition, and 50 percent of the next \$1,000. That means you need to have at least \$2,000 in tuition expenses to get the full credit.
- The Lifetime Learning Credit:** The Lifetime Learning Credit lets you slash your taxes by up to \$2,000, regardless of how many children you have in college at one time. You can take 20 percent of up to \$10,000 in qualified tuition and fees but you can't claim it in the same year that you take the Hope Credit for the same student.
- Maximum Deduction:** The maximum deduction you can take is \$4,000 in 2004 and 2005. To qualify, your adjusted gross income may not exceed \$65,000 (\$130,000 for married couples filing jointly). And if your AGI is above those limits but does not exceed \$60,000 (\$160,000 for joint filers), then you're entitled to a maximum deduction of \$2,000.
- Income Qualification:** If your income qualifies you to take the HOPE and Lifetime credits as well as the new deduction, you may only take one of them for the same child in the same year. Remember, a deduction reduces your taxable income by a percent of every dollar, whereas a credit offers dollar-for-dollar reduction of the tax you owe. If you're in the 25 percent tax bracket, a \$100 deduction means you'll pay \$25 less in taxes, whereas a \$100 credit means you'll pay \$100 less.

The page also features a sidebar with navigation links (About Enterprise Investments, Investment Advice, Mortgages and Home Finance, Products and Services) and a market data table.

Markets	Value	Change
DJIA	8,022.02	+108.81
NASDAQ	1,327.99	+14.16
S&P500	850.17	+11.24
RJQ	46.09	-1.18
WOM	13.16	+4.98
YTB	23.73	-18.71
TWUR	56.27	-1.01

Figure 32: Published Tuition Content Item

## Unsuccessful Publisher Runs

If the value of the Status column is Error, your Publishing run failed. See *Getting Started with FastForward for Web Content Management* for some troubleshooting hints for failed publishing runs.



## CHAPTER 3

# Creating and Maintaining Variant Templates

FastForward is designed to provide the foundation of a functional Content Management System, including a basic set of Content Types, Content Assemblers, and Variant templates that produce working Web site out of the box. Though you need not limit yourself to the FastForward infrastructure, you should begin your implementation by using the out-of-the-box applications and Variants, applying your own Variant templates to produce the desired look and feel.

For example, you may need to replace the specific stylesheet used to produce the S - Title Link snippet with a new one to match local formatting, you should not need to replace the whole Variant.

This is a common theme in FastForward. As much as possible, you should re-use or re-purpose the FastForward infrastructure provided by Percussion Software. Only when no existing Variant (or Content Type, or other element of FastForward) meets your local requirements should you consider customizing the implementation by modifying the existing infrastructure or adding new implementation elements.

In this chapter, we will examine the process of developing new Templates to apply your local look and feel to the FastForward infrastructure.

## Content Assembly

Most sites use a hierarchical organization, dividing the site into sections, each section into sub-sections, and sub-sections into yet smaller units, as shown in the following graphic:

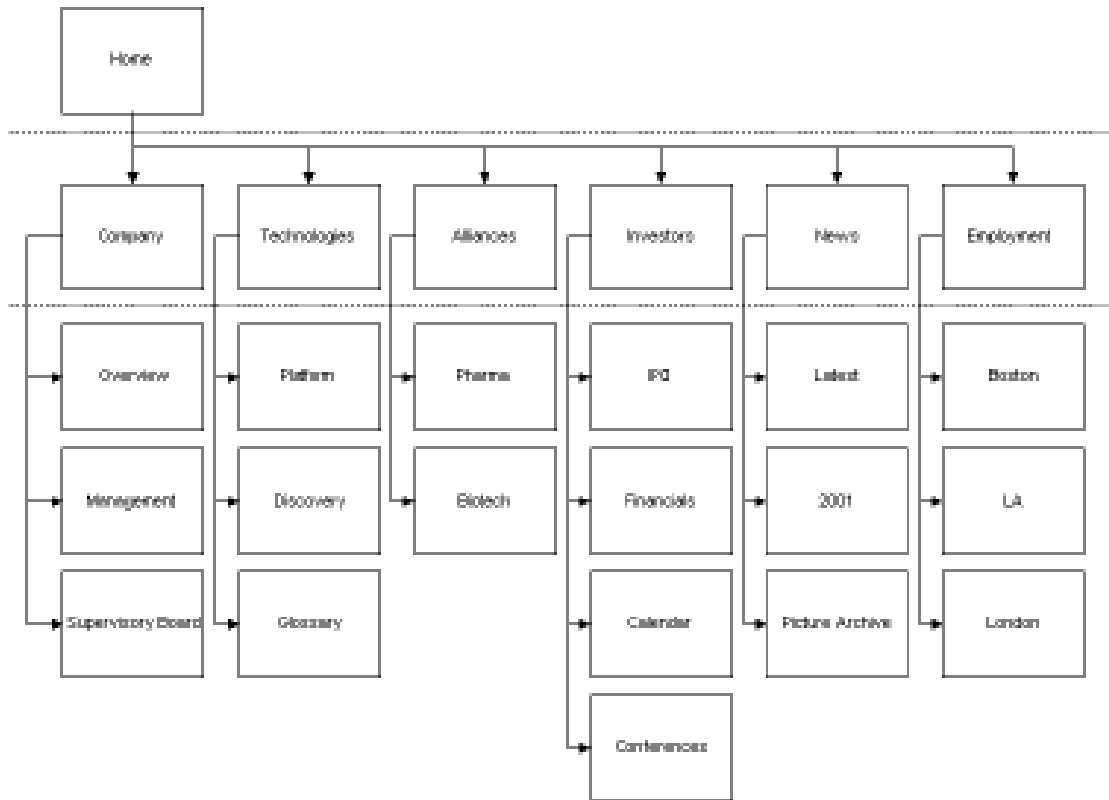


Figure 33: Typical Site Structure

Rhythmyx delivers a traditional structure, but Rhythmyx assembler applications are not typical templates. A Rhythmyx assembler application is a template that merges content extracted from the back-end database with formatting to produce a page or a portion of a page called a snippet. Snippets are the low-level building blocks of the page. In fact, most assembly variants are for snippets rather than for pages because this structure provides the most flexibility when producing a page. Contributors have more flexibility to move content to different pages. Site design becomes more fluid because redesign effort is minimized. Often, all that is required to redesign a site is to rearrange the snippet assemblers assigned to the page assemblers.

When developing Global and Local Templates, always keep these questions in mind:

- What are the pages you want to produce?
- What are the snippets you want to produce?
- What look and feel is common across most pages and can be normalized into a Global Template?
- What Slots belong in the Global or Local Template?

As you develop more templates, you can narrow down the total number of templates on your site by recognizing duplicate templates and eliminating them.

## Developing Templates for Page Variants

Developing the template for a page variant involves two major processes:

- Determine the parent content type of the page.
- Determine which formatting is local to the page and which is part of a slot on the page.

## Determining the Parent Content Type

The first step in designing a Variant is to determine the parent content type for the page. A page generally consists of content items from several different content types, but one of these items is the container or "parent" for all the other content types on the page. The parent item stores all of the pointers to the sub-components, or "child" items on the page. Any type of content item that allows for related content may act as a parent. Very often, the parent content type is an index content type, such as for home pages, but article or other text-rich content types may also be parents. The key issue is that the parent item owns the content relationship, not the child.

To determine the parent content type of the page:

- 1 Identify all the content types used within that page.
- 2 Determine which of those content types are edited by the user that ultimately decides what appears on the page.
- 3 Of those content types, find the content type that would have to be changed the most whenever its related content relationships were changed. This Content Type is the parent. This page is therefore a Variant of that content type.
- 4 If none of these content types needs to be changed when the relationships change, you may need another index content type (indexes are content types that have no local fields, only related content).

The child content types that appear on this Variant generally do not need to be edited just because this parent content has made a relationship to include them. The editor of the parent content item decides to use or relate to the child content items "as they are".

For example, suppose a page contains a featured article content type, a related link content type and an image content type. If the creator or editor of the featured article content items will define the related image and the related link, then the featured article content type should be the parent content type of the page. Changes to that article will have the greatest impact on the related images and links. The page generated in this case is a Variant of the feature article.

However, if the business process for the page dictates that a higher level editor defines the page by choosing any article, image, and related links, then the parent content type for that page is best modeled as an index content type. An index content type allows separate users to create images, articles, and links as unique content items, independent of how any given index author may later decide to combine them. In this case, the page generated is a Variant of that index, not a Variant of the featured article.

It is important to note that any content type could be used as a parent for one Variant, and a child for another Variant. In fact, a content type could be used as both the parent and a child on the same Variant. This is a property of the recursion that is fundamental to the assembly process.

For example, in the first case above, the related link could actually be another feature article. In that case, the parent content type is still a feature article. The page is still a variant of a feature article. However, a different variant of a feature article that produces the related link also appears on that page, as a child item.

## Determining Local Formatting Versus Slots

Once you have determined the parent content type for the page, you need to determine the formatting and content that is local to the page and the content that comes from other content types. Content that comes from items other than the parent, or child content, fits into a space on the page termed a "Slot". You may find a printed copy of your page useful to help you define the slots, and you will probably want to make an electronic copy of your web page as well.

On your printed page, draw a box around each unique portion of the page. Elements you may want to isolate include:

- the banner, the footer, and navigation bar;
- any lists of used for navigation;
- any images;
- sidebars;
- any large blocks of text.

For convenience, you may want to identify each box with a letter or number.

Your resulting page may resemble the following graphic of an Index page:

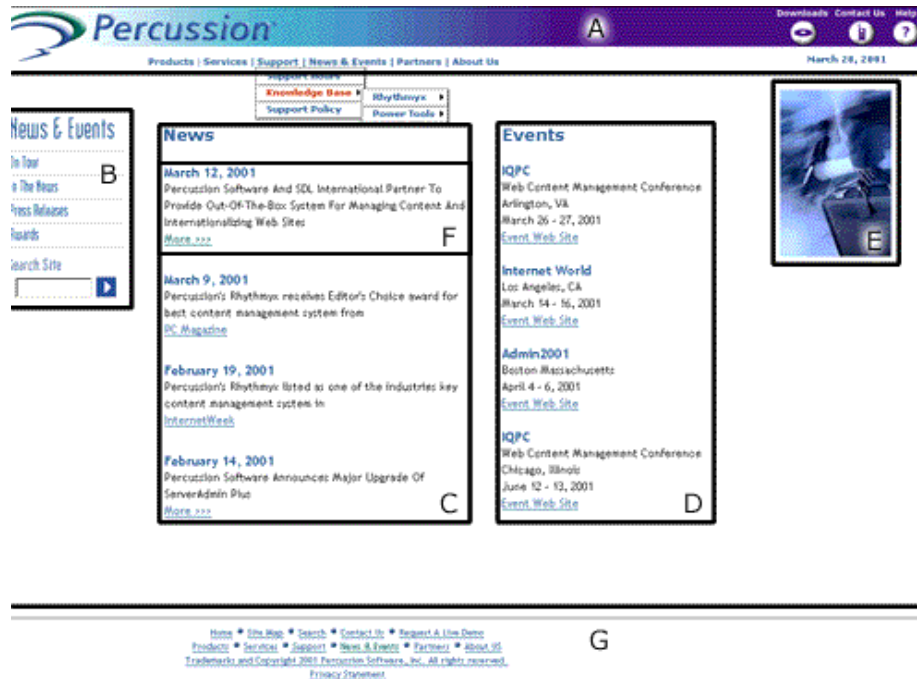
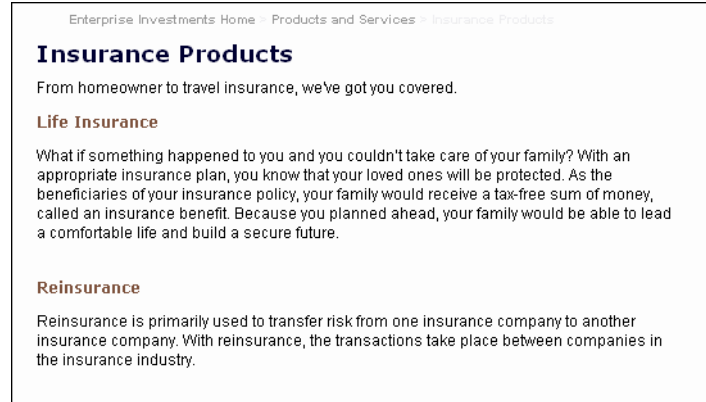


Figure 34: Example Index Page

Note that the banner is identified as a slot (A), as well as the footer (G). The image on the page is also identified as a slot (E). The remaining slots (B, C, D, and F) are lists of related content.

Here is another example, using a text-rich content type as the parent:



*Figure 35: Generic Page Example*

Since this is a text-rich page, the parent content type is probably an article-based content type. If the contributor or editor of this content type defines the related content, then that content type is definitely the parent content type of the page. Thus, Area “H” is local content, a content item of that content type. The image (area “I”) would be a slot because an image is a different content type than a featured article. Again, the banner (J) and footer (K) are identified as slots, as are the Related Features (L) and Also of Interest (M) areas.

Once you have sketched out your slots on paper, you can turn to your HTML file and begin to identify the code for each slot. Mark each slot with a comment identifying where it starts and where it ends.

Once you have identified all of the slots, you can cut the code for each slot out of the parent page, and save it in a separate html file. These files will become the templates for the slot variants.

# Maintaining Global Templates

The FastForward implementation relies on the use of Global Templating to facilitate the reuse of page templates. Global Templating allows the developer to define a master template used to wrap Local Template items, ultimately normalizing redundant HTML. The locally templated items are designed with as little formatting as possible. When the Global template is applied to the locally templated item, the item takes on the look and feel as defined by this master template. This process allows developers to produce pages of many different types but process them through the single master template.

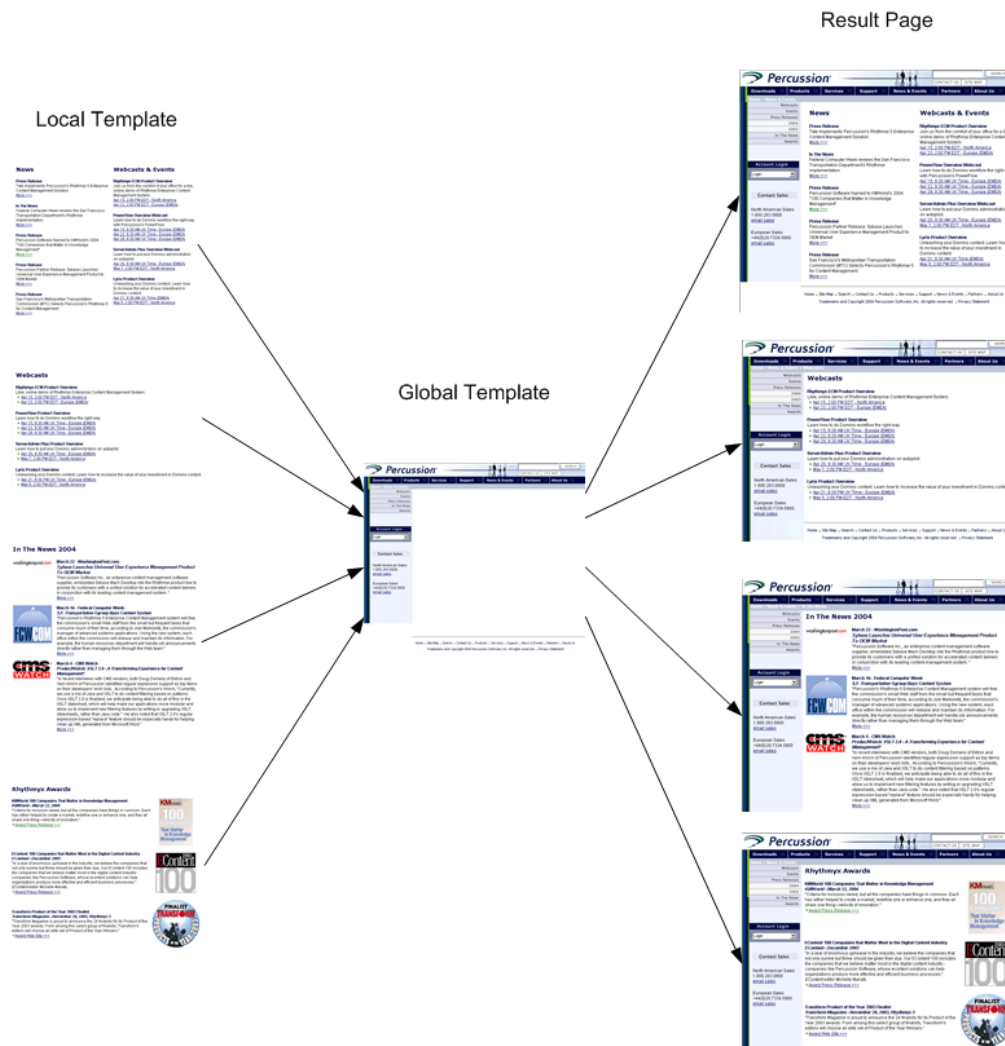


Figure 36: Global Templating of Local Templates

Which master template is selected depends on the following factors:

- If the Variant template calls a specific Global Template, this template is used.
- If the Variant does not call a template, the Site Folder containing the Item (or nearest folder up the tree) defining a Global Template is used.

- If neither the Variant nor any Folder defines a Global Template, the Site level defined Global Template is used.
- If none of the above objects defines a Global Template, no template is used and the Local Page Template is rendered alone.

In addition to Global and Local Templates, a cascading style sheet is tied to each page template.

Corporate Investements			
	Value	Site (id)	Context(id)
✘	../web_resources/corporate_investments	Corporate Investments(303)	Preview(0)
✘	/resources	Corporate Investments(303)	Publish(1)
✘	/resources	Corporate Investments - Mirror(304)	Publish(1)
Enterprise Investments			
	Value	Site (id)	Context(id)
✘	../web_resources/enterprise_investments	Enterprise Investments(301)	Preview(0)
✘	/resources	Enterprise Investments(301)	Publish(1)
✘	/resources	Enterprise Investments-Mirror(302)	Publish(1)
rxs_navbase			
	Value	Site (id)	Context(id)
✘	../web_resources	Preview Site(0)	Preview(0)
✘	../web_resources/enterprise_investments	Enterprise Investments(301)	Preview(0)
✘	../web_resources/corporate_investments	Corporate Investments(303)	Preview(0)

Figure 37: Context Variables

The combination of Global Templating and CSS provides maximum control over style, design, and structure with minimal redundancy.

## How Global Templating Works

At the file level, Rhythmyx implements Global Templating by selectively importing specified stylesheets. Which stylesheets it imports depend on the Site to which the Content Item belongs, the Site Folder in which it is located, or the Variant used to publish the Content Item.

The following example walks through the creation of a Generic Item. We will assume that the user is logged in to Rhythmyx as a member of the Author Role.

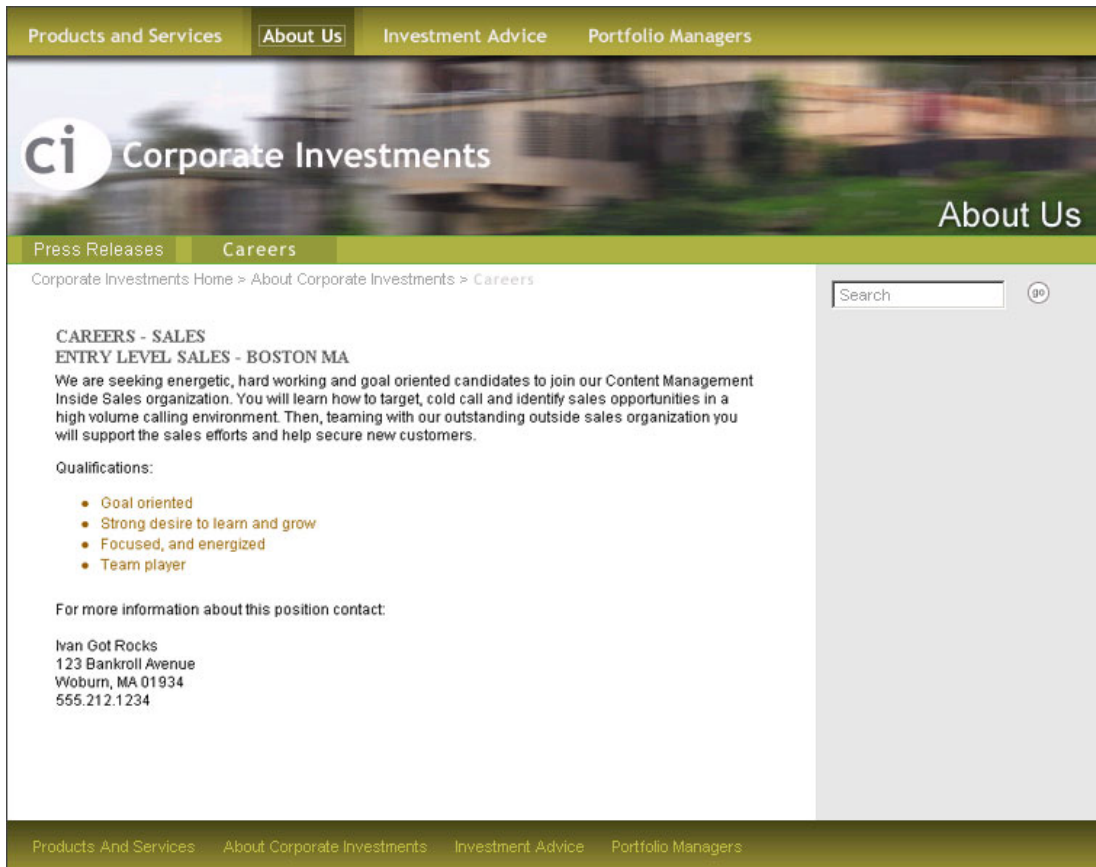


Figure 38: Job Listing Page

When an Generic Item is requested during publish or preview, the following sequence of imports occurs:

- 1 The user selects the Content Item and requests a preview of the P - CI Generic Page Variant of the Content Type.

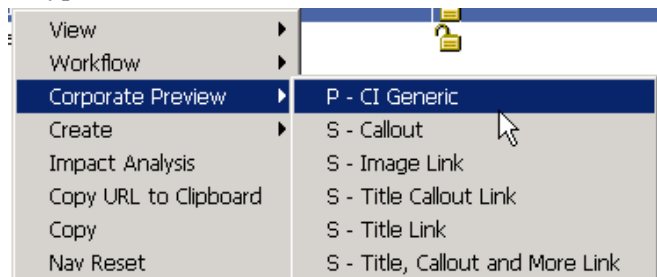


Figure 39: Previewing a Generic Page



- 2 This selection triggers a request to the rx\_shared\_cas application.
- 3 This application queries the database for the Content Item data and generates an XML document, to which it applies the p\_CIGeneric.xml template. This template requests local stylesheet data, and calls rx\_GlobalTemplate.xml. The rx\_GlobalTemplate.xml imports all existing Global Template stylesheets and applies the correct one. It also imports rx\_Globals and makes the necessary template calls to build the Page header.

---

Note: If neither the Site nor Site Folder defines a Global Template, the Local Template is rendered alone, without any Global Template formatting.

---

- 4 Since we are previewing an item from the Corporate Investments Site, and this Site has the corporate-investments-global Global Template defined as the default Template, the corporate-global-template\_root template is called.

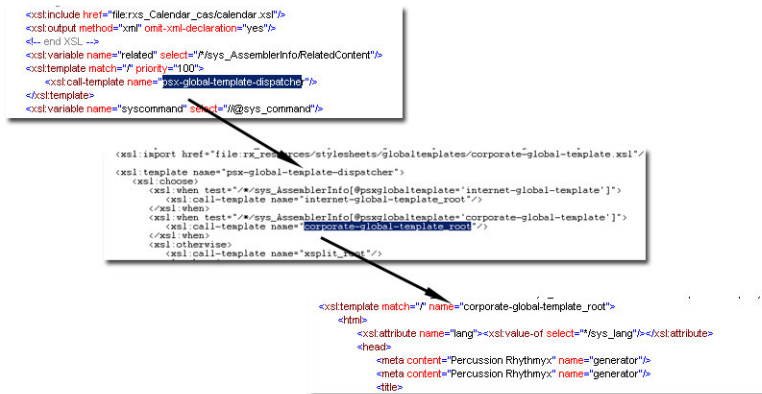


Figure 40: Building a Global Template

- 5 This template (corporate-global-template\_root) begins the rendering of the page, including page title, css imports, and invocation of the rxglobal\_head template. The template rxglobal\_head continues the creation of the page with the rendering of meta tags.

```

<xsl:template name="rxglobal_head">
  <!-- populates the shared-metadata-driven elements of the <head> element -->
  <!-- (doesn't include <title> because Tidy requires that element in the source file) -->
  <meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
  <meta name="description" content="{${shared/description}}"/>
  <meta name="keywords" content="{${shared/keywords}}"/>
</xsl:template>

```

Figure 41: Global Header Template

- 6 The template `corporate-global-template_body` is then invoked to render the remaining pieces of the Global Template. Within this template, the local template is called; `xsplite_body`. The local template, `p_CIGeneric.xml`'s `xsplite_body`, is then finally rendered within the global body. The result is the merging of the local template (`p_CIGeneric.xml` for this example), `rx_GlobalTemplates.xml` (from the `rx_resources` directory), and the global template (`corporate-global-template.xml`) from `rx_GlobalTemplates.xml`.

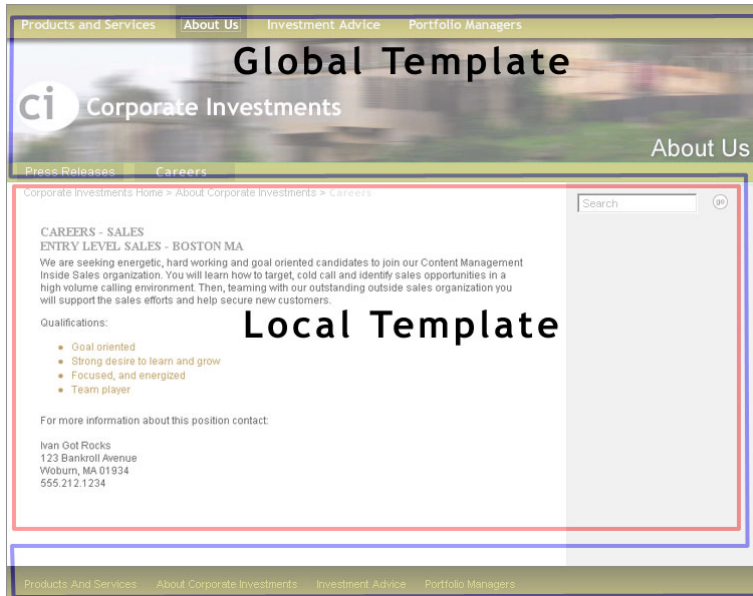
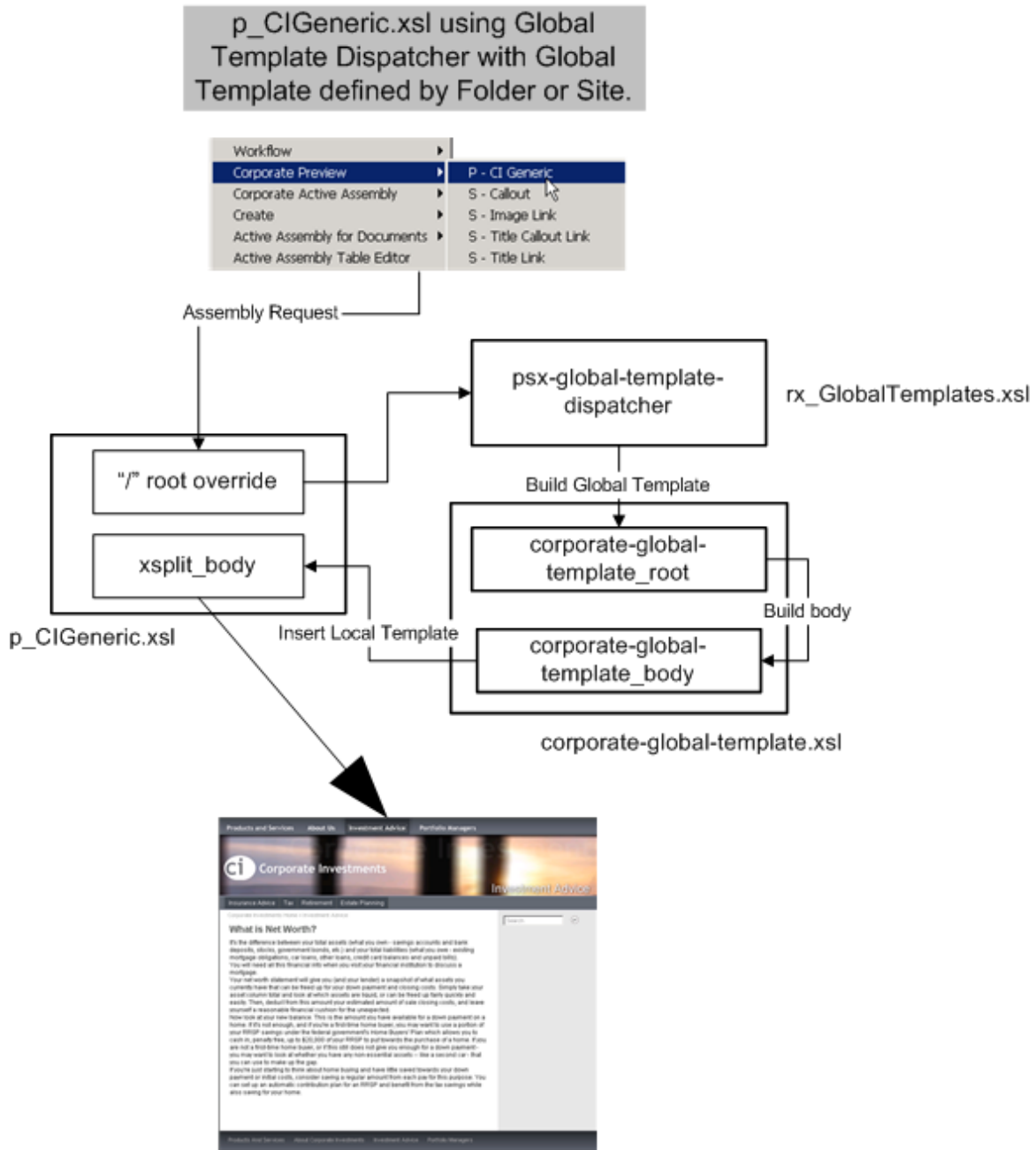


Figure 42: Local and Global Template

A diagram of the entire Global Templating process would look as follows depending on how Rhythmyx is being directed to approach the application of the Global Template (if at all).

