



FirstSpirit™

Unlock Your Content

Manual for editors (WebClient) FirstSpirit™ Version 5.0

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1 WebClient 5.0 – for editors

For editors that work with content management systems only rarely or little, FirstSpirit provides an intuitive and easy-to-operate authoring interface through WebClient (also called WebEdit). It allows content to be edited **directly on a website** in a browser. This way, the editor can immediately see what effect changes will have on the website later on.

The editor works on what are known as “preview pages”, which operate largely without distracting control elements and pop-up windows. Control elements on the page are **not permanently visible**; instead, they are displayed only when the editor moves the mouse over the area that can be edited.

In important places, on the other hand, maintenance of the site is supported by **assistants** (also called “wizards”). These are designed to guide the user through individual maintenance steps and to inform the user about input that has happened or is still necessary. In ideal cases, much of the suitable information will already be specified and only a little bit more input is required by the editor.

Moreover, **drag & drop** is supported as a control form in many places. For instance, this allows images and files to be quickly and intuitively transferred from a workstation computer to WebClient. It also allows existing content (such as text or images) to be moved with the click of a mouse.

In addition to navigation through a website to be edited using the navigation that the preview itself provides, WebClient provides a window on the right edge of the screen that allows topic and user-specific views of the project. These are termed **Reports**.

Structure

The structure of this documentation follows roughly the WebClient's design on the screen:

- **Menu functions** (Chapter 2, page 7): Menu functions available in the bar at the **top** of a page are explained here.
- **Report area** (Chapter 3, page 36): Individual reports available on the **right** side of the screen are explained here.
- **Editing a preview page** (Chapter 4, page 75): All of the options for creating and editing content directly on the preview page are explained here. An important part play the so-called **input elements** (Chapter 4.6, page 119).



Terms

Some of the specialized terminology that comes up repeatedly when working with FirstSpirit is explained below:

Projects

FirstSpirit can be implemented in companies for a variety of purposes. For instance, it can be used to create and manage a company's intranet (with in-house information) in addition to a company's website.

In order to meet various requirements, what is known as a **project** can be made available in FirstSpirit for each of the implementation areas. The intranet should not be available to users other than company employees (i.e. it should be secured), for instance. However, the pages on the public company website should not be available in just HTML, but rather they should be available as a printable and downloadable PDF version.

For more terms, also refer to the [The FirstSpirit operating concept](#) (Chapter 4.1, page 76) page.

Example project

The following documentation is based on a “Mithras Energy” example project, which is provided standard with FirstSpirit. This way the reader can follow along and understand the presented functions directly in the system.

Disclaimer

! This documentation is provided for information purposes only. e-Spirit may change the contents hereof without notice. This documentation is not warranted to be error-free, nor subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. e-Spirit specifically disclaims any liability with respect to this documentation and no contractual obligations are formed either directly or indirectly by this documentation. The technologies, functionality, services, and processes described herein are subject to change without notice.



2 WebClient menu functions

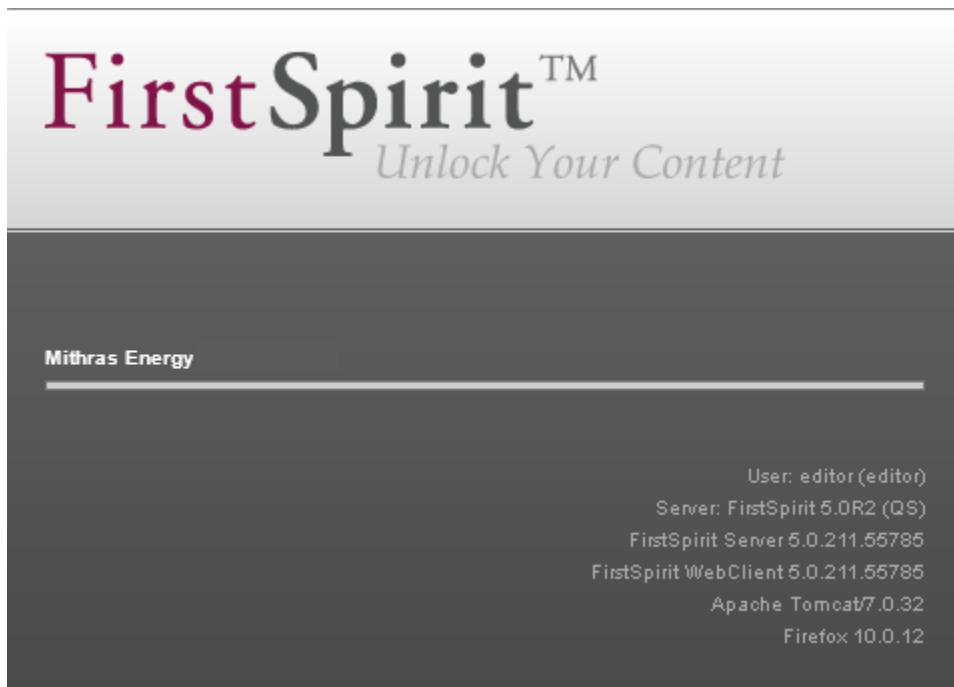
A menu bar with the most important functions that can be carried out on the current page is located in the upper area of WebClient.



1) FirstSpirit information

You can use this area to display information about the actual project, about the used FirstSpirit version et al. If required, the information can be copied from the dialog which will open by clicking on this area.

The dialog will close again if you click outside the dialog.



2) Page status

This area provides the current state of a page.



This may, for instance, be a page that has been released, modified or is in a workflow. Depending on the status of a page, actions displayed in a drop-down menu can be performed.

Also refer to the [Page status](#) (Chapter 2.1, page 9) page.

3) History area

It is possible to undo the most recent changes made to a page or to restore undone changes using this area.

Furthermore, [bookmarks](#) (Chapter 3.3, page 45) can be created here.

Also refer to the [History area](#) (Chapter 2.2, page 16) page.

4) Content area

The functions in the “Content” area allow pages to be added and the navigation structure to be changed.

Also refer to the [Content area](#) (Chapter 2.3, page 17) page.

5) Media area

In the “Media” area, new media for the website can be uploaded and media on the site can be modified.

Also refer to the [Media area](#) (Chapter 2.4, page 28) page.

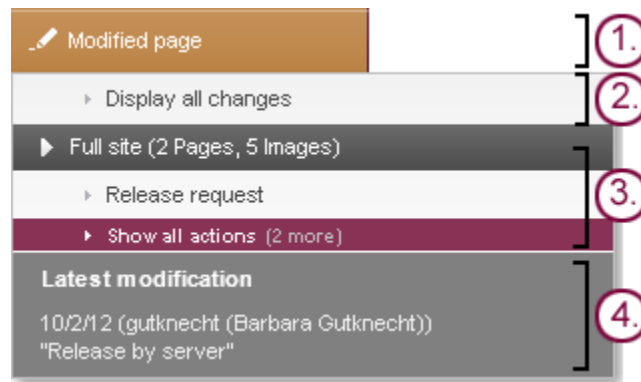
6) Action area

What are known as context-free workflows and additional functions that can vary from project to project are located in the “Actions” area.

Also refer to the [Actions area](#) (Chapter 2.5, page 35) page.



2.1 The page status on the menu bar



The current status of a page can be found at this spot on the menu bar and functions that depend on the status can be carried out.

1. Status of the page
2. common actions
3. workflow actions
4. Latest modifications

The status for a page can have the following states:

- Released page (Chapter 2.1, page 11)
- Modified page (Chapter 2.1, page 11)
- In workflow (Chapter 2.1, page 12)
- Historic version (Chapter 2.1, page 13)
- Comparison view (Chapter 2.1, page 14)
- Hidden sections (Chapter 2.1, page 15)

Furthermore, **notifications** (Chapter 2.1, page 15) about changes currently being made on this page, such as by other users, are shown in this area.

Depending on a page's status, actions can be performed here. The available actions are shown in a drop-down menu that opens if the mouse pointer is hovered over the status.

Actions

Depending on the page's status, one option is to carry out **general actions** that apply for each page, e.g.

- **Display all changes:**
Selecting this option causes all content, where changes have been made since the last release, to be highlighted visually. Even deleted sections are shown when calling this function.
- **Revert to this version**
The displayed version of the current page can be restored by selecting this option. This means that all changes made after the displayed version are lost.
- **Display hidden sections:**
Some sections of the page can be hidden (for more about this, refer to the **Editing window** (Chapter 4.2.1, page 86) page). Calling this function changes the **page status** and the hidden sections are shown in the preview. They are shown in a grayed out form.

Alternatively, **workflows** can be started or continued here. For an explanation of workflows, also see the **Tasks** (Chapter 3.4, page 48) page.

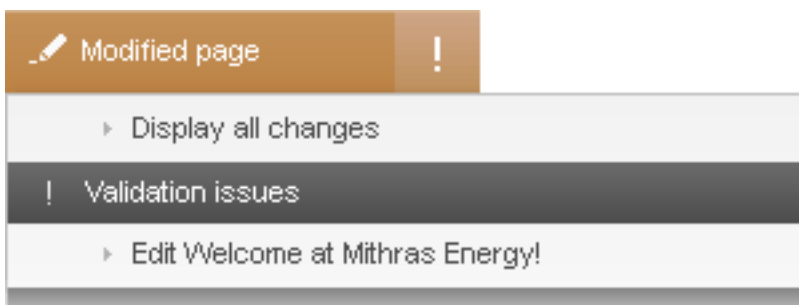
The number of entries in this area and what they are called depends on the respective project and, if applicable, the page the editor is currently on.

Validation issues

According to the specific project configuration the menu item “Validation issues” can be displayed. Here, so-called “rule violations” are shown. Click on an entry (here: “Edit Welcome at Mithras Energy!”) to open the related **form** (Chapter 4.2.1, page 86) to correct the input there directly.

See also page **Rule violations** (Chapter 4.2.1.3, page 94).





Released page

This status means that the page has been released. For an explanation of releases, also see the [Release](#) (Chapter 3.4.2, page 54) page.

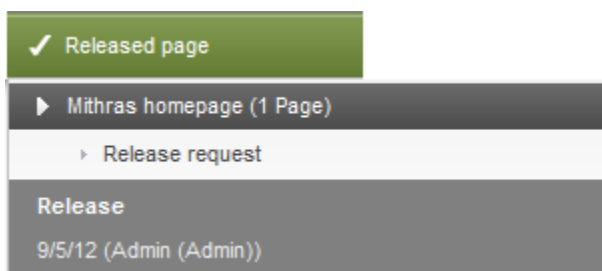
General actions: The “Display hidden sections” action can be performed on “Released pages”.

Workflow actions: In cases of “Released pages”, all of the workflows that can be carried out or started on the current page are displayed here.

In this example, release for the current page can be requested.

If other actions are available, they can be displayed below by clicking on the small arrow, e.g. release can be requested for the current page without media or just for the media on the page.

Latest modification: When the current page was last released and who released it is displayed here.



Modified page

This status means that the page has been modified and has not been released. In order for the page to be published in its current state, it requires release.



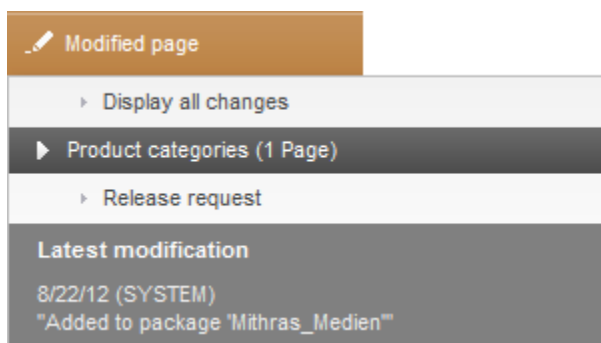
General actions: A “Display all changes” action can be performed on “Modified pages”. All of the sections where changes have been made since the last release are highlighted visually. Deleted sections are also shown by calling this function.

Workflow actions: In cases of “Modified pages”, all of the workflows that can be carried out or started on the current page are displayed here.


In this example, a release can be requested for the page including the 5 media files.

If other actions are available, they can be displayed below by clicking on the small arrow, e.g. a release can be requested for the current page without media or just for the media on the page.

Latest modification: When the last change was made to the current page and which editor made the change is displayed here.



In workflow

This status means that the page is in a workflow. In other words, a workflow has already been started. The  icon means that the page in this status is write-protected and cannot be edited; only the next workflow action can be performed.

General actions: A “Display all changes” action can be performed on “Pages in a workflow”. All of the sections where changes have been made since the last release are highlighted visually. Deleted sections are also shown by calling this function.

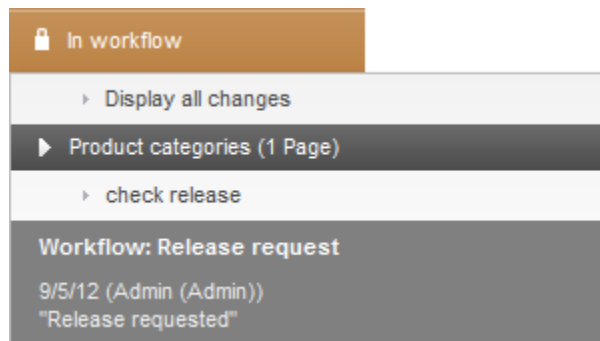
Workflow actions: In cases of pages “in a workflow”, the next available workflow actions are shown here.

In this example, the current page can be checked to see whether it can be released.

If other actions are available, they can be displayed on the bottom by clicking on the small arrow.

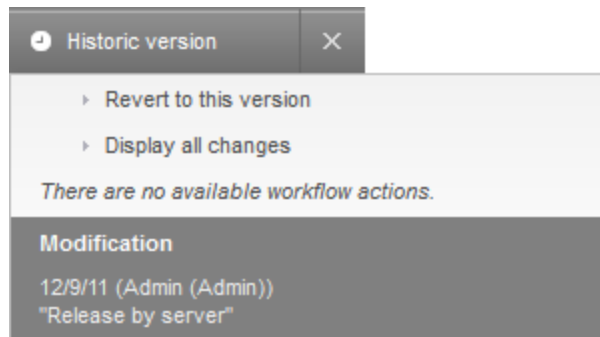
Last change: When the last workflow action was performed and who performed the action is shown here.





Historic version

This is an earlier version of the currently displayed page. Earlier versions can be retrieved using the [page or project history](#) (Chapter 3.5, page 63) in the report area.




General actions: In this status, the currently displayed (historic) version of the page can be restored (**Revert to this version**). All changes made since the displayed version will be discarded.

All areas where changes have been made since the selected release state are highlighted visually using **Display all changes**. The status changes to the [Comparison view](#) (Chapter 2.1, page 14). Deleted sections can also be displayed in the "Comparison view".

Workflow actions: No workflow actions are available on "Historic versions".

Latest modification: The release state of the page currently being displayed is specified here, i.e. when displayed content was released and by whom.

 Clicking on this icon switches back to the current version of the page.

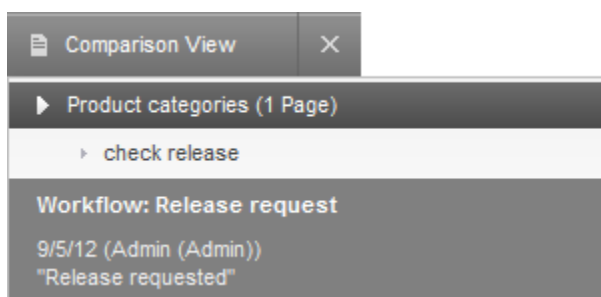


Comparison view

If “Display all changes” has been called on a

- **Modified page** (Chapter 2.1, page 11)
- **Historic version** (Chapter 2.1, page 13) or
- **Page in a workflow** (Chapter 2.1, page 12)

the current preview page switches to the “Comparison view”. Editorial changes to the current preview page are compared with the last released state here and the changes are visualized (“Where are the differences relative to the released page?”). The modified areas are highlighted in the preview. Also refer to **The project history** (Chapter 3.5, page 63) page.



General actions: If sections have been deleted on the current page, they can be added back to the page using the respective “Restore section” entry.

Workflow actions: In the “Comparison view”, the next available workflow actions are shown here.

In this example, release for the current page can be requested.

If other actions are available, they can be shown below by clicking on the small arrow.

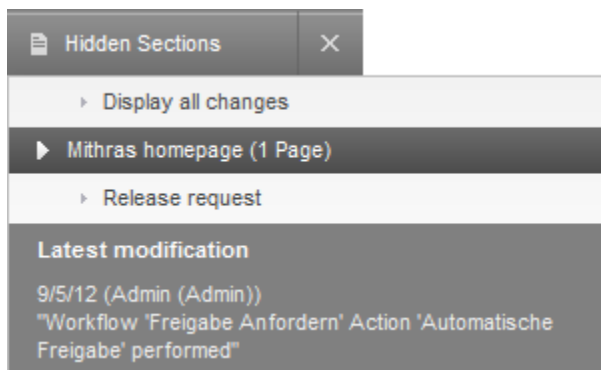
Lastest modification: When the last change was made to the current page and which editor made the change is displayed here.

 Comparison view can be exited again by clicking on this icon.




Hidden sections

If there are hidden sections on a page (see also page [Editing content](#) (Chapter 4.2.1, page 86)), they can be made visible in the preview using the **Display hidden sections** function. They are shown grayed out.



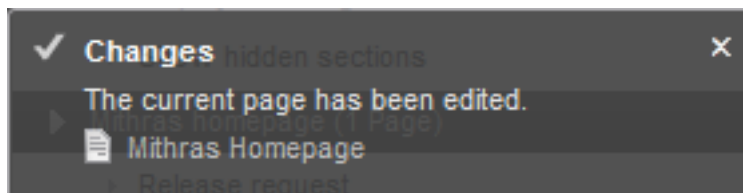
Workflow actions: In this view, the next available workflow actions are displayed. In this example, release of the current page can be checked. If there are more actions available, they can be shown by clicking on the arrow down.

Latest modification: When the last change was made to the current page and which editor made the change is displayed here.

 Clicking on this icon switches back to the current version of the page. The hidden sections are no longer displayed.

Notifications

Notifications for the current page are shown in this area, e.g. if the page is being edited by another user or a workflow has been performed on the page. They could also be messages from other users such as the administrator.



2.2 The history area on the menu bar

The functions from the history area provide the option of undoing content changes on a page. The change history only remains intact until the user leaves the current page. The history is lost if the user switches between two pages.

This functionality is designed to give the editor some security for being able to correct changes made in haste.

The following functions are available here:



Undo: The last change on the page is undone by clicking on this icon. Hovering the mouse pointer over this icon outlines the applicable section with the last change in the preview.


Restore: The last undone change to the page is restored by clicking on this icon. Hovering the mouse pointer over this icon outlines the applicable restored section in the preview.


! Changing the content again exits the timeline. This means that undone changes can then no longer be restored.

You can see whether the “undo” or “restore” function for a change is available on the page by the arrow on the icon lighting up. If the arrow is dark, then there have not been any changes on the page that can be undone or restored.

The state of the page is up-to-date and contains all changes undertaken if the restore icon is darkened.

Add bookmark: Clicking on this button records the current page or data record in the [list of personal bookmarks](#) (Chapter 3.3, page 45).

The  icon means that no bookmark is set for this page yet.

The  icon means that a bookmark is already set for the current page. If this icon is clicked, the bookmark for this page is removed. Bookmarks can also be deleted using the [list of personal bookmarks](#) (Chapter 3.3, page 45) in the report area.

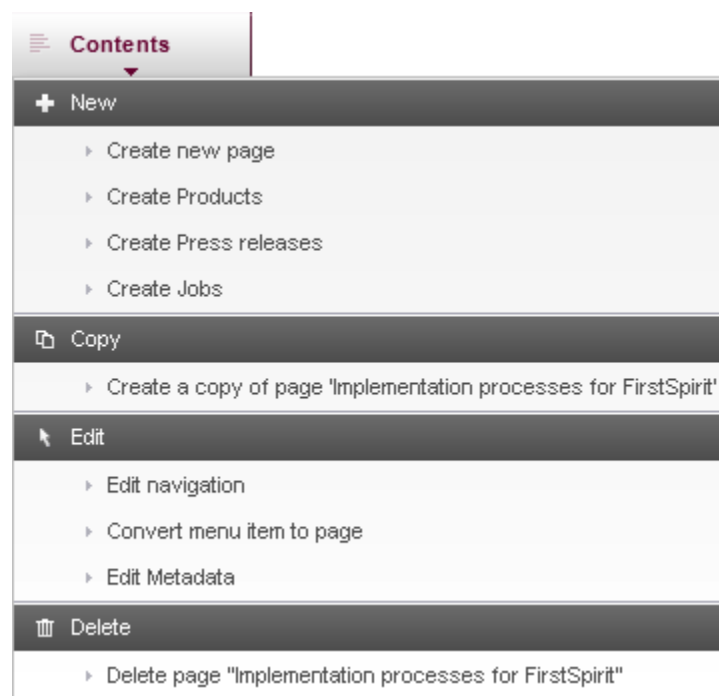


2.3 The content area on the menu bar

The functions available in this area allow website pages and menu items to be added and reorganized.

New - Create new page: A new page can be added in the website's menu structure by calling this function. The [Create new page](#) (Chapter 2.3.1, page 18) dialog opens where all of the necessary information can be specified.

According to the specifications of the project developer, further entries can be available beneath **New**, for example “Create products”. These can be used for creating new [data records](#) (Chapter 4.1, page 81) of specific types (e. g. products). A [dialog](#) (Chapter 2.3.2, page 22) will open in which all required information can be entered. See also page [Editing contents – Data records](#) (Chapter 4.2.1.1, page 88) and [Working with data records](#) (Chapter 4.5, page 114).



Copy - Create a copy of page: A copy of the current page can be added to the website's menu structure as a new page by using this function. The new menu item is always created at the same menu level behind the selected menu item in the process.



Edit - Edit navigation: A window with the project's menu structure opens in a folder view. Here, menu levels can be moved to another position in the navigation structure and be renamed as needed.

Edit - Convert menu item to page: The current page can be removed from the navigation structure using this function. This process can be undone for the current page by calling the function again (**Edit - Convert page to menu item**).

! This page can be accessed at a later time using the search function or the **Related elements** (Chapter 3.6, page 69) area, e.g. to add it back to the navigation structure.

Edit - Edit meta data: According to the project configuration, meta data for the current page or menu item can be stored, edited or deleted by using this function. A **window for editing meta data** (Chapter 4.2.1.2, page 89) will open.

Delete - Delete page: According to the specific project configuration the current page can be deleted by using this function.

2.3.1 Adding a new page

Calling the **New - Create new page** function opens a dialog for adding a new page to the website's navigation. All of the settings required for adding a new page can be made here.

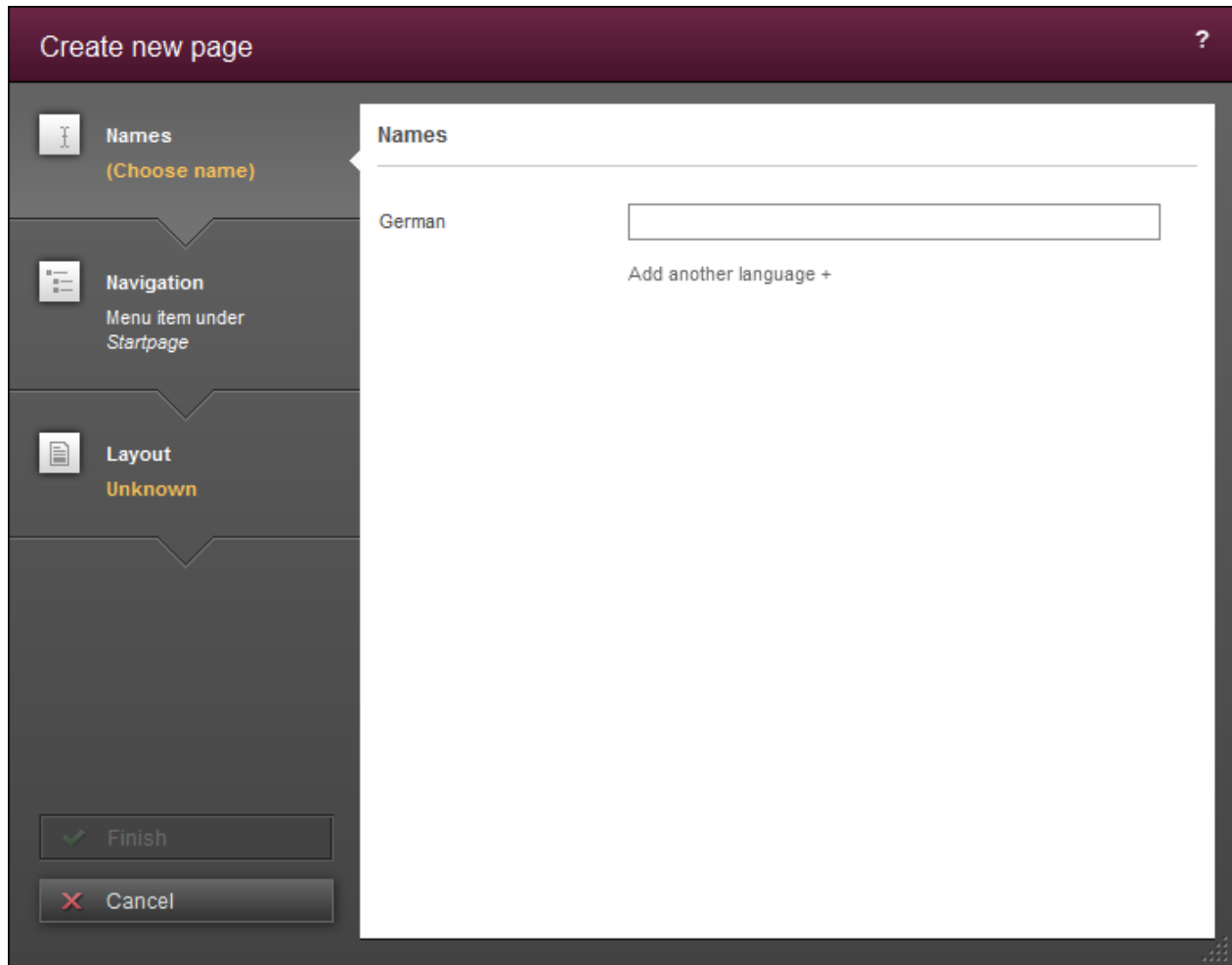
Three areas are located on the left area of the window

1. **Names** (Chapter 2.3.1, page 19)
2. **Navigation** (Chapter 2.3.1, page 20)
3. **Layout** (Chapter 2.3.1, page 21)

Settings that have already been made are shown for each area. In this context, orange-colored text symbolizes that a mandatory setting is missing.

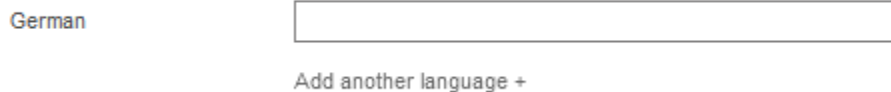
Selecting an area causes the associated setting options to be displayed on the right side of the window.