### Global Template defined at the Site or Site Folder level



### Global Template defined at the Variant level

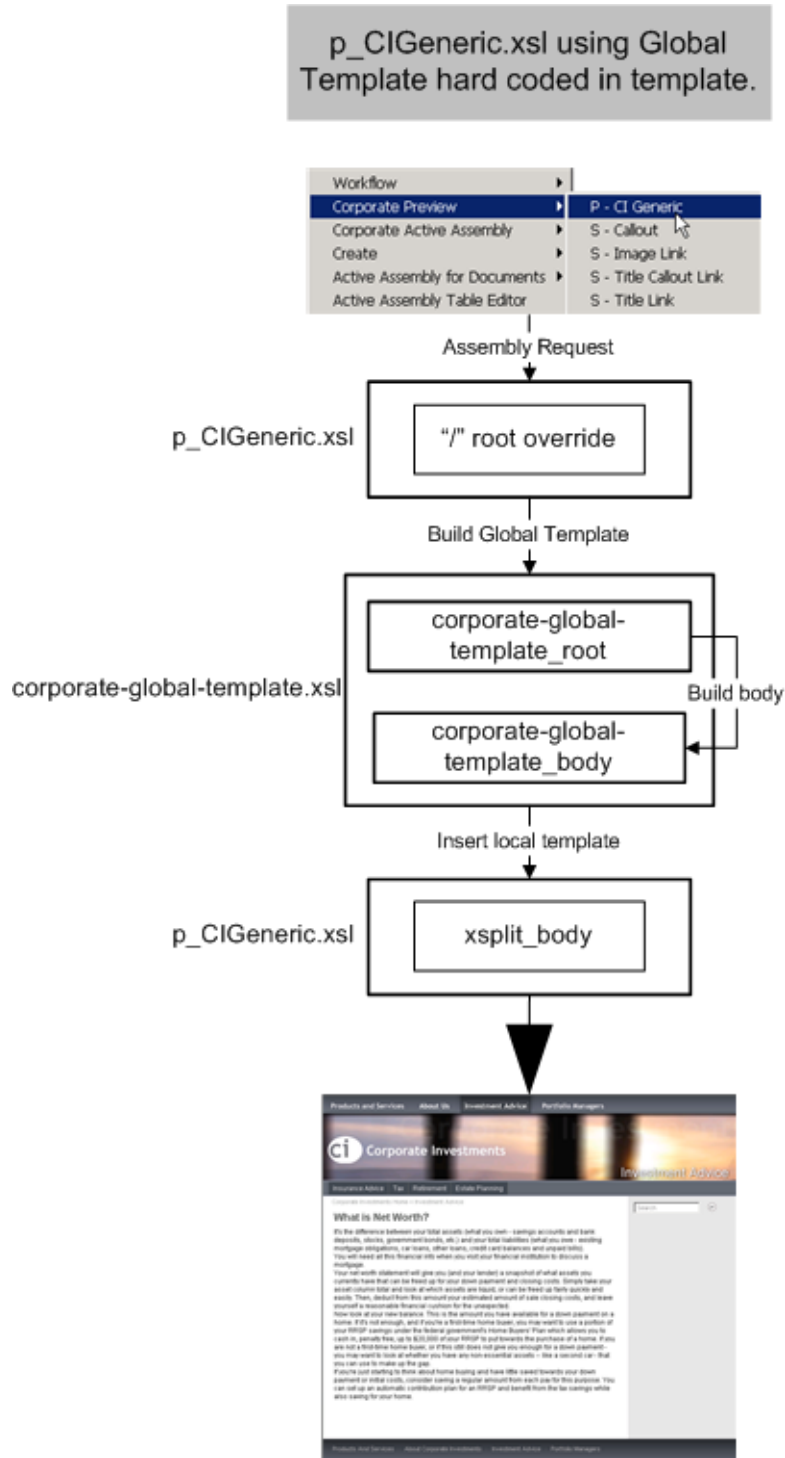


Figure 44: Global Template Dispatched by the Variant

## Global Template not defined

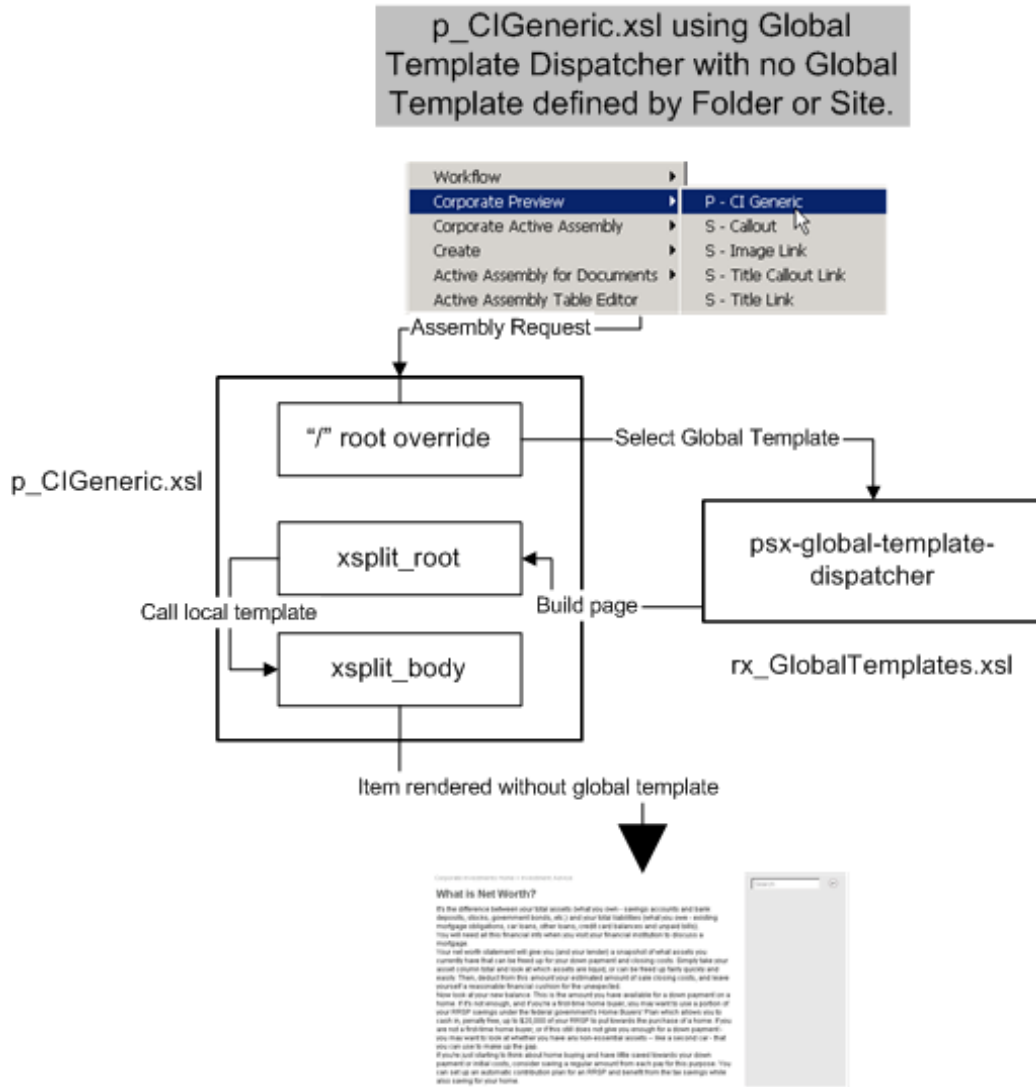


Figure 45: Global Template not Defined

## Customizing Global HTML Templates

You can modify both Global and Local Templates to create the look and feel you want for your site. In both cases, you should follow the specified process, but the process is especially important for Global Templates because of the inherent behavior of XSpLit when you split a template. By default, XSpLit adds import statements of several system and local templates, breaks parts of the page into separate templates (including both a root and a body template), and adds logic to apply Context Variables. When you install a Global Template, you will need to override some of these behaviors.

To create a Global Template:

- 1 Clean up your HTML to make it as compliant as possible with XHTML standards.
- 2 Add Slot formatting to your HTML.
- 3 Add the Local Template marker.
- 4 Add the Global Template to the Rhythmyx Global Template application.

## Cleaning Up Global Template HTML

The first task in implementing a Global Template is to clean up the base HTML. The following tasks are commonly required to clean up HTML:

- Ensure that the HTML document is well-formed. Although XSpLit will apply HTMLTidy to the document prior to splitting it, you should submit your document already tidied as thoroughly as possible.
- Remove any DOCTYPE declarations. (All DOCTYPE declarations must be made in the Local Template.)
- Remove un-necessary inline scripting and relocate it to separate support files.
- Remove un-necessary inline styles and relocate it to separate support files.

The support files storing design elements used in your Global Template should be stored in the appropriate Web Resources directories (such as Rhythmyx/web resources, as well as any web resources directories on your production and staging Rhythmyx and Web servers.

FastForward uses XHTML and CSS for formatting and layout, and the following examples use these technologies as well. Using these standards makes it easier to re-use and re-purpose both page templates and template elements across multiple Sites.

Note that XSpLit can produce templates that generate both HTML and XHTML. If you want your assembled output to be XHTML, then you must ensure that all of the documents you submit to the Workbench are already XHTML-compliant.

## Adding Navigation Slot Markup

Navigation Slots are typically part of the Global Template (although breadcrumbs may be part of the Local Template instead), but Global Templates may also contain local content that is not related to navigation as well. When formatting a Slot on a Global Template, use the following syntax:

```
<div psx-slotname="nav_left">Sample Nav Content </div>
```

The attribute `psx-slotname` indicates that the container element (`<div>` in this case) is actually a place holder for the slot named “nav\_left”.

Note that the container element must be a real container of data, such as a `<div>`, `<span>`, or `<td>` tag. It cannot be a non-container element, such as `<tr>`.

Note further that any child elements of the Slot container element will be removed in the final Global Template XSL generated by XSpLit. Thus, any child elements (or data) of the Slot container are useful only to facilitate visual review of the Global Template HTML source in a browser during design.

## Adding the Local Template Marker

The Global Template wraps a body, which consists of a Content Item rendered by a Local Template Variant. The global Template must specify where this body occurs. Use the following syntax to define the Local Template body:

```
<td width="100%" psx-localtemplate="yes">
```

For example:

```
<table bgcolor="#000000" border="0" cellpadding="0" cellspacing="0"
  height="20" width="100%">
  <tr>
    <td width="100%" psx-localtemplate="yes">
      <div id="content">
        <div id="content_displaytitle">About EI</div>
        <p>About EI</p>
      </div>
    </td>
  </tr>
  <tr>
    ...
  </tr>
</table>
```

Similar to slot markup, the attribute `psx-localtemplate="yes"` indicates that the container element is a place holder for the body of the page that comes from the local variant. The same notices and warnings that applied to Slot markup apply to Local Template markup.

## Optional Global Template Overrides

When creating a Global Template, XSpLit performs the following processing by default:

- Calls the `rxglobal_head` template from `RxGlobals.xml` to populate the shared metadata of the `<head>` element.
- Processes all `<link>` and `<script>` child elements of the `<head>` element to make the URLs context-based.
- Processes all `<img>` tags to make the URLs context-based.

In each of these cases, XSpLit uses default values. If you want to use a header template or a file location other than the default, you will need to override the default processing.

## Changing the Header Metadata

When you install a Global Template, XSpLit automatically adds the following template call to the `<head>` element:

```
<xsl:template name="rxglobal_head">
  <!-- populates the shared-metadata-driven elements of the <head>
  element -->
  <!-- (doesn't include <title> because Tidy requires that element in
  the source file) -->
  <meta http-equiv="Content-Type" content="text/html; charset=UTF-8"/>
  <meta name="description" content="{ $shared/description }"/>
  <meta name="keywords" content="{ $shared/keywords }"/>
</xsl:template>
```

This template calls `rxglobal_head`, which is the default `<head>` metadata template for Rhythmyx, and is included in `rx_Globals.xml`.

If you want to include different metadata in your header, you will need to define a different metadata template with different metadata tags, and include it in a different XSL file. Use the default template above as a model.

You will also need to add the following XSL to `<head>` element of your Global Template HTML:

```
<!-- begin XSL -->
  <xsl:call-template name="alternate template"/>
<!-- end XSL -->
```

Where `alternate template` is the name of the alternate metadata template you want to include in your Global Template. When you install your Global Template, XSpLit will process this code to call the template you specify.

## Converting CSS Calls to Context Variables

When you install a Global Template, XSpLit automatically converts all `<link>` child elements of the `<head>` element of your Global Template HTML to use Context Variables. For example, if your HTML includes the following `<link>` tag:

```
<link rel="stylesheet" type="text/css" href="
../web_resources/corporate_investments/css/rxs_styles.css"/>
```

XSpLit converts it to the following code:

```
<link href=" ../web_resources/corporate_investments/css/rxs_styles.css"
rel="stylesheet" type="text/css">
  <xsl:if test="$rxs_css">
    <xsl:call-template name="rx-context">
      <xsl:with-param name="attribute-name" select="&#39;href&#39;"/>
      <xsl:with-param name="attribute-value" select="concat($rxs_css,
&#39;/rxs_styles.css&#39;)" />
    </xsl:call-template>
  </xsl:if>
</link>
```

This code replaces everything in the path before the name of the CSS file with a dynamic context variable. The default variable calls the template `rx-context` from `sys_resources/stylesheets/asmblers/sys_ContextTemplates.xml`. This template defines the default path to the CSS files.

If you store your files a location other than the default (`/web_resources/css`), you will need to override this processing. Use the following code:

```
<link rel="stylesheet" type="text/css" psx-
href="$rxs_css/different_path/rxs_styles.css" href="
../web_resources/corporate_investments/css/rxs_styles.css"/>
```



Where `different_path` is the alternative path to your CSS files. When you install a Global Template HTML with this code, XSpLit will create a dynamic context variable that uses the path you specify.

## Converting Script Calls to Context Variables

When you install a Global Template, XSpLit automatically converts all `<script>` child elements of the `<head>` element of your Global Template HTML to use Context Variables. For example, if your HTML includes the following `<script>` tag:

```
<script language="javascript" src="
  ../web_resources/corporate_investments/script/rxsRollovers.js"
  type="text/javascript"></script>
```

XSpLit converts it to the following code:

```
<script language="javascript" src="
  ../web_resources/corporate_investments/script/rxsRollovers.js"
  type="text/javascript">
  <xsl:if test="$rxs_js">
    <xsl:call-template name="rx-context">
      <xsl:with-param name="attribute-name" select="&#39;src&#39;"/>
      <xsl:with-param name="attribute-value" select="concat($rxs_js,
        &#39;/rxsRollovers.js&#39;)" />
    </xsl:call-template>
  </xsl:if>
</script>
```

This code replaces everything in the path before the name of the JS file with a dynamic context variable. The default variable calls the template `rx-context` from `sys_resources/stylesheets/asmblers/sys_ContextTemplates.xsl`. This template defines the default path to the JS files.

If you store your files a location other than the default (`/web resources/js`), you will need to override this processing. Use the following code:

```
<script language="javascript" psx-src=="$rxs_css/different_path/
  rxsRollovers.js"
  src=" ../web_resources/corporate_investments/script/rxsRollovers.js"
  type="text/javascript"></script>
```

Where `different_path` is the alternative path to your JS files. When you install a Global Template HTML with this code, XSpLit will create a dynamic context variable that uses the path you specify.

## Converting Image Calls to Context Variables

When you install a Global Template, XSpLit automatically converts all `<img>` tags in the HTML to use Context Variables. The processing is identical to the processing for `<link>` and `<script>` tags, but it is performed on all `<img>` in the HTML source. You can override the default processing in the same manner as you can for a `<link>` or `<script>` tag.

## Installing a Global Template

When you finish marking up your Global Template HTML, and add any optional overrides, you are ready to install it. To install a Global Template:

- 1 Open the Rhythmyx Workbench.

- 2 Open the application rxs\_GlobalTemplates.
- 3 On the Files tab of the Navigation pane of the Workbench, locate the Global Template HTML you want to install/
- 4 Drag this file into the application and drop it in an empty part of the workspace.
- 5 On the popup menu, choose *Static Web Page*.

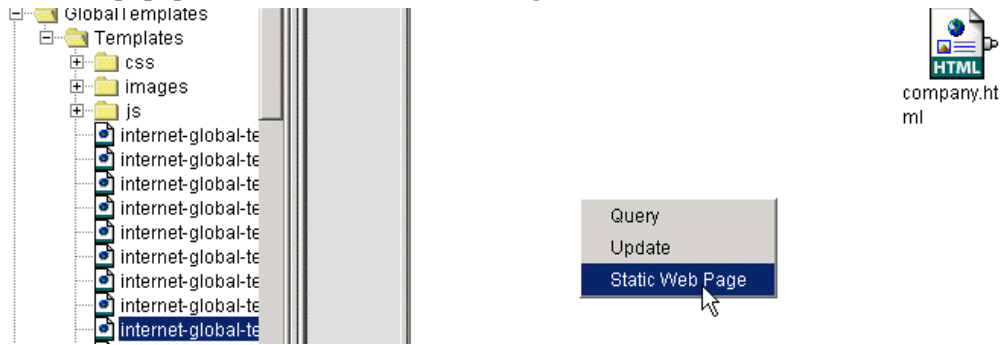


Figure 46: Creating a Static Web Page

- 6 Save the application.

When you save the application, Rhythmyx stops it and restarts it. When the application starts, Rhythmyx invokes the process to create the Global Template, which performs the following processing:

- All web page resources are saved on the Rhythmyx server under the rxs\_GlobalTemplates application directory.
- All HTML source files under the rxs\_Global Templates directory are processed to create Global Templates. (All HTML sources files are processed, regardless of whether a Global Template already exists for the file. This practice ensures that Rhythmyx processes updates to any specific Global Template HTML file.
- The Global Template XSL stylesheet will be created in the directory rxresources/stylesheet/globaltemplates.
- The file rxresources/stylesheet/assemblers/rx\_Globals will be modified to import the Global Templates. For example:

```
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
  exclude-result-prefixes="psxi18n" version="1.1"
  xmlns:psxi18n="urn:www.percussion.com/i18n">
  <xsl:import href="file:rx_resources/stylesheet/globaltemplates/internet-global-template.xsl"/>
  <xsl:import href="file:rx_resources/stylesheet/globaltemplates/intranet-global-template.xsl"/>
  ...
</xsl:stylesheet>
```

- The assembler cache is cleared. All Variant XSL stylesheets are touched to ensure that the server clears caching for all stylesheets.

## Updating Global HTML Templates

If you modify a Global Template HTML, you must re-split it and clear the old version from the server's cache. To update a modified Global Template:

- 1 Open the Workbench.
- 2 Open the rxs\_GlobalTemplates application.
- 3 Select the Files tab from the Workbench Navigation Panel and locate the updated Global HTML Template.

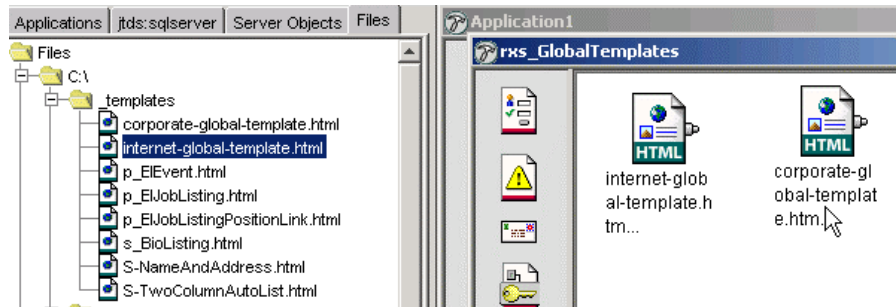


Figure 47: Updating the CI Global Template

- 4 Drag and drop the new template over the existing template and update the existing web page.
- 5 Save and close the application.

## Deleting a Global HTML Template

Deleting a web page from the rxs\_GlobalTemplate application in the workbench will delete the Global Template from the system and modify the rx\_Globals.xsl file to remove the corresponding XSL import.

---

Note: All the local variant style sheets must be modified and re-split to remove the call to the deleted global template.

---

- 1 Open the Workbench.
- 2 Open the rxs\_GlobalTemplates application.
- 3 Select the web page to be deleted.
- 4 From the Edit menu select [Cut] or press the Delete key.

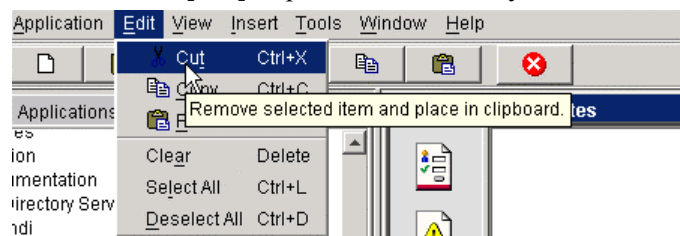


Figure 48: Deleting an Static Web Page

- 5 Save and close the application.

# Maintaining Local Templates

As discussed earlier, Local Templates generate assembled Content Items with minimal formatting wrapped by the Global Template, which includes the layout and design elements.



Figure 49: Local and Global Templates

By moving layout and design to the Global Template, the maintenance requirements for Local Templates are reduced. It is simpler to maintain Local Templates when they are free of clutter and redundant design elements. The Local Template HTML should be as simple and clear as possible.

Local Templates should:

- contain clean and conforming markup;
- include a call to the Global Template dispatcher;
- include all necessary Context Variables;
- have a prepared <head> tag; and
- include optional references to shared metadata.

Once these pieces are in place, the template is split and applied to its appropriate assembly resource.

## Customizing Local HTML Templates

As an example of a Local Template, let us examine the P - EI Generic Variant of the Generic Page ContentType. When rendered, the source HTML resembles the following:

Sidebar slot  
nav breadcrumb slot

**Display Title Item Body**  
**Related...**  
**List slot**

Figure 50: Local Template only of Event Page

The template for this Variant is intentionally simple. This page Variant contains both the List and Sidebar Slots for inclusion of related content Items.

Related Content			
<b>Slot(ID): Image Link( 308)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
EIHomeEquityCreditCard ( 442)	Image( 307)	S - Image( 302)	
<b>Slot(ID): List slot( 309)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
10 Steps to Demystifying the Mortgage( 373)	Generic( 311)	S - Title Link( 313)	
<b>Slot(ID): nav_bottom( 311)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
No entries found.			
<b>Slot(ID): nav_breadcrumb( 312)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
No entries found.			
<b>Slot(ID): nav_left( 314)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
No entries found.			
<b>Slot(ID): nav_preload( 315)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
No entries found.			
<b>Slot(ID): nav_top( 317)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
No entries found.			
<b>Slot(ID): Sidebar slot( 318)</b>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
10 Mistakes You Can't Afford( 372)	Generic( 311)	S - Title Callout Link ( 375)	

Figure 51: Table Editor for Generic Page

When combined with Site specific CSS and a Global Template, the output page looks quite different:

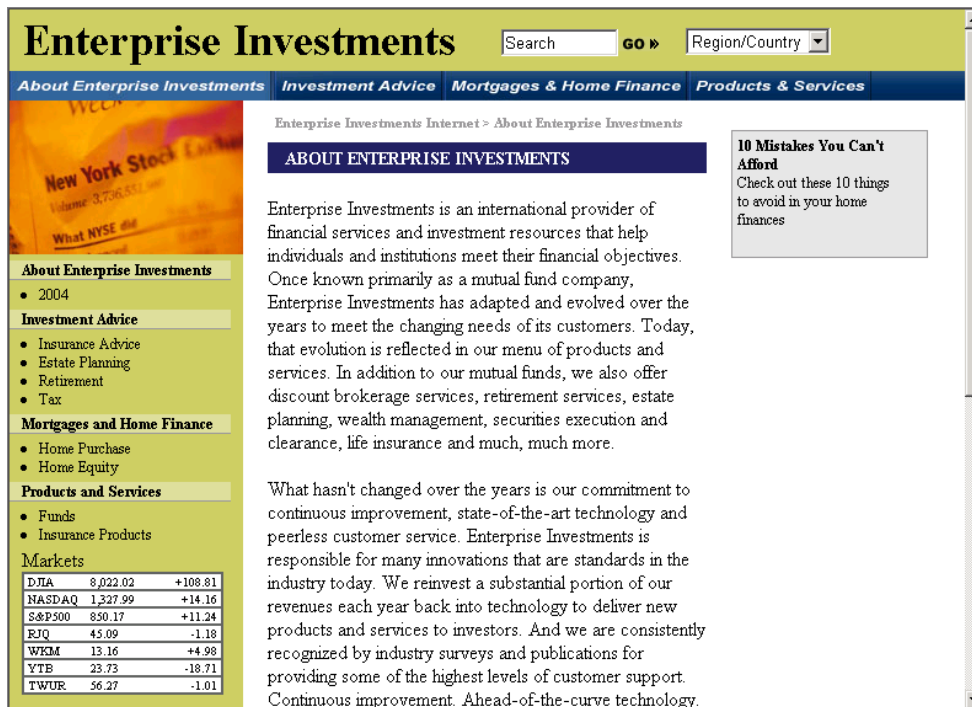


Figure 52: Event Page with Global Template

To create a Local Template HTML:

- 1 Identify and clean up the Local Template HTML.
- 2 Add a call to the Global Template Dispatcher.
- 3 Prepare the <head> tag for splitting.
- 4 Assign Context Variables to static images.
- 5 Add Slot Markup to the template.
- 6 Add the new Template to the Variant Assembler Application.

## Cleaning Up the Local Template HTML

As with the Global Template, the first task is to clean up your Local Template HTML to prepare it for splitting. Cleanup typically involves the following tasks:

- Ensure that the HTML document is well-formed. When you split the document, XSpLit runs HTML Tidy to ensure that it conforms to the requirements of a well-formed document. It is good practice, however, to ensure that the document is as tidy as possible before splitting it.
- Add any required DOCTYPE declarations.
- Remove any unnecessary inline scripting and relocate it to a separate support file. Follow the practices previously outlined for Global Template HTML.
- Remove any unnecessary inline styles and relocate them to a separate support file. Follow the practices previously outlined for Global Template HTML.

The example Local Templates provided with FastForward use XHTML and CSS to provide both formatting and layout. Using these standards makes it easier to re-use page templates and layout and design elements across multiple Sites.

If you intend for a Page Variant Template to produce XHTML output, both the Global and the Local Template HTML must themselves be XHTML compliant before splitting them in the Workbench.

## Adding the Global Template Dispatcher Call

You only need to add the Global Template Dispatcher Call to Page Variant Local Templates, but every Page Variant Local Template must include this call.