Names

A name can be specified for the page for each project language. By default, this name is also used for labeling the menu item that is created. However, it can be changed later as needed at any time (see the [Editing navigation](#) (Chapter 2.3.3, page 26) page). The page can also be found under this name, for instance, in selection dialogs.



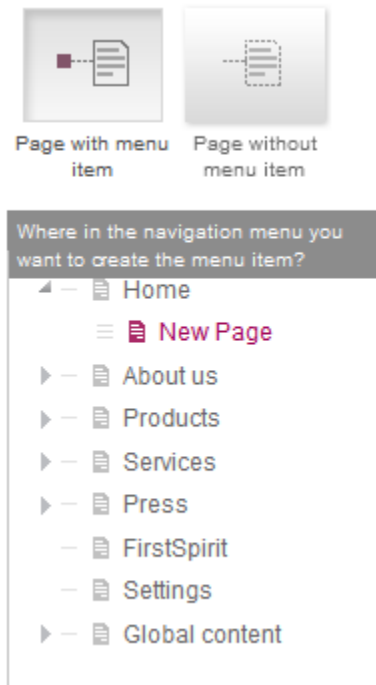
The name for the master language is always used as the preset. Names for other project languages can be edited using the “Add another language” button.




It must be noted that, at the very least, a name always has to be specified for the master language.

Navigation

The position where the new page is to be created in the website's navigation is specified in this area.



The preselected setting is that the new **page** is created with its own new **menu item**. In this case, the new page is added underneath the page currently selected in the navigation. The name of the new page appears at the predefined position in the displayed navigation.

The new menu item (with new page) can be dragged to another spot in the navigation by using the  icon with the left mouse button held down.

The option **Page without menu item** has to be selected if the new page is **not** to be incorporated into the navigation via its own menu item.

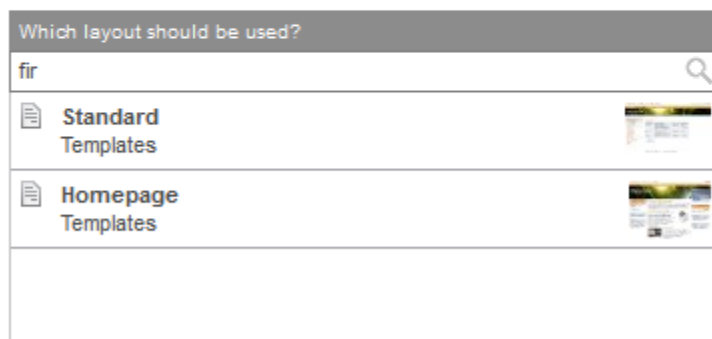
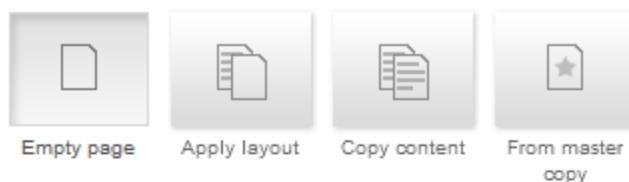
! A page without a menu item cannot be reached via the navigation. It can be reached using the search function or the **Related elements** (Chapter 3.6, page 69) area.



Layout

The appearance for each page has to be defined. This is done by selecting what is known as a **page template** (Chapter 4.1, page 80). Available templates are listed with a small preview in order to provide guidance to help you select the right page.

There are three kinds of templates to select for the new page and for adding the page to the website:



Empty page: If this option is selected, then all of the page templates available to the editor are shown in the selection list. An empty page with the selected template is then added to the website.

Apply layout: If this option is selected, then existing website pages are shown as templates in the selection list. An empty page with the same page layout as the selected page is then added to the project.

Copy content: If this option is selected, existing website pages are shown as templates in the selection list. The selected page is added in its entirety, i.e. with all its content intact.

From master copy: If this option is selected, then all pages are shown in the selection list which are marked as master in the **Bookmarks** (Chapter 2.2, page 16). The selected page is the added in its entirety, i.e. with all its content intact.

Search field: If the layout of a page is to be applied, the search field can be used to limit the selection for the available page.

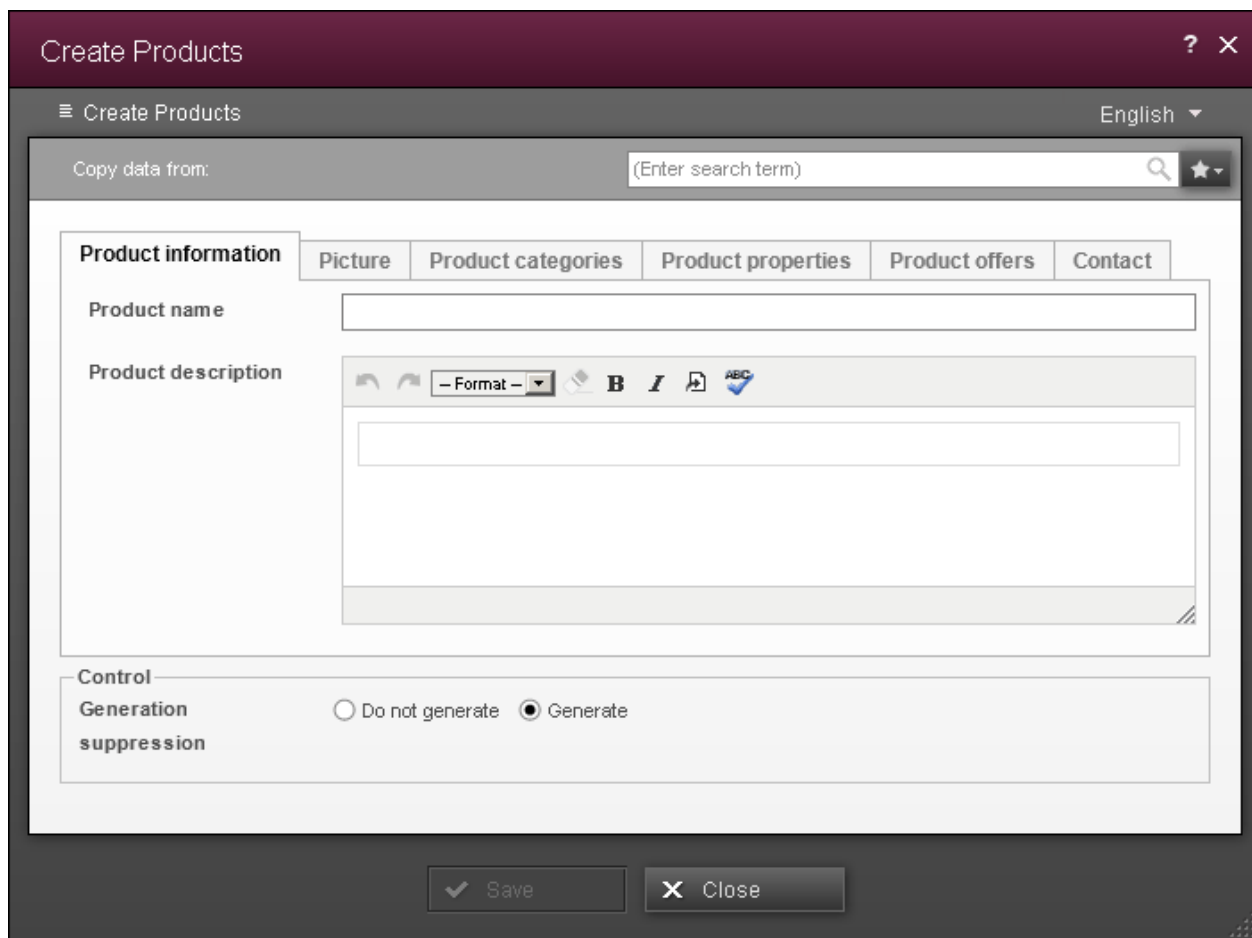


Words or parts of words that appear on the desired page can be entered in the search field. The list of pages is thereby reduced to the possible results.

2.3.2 Create new data record

Depending on the project developer's specifications, additional entries can be available under **New**, for example, "Create product". With this, you can newly create data records of a certain type (for example, products). A dialog opens, in which all necessary information can be specified.

Depending on the configuration, different **input elements** (Chapter 4.6, page 119) have to be filled in in this.



Copy data from



Using this search field, data of an already-existing data record can be taken over. Refer to the pages on the [Edit window](#) (Chapter 4.2.1, page 86) and [Selection dialog](#) (Chapter 4.2.2, page 97). The search is already limited to the basic content source.

The data of the selected data record are taken over in the dialog and can be edited further as needed.

Select master copy



With this icon all available data record master copies can be shown. The data of the selected master copy will be taken over in the dialog and can be edited further as needed.

If no data record master copy exists, the icon is disabled.

Output of the data record

Saving the input data concludes the creation of the new data record, and it is automatically added to the corresponding content source. If the data of the content source within the project is output on a page, then the output is correspondingly extended. After saving, there is an automatic redirection to the detail page of the data record.

If the dialog for creation of a new data record is closed without saving, then no new data record is created. All entries made within the dialog up to that point are lost.

Products overview



Test product

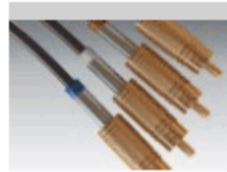
Size
1.23 x 0.63 x 0.08 m

Weight
0.1 kg

Service life
12 year(s)

Delivery period
1 week(s)

[More Information](#) ▶



Connector

Size
0.012 m

Weight
0.1 kg

Service life
15 year(s)

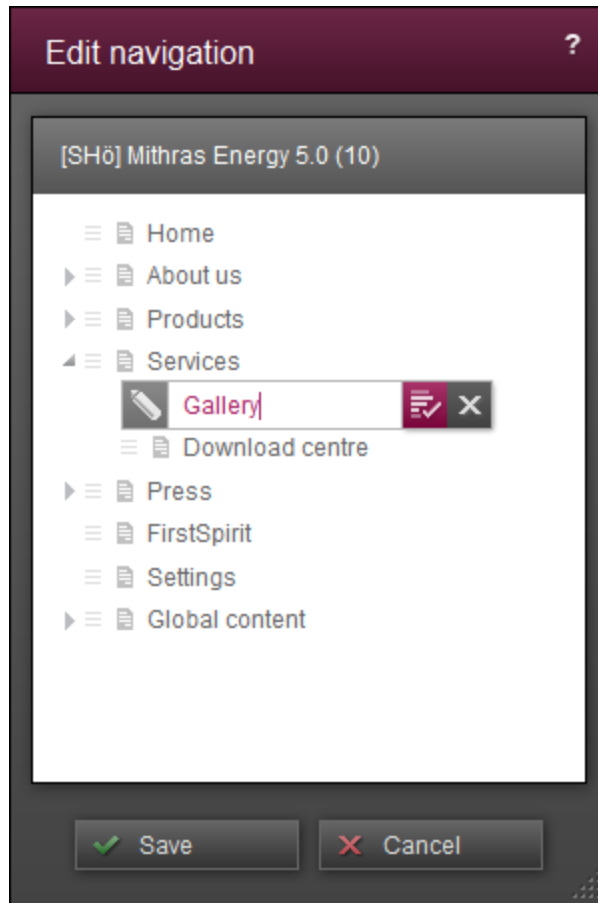
Delivery period
1 week(s)

[More Information](#) ▶

2.3.3 Editing navigation

A dialog for changing the navigation for the website is opened by calling the **Edit - Edit navigation** function.





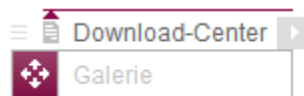
In order to change the location of a menu item within the navigation, the menu item can be moved to a desired location by clicking and dragging it with the left mouse button.


In the process, menu items can be moved

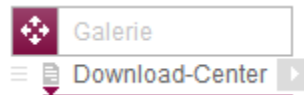
- **to the same menu level** in front of or behind another menu item
- **one menu level lower**


Moved menu items are shown in the dialog in blue text.

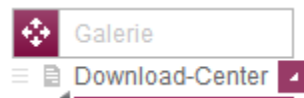
Movement options for a menu item





The selected menu item can be moved in front of another menu item at the same menu level. The green arrow pointing upward  on the menu item's folder symbol shows where the selected menu item is being moved to.



The menu item can be moved behind another menu item at the same menu level. The green arrow pointing downward  on the menu item's folder symbol shows where the selected menu item is being moved to.



The menu item can be moved one menu level lower below another menu item. The green arrow pointing to the right  on the menu item's folder symbol and the arrow surrounded by green  show where in the navigation the selected menu item is being moved to in this case.

Renaming a menu item

You can rename menu items by clicking or double-clicking directly on their name.



Changes can be saved by using the green check mark.

Changes can be discarded by clicking on the red X.

2.3.4 Removing/adding pages in the menu structure

Convert menu item to page

The current page is removed from the website's navigation by calling the **Edit - Convert menu item to page** function, this means the page is **NOT** deleted, but rather just no longer shown in the navigation. This page can be added back to the navigation, either immediately or at a later time.

It is converted immediately, without a confirmation prompt.



! The page can then no longer be accessed using the navigation. This page can be accessed at a later point using the search function or the **Related elements** (Chapter 3.6, page 69) area, e.g. to **add it back to the navigation structure** (Chapter 2.3.4, page 27).

Convert page to menu item

A menu item for the current page is added back to the navigation structure by calling the **Edit - Convert page to menu item** function. It may need to be moved to the desired spot in the navigation (see **Editing navigation** (Chapter 2.3.3, page 24)).

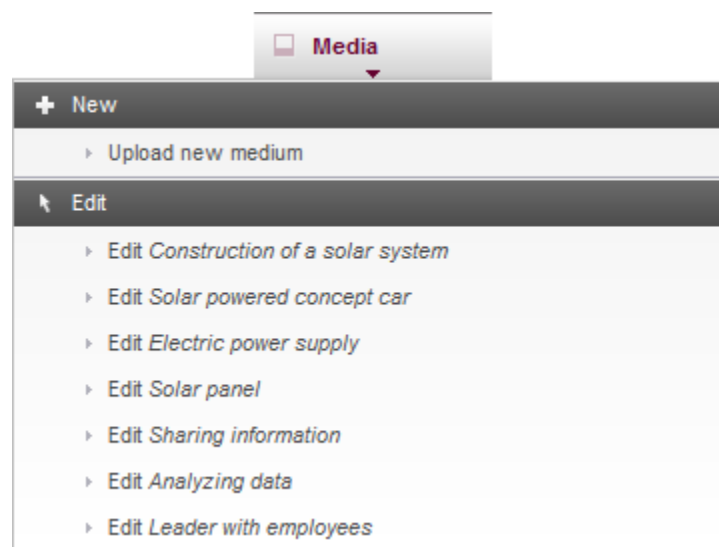


2.4 The media area on the menu bar

The functions available in this area allow new media to be added to the project or existing media to be edited.

New - Upload new medium: New media can be uploaded for use in the project by calling this function. The **Upload medium** (Chapter 2.4.1, page 28) dialog box opens, where all of the necessary information can be specified.

Edit - Edit medium: The images for the current page are listed in this list. If an image is selected, an **Edit dialog** (Chapter 2.4.2, page 32) is opened.



2.4.1 Uploading new media

Calling the **New - Upload new medium** function opens a dialog for adding a new medium to the project. All of the settings necessary for uploading a new medium can be made here.

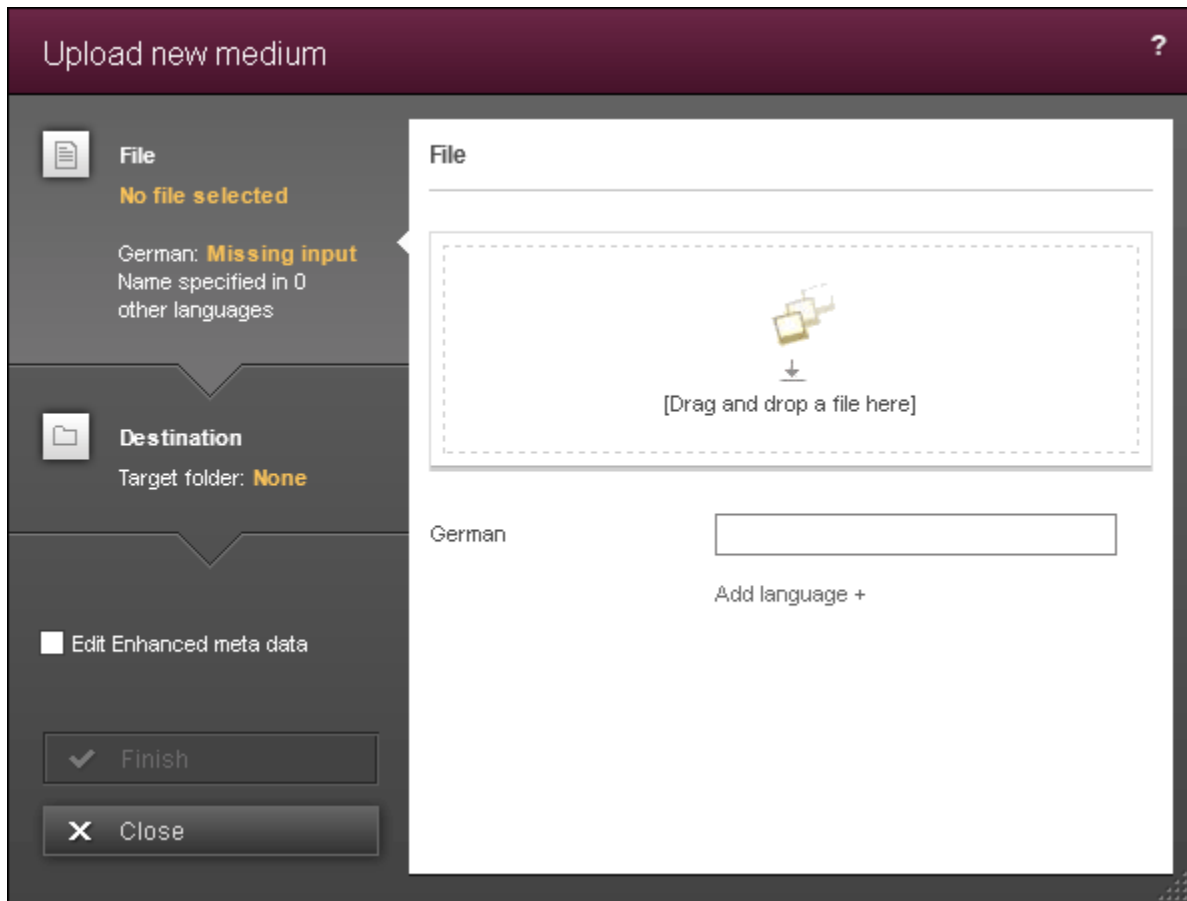
The following areas are located on the left area of the window

- **File** (Chapter 2.4.1, page 29)
- **Destination** (Chapter 2.4.1, page 31) and
- (optionally) a checkbox for editing **metadata** (Chapter 2.4.1, page 31)



Settings that have already been made are shown for each area. In this context, orange-colored text symbolizes that a mandatory setting is missing.

Selecting an area causes the associated setting options to be displayed on the right side of the window.



Uploading a file

This area is used to select the specific media file for upload from the computer's file system and to define a name for further use in the project.

The specified file can be selected in two ways:

- **Clicking on the preview area** opens a window with the workstation computer's file structure. A specific file can be selected for upload to the project in this window. After file selection has been confirmed using OK, a preview of the media file appears in the preview area.



- If supported by the used browser, the specified file can also be selected by **dragging and dropping** it from the file system onto the preview area; a preview of the media file also appears in the preview area this way.

After a file has been selected for uploading from the file system, the file name appears as the name for the master language automatically. This name can be accepted or changed directly. The name specified here is also used for such things as finding the media file in selection dialogs.



A separate name can be specified for each project language. The name for the master language is always used as the preset. Names for other project languages can be edited using the **Add language** button.

It must be noted that, at the very least, a name always has to be specified for the master language.

Multiple files

If supported by the used browser, multiple files can also be uploaded via this dialog using drag and drop.

In this case, only the files that are selected together and are dropped in the corresponding area are ever taken into account; individual files cannot subsequently be added to the existing selection.

If multiple files are uploaded at the same time in this way, the media names that have to be created cannot be specified manually. Instead, they are formed and assigned by the system automatically.



Defining the storage location

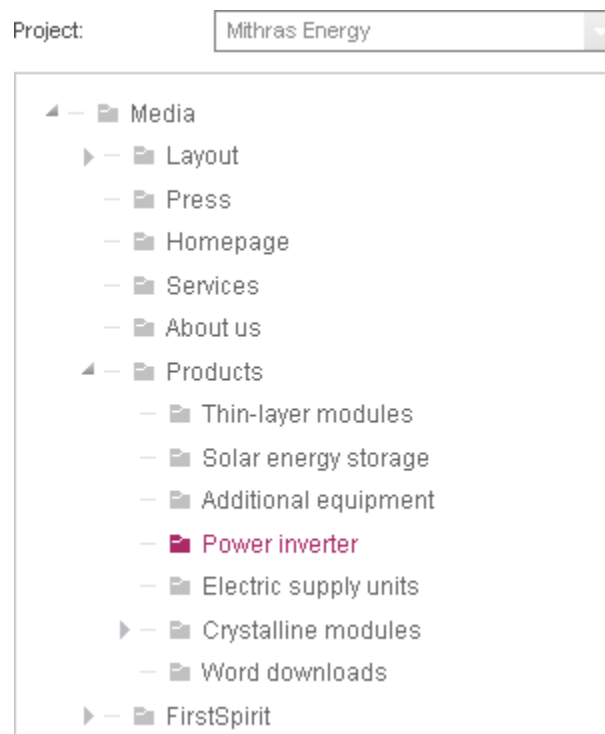
This area is used for allowing the medium to be deposited in a clearly arranged folder structure. This makes finding the medium for later use easier (also refer to the *Selection dialog* page).

The project's folder structure for media is shown on the right side of the window.

▶ : Clicking on the icon arrow pointing to the right shows a lower level in the folder structure.

▲ : Clicking on the icon arrow pointing right down closes the lower level in the folder structure again.

Now a specific folder can be selected as the storage location for the new medium by simply clicking on a folder from this folder structure.



Metadata

If this option is enabled, after clicking on the “Finish” button, another window is opened for **editing metadata** (Chapter 4.2.1.2, page 89) for the medium.



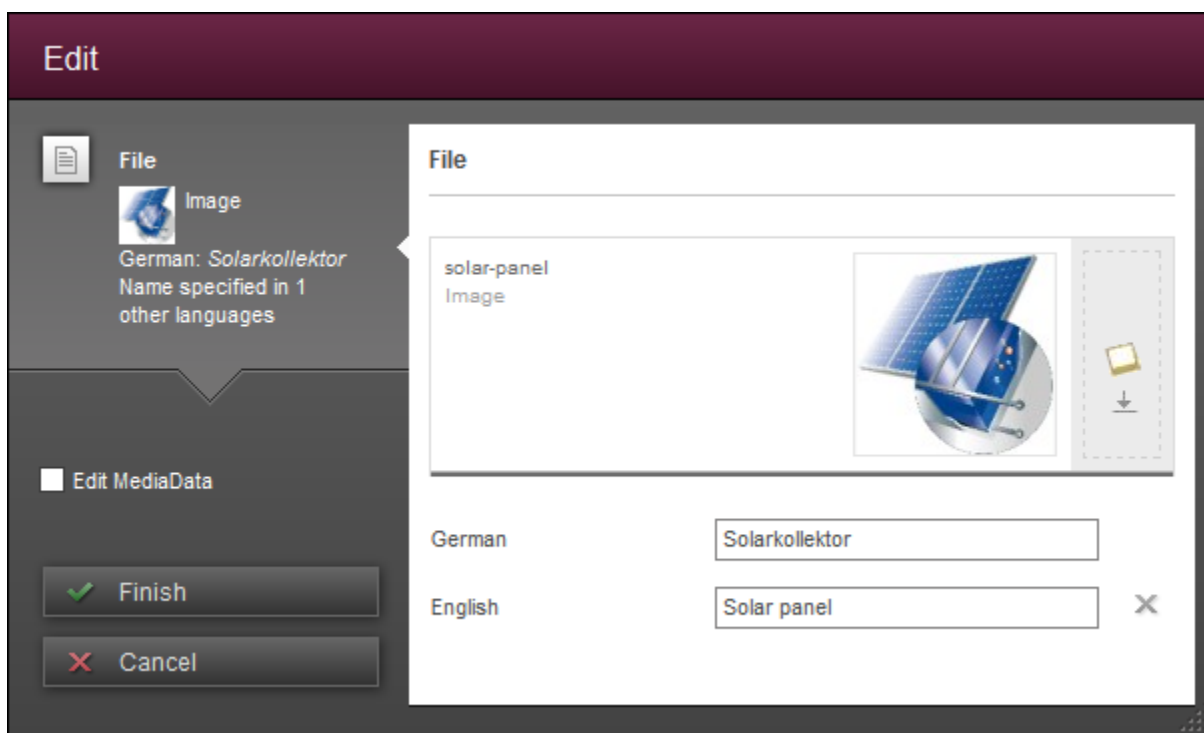
Edit MediaData

Metadata is additional information about an element (page, section, media file, etc.) that can be saved, but which is not necessary for the person viewing the page. This way, for instance, the last changed date for a page or the last editor of a page can be saved.

2.4.2 Editing a medium

All media located on the current preview page are listed under the **Edit** menu item.

Retrieving a specific medium from the list opens a dialog for editing the file. The settings made for a medium can be changed here or the medium can be completely replaced.




! If the medium is already edited by another editor, the current editor gets an information about this fact and a modification is not possible.

The storage location for a medium **cannot** be changed using the “Edit” function.



The **File** area and optionally a checkbox for editing metadata are located on the left side of the window.

All of the settings made for the medium are shown on the right side of the window.

Another editing option for media is available in the **report area** (Chapter 3.2, page 44) via the icon .

File

The selected medium and the initial name from the file system are shown in the preview area. Another medium can be selected for uploading from the computer's file system. There are two ways of selecting a file:

1. Clicking on the preview area opens a window with the workstation computer's file structure. A specific file can be selected for upload to the project in this window. After file selection has been confirmed using OK, a preview of the medium appears in the preview area.
2. If supported by the used browser, the specified file can also be selected by dragging and dropping it from the file system onto the preview area; a preview of the medium also appears in the preview area this way.


The names for the medium in the selected project languages are located below the preview area. The names can be changed here and names for additional project languages can be added or removed.

It must be noted that, at the very least, a name always has to be specified for the master language.



Metadata

If the medium was exchanged or the name modified, metadata can be stored for this medium in the following step if this option is enabled (see [Enter and edit metadata](#) (Chapter 4.2.1.2, page 89)).

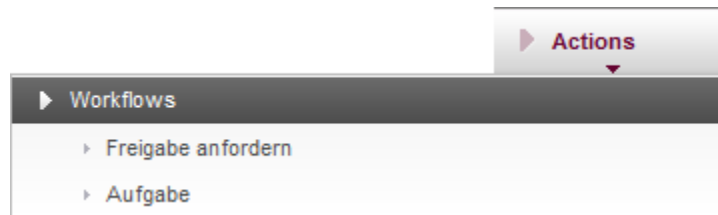
Existing metadata for a medium can be modified or deleted using the icon  in the [Search](#) (Chapter 3.2, page 41).