To add the Global Template Dispatcher Call, include the following XSL block at the beginning of the HTML source code:

```
<!-- begin XSL -->
  <xsl:output method="xml" omit-xml-declaration="yes"/>
  <xsl:template match="/" priority="100">
    <!-- override inner template's root to invoke the outer template
dispatcher -->
    <xsl:call-template name="psx-global-template-dispatcher"/>
  </xsl:template>
<!-- end XSL -->
<html>
...
</html>
```

## Preparing the HTML <head> Tag for Splitting

Format the <title> child element of the <head> element with the following code:

```
<title>psx-shared/displaytitle</title>
```

This code makes the Title a dynamic value, derived from the DISPLAYTITLE column of the RXS\_CT\_SHARED table. Each Content Item Page will thus have a unique title. The Title rendered when the Local Template is merged with the Global Template will be derived from this value.

XSpLit requires at least one dynamic tag to be able to split HTML, so this task also allows you to split your source HTML if you are building your Local Template HTML in stages.

## Assigning Context Variables to Static Images

All static design elements (such as spacer.gif, etc) not being managed by Rhythmyx as an Item must have Variables assigned to them for locating during Preview, Publish, etc. This process is identical to the application of the variables assigned for CSS and JavaScript files when formatting the Global Template.

To define Context Variables, locate and modify all <img> tags for static images to include a psx-src="\$rxs\_img\[file name here]" attribute.

Before:

```

```

After:

```

```

---

Note: If your editing tool supports regular expressions, the search expression, `\(src="images/([^\"]*)"\)` will locate all `src` attributes for images and the replace expression, `\1 psx-src="$rxs_img/2"` will add an additional attribute referencing the `rxs_img` variable.

The following Perl script will also simplify the template preparation of these values:

```
perl -ne 's~(src="internet-global-template/([^\"]+)~psx-src=""\$rxs_img/$2\" $1~'internet-global-template.html
```

This script expects your template to already be named `internet-global-template.htm`.

---

## Adding Slot Markup to the Template

Page Variants almost always contain Slots that include related content, and many Snippet Variants do as well. Note that for the purposes of this document, we will only use Slots that are already registered in the system. For details about adding a custom Slot, see *Customizing FastForward for Web Content Management*.

The following code shows example markup for the List Slot that is included with FastForward. Use it as a model for your Slot markup.

```
<!-- start slot List slot -->
<div class="list">
  <span class="relatedHeader">Related...</span>
  <br />
  <!-- start snippet wrapper -->
  <span psxeditslot="yes" slotname="List slot">List
slot</span>
  <br />
  <!-- end snippet wrapper -->
</div>
<!-- end slot List slot -->
```

---

Note: Slot names are case sensitive.

---

## Adding the new Local Template HTML to the Content Assembler Application

Once you have added your Slot markup to your Local Template HTML, you are ready to add it to the Content Assembler application.

To add the new Local Template HTML:

- 1 In the Rhythmyx Workbench, open the application `rxs_Shared_cas`.
- 2 On the Files tab of the Navigation bar in the Workbench, navigate to the directory where you created your Local Template HTML file.
- 3 Select the Local Template HTML file you want to add, drag it into the application and drop it on the existing template you want to replace. This action splits the file and replaces the existing template with the new one you created.



#### 4 Save the application.

To test your template, log in to Content Explorer as a user in a Community with access to the Variant you were working on, and preview a Content Item of the appropriate Content Type. If the Content Item does not look the way you want, go back to the template and apply any fixes required to return the results you want. Save and re-split the Local Template HTML file, save the application, and refresh the preview.

## Updating a Local HTML Template

If you modify a Local Template HTML, you must re-split it. To re-split the HTML:

- 1 Open the Workbench.
- 2 Open the assembly application where the template is registered.
- 3 Select the Files tab from the Workbench Navigation Panel and locate the updated Global HTML Template.

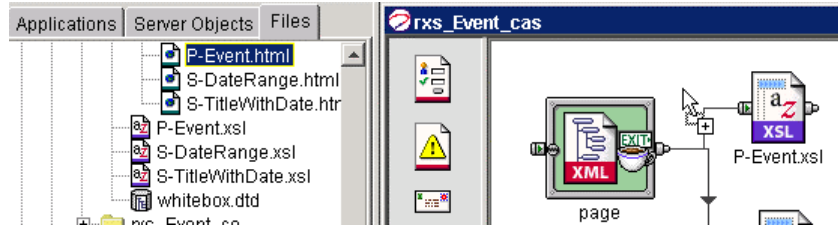


Figure 53: Updating a Template

- 4 Drag and drop the new template over the existing template and update the existing web page.
- 5 Save and close the application.

## Deleting a Local HTML Template

Unlike deleting a web page from the `rxs_GlobalTemplate` application, deleting a Local Template requires that you manually delete additional Variant registrations.

To delete a Local Template HTML:

- 1 Open the Workbench.
- 2 Open the application containing the local template.
- 3 Select the template to be deleted.
- 4 From the Edit menu select [Cut] or press the Delete key.

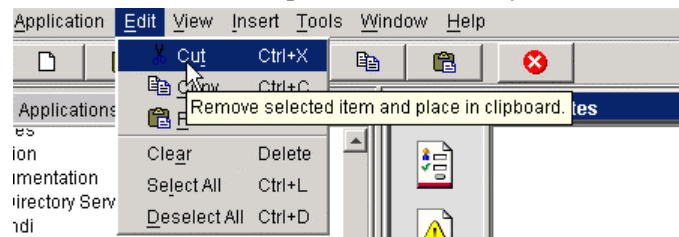


Figure 54: Deleting an Static Web Page

- 5 Save and close the application.
- 6 Log into the Content Explorer and navigate to the System Administrator.
- 7 Select the Communities [by name] link in the left panel and open any community that once referenced the Variant registration referencing the recently deleted template.



*Figure 55: Communities by Name*

- 8 Select the [Variants] link within each Community and delete any references to the Variant referencing the recently deleted template.
- 9 Select the Slots [by name] link in the left panel and remove the Variant registration referencing the recently deleted template from any Slots.



*Figure 56: Slots by Name*

- 10 Select the Variants [Variant name where the template was registered] link from the left panel and remove the Variant registration referencing the recently deleted template.

## CHAPTER 4

# Sites and Managed Navigation

Seamless and intuitive navigation through a web site assures its visitors a successful interaction. Site navigation is typically comprised of a combination of the following navigation elements:

- top navigation bar
- side navigation
- bottom navigation
- breadcrumbs
- a Site map

Effective employment of these elements adds to a site's ease of use.

The screenshot displays the Enterprise Investments website with several navigation elements highlighted by red boxes and labeled with arrows:

- Top Navigation:** A horizontal bar at the top containing the site logo, a search box, a "GO" button, and a "Region/Country" dropdown menu.
- Breadcrumbs:** A path "Enterprise Investments Internet > About Enterprise Investments" located below the top navigation bar.
- Left Navigation:** A vertical menu on the left side with categories like "About Enterprise Investments", "Investment Advice", "Mortgages and Home Finance", "Products and Services", "Markets", and "Rates".
- Bottom Navigation:** A horizontal bar at the very bottom of the page with the same category links as the top navigation bar.

The main content area features a heading "ABOUT ENTERPRISE INVESTMENTS" and several paragraphs of text. A small box on the right side contains the text "10 Mistakes You Can't Afford" and "Check out these 10 things".

Figure 57: Press Release with Side Navigation Menu and Breadcrumbs

FastForward provides a Managed Navigation system that makes it easy to add navigation elements to a Web Page. This system is based on three navigation Content Types.

**Navon** - Items used to create navigation menus including breadcrumbs, bottom, side and top navigation, and site maps. Each Navon should be linked to a Content Item not used for Navigation (such as a Generic Page or a Category Content Item). A Navon may also be associated with a NavImage (see below).

**NavTree** - Similar to a Navon. NavTree Items reside at the root of a Site. These Items initiate the propagation of Navons to every sub folder in the Site Tree. The NavTree Item is generally linked to the Site's Home Page Item.

**NavImage** - Images used by Navons to replace text links for navigation elements. NavImages are also used by several Content Types to provide Image Links.

The About Corporate Investments Generic page Content Item, for example, contains a side navigation menu, breadcrumbs, and a bottom navigation menu (which is not visible in the diagram above). The Rhythmyx Managed Navigation system will automatically generate these elements based on the Site Folder path of the Item and its relationship to navigation Items such as a NavTree and Navon. A Site Folder is a Folder defined in the Content Explorer under the Sites node. This folder generally represents a folder within a web site's directory structure. The Item being previewed is in a Site Folder named About Corporate Investments.

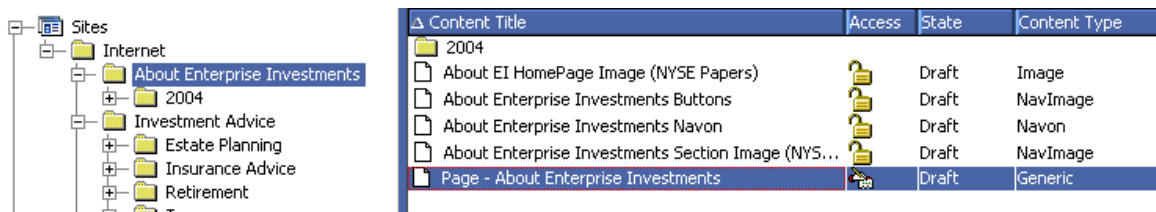


Figure 58: Press Release Item in 2004 Site Folder

This Folder may or may not have additional Subfolders. Each of these Folders and Subfolders may contain navigation Content Items.

Content Title	Access	State	Content Type
2004			
About EI HomePage Image (NYSE Papers)		Draft	Image
About Enterprise Investments Buttons		Draft	NavImage
About Enterprise Investments Navon		Draft	Navon
About Enterprise Investments Section Image (NYS...)		Draft	NavImage
Page - About Enterprise Investments		Draft	Generic

Figure 59: Navon for 2004 Press Releases

These elements control how (and whether) the Folder is represented in a navigation menu.



Figure 60: Folder and Navon Result in Navigation Structure

Folders that contain a Navon or NavTree Content Item are generally rendered as a menu Item. If a NavImage is associated with the Navon or NavTree Item, this image will be represented in the top navigation.

---

Note: The out-of-the box solution for a top navigation Snippet requires a NavImage to render a visible representation of the Item. All other navigation Snippets use text values.

---

Finally, if either the Navon or NavTree Item has Content Items assigned to its landing page Slot, the menu link will target the specified page and provide links to the navigation section.

Rhythmyx provides out of the box solutions for common navigation menus. In addition, intuitive XML Variants allow you to develop customized navigation when the standard solutions do not apply. Though a Flash driven navigation menu is not provided by Percussion, the XML necessary to implement such an application is available out of the box.

As shipped, Managed Navigation allows implementers to create common navigation based on the Site's Folder structure without the need for complex XSL. A combination of specialized Communities, Content Types, and Effects provides implementers with the capability of implementing a variety of navigation structures while masking the complexities of Managed Navigation from Content Contributors. Implementers and Web Masters can use the Managed Navigation elements to create new sections of the Site, move pages from one section to another, change the navigational label or image on a section, reorder sections, and if necessary remove sections from the navigation menu completely.

Managed Navigation relies on Site Folder Publishing to deliver the Items organized with a Site's set of folders. Managed Navigation will not function if you have not used a Site Folder to structure your content.

## How Managed Navigation Works

Managed Navigation uses NavTrees and Navons to represent a Site's Folder hierarchy, which mimics the directory structure of your Web site. The Managed Navigation Content Items build XML documents that describe

- the Site's hierarchy;
- the location of each Navigation Content Item within that hierarchy;
- The relationship between an individual Managed Navigation Content Item and surrounding Managed Navigation Content Items; and
- whether an image is associated

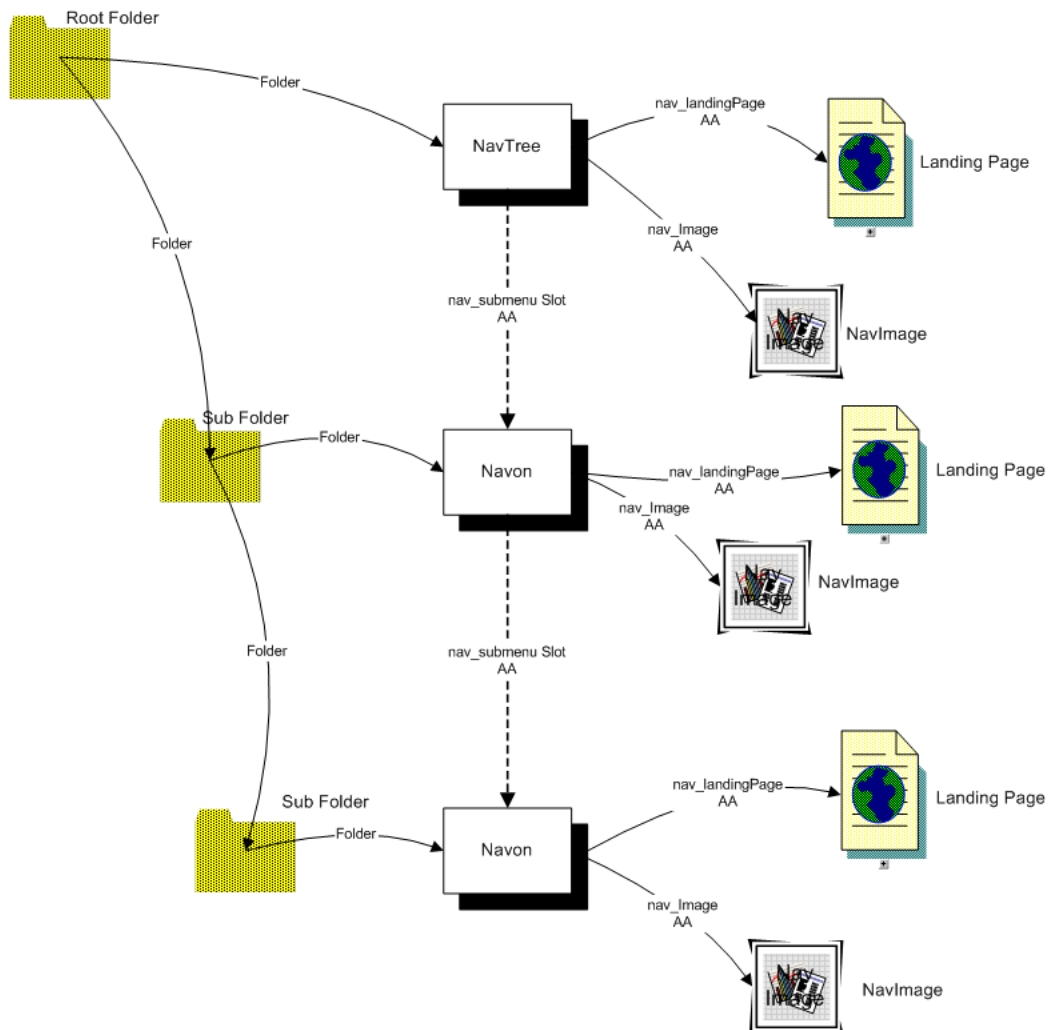


Figure 61: Relationships between Navigational Elements

During assembly, an XSL stylesheet parses this XML file and builds the navigation for each page. The resulting piece of navigation is added to a Slot on the Page like any other Snippet. Depending on how the XML is processed by the XSL, it may be generated into any navigation element. Any code or application that can process XML can be used to build the navigation for a page, or the navigation XML can be published to a file system or a database.

Let's look at a typical page with navigation. The page might have a top navigation, side navigation, bottom navigation, and breadcrumbs.

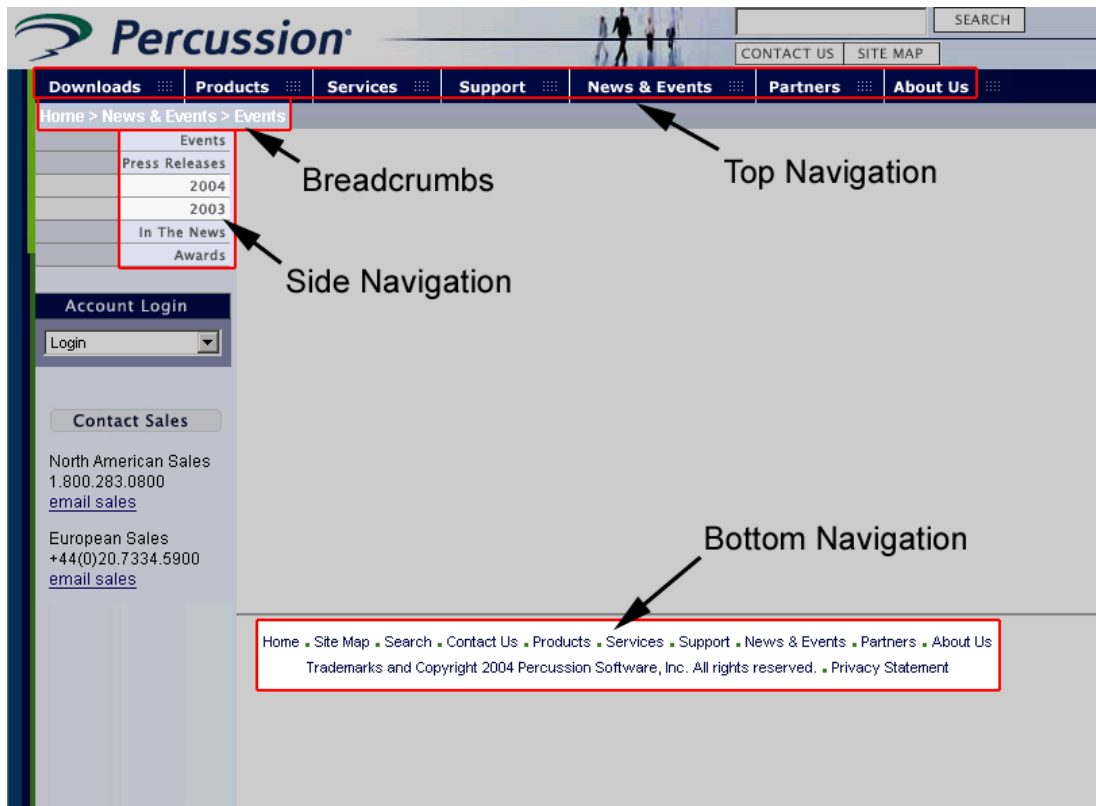


Figure 62: Page with Navigation

Within Rhythmyx, each of these pieces of navigation is represented by a separate Snippet Variant. Each Variant is registered to the Navon Content Type. The Breadcrumb Snippet, for example, renders a relatively format-free HTML document when previewed separately.

[Home](#) > [News & Events](#) > [Press Releases](#)

Figure 63: Breadcrumbs Without Formatting

When integrated into a Page, this Snippet inherits the look and feel of the page it's on.



Figure 64: Page with Breadcrumbs

## Navigation Communities

The administrative Communities shipped with FastForward are intended to organize and provide access to administrative Rhythmyx applications used by Web Masters, producers, or other administrators responsible for maintaining the structure and navigation of one or more Sites.

- Enterprise Investments Admin
- Corporate Investments Admin

Within either of these Communities, the Rhythmyx Administrator can design, build, and control a site's structure by adding, removing and editing Site Folders and their properties.

## Navigation Reset

It is often necessary to use the *Nav Reset* action in the Action Menu when maintaining Site Folders or Managed Navigation. This Action flushes the cache on the Navigation Content Items. When maintaining Managed Navigation or Site Folder structures, existing configurations remain stored in the cache, and you must refresh the cached data to ensure that Previews work correctly. Published content is not affected by this cache.

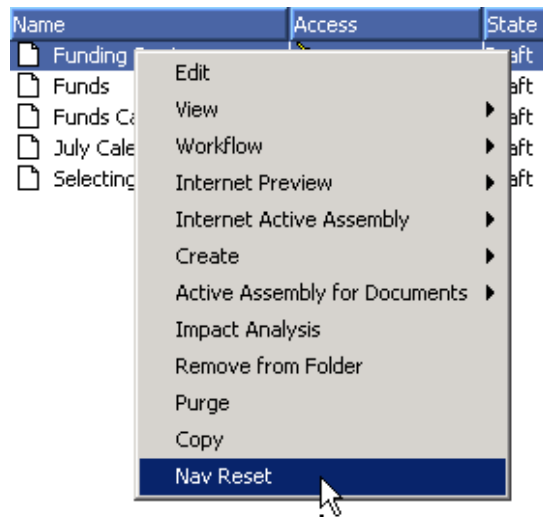


Figure 65: Resetting Navigation XML

The rule of thumb for determining whether to flush the Navigation cache is to flush it whenever you make a structural change to the navigation. Examples of such changes include:

- Editing navigation.properties;
- Dragging a sub folder to a new folder;
- Editing metadata in a Navon;
- Adding new Sections that appear in the navigation.

To flush the navigation cache:

- 1 Select any Item within any Site Folder in a Site where structural changes have been made to the navigation.



- 2 Right click the Item and select [Nav Reset].
- 3 Press [OK] in the reset pop up dialog.

---

Note: Clearing the navigation cache will cause a slow down in subsequent previews of Content Items until the navigation information is once again cached.

---

---

## Using Managed Navigation

Managed Navigation comes fully configured and implemented in FastForward, so it is fairly simple to use. The most common tasks performed when maintaining Managed Navigation are

- Adding new Items to a Site;
- Removing Items from a Site;
- Resetting Navigation;
- Adding new Sections to a Site;
- Removing Sections from a Site;
- Publishing a Site.

Additionally, you may occasionally have to maintain individual Managed Navigation Content Items while maintaining your Site. Such tasks include:

- Assigning a Landing Page to a Navigation Item;
- Creating a NavImage;
- Assigning a NavImage to a Navigation Item;
- Reordering Navigation Sub Menus.

When initially creating a Site, you will need to

- Create a Publishing Site;
- Create a Site structure, including a Site root and Subfolders.

## Setting up a Site

Setting up a Site entails two main tasks:

- Registering a Publishing Site
- Setting up Site Folders
  - Define a Site Root Folder
  - Build Site Structure

## Creating a new Publishing Site

The Site registration defines where a Site Tree will be published.

Site(id): (301)	
*Site Name	Internet
Description	Represents the Internet web site
Site Address (URL)	http://127.0.0.1:9980/internet/
Home Page (URL)	
Publishing Root Location	../AppServer/webapps/internet
*Publisher	Localhost Publisher Default Port ▾
Status	Active ▾
Folder Root	//Sites, Extranet
Global Template	internet-global-template ▾
Nav Theme	
<b>FTP Information:</b>	
IP Address	127.0.0.1
Port Number	21
User ID	
Password	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 66: Registering a Publishing Site for Site Folder Publishing

The Site Folder Root field defines Site Root Folder in Content Explorer with which the Site will be associated. You should determine the name of the Site and of the Site Root Folder before proceeding further. It is common for these two values to be identical.

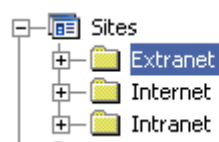


Figure 67: Extranet root Site Folder

To define a Site registration:

- 1 Log into the Content Explorer.
- 2 Navigate to the Publishing Administrator. In the left navigation, under Sites, click the By Name link.
- 3 Click the New Site link.
- 4 Note the name of the new root Site Folder. From our previous example, the new root Folder is titled, Extranet.
- 5 Enter the values for your new Site. In the Root Folder field, enter `//Site/<SiteRootFolderName>` (For example, `//Sites/Express Investments`).
- 6 Save the new Site registration.

## Creating Site Structures in Rhythmyx

The first step to configuring Managed Navigation is to create a Site Folder structure. A Site Folder structure consists of a Site root and any Subfolders added to it. Typically, the Folder structure of a Site in Rhythmyx mirrors the physical directory structure of the Web site. The Site Folders setup in the Content Explorer represent the virtual site as used and previewed by Content Contributors.

FastForward ships with two pre-defined Site Folder Structures, Enterprise and Corporate Investments.

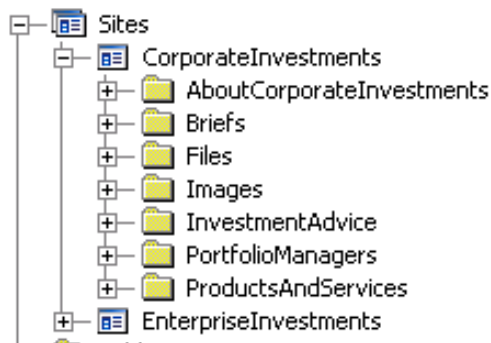


Figure 68: Default FastForward Sites

You can create additional Sites by adding new Site Folder root directories and populating them with content.

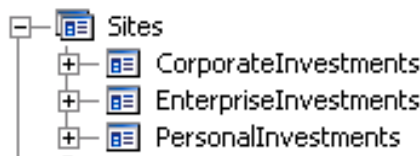


Figure 69: Adding a New Site

## Creating a Site Folder for a New Site

The first step in defining a Site Folder hierarchy is to create the root Site Folder. This Folder serves as the highest point in the navigation hierarchy of a Site. Though you can define multiple Site Root Folders, each is the root of a unique Site. Any individual Site can have only one root.

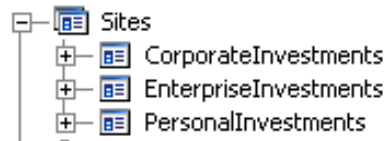


Figure 70: Adding a New Site

The root folder defines the anchor point for the Site's navigation scheme.

To create a Site Root Folder

- 1 Log into the Content Explorer.
- 2 Right click the Sites node in the Navigation Panel and select [New Folder...].

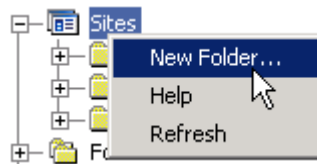


Figure 71: Creating a new Site Folder

Rhythmyx displays the Folder Properties dialog.

- 3 Fill in the fields for the new Folder accordingly.
- 4 Click the [OK] button to save the new Folder.
- 5 If you have not already *created Site registration* (see "[Creating a new Publishing Site](#)" on page 81), do so now. The Site registration is required to publish the Site.

## Creating a Site Folder in an Existing Site Tree

It is often necessary to add additional Site Folders to a Site. Users with administrative rights to a Site Root Folder can create Folders within the site.

---

Note: This activity assumes a Site and Navigation Items already exist.

---

To create a new Site Folder:

- 1 Expand the Site Tree until you find the Folder within which you want to create the new Site Folder.

- 2 Right-click the Folder and from the popup menu, choose *New Folder*.

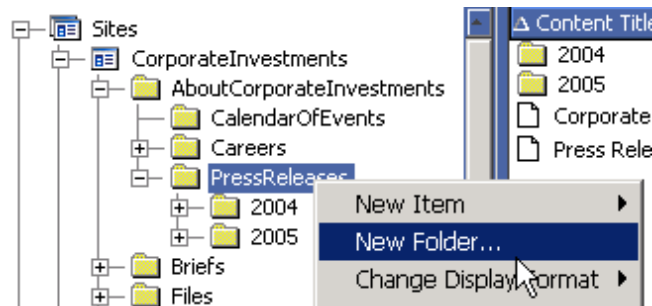


Figure 72: Creating a New Site Folder

- 3 Rhythmix displays the Folder Properties dialog. Fill in each field.

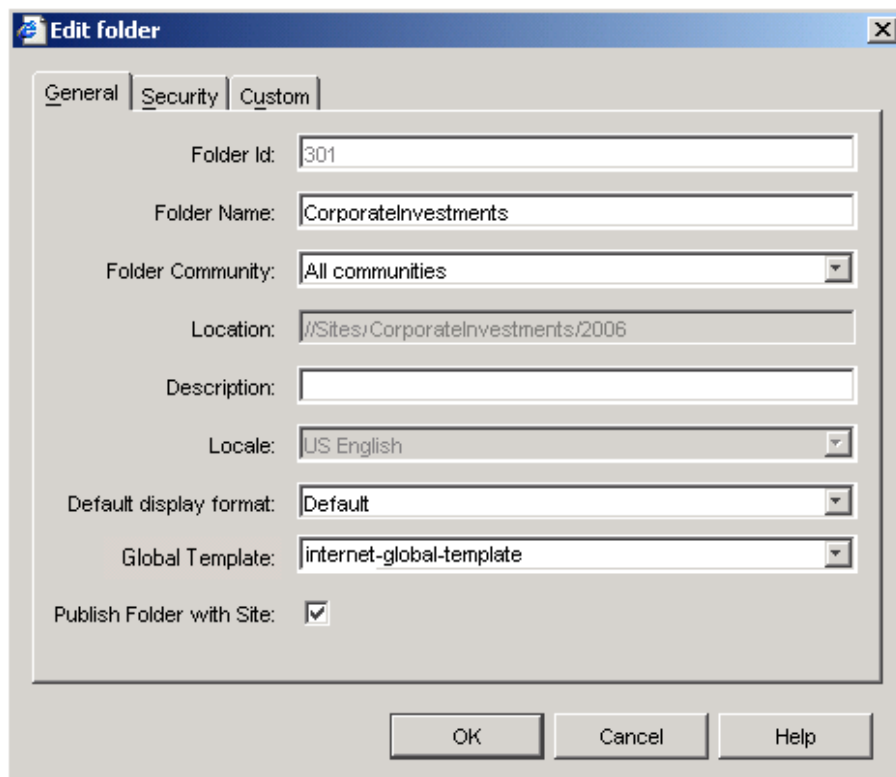


Figure 73: Create Folder General Tab

**Folder Name** - The name to be displayed in the Navigation Pane next to the Site Folder. This name will also be used to name the directory on the Publishing Site. If you want to use a different value for the name of the output directory, specify the custom property `sys_pubFileName` on the Properties tab. For the value of this property, specify the name you want for the output directory. If you change this value, you will need to initiate a Full Publish to reflect the results in the output directory. Incremental publishing will not pickup changes to this attribute.

**Folder Community** - Communities allowed to access the Folder. A Community not defined in this list will not be able to see the folder in the Content Explorer's Navigation Panel.

**Description** - A brief note describing the Folder.

**Locale** - The default Locale for the Folder.

**Default Display Format** - When a user selects the Folder, Items in the folder will be displayed using the specified Display Format.

- 4 Click on the Security Tab. Add or remove Users or Groups as necessary.
- 5 Click on the Properties Tab. This dialog allows the Folder Admin to assign Name Value pair properties to the Folder. Currently, sys\_pubFileName is the only property available to users.
- 6 Click the [OK] button to create the new Site Folder.
- 7 Reset the Navigation.

If the new Folder is created within a defined Site Tree that contains a NavTree Item at its root, a Navon Item will be generated automatically in the new Folder. The new Navon will take on the Site Folder's name as its System Title.

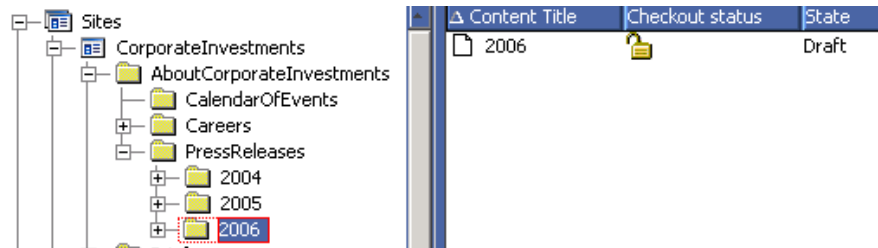


Figure 74: New Navon Created in a New Site Folder

The Navigation for the Site will now include a reference to the new Folder.

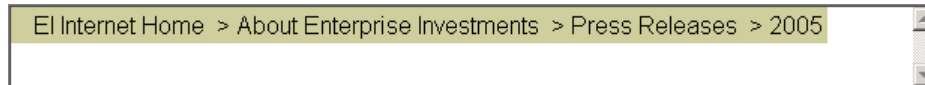


Figure 75: Breadcrumbs to New Navigation Section

## Adding a new Folder within an Existing Site

In some cases, you may want to create a Folder that is not included in the Navigation hierarchy of the Site. For example, you may want to create a Folder specifically to store images for your Site. Such Folders are generally not included in navigation. To exclude a Folder from Navigation, purge the Navon created in the Folder when you create the Folder.

To create a Folder without navigation:

- 1 Create a new Folder as described in *Creating a Site Folder in an Existing Site Tree* (see "[Adding a new Folder within an Existing Site](#)" on page 85).

If the Folder is created within a Site Tree that contains a NavTree Item at its root, a Navon Item will automatically be generated within the new Navigation Section.

- 2 Open the new Folder, select the Navon Item, right click on it, and choose Delete from the popup menu. This action removes the Content Item from the Folder.

---

NOTE: It is strongly recommended that you purge this Navon Content Item. Stray Content Items contribute to clutter that can make your Suite structure difficult to navigate in Content Explorer. Also, if the Navon is somehow added back to the Folder, the Folder itself will be added back into the Site navigation.

---

## Assigning Permissions to a Site Section

In addition to access control via assigned Community, you can also assign different permissions to users in the Folder Access Control List (ACL) itself. If a user can access a Folder, they can always see the Content Items in that Folder, but the user's rights to any specific Content Item are controlled by its current Workflow State.

To maintain permissions for a Folder, click the Security tab on the Folder Properties dialog.

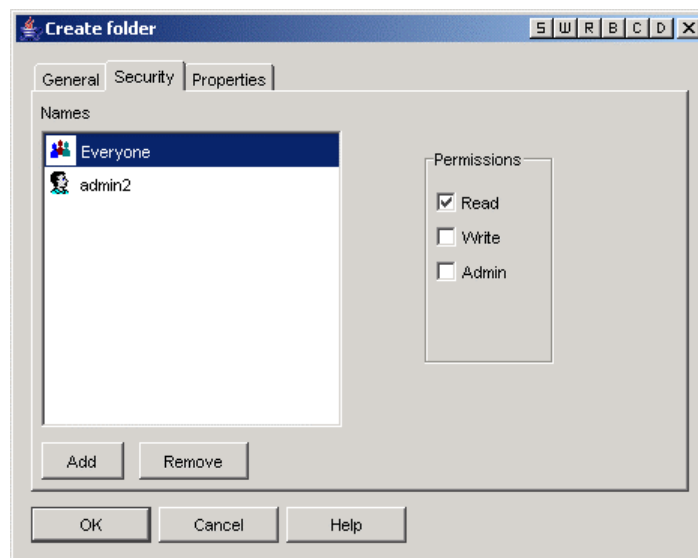


Figure 76: Create Folder Security Tab

By default, the Everyone Group is issued Read permissions. This allows users not previously defined to have additional rights to see the contents of the new Folder. The user who created the Folder is issued Read, Write, and Admin rights to the Folder. This allows the user to see the contents of the Folder, add Items to the Folder, and change the Folder's properties. In addition, the Admin permission allows the user to delete the folder.

You can add permissions for additional users or Roles. Click the [Add] button and select the additional user or Role you want to add to the Folder ACL.

The following levels of security are available for Folders:

- *Read* - Permits users to view the folder and its contents. Does not allow users to move, copy, or add contents to the folder. Lets users copy but not move contents in the folder to another folder. Lets users view folder properties.
- *Write* - Permits users to view, copy, and move the folder, but not delete it, and to view, copy, move, or add contents. Lets users view folder properties.



- *Admin* - Gives users all Write permissions and enables them to delete the folder's sub-folders and to edit all folder properties.

If you have Write or Admin permission for a folder, when you right-click on the folder the option *New Folder* is available to you to create a Subfolder, and the option *Properties* lets you view or edit the selected folder's properties.

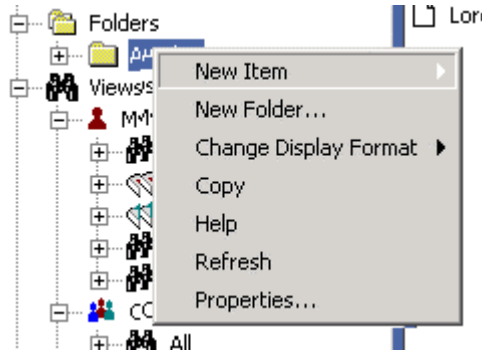


Figure 77: Folder actions menu

If you have read access to a folder, the *New Folder* option is not available to you and the option *Properties* lets you view the selected folder's properties.

The Community of the Folder also affects the user's access to it.

	<b>Folder in User's Community</b>	<b>Folder not in User's Community</b>
<b>User not in Folder ACL</b>	User cannot see Folder.	User cannot see Folder.
<b>Reader Access</b>	User can see Folder and Content Items in Folder. User cannot: create new sub-Folders in Folder; delete sub-Folders from Folder; create new Content Items in Folder; remove Content Items from Folder.	User cannot see Folder.
<b>Write Access</b>	User can see Folder and Content Items in Folder. User can create new Content Items in Folder. User can remove Content Items from Folder. User can create new sub-Folders. User can delete sub-Folders.	User cannot see Folder.

	<b>Folder in User's Community</b>	<b>Folder not in User's Community</b>
<b>Admin Access</b>	User has all privileges of a user with Write access. In addition, the user can modify the Folder's ACL.  NOTE: Any user with Admin access to the Rhythmyx server automatically has Admin access to all Folders, regardless of the Folder ACL.	User cannot see Folder.
<b>Empty ACL</b>	This is not a desirable setting. All users in the system will have Write access.	User cannot see Folder.

Content Items are always visible regardless of Community. Permissions for an individual Content Item (such as View, Modify, Purge) are based on the current Workflow State of the Content Item.

## Editing a Site Section

Users with Admin rights to a Folder can modify its properties. All fields and properties can be modified except Locale, which is locked once the Folder has been created.

To edit a Folder's properties:

- 1 Log into the Content Explorer.
- 2 Right click on the Folder whose properties you want to modify and from the popup menu, choose *Properties*.
- 3 Modify any Folder Properties as needed.

## Deleting a Site Folder Section

When you delete a Site Folder, the association between the Folder and its contents is broken. The Content Items are not purged, but remain in the system, and in any other Folder with which they are associated.

Note that any Navigation Items in the folder will need to be associated with a different Site Folder or deleted. Orphaned Navigation Items can cause problems if they are assigned to another Folder unintentionally.

To delete a Site Folder:

- 1 Log into the Content Explorer.
- 2 Find the Site Folder you want to delete.
- 3 Move a Content Items to another Folder, and remove or delete any Managed Navigation Content Items from the Folder.
- 4 Right click the Site Folder and on the popup menu, choose *Remove from folder*.  
Rhythmyx deletes the Folder.

---

## Adding Navigation to Rhythmyx Site Folders

Once you have created Site Root Folder and any Site Subfolders, you can add Managed Navigation Content Items to provide Navigation for your site. You can then assign landing pages to NavTree and Navon Content Items, and fine tune navigation submenus.

You can start adding Navigation by adding a NavTree Content Item to the Site Root Folder. You can add this Content Item either before or after creating Site Subfolders.

### Creating a NavTree

NavTree Content Items reside in the root Site Folder for a given Site. The NavTree Content Item denotes the root of a Site and is responsible for propagating Navons through the `sys_navFolder` Effect. This effect generates Navon Items in the Site Folders below the root and establishes relationships between each of these Items. The result is a navigation hierarchy linking all levels of the Site together.

To create a NavTree:

- 1 Log into the Content Explorer.
- 2 Locate the Site Folder Root where you want to create the NavTree. Note that this Folder cannot already have a NavTree Content Item. If a Site Root Folder already contains a NavTree Content Item, Rhythmyx will generate an error when you try to add the new NavTree Content Item to the Repository.
- 3 Right click the Site Folder and from the popup menu choose *New Item > NavTree*.
- 4 Fill in the data for the Content Item.
- 5 Checking the "Propagate" check box to add Navons to any existing Site Subfolders. Rhythmyx will always add Navons to new Site Subfolders you add after adding a NavTree to a Site Root Folder.
- 6 Click the **[Insert]** button to add the NavTree to the Repository, then close the Content Editor.

### Creating a Navon

Navon Content Items are generally created automatically but the `sys_navFolder` Effect. In some cases, however, you may need to create Navons manually. Once you create a Navon, the `sys_navFolder` Effect will create all necessary relationships between the new Navon and existing Items.

To create a Navon:

- 1 Log into the Content Explorer.
- 2 Open the Site Folder where you want to create the Navon.
- 3 Right click the Site Folder and from the popup menu, choose *New Item > Navon*.
- 4 Rhythmyx displays the Navon Content Editor.

- 5 Enter data in all of the Content Editor fields. There is no reason to check the **Propagate** checkbox when creating this Item.
- 6 Insert the Navon Content Item and close the Content Editor.

## Assigning a Landing Page to a Navon

Navons represent the Folder in which they reside in any piece of navigation (breadcrumb, top navigation, site map, etc). When a site visitor selects a link in a piece of navigation, they are directed to a particular page, referred to as the "landing page". You must manually associate a landing page with each Navon.

To assign a landing page to a Navon:

- 1 Navigate to the Navon to which you want to add the landing page.
- 2 Right click the Item and from the popup menu choose *Active Assembly Table Editor*. (If the Navon is already Public, you may have to Transition it to the Quick Edit State before this option is available.)

Rhythmyx displays the Active Assembly Table Editor for the Navon.

- 3 Click on the nav\_landing\_page link.

Rhythmyx displays the Active Assembly Search dialog.

- 4 Find the Content Item you want to assign as the landing page for the Navon, check the box for that Content Item and click the [**Link to Slot**] button.
- 5 Close the Active Assembly Table Editor
- 6 If the Navon was edited in a Public State, Workflow the Item back to the Public State.

## Removing a Landing Page from a Navon

A Navon should only have one Content Item in its landing page Slot. If you want to assign a different landing page for the Navon, you should remove the existing landing page before assigning a new one.

To remove the landing page from a Navon:

- 1 Locate the Navon from which you want to remove the landing page.
- 2 Right-click on the Navon and from the popup menu choose *Active Assembly Table Editor*.  
Rhythmyx displays the Active Assembly Table Editor.
- 3 Click the delete button next to the Content Item that is currently assigned to the landing page Slot.  
Rhythmyx processes your request and returns you to the Active Assembly Table Editor.
- 4 You can add the new landing page immediately if you link.
- 5 Close the Active Assembly Table Editor.

## Creating a NavImage

NavImage Content Items support the use of images in navigation. If you want to represent a section of your site with an image, you must create a NavImage Content Item and include it as related content in the `nav_image` Slot on the NavTree or Navon Content Item. It is usually easier to find a NavImage if it resides in the same Site Folder as the Navon or NavTree that uses it, but it is not required to reside there.

A NavImage Content Item requires an Image file. You must assign this file to the NavImage.

If any given navigation element uses text links instead of images, you do not need to create a NavImage for it.

To create a NavImage

- 1 Log into the Content Explorer.
- 2 Locate the Site Folder where you want to create the NavImage.
- 3 Right click the Site Folder and from the popup menu, choose *New Item > NavImage*.  
Rhythmyx displays the NavImage Content Editor.
- 4 Fill in the fields for the new NavImage Content Item.
- 5 Insert the Item and close the Content Editor.

## Assigning a NavImage to a Navon

Once you have created a NavImage, you can assign it to a Navon. NavImages are assigned to the `nav_image` Slot on the Navon. In the default FastForward installation, NavImages are used in the `top_nav` Variant to represent the Navon's Folder, and are a hotspot link to the Navon's landing page.

The `top_nav` Variant is the only Navigation Variant in the default FastForward implementation that supports images, but you can modify other Variants to support images as well. You could also implement new Variants to support combinations of images, text, and Flash.

Note that you can use essentially the same procedure to assign a NavImage to a NavTree.

To assign a NavImage to a Navon:

- 1 Log into the Content Explorer.
- 2 Locate the Site Folder containing the Navon to which you want to assign the NavImage.
- 3 Right-click the Navon and from the popup menu choose *Active Assembly Table Editor*. (If the Navon is already Public, you may have to Transition it to the Quick Edit State before this option is available.)  
Rhythmyx displays the Active Assembly Table Editor for the Navon.
- 4 Click on the [nav\\_image](#) link.  
Rhythmyx displays the Active Assembly Search dialog.
- 5 Find the NavImage Content Item you want to assign to the Navon. check the box for that NavImage, and click the [Link to Slot] button.
- 6 Close the Active Assembly Table Editor

- 7 If the Navon was edited in a Public State, Workflow the Item back to the Public State.

## Removing a NavImage from a Navon

By default, removing a NavImage from a Navon eliminates representation of the Navon in the top navigation. The Navon will continue to render links in all other navigation elements.

Note that you can use essentially the same procedure to remove a NavImage from a NavTree.

To remove a NavImage from a Navon

- 1 Locate the Navon with the desired NavImage.
- 2 Right-click on the Navon and from the popup menu choose *Active Assembly Table Editor*. Rhythmyx displays the Active Assembly Table Editor.
- 3 In the `nav_image` Slot, click the delete button for the NavImage you want to delete.

---

Note: The `nav_image` Slot may contain multiple images. Be sure to delete only the desired NavImage from the Slot. Use the preview icon to the right of the NavImages to confirm selection of the image.

---

Rhythmyx processes your request and returns you to the Active Assembly Table Editor.

- 4 Close the Active Assembly Table Editor.

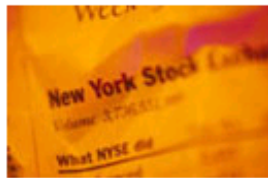
In the default FastForward implementation, the `nav_HomeImage` Snippet is used only on Home Page Content Items. You can modify this Variant so you can apply it to other pages.

The `nav_HomeImage` Snippet is a Variant of Navon. This variant produces a title link to the page placed in the Navon's `nav_landing_page` Slot.

[About Enterprise Investments](#)

*Figure 78: nav\_HomeImage without Image*

In addition, this Snippet has a Slot, titled Home Image, to which you can assign a NavImage. This image also becomes a hyperlink to the Landing Page. The combination of these two Snippets yields the `nav_HomeImage` Snippet.



[About Enterprise Investments](#)

*Figure 79: nav\_HomeImage Snippet*

Once assembled, this Snippet (along with a few others) is placed onto the Home Page and is used as a supplemental graphical navigation.

To assemble a `nav_HomeImage` Snippet:

- 1 Log in to Content Explorer and navigate to the About Enterprise Investments Folder.

- 2 Create the NavImage Content Item in this Folder, adding the image you want to use in the nav\_HomeImage Snippet. In our example, we are using the NYSE Paper NavImage from the FastForward Sample Content.
- 3 Locate the Navon for the Site Section to which you want to link. In our example, we are using the About Enterprise Investments Navon.
- 4 Right click on the Navon and from the popup menu choose *Active Assembly Table Editor*.

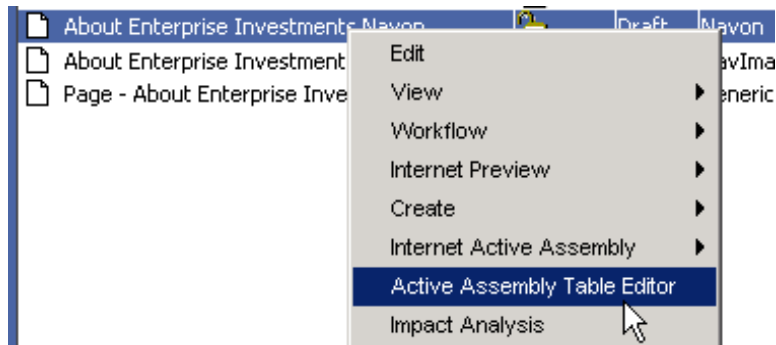


Figure 80: Opening the Table Editor for a Content Item

- 5 Locate the Home Image Slot and add the newly created About Enterprise Investments Image to the Slot.

Related Content			
Slot(ID): Home Image( 301)			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
About EI HomePage Image (NYSE Papers)( 481)	Image( 307)	S - Image( 302)	

Figure 81: Adding an Image to the Home Image Slot

- 6 Close the Active Assembly Table Editor.

This produces a Snippet illustrated above. This Snippet will be added to the top\_nav Slot and when clicked directs the user to the About Enterprise Investments Folder.

## Preview the Bottom Navigation

The default bottom navigation element in the FastForward sample implementation produces an single row of text links to first-level Site sections defined in the Site Tree. We can preview the bottom\_nav Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

To preview the nav\_bottom Snippet:

- 1 Log into the Content Explorer.
- 2 Locate the Navon you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > nav\_bottom*.
- 4 When you have finished the preview, close the window.

## Preview the Bread Crumb Navigation

The default breadcrumb navigation element in the FastForward sample implementation produces an single row of text links to Site Sections defined in the Site Tree. You can preview the `nav_breadcrumb` Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

To preview the `nav_breadcrumb` Variant:

- 1 Log into the Content Explorer.
- 2 Locate the Navon you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > nav\_breadcrumb*.
- 4 When you have finished the preview, close the window.

## Preview the Left Navigation

The default left navigation element in the FastForward sample implementation produces an expanding list of text links to Site sections defined in the Site Tree. When you click on a link, it expands to show the next level of links. We can preview the `nav_left` Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

To preview the `nav_left` Snippet:

- 1 Log into the Content Explorer.
- 2 Locate the Navon you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > nav\_left*.
- 4 When you have finished the preview, close the window.

## Preview the Site Map

The default Site Map navigation element in the FastForward sample implementation produces an hierarchical list of text links to Site Sections defined in the Site Tree. We can preview the `nav_sitemap` Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

Unlike the other navigation Snippets, the Site Map is a Variant of the NavTree Content Type.

To preview the `nav_sitemap` Snippet:

- 1 Log into the Content Explorer.
- 2 Locate the NavTree you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > nav\_sitemap*.
- 4 When you have finished the preview, close the window.



## Preview the Top Navigation

The default top navigation element in the FastForward sample implementation produces a single row of image links to Site Sections defined in the Site Tree. We can preview the `top_nav` Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

To preview the `top_nav` Snippet:

- 1 Log into the Content Explorer.
- 2 Locate the Navon you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > top\_nav*.
- 4 When you have finished the preview, close the window.

The default `nav_HomeImage` element in the FastForward sample implementation produces a title linked to the landing page defined in the `nav_landing_page` Slot for the Navon. We can preview the `nav_HomeImage` Variant to get a rough idea of how it will look on the assembled page. The final formatting depends on the assembly of the Snippet in the final page and on the Global Template used to render the page.

To preview the `nav_HomeImage` Snippet:

- 1 Log into the Content Explorer.
- 2 Locate the Navon you want to preview.
- 3 Right click on the Item and from the popup menu choose *Preview > nav\_HomeImage*.
- 4 When you have finished the preview, close the window.

## Maintaining a Site

Once you have defined your Site structure and added navigation, you can add content. You can either move existing Content Items into the Site Folders, or you can create new Content Items in the Folders. In fact, it is common for both tasks to occur when setting up a Site. Neither method has any advantages nor disadvantages over the other. The choice between the two tasks is merely a matter of convenience.

### Adding Content to a Site Folder

When a Content Item does not yet exist, you should add it to a Site Folder when you create it. Creating Content Items directly in the Site Folders eliminates the need to drag them from Views or search results into the Folders.

To create a Content Item in a Site Folder:

- 1 Log into the Content Explorer.
- 2 Locate the Site Folder where you want to create the Content Item.
- 3 In the Navigation pane, right-click on the Folder where you want to create the Content Item and from the popup menu choose *New Item* > *<Content Type>* where "Content Type" is the name of the Content Type of the new Content Item you want to created.

Rhythmyx displays a Content Editor for the specified Content Type.

- 4 Enter the data for the Content Type and click the [**Insert**] button to add the Content Item to the Repository.
- 5 Close the Content Editor.

Your new Content Item will be added to the Folder you specified. It is not restricted to this Folder. You can move it or place additional links to it in other Folders as well.

### Assigning a Content Item to Site section

If a Content Items already exists, you can move it or add it to other Site Folders, including Folders under different Site Roots. Publishing each Site creates a distinct page from the Content Item for that Site, formatted using the Global Template specified for that Site.

To move a Content Item from one Folder to another:

- 1 Log into the Content Explorer.
- 2 Locate the Content Item through any standard View or Search.
- 3 Expand the Site Folder for the target Site and locate the target Site Folder.

- 4 Left click and drag the Content Item into the desired Site Folder.

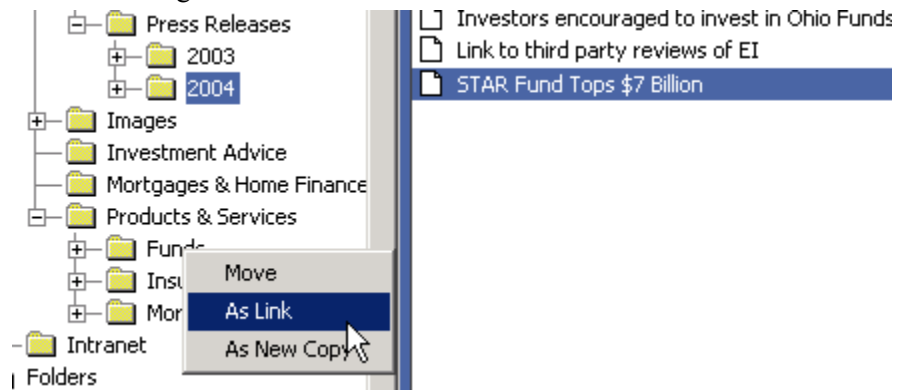


Figure 82: Dropping Item As Link in a Site Folder

- 5 When you release the mouse button, Rhythmyx displays a popup menu with three options:
- Move - This option moves the Content Item from its current Folder to the new location.
  - As Link - This option creates a link to the Content Item in the specified location.
  - As New Copy - This option creates a new Copy of the Content Item. This new Copy has its own Content ID and exists independent of the original Content Item. It also begins in the Draft State in the Workflow.

---

Note that, if you want to create links from Content Items under one Site node in Rhythmyx to Content Items under another Site node, you must include the following columns in the Display Format: `sys_siteid` and `sys_folderid`"

---

## Locating an Item with Impact Analysis

You can determine which Folders currently contain a Content Item by specifying the Folder Content Relationship in Impact Analysis.

To view the Folder associations for a Content Item:

- 1 Log into the Content Explorer.
- 2 Locate whose locations you want to find. You can use a View, a search, or find it in a Folder if you know at least one current location.
- 3 Right click on the Item and from the popup menu choose select *Impact Analysis*.
- 4 Rhythmyx displays the Impact Analysis window for the Content Item. The default value in the **Relationship** field in Impact Analysis is *Active Assembly*.

- 5 In the **Relationship** drop list, choose *Folder Content*.

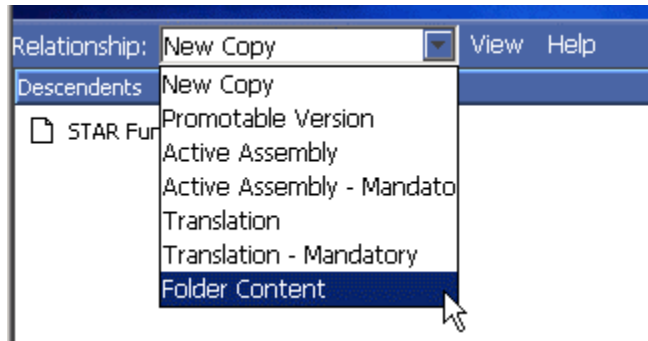


Figure 83: Viewing Folder Relationships with Impact Analysis

- 6 The Ancestors window displays all Folders containing the selected Item.

## Locating an Item within a Site Tree

Content Items can be represented by multiple Item links within a Site Tree. Though each link may represent a different page in the published output, they all represent the same Content Item. Take the example of a single Item residing in both the Investment Advice > Insurance Advice folder

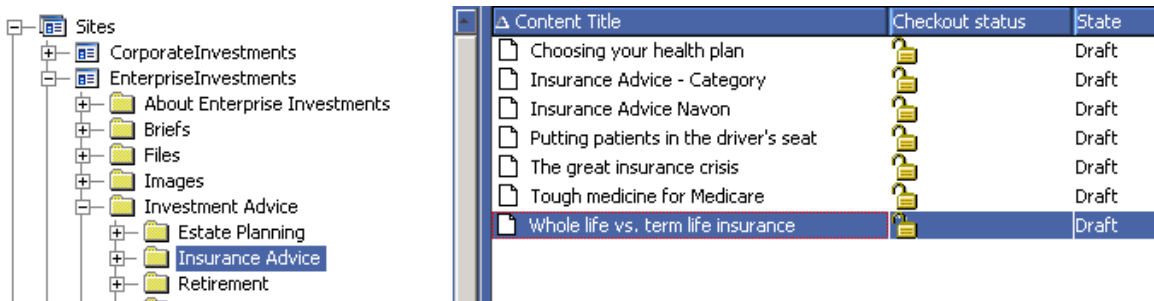


Figure 84: Press Release in the 2004 Site Folder

and the Products and Services > Insurance Products folder.