Metadata is additional information about an element (page, section, media file, etc.) that can be saved, but which is not necessary for the person viewing the page. This way, for instance, the last changed date for a page or the last editor of a page can be saved.

2.5 The actions area on the menu bar

The functions available in this area enable what are known as context-free workflows to be started and project-specific extensions to be called.



Plug-ins

All available plug-ins are shown here.

Scripts

All available scripts are shown here.

The desired script will be executed with one click.

Workflows

All available context-free workflows are shown here.

The desired context-free workflow will be started with one click.

Context-free workflows are not linked to a specific object in the project and therefore are started “without context”, i.e. without a relationship to an object. Also refer to the [Workflows](#) (Chapter 3.4.1, page 50) page.



3 The WebClient report area

The “Reports” represent an important navigation and information option in WebClient. The report area contains a whole series of topic-specific overviews, some of which are familiar from previous versions or from JavaClient, such as the task list, the bookmark function or overviews for search results.

The reports can be opened using a corresponding icon bar on the right edge of the WebClient page. The list of available reports can be expanded based on projects (see the **Project-specific reports** (Chapter 3, page 38) section). Therefore, it can deviate from the standard reports listed here. If an icon for a Project-specific report is deactivated this can point out to the fact that the number of licensed application integrations has been exceeded.

In most cases, one entry for a standard report represents one object from FirstSpirit (e.g. page, medium, data record). Depending on the object type and the particular specifications of the project developer, the following information is basically shown for each object:

- **Object name** In the object type color
(blue = page, yellow = media file, brown = data record)
- **Object type icon** with **workflow status** (Chapter 3.4, page 48)
(📄 = page, 🖼️ = image, 📁 = file, 🗃️ = data record, ▶️ = in workflow, 📁 = folder)
- **Preview image**, if possible
- **Information** for identifying the object better
- The entry is **marked in color** if the respective object is located on the current preview page or it is the current preview page.
- Hovering the mouse pointer over an entry displays additional information or an enlarged preview image in a **drop-down menu** on the left.
- **Clicking** on an entry brings the user directly to the respective object in the preview.

Initially, the number of entries displayed will correspond to the number that fit in the report area. If there are more entries, they can be reached by scrolling down.

Depending on the type, entries can be dragged from the report area to the current preview page (**drag & drop**), e.g. media to areas where media can be used. In the case of media a **dialog for editing the medium** (Chapter 2.4.2, page 32) will open with one click.



The report area normally remains open until it is closed. If another preview page is selected, the respective information for the new page is displayed.

The reports can be **closed** by

- clicking on the same report icon again
- clicking on another report icon.

Another report can be opened by clicking on the icon for another report.



Standard reports

The following functions are available by default in the report area:

- **Help**
This menu item provides you with some forms of help: the complete HTML help, explanations about recently used client functions and the Guided Tour.
[More...](#) (Chapter 3.1, page 40)
- **Search**



Calling this function opens a search window for full-text searches within the project.

[More...](#) (Chapter 3.2, page 41)

- **Bookmark**

Frequently used objects can be saved with the help of bookmarks. All of the bookmarks can be viewed using the corresponding report on the right side; the linked objects can be reached with the click of a button.

[More...](#) (Chapter 3.3, page 45)

- **Tasks**

Tasks issued in the project are managed in this area.

[More...](#) (Chapter 3.4, page 48)

- **History**

The page history summarizes the changes on the current page; the project history lists the changes to the project.

[More...](#) (Chapter 3.5, page 63)

- **Related elements**

Neighboring and linked elements are displayed in this area.

[More...](#) (Chapter 3.6, page 69)

- **Notifications**

Events that may be of interest to the editor can be reported automatically in this area. The basis for these notifications comes from events at objects where the editor has placed a bookmark, where a workflow was started or where one was advanced and where the editor has the corresponding permissions in the workflow.

[More...](#) (Chapter 3.7, page 72)

- **My changes**

In this area, reminders for the editor are listed (within a limited time period) to carry out actions such as requesting release for changes.

[More...](#) (Chapter 3.8, page 73)

- **Logout**

The current WebClient session is ended by calling this function.

Project-specific reports


In addition to the standard reports mentioned above, the project-specific expandability of WebClient also allows the incorporation of **project-specific reports** with their own display

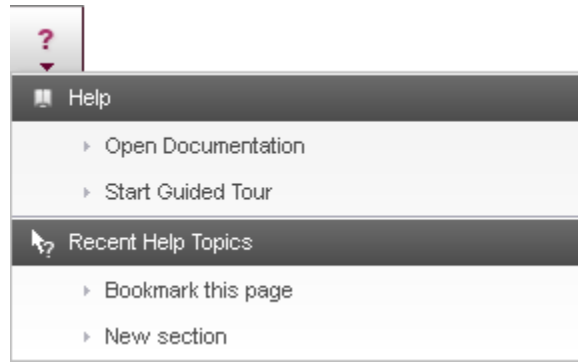


logic to, for instance, display data from external systems such as product databases (online shop), web and SEO analysis tools, etc.



3.1 Help function

 Use this icon to open the WebClient online help.



Open Documentation

Use this entry to open the WebClient online help (HTML).

Start Guided Tour

Use this entry to start the Guided Tour.

It will be displayed directly in the WebClient and gives you an overview of the major features of the WebClient in several steps. You can stop the tour at any time.

Recent Help Topics


Help topics for recently used functions will be listed. Click to open online documentation especially for the selected topic.



3.2 Search function in the report area

Using this function, it is possible to search through all of the content in a project based on a specific piece of text. This does not relate just to the text entries on preview pages; it also relates to the names of embedded media, associated comment lines, the content of media objects (such as PDF documents) and the like.

Search field

A term to be searched for throughout the project can be entered using the search field. The search is started using the  icon next to the search field or using .

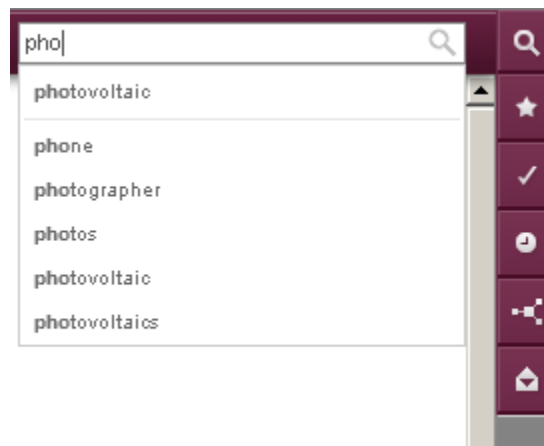
A full-text search that does not discriminate based on upper and lower case has been implemented. This means that search terms can be entered in upper or lower case. If multiple search terms are entered, the terms being searched for are considered to be linked with AND statements. At the same time, it is important to note that hyphens (“-”) cannot be used due to the search technology that has been implemented. Instead, the words connected by a hyphen should be entered separately, for example “solar generated” or even “solar gen” instead of “solar-generated”.

Both object names and content (e.g. from pages or data records) are searched in the process. When dealing with media, other descriptive text that has been stored in JavaClient for the medium is searched as well.

The search begins starting when the first character is entered and begins by showing the most recent searches by the currently logged-in user in this browser directly below the search field. Below that, terms that start with the entered characters and are present in the project are displayed (“autocomplete”). Clicking on a suggestion applies the term to the search and displays the corresponding search hits in the result list.

The search hits are displayed in a [list of results](#) (Chapter 3.2, page 43).





Search with suggestions

Search options

The search result can be restricted with the help of search options. These restrictions can be object-based, chronological or user-based. The currently active filter is shown.

Object type: The type of objects that is to be searched for can be limited using this drop-down box.

It is initially restricted by whether

- Content or
- Media

is to be taken into account during the search.

You can select a specific object type by clicking on it.


If “Content” was selected, the next step (▶ icon) determines which of the following is to be taken into account:

- Standard pages (see the [Create new page](#) (Chapter 2.3.1, page 18)) page or
- Pages with reusable content (see the [The FirstSpirit operating concept](#) (Chapter 4.1, page 76) page)



If “Media” was selected, the next step (▶ icon) determines which of the following is to be taken into account:

- Images or
- Files

A previously made selection can be removed by using the  icon or selecting the “(All elements)” entry.

All object types are enabled in the default setting.


Change period: The following filters can be selected from the drop-down list for the time limit:

- *Changed, last week:* Elements that were created or modified within the last week are displayed
- *Changed, last month:* Elements that were created or modified within the last month are displayed
- *(No time filter):* All of the elements that match the search criteria are displayed. This is the default setting. Both of the *Changed, last week* and *Changed, last month* filters can also be reset by using this entry.

User: The search result can be limited to elements that have been created or modified by the currently logged-in user by activating the *My elements* option. Clicking on this option again disables it.



List of results

The number of found elements is output above the list of results. If no results are found, the text “-no results-” is displayed. The results are each displayed with the respective object type icon, name and descriptive text. Clicking on a result changes the view in the WebClient preview to the page with the sought text. The hit or hits are highlighted in color in the preview. The current page has highlighted background in the list of results.

According to the project configuration, the icon  can be used for storing, modifying or deleting metadata. The [dialog for editing metadata](#) (Chapter 4.2.1, page 86) will open.



In the case of **media** additional icons are available for

- **Editing** (Chapter 2.4.2, page 32) (icon ) and
- **Downloading** (icon )

the selected medium.

The preview which opens when hovering the mouse pointer over this medium shows the file name (see page **Uploading new media** (Chapter 2.4.1, page 28)) including the file extension and the size of the medium. For images, the pixel information of the original resolution is used for the indication of size. Enlarge the preview of an image by clicking on it. It will be displayed in its original size. Click again to minimize the preview.

Also refer to the **Report area** (Chapter 3, page 36) page.

! Search results remain intact until a new search is triggered or WebClient is closed, even if the report is closed or another one is opened.



3.3 Bookmarks in the report area

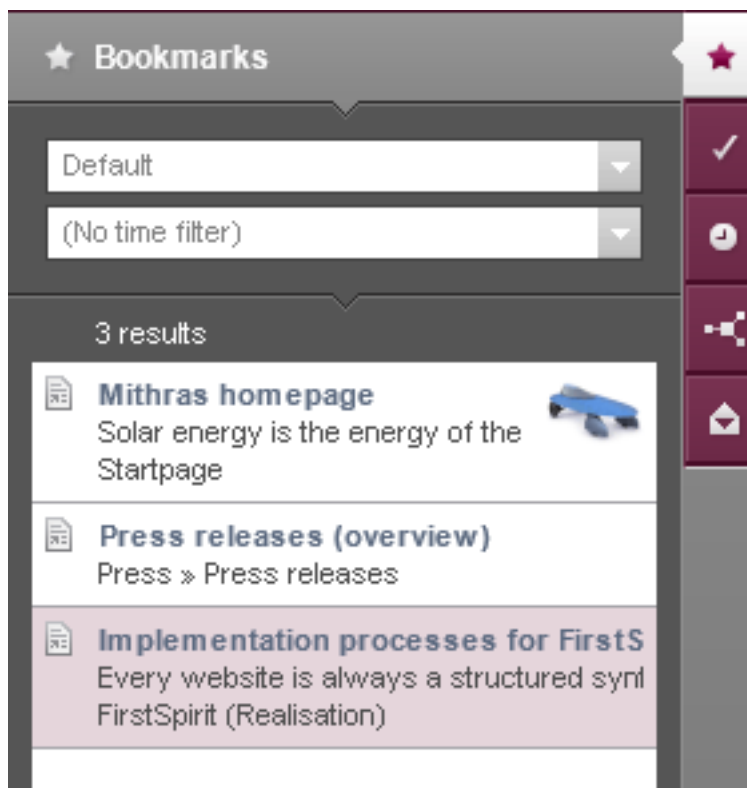
Pages recorded in the list of personal bookmarks using the **Add bookmark** (Chapter 2.2, page 16) menu function are listed here. Bookmarks created in WebClient are also available in JavaClient and vice versa.

The bookmarks are displayed in the order they were created, with the name of the page, a descriptive text and a preview image. Another enlarged preview image is also displayed in a drop-down menu left of the entry that opens after a short time if you hover the mouse pointer over an entry.

If the page is based on a data record, a  object icon is displayed, otherwise there is a  icon.

Clicking on an entry brings you to the respective object.

The current page has a colored background in the list.



Bookmarks in the report area



Bookmark groups

The bookmarks can be created in user defined groups. The group can be selected using the selection list. All bookmarks of this group then will be displayed in the report area. The group “Default” is pre-selected.

Filtering

Pages marked with bookmarks can be filtered based on the following criteria:

- *Changed, last week*: Only pages that were created or modified within the last week are displayed
- *Changed, last month*: Only pages that were created or modified within the last month are displayed
- *(No time filter)*: All of the pages are displayed. This is the standard setting. Both of the *Changed, last week* and *Changed, last month* filters can also be reset by using this entry.

Functions

The following icons will appear after hovering the mouse pointer over the entry for a short time if the respective function is available.



Use this icon to mark bookmarks as master copies.

Master copies can be used for creating new objects ([pages](#) (Chapter 2.3.1, page 21), [sections](#) (Chapter 4.3, page 106) or [data records](#) (Chapter 2.3.2, page 23)). With this help you can create copies of FirstSpirit objects you need often, very quick.



Use this icon to create a copy of the object which is bookmarked.

If the bookmarked object is a page, for example, the dialog for [inserting new pages](#) (Chapter 2.3.1, page 18) will open.




Existing marks of bookmarks as master copies can be removed by clicking on this icon. If a bookmark is not marked as a master copy, the icon is not visible.



Existing bookmarks can be deleted from the list by clicking on this icon.




3.4 Tasks

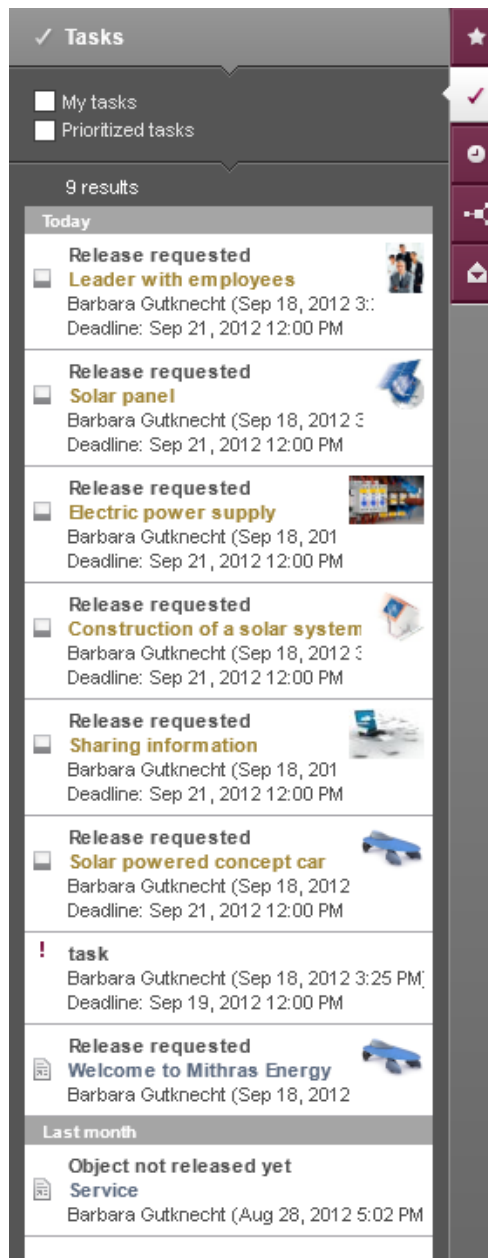
Available tasks for a respective user can be reached using the  icon.

Tasks are part of **workflows** (Chapter 3.4.1, page 50); in this context, an individual task could be a work step in the editorial process, for instance.

The following information is displayed in the report area (categorized by the time of the last work step):

- **Workflow step/task:** The current step of the workflow is in the first row, e.g. “Release requested”, “Object not released”.
- **! Prioritization** (optional): If a high or very high priority has been placed on this workflow, it is visualized by this icon.
- **Object name, icon and preview image:** The object name, object type icon and, if applicable, a preview image are shown here. In cases of  data records, the name of the data source and a text excerpt (e.g. “Connector”) or the ID (e.g. “#2050”) for the associated data record is displayed.
- **Last edited by and time:** The last editor is shown here, i.e. the user that completed the workflow's previous work step. The time of the edit is in parentheses.
- **Deadline** (optional): If a deadline for when the entire workflow has to have been completed has been specified, it is shown in the bottom row with the date and time.





Tasks in the report area

- ▶
Actions (optional): If the workflow was started using the **Actions area** (Chapter 2.5, page 35), this icon is shown at the upper right edge of an entry. Clicking on it opens a drop-down field where the next work step can be reached: ▶ check release. Clicking on an entry in the drop-down field opens a dialog with the information for the next work step.



If the workflow has been started on an object, clicking on an entry goes directly to the associated object that the displayed work step applies to.

Additional information about the respective entry can be obtained using a drop-down menu that appears after the mouse pointer is hovered over an entry.

Filter

My tasks: If this check box is enabled, all of the tasks are displayed for which the current user has been selected as the editor directly or a group the user belongs to has been selected as the editor.

Prioritized tasks: If this check box is enabled, the tasks are shown sorted by priority.

Both filters can be combined with each other.

3.4.1 Workflows

Workflows can be carried out

- for one or more **objects on the respective page** (using the **Page status** (Chapter 2.1, page 9), “linked to context”), e.g. to release the object(s),
- or in general and **independent of an object** (using the **Actions area** (Chapter 2.5, page 35), “free of context”), e.g. to ask another project user a question.

In this context, a workflow is always a sequence of tasks or work steps that have to be worked on in a specific, fixed order. In the process, each work step can be assigned to a responsible user or a group of users. The workflow regulates the logical sequence of individual tasks during this, so that only the respective applicable step can be carried out. If a work step is completed by a user, the user that is responsible for the next step is informed. Furthermore, priorities and due dates can be specified using the workflow.

Using workflows is helpful for companies where various tasks regarding website design are administered by different departments and content is not centrally maintained.

Examples

In cases of workflows **linked to context**, objects such as a page or media are transferred from a start state (e.g. “The page has been changed.”) to an end state (e.g. “The modified



page has been reviewed and released.”). (Also refer to the [Release](#) (Chapter 3.4.2, page 54) workflow.)

In cases of workflows **free of context**, tasks or work steps can be worked on in a specific order independent of a selected object. This way, for example, a question can be asked using the software that another project user should answer within a specific time period.

Excursus: Significance of releases

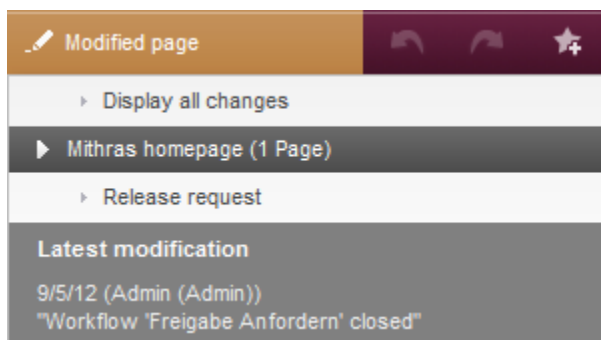
Changes recently made to an object also usually only become visible the next time the site is published if the object is in the “released” status. If a page has not been released, the most recent changes are not visible when it is published.

Where can workflows be started?

Workflows can be started using the [Page status](#) (Chapter 2.1, page 9), in particular by using the entries in the drop-down menu such as “Request release”. If no entries are present, this could be due to the fact that no workflow is available or the user does not have the necessary permissions.

By default, a workflow always relates to the **page** where it was started and, in particular, to the content that has been entered into sections or pages.

Special project extensions are necessary for the page's **media**. See also page [Release](#) (Chapter 3.4.2, page 61).



Drop-down menu with multiple workflows

Which workflows can be carried out?

Initially, multiple workflows can be available in the page status on a page. Normally, once a workflow has been started, only the steps of that workflow can still be carried out. However,



work steps for other workflows that were available on the page before are no longer available after a workflow has been started.

If a project extension like “Example” is used, however, multiple work steps/tasks can be available using the page status but only ever from **one** workflow.

What work steps are there?

The type, number and order of individual work steps and the respective necessary editor depend on the design of the workflow used by the project developer. The work steps of the “Release” workflow supplied as standard are presented on the [Release](#) (Chapter 3.4.2, page 54) page as examples.

If a workflow was started on a page, the status “In workflow” is displayed and the available work steps are shown in the drop-down menu.

In principle, each work step can be assigned to one or more editors or one or more user groups. If a work step 1 has been carried out (for example: the editor in chief reviewed content changes to a page made by an editor), the editor advances the object or workflow to the next work step 2 via a dialog. Like in a flowchart, different activities can be selected using the dialog depending on the decision and the workflow can take another course depending on the decision.

Work step 2 is processed by another user and can then be advanced and so forth until all of the specified work steps have been completed and the final state has been reached.

Depending on the workflow, an object in a workflow can be **write-protected**. This way, it is protected from changes from other users in the meantime. Only the next work step can be carried out on such an object; editing the page or a section is not possible.



Page “in workflow”– write-protected



Action window

If a work step is selected from the drop-down menu, an action window opens with information about how the work step is to be carried out.

The following settings can be made here:

Next editor:

- The user or users (👤 icon) or
- The user group or user groups (👥 icon)

that have been specified for the next work step by the project developer are shown here.

Which user or group is to be informed about processing the next step can be selected using the selection field. The desired user name can be entered in the selection field to do this. The available users or groups are then shown and the desired user can be selected with a click.

Manually selected users and groups are then shown below the selection field this way. The manual selection can be removed again by clicking the ✕ icon.

Priority: Which priority this workflow is to receive during processing is configured here. The priority configured here is shown to subsequent editors in the corresponding action window. Furthermore, [tasks in the report area](#) (Chapter 3.4, page 50) can be filtered by priority.

Deadline: A deadline can be specified here for when the entire workflow has to be completed. The deadline configured here is shown to subsequent editors in the corresponding action window. Furthermore, the deadline is shown in the [report area for tasks](#) (Chapter 3.4, page 48).

Comment: A more in-depth description of the task can be stored in this field for subsequent editors. This comment is shown to the subsequent editor in a corresponding action window and is applied to the version history of the object.

Form: Depending on the project developer's specifications, a form for specifying additional information can be available.

Action buttons: A button available on the bottom left has to be pressed to complete the work step and continue on to the next.



The current work step can also require or enable a decision. In this case, there is more than one button. The future course of the workflow can also change depending on which button is selected.

In addition, there is also a **Cancel** button for opting not to perform any of the actions displayed and to retain the current state.

Information about workflows and tasks in a project

- The **Page status** (Chapter 2.1, page 12) shows whether and which work step a page or medium or data record for a page is currently in.
- The report area under Tasks indicates whether and which tasks (i.e. work steps pending for immediate processing) are pending for processing for the currently logged-in user. In addition, the next required user or users are normally sent an e-mail once a preceding work step has been completed.

Standard workflows

A workflow included with FirstSpirit by default is described on the **following page** (Chapter 3.4.2, page 54). However, other workflows can be present in each project; they may have more or fewer work steps or other goals or effects.

3.4.2 The standard “Release” workflow

The “Release” workflow is used, for instance, for controlling how new content or changes to existing content, design or navigation are published on the website.

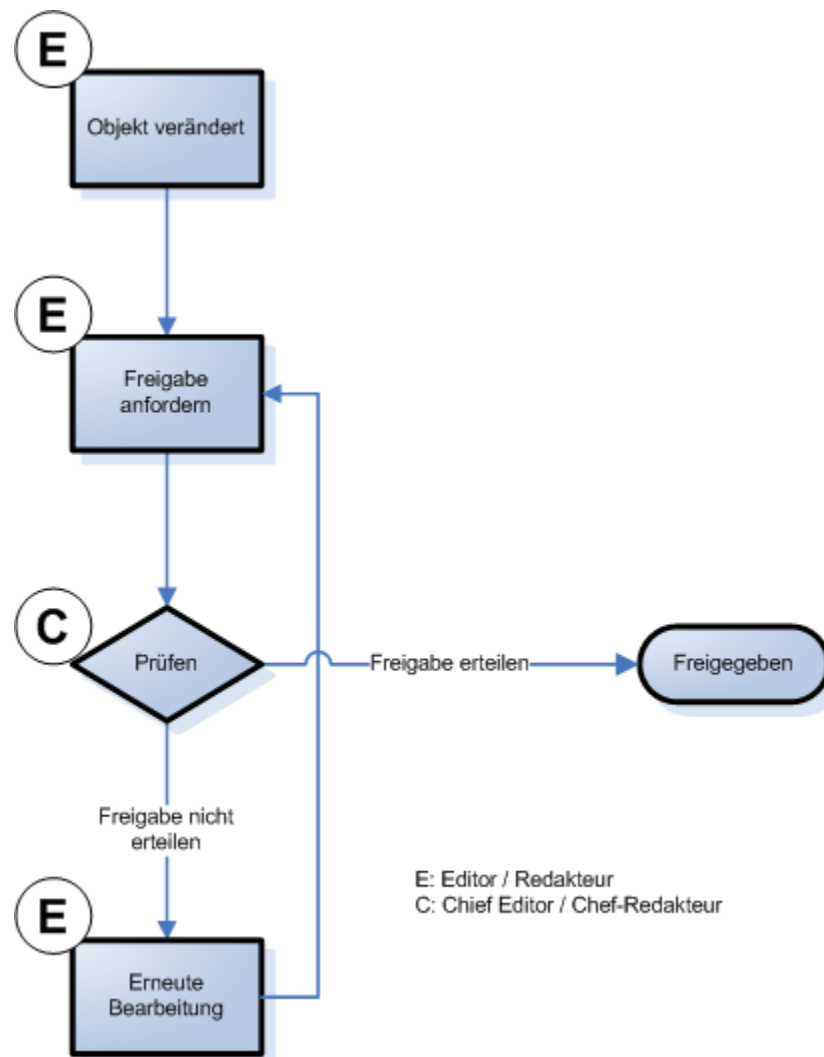
Newly configured or modified content is frequently reviewed based on the “four-eye principle” for this. Changes then have to be “released” by a responsible party before publication and thus can be subjected to multi-level quality control. In the world of FirstSpirit, this case is also a **release** project.

The sequence of work steps and associated tasks is as follows:

- Initial situation: **The page was changed** (Chapter 3.4.2, page 56)
- Step 1: **Requesting release** (Chapter 3.4.2, page 56)
- Step 2: **Checking release** (Chapter 3.4.2, page 58)
- Step 3: **Renewed editing** (Chapter 3.4.2, page 60) or release



- If necessary, repetition of steps 1 to 3
- Goal: **The page is released** (Chapter 3.4.2, page 61)



Excursus: Significance of releases

Changes recently made to an object also usually only become visible the next time the site is published if the object is in the “released” status. If a page has not been released, the most recent changes are not visible when it is published.

Initial situation: The page was changed

If a project is working with releases, it is also important that modified content is transferred to the “released” state so that changes also become visible during the next publication.

By default, WebClient shows the editor that a page has to be released using the “Modified page” page status. This is done if

1. Sections of a page are edited, created from scratch, deleted or moved
([Editing a section](#) (Chapter 4.3, page 105))
2. A new page has been created
([New - Create new page](#) (Chapter 2.3, page 17) or [Copy - Create a copy of page](#) (Chapter 2.3, page 17))
3. Content on the page has been edited
([Editing a page](#) (Chapter 4.1, page 80))
4. A page has been moved or renamed
([Editing navigation](#) (Chapter 2.3.3, page 24))
5. A page has been converted into a menu item or a menu item has been converted into a page
([Converting a page](#) (Chapter 2.3.4, page 26))

Step 1: Requesting release

If changes have been made to a page or a section, the status “Modified page” is displayed (also refer to [Page status](#) (Chapter 2.1, page 9)).

(Note: The page status does not change if a medium on the page has been changed. Also refer to page [Release](#) (Chapter 3.4.2, page 61)).

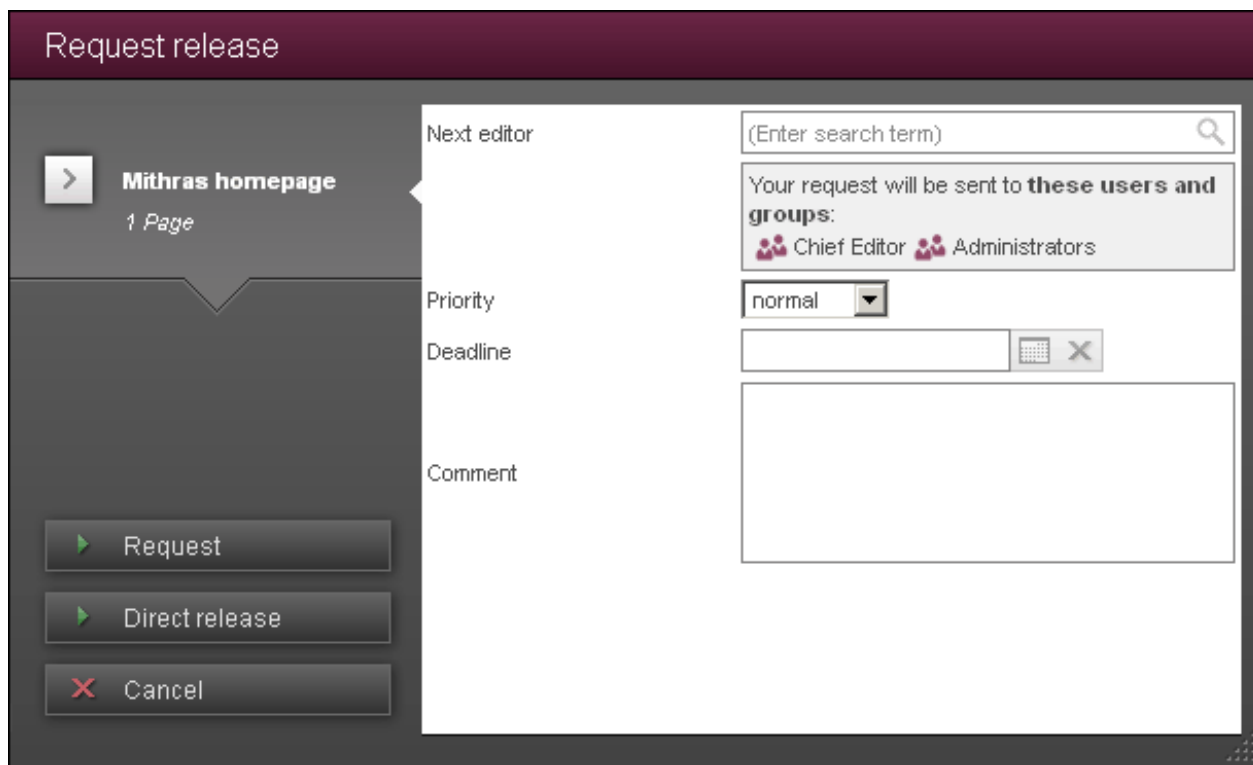
A workflow can be started using the drop-down menu. In this case, the entry “Request release” has to be clicked to do so.

The following action window opens:

“Request release” action window

Various settings can be made or read in this action window:





“Request release” dialog

Next editor:

- The user or users (👤 icon) or
- The user group or user groups (👥 icon)

that have been specified for the next work step by the project developer are shown here.

Which user or group is to be informed about processing the next step can be selected using the selection field. The desired user name can be entered in the selection field to do this. The available users or groups are then shown and the desired user can be selected with a click.

Priority: Which priority this workflow is to receive during processing is configured here. The priority configured here is shown to subsequent editors in the corresponding action window. Furthermore, *tasks in the report area* (Chapter 3.4, page 50) can be filtered by priority.

Action buttons: Depending on permissions, the buttons “Request” and “Direct release” are available in this status.



Request: Release is requested for this object by clicking on the button. The responsible editor receives an e-mail message that the object should be reviewed and a link to the object in JavaClient. A corresponding notification is output on the preview page in WebClient (also refer to **Page status** (Chapter 2.1, page 9) and **Notifications** (Chapter 3.7, page 72) regarding this) and the task is taken up in the **Task area** (Chapter 3.4, page 48) (or in the task list in JavaClient). Furthermore, the object is set to write-protected so that changes to the content are no longer possible.

Direct release: The object is directly released by clicking on this button. A corresponding notification is output on the preview page (also refer to **Page status** (Chapter 2.1, page 9) and **Notifications** (Chapter 3.7, page 72)).

Step 2: Checking release

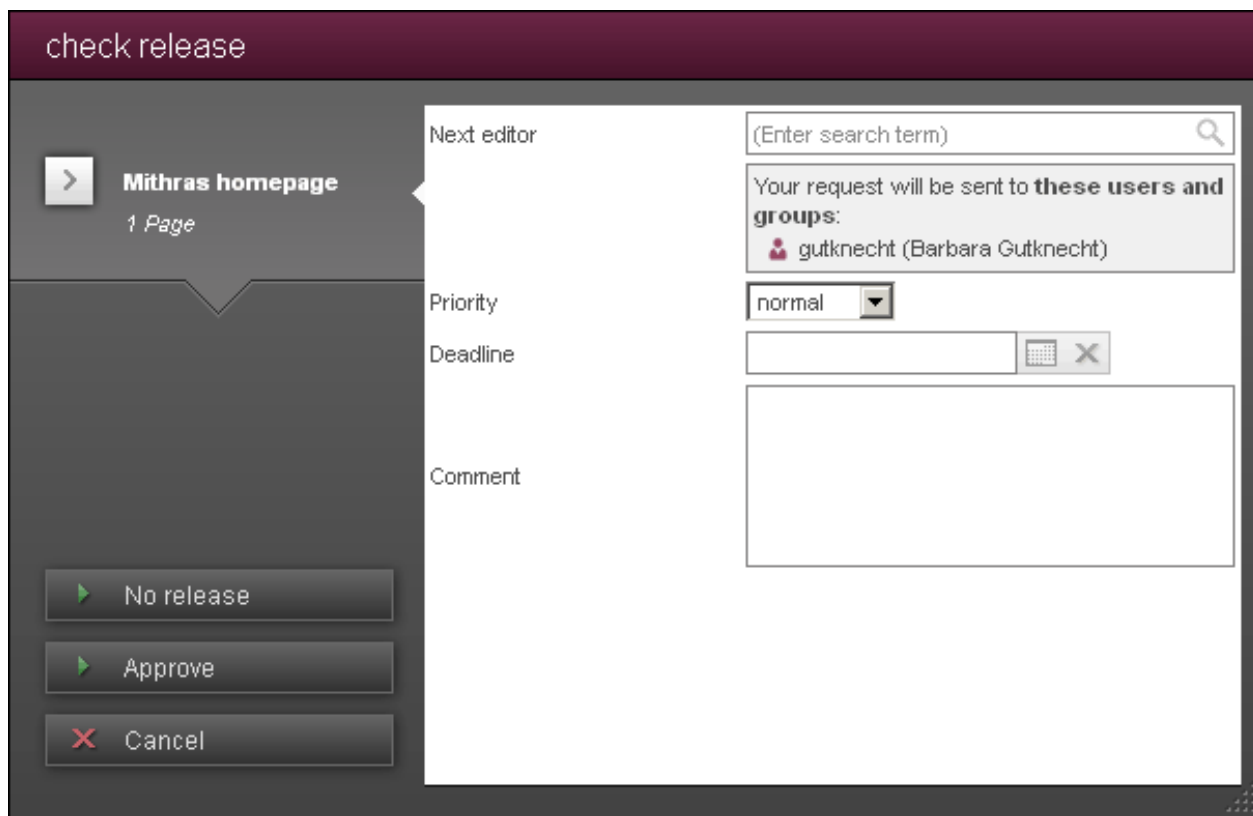
If the **Request** button was pressed, the object is advanced to the next status in the workflow. The status of the object is now “In workflow” (see **Page status** (Chapter 2.1, page 12)). It can no longer be edited since the workflow specifies that objects in this status are write-protected.

Not just the status changes, but the available actions do as well: Only the **Check release** action is available in this status. Clicking on this entry opens the following action window:

“Check release” action window

Once again, various settings can be made or read in this action window.





“Release” workflow, step 2

Next editor:

- The user or users (👤 icon) or
- The user group or user groups (👥 icon)

that have been specified for the next work step by the project developer are shown here.

Which user or group is to be informed about processing the next step can be selected using the selection field. The desired user name can be entered in the selection field to do this. The available users or groups are then shown and the desired user can be selected with a click.

Priority: Which priority this workflow is to receive during processing is configured here. The priority configured here is shown to subsequent editors in the corresponding action window. Furthermore, **tasks in the report area** (Chapter 3.4, page 50) can be filtered by priority.

Action buttons: The buttons “Approve” and “No release” are available in this status.



Approve: Clicking this button releases the object. The editor that started the workflow receives an e-mail message that the object was released together with a link to the object in JavaClient. A corresponding notification is output on the preview page in WebClient (also refer to **Page status** (Chapter 2.1, page 9) and **Notifications** (Chapter 3.7, page 72) regarding this). This completes the workflow and the object can now be edited once again. The status at this point is “Released page”.

No release: Clicking this button removes the write protection for the object. The user that requested the release receives an e-mail message that release was not approved. The status at this point is “Modified page”.

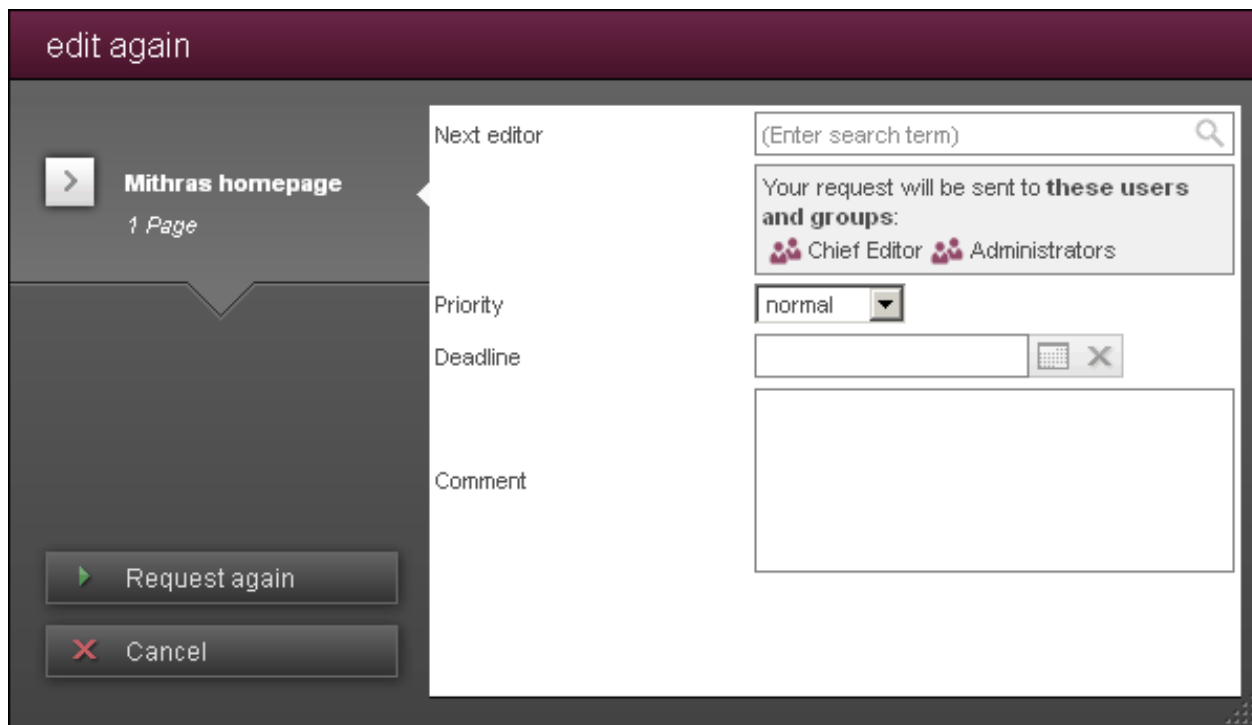
Step 3: Renewed editing

The object now has to be edited once again. The next work step is selected from the drop-down menu for this: “Renewed editing”.

The following action window opens:

“Edit again” action window

Once again, various settings can be made or read in this action window.



“Edit again” dialog



Next editor:

- The user or users (👤 icon) or
- The user group or user groups (👥 icon)

that have been specified for the next work step by the project developer are shown here.

Which user or group is to be informed about processing the next step can be selected using the selection field. The desired user name can be entered in the selection field to do this. The available users or groups are then shown and the desired user can be selected with a click.

Priority: Which priority this workflow is to receive during processing is configured here. The priority configured here is shown to subsequent editors in the corresponding action window. Furthermore, [tasks in the report area](#) (Chapter 3.4, page 50) can be filtered by priority.

Action buttons: Only the “Request again” button is available in this status.

Request again: Clicking on this button returns the user to [step 1](#) (Chapter 3.4.2, page 56).

Goal: The page is released

If the [Direct release](#) (Chapter 3.4.2, page 56) or [Approve](#) (Chapter 3.4.2, page 59) action has been carried out, the page's status changes to “Released page”.

Thus, changes made before this step can be taken into account during the next publication.

The “Example” workflow

By default only pages and data records can be released using workflows in WebClient at first.

A special workflow is required for releasing modified media in WebClient. By default, a corresponding workflow is contained in FirstSpirit's scope of delivery (“Example”). This has to be enabled for the respective project by the project administrator (see the *Workflows* page in *FirstSpirit 5.0 Online Documentation* in the chapter for WebClient administrators).

If this workflow is enabled, the functions deviate slightly from those of the standard [Release](#) (Chapter 3.4.2, page 54) workflow: In contrast to the “Release” workflow, the “Example” workflow can be used to release

1. A **page** including embedded **media**,



2. Only the **page** or

3. Only the **media**

Each of these three combinations refer to a(n object) **group**.


If just release for the page without media has been requested to start with or the page is in a workflow, a release for the media can still be requested as well. This is despite the fact the workflow for the page has not yet been completed. Therefore, there may be multiple work step entries in the **page status** (Chapter 2.1, page 9) even though a workflow has already been started. This is **not** possible when using the standard release workflow.



3.5 The project history

The project and page history can be reached using the  icon.

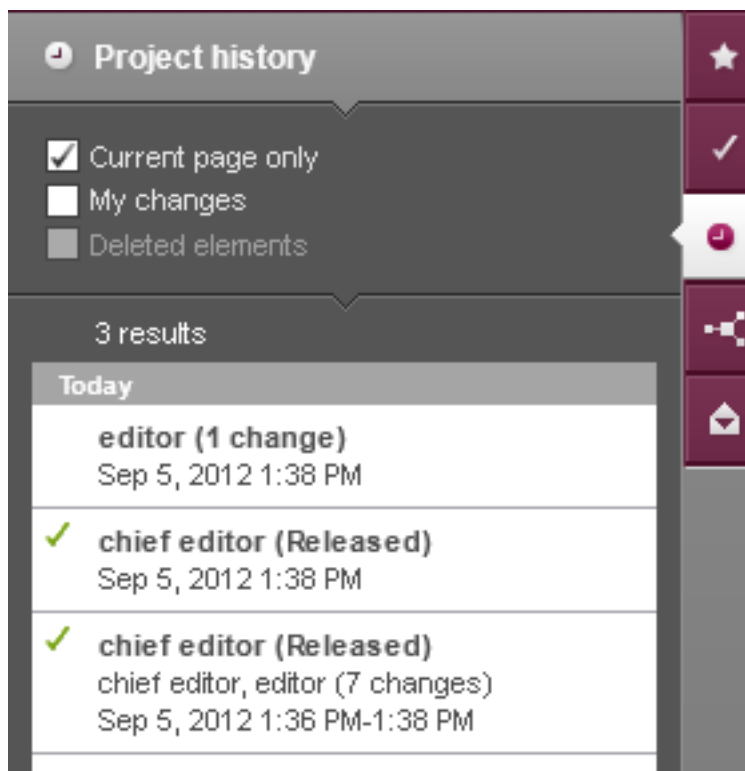
By default, changes that have been made to the current preview page are listed based on change period here (**page history**) and with the following information:

- User that made the change,
- Number of changes and
- Point or span of time for the changes
- Releases in a page's version history are marked with a  icon and (Released) added to the end.

All of the changes by one user within one day are combined into one modification entry in the process. Likewise, changes by one user that have been made through to release in one day are combined into one entry. Thus, multiple entries for one user from one day can be present if the user approved releases in the meantime.

This provides an easy answer to the question What did Editor A modify in the time from X to Y?





Page history in the report area

In order to display the **project history** (Chapter 3.5, page 67), the “Current page only” filter has to be disabled.

Viewing an older version of a page

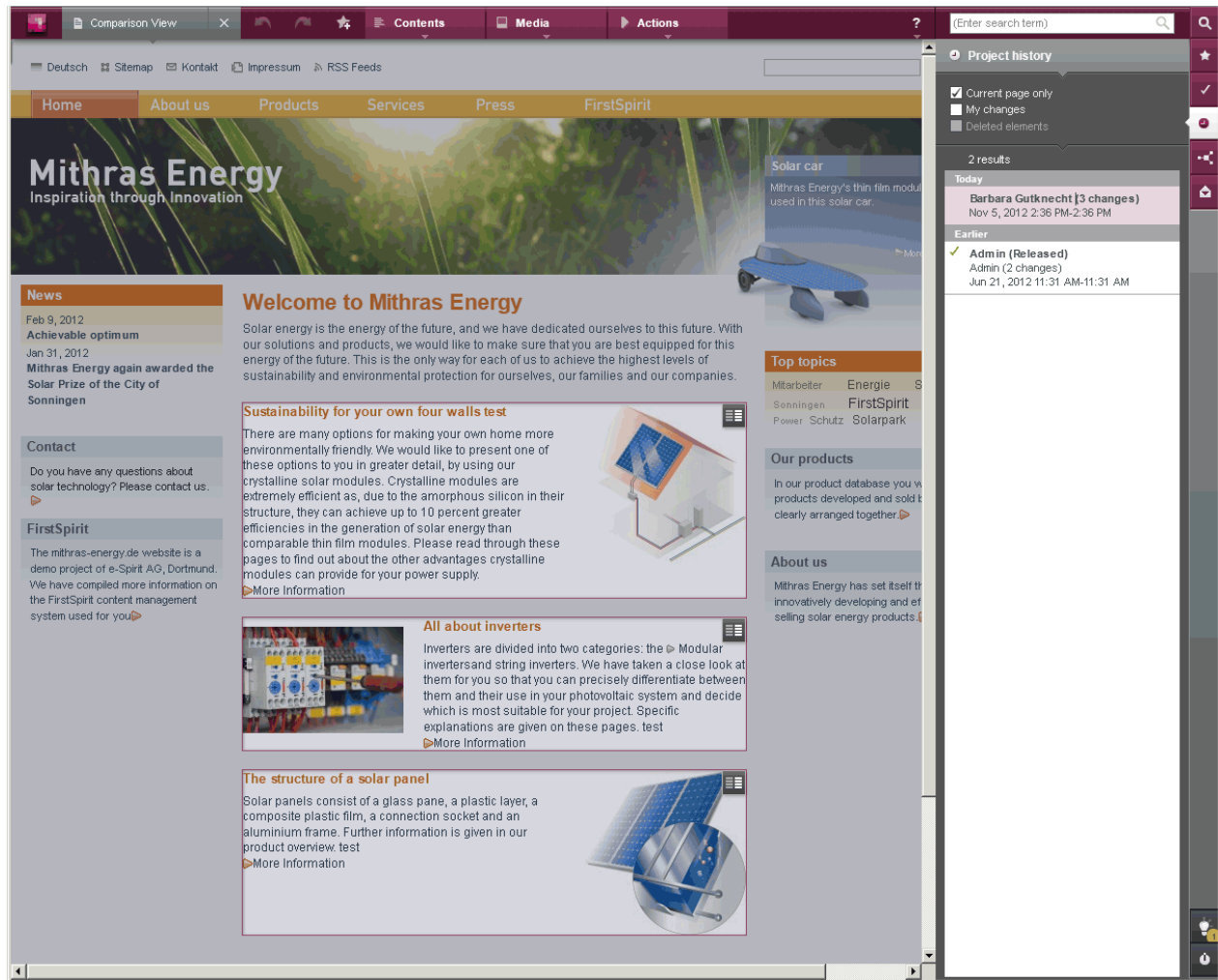
Each of the entries can be clicked. The respective currently active entry is highlighted.

After selecting an entry, the current page is displayed as a “historic version ” (also refer to the **Page status** (Chapter 2.1, page 13) page), specifically the version where the last change to the selected entry was carried out.

Make changes visible


Using the “Display all changes” entry from the **page status**, areas that the editor modified in the specified time span can be visualized using highlighting and framing.





Modified areas of the current preview page

Comparing versions

For each of the displayed, modified areas (page, section or data record form), a difference display can be opened as well using the  icon (see figure). Modifications the editor made to content within the specified time span are compared to each other in this display. The difference display is limited to significant changes, it represents values in a simplified manner and without input elements.

Areas that have been newly added or released and have not yet been modified do not have this icon.

The following are shown in the difference display:



- In the left area (**historic version – Old**)
The older version
- In the right area (**current version– New**)
The newer version

The **upper area** displays the following information:

- Number of revisions between the two selected versions
- Date and time of the selected revision
- Language of the object; this can be changed using the language switch function on the upper right
- Note for whether the section is displayed in the language

In the **main area** below that, all of the area's input elements for both versions in which changes have been made are displayed. In the process, the title of the respective input form is displayed in the upper left.

If a difference between the two revisions can be visualized, it is represented **in color**:

- Deleted content: Marked in red and crossed out
- Added content: Marked in green

In addition, a vertical line in the respective color is shown for each change.



Show modifications

Sustainability for your own four walls | 15 modifications English

✓ **Release State** Older 09.11.11 16:29

Paragraph

There are ~~many~~ options for making your own home more environmentally friendly. We would like to present one of these options to you in greater detail, by using our crystalline solar modules. Crystalline modules are extremely efficient as, due to the amorphous silicon in their structure, they can achieve up to 10 percent greater efficiencies in the generation of solar energy than comparable thin film modules. Please read through these pages to find out about the other advantages crystalline modules can provide for your power supply.

Link

Crystalline modules

Picture

Construction of a solar system

Restore this version

! **Current State** Newer 14.06.12 07:49

Paragraph

New text. There are a few options for making your own home more environmentally friendly. We would like to present one of these options to you in greater detail, by using our crystalline solar modules. Crystalline modules are extremely efficient as, due to the amorphous silicon in their structure, they can achieve up to 10 percent greater efficiencies in the generation of solar energy than comparable thin film modules. Please read through these pages to find out about the other advantages crystalline modules can provide for your power supply.

Link

Crystalline modules

Picture

Handshake

Current State

Close

Difference display

The version can be restored using the **Restore this version** button.

The window is closed using the **Close** button.

Filter

Current page only: If this filter is enabled, only changes to the current preview page are displayed (see the [Page history](#) (Chapter 3.5, page 63) section). If the filter is disabled, all of the changes to the project are displayed (**project history**).

In the **project history**, all of the changes are displayed together with the user, modified element, change date and time as well as the users that last edited the element. Clicking on an entry jumps to the page where the selected change took place.

Additional information about the last change steps for the respective entry can be obtained using a drop-down menu that appears after the mouse pointer is hovered over an entry.



It contains, at most, the last two changes (also called “revisions”) in the specified time frame with user name, a modification comment and the time of the change.


In order to view the history for the current page ([page history](#) (Chapter 3.5, page 63)), the “Current page only” filter has to be enabled.

My changes: If this filter is enabled, only changes from the currently logged-in user are displayed. If the filter is disabled, all changes are displayed.

This filter can also be combined with the “Current page only” or “Deleted elements” filters.

Deleted elements: If the project history is active, the “Deleted elements” filter is displayed.

Only deleted elements are displayed if this filter is enabled.

The deleted element can be restored using the  icon.

Changes since the last release


Changes to the page carried out since the last release can be displayed using the “Display all changes” function in the menu bar (also refer to the [Page status](#) (Chapter 2.1, page 9) page). This way, for instance, the question of: “where are the differences for the released page?” can be answered.

Closing the page/project history

The page/project history can remain open while editing the current page. If the user switches to another page, then the respective changes to the current page are shown in “page history” mode (Current page only filter enabled). In the project history mode, no changes are shown on the current pages.



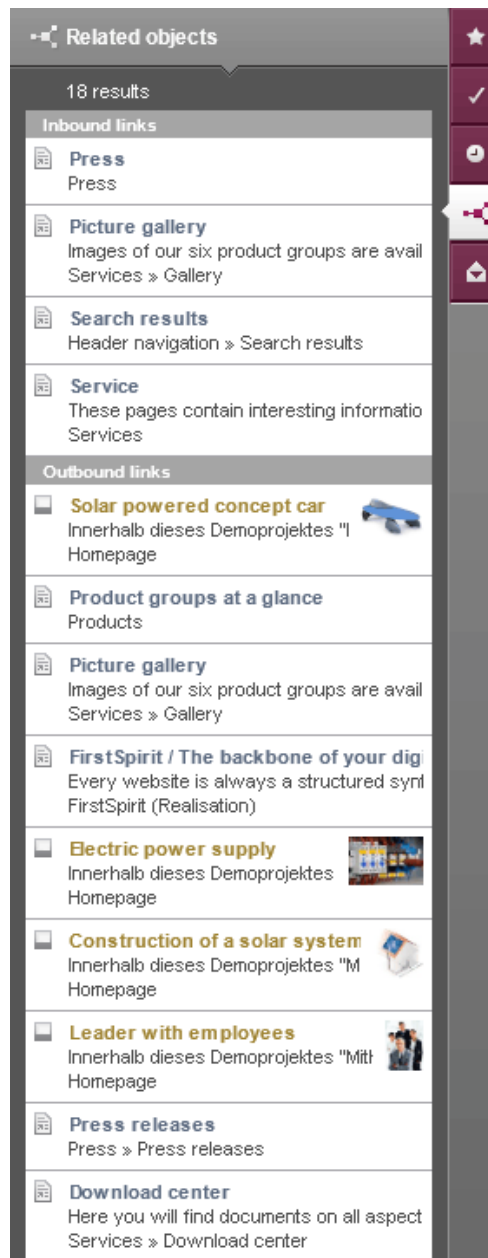
3.6 Related elements

Related elements for the current page, including all of the contained sections, can be reached via the  icon.