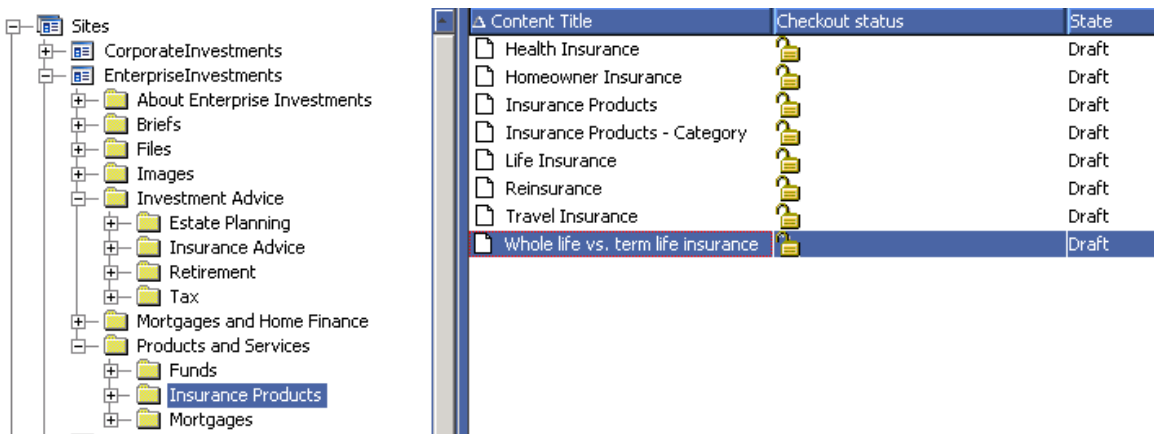


Figure 85: Press Release in Funds Site Folder

Both Folder Views target the same Content Item, but a preview of the Item in the Insurance Advice Site Folder

**Enterprise Investments** Search  GO  Region/Country

**About Enterprise Investments** **Investment Advice** **Mortgages & Home Finance** **Products & Services**

Enterprise Investments Internet > Investment Advice > Insurance Advice

**WHOLE LIFE VS. TERM LIFE INSURANCE**

I'm a 34-year-old single mother with three young children. I have about \$225,000 in term life insurance. Should I convert to whole life insurance?

-- Jane, Stoneham, Ma.

I don't see why you should. What you need at this point in your life is basic insurance protection, a policy that pays a death benefit that can provide income and assets for your children in the event you're not around to do that yourself.

And that's exactly what you get with term insurance. You pay your annual premium, and in return the insurer guarantees that it will pay your beneficiaries the face amount of the policy. All very neat and clean.

A whole life policy, on the other hand, provides a basic death benefit, but it also builds up what is referred to as "cash value," essentially a savings feature that you can withdraw or

**About Enterprise Investments**

**Investment Advice**

- Insurance Advice
- Estate Planning
- Retirement
- Tax

**Mortgages and Home Finance**

- Home Purchase
- Home Equity

**Products and Services**

- Funds
- Insurance Products

Figure 86: Insurance Page in Insurance Advice Section

yields a different Item then the one previewed in the Insurance Products Site Folder.

**Enterprise Investments** Search  GO  Region/Country

**About Enterprise Investments** **Investment Advice** **Mortgages & Home Finance** **Products & Services**

Enterprise Investments Internet > Products and Services

**WHOLE LIFE VS. TERM LIFE INSURANCE**

I'm a 34-year-old single mother with three young children. I have about \$225,000 in term life insurance. Should I convert to whole life insurance?

-- Jane, Stoneham, Ma.

I don't see why you should. What you need at this point in your life is basic insurance protection, a policy that pays a death benefit that can provide income and assets for your children in the event you're not around to do that yourself.

And that's exactly what you get with term insurance. You pay your annual premium, and in return the insurer guarantees that it will pay your beneficiaries the face amount of the policy. All very neat and clean.

A whole life policy, on the other hand, provides a basic death benefit, but it also builds up what is referred to as "cash value," essentially a savings feature that you can withdraw or

**About Enterprise Investments**

**Investment Advice**

- Insurance Advice
- Estate Planning
- Retirement
- Tax

**Mortgages and Home Finance**

- Home Purchase
- Home Equity

**Products and Services**

- Funds
- Insurance Products

Markets

Figure 87: Insurance Page in Insurance Products Section

Since these differences are significant, it is important to be able to find the correct instance of an Item when searching the system. Several methods are available to locate Content Items.

- You can manually traverse the Site Folder Tree to find each instance of a Content Item.
- You can use Impact Analysis to view the Folder Relationships of the Content Item,
- You can use the Duplicate Folder Paths View. This View returns a list of all Content Items that currently reside in more than one Site Folder.



Figure 88: Duplicate Folder Path View

## Removing a Content Item from a Site Section

Content Items that you remove from a Site Folder still exists in the system. You can thus temporarily remove a Content Item from a Web site.

Two options are available to remove a Content Item from a Site. You can either remove it from the Folder or you can move the Content Item into a new Workflow State in which it is no longer Public (Expire).

To remove a Content Item from a Folder, locate the Content Item you want to remove. Right-click on it and on the popup menu, choose *Remove from Folder*. This option only removes the Content Item from the specified Folder. If it exists in other Folders, it will still be there, and if Public, it will be published.

Users with the correct access to Content Items in the Public State can expire them, moving them out of the Public State into an Archive State. To expire a Content Item, right click on it and from the popup menu, choose *Workflow > Expire*. The Content Item will still exist in the Folder, but will be removed from the published Web site during the next publishing run.

## Splitting Navigation Sections

As you add content to your Site, you may find that some Folders contain so many Content Items that they become unwieldy. In that situation, you may want to subdivide one Folder into several Subfolders. You may also want to subdivide a Folder to accommodate marketing needs, such as spinning off a new product line, or simply to make it easier for Content Contributors to manage the content assigned to them.

When you split a Folder, you can represent it as one or more subsections in the Site:

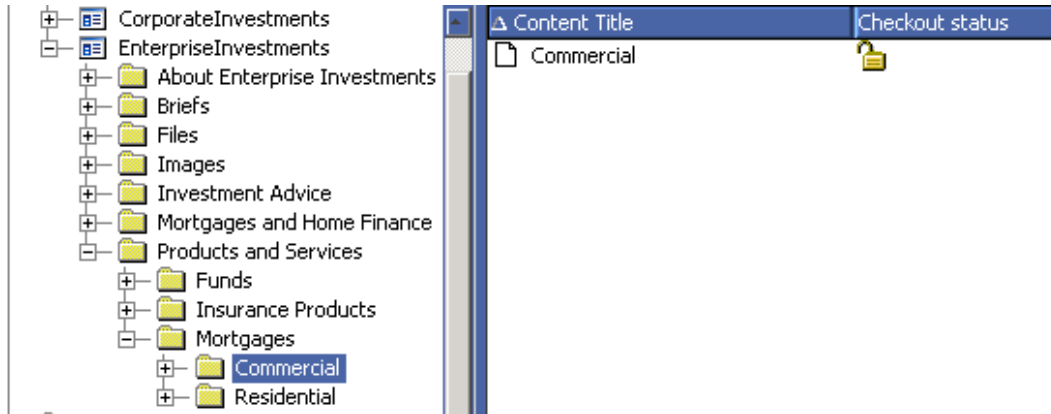


Figure 89: Splitting the Navigation Section

You can also choose to use a single Navigation Item to represent Content Items in multiple sub folders.

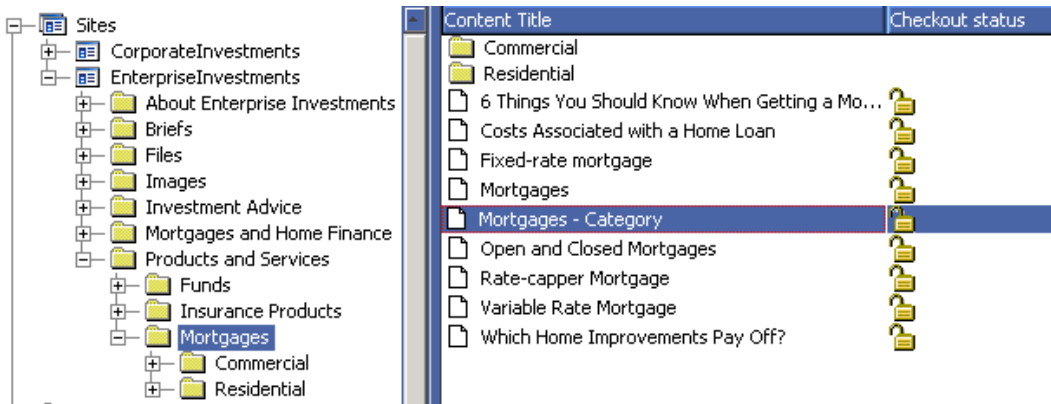


Figure 90: Representing Two Folders with One Navigation Item

Let us follow an example illustrating the first scenario. Assume we have decided to subdivide the current Mortgages section of our Web site into two new sections, Commercial Mortgages and Residential Mortgages. We will maintain the original Mortgages Site Folder and nest the two new sections within that folder.

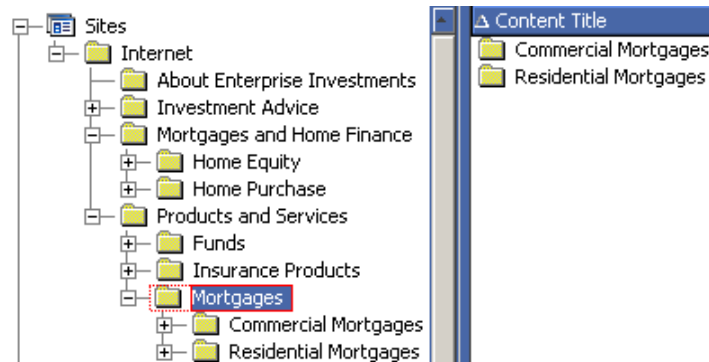


Figure 91: Site Folder without a Navon

The Mortgages Folder, though, will not itself be represented in the navigation.

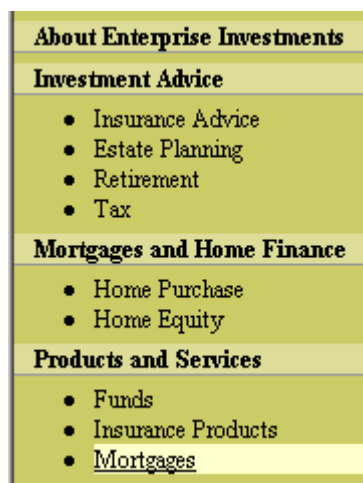


Figure 92: Navigation without Split Sections

To split a Site Folder:

- 1 Log into the Content Explorer find the Site section you want to Split (Mortgages in this case).
- 2 Create the necessary sub folders as descendants of the original Site Folder.  
In our example, we will create two new Folders, Commercial Mortgages and Residential Mortgages. Note that when we create this Folder, a Navon is added to them automatically.
- 3 Delete the Navon Item from the original Folder (from the Mortgages Folder in this case). Also delete or move any other Navigation Content Items, such as any NavImage Content Items in the Folder.
- 4 Drag and [Move] the Content Items from the Original Folder to the new descendant Folders.
- 5 Assign landing pages to the nav\_landingpage Slot of each new Navon. You may need to modify the Content Item assigned as the landing page to reflect the new contents of the Folder.



- 6 Create any new NavImage Items for the new Navons and assign them to the appropriate nav\_image Slot..

At this point, you should have the original Site Folder (Mortgages) with no currently associated Content Items. The Mortgages Folder contains two Subfolders, Commercial Mortgages and Residential Mortgages. Each of these Folders contains a single Navon and several Content Items, and possibly one or more new NavImage Content Items.

We want the navigation to skip the Mortgages Folder. We will have to add the new Navons to the nav\_submenu of Navon in the Folder that contains the Mortgages Folder (which is Products and Services in our example).

- 7 Open the Products and Services Folder and locate its Navon.
- 8 Right-click on the Navon and from the popup menu choose *Active Assembly Table Editor*. Rhythmyx displays the Active Assembly Table Editor.
- 9 Click the nav\_submenu link and search for Content Items with the word "mortgages" in the title.
- 10 Check the boxes for the Commercial Mortgages and Residential Mortgages Navons, then click the [Link to Slot] button.

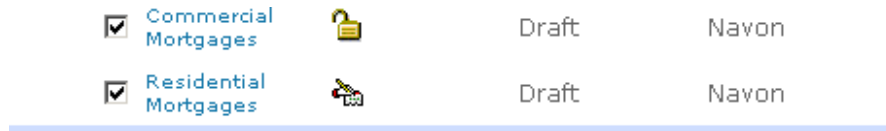


Figure 93: Adding Navon Items to the nav\_submenu Slot

- 11 Close the Active Assembly Table Editor.
- 12 Transition the new Navons the Public State.
- 13 Reset the navigation.
- 14 Preview the landing pages in each new descendant section. The navigation should not show the old Mortgages Section, but instead display each of the new descendant sections.

<b>About Enterprise Investments</b>
<b>Investment Advice</b>
<ul style="list-style-type: none"> <li>• Insurance Advice</li> <li>• Estate Planning</li> <li>• Retirement</li> <li>• Tax</li> </ul>
<b>Mortgages and Home Finance</b>
<ul style="list-style-type: none"> <li>• Home Purchase</li> <li>• Home Equity</li> </ul>
<b>Products and Services</b>
<ul style="list-style-type: none"> <li>• Funds</li> <li>• Insurance Products</li> <li>• Commercial Mortgages</li> <li>• Residential Mortgages</li> </ul>

Figure 94: Navigation with New Split Sections

## Merging Navigation Items

It is no less common to merge sections of a Web site than to split them. When you merge several Folders, you also need to merge their Navigation Content Items as well. For example, originally, we organized Press Releases by year:

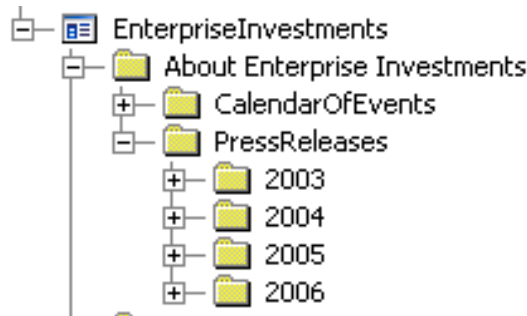


Figure 95: Press Releases by Year

After gathering five years worth of Items, we decided that any Press Release two years or older would be managed in an Archives Site Folder.

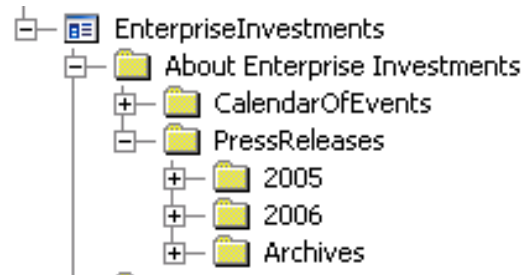


Figure 96: Press Releases by Year with Archive Folder

These Items would be represented by a single Navigation Item and sorted with an Auto Index by creation date. So we need to merge the originally separate yearly press releases Folders into the Archives Folder.

To merge Folders and navigation:

- 1 Log into the Content Explorer.
- 2 Create a new Folder to merge the existing Folders. In our example, we will create an Archives Folder. When we create the new Folder, a new Navon is created automatically. If desired, you can also create and associate a NavImage Content Item as well.
- 3 Move the necessary Content Items from the old Site Sections to the newly created Site Folder by selecting them, dragging them into the new Site Folder and choosing *Move* from the popup menu.
- 4 Specify a Landing page for the new Navon.
- 5 Delete the now stale Navigation Items from the old Site Folders.
- 6 Delete the now empty Site Folders.
- 7 Reset the Navigation.

## Reordering a Submenu

By default, when a Navon or NavTree Item is created, the `nav_submenu` slot is populated with links to the Navon Items in the directories immediately below the current one. These Relationships build a list of links to the Subfolders contained in a Folder. In the published output, when you choose certain navigation links (such as the left navigation), it expands to show links to the subsections. This list of sub menu Items is assembled in the order that the Folders appear in the Navigation pane of Content Explorer. However, you may want to modify this order.

To reorder a submenu:

- 1 Locate the Navon whose submenu you want to reorder.
- 2 Right-click on the Navon and from the popup menu choose *Active Assembly Table Editor*.  
Rhythmyx displays the Active Assembly Table Editor.
- 3 Use the up and down arrow icons to the right of the Navon Items displayed in the `nav_submenu` Slot to adjust the order of the Navons.

Slot(ID): <code>nav_submenu( 319)</code>			
Item Title(ID)	Item Type(ID)	Item Variant(ID)	Action
2004( 329)	Navon( 314)	navlink( 338)	
2003( 330)	Navon( 314)	navlink( 338)	
2005( 372)	Navon( 314)	navlink( 338)	
2006 Navon( 375)	Navon( 314)	navlink( 338)	

Figure 97: Reordering Navons in the `nav_submenu` Slot

- 4 Close the Active Assembly Table Editor.



---

## Customizing Navigation Look and Feel

The look and feel of page navigation can be affected in two specific ways:

- Creation of a new Navigation Template;
- Manipulation of Navigation by CSS.

Both of these approaches also include their own avenue for selection during the generation of the Navigation. Themes allow the Web Administrator to have several entirely different Navigation template used for a single menu depending on its location within a Site (The Funds section can use the template defined by Theme A while the Mortgage section uses Theme B). This pick and choose approach can also be applied to the design of multiple CSS using Variable Selectors (The Funds section can use the CSS defined by Variable Selector A while the Mortgage section uses Variable Selector B). Additionally, these two approaches can be used in conjunction with one another to yield a myriad of output Navigation menus.

### Customizing Navigation CSS

All installations will need to adapt the look and feel of the navigation to conform to the overall site design. The default navigation templates rely heavily on CSS for look and feel. FastForward ships with a CSS file named, `rxs_styles.css`. This CSS file contains sections for each of the navigation bars that ship with the system including `nav_left`, `nav_top`, and the like. This file is located in the `\web_resources\rxs_nav\css` directory.

These sections can be easily modified to produce the correct fonts, colors and indents.

The `nav_left` Slot that will ultimately hold the `nav_left` Snippet is wrapped with a `<td>` or similar container tag with the `left_nav` attribute defined.

```
<td id="left_nav">
  <!-- start slot nav_left -->
  <!-- start snippet wrapper -->
  <span slotname="nav_left" psxeditslot="no"/>
  <!-- end snippet wrapper -->
  <!-- end slot nav_left -->
</td>
```

A sample from the `nav_left.xml` template builds the contextual reference for the individual Item.

```
<xsl:template match="navon[@relation='self']" priority="5"
mode="sectionImage">
  <!-- processes the image at the top of the Nav -->
  <xsl:apply-templates select="document(image-list/image-
link[@selector='section'])" mode="down"/>
</xsl:template>
<xsl:template match="navimageinfo" mode="down">
  <!-- processes the image at the top of the Nav -->
  <xsl:variable name="img_name" select="concat('img_',@contentid)"/>
  <img alt="{displaytitle}" class="sectionImage">
    <xsl:attribute name="src"><xsl:value-of
select="activeimage"/></xsl:attribute>
    <xsl:attribute name="id"><xsl:value-of
select="$img_name"/></xsl:attribute>
```

```

    </img>
  </xsl:template>

```

The resulting HTML file this template renders contains the appropriate relationship between the current Item and nearby Items:

```

...
  <navon absolute-level="1" name="About Corporate Investments Navon"
  relation="self" relative-level="0" sys_contentid="329" sys_revision="1">
    <label>About Corporate Investments</label>
    <landing-page
  psessionid="5deaed6a4d87d443dc8c148d3cc4e28ef18fe7a5" sys_authtype="0"
  sys_contentid="335" sys_context="0" sys_revision="1" sys_siteid="301"
  sys_variantid="313">http://127.0.0.1:9999/Rhythmyx/rxs_Shared_cas/s_shar
  ed.html?shared_variantid=4&sys_revision=1&sys_siteid=301&sys
  _authtype=0&sys_contentid=335&sys_variantid=313&psessionid=
  5deaed6a4d87d443dc8c148d3cc4e28ef18fe7a5&sys_context=0</landing-
  page>
      <info-link sys_contentid="329" sys_revision="1"
  sys_variantid="347">http://127.0.0.1:9999/Rhythmyx/rxs_Navon_cas/navon.x
  ml?sys_revision=1&sys_siteid=301&sys_authtype=0&sys_contenti
  d=329&sys_variantid=347&psessionid=5deaed6a4d87d443dc8c148d3cc4
  e28ef18fe7a5&sys_context=0</info-link>
      <image-list>
        <image-link sys_contentid="469" sys_revision="1"
  sys_variantid="346">http://127.0.0.1:9999/Rhythmyx/rxs_NavImage_cas/NavI
  mageInfo.xml?sys_revision=1&sys_siteid=301&sys_authtype=0&sys
  s_contentid=469&sys_variantid=346&psessionid=5deaed6a4d87d443dc
  8c148d3cc4e28ef18fe7a5&sys_context=0</image-link>
        <image-link selector="section" sys_contentid="482"
  sys_revision="1"
  sys_variantid="346">http://127.0.0.1:9999/Rhythmyx/rxs_NavImage_cas/NavI
  mageInfo.xml?sys_revision=1&sys_siteid=301&sys_authtype=0&sys
  s_contentid=482&sys_variantid=346&psessionid=5deaed6a4d87d443dc
  8c148d3cc4e28ef18fe7a5&sys_context=0</image-link>
      </image-list>
      <navon absolute-level="2" name="2004" relation="descendent"
  relative-level="1" sys_contentid="498" sys_revision="1">
        <label>2004</label>
        <landing-page
  psessionid="5deaed6a4d87d443dc8c148d3cc4e28ef18fe7a5" sys_authtype="0"
  sys_contentid="502" sys_context="0" sys_revision="1" sys_siteid="301"
  sys_variantid="313">http://127.0.0.1:9999/Rhythmyx/rxs_Shared_cas/s_shar
  ed.html?shared_variantid=4&sys_revision=1&sys_siteid=301&sys
  _authtype=0&sys_contentid=502&sys_variantid=313&psessionid=
  5deaed6a4d87d443dc8c148d3cc4e28ef18fe7a5&sys_context=0</landing-
  page>
          <info-link sys_contentid="498" sys_revision="1"
  sys_variantid="347">http://127.0.0.1:9999/Rhythmyx/rxs_Navon_cas/navon.x
  ml?sys_revision=1&sys_siteid=301&sys_authtype=0&sys_contenti
  d=498&sys_variantid=347&psessionid=5deaed6a4d87d443dc8c148d3cc4
  e28ef18fe7a5&sys_context=0</info-link>
        </navon>
...

```

Of course, the implementer is free to create an entirely different convention for the CSS, as long as all page variants conform to the convention. As such, simple changes to the cascading style sheet allow for a great deal of control over the look and feel of the navigation in all its forms.

The class values defined in the previous code segment correspond to style classes found in the `rxs_styles.css` document.

```
#left_nav {
  top:0; left:0; width:180px;
  background:#cc6;}

#left_nav h3 {
  width:100%;
  display:block;
  padding:0;
  font-size:12px; font-weight:bold;
  line-height:15px; margin:0; margin-top:5px;}

#left_nav h3 a {
  width:100%;
  display:block;
  padding-left:10px;
  color:#000; background-color:#dd9; text-decoration:none;
  border-bottom:1px solid #999;}

#left_nav h3 a:hover {
  width:100%;
  display:block;
  color:#ffc;
  background-color:#320;}

#left_nav ul {
  width:100%; display:block;
  padding-left:24px; margin:4px 0;
  font-size:12px;}

#left_nav li { width:100%;}

#left_nav li a:link, #left_nav li a:visited {
  width:100%; display:block;
  text-decoration:none;
  color:#000;}

#left_nav li a:hover {
  text-decoration:underline;
  color:#000; background-color:#ffc;}
```

## Using Variable Selectors

Context Variables are defined and applied to HTML templates to allow different values to be populated into a page depending on Context (preview, publish, etc.). These values are generally used to define the location of static, non-managed design resources such as CSS and images.

Variable Selectors allow Web Masters a greater amount of flexibility when working with Context Variables within a Site. Once the necessary Context Variables are defined, the Web Master has the ability to:

- Define a single variable to be used throughout an entire Site;
- Define different Variables to different Site Sections.

As an example, our Corporate Investments Internet Site can be using a single set of static images and CSS for all Site Sections except for the Products and Services section (and all sub-sections below it). This may be necessary as this section is maintained by a completely different Web Master than the other sections.

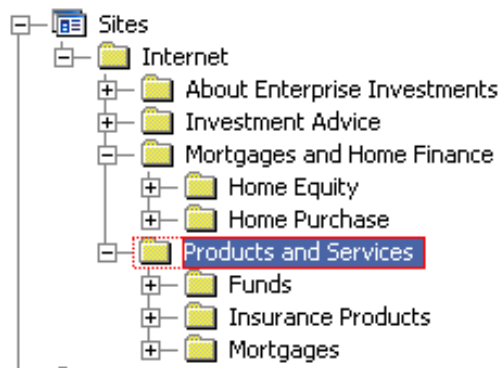


Figure 98: Products and Services Site Sub Section

By selecting a different Variable Selector for the Navon in the Products and Services section,

<b>* System Title:</b>	<input type="text" value="Products and Services"/>
<b>* Title:</b>	<input type="text" value="Products and Services"/>
<b>* Start Date:</b>	<input type="text" value="2004-08-18 00:00:00.0"/>
<b>Image Selector</b>	<input type="text" value="None"/>
<b>Variable Selector</b>	<input type="text" value="ProductServices"/>
	<input type="button" value="Update"/> <input type="button" value="Close"/>

Figure 99: Defining an Alternate Variable for a Site Section

the Preview and Published Site can use the same Content Type but use a different CSS, Javascript, and set of design images and thus take on a completely different look and feel.



Note: The Variable `rxs_navbase` needs to be a registered Context Variable (even if it is never used). The value associated with `rxs_navbase` needs to be generic enough to be used whenever a Variable Selector is not defined in a Site. Our example will assume that the Products and Services section will have its own set of design images and CSS. The Javascript file used will be the same one used in all other pages.

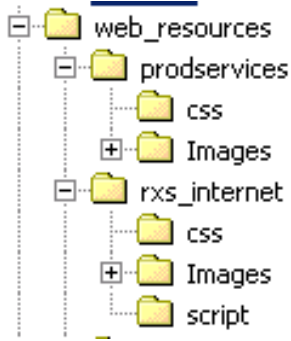


Figure 100: Multiple Locations for Design Elements

## Procedure

- 1 Confirm the existence of a default `rxs_navbase` Context Variable in the Publishing tab.

Note: The variable name, `rxs_navbase` can be changed if necessary. The new variable name must be replace the existing `navtree.variable` value in the `navigation.properties` file in the `Rhythmyx/rxconfig/server` directory. Once changes are made to this file, the Rhythmyx server must be restarted.

```

navon.variant.info=navinfoLink
navon.variant.navlink=navlink
navon.variant.tree=navontree
navtree.content_type=navtree
navtree.field.theme=nt_theme
navtree.theme.default=DefaultTheme
navtree.variable=rxs_navbase
navtree.variant.info=navtreeinfoLink
navtree.param.theme=nav_theme
  
```

Figure 101: Variable Selector Value as Defined in `navigation.properties`

- 2 Confirm the use of `rxs_navbase` for all Context Variables except `src` for `<script>` tags in the HTML templates for all Variants being used in the Products and Services Site Section.

```

<td align="left" valign="top" width="10">
  
</td>
  
```

Figure 102: Context Variables Used in an HTML Template

- 3 Use the Context Variable `rxs_js` for the `src` attributes in any `<script>` tags in the HTML template. Save and close the HTML templates. Replace existing split templates as necessary.
- 4 Confirm the existence of, or create as necessary, the new design elements (CSS and Images) and build the site structure to conform to the registered folder directories. A page cannot use a CSS file that doesn't exist...


- 5 Register new Context Variables pointing to the new design elements in the prodservices subdirectories. Be sure to provide a value for all necessary contexts (preview and publish).

---

Note: This Variable needs to be generic enough to use across CSS and Images. A value like `../web_resources/internet` is more flexible than `../web_resources/css`. Using the former will allow for the reuse of variables across multiple html tags. Remember, a single value is being used for elements in both a css and Images directory.

---

For our Products and Services example, lets use the variable ProductServices and register a preview and publish value for our Internet Site

ProductServices			Add Value
Value	Site(id)	Context(id)	
 <code>../web_resources/prodservices</code>	Internet(301)	Preview(0)	
 <code>/web_resources/prodservices</code>	Internet(301)	Publish(1)	

*Figure 103: Context Variables for the Products and Services Site Section*

- 6 Navigate to the Content Explorer and locate the Products and Services Site Section in the Internet Site. In this section, select and [Edit] the Section's Navon.
- 7 Assign the new Variable ProductServices as the value associated with the Navon's Variable Selector field.
- 8 [Update] and [Close] the Item to save changes.
- 9 Reset the navigation and preview an Item in the Products and Section. These pages should now take on the look and feel associated with the prodservices design elements. The same templates are simply using different CSS and design images.

## Creating Custom Navigation Variants

Navigation Variants use the XML generated by each navigation application. These Variants are responsible for identifying where in the navigation tree the current Item is located, and as a result how to represent the menu for the Item in relationship to nearby Items in the tree.

Note: It is important to note that even though it may be tempting, it is not recommended to add the `sys_addAssemblerInfo` Exit to the `navon` or `navtree` XML resources.

### Navigation Schema

Though it is really a combination of several documents, we will always represent the navigation tree as a single XML document. This document consists of a single `<navtree>` root element and a series of `<navon>` elements.

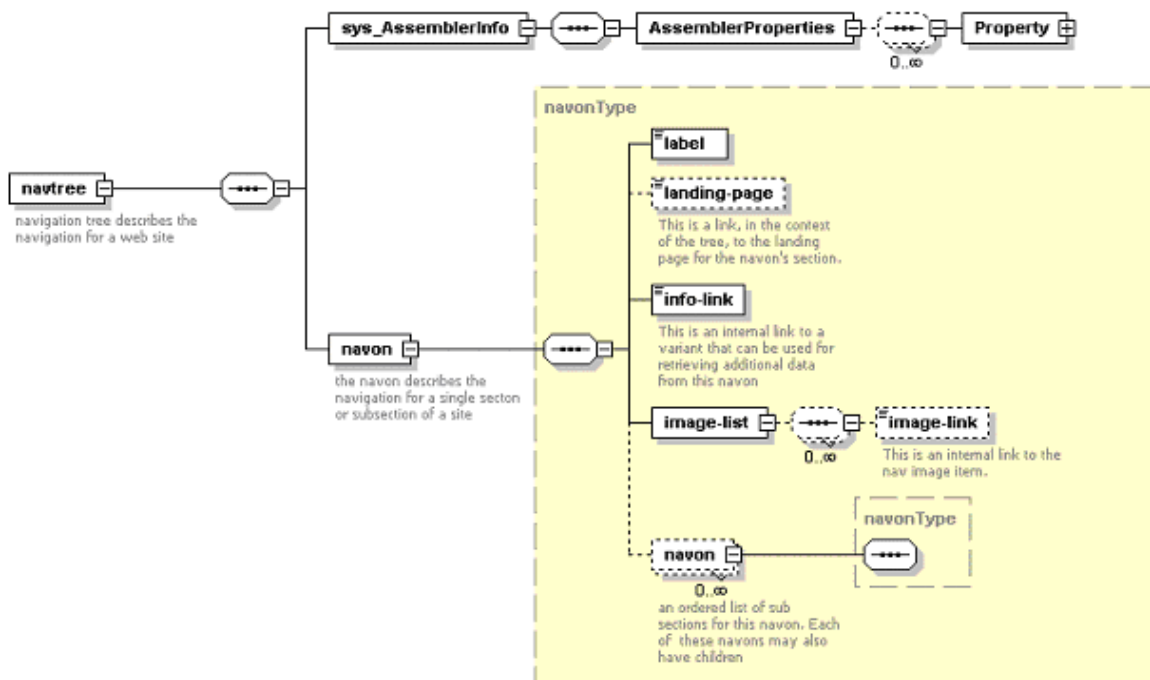


Figure 104: NavTree Schema

The NavTree element has attributes for all of the standard Rhythmyx HTML parameters: `sys_contentid`, `sys_revision`, `sys_context`, `sys_authtype`, etc.

There is also a set of “Assembler Properties”. These properties are in the same format as those added by the `sys_casAddAssemblerInfo` Exit used on all normal Content Assemblers. These properties are used to implement `$Context` variables.

The Navon element has 4 major sub-elements.

- The Label is used when rendering navigation Variants. The Label becomes the “clickable” text.

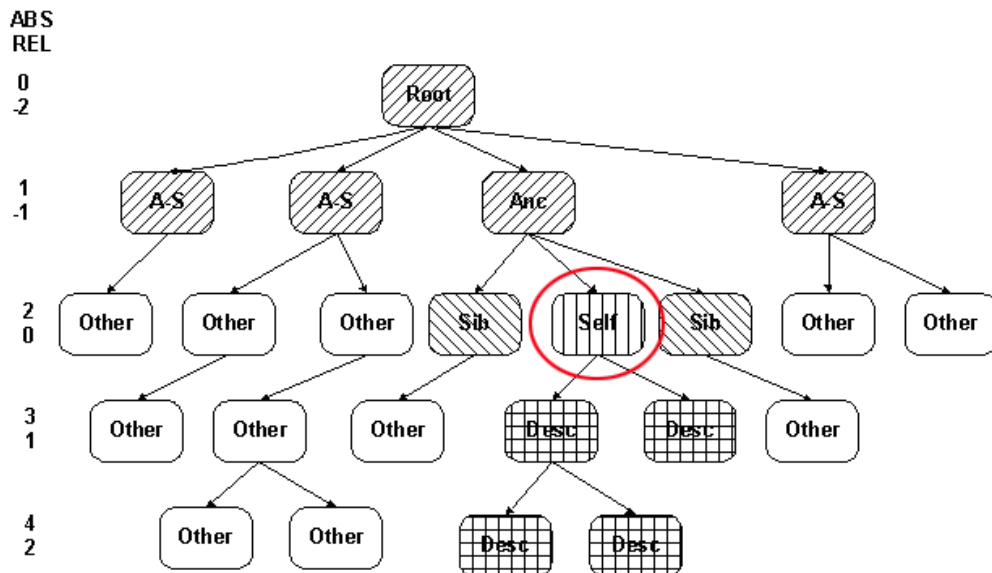
- The Landing Page is a link to the first content item in the Landing Page slot. It is rendered in the context specified by sys\_context. The URI of this link is determined by the “href” attribute of the first <a> tag in the attached snippet. In other words, this link points to the Page variant of the landing page that is specified in the snippet that is included in the slot. For External items, the snippet should point directly at the external URL.
- The Info-Link is used for extended variants of the Navon. It is a pointer to a pre-defined XML variant that implementers can add extra fields and information to. This will be used for JavaScript information in the base implementation. Because this variant is intended for use in XSL stylesheets, the link is always an Internal link.
- The Image Link is used to render the menu images. It links to a specific XML variant contained within the Nav Image slot. Again, this link is always rendered as an Internal link for use in XSL stylesheets

Each Navon may also have any number of child Navons, which form the tree.

Every node is categorized by its relationship to the node where the assembly starts. These categorizations are:

- Root
- Ancestor
- Ancestor-Sibling
- Sibling
- Self
- Descendent
- Other

When diagrammed, these categorizations take on a meaningful context.



The node where the assembly of the Item starts is the SELF node. All direct parents are ANCESTOR nodes. SIBLING and ANCESTOR-SIBLING nodes are the immediate relatives of the SELF and ANCESTOR nodes. The top node is always the ROOT. DESCENDENT nodes are all nodes underneath the SELF node. Typically, these are the nodes that render in a navigation bar. All OTHER nodes (more distant relations) are not typically used.

There is one special case worth mentioning. In the case where the SELF node is the same as the ROOT node (as in a Site Map variant, for example), here, there are only two categories used: SELF and DESCENDENT.

The Relative and Absolute levels are shown at the left of the diagram. The Absolute level starts at the ROOT (0) and increases as the tree grows downward. The Relative level starts at the SELF node. These levels are intended to be used by rendering style sheets to limit the number of levels displayed, and to control the styles used to render each part of the navigation bars.

Depending on the desired navigation menu, the developer can have each node represented in a unique manner. The node can be expanded, hidden, placed as a descendant of another node, etc. A copy of the navigation schema can be found in the appendix.

## Navigation Variant XSL

Without being a lesson on XSLT, the intent of this section is to describe a generic template and its intended function. The style sheet `nav_left.xsl` is used by the `rxs_navon_cas` application. This style sheet is used to parse the navigation XML and render the left navigation. This style sheet can be broken down into several small sections. The first of the sections imports the `nav_commons.xsl` style sheet. In addition, a standard `xsl:output` statement is defined.

**Template** - `xsl:template match="/"`

**Result** - This first template builds the frame of the HTML document including the `<head>` and `<body>`. This template finds a particular node of the XML and begins processing.

```
<html>
  <head>
    <title>nav left snippet</title>
    <link rel="stylesheet" type="text/css"
          href="../../web_resources/rxs_nav/css/rxs_nav.css"/>
  </head>
  <body>
    <table width="100%" border="0" cellpadding="0"
          cellspacing="0" class="rxs_navleft">
      <xsl:apply-templates
        select="/navtree/navon[@relation='root'
          or @relation='self']"/>
    </table>
  </body>
</html>
```

**Template** - `xsl:template match="navon[@relation='root']"`

**Result** - If the node being processed in the root, this template does nothing. We will not be displaying the root node in this navigation menu.

```
<xsl:apply-templates select="navon"/>
```

**Template** - `xsl:template match="navon[@relation='ancestor']"`

**Result** - If the node being processed is an ancestor, we will display the landing link indented with a bullet in front of it.

```
<xsl:variable name="indentclass" select="concat('navlevel',
  @absolute-level)"/>
<tr>
  <td class="{ $indentclass}"
    onmouseout="className='{ $indentclass}' "
    onmouseover="className='{ $indentclass}-on' ">
    <div class="open">
      <xsl:if test="@absolute-level='2'">&#xB7;&#160;</xsl:if>
      <xsl:call-template name="landinglink"/>
    </div>
  </td>
</tr>
<xsl:apply-templates select="navon"/>
```

The landinglink template is contained in the imported file, nav\_commons.xsl.

**Template** - `xsl:template match="navon[ @relation='sibling' or @relation='ancestor-sibling' or (@relation='descendent' and @relative-level='1') or (@relation='other' and @absolute-level='2') or (@relation='descendent' and @absolute-level='2') ]"`

**Result** - This template matches on siblings, ancestor-siblings, descendants with a relative level equal to 1, others with an absolute level of 2, or descendants with an absolute level of 2. The processing on these nodes includes the display of the landinglink with their appropriate class values

```
<tr>
  <td class="{ $indentclass}"
    onmouseout="className='{ $indentclass}' "
    onmouseover="className='{ $indentclass}-on' ">
    <div class="closed">
      <xsl:if test="@absolute-level='2'">&#xB7;&#160;</xsl:if>
      <xsl:call-template name="landinglink"/>
    </div>
  </td>
</tr>
<xsl:apply-templates select="navon"/>
```

**Template** - `xsl:template match="navon[@relation='self']"`

**Result** - The last template match is if the node being processed is itself (self). If this is true, the landing link is generated and a bullet is place to the left of the indented text.

```
<tr>
  <td class="{ $indentclass}"
    onmouseout="className='{ $indentclass}' "
    onmouseover="className='{ $indentclass}-on' ">
    <div class="self">
      <xsl:if test="@absolute-level='2'">&#xB7;&#160;</xsl:if>
      <xsl:call-template name="landinglink"/>
    </div>
  </td>
</tr>
</xsl:if>
<xsl:apply-templates select="navon"/>
```

All remaining nodes are left unprocessed. The basic concept is that the current node location is identified and processed according to the rules of the template and the matching CSS. Manipulating the output of each template and the CSS allows the developer to customize the navigation as needed.

Once the custom navigation Variant is written, it is added to the rxn\_navon\_cas assembly application on the navtree resource

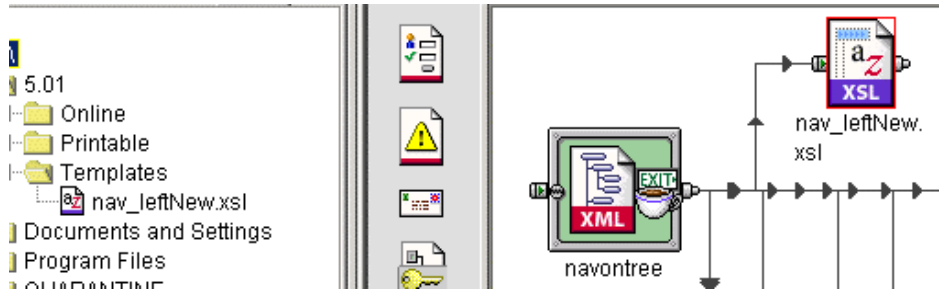


Figure 105: Adding a New Variant to navtree

and the new Variant is registered in the System Administrator like any other Snippet Variant.

*Name	nav_leftNew
Description	left expandable navigation bar
Style Sheet	nav_leftNew.xsl
*URL	../rxn_Navon_cas/navontree.html
Location Prefix	
Output Form	<input checked="" type="radio"/> Snippet <input type="radio"/> Page
Active Assembly Format	Non-HTML
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
<b>Slots</b>	
	Slot Type(id)

Figure 106: Registering nav\_LeftNew for Navon

In addition, it is necessary to assign the template its Variant ID and its associated Theme. If Themes are not being used, simply select when the Theme is NOT equal to multi.

Variable	Op	Value	bool
PSXSingleHtmlParameter/sys_variantid	=	360	AND
PSXSingleHtmlParameter/nav_theme	!=	multi	

Figure 107: Adding Page Selection Conditions to nav\_leftNew.xsl

More information on Themes can be found in the topic Navigation Themes. Save and close the application. Previewing the Variant on any given Item should result in the desired navigation.

---

Note: At times, when creating new navigation variants it is tempting to add the addAssemblerInfo Exit to the navontree XML. This is not desirable as the Exit used to build the navon XML generates its own partial assembler info XML. Adding this Exit will cause undesired results.

---

At this point, this new navigation Snippet should be associated with the global template (or Variant responsible for rendering the navigation). See the topic titled, "Associating a custom navigation variant to a template" for details. Use the sample templates in the Rhythmyx/rxs\_Navon\_cas directory for assistance when developing new templates.

## Adding Navigation Elements to Page Variants

For navigation to render on a Page, the Slot containing the navigation as allowed content must be defined in the Page template.

- 1 Open the Page template where the navigation Snippet will reside.
- 2 Locate the section of the template where the navigation will be rendered. The navigation Snippet is returned as a table. As such, the location of this Slot should be layed out accordingly.

```
<div id="bigDiv">
  <div id="leftDIV">
    <div id="leftcontent">
      <div id="miscellaneous_paddeddiv" class="rxs_nav">
        Left Nav slot will go here
        <TABLE cellSpacing="0" cellPadding="0" width="145" bgColor="#848ba9">
          <TBODY>
            <TR>
              <TD vAlign="center" align="middle" width="145" height="2">
                <IMG height="20" alt="Account Login" src=
                  "images/AccountLogin.gif" psx-src="$rxs_img/AccountL
                    width="145" />
```

Figure 108: Left Navigation Slot Location in Page Template

- 3 Add the standard Slot markup to the Page template. Notice the Slot name used is the Slot created specifically to hold the new navigation Snippet. This Slot is set to not allow edits by Content Contributors as it will be automatically populated by the navigation Snippet.

```
<div id="bigDiv">
  <div id="leftDIV">
    <div id="leftcontent">
      <div id="miscellaneous_paddeddiv" class="rxs_nav">
        <!-- start slot -->
        <span slotname="nav leftNew" psxeditslot="no">left nav here</span>
        <!-- end slot -->
        <br />
        <br />
        <TABLE cellSpacing="0" cellPadding="0" width="145" bgColor="#848ba9" border="
          <TBODY>
            <TR>
              <TD vAlign="center" align="middle" width="145" height="20">
                <IMG height="20" alt="Account Login" src=
                  "images/AccountLogin.gif" psx-src="$rxs_img/AccountLogin.gif"
                    width="145" />
              </TD>
```

Figure 109: Left Navigation Slot with markup

---

Note the addition of the class, "rxs\_nav." This class is defined around the navigation and provides standard look and feel. This <div> class should be replaced as necessary.

---

- 4 Save and re-split the Page according to the instructions provided in, "Creating a Global Template."

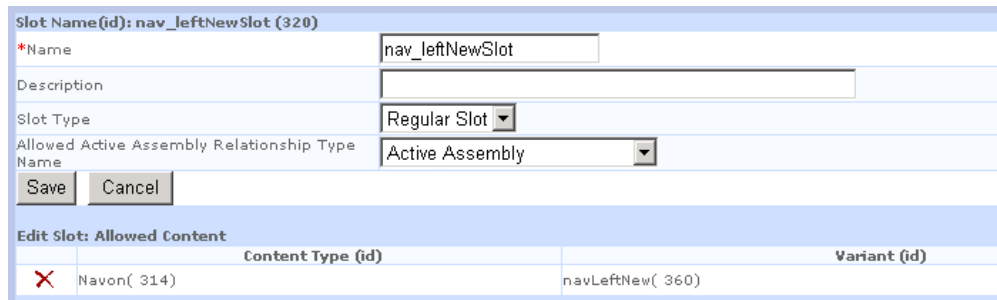


## Registering a new Navigation Menu Slot

Once a new Navigation Variant is created and registered it must either replace an existing Snippet as allowed content in an existing Slot or a new Slot must be created, the new Variant assigned to it, and the Slot Template added to the Page Variant using it.

### Procedure

- 1 Log into the System Administrator.
- 2 Select Slots [By Name] in the left panel.
- 3 Select [Add New Slot].
- 4 Register a new Regular Active Assembly Slot.



Edit Slot: Allowed Content	
Content Type (id)	Variant (id)
✗ Navon( 314)	navLeftNew( 360)

Figure 110: Assigning Allowed Content to a Slot

- 5 Add the new navigation Variant to the Slot as Allowed Content.
- 6 Save the new Slot registration.
- 7 On the Rhythmyx Server's file system, navigate to the <Rx Root>/rxconfig/Server directory and open the Navigation.properties file.
- 8 Locate the navon.slotnames attribute.
- 9 Add the name of the newly registered Slot to this list. Save and close the file.

---

Note: The Rhythmyx server must be restarted to pickup the changes to Navigation.properties. The addition of the Slot name to this attribute provides the rxs\_NavAutoSlot Exit with a list of Slots to populate with <info-link> elements. This is accomplished by comparing the list of allowed Slots on a Variant to the navon.slotnames attribute. The intersection of these two lists is acted upon by the Exit.

---

At this point the nav\_leftNewSlot can be added to a Page Variant. See the topic, "Adding Navigation Elements to Page Variants."

## Using Navigation Themes

In larger, more complex installations, the preferred approach to controlling look and feel within navigation menus is to add a Theme. This allows the developer to create additional XSL style sheets without having to register new Variants or Slots. Using a Theme is less labor intensive than registering an entirely new Variant.

Themes are selected in the NavTree item at the root of the tree. The Theme name is available as an HTML Parameter named “nav\_theme”, and also as an attribute of the tree root.



Figure 111: Selecting a Theme

The Themes are defined Key words with corresponding values.

Keyword ID	321	Look Keyword	
*Keyword Name	Nav Theme		
Description	Selects which stylesheet will be used to render		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			
Choice List			
Choice Label	Description	Choice Value	Sort Order
<input type="checkbox"/> Multi - Color Theme	Navigation Theme for multicolor site	multi	20
<input type="checkbox"/> Single Color Theme	Navigation theme for single color site	single	10

Figure 112: Theme Keywords

The HTML parameter is then used when selecting style sheets in the workbench. This particular resource has two stylesheets, nav\_left and nav\_left.

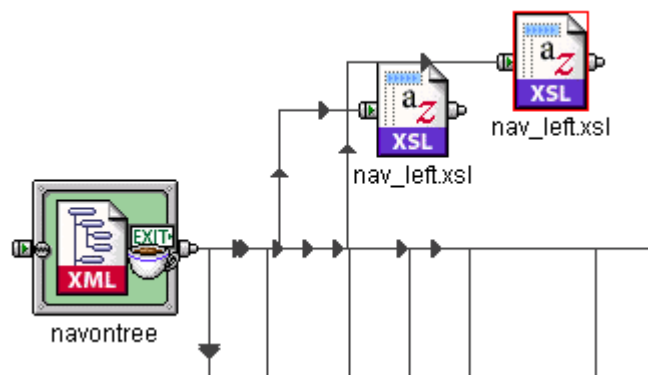
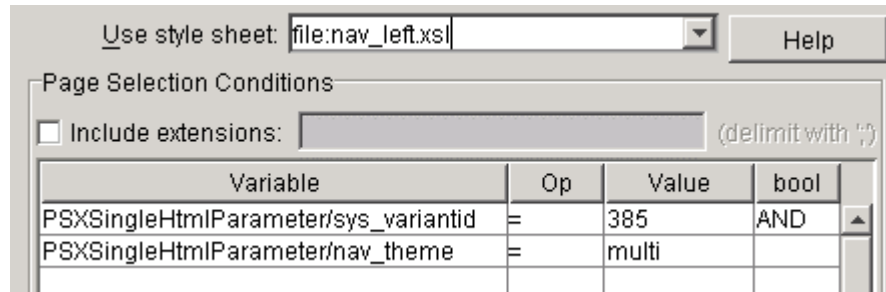


Figure 113: navontree with Two nav\_left Style Sheets

The style sheets are differentiated by their page selection conditions.



Use style sheet: file:nav\_left.xsl Help

Page Selection Conditions

Include extensions: (delimit with ";")

Variable	Op	Value	bool
PSXSingleHtmlParameter/sys_variantid	=	385	AND
PSXSingleHtmlParameter/nav_theme	=	multi	

Figure 114: Page Selection Conditions for one Style Sheet

This allows for a single registration of the nav\_left Variant, and multiple output styles based on a selection at the root of a Site. For those writing Variant templates, the attribute is useful within an XSL stylesheet, where it can be referenced as: `/*/@theme`



## CHAPTER 5

# Adding Roles to Your System

A Role is a collection of users with the same access in Rhythmyx. Organizing users into Roles helps administrators manage users that have the same permissions. Instead of managing the permissions for each user, they define a Role and its permissions, then assign users to it. Users inherit their access rights from the Roles to which they are currently assigned.

You can also assign attributes to each Role. Users inherit the attributes of the Role. In addition, you can define attributes for specific users in each Role. The users assigned to a Role are known as the Members of the Role.

Rhythmyx uses Roles in both Communities and in Workflow. In both cases, the Roles are defined on the Rhythmyx server. Roles are used in slightly different ways by Communities and Workflows, however, and user must be a member of both a Community Role and a functional Role (in other words, a Workflow Role) to ensure that they have complete access to Rhythmyx.

---

## Creating the XI\_Members Role

To demonstrate the creation of Roles, we will create the Role for the Express Investments Community. We will name the Role XI\_Members. Roles defined for Communities are generally defined with the property `sys_defaultCommunity`.

To create the XI\_Members Role:

- 1 Start the Rhythmyx Server Administrator.
  - a) Click the Windows [**Start**] button, and choose *Programs > Percussion Rhythmyx > Rhythmyx Server Administrator*.

Rhythmyx displays the Server Administrator Login dialog.
  - b) The value in the **Server** field defaults to *localhost*. If your Rhythmyx server runs on a Unix or Linux machine, you will need to enter the name or IP address of that machine.
  - c) The value in the **Port** field defaults to *9992*. If you specified a different port for your Rhythmyx server, change the value of this field to match your Rhythmyx server port. (If you are using the Full-text Search Engine, this value should NOT be the default port, *9992*.)
  - d) In the **User name** field, enter *admin1*.
  - e) In the **Password** field, enter *demo*.
  - f) Click the [**Login**] button.

g) Rhythmix logs you in and displays the Server Administrator dialog.

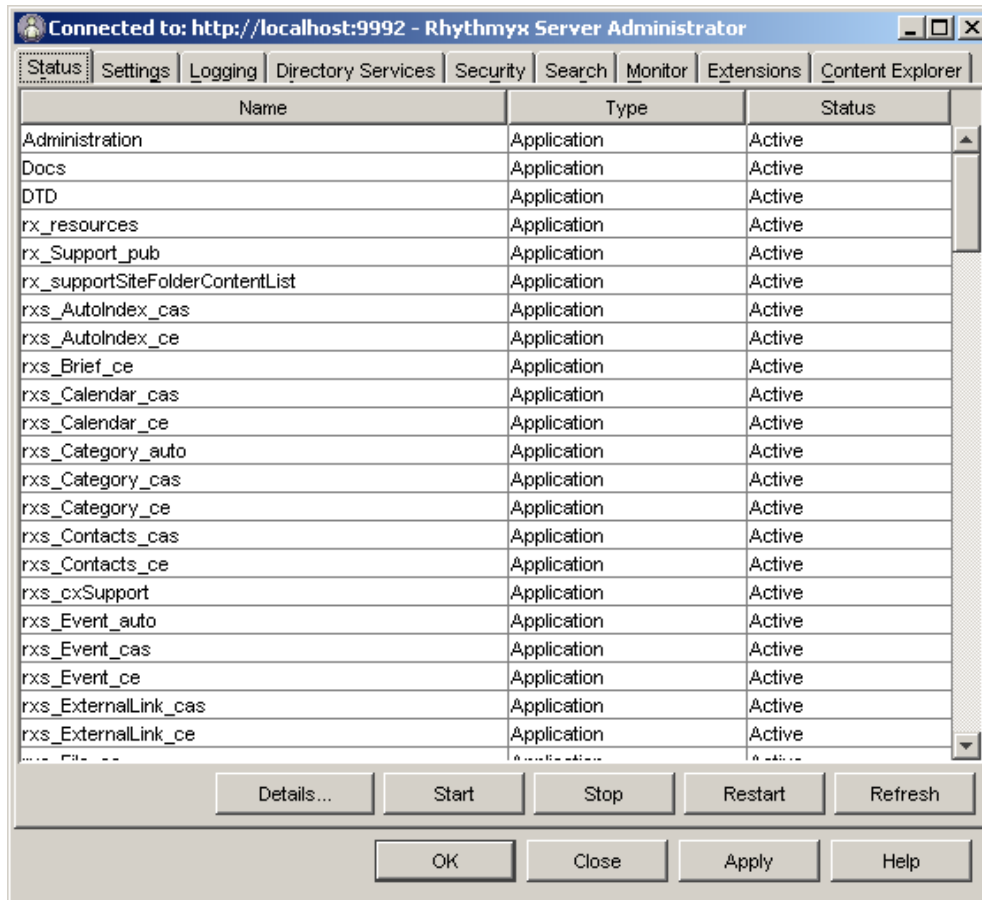


Figure 115: Rhythmix Server Administrator

- 2 Click the Security tab.

- 3 On the Security tab, click the Roles subtab.

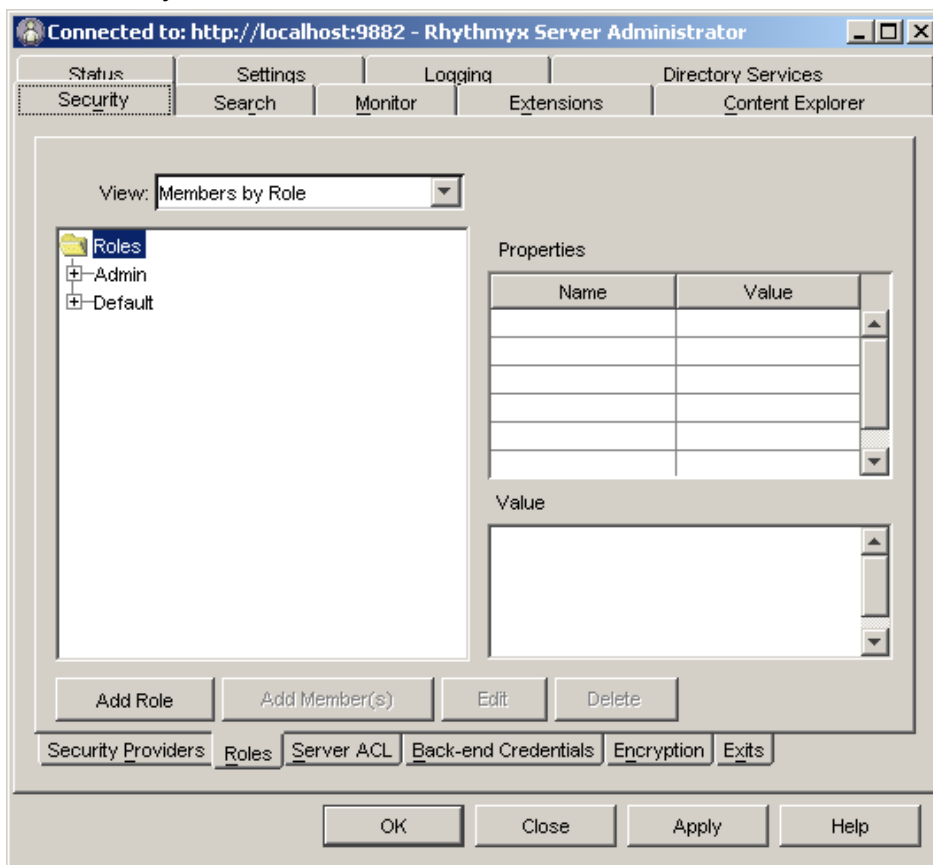


Figure 116: Server Administrator Role Tab

- 4 Click the [Add Role] button.



Rhythmyx displays the New Role dialog.