The elements are displayed with an object icon, name, descriptive text and, if applicable, a preview image.

The following types of related elements exist:





Related elements

Inbound links

All of the pages in the project that contain a link to the current page are listed here.

Clicking on a page in the list brings the user to that page.



Outbound links

Elements that are used on the current page are listed here. This may include other pages in the project or embedded media.

- If it is a **page**, clicking on the entry in the list goes directly to that page.
- If it is a **medium**, an “Edit” dialog is opened where the media file can be replaced and the name and/or metadata can be modified (also refer to [Editing media](#) (Chapter 2.4.2, page 32)).

Neighborhood

Pages that are under the same menu entry as the current page but do not have their own menu entry are listed here.

This can be the case if, for instance, the [Convert menu item to page](#) (Chapter 2.3.4, page 26) function has been carried out on a page. Normally, such a page no longer appears in the regular navigation and can be reached only using a search, using the “Neighborhood” function or using navigation specifically provided by the project developer. Another example of these types of pages is pages for what is known as a “page group” where multiple pages can be browsed through.

Clicking on an entry in the list jumps directly to the respective page.

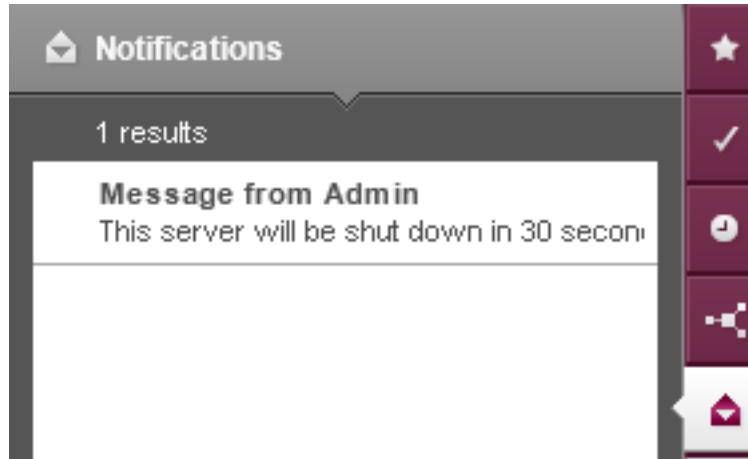


3.7 Notifications

Notifications are listed in this area.

These can originate from people such as the project administrator or other editors.


They are also shown **below the page status** (Chapter 2.1, page 9) for a short time.



Notifications in the report area

3.8 My changes

Objects (e.g. pages or media) that have been modified by the user, but not yet released, are listed in this area.

 A number indicates how many objects edited processed by the user still have not been released.

Clicking on a page changes the preview to that page.


Clicking on a medium opens the [dialog for editing a medium](#) (Chapter 2.4.2, page 32).



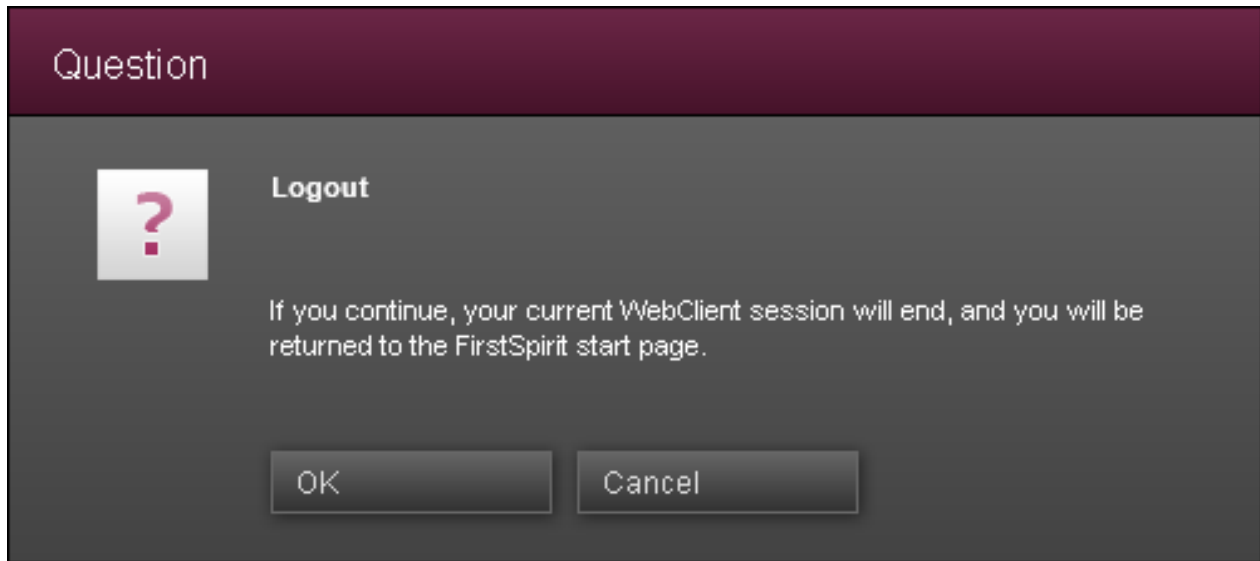
My changes



3.9 Logout

The window with the current WebClient session is closed by clicking on the  icon and affirming a confirmation prompt. The FirstSpirit start page is then displayed again.

The user continues to be logged in on the FirstSpirit server and can log back in to WebClient or another FirstSpirit application using the FirstSpirit start page.



Confirmation prompt

4 Editing the preview page

The menus and functions shown up to this point for creating pages and media and for controlling the page status are available on the upper and right borders of the WebClient screen.

Most content is, however, edited directly on the respective page shown in the browser, which is called the “preview page”. Icons with a variety of functions are available there and are described below.

First, the FirstSpirit operating concept and some terminology that is used repeatedly in relation to FirstSpirit will be explained for better understanding.



4.1 The FirstSpirit operating concept

The various FirstSpirit control elements are presented on this page. The concept behind them applies for both WebClient and JavaClient; however, the function and appearance may vary.

- **Input elements** (Chapter 4.1, page 76)
- **Sections** (Chapter 4.1, page 77)
- **Pages** (Chapter 4.1, page 80)
- **Reusable content** (Chapter 4.1, page 81)
- **Structure** (Chapter 4.1, page 83) (folders and stores)

Input elements

“Input elements” are the most important and the smallest control element in WebClient. They are used to put content such as text, images and the like onto a website. There is normally a special input element type for each content type and each application case.

Application/target	Example of a used input element
Entering text on a website	Single-line text (Chapter 4.6.1, page 122)
	Multi-line text (Chapter 4.6.2, page 122)
Additionally formatting and linking text in a manner similar to word processing programs	Rich text editor (Chapter 4.6.3, page 123)
Adding tables	Rich text editor (Chapter 4.6.3, page 123)
	Rich text editor for tables (Chapter 4.6.4, page 128)
Uploading images and files in a system and/or placing them on a website	Internal references (Chapter 4.6.5, page 131)
	Rich text editor (Chapter 4.6.3, page 124)
Incorporating links to other websites	Rich text editor (Chapter 4.6.3, page 124)
	Link input (Chapter 4.6.6, page 134)
Specifying the layout and design of a page	Various input elements



Depending on the function, these input elements are text fields, **selection lists**, **dialogs** (Chapter 4.2.2, page 97) and the like or combinations. The way content applied by editors, such as text entered in text fields or selected images, is displayed on the website later on depends on the project developer's specifications. This includes the color of the entered text, where text or an image will appear on the website and much more.

Input elements for a type can be **configured differently** depending on the project requirements. This means input elements for a type, such as the rich text editor, can vary in appearance and function. Normally, however, the input elements used should be self-explanatory and/or be provided with an informative title and tool tip by the project developer.

A list of the most important input elements can be found in the **Input elements** (Chapter 4.6, page 119) chapter.

Sections

In FirstSpirit, many “input elements” are frequently condensed into what are known as “sections” (or, more universally: “(input) form”. This way, simple, logical units can be created on a website.

(A section in FirstSpirit is not always equivalent to a “typographical” paragraph.)

A conceivable and frequently used unit (i.e. a section) can contain the following, for instance

1. A header,
2. Continuous text,
3. An optional image,
4. A caption and
5. A link to a secondary page

The necessary input elements for this could be selected as follows (also refer to the figure):

1. Input element for single-line text
2. Rich text editor
3. Input element for internal references
4. Input element for single-line text



5. Input element for internal references

In contrast, other **section types** can contain other combinations of input elements or even just one input element. The composition always depends on the project developer's specifications. The input elements can be listed one under the other or, for a better overview, summarized in groups. Division into various groups represents what is known as **grouping** (Chapter 4.6, page 121).

These section types are defined in FirstSpirit by the template developer using what are known as **templates**. The editor can then select the desired template from those available when creating a section.



Section English

Headline

Continuous text

Picture

Mithras Energy (Enter search term)

No element has been selected

Caption

Link


Mithras Energy (Enter search term)

No element has been selected

Save Cancel

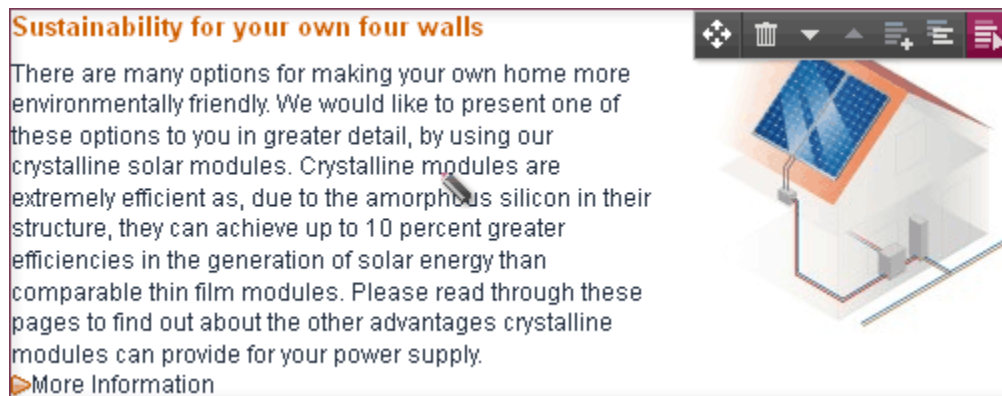
Example of an input form for a section

The location **where** sections can be created or edited on a page always depends on the project and can be recognized based on the frame and icons that are displayed when the mouse pointer is hovered over an editable area on the website.

If a section already exists on the page, the **icons** (Chapter 4.3, page 105) available there can be used. Otherwise, there are project-dependent options, such as an icon or a button on the page:  Create section

For more information, also refer to the **Sections** (Chapter 4.3, page 105) page.






A section in a preview page

Pages

A WebClient page always corresponds to a page on the website. This way, the editor can always see directly in WebClient which pages have which content on the website and how the content is displayed.

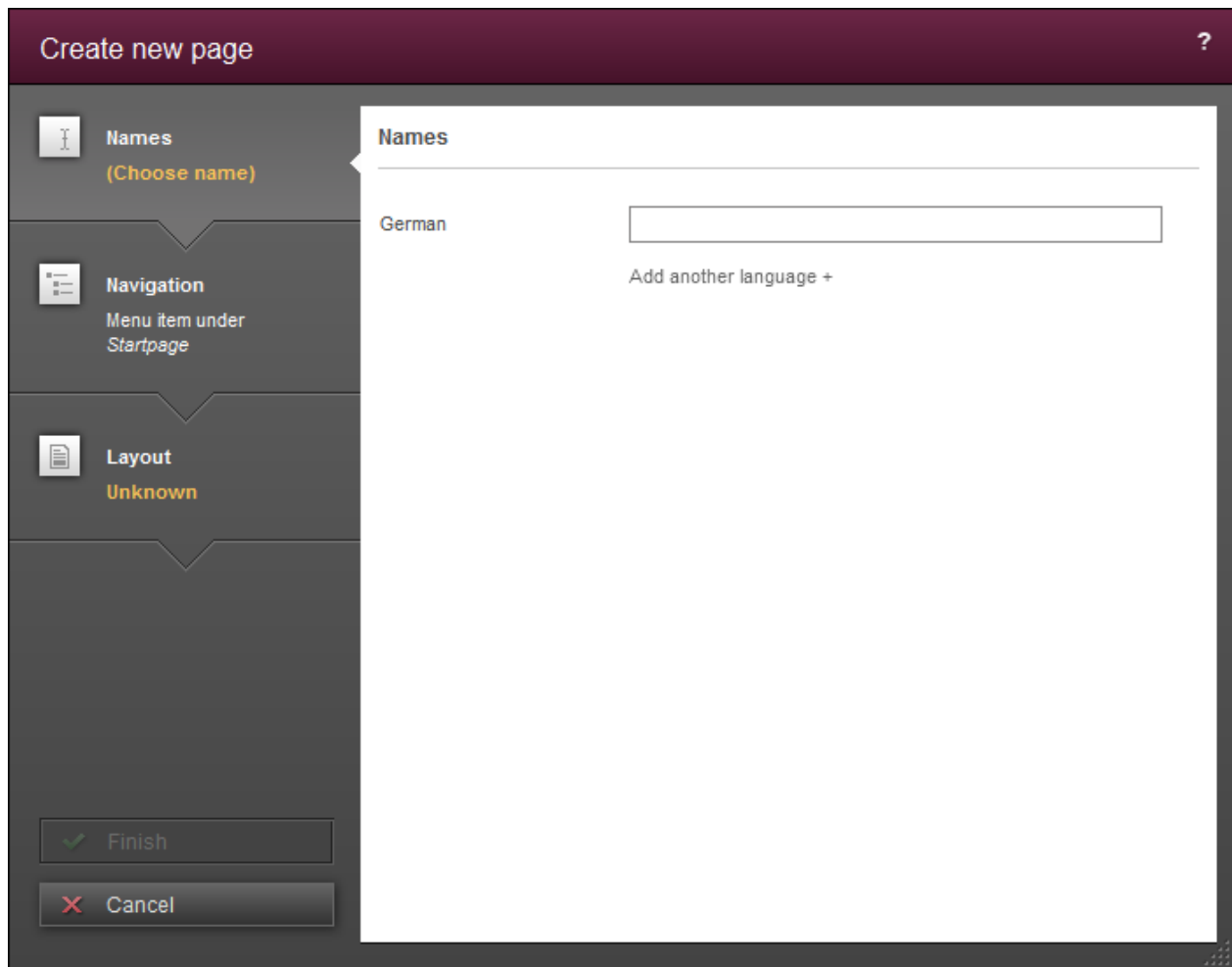
For this purpose, a WebClient page normally contains one or more sections where the website content is collected and managed. Sections can never exist by themselves; they always require a page first. New pages can be created only using the corresponding function on the menu bar in the **content area** (Chapter 2.3.1, page 18).

In addition to sections, a page can also have its own input elements (all input elements which are displayed in the **editing window** (Chapter 4.2.1, page 86) on page level are also known as an "input form") where information can be collected. These forms should be available on **each** page of a **page type**, e.g. a page title to display in the browser, a company logo, a footer with copyright and last changed information, navigation, etc. The usable input forms are the same as those for sections. In many cases, however, such content can be output automatically with the help of FirstSpirit by using project developer specifications so that the editor does not have to worry about this information.

This content can be edited using the  icon on the preview page. In contrast to sections, there are no other editing options for page content (we also refer to "page level").

To create or move pages in the navigation and to rename menu items, see the **Content area** (Chapter 2.3.1, page 18) page. To edit input forms on a page, see the **Input forms** (Chapter 4.6, page 119) chapter.





Dialog for creating a page

Reusable content

Aside from the sections, where content is primarily maintained on the website, FirstSpirit offers yet another important option for maintaining content. These are known as **data records**.

This content type is used frequently for content that is well-structured and can be recorded and displayed in tables.

Examples:

- **Press releases**, which frequently contain the following information:
publication date | validity period | heading | subheading | teaser | continuous text | image | caption



- **Contact lists** containing the following information:
title | first name | last name | telephone number | e-mail address | street | city |
country | image
- **Product catalog** containing the following information:
product name | product description | image | category | dimensions | weight

In addition, the **relationship** between multiple data record types can be established. For instance, someone from the contact list could be selected for reference in a press release or as the contact person for a product or as the author of an entry. All or some of the persons selected as contacts could then be output for a press release automatically and would not have to be entered in multiple places in FirstSpirit.

In FirstSpirit, content managed in these kinds of data records can

- be **output in a flexible way**.
For instance, press releases can be output automatically sorted by date without the editor having to worry about sorting. Furthermore, a number of data records specified by the project developer (of the same type) can appear on a page. If more data records become available they are automatically spread over multiple pages. A browsing function (e.g. “Back” | “Forward”) can be used to switch between pages.
This also means the editor cannot always affect the location of content; instead, it is specified by the project developer.
- be **(re)used** at multiple locations.
This means that if a data record is changed on one page, the change applies on other pages as well.
- be maintained, like sections, **in multiple input elements**.
This allows the content to be structured in the first place. The input elements that are used are the same as those for sections.
- be drawn from **external databases**.
This means that data that has been collected on other systems can be reused in FirstSpirit easily.
- also **just be selected** and do not have to be edited.
This way, data records from external systems (and other data) can be protected from undesired modifications.

Also refer to the [Data records](#) (Chapter 4.5, page 114) page.



Structuring

Since quite a lot of content is usually entered and managed in FirstSpirit, what are known as **folders** are used at many locations for structuring content and for improving retrieval similar to well-known file management programs such as Microsoft Windows Explorer. Folders also enable highly granular assignment of rights to specific content. These folders can have as many subfolders as desired. Due to these subfolders, the paths are displayed at some locations.

Folders are symbolized by this icon: 

In principle, folders that are created in JavaClient are accessed in WebClient this way, e.g. for **uploading** (Chapter 2.4.1, page 28) or **selecting** (Chapter 4.6.5, page 131) media.

Aside from folders that can be created by themselves in JavaClient as needed, content in FirstSpirit is managed separately based on **content types** such as media, pages and data records. For each content type there is a so-called **store**. They can be selected for example by using the input element **Reference selection (FS_REFERENCE)** (Chapter 4.6.5, page 131):

- **Menu Structure:** The structure of the pages and the navigation are managed here. Menu items of the website are normally composed by folders. Also refer to the **The content area on the menu bar** (Chapter 2.3, page 17).
Store color: **blue**
- **Media:** All of the media (images, PDF, video, audio files etc.) that is to be used on the website is managed here. Also refer to the **Media area** (Chapter 2.4, page 28).
Store color: **yellow**
- **Data sources:** **Reusable content** (Chapter 4.1, page 81) is managed here. Data records with the same structure, i.e. with the same input elements, are combined generally in a so called “data sources”. One data source can be for example a contact list in which contact data for every employee of a company can be entered and saved. Salutation, first name, last name, call number, e-mail address, street, house number, city, country and a picture for example can then be saved each in an appropriate **input element** (Chapter 4.6, page 119) for each data record of this contact data source.
Store color: **brown**

In addition, there are even more stores that are of little relevance for working with the WebClient.



The system specifies in which store which content type is created. Therefore, in some cases, a default selection by store can occur when selecting content (e.g. for **internal links** (Chapter 4.6.3, page 124)).

A store normally contains multiple folders.



4.2 Working with dialogs

There are recurring dialogs in WebClient 5.0 which shall be described below.

- Dialog for **Editing elements** (Chapter 4.2.1, page 86)
This dialog is used for entering and changing a website's content.
- Dialog for **Selecting elements** (Chapter 4.2.2, page 97)
This dialog is used for such things as selecting images, files or links to other pages on the website. It is available, among other places, in “Dialogs for editing elements”.
- Dialog for **Editing image sections** (Chapter 4.2.3, page 102)
This dialog can be used for editing images.

Close dialogs with "X"

With a few exceptions all WebClient dialogs have a “X” in the header, which can be used to close dialogs globally.

If modifications have been made within such or a superior dialog, the editor will be informed by a security question, that all changes will be lost if the closing of the dialog will be confirmed.


If the closing of the dialog is canceled, exactly the dialog within the stack remains opened, in which the last modifications were carried out, and the editor gets the chance to save this changes.

Example based on the project “Mithras Energy”

The Download center of the sample project “Mithras Energy” is a **section list** (Chapter 4.6.8.3, page 146), which contains a **link list** (Chapter 4.6.8.3, page 146). Thus it is possible to form a stack of three dialogs (e. g. “Download center” – “Products” – “Productgroups”).

If no modification was carried out within this stack all three dialogs will be closed with a click on the “X” in the dialog “Productgroups” without any security question.

If modifications were carried out only in the dialog “Products”, this dialog will be opened again, when the “X” is clicked in the dialog “Productgroups” and the security question has been canceled.



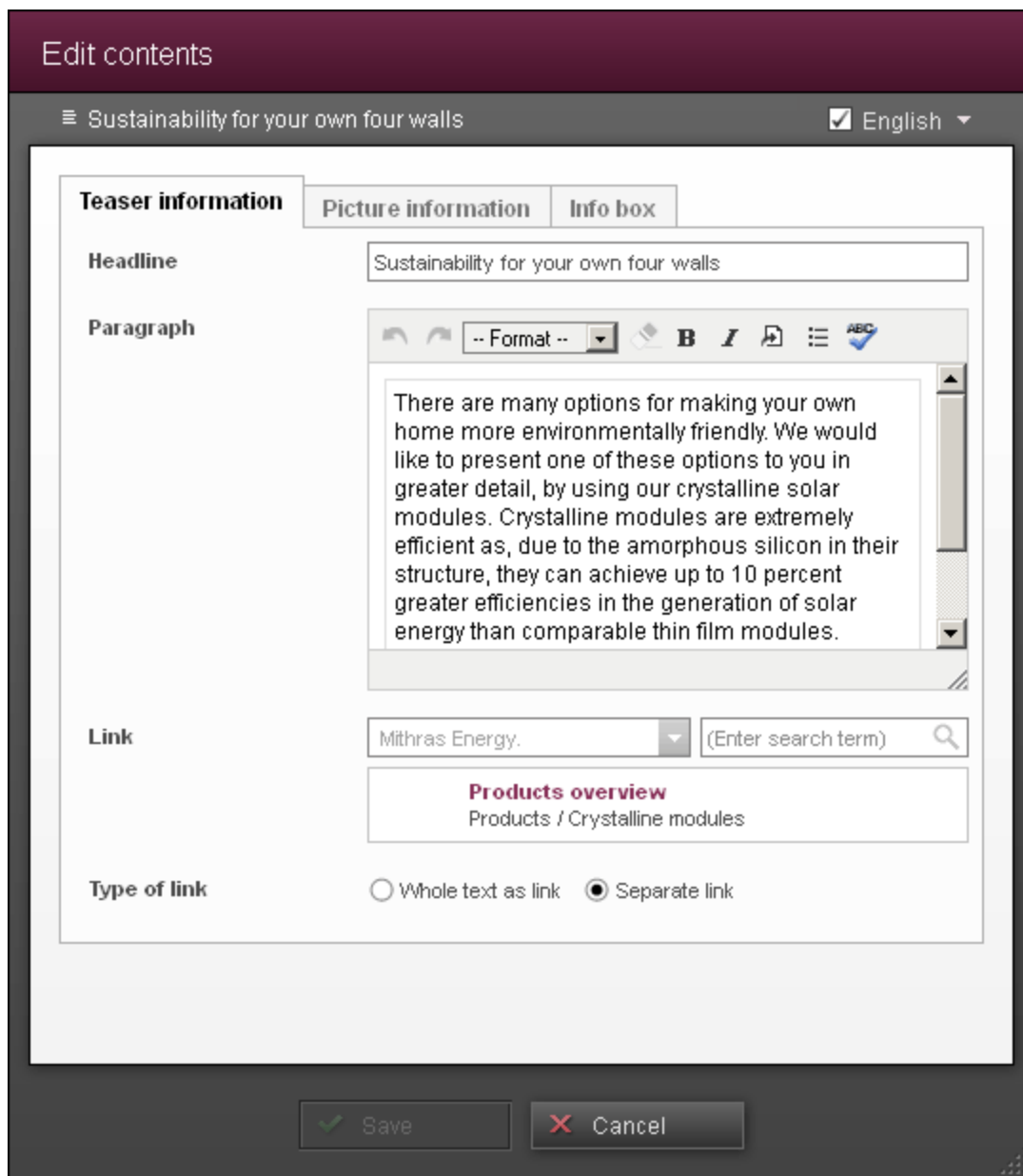
4.2.1 Editing content

A page's or section's content is edited using an edit window where all of the input elements for the page or section are displayed (see the [The FirstSpirit operating concept](#) (Chapter 4.1, page 76) page).

The edit window can be moved on the screen using the mouse pointer and can be made bigger or smaller using the adjustment handle in the bottom right corner.

The arrangement of the input elements in a section depends on the specifications from the project developer.





Multilingualism

The name of the section currently being edited is in the gray area above the input components.

A **drop-down box** is located on the right side for selecting the project language for which the changes to the selected section are to be made. The default setting here is always the current language of the preview content.



Some content, such as images or proper names, can be managed **independent of language** if the content is or should be identical in all languages. In this case, the content is entered just once but is available in all project languages. This time-saving language-independent definition of content is useful when displaying proper names, images (without text) or numerical data (such as dimensions).

In this case, it does not matter in which language the specific content is entered.

Displaying or hiding a section

The **check box** can be used to control whether the section is to be displayed in the preview or later on the generated page.

- If the check box is *checked*, once the changes are confirmed the edited section is taken into account for both page generation and previewing, i.e. when the section is displayed in a browser window.
- If the check box is *unchecked*, once the changes are confirmed the edited section is no longer shown in the browser window; it is “hidden”. Hidden sections can be made visible again by using the Show hidden sections function in the preview.

Sections can be hidden for a short time and displayed again as needed by using this check box (see the [The page status on the menu bar](#) (Chapter 2.1, page 9) page, paragraph [Hidden sections](#) (Chapter 2.1, page 15)).

See the following pages for information about the editing window concerning

- [data records](#) (Chapter 4.2.1.1, page 88)
- [metadata](#) (Chapter 4.2.1.2, page 89)
- [rule violations](#) (Chapter 4.2.1.3, page 94)


4.2.1.1 Editing contents – Data records

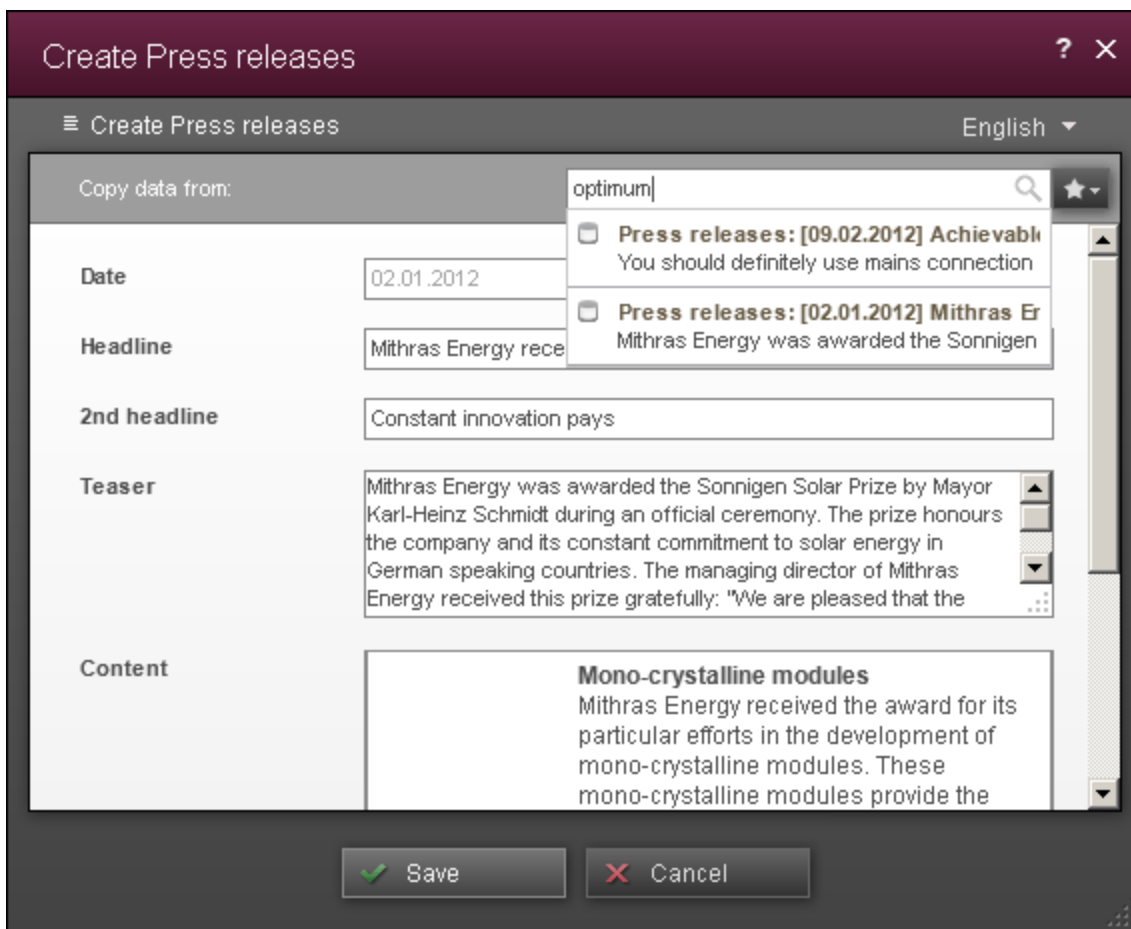
Creating and editing data records

Editing data records is likewise done via the edit window as [previously](#) (Chapter 4.2.1, page 86) described. Only when [creating data records](#) (Chapter 2.3.2, page 22) does the edit window also offer a search option on the top border. With this search, you can search for already-existing data records of the same type and take over specifications for the data record to be newly created, processed and then saved.



The search function here offers only data records of the same type. If, from the “Contents” menu, you select the entry “Create Press releases”, the search offers only existing press releases as search results in the edit window.

If suitable master copies are available within the project, they will be displayed when clicking the icon  (see also page [Create data records](#) (Chapter 2.3.2, page 23)).



Takeover of existing data record contents


4.2.1.2 Editing contents – Metadata

Entering and editing metadata

Metadata involves additional information which can be saved for an element (for example, pages or media), which however does not have to be intended for the page viewer. It can, for example, be used to describe content of a website and thus made more visible to search engines.



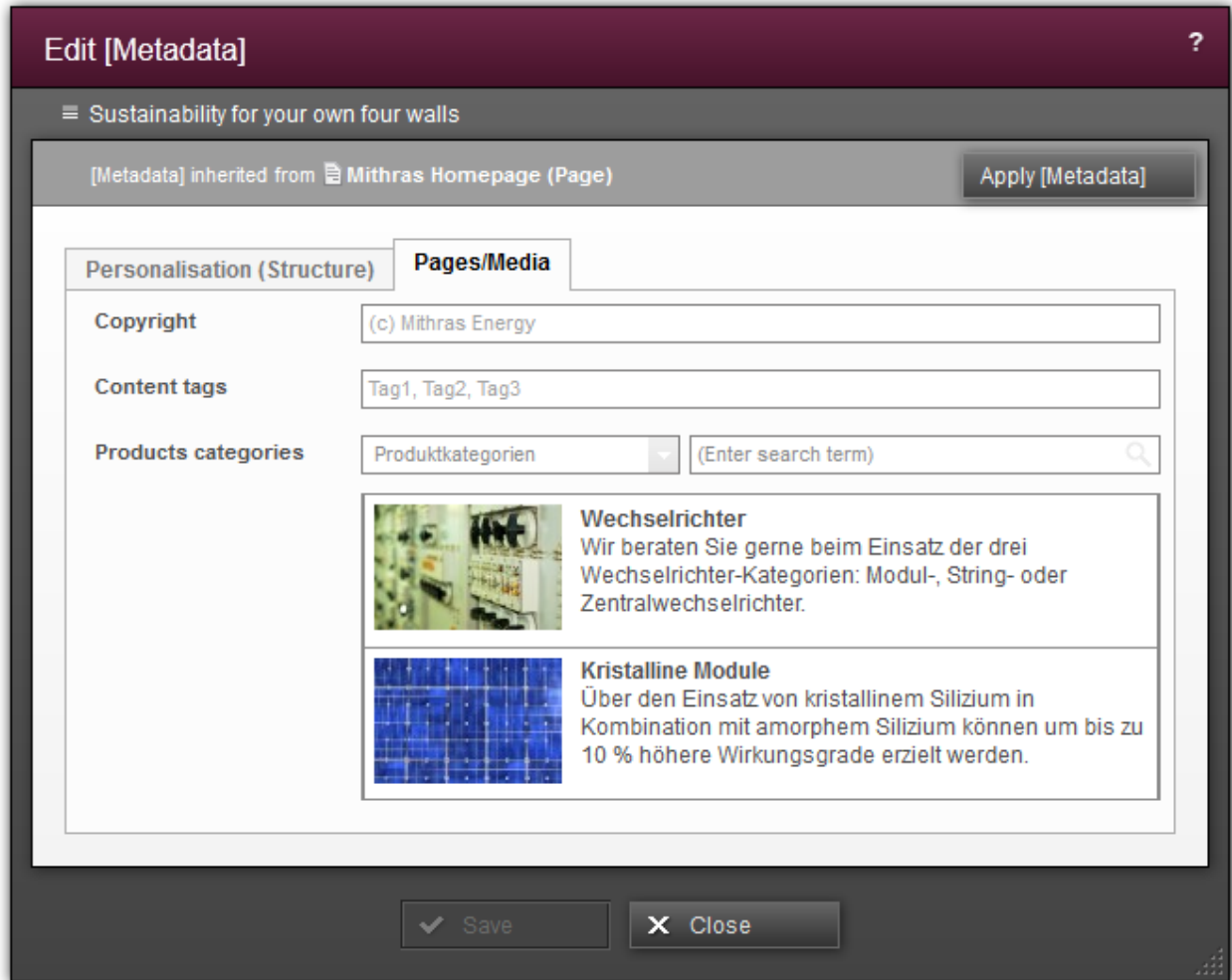
Metadata can be entered at multiple locations in the project:

- **Pages and menu items:** Metadata for the currently visible page and the current menu item (see also [Adding a new page](#) (Chapter 2.3.1, page 18) in the Section on “Navigation”) can be processed and entered via the menu function [Content – Edit – Edit metadata](#) (Chapter 2.3, page 17).
- **Sections:** Metadata for a section can be entered and processed via the icon . See also page [Creating and editing sections](#) (Chapter 4.3, page 105).
- **Media:** Metadata for media can be entered and edited
 - when uploading (menu function [Media – New – Upload new medium](#) (Chapter 2.4.1, page 28) or in the corresponding input elements (for example, for [reference selection](#) (Chapter 4.6.5, page 131)).
 - when editing (menu function [Media – Editing](#) (Chapter 2.4.2, page 32)).
 - in search results ([Report area – Search](#) (Chapter 3.2, page 43)).

To change existing metadata, the last option named is best used (via the search results display).

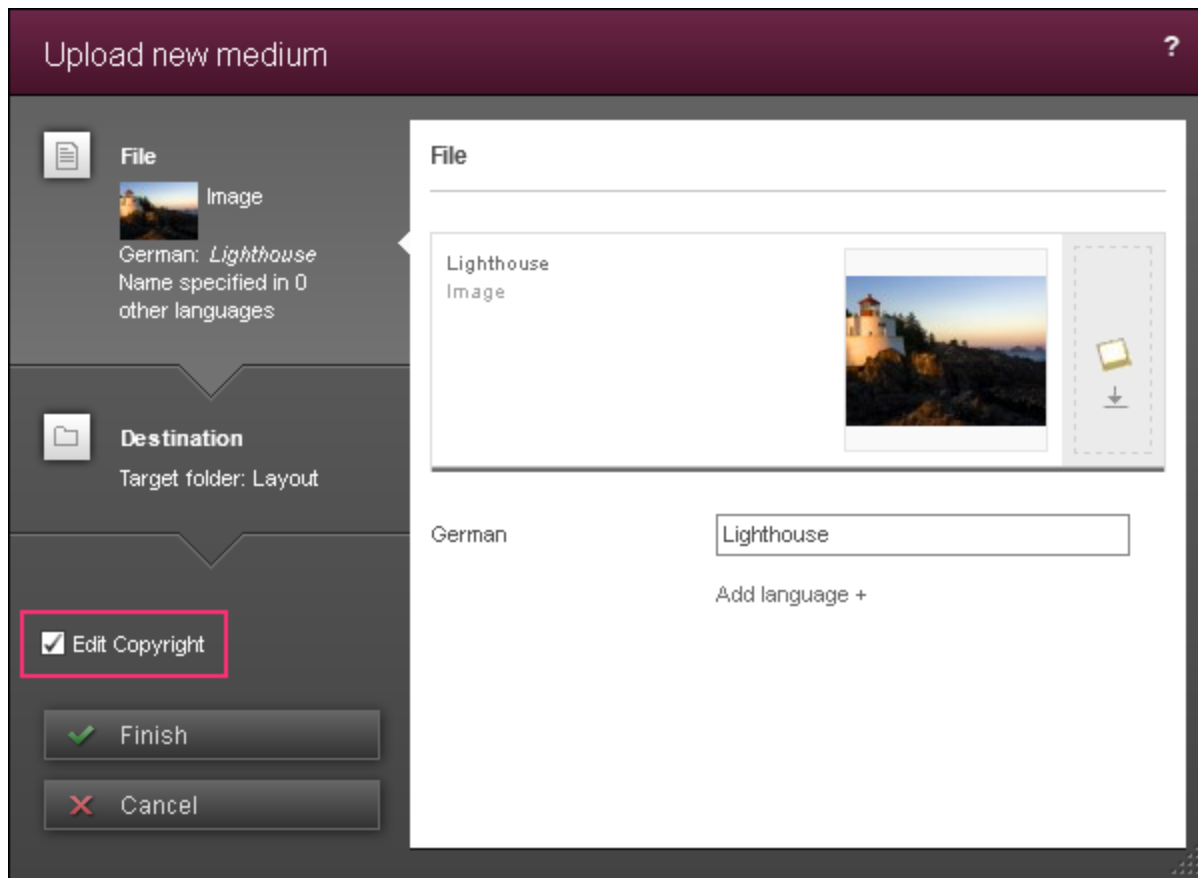
! Whether and for which of these types of content metadata can be stored depends on the configuration by the project developer and the administrator.





Dialog to edit metadata

Metadata can be named differently from project to project. In a media project, for example, there could be information about copyright and source stored as metadata. The checkbox in the dialog for **uploading** (Chapter 2.4.1, page 31) or **editing** (Chapter 2.4.2, page 32) media could then for example be labeled with “copyright”. In the following, the text “[Metadata]” is used as a placeholder for metadata names in the user interface.



Setting, taking over, and removing metadata

A particularity of metadata is that it is passed on to subordinate elements. This way, the effort for updating metadata in the project is reduced, because it does not have to be given to every element individually. For example, passing on from a higher-level menu item to a subordinate menu item, from menu items to pages beneath them, and from pages and sections of this page are possible.

If, for a subordinate element, different metadata apply than for on the higher-level element, this must be explicitly defined on the subordinate element.

In the edit dialog for metadata, therefore, for every element, it can be read out whether metadata is even defined for the element at all and whether this is defined directly on the element or inherited from a higher-level element.

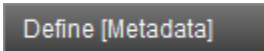
- "[Metadata] defined."




The metadata shown in the dialog are defined directly on this element and can be edited here. The **Erase [Metadata]** (Chapter 4.2.1.2, page 93) button can be used in order to remove the metadata.

- **"[Metadata] inherited from [higher-level element]."**
The metadata shown in the dialog are inherited from another element. In order to be able to edit the metadata shown, the **Apply [Metadata]** (Chapter 4.2.1.2, page 93) button must be used.
- **"[Metadata] not set."**
For this element, neither direct metadata were defined, nor are they passed on from another element to this one. In order to be able to enter metadata for this element, the **Define [Metadata]** (Chapter 4.2.1.2, page 93) button must be used.

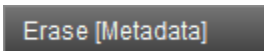
Whether metadata is to be defined, removed or taken over from another element can be defined by means of the following buttons:

A rectangular button with a dark grey background and light grey text that reads "Define [Metadata]".

For the current element, there are no metadata defined, and no metadata is inherited from another element. This button has to be used in order to be able to enter metadata for this element.

A rectangular button with a dark grey background and light grey text that reads "Apply [Metadata]".

The current element inherits metadata from a higher-level element. With this button, deviating metadata can be defined, thus interrupting the inheritance. The metadata inherited from the higher-level element are also taken over as templates and can be changed. These metadata then apply for this element and are passed on to subordinate elements.

A rectangular button with a dark grey background and light grey text that reads "Erase [Metadata]".

There are metadata defined directly for the current element. They can be removed via this button. If metadata is defined on a higher-level element, they are inherited from the higher-level element to this one. The inheritance is thus restored.

All metadata forms are generally single-language; in other words, there is no option for making specifications in multiple project languages.



4.2.1.3 Editing content– rule violation

Rule violations

Depending on the project configuration, rule violations and recommendations for filling out the form can be shown in the **edit windows** (Chapter 4.2.1, page 86) .

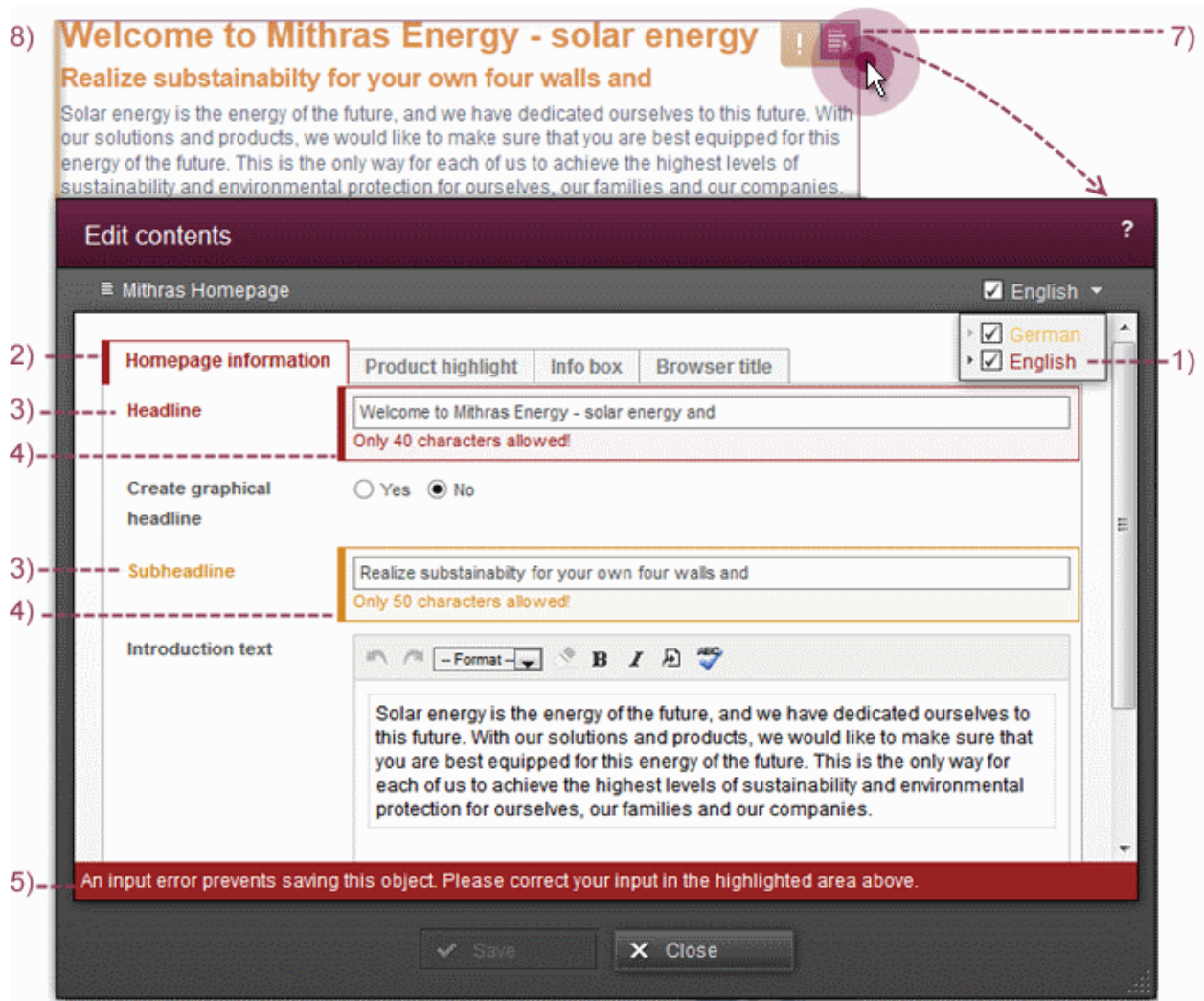
A rule violation can occur, for example, if a required input element was not filled out, if more characters were entered in a text input element than allowed or if input was made that is faulty content-wise or formally.

Moreover, under certain conditions defined by the template developer, individual input elements of a form disappear or are changed depending on input in other input elements of the form.

Representation of rule violations

Any violation of a rule will always be shown immediately when editing a form:





8) **Welcome to Mithras Energy - solar energy** !

Realize sustainability for your own four walls and

Solar energy is the energy of the future, and we have dedicated ourselves to this future. With our solutions and products, we would like to make sure that you are best equipped for this energy of the future. This is the only way for each of us to achieve the highest levels of sustainability and environmental protection for ourselves, our families and our companies.

Edit contents ?

Mithras Homepage English

2) **Homepage information** Product highlight Info box Browser title

3) **Headline** Welcome to Mithras Energy - solar energy and

4) Only 40 characters allowed!

Create graphical headline Yes No

3) **Subheadline** Realize sustainability for your own four walls and

4) Only 50 characters allowed!

Introduction text

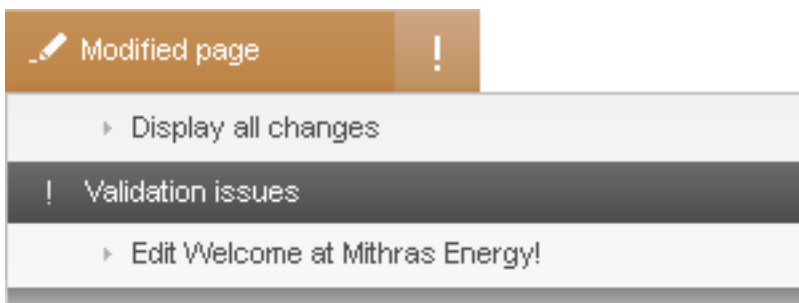
5) An input error prevents saving this object. Please correct your input in the highlighted area above.

Save Close

1. Colorful writing in the language changer indicates that rule violations are pending in one or more **Languages**. Additionally, on the bottom border, a corresponding message appears (see also section **Notification levels** (Chapter 4.2.1.3, page 96), below).
2. If a form contains tabs (**grouping** (Chapter 4.6, page 121)), tabs on which rule violations are pending are marked in color.
3. Every individual **input element** for which a rule violation is pending is emphasized in color.
4. There are (language-dependent) **correction notes** which are shown, as long as these were defined by the template developer.



- 5. Alongside these correction messages defined by the template developer, a correction message is automatically displayed by the system.
- 6. The **page status** shows saving and release-preventing rule violations (see Section **Notification levels** (Chapter 4.2.1.3, page 96), below) on the current page (“Validation issues”, see the figure below and page **Page status** (Chapter 2.1, page 10)). By clicking on an entry, the affected **form** (Chapter 4.2.1, page 86) opens and can be corrected directly.
- 7. On the current **Preview page**, rule violations are shown by a yellow exclamation mark in the icon bar when you move the mouse over the area (see also the page on **Edit sections** (Chapter 4.3, page 105)).
- 8. Likewise, the area is marked yellow if you move over it using the mouse.

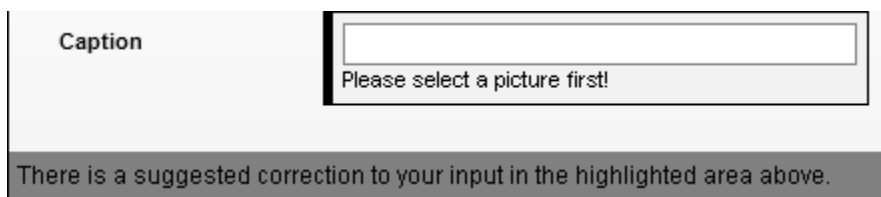


6. Page status – validation problems

Notification levels

For a rule violation, there are three notification levels with different representations and effects for the user.

Correction recommendation

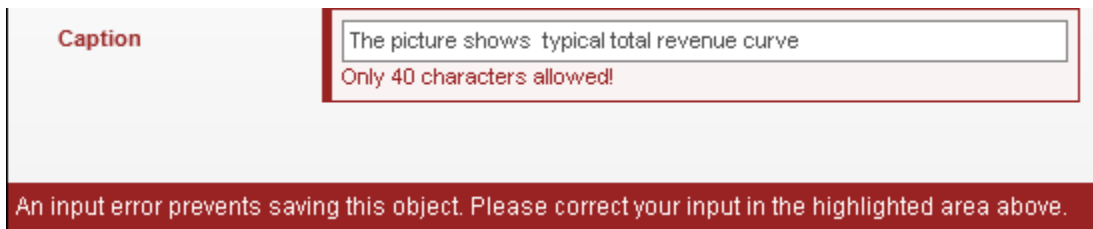


A correction recommendation is pending.

The element can be saved and released.



prevents saving

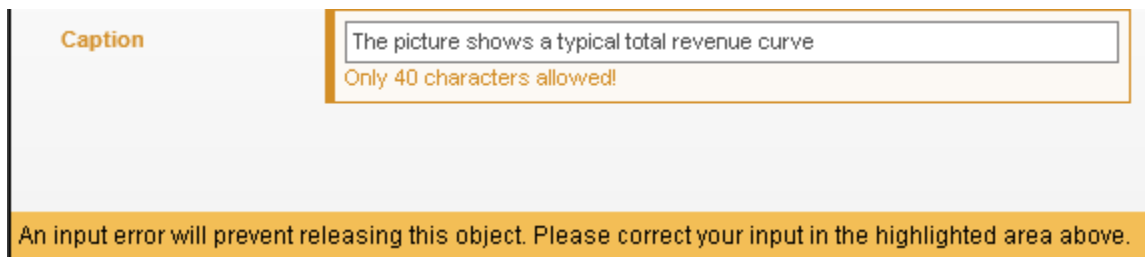


The screenshot shows a web editor interface. On the left, there is a label "Caption" in red. To its right is a text input field containing the text "The picture shows: typical total revenue curve". Below the input field, a red error message reads "Only 40 characters allowed!". At the bottom of the interface, a red banner contains the text: "An input error prevents saving this object. Please correct your input in the highlighted area above."

A rule violation is pending (marked red).

The input must be corrected so that a **save** (Chapter 4.2.1, page 86) is possible.

prevents release



The screenshot shows a web editor interface. On the left, there is a label "Caption" in orange. To its right is a text input field containing the text "The picture shows a typical total revenue curve". Below the input field, a yellow error message reads "Only 40 characters allowed!". At the bottom of the interface, a yellow banner contains the text: "An input error will prevent releasing this object. Please correct your input in the highlighted area above."

A rule violation is pending (marked yellow).

The element can be saved. The inputs have to be corrected so that a **release** (Chapter 3.4.2, page 54) is possible.

4.2.2 Selection dialog

A selection dialog is used at every point in the project where elements can be selected.

In this context, the elements could be images, files or other pages and sections from the project. In the world of FirstSpirit, these are often called "references" as well. This means, for instance, if an image is selected, it is not added to the specified page directly, instead a link to the corresponding graphics file that was uploaded to the project previously (e.g. using the **Media** (Chapter 2.4.1, page 28) menu).

Likewise, there are references to other object types in FirstSpirit such as pages, sections or data records.