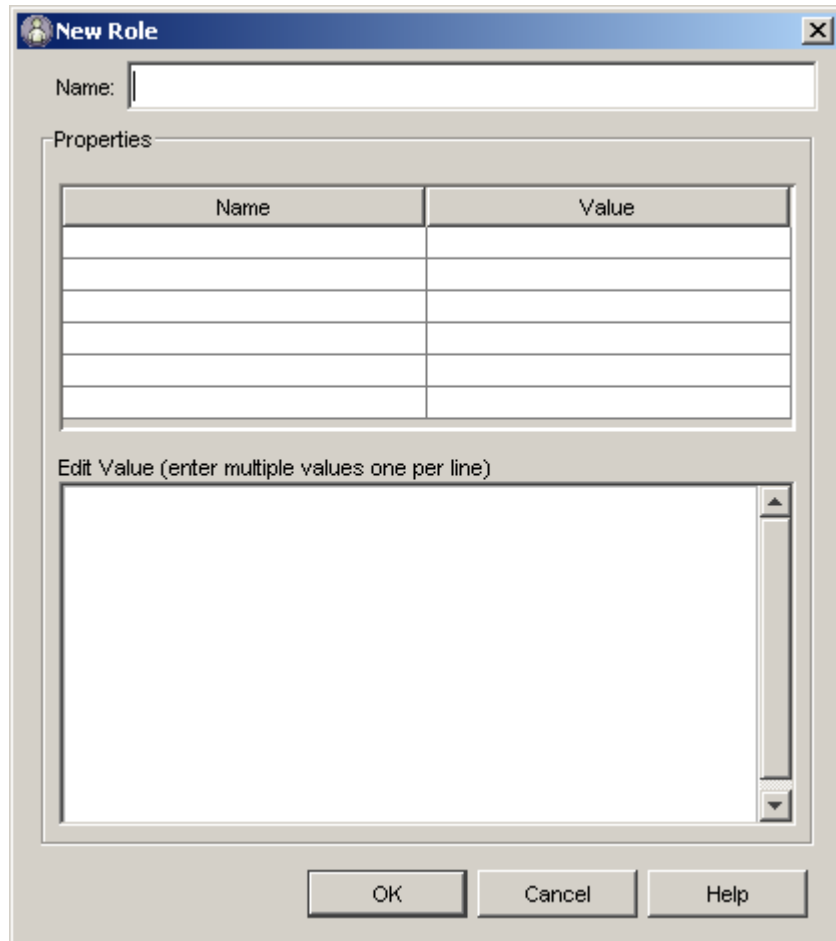


Figure 117: New Role Dialog

- 5 In the Name field enter *XI\_Members*.
- 6 Specify the Property *sys\_defaultCommunity* and a default Community for the Role:
  - a) In the Properties box, double-click in the first row of the Name column and from the drop list, choose *sys\_default Community*.  
Since we haven't created the Express Investments Community yet, we will have to choose another option. For the time being, we will use the Default Community.
  - b) Double-click in the Value column of the row where you just selected *sys\_defaultCommunity* and from the drop list, choose *Default*.  
After we create the Express Investments Community, we can assign it as the Default Community for this Role.

- 7 Click the [OK] button to save the new Role.

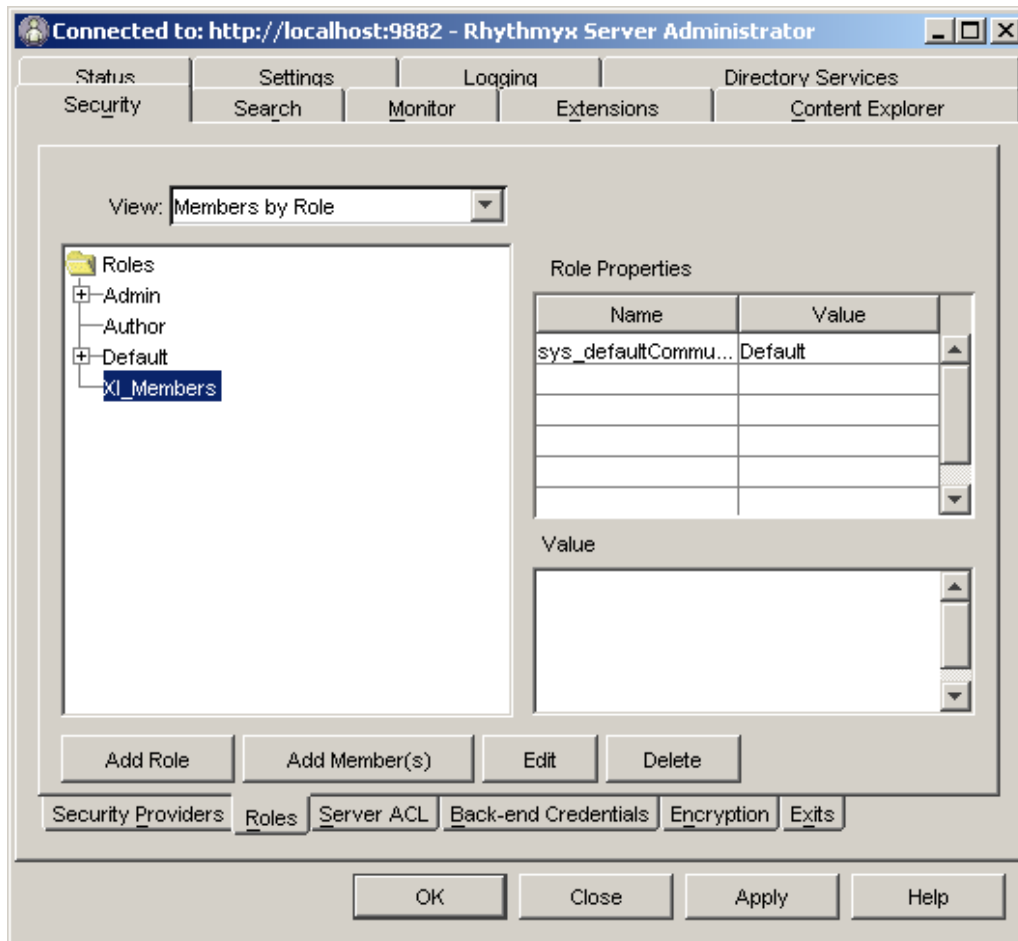


Figure 118: Role Tab showing the XI\_Members Role with the sys\_defaultCommunity Property

Repeat this procedure for any other Roles you need to define.

For more details about maintaining Roles, consult the Rhythmyx Server Administrator Help.

## CHAPTER 6

# Implementing New Communities

---

## Determining the Communities You Need

Communities separate users into similar groups. Communities do not cross Site boundaries, so at a minimum you will need one Community for each Site that you manage in the CMS.

You may want to isolate some users or their content from the rest of the Site Community. For instance, you might want to isolate the content and management of the Human Resources section of an intranet from the rest of the intranet. The CMS for a power company or medical device company might need to isolate regulatory affairs from the rest of Site. Any group of users or content you want to isolate requires a unique Community.

Note that Communities are not hierarchical. You cannot have a Site Community and have, for example, a Human Resources Community subordinate to that Site Community. The Human Resources Community would be an entirely separate and unique Community.

You need to strike a balance when defining your Communities. The Communities need to be big enough that users do not have to change Communities constantly to work with different content. At the same time, you do not want your Communities so large that the user is overwhelmed by the amount of content they have to manage.

---

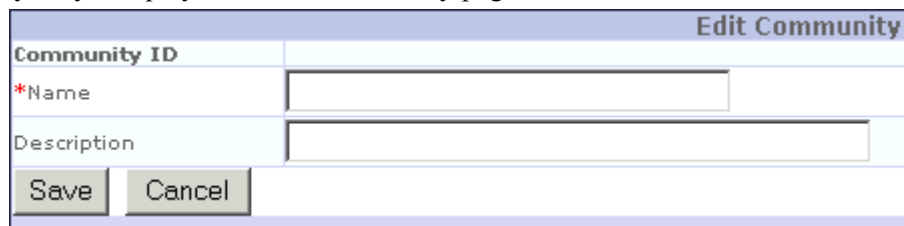
## Creating a Community

When you create a new community, the Edit Community page lets you define the community **Name** (required) and **Description** (optional). To associate *roles* (see "[Associating a Role with a Community](#)" on page 134), *workflows* (see "[Associating a Workflow with a Community](#)" on page 137), *variants* (see "[Associating a Variant with a Community](#)" on page 142), *content types* (see "[Associating a Content Type with a Community](#)" on page 139), *sites* and components with the community, save it and then edit it.

To create a community

1. In Content Explorer, go to the System tab and click Communities.  
Rhythmyx displays the Communities Editor.
2. In the Communities Editor, click [New Community](#).

Rhythmyx displays the Edit Community page.



Edit Community	
Community ID	<input type="text"/>
*Name	<input type="text"/>
Description	<input type="text"/>
Save	Cancel

Figure 119: Edit Community Page

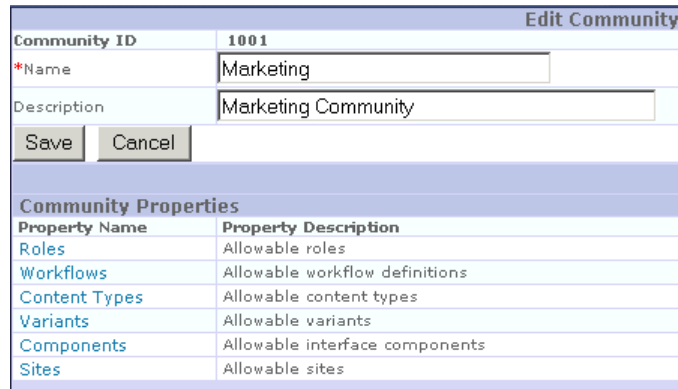
3. Enter a **Name** and optional **Description**.
4. Click [**Save**].

Rhythmyx displays the new community in the Communities Editor.

## Editing a Community

To edit a community:

- 1 In the Communities Administrator, click the name of the community that you want to edit. Rhythmyx displays the Edit Community page.



Community ID		1001
*Name		Marketing
Description		Marketing Community
Save		Cancel
Community Properties		
Property Name	Property Description	
<a href="#">Roles</a>	Allowable roles	
<a href="#">Workflows</a>	Allowable workflow definitions	
<a href="#">Content Types</a>	Allowable content types	
<a href="#">Variants</a>	Allowable variants	
<a href="#">Components</a>	Allowable interface components	
<a href="#">Sites</a>	Allowable sites	

Figure 120: Edit Community Page Showing Community Associations


5. Change the **Name** and/or **Description**.
6. To relate **Roles** (see "[Associating a Role with a Community](#)" on page 134), **Workflows** (see "[Associating a Workflow with a Community](#)" on page 137), **Content Types** (see "[Associating a Content Type with a Community](#)" on page 139), **Variants** (see "[Associating a Variant with a Community](#)" on page 142), **Sites**, and **Components** with the Community, click on the Property Name links.
7. After the changes are complete, click [Save].

---

## Deleting a Community

If you delete a Community, users will no longer be able to log in to that Community. Any Rhythmyx elements (Workflows, Content Types and Content Items, Variants, and Sites) associated with that Community may be inaccessible, unless they are associated with another Community. Even if you add another Community with the same name, these elements will remain inaccessible because Rhythmyx uses the Community ID to process the Communities and the new Community will have a different identifier. Confirm that you can access the Rhythmyx elements associated with the Community from another Community, or that you no longer use any of the elements associated with the Community before you delete it.

To delete a community:

- 1 In the Communities Administrator, click the  next to the name of the community that you want to delete.

---

## Associating a Role with a Community

Users are associated with Communities through their Roles. When you associate a Role with a Community, all members of the Role become members of the Community. If a Role is associated with more than one Community, the user becomes a member of each of the Communities. The Community Login page lists all the Communities associated with the user's Role and lets the user log in through one of those Communities.

---

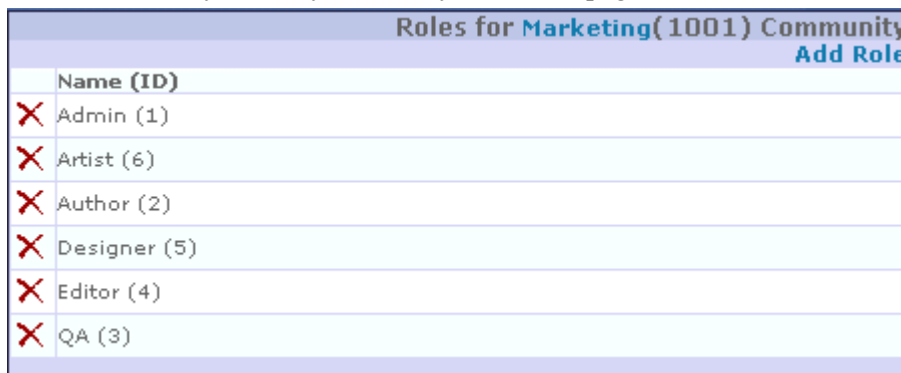
NOTE: Some Roles are assigned to Workflows so they may review and approve content in those Workflows. If you assign Roles that you associate with Communities to a Workflow, the Workflow may only be usable for Content Items in certain Communities. To ensure that a Workflow applies to all Communities, do not assign Roles associated with Communities to Workflows. Instead, give the same user separate Workflow and Community Roles.

---

To associate a Role with a Community:

- 1 On the Edit Community page, click the Roles Property Name.

Rhythmyx displays the Roles for Community page, which displays the roles related to the selected Community. When you initially access the page, it will be blank.



Roles for Marketing(1001) Community	
<a href="#">Add Role</a>	
Name (ID)	
<input type="checkbox"/> Admin (1)	
<input type="checkbox"/> Artist (6)	
<input type="checkbox"/> Author (2)	
<input type="checkbox"/> Designer (5)	
<input type="checkbox"/> Editor (4)	
<input type="checkbox"/> QA (3)	

Figure 121: Roles for Community Page

- 2 Click Add Role.



Rhythmyx displays the Add Roles page, which lists all Roles that are not already related to the Community.



Add Roles for Marketing(1001) Community	
Name (ID)	
<input type="checkbox"/> Admin (1)	
<input type="checkbox"/> Artist (6)	
<input type="checkbox"/> Author (2)	
<input type="checkbox"/> Default (7)	
<input type="checkbox"/> Designer (5)	
<input type="checkbox"/> Editor (4)	
<input type="checkbox"/> QA (3)	

Save Cancel Select All Clear All

Figure 122: Add Roles Page

- 3 Check the Roles that you want to associate with the Community or click [**Select All**] to check all Roles. Click [**Clear All**] to remove all checks.
- 4 Click [**Save**].


Rhythmyx displays the Roles for Community page. The Roles that you have newly associated with the Community are now listed.

---

## Removing a Role's Association with a Community

If you remove a Role's association with a Community, users in that Role will no longer be able to access Rhythmyx elements (Workflows, Content Types and Content Items, Variants, and Sites) associated with that Community.

To remove a role's association with a community:

- 1 On the Edit Community page, click the Roles Property Name.  
Rhythmyx displays the Roles for Community page, which displays the roles associated with the selected community.
- 2 Click the delete button  beside a role to remove its association with the community.

## Associating a Workflow with a Community

Associating a Workflow with a Community makes that Workflow available to users logged in to the Community. A user must be logged in to a Community with which a Workflow is associated to be able to assign content to that Workflow.

To associate a workflow with a community:

- 1 On the Edit Community page, click the Workflows Property Name.

Rhythmyx displays the Workflows for Community page, which displays the workflows associated with the selected community. When you initially access the page, it will be blank.

Workflows for Marketing(1001) Community		<a href="#">Add Workflow</a>
Name (ID)	Description	
<input checked="" type="checkbox"/> Article (1)	Basic Article Workflow	
<input checked="" type="checkbox"/> Images (3)	Image Workflow	
<input checked="" type="checkbox"/> Index (2)	Index Pages and Briefs	

Figure 123: Workflows for Community Page

- 2 Click Add Workflows.

Rhythmyx displays the Add Workflows page, which lists all workflows that are not already associated with the community.

Add Workflows for Marketing(1001) Community	
Name (ID)	Description
<input type="checkbox"/> Article (1)	Basic Article Workflow
<input type="checkbox"/> Images (3)	Image Workflow
<input type="checkbox"/> Index (2)	Index Pages and Briefs

Save   Cancel   Select All   Clear All

Figure 124: Add Workflows Page

- 3 Check the workflows that you want to associate with the community or click [**Select All**] to check all workflows. Click [**Clear All**] to remove all checks.
- 4 Click [**Save**].


Rhythmyx displays the Workflows for Community page. The workflows that you have newly associated with the community are now listed.

---

## Removing a Workflow's Association with a Community

If you remove a Workflow from a Community, Content Items in that Community will no longer be able to use that Workflow. Since all Content exists in one Community and one Workflow, any content in the Workflow will become inaccessible. Only remove a Workflow from a Community if no content exists in the Workflow.

To remove a workflow's association with a community:

- 1 On the Edit Community page, click the Workflows Property Name.  
Rhythmyx displays the Workflows for Community page, which displays the workflows associated with the selected community.
- 2 Click the delete button  beside a workflow to remove its association with the community.

## Associating a Content Type with a Community

Rhythmyx only allows users to create Content Items of Content Types associated with their communities.

To associate a content type with a community:

- 1 On the Edit Community page, click the Content Type Property Name.

Rhythmyx displays the Content Types for Community page, which displays the content types associated with the selected community. When you initially access the page, it will be blank.

Content Types for Marketing(1001) Community	
Name (ID)	Description
<input type="checkbox"/> Article (1)	Used for long, free-form text content items.
<input type="checkbox"/> Article Word (2)	Used for long, free-form text content items that use Microsoft Word2000 as the editing tool.
<input type="checkbox"/> Brief (3)	Used for short content items intended to be used ONLY as part of another content item.
<input type="checkbox"/> External URL (7)	Used to create URL content items that link to pages outside of your content management system.
<input type="checkbox"/> File (5)	Used to create and maintain downloadable content items, such as .pdf or .exe files.
<input type="checkbox"/> Image (4)	Used to create and maintain image content items, such as .gif, .jpg, and other graphic formats.
<input type="checkbox"/> Index (6)	Allows users to explicitly select a group of other content items that go together to define the final published output.
<input type="checkbox"/> IndexAutomated (8)	Allows users to implicitly define an index through a set of parameters which are used by Rhythmyx to automatically generate the actual index for output.
<input type="checkbox"/> Page (9)	This is the default content type used by content connector.

Figure 125: Content Types for Community Page

- 2 Click Add Content Type.

Rhythmyx displays the Add Content Type page, which lists all content types that are not already associated with the community.

Add Content Types for Marketing(1001) Community	
Name (ID)	Description
<input type="checkbox"/> Article (1)	Used for long, free-form text content items.
<input type="checkbox"/> Article Word (2)	Used for long, free-form text content items that use Microsoft Word2000 as the editing tool.
<input type="checkbox"/> Brief (3)	Used for short content items intended to be used ONLY as part of another content item.
<input type="checkbox"/> External URL (7)	Used to create URL content items that link to pages outside of your content management system.
<input type="checkbox"/> File (5)	Used to create and maintain downloadable content items, such as .pdf or .exe files.
<input type="checkbox"/> Image (4)	Used to create and maintain image content items, such as .gif, .jpg, and other graphic formats.
<input type="checkbox"/> Index (6)	Allows users to explicitly select a group of other content items that go together to define the final published output.
<input type="checkbox"/> IndexAutomated (8)	Allows users to implicitly define an index through a set of parameters which are used by Rhythmyx to automatically generate the actual index for output.
<input type="checkbox"/> Page (9)	This is the default content type used by content connector.
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Select All"/> <input type="button" value="Clear All"/>	

Figure 126: Add Content Type Page

- 3 Check the content types that you want to associate with the community, or click [**Select All**] to check all content types. Click [**Clear All**] to remove all checks.
- 4 Click [**Save**].


Rhythmyx displays the Content Type for Community page. The content types that you have newly associated with the community are now listed.

---

## Removing a Content Type's Association with a Community

If you remove a Content Type from a Community, users logged in to that Community will no longer be able to access Content Items of that Content Type.

To remove the association of a content type with a community:

- 1 On the Edit Community page, click the Content Type Property Name.  
Rhythmyx displays the Content Types for Community page, which displays the content types associated with the selected community.
- 2 Click the delete button  beside a content type to remove its association with the community.

---

## Associating a Variant with a Community

Rhythmyx only allows users to use and view variants associated with their communities.

To associate a variant with a community:

- 1 On the Edit Community page, click the Variants Property Name.

Rhythmyx displays the Variants for Community page, which displays the variants associated with the selected community. When you initially access the page, it will be blank.



- 2 Click Add Variant.

Rhythmyx displays the Add Variants page, which lists all variants that are not already related to the community.

- 3 Check the variants that you want to associate with the community, or click [**Select All**] to check all variants. Click [**Clear All**] to remove all checks.
- 4 Click [**Save**].

Rhythmyx displays the Variants for Community page. The variants that you have newly associated with the community are now listed.




---

## Removing a Variant's Association with a Community

If you remove a Variant from a Community, users logged in to that Community will no longer be able to use that Variant to assemble content.

To remove a variant's association with a community:

- 1 On the Edit Community page, click the Variants Property Name.  
Rhythmyx displays the Variants for Community page, which displays the variants associated with the selected community.
- 2 Click the  beside a variant to remove its association with a community.

## Associating a Site with a Community

Rhythmyx only allows users to edit and view sites associated with their Communities.

To associate a site with a Community:

- 1 On the Edit Community page, click the Sites Property Name.

Rhythmyx displays the Sites for Community page, which displays the sites associated with the selected Community. When you initially access the page, it will be blank.

Add Sites for Marketing(1001) Community	
Name (ID)	Description
<input type="checkbox"/> Canada Main (302)	Main Site for Canadian Customers
<input type="checkbox"/> Europe Main (303)	Main Site for European customers
<input type="checkbox"/> US Main (301)	Maint Site for US customers
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Select All"/> <input type="button" value="Clear All"/>	

Figure 127: Sites for Community Page

- 2 Click Add Site.

Rhythmyx displays the Add Sites page, which lists all sites that are not already related to the Community.

Sites for Marketing(1001) Community		Add Site
Name (ID)	Description	
<input checked="" type="checkbox"/> Canada Main (302)	Main Site for Canadian Customers	
<input checked="" type="checkbox"/> Europe Main (303)	Main Site for European customers	
<input checked="" type="checkbox"/> US Main (301)	Maint Site for US customers	

Figure 128: Add Sites Page


- 3 Check the sites that you want to associate with the Community, or click [**Select All**] to check all sites. Click [**Clear All**] to remove all checks.
- 4 Click [**Save**].

Rhythmyx displays the Sites for Community page. The sites that you have newly associated with the Community are now listed.

---

## Removing a Site's Association with a Community

To remove a site's association with a Community:

- 1 On the Edit Community page, click the Sites Property Name.  
Rhythmyx displays the Sites for Community page, which displays the sites associated with the selected Community.
- 2 Click the delete button  beside a site to remove its association with the community.



## CHAPTER 7

# Configuring Publishing

FastForward for Web Content Management is configured to publish to the Tomcat Web application server installed with Rhythmyx. Percussion Software recommends that you use a production-quality Web server in your development environment. Common choices are Microsoft Internet Information Server and the Apache Web Server.

In a production environment, however, it is common to publish to a different machine than the Rhythmyx server. To publish on a remote machine, you should use FTP Publishing.

When publishing Content Items in Site Folders, the publishing process can be time-consuming, taking up to several hours. To alleviate this problem, you can set up "mixed-mode" publishing, which publishes Content Items selectively based on the Folders in which they are stored.

This chapter describes how to define these configurations.

## Setting Up Publishing to a Local Web Server

Percussion Software recommends that in your implementation environment you publish to a robust Web server. This section describes how to configure Publishing to deliver content to a new Site, Express Investments, on the two most common production Web servers: Microsoft Internet Information Server and the Apache Web Server.

We will assume that the Web servers are installed using the defaults, and that a virtual root, named XI\_Home, has been set up for a new Site, Express Investments. We will also assume that you have copied the resources directory for your Site to this location, and that it contains all of the CSS, JavaScript, and static images required to support your Site.

Consult the documentation for your preferred Web server for details about installing and configuring the server, and for instructions to set up the Virtual Root.

Configuring delivery to the Express Investments Site in the Web server involves the following steps:

- 1 Create a new Site Registration for Express Investments.
- 2 Create a new Context Variable for Express Investments, with the required Values.
- 3 Create a new Edition to Publish the Express Investments Site.

## Creating a New Site Registration to Deliver to a Web Server

We will copy the existing Enterprise Investments Site Registration to create the Express Investments Site Registration. To create the new Site Registration:

- 1 In Content Explorer, click the Publishing tab.
- 2 In the left navigation, under Sites, click the By Name link.  
Content Explorer displays the Sites page.
- 3 Click the Copy Site link.  
Content Explorer displays the Copy Site page.
- 4 In the **Source Site** drop list, choose *Enterprise Investments*.
- 5 In the **New Site** field, enter *Express Investments*.

Copy Site	
Source Site	Select the Site you want to copy
	Enterprise Investments
New Site	*Name
	Express Investments
Create	Cancel

Figure 129: Copying the Enterprise Investments Site Registration

- 6 Click the [Create] button.

Content Explorer saves your new Registration and redirects you to the Sites page.

- 7 On the Sites page, click the *Express Investments* link.

Content Explorer displays the Express Investments Site Registration. Other than the name, the data will be the same as the Enterprise Investments Site Registration.

- 8 To configure the Site to Publish to Microsoft Internet Information Server:
- Change the value in the **Description** field from *Represents the Enterprise Investments web site* to *Represents the Express Investments web site*.
  - Change the value in the **Site Address (URL)** field from *http://127.0.0.1:9980/EI\_Home* to *http://127.0.0.1:80/XI\_Home*. (This value assumes that you have used the default port for IIS, 80. If you chose a different port for IIS, substitute that value for *9980*.)
  - Change the value of the **Publishing Root Location** field from *../webapps* to *c:\inetpub\wwwroot\XI\_Home*.
  - Change the value of the **Folder Root** field from *//Sites/EnterpriseInvestments* to *//Sites/ExpressInvestments*.

Edit Site Properties	
<b>Site(id): (306)</b>	
*Site Name	Express Investments
Description	Represents the Enterprise Investments web site
Site Address (URL)	http://127.0.0.1:80/XI_Home
Home Page (URL)	
Publishing Root Location	c:\inetpub\wwwroot\XI_Home
*Publisher	localhost Publisher Default Port ▾
Status	Active ▾
Folder Root	//Sites/EnterpriseInvestments
Global Template	enterprise-global-template ▾
Nav Theme	▾
<b>FTP Information:</b>	
IP Address	127.0.0.1
Port Number	21
User ID	
Password	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 130: Site Registration for Internet Information Server

- 9 To configure the Site to publish to the Apache web server, the value of the Publishing Root Location field must point to a subdirectory of Apache's default publishing root, <Apacheroot>\htdocs. For example: c:\Program Files\Apache Group\Apache\htdocs\XI\_Home. Otherwise the Site Registration is the same as for IIS.

Edit Site Properties	
<b>Site(id): (306)</b>	
*Site Name	Express Investments
Description	Represents the Enterprise Investments web site
Site Address (URL)	http://127.0.0.1:80/XI_Home
Home Page (URL)	
Publishing Root Location	c:\Program Files\Apache Group\Apache\htdocs\XI_Home
*Publisher	Localhost Publisher Default Port
Status	Active
Folder Root	//Sites/EnterpriseInvestments
Global Template	enterprise-global-template
Nav Theme	
<b>FTP Information:</b>	
IP Address	127.0.0.1
Port Number	21
User ID	
Password	
Save Cancel	

Figure 131: Site Registration to Deliver to the Apache Web Server

- 10 Click the [Save] button to save the Site registration.

## Creating Context Variables for Delivery to a Web Server

Context Variables substitute local paths for internal Rhythmyx paths in published output. These substitute paths ensure that the HTML pages will retrieve CSS, Javascript files, and static images from the local resources directory rather than from the directory on the Rhythmyx server.

To create a Context Variable:

- 1 On the Publishing tab of Content Explorer, in the left navigation, under Variables, click the By Name link.  
Content Explorer displays the Variables page.
- 2 Click the New Variable link.  
Content Explorer displays the Edit Global Variables page.
- 3 In the **Name** field enter *Express Investments*.



- 4 In the **Value** field enter `/XI_Home/resources`. (This is the path to the resources directory for the Express Investments Site on IIS.)
- 5 In the **Context** drop list, choose *Publish*.
- 6 In the **Site** drop list, choose *Express Investments*.

Figure 132: Global Variable for Internet Information Server

- 7 Click the [Save] button to save the new Variable.

You may also want to create an additional Value for the Preview Context. The Preview Context points to a location on the Rhythmyx server (typically a subdirectory of the `web_resources` directory; in our case, this subdirectory is named `express_investments`.)