Search field

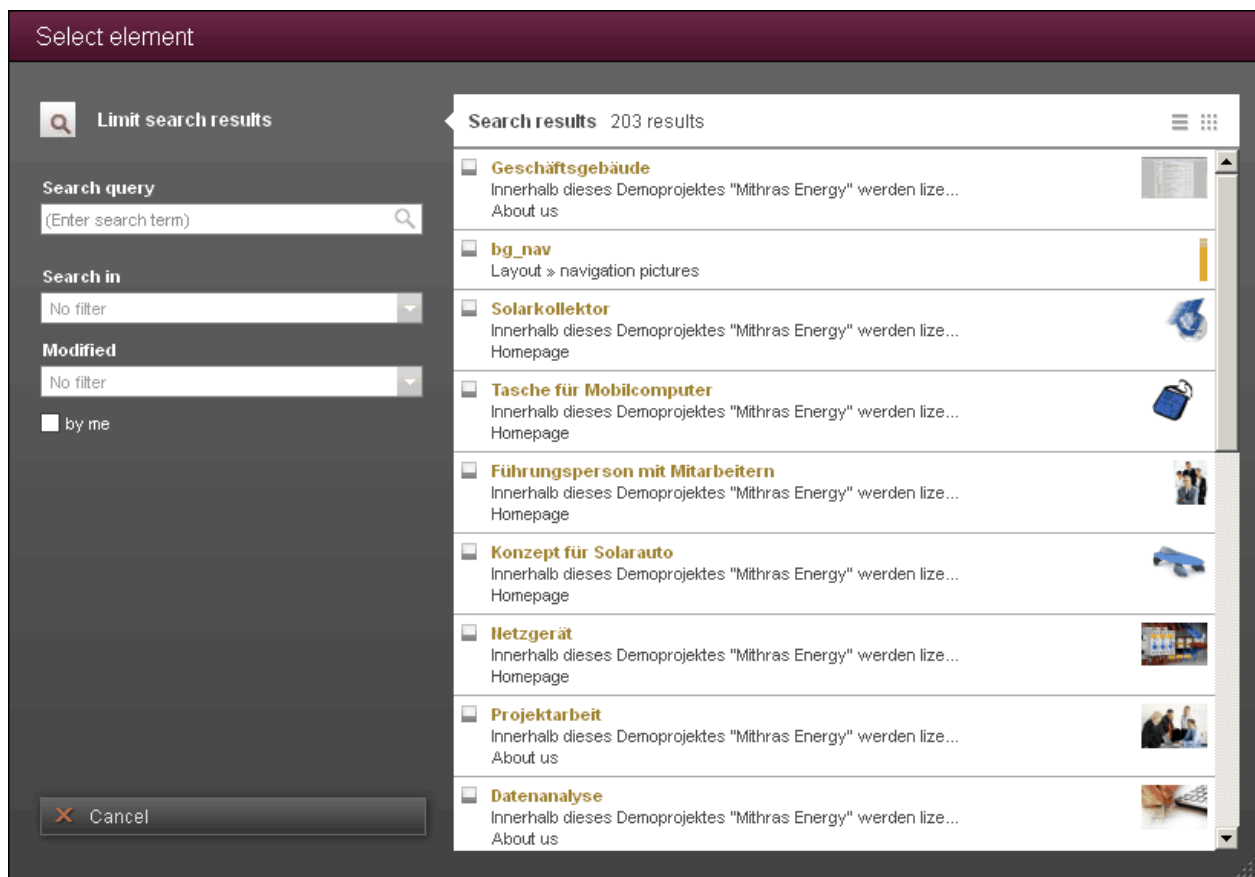


The selection dialog can normally be used at all of the points where search field shown here is displayed (cf. such as [reference selection](#) (Chapter 4.6.5, page 131) input element, [internal links](#) (Chapter 4.6.3, page 124) in the rich text editor, etc.).

The name or part of the name of a specific reference can be entered in the search field. Thus the list of elements is reduced to the possible results automatically.

Clicking on the magnifying glass opens the [selection dialog](#) (Chapter 4.2.2, page 98) where the search can be limited to the storage location, editing time frame and current user.

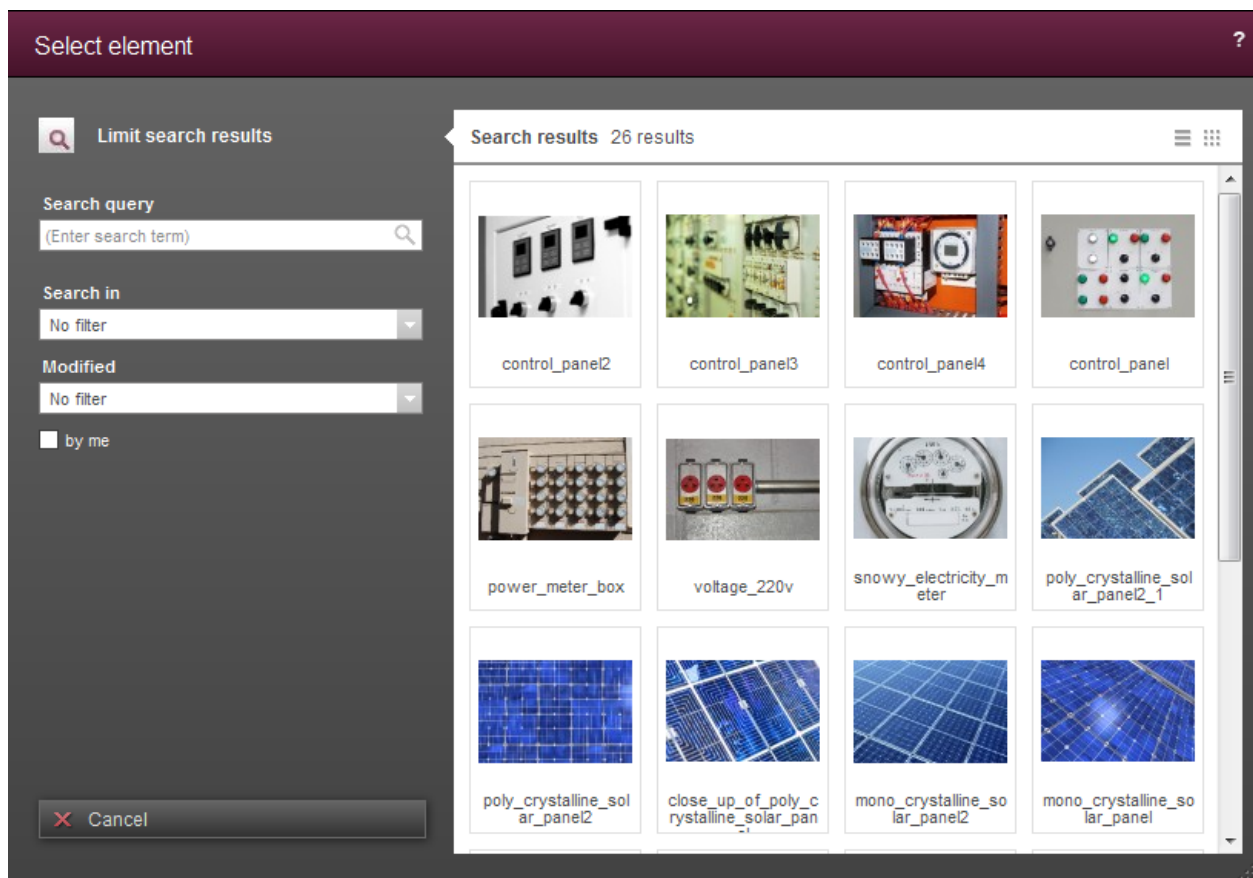
Selection dialog



The selection dialog itself is set up so that all of the elements available for selection are listed on the right. For displaying the results, also see the introduction to the **Report area** (Chapter 3, page 36) chapter.

Make selection: The desired element is selected with one click. The selection dialog closes again.

Limit elements: Different options are available in the left area of the dialog for limiting the number of elements available for selection:



By default the selection dialog will be opened with the search hits displayed in list form. But it is possible that the allowed elements of a **reference selection** (Chapter 4.6.5, page 131) are limited to images only. In this case the selection dialog will be displayed with a preview of the search hits.



Search request

Names or parts of names for the element being searched for can be entered in this field. Terms that have been entered in the edit window's **search field** (Chapter 4.2.2, page 98) are used here as well.

The search functions the same way as the **search in the report area** (Chapter 3.2, page 41).

The search is restarted by clicking on the magnifying glass.

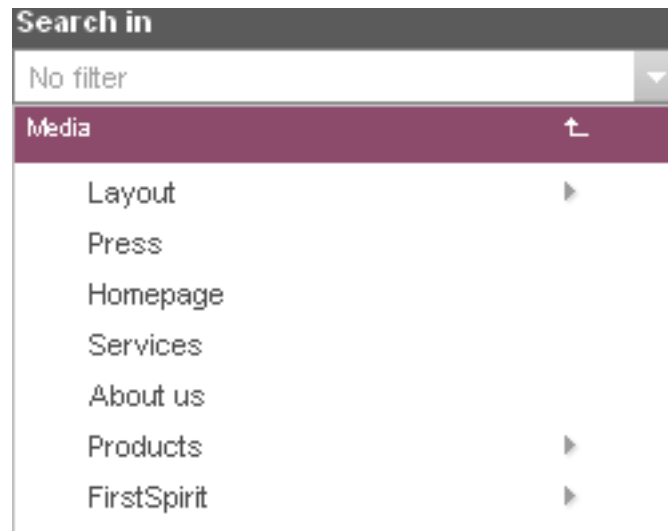


Click this icon to display the search hits in list form.



Click this icon to display the search hits with a preview.

Search in



The specified element can be selected using the **folder and store structure** (Chapter 4.1, page 83) here.

In the case of **data records** (Chapter 4.1, page 81), the type of data record can be selected here.

 Clicking on this icon displays the available folders.



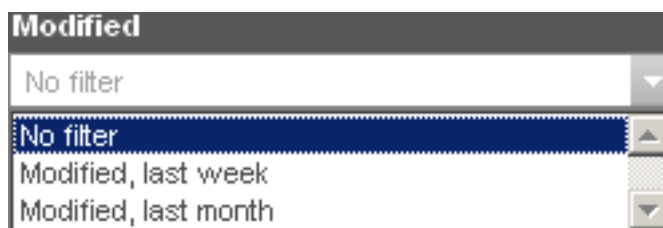
▶ Clicking on this icon displays all of the folders below the current level. This can be used to navigate to the desired folder level.

In the area on the right, only the elements below the selected folder level are now still visible. A folder level is selected by clicking on that level.

⊞ The focus can be switched to the next higher level by clicking on a line with this icon.

✓ The selected level is indicated with bold text and this icon.

Modified



The elements available for selection can be limited chronologically by using this filter function:

- *No filter*: All of the elements that meet the search criteria are displayed. This is the standard setting.
- *Modified, last week*: Elements that were created or modified within the last 7 days are displayed
- *Modified, last month*: Elements that were created or modified within the last 30 days are displayed

By me



If this check box is enabled, only elements that the logged in user created or edited are displayed.

Cancel

A “Cancel” button is available on the bottom left, which can be used to close the element selection dialog without making a selection.



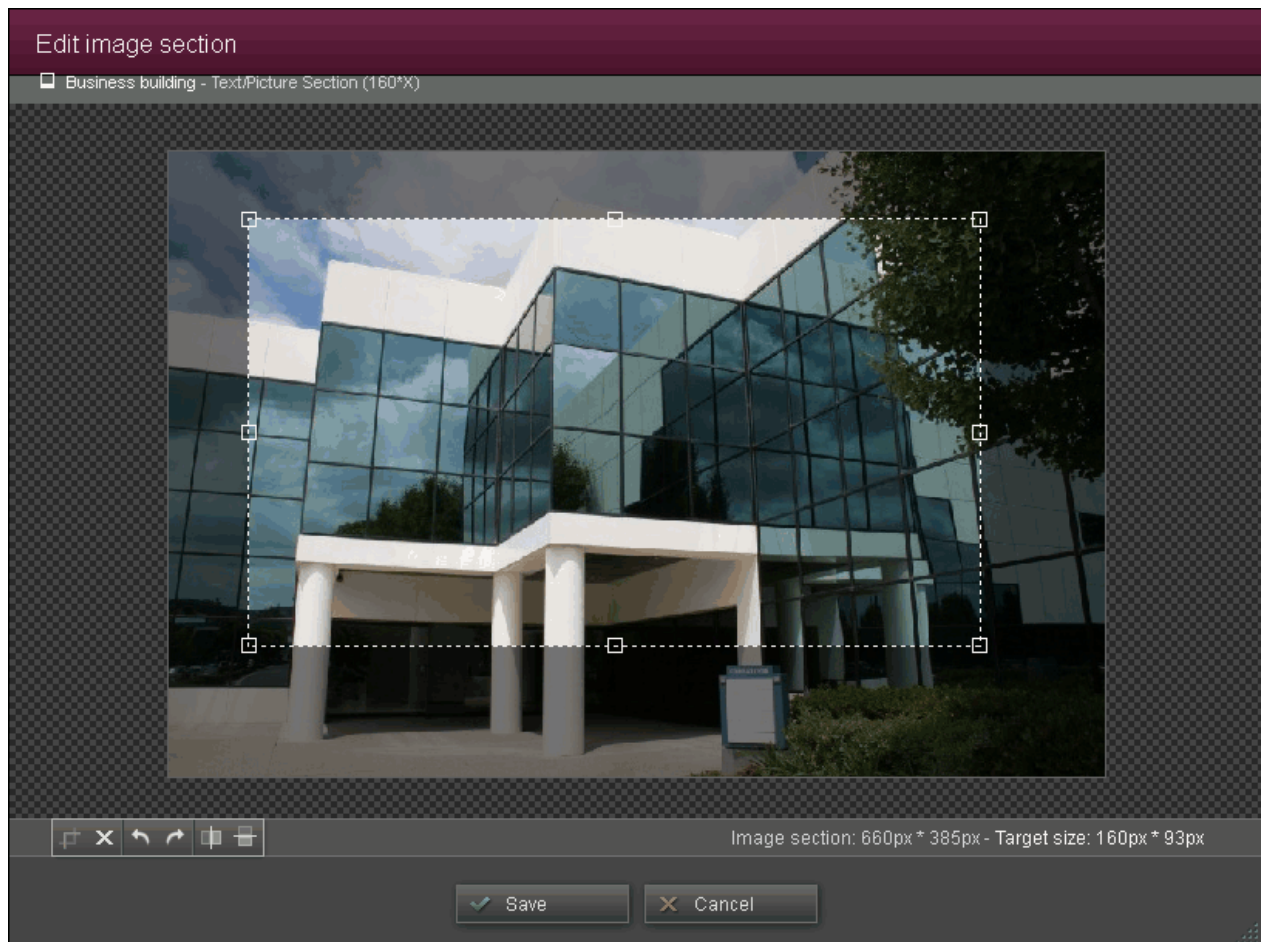
4.2.3 Edit crop image

In this dialog, the display for the selected image can be edited. The original image, stored in the project, is unaffected by this.

If an image is larger than the target resolution, then a fitting cutout of the image can be selected by selecting an area of the image.

By clicking on the frame and dragging, it can be moved within the image. The size of the frame can be changed with the dragger.

To work with images in general, see also the page on [Working with media](#) (Chapter 4.4, page 109).



Icons for editing the image



By clicking on this icon, a frame to select a fitting section of the image appears. This frame is usually shown centered. The image area outside the frame has a gray background.

If the image is already edited, the frame is shown in the size and in the location where it was previously saved.



Using this icon, the frame for selecting a section of the image is removed.



Using this icon, the image can be turned 90° to the left. The selection area has to be moved into the image or made smaller as needed, so that the selection can be taken over.



Using this icon, the image can be turned 90° to the right. The selection frame has to be moved into the image or made smaller, as needed, so that the selection can be taken over.



Using this icon, the image can be flipped horizontally.



Using this icon, the image can be flipped vertically.

Information on the image

Via the image shown, the name of the original image and the name for this section image variant used are shown.



- ! Changes to an image variant lead to all pages on which the image is used in the same variant likewise showing the changed image variant.

Image section: This pixel dimension indicates the current size of the frame. If a smaller section is selected than the target size prescribes, a warning appears. In this case, there can be loss of quality, because the image is automatically scaled larger by the system. If a larger section than the target size is selected, then the image is automatically scaled down by the system to the resolution size.

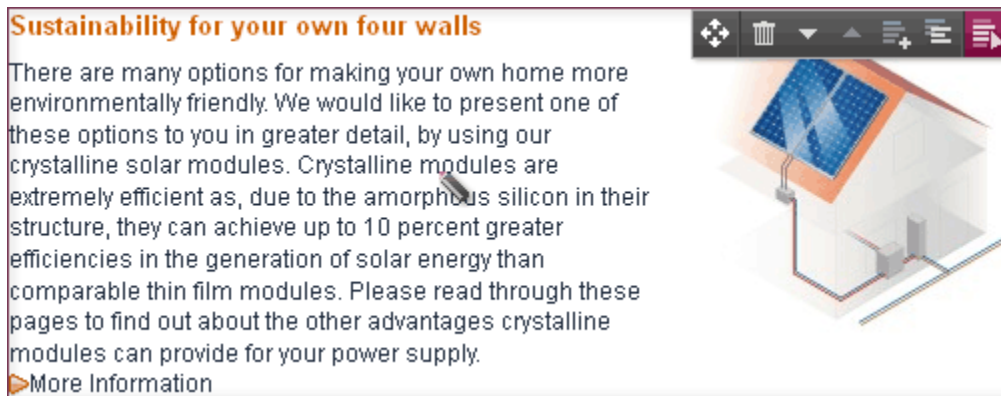
Target size: These pixel dimensions indicate the size of the resolution defined by the project developer.

Via the **Save** button, the image is saved in the current editing state and the dialog closes. Another section can be selected later as needed.



4.3 Creating and editing sections

Hovering the mouse pointer over the preview page displays a frame and icons where sections can be edited or created from scratch.



Editing options for a section

Icons that can be used for editing the selected section are located on the upper edge of the frame.



Rule violations Depending on the specific configuration of the project so-called “rule violations” can be displayed by using this icon. See also [Editing content – Rule violations](#) (Chapter 4.2.1.3, page 94).



Move: A section can be moved to another position on the current page using this icon. When using multi-column layouts, it may not always be possible to move sections to another column.



Delete: The selected section is deleted without a confirmation prompt using this icon.



Move up: The selected section is moved upward by one position using icon.



Move down: The selected section is moved downward by one position using icon.



New section: A new section is added after the selected section on the current page using this icon. If available, a list with all existing section master copies and all of the section templates available on the page is shown for this. This selection can be limited by using the search field.



Duplicate section: A copy of the selected section is created and added in front of the selected section on the current page by using this icon.



Use as master: You can create a master copy of the selected section by using this icon. Sections which are marked to be a master copy can be used for creating new sections.



No longer use a master copy: Use this icon to the withdraw the marking as master copy.



Edit metadata: A [dialog for editing metadata](#) (Chapter 4.2.1.2, page 89) opens by using this icon. Whether the function is available and which metadata can be edited depends on the project developer's specifications.

Metadata is additional information about an element (page, section, media file, etc.) that can be saved, but which is not necessary for the person viewing the page. This way, for instance, the last changed date for a page or the last editor of a page can be saved.





Edit: An **edit window** (Chapter 4.2.1, page 86) with all of the input elements from the selected section opens by using this icon.



Edit section reference: This icon appears in place of the original “Edit” icon if the object involved is a reference for another section. These kinds of “section references” can be created only in FirstSpirit JavaClient. Using this “Edit” icon, an **edit window** (Chapter 4.2.1, page 86) opens with all of the input elements from the selected section.

! Changes made to this kind of section reference have an effect on other pages or in other sections.

Editing an individual input element


Depending on the input element type and configuration, an individual input element can be edited instead of the entire section, and this can even be done in a simple window with reduced functionality if necessary. Hovering the mouse pointer over an input field for a moment changes the mouse pointer into a pencil.

The input field has to have been configured by the template developer accordingly to do this. This is only possible for the following input elements:

- **Single-line text entry (CMS_INPUT_TEXT)** (Chapter 4.6.1, page 122)
- **Multi-line text entry (CMS_INPUT_TEXTAREA)** (Chapter 4.6.2, page 122)
- **Rich text editor (CMS_INPUT_DOM)** (Chapter 4.6.3, page 123)
- **Rich text editor for tables (CMS_INPUT_DOMTABLE)** (Chapter 4.6.4, page 128)
- **Date and time (CMS_INPUT_DATE)** (Chapter 4.6.10, page 152)
- **Numbers (CMS_INPUT_NUMBER)** (Chapter 4.6.9, page 151)
- **Reference selection (FS_REFERENCE)** (Chapter 4.6.5, page 131)






Edit input element: The content of the selected input element can be opened for editing in a simple window by Ctrl-clicking (clicking while holding the **Ctrl** key). If text has been highlighted on the page and the  icon was clicked for this text, the highlighting is applied (to the extent it can be) to the window that opens.


Depending on the input element type, only the following are possible in this mode:


- Text entries,
- Text deletions,
- Line breaks
- Reference selections

In addition, using a context menu:


- Existing formatting can be removed
- Existing links can be edited or removed

No new formatting or links can be made. In order to add links and formatting, the view has to be changed to the edit window ( icon).

 Content has been entered or modified. The changes have to be saved by clicking on this icon, then the window closes.

 No changes have been made.

 Closes the window. Changes made to content are lost.

 Opens the **edit window** (Chapter 4.2.1, page 86) with the selected input element from the section where the current content is located. Even changes made in this window are applied.



4.4 Working with media

Following functions can be proceeded concerning media:

- **Upload media into the project** (Chapter 4.4, page 109)
- **Select and use in the project available media** (Chapter 4.4, page 110)
- **Edit image sections** (Chapter 4.4, page 110)
- **Replace a medium on a single page** (Chapter 4.4, page 111)
- **Replace a medium globally on all pages of a project** (Chapter 4.4, page 112)
- **Release media** (Chapter 4.4, page 112)
- **Download media** (Chapter 4.4, page 112)
- **Remove a medium from a page** (Chapter 4.4, page 112)
- **Remove a medium globally from the project** (Chapter 4.4, page 113)

Uploading media

Media can only be used on the website (e.g. displaying an image or offering a file for download) if they have been uploaded to the project.

Media can be uploaded to WebClient at the following points:

- Using the **Media – New – Upload medium** (Chapter 2.4.1, page 28) menu function
Using this menu function, it is possible to upload media in a centralized location and independently of the usage on the page.
- Using **input elements** (Chapter 4.6, page 119)
It is only possible to upload within sections and pages with a few types of input elements (for example the input element for **reference selection** (Chapter 4.6.5, page 131)) and these types also have to be configured accordingly.



! Depending on the project configuration from the project developer, uploading media can be restricted to specific file sizes and/or formats. In this case, the following note is displayed when activating the “Finish” button:




The medium upload was rejected.
and the medium is not uploaded.

Selecting and using media

Media can only be used at the points on the website that the project developer has provided for them and these are:

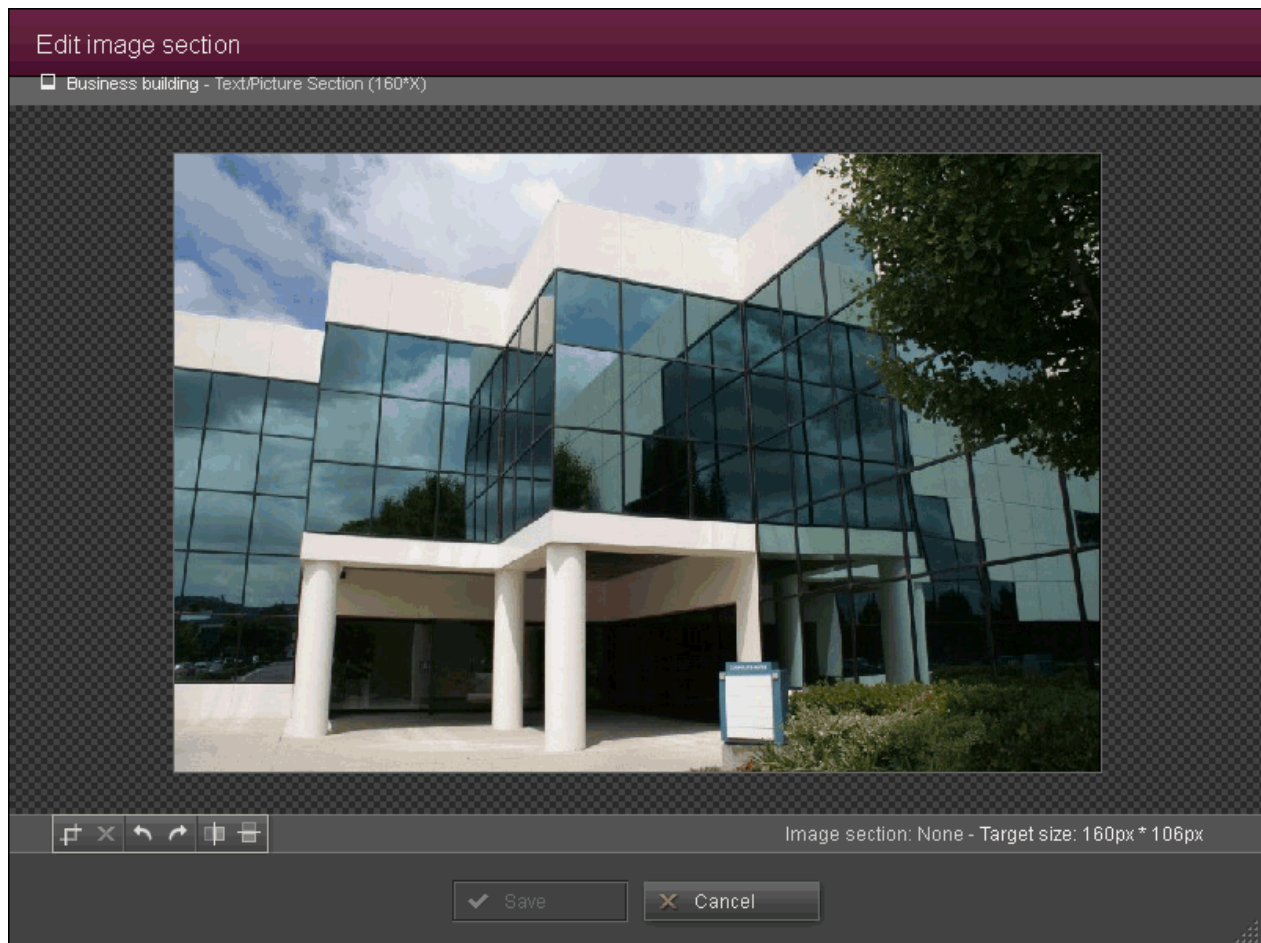
- A **reference selection** (Chapter 4.6.5, page 133) input element ( or  icons)
- An **image link** (Chapter 4.6.6, page 134)

Edit image section

If on a page only the section of a referenced image is to be displayed, you can use the icon  in the bottom right corner of the referenced image. This function is only available if the template developer has allowed this.

The desired section can be defined by means of the dialog which will open.

The original image will not be modified by using this function, but modifications at an image will make appear this modified image on all pages on which the image is used in the same variant. See also page **Edit crop image** (Chapter 4.2.3, page 102).




Replacing a medium on a page

If a medium is already present on a page is to be replaced with another, this is only possible using the corresponding input element that was used to select the medium previously.

The easiest way of doing this is by clicking on the image together while pressing the **Ctrl** key. Then the [window for editing single input elements](#) (Chapter 4.3, page 107) opens. This can be used to select another medium. Likewise, an existing reference to a medium can easily be deleted here (see [Removing a medium from a page](#) (Chapter 4.4, page 112)).


If the input element has been configured by the template developer accordingly, media can be replaced using drag and drop as well, such as from the report area onto an existing image.



Alternatively, the section or page containing the medium to be replaced can be opened (the  icon in the frame belonging to the medium). See the [Sections](#) (Chapter 4.3, page 105) or [Page](#) (Chapter 4.1, page 80) page.

Globally replacing a medium in the project

If a medium already in the project that may already be in use is to be globally replaced with another medium, this is possible using

- the [Media – Edit](#) (Chapter 2.4.2, page 32) function or
- the report function  (see page [Search](#) (Chapter 3.2, page 44))

A medium replaced using one of this functions is replaced by the new one simultaneously at **all** points where it is already being used (“referenced”).

Releasing media

If a project is being worked on with releases, each medium uploaded to the project and to be used on the generated website later on has to be released.



This is only possible using a special workflow, it is not possible using the [standard release workflow](#) (Chapter 3.4.2, page 54). See also section [Project specific workflows](#) (Chapter 3.4.2, page 61)

Download media

You can download media using the icon  in the [report area](#) (Chapter 3.2, page 44).

Removing a medium from a page

If a medium embedded on a page is to be removed from the page, this is only possible via the corresponding input element that was used to select the medium previously.

To do so, the section or page where the medium is located must first be opened ( icon). In the subsequent [edit window](#) (Chapter 4.2.1, page 86), the reference to the medium can be removed using the  icon. Then, after saving, the medium no longer appears on the page; however, it continues to be present in the project and can be selected at a later time.



Removing media from the project

A medium can be permanently deleted from a project only using a special workflow or, of course, it can also be removed using FirstSpirit JavaClient.

Also refer to the [Deleting content](#) (Chapter 4.7, page 163) page.



4.5 Working with data records

For content that was captured and can be displayed well, FirstSpirit offers an additional, important option for maintenance: the data records (see also: [Content that can be re-used](#) (Chapter 4.1, page 81)).

Data records enable another editing and use of content on the website as sections and pages.

In this way, for example, data records of a type (the data all come from the same [content source](#) (Chapter 4.1, page 83)) which are created by the editor are automatically distributed on the desired page. And, according to the criteria defined by the project developer, such as products according to category, press releases according to a date and timeframe, contact addresses according to countries or cities, etc.

Entry of content in data records is, in this, nearly identical to the entry via sections or pages. Certainly, the use or output is different from the use of “normal” sections and pages:

Content entered in *Sections* can be freely positioned by the editor, within certain specifications. In other words, the order and appearance of the sections of a page are variable.

The use of *Data records* is different: Already during project development, it is established where and how the data records are displayed on the website. The content administration for this purpose is frequently done elsewhere in the project.

In this way, it is, for example, possible for the project developer to limit the number of data records shown on a page. With that, overview and detail pages of data records can be created.

This is to be explained more closely based on the press release in the “Mithras Energy” demo project included as standard:

Overview view

Using the “Press - Press releases” menu item, the press releases are shown in an overview.

- The view was limited to three entries per page by the project developer. Through this, the overview is distributed across multiple pages.
- With the buttons **Forward** and **Back**, you can page through the individual overview pages.



- Via the page numbers in the center, a page can also be queried directly.
- Only a text excerpt, called a “teaser”, is shown.
- The latest entry is always shown first.

Press releases

◀ Back 1 | 2 | 3 Next ▶

20.01.2012 ⊕ ⊞ ⊞

New product range

Thin film modules are gaining ground

The thin film modules in our new product range are particularly recommended for highly fluctuating weather conditions. Whether in high temperatures or diffuse light conditions, the modules have a consistently uniform production capacity. The amorphous silicon layer enables efficiencies of around 20 % to be achieved as, among other things, light soaking effects are prevented. ▶

18.01.2012

Solar diversity

Widespread use of mono-crystalline modules

Mono-crystalline modules are the so-called all-rounders of the solar industry. Due to their compact design and high output, these modules are optimally suitable for both PV systems for residential use, large systems on pitched roofs or even for mobile use. The anodised housing frame is reinforced and, together with the special hardened front glass, forms an outstanding protection unit for extreme weather conditions. ▶

Detail view

By simply clicking on a press release in the overview, you are switched to the detail view; in other words, now all information on the selected press release is shown on the page.

- The was limited to one entry per page by the project developer.
- With the buttons **Forward** and **Back**, you can page through the entries in the detail view.
- Using the page number in the center, the detail view of another data record can also be queried directly.
- Using the **Back to the press releases** button, we again leave the detail view.



- The entire text is shown.

Press release

◀ Back to the press releases

◀ Back

| 1 | 2 | 3 | 4 | 5 | 6 |

Next ▶

20.01.2012

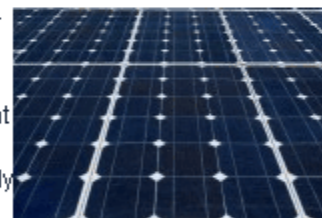
New product range

Thin film modules are gaining ground

The thin film modules in our new product range are particularly recommended for highly fluctuating weather conditions. Whether in high temperatures or diffuse light conditions, the modules have a consistently uniform production capacity. The amorphous silicon layer enables efficiencies of around 20 % to be achieved as, among other things, light soaking effects are prevented.

Certification

Our thin film modules have passed all the necessary tests for certification. The modules were subjected to comprehensive long-term tests over several months: these include accelerated life test series (durability test series) such as heat and cold resistance, heat cycles, moisture and UV resistance as well as mechanical stress tests. All tests were successfully completed.



Advantages for customers

The certification guarantees high resistance and quality of the solar panels produced. The modules achieve a higher price and in many European countries - currently the largest market for thin film modules - they are mandatory for public grant approvals. The certification also guarantees that the tests comply with the latest standards for extended module life and safety; it applies worldwide and is a further part of the fast-growing product and service platform of Mithras Energy.

Find out more about our new thin film modules:

▶ [Products/Thin film modules](#)

Edit data records

If on the overview and on the detail page, different editing options for a selected data record are available to the editor via different icons:



Create: With this icon, a new data record is created.

A **dialog** (Chapter 2.3.2, page 22) will open, containing the input elements which are available for this data record.



Create as copy: With this icon, a copy of the selected data record is created.

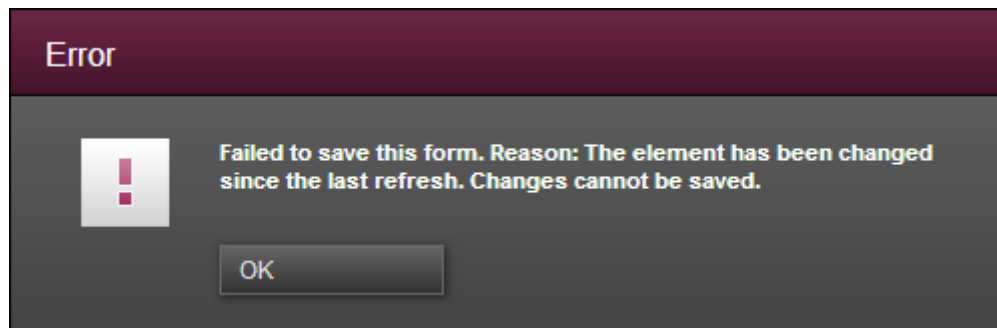
A **dialog** (Chapter 2.3.2, page 22) will open, containing the input elements which are available for this data record, and the data of the selected data record.



Edit: With this icon, an **edit window** (Chapter 4.2.1.1, page 88) with all input components of the selected data record opens.

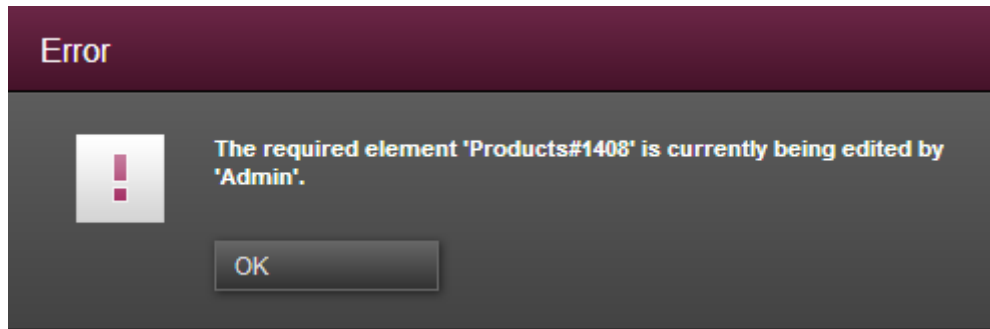
Exclusive working

When editing and saving data records two different methods are possible:



1. Parallel working

By default data records are not blocked against data entry by other users. Thus various modifications can be simultaneously by several users. This can lead to conflicts. In this case, a so called “optimistic lock method” is applied. Only the modifications of the editor who was the first to save are accepted initially. If a second user tries to save his modifications a dialog informs that the elements has been changed. The modifications of the first user will be overwritten if the second user saves despite this.



2. Exclusive working

If exclusive editing of data records is enabled, modifications can be made and saved just by exactly one user. Other users will be informed by a dialog that the element is locked, if they try to edit it.

- ! The option “exclusive working” for data records can only be enabled by the project administrator. By default this option is disabled and a data record can be edited by several users at the same time. Whether this option is enabled or not a user can only recognize by the dialogs.

4.6 Standard input elements

In WebClient 5.0 a selection of input elements (as well known as “input components”) are available, which can be used for being able to put and manage different types of content on the website.

The designations selected below are fundamentally guided by what kind of data can be entered into the respective input element. However, the FirstSpirit designation for the input element, under which the template developer is known, is also specified for each.

The input elements can roughly be divided into the following groups based on functionality:

Functionality	Input element
Entering text and tables	Single-line text (Chapter 4.6.1, page 122) (<i>CMS_INPUT_TEXT</i>)
	Multi-line text (Chapter 4.6.2, page 122) (<i>CMS_INPUT_TEXTAREA</i>)
	Rich text editor (Chapter 4.6.3, page 123) (<i>CMS_INPUT_DOM</i>)
	Rich text editor for tables (Chapter 4.6.3, page 123) (<i>CMS_INPUT_DOMTABLE</i>)
Selecting internal and external references (images, files, pages, links)	Reference selection (Chapter 4.6.5, page 131) (<i>FS_REFERENCE</i>)
	Link input (Chapter 4.6.6, page 134) (<i>CMS_INPUT_LINK</i>)
	Link list (Chapter 4.6.8.3, page 146) (<i>FS_LIST</i>)
Managing multiple sections in a list	Section list (Chapter 4.6.8.3, page 146) (<i>FS_LIST</i>)
Creating and selecting data records	Data record selection (Chapter 4.6.7, page 136) (<i>FS_DATASET</i>)
	Data record list (Chapter 4.6.8.1, page 141)



Functionality	Input element
	(<i>FS_LIST</i>)
Entering numbers and date specifications	Numbers (Chapter 4.6.9, page 151) (<i>CMS_INPUT_NUMBER</i>)
	Date (Chapter 4.6.10, page 152) (<i>CMS_INPUT_DATE</i>)
Entering or selecting values and states (The input elements not only differ in their visual display but in how many values can be selected, as well.)	Check box (Chapter 4.6.11, page 154) (<i>CMS_INPUT_CHECKBOX</i>)
	Combo box (Chapter 4.6.12, page 154) (<i>CMS_INPUT_COMBOBOX</i>)
	Multiple Selection List (Chapter 4.6.13, page 155) (<i>CMS_INPUT_LIST</i>)
	Radio button (Chapter 4.6.14, page 156) (<i>CMS_INPUT_RADIOBUTTON</i>)
	Toggle (Chapter 4.6.15, page 157) (<i>CMS_INPUT_TOGGLE</i>)

The layout and function of individual input element can vary slightly depending on the template developer's specifications:

Functions

In addition to other options, the template developer has the following configuration options available with respect to functionality:

- Limitations:** The selection and entry into individual input elements can be specified by the template developer. This way, for instance, selecting/referencing images from just one specific folder or entering text up to a specific number of characters can be possible, etc. Some input elements are also used only for displaying information; values that already exist then cannot be modified.
- Mandatory input fields:** Mandatory input fields are marked with a border and in color and a note such as "This field cannot be left empty" is displayed. These kinds of fields have to be filled out, otherwise it is not possible to save the content.



- **Default values:** The template developer can define what are known as “default values” for input elements, such as the standard text in an input element for text. This is already present when a new section, page or data record is created with this type of input element. It can be overwritten by separate text. If the text specified by the template developer is not overwritten, it is used in the preview and later on the published website. For information about restrictions and differences of this function in JavaClient please see page *Restrictions (FirstSpirit V5.0 Online Documentation)*, area “WebClient 5.0” / “Restrictions” and page *Default values (FirstSpirit V5.0 Online Documentation)*, area “Template development” / “Forms”.

Likewise, the way the input or referenced content is later **output** on the website depends heavily on the template developer's specifications.

Layout

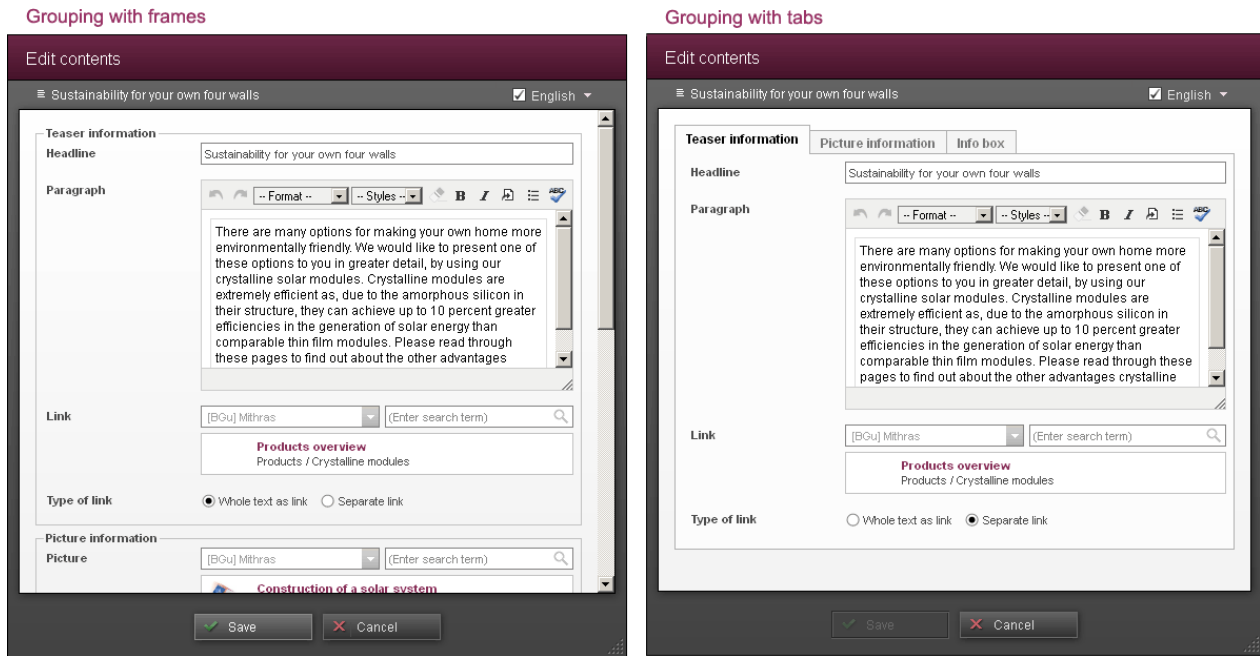
Among other tools, the visual **grouping** of input elements is an important layout tool.

If a section or page contains more than one input element, they can be combined visually into groups, based on function, for instance.

There are two options for display:

- Display **with frames:** For display with frames, associated input elements are identified by a shared frame. Each frame can have its own designation in the process.
- Display **with tabs:** For display on tabs, associated input elements are shown on individual tabs. Each tab can have its own designation in the process.





Section with groupings

4.6.1 Single-line text entry (CMS_INPUT_TEXT)

This input element is intended for single-line text entries, such as headers. Formatting is not selectable here, but instead it is set by the template developer.

Example of single-line text entry:

Headline

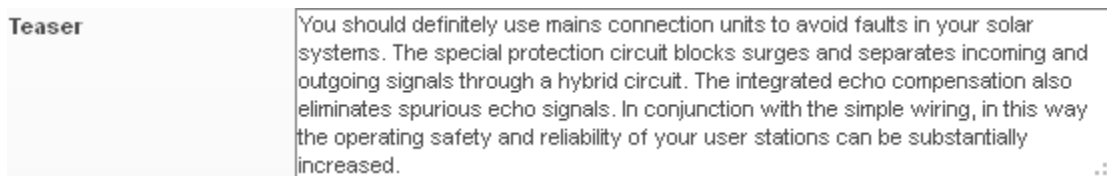
This input element is described in more detail under *TEXT (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.2 Multi-line text entry (CMS_INPUT_TEXTAREA)

The “multi-line text entry” input element can be used for large amounts of entered text that is not intended to be formatted by the editor.



Example of a multi-line text entry:

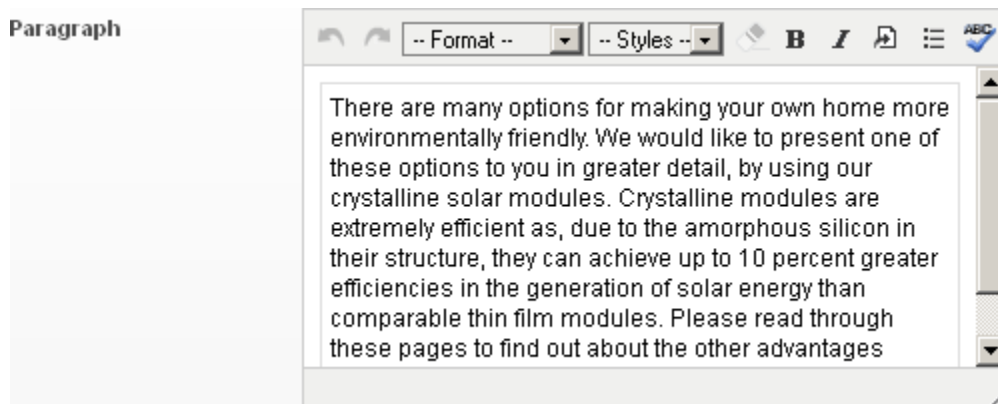


This input element is described in more detail under *TEXTAREA (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.3 Rich text editor (CMS_INPUT_DOM)

The rich text editor is intended for substantial text entries with formatting and link inputs. Whether the following functions or icons are available in the respective rich text editor depends on the configuration used by the template developer.

Example of a rich text editor:



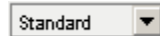
Icon bar for editing content



Undo: Clicking on this icon can undo the last respective work step made in the editor. The icon is only active while the most recent work steps have not yet been saved.




Restore: Clicking on this icon can restore a retracted work step. The icon is only active while the last work steps have not yet been saved.



Section formatting: Predefined formatting can be selected here that is to apply for a (typographical) section within the rich text editor. Sections in a rich text editor are indicated by a frame. The formatting set here can either be removed by selecting different formatting from the drop-down list or by deselecting the formatting (“--Template--”).



Character formatting: In addition to section formatting, predefined formatting to be applied to previously selected text is available in another drop-down list. The formatting set here can be removed again by using the  icon or the “Remove formatting” context menu entry or it can be changed by assigning different formatting from the drop-down list.



Reset formatting: Character formatting (including “bold” and “italics”) is removed by clicking on this icon. Either a string of letters has to be highlighted or the cursor has to be placed within the formatted text to do this. If multiple types of formatting are set in the marked string, then the “innermost” formatting is always removed first.



Bold: Clicking on this icon puts the text previously highlighted in the editor in bold.



Italics: Clicking on this icon puts the text previously highlighted in the editor in italics.



Listing: Sorted and unsorted bullet point lists can be created or removed by clicking on this icon. The [context menu](#) (Chapter 4.6.3, page 126) provides other editing options for lists.



Insert/Modify link: A link (e.g. to another page of the project, a media file or a data record) can be added at the cursor's current position by clicking on this icon. Links are added in the rich text editor in the same way as for the **link input** (Chapter 4.6.6, page 134) input element.

! No images can be displayed in the rich text editor itself. If there is a link from an image, such as for adding it to the body, the text for the link is displayed like linked text.



Spell check: The spell check is activated by clicking on this icon.

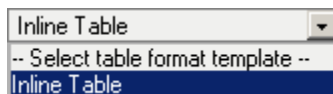
! The spell check for a project has to be configured by the administrator. Installing a module on the server is necessary for this.

All of the unknown words in an input element are marked in red in spell checking mode. "Unknown" words are those that are not present in the language-based dictionary lists that have been configured for the respective project by the administrator. In the process the word's spelling can be unknown, e.g. due to a typo, or the spelling is correct and the word is simply not in the list being used.

The user can call up the **context menu** (Chapter 4.6.3, page 127) by right-clicking on a word marked in red.

The spell check can be turned off by clicking the icon again; words will no longer be marked in red.

Inline tables



--Select table format template--: What is known as a "table format template" can be selected from this drop-down list in a rich text editor configured by the template developer accordingly. This is responsible for the table's layout.



Create table: Tables with the previously selected table format template can be added into the flow of text by clicking on this icon (these are known as “inline tables”).

The functions of an inline table are the same as those for [the rich text editor for tables](#) (Chapter 4.6.4, page 128).



Remove table: The inline table where the cursor is currently located, including all of its content, can be removed again by clicking on this icon.

Changing the size

The rich text editor can be dragged to a bigger or smaller size by using the adjustment handle in the bottom right corner.

Context menu on selected text

Letters and words can be cut or copied and pasted to another spot using the context menu (alternatively: `Ctrl + X`, `Ctrl + C`, `Ctrl + V`).



When working with the Mozilla Firefox web browser, problems can occur when copying, cutting and pasting text into the rich text editor input element. This behavior is not an error in the WebClient but rather is one of the browser's security settings, since Firefox prevents content from being added or changed from the clipboard using JavaScript for security reasons (default setting). Processing such content for the rich text editor is, however, necessary.

The function can be activated using the corresponding configuration of the browser settings (in the file “user.js”); contact your system administrator in this regard.

Context menu for lists

Indent list item: The marked bullet point can be placed one level higher (moved out) using this function.

Outdent list item: The marked bullet point can be placed one level lower (moved in) using this function. This makes it possible to create nested lists.

Edit list properties: A list's type can be changed using this function, e.g. what symbol is used for the bullet point or the starting number or letter for the list.



Context menu for links

Edit link: The input window for the type of link used is opened by calling this function. As a result, settings that have been made can be edited.

Remove link: The selected link is removed by calling this function. The link text remains intact.

Spell check context menu

The following functions are shown in the context menu for the spell check on words marked in red:

Ignore: The spell check is being ignored just for the current instance of the word in the input element. If this function is selected from the context menu this word is no longer marked in red. Other instances in the editor of the same (unknown) word continue to be marked in red. The marked word is not added to the dictionary. If the spell check is activated again the word will be marked again.

Ignore all: The spell check is ignored for all instances of the word in the input element. The word is no longer marked in red, but it is not added to the dictionary. If spell check is started again the word will be marked again.

Add word to: Words marked in red can, depending on the user's permissions and depending on the dictionary's configuration, be added to one or more dictionaries. In the future these words will no longer be marked in red.

In this context, a distinction is made between what are known as “global dictionaries” and “local project dictionaries”:

- Changes to **global** dictionaries can have an effect on all of the projects across the entire server depending on the configuration.
- Changes to **local project** dictionaries only have an effect on the current projects. This means, a word added to project A is once again marked as an unknown word in project B.

Depending on the project configuration and the user's permissions, multiple different dictionaries (or none at all) can be available.



Suggestions: If similar words are found in the dictionary being used, correction suggestions are displayed. Clicking on the desired suggestion can replace the unknown word with the suggestion from the dictionary.

! If additional text is written in the input component after starting the spell check, the spell check is NOT applied to the new text. The check has to be restarted by clicking the button again.

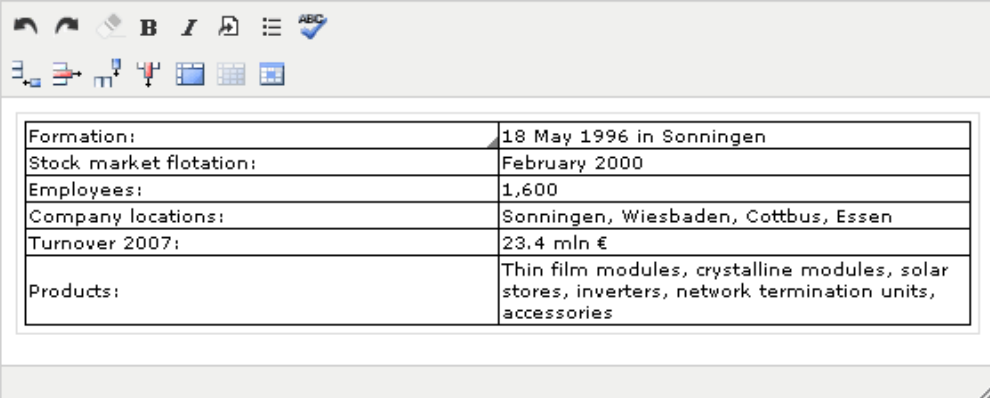
This input element is described in more detail under *DOM (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.4 Rich text editor for tables (CMS_INPUT_DOMTABLE)

The rich text editor for tables allows more expansive text entries with character formatting and link inputs for each cell in the table. In this case, with few exceptions, the editing and formatting options available here are the same as those for the **rich text editor** (Chapter 4.6.3, page 123).

Example of a rich text editor for tables:

Table



Formation:	18 May 1996 in Sonningen
Stock market flotation:	February 2000
Employees:	1,600
Company locations:	Sonningen, Wiesbaden, Cottbus, Essen
Turnover 2007:	23.4 mln €
Products:	Thin film modules, crystalline modules, solar stores, inverters, network termination units, accessories

Icon bar for editing content




Undo: Clicking on this icon can undo the last respective work step made in the editor. The icon is only active while the most recent work steps have not yet been saved.



Restore: Clicking on this icon can restore a retracted work step. The icon is only active while the last work steps have not yet been saved.



Character formatting: Predefined formatting intended to apply to previously highlighted text is available from this drop-down list. The formatting set here can be removed again using the  icon or the “Remove formatting” context menu or it can be changed by assigning different formatting from the drop-down list.



Reset formatting: Character formatting (including “bold” and “italics”) is removed by clicking on this icon. Either a string of letters has to be highlighted or the cursor has to be placed within the formatted text to do this. If multiple types of formatting are set in the marked string, then the “innermost” formatting is always removed first.



Bold: Clicking on this icon puts the text previously highlighted in the editor in bold.



Italics: Clicking on this icon puts the text previously highlighted in the editor in italics.



Listing: Sorted and unsorted bullet point lists can be created or removed by clicking on this icon. The [context menu](#) (Chapter 4.6.3, page 126) provides other editing options for lists.



Insert/change link: A link (e.g. to another page of the project or a data record) can be added at the cursor's current location by clicking on this icon. Links are added in the editor the same way as for the [link input](#) (Chapter 4.6.6, page 134) input element.



Spell check: The spell check is activated by clicking on this icon.



! The spell check for a project has to be configured by the administrator. Installing a module on the server is necessary for this.

All of the unknown words in an input element are marked in red in spell checking mode. “Unknown” words are those that are not present in the language-based dictionary