To add another Value to the Express Investments Global Variable:

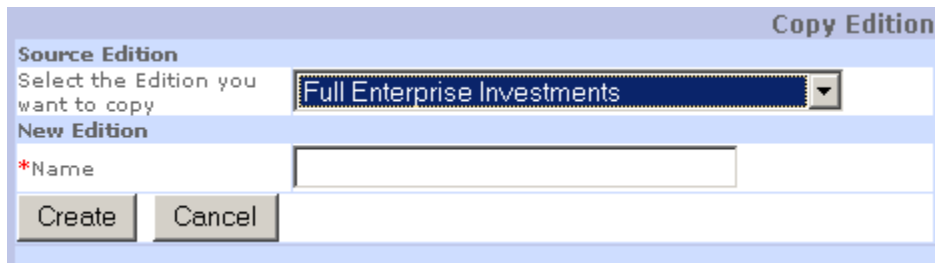
- 1 Navigate to the Variables page on the Publishing tab of Content Explorer.
- 2 In the row with Express Investments, click the Add Value link.  
Content Explorer displays the Edit Global Variable page.
- 3 In the **Value** field, enter `../web_resources/express_investments`.
- 4 In the **Context** drop list, leave the value as *Preview*.
- 5 In the **Site** drop list, choose *Express Investments*.
- 6 Click the [Save] button to save the new Value.

## Creating a New Edition to Publish to a Web Server

We will create the new Edition by copying the Full Enterprise Investments Edition. To create the new Edition:

- 1 On the Publishing tab of Content Explorer, in the left navigation, under Editions, click the [By Name](#) link.  
Content Explorer displays the Editions page.
- 2 Click the Copy Edition link.  
Content Explorer displays the Copy Edition page.
- 3 In the **Source Edition** drop list, choose *Full Enterprise Investments*.

- 4 In the **New Edition** field, enter *Full Express Investments*.



The screenshot shows a 'Copy Edition' dialog box. At the top right, it says 'Copy Edition'. Below that, there are two sections: 'Source Edition' and 'New Edition'. Under 'Source Edition', there is a label 'Select the Edition you want to copy' and a dropdown menu currently showing 'Full Enterprise Investments'. Under 'New Edition', there is a label '\*Name' followed by an empty text input field. At the bottom of the dialog, there are two buttons: 'Create' and 'Cancel'.

*Figure 133: Copying the Full Enterprise Investments Edition*

- 5 Click the [**Create**] button to create the new Edition.  
Content Explorer processes your request and redirects you to the Editions page.
- 6 Click the Full Express Investments link.  
Content Explorer displays the Edit Edition Properties page for the Full Express Investments Edition.
- 7 In the **Destination Site** drop list, choose *Express Investments*.
- 8 Click the [**Save**] button to save your changes.

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## Setting Up FTP Publishing

Common practice is to run the Rhythmyx server on a separate machine from the production Web server. To publish to a remote machine, you must use FTP publishing.

We will assume that you have your virtual root defined on your Web server. As with your local Web server, you must copy the contents of the <Rhythmyxroot>/web\_resources directory to the virtual folder directory.

You must also create a Virtual Directory in your FTP server that will point to the virtual root in your Web server. For the purposes of this exercise, we will assume that the virtual directory is called ftpUser and that it points to the wwwroot directory. We will also assume that the user account for access to the FTP site is ftpUser, and that this user has *password* as their password.

To set up FTP Publishing:

- 1 Create a Publisher registration for a FTP Publisher.
- 2 Create a new Site definition that uses the Publisher created in Step 1
- 3 Create a Content List Registration with a URL that includes *deliverytype=ftp*.
- 4 Define a new Edition that uses the Content List Registration created in Step 3

To use FTP, you must define a Publisher configuration with the necessary data.

To define a Publisher to use FTP:

- 1 In Content Explorer, choose the Publishing tab.
- 2 In the left navigation, under Publishers, click the By Name link.  
Rhythmyx displays the Publishers page.
- 3 Click the New Publisher link.  
Rhythmyx displays a blank Edit Publisher page.
- 4 In the **Publisher Name** field, enter *Localhost FTP Publisher*.
- 5 Optionally, in the **Description** field, enter a description, such as *Publish to remote Web server via FTP*.
- 6 In the **IP Address** field, enter *localhost* or the IP address of your local Rhythmyx server.
- 7 In the **Port** field, enter *9980* (or the port you assigned to the Rhythmyx Web application server).
- 8 In the **Status** drop list, select *Active*.
- 9 In the **CMS User Name** field, enter *rxpublisher*. In the **CMS Password** field, enter *demo*.
- 10 In the **Publisher User Name** field, enter *ftpUser* (or the name of the user you have configured to access your FTP server). In the **Publisher Password** field, enter *password* (or the password of the user you have configured to access your FTP server).

The completed configuration should resemble the following screenshot:

Publisher(id): Localhost FTP Publisher(303)		Edit Publisher
*Publisher Name	Localhost FTP Publisher	
Description	Publish to laptop FTP site	
*IP Address	10.10.10.147	
Port	9980	
Status	Active	
CMS User Name	rxpublisher	
CMS Password	*****	
Publisher User Name	ftpUser	
Publisher Password	*****	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		
Configuration Parameters		Add User Param
Name	Value	Description
<input checked="" type="checkbox"/> debug	true	test debug
<input checked="" type="checkbox"/> filesystem	com.percussion.publisher.client.PSFilePublisherHandler	test filesystem
<input checked="" type="checkbox"/> ftp	com.percussion.publisher.client.PSFtpPublisherHandler	test ftp
<input checked="" type="checkbox"/> statusurl	/Rhythmyx/sys_pubSupport/pubstatus.xml	test statusurl

Figure 134: FTP Publisher Configuration

- 11 Click the [Save] button to save the Publisher configuration.

Rhythmyx returns you to the Publishers page. The new Publisher will be included in the list of Publishers.

Publishers				
New Publisher				
	Publisher(id)	Description	IP Address	Status
<input checked="" type="checkbox"/>	Localhost FTP Publisher(303)	Publish to laptop FTP site	bobj	Active
<input checked="" type="checkbox"/>	Localhost Publisher Default Port(301)	Connects to a publisher running on default port on the same machine as the Rhythmyx server	127.0.0.1	Active

Figure 135: Publisher Page showing Localhost FTP Publisher listed

## Defining a Site Registration for FTP Publishing

You must define a Site configuration to use the FTP Publisher to publish the Content on the remote machine. We will copy and modify the Enterprise Investments Site Registration for our Site.

To create a Site for FTP Publishing:

- 1 In Content Explorer, choose the Publishing tab.
- 2 In the left navigation, under Sites, click the By Name link.  
Rhythmyx displays the Sites page.
- 3 Click on the Copy Site Link.  
Content Explorer displays the Copy Site Page
- 4 In the **Source Site** drop list, choose *Enterprise Investments*.
- 5 In the **New Site** field enter *Enterprise Investments FTP*.

The screenshot shows a dialog box titled "Copy Site". It has two main sections: "Source Site" and "New Site". In the "Source Site" section, there is a dropdown menu labeled "Select the Site you want to copy" with "Enterprise Investments" selected. In the "New Site" section, there is a text input field labeled "\*Name" containing the text "Enterprise Investments FTP". At the bottom of the dialog, there are two buttons: "Create" and "Cancel".

Figure 136: Copying the Enterprise Investments Site Registration as Enterprise Investments FTP

- 6 Click the [Create] button to save the new Site Registration.
- 7 On the Sites Page, click the Enterprise Investments FTP link.  
Rhythmyx displays the Edit Site page for the Enterprise Investments FTP Site.
- 8 In the **Description** field, add the phrase *published to FTP* to the end of the text.
- 9 Delete the value in the **Publishing Root Location** field. This value is not useful when publishing through FTP.
- 10 In the **Publisher** drop list, select *Localhost FTP Publisher* (specifying that this Site will use the Publisher we just registered).
- 11 In the **FTP Information: IP Address** field, enter the IP address of your FTP server.
- 12 In the **FTP Information: Port Number** field, enter the port of your FTP server (the default is 21).
- 13 In the **FTP Information: User ID** field, enter *ftpUser* (or the name of the user with access rights to your FTP server).
- 14 In the **FTP Information : Password** field, enter *password* (or the password of the user with access rights to your FTP server).

The completed configuration should resemble the following screenshot:

Edit Site Properties	
<b>Site(id): (307)</b>	
*Site Name	Enterprise Investments FTP
Description	Represents the Enterprise Investments web site
Site Address (URL)	http://127.0.0.1:9980/EI_Home
Home Page (URL)	
Publishing Root Location	
*Publisher	Localhost FTP Publisher
Status	Active
Folder Root	//Sites/EnterpriseInvestments
Global Template	enterprise-global-template
Nav Theme	
<b>FTP Information:</b>	
IP Address	10.10.10.32
Port Number	21
User ID	ftpUser
Password	XXXXXXXXXX
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 137: Site Registration for FTP Publishing

- 15 Click the [Save] button to save the Site configuration.

The new site configuration will be added to the list of available Sites:

Sites			
	Site(id)	Description	Last Publication Date
	Corporate Investments (303)		2005-03-29 16:25:12.0
	Corporate Investments - Mirror(304)		
	Enterprise Investments (301)	Represents the Enterprise Investments web site	2005-03-30 08:25:52.0
	Enterprise Investments FTP(307)	Represents the Enterprise Investments web site	
	Enterprise Investments-Mirror(302)	Represents a mirror server for Enterprise Investments web site	

Figure 138: List of Sites showing new FTP Site

## Defining an FTP Content List Registration

The Site Root Full Content List registration included with FastForward is configured to Publish to a local file system. It includes a URL that defines the *deliverytype* as *filesystem*.

We want to use the same Content List application on the Rhythmyx server to generate the content for Publishing, but we want to Publish to a remote location using FTP. We will therefore copy the URL from the Site Root Full Content List registration, and modify it in our new registration.

To create an FTP Content List registration:

- 1 In Content Explorer, choose the Publishing tab.
- 2 In the left navigation bar, under Content Lists, click the By Name link.  
Rhythmyx displays the Content List Administration page.
- 3 Click the Site Root Full link.  
Rhythmyx displays the edit Content List page for the Site Root Full Content List.
- 4 Copy the value of the *URL* field to the clipboard.
- 5 Under Content Lists, click the By Name link to return to the Content List Administrator..
- 6 Click the New Content List link.  
Rhythmyx displays a blank Edit Content List page.
- 7 In the **Name** field, enter *Site Root Full - FTP*. Enter the same value in the **Description** field.
- 8 In the **URL** field, paste the URL from the clipboard.
- 9 In the URL, find the *deliverytype* attribute. Change the value of the attribute from *filesystem* to *ftp*.  
Original URL:  
`/Rhythmyx/rx_Support_pub/folder_clist.xml?valid=y,i&delivery=filesystem&pubOp=pub`  
Modified URL:  
`/Rhythmyx/rx_Support_pub/folder_clist.xml?valid=y,i&delivery=ftp&pubOp=pub`
- 10 In the **Edition Type** drop list, select *Automatic*.

When you are finished, the new Content List registration should look like the following screenshot:

Figure 139: Content List Registration for FTP. Notice that the `deliverytype=ftp` attribute has been highlighted.

- 11 Click the [Save] button to save the new registration.

Rhythmyx returns you to the Content List Administrator page. The new Content List registration will be included in the list of registrations.

## Defining an Edition to Use the FTP Content List

Once you have defined your Content List registration, you must create an Edition that will use this Content List. We will copy and modify the Full Enterprise Investments Edition.


To create an FTP Edition:

- 1 In Content Explorer, choose the Publishing tab.
- 2 In the left navigation bar, under Editions, click the By Type link.  
Rhythmyx displays the Editions page.
- 3 Click the *Copy Edition* link.  
Content Explorer displays the Copy Edition page.
- 4 In the **Source Edition** drop list, choose *Full Enterprise Investments*.
- 5 In the **New Edition** field, enter *Full Enterprise Investments FTP*.

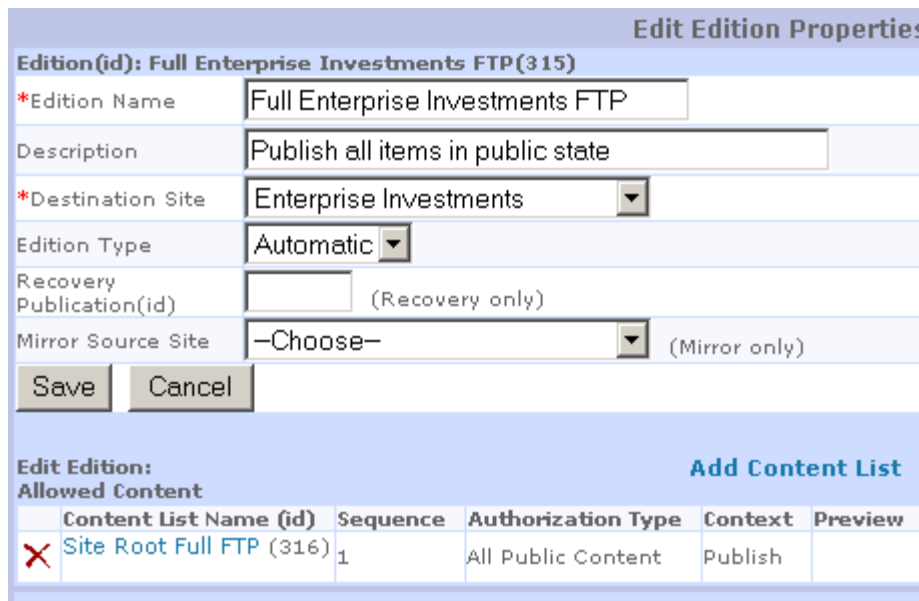
Figure 140: Copying the Full Enterprise Investments Edition for FTP Publishing

- 6 Click the [Create] button to create the new Edition.
- 7 On the Editions page, click the Full Enterprise Investments FTP link.  
Content Explorer displays the Edit Edition Properties page.



- 8 In the **Description** field, add *using FTP* to the end of the text.
  - 9 In the **Destination Site** drop list, choose *Enterprise Investments - FTP*.
  - 10 Click the delete button  in the row of the Site Root Full Content List to remove this Content List from the Edition.
  - 11 Click the Add Edition Content List link.
- Rhythmyx displays the Edit Edition Content List page.
- 12 In the **Content List** drop list, choose *Site Root Full - FTP*.
  - 13 In the Sequence field, enter *1*.
  - 14 In the **Authorization Type** drop list, choose *All Public Content*.
  - 15 In the **Context** drop list, choose *Publish*.
  - 16 Click the [Save] button to save the Edition Content List assignment.

Rhythmyx returns you to the Edit Edition Content List page for the Full Internet - FTP Edition. The completed Edition should resemble the following screenshot:



**Edit Edition Properties**

**Edition(id): Full Enterprise Investments FTP(315)**

\*Edition Name: Full Enterprise Investments FTP

Description: Publish all items in public state

\*Destination Site: Enterprise Investments

Edition Type: Automatic

Recovery Publication(id): (Recovery only)

Mirror Source Site: -Choose- (Mirror only)

Save Cancel

**Edit Edition: Allowed Content** [Add Content List](#)


	Content List Name (id)	Sequence	Authorization Type	Context	Preview
	Site Root Full FTP (316)	1	All Public Content	Publish	

Figure 141: FTP Edition


## Running the FTP Edition

Once you have completed setting up to Publish the FTP Edition, you can publish it.

To publish the FTP Edition:

- 1 On the Publish tab of Content Explorer, go to the left navigation bar and under Editions, click the [By Name](#) link.

Rhythmyx displays the Editions page.

- 2** In the row of the Full Internet - FTP Edition, click the Run Edition button .  
Rhythmyx will publish the Edition as usual.
- 3** When the Edition is complete, go to your Virtual Root directory. You should see a directory structure similar to that of the Editions you have published previously.

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## Setting Up Mixed Mode Publishing

When publishing Content Items in Site Folders, the publishing process can be time-consuming, taking up to several hours. One way to improve the performance of the Publisher is to publish only those Content Items that change. Some types of content, such as images and other binary files, change rarely, so you do not need to republish them frequently. Furthermore, the process of assembling these Content Items is also time consuming. By excluding them from regular publishing runs, you can significantly improve publishing performance.

In Content Explorer, Image and File Content Items are typically stored in unique Folders under the Site's root Folder. This practice mirrors best practice for Web site management, which is to store images and binaries in separate directories dedicated specifically to such files. In Content Explorer, you can mark these Folders to publish in special Editions. This technique is referred to as "mixed-mode publishing".

To set up mixed-mode publishing:

- 1 In Content Explorer, flag Folders you want to receive special processing by checking the **Publish Only in Special Edition** checkbox.
- 2 Set up Site Folder Content List registrations to process Content Items based on whether this checkbox is checked.
- 3 Add these Content Lists to an Edition.

## Flagging Folders for Mixed-mode Publishing

Mixed-mode Publishing assumes that you store infrequently published Content Items (such as images and binary files) in unique Folders dedicated specifically to that purpose. If you currently store such Content Items in a more dispersed manner (such as keeping them in the same Folder as the text Content Items with which they are associated), you must re-organize them into dedicated Folders.

Assuming that your Image and File Content Items are stored in dedicated Folders, the first step in setting up mixed-mode publishing is to flag these Folders for special processing. For the purposes of this exercise, we will flag the Images Folder in the Enterprise Investments Site.

To flag the Images Folder in the Enterprise Investments Site:

- 1 In Content Explorer, expand the Enterprise Investments Site so you can see the Images Folder. Right-click on this Folder and from the popup menu, choose *Properties*.  
Rhythmyx displays the Folder Properties dialog.

- 2 On the General tab, check the **Publish Only in Special Edition** checkbox, as illustrated in the following screenshot:

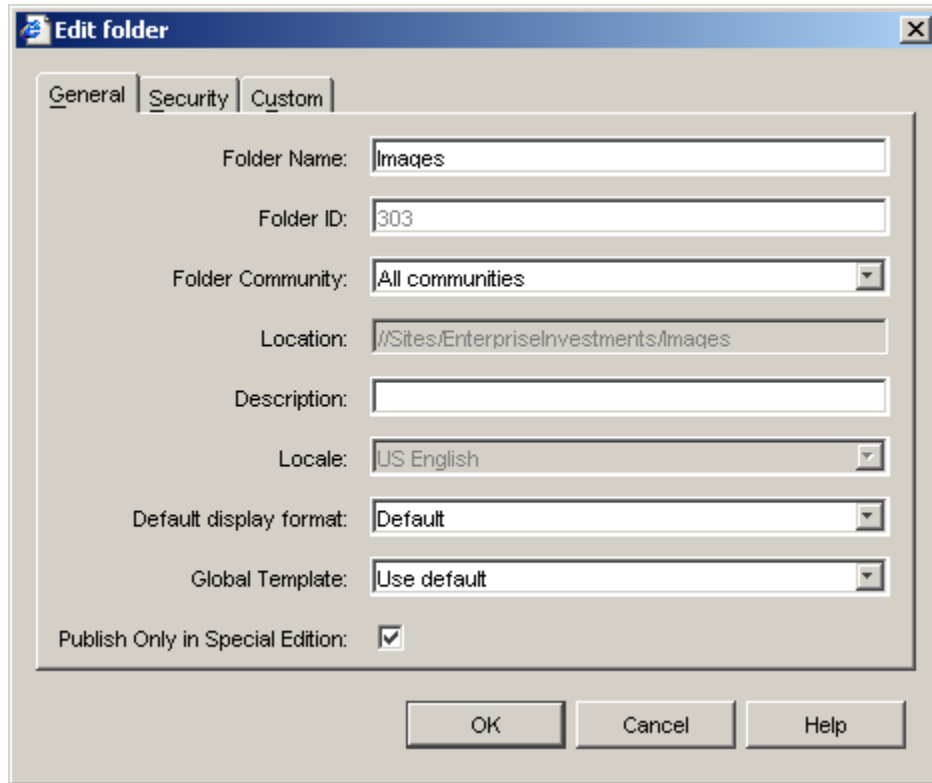


Figure 142: Fast Forward Images Folder Marked for Mixed-mode Publishing

- 3 Click the **[OK]** button to save your change.

Rhythmyx closes the Folder Properties dialog and returns you to Content Explorer. Note the red check mark on the Images Folder, which designates a Folder flagged for special publishing processing.

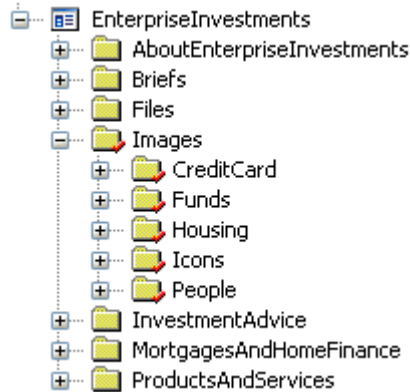


Figure 143: Images Folder and Subfolders Flagged for Mixed-mode Publishing

Note also that all of the Subfolders of the Images Folder are similarly flagged. The flag cascades to all Subfolders of the marked Folder, and is disabled on all of these Folders.

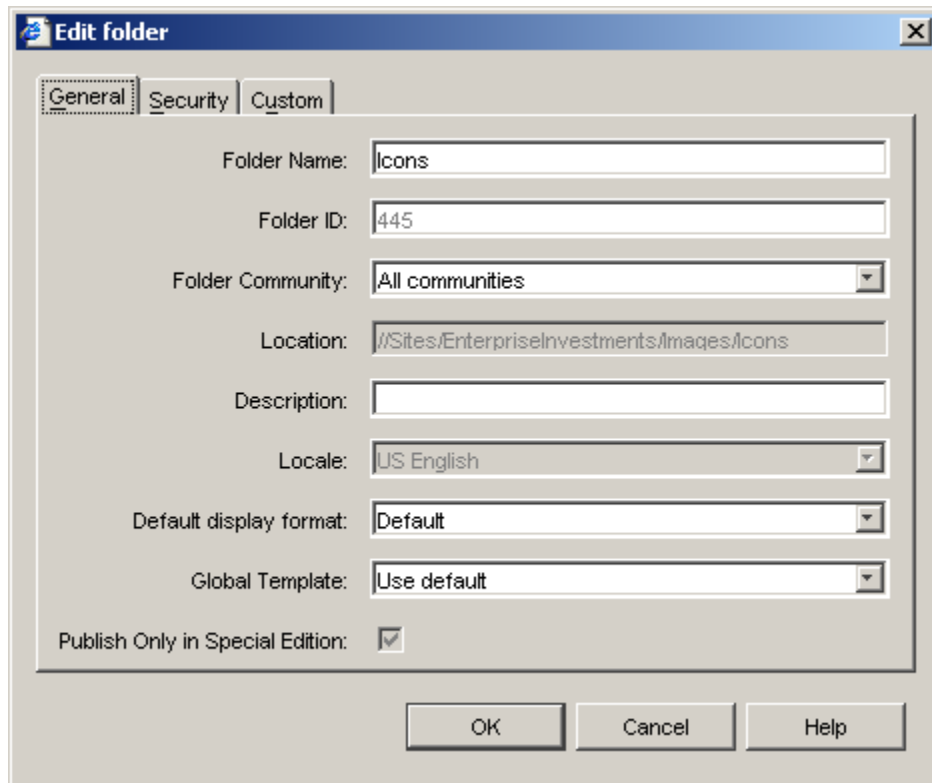


Figure 144: Icons Subfolder of the Images Folder, with Publish Only in Special Edition flag disabled.

You cannot unflag a specific Subfolder. If you do not want special processing on a specific Subfolder, you must uncheck the flag on the parent and flag each of the other child Folders.

## Setting Up Content Lists for Mixed-mode Processing

The second step in implementing mixed-mode Publishing is to define Content List registrations to process the flagged or unflagged folders.

To register a Content List to support mixed-mode publishing, you must add the `IncludeFolders` HTML parameter to the Content List URL. The `IncludeFolders` parameter can take the following values:

- **flagged**  
Publish only Folders with the **Publish Only in Special Edition** box checked.
- **unflagged**  
Publish only Folder with the **Publish Only in Special Edition** box unchecked.

- all

Publish all Folders, regardless of whether the **Publish Only in Special Edition** box is checked. This is the default behavior if the `IncludeFolders` parameter is not in the Content List URL, or if the value of the parameter is anything other than *flagged* or *unflagged*.

For example, to set up a new Content List that would publish Content Items other than those in the Images or Files Folders, we can copy the URL from an existing Content List registration, and modify by adding the `IncludeFolders` parameter:

```
IncludeFolders=unflagged
```

To set up this Content List:

- 1** On Content Explorer, click the Publishing tab.
- 2** On the Publishing tab, in the left navigation bar, under Content Lists, click the By Name link. Rhythmyx displays the Content List Editor.
- 3** In the Content List column, click the Site Root Full link. Rhythmyx displays the Site Root Full Content List Registration.
- 4** Copy the value of the Content List URL field:  
`/Rhythmyx/rx_support_pub/folder_clist.xml?valid=y,i&delivery=files  
ystem&pubOp=pub`
- 5** Click the [**Cancel**] button. Rhythmyx returns you to the Content List Editor.
- 6** Click the New Content List link. Rhythmyx displays a blank Edit Content List Page.
- 7** Enter a **Name** for the Content List Registration (for example, *Site Root Text Only*).
- 8** Enter a **Description** for the Content List registration (for example, Site Root without Images or Files).
- 9** Paste the URL into the **URL** field, then go to the end of the URL and add `IncludeFolders=unflagged`:  
`/Rhythmyx/rx_support_pub/folder_clist.xml?valid=y,i&delivery=files  
ystem&pubOp=pub&IncludeFolders=unflagged`
- 10** In the **Edition Type** drop list, choose *Automatic*.

- 11 The following graphic illustrates this Content List Registration:

The screenshot shows a dialog box titled "Edit Content List" for a content list with ID "Site Root Text Only (316)". It contains the following fields:

- \*Name:** Site Root Text Only
- Description:** Site Root without Images or Files
- URL:** y=filesystem&pubOp=pub&IncludeFolders=unflagged
- \*Edition Type:** Automatic (dropdown menu)

At the bottom of the dialog are "Save" and "Cancel" buttons.

Figure 145: Content List Registration to Publish Only Unflagged Folders

- 12 Click the [Save] button to save the Content List Registration.

Rhythmyx returns you to the Content List Editor.


The process of setting up a Content List Registration to publish only flagged Folders would be almost identical, except that you would add `IncludeFolders=flagged` to the URL (and use a different **Name** and **Description** for the Content List).

## Setting Up an Edition to Publish a Mixed-mode Content List

The final step in setting up mixed-mode Publishing is to define an Edition to use the mixed-mode Content List registration. For the purposes of this exercise, we will set up an Edition to use the Site Root Text Only Content List registration we previously created. We will base this Edition on the Full Enterprise Investments Edition.

To create the Text Only Edition:

- 1 In Content Explorer, click on the Publishing tab.
- 2 On the Publishing tab, in the left navigation bar, under Editions, click the [By Type](#) link.  
Rhythmyx displays the Editions Editor.
- 3 Click the [Copy Edition](#) link.  
Rhythmyx displays the Copy Edition page.
- 4 In the **Source Edition** drop list, choose *Full Enterprise Investments*.
- 5 Enter a name in the **New Edition** field (for example, *Full Enterprise Investments - Text Only*).
- 6 Click the [Create] button.  
Rhythmyx creates the new Edition and returns you to the Editions Editor. The new Edition will be included in the list of available Editions.
- 7 Click on the [Full Enterprise Investments - Text Only](#) link.  
Rhythmyx displays the Edition Editor for the [Full Enterprise Investments - Text Only](#) Edition.

- 8 The Edition includes the Site Root Full Content List, which you must delete, then add the Site Folder Text Only Content List.
  - a) Click on the  button to delete the Site Root Full Content List.

Rhythmyx processes your request.
  - b) Click the [Add Content List](#) link.

Rhythmyx displays the Edition Content List page.
  - c) In the **Content List** drop list, choose *Site Root Text Only*.
  - d) In the **Sequence** field, enter *1*.
  - e) In the **Authorization Type** drop list, choose *Site Folder*.
  - f) In the **Context** drop list, choose *Publish*.
  - g) Click the [**Save**] button to save the Content List to the Edition.

Rhythmyx returns you to the Full Enterprise Investments - Text Only Edition.
- 9 Click the [**Save**] button to save the Edition.

If you created a Content List registration to publish only flagged Folders, create another Edition that uses only that Content List as well.

## Testing Mixed-mode Publishing

Several options are available for testing mixed-mode publishing:

- Create two new Content Items, one in a flagged Folder and one in an unflagged Folder, and move them to Public. Run the Edition that publishes only unflagged Folders. Look in the directory analogous to the unflagged Folder where you created the new Content Item, and you should find this new Content Item. Check the directory analogous to the unflagged Folder, and you should find that the new Content Item from that Folder has not been published.
- Set up a new Site registration to publish to a new location. Run one the Edition you set up to publish unflagged Folders and check the output. You should only see directories analogous to the unflagged Folders, plus their content. Clear this directory and run the Edition that publishes flagged Folders. You should only see directories analogous to the flagged Folders, plus their content. This approach tests full publishing.



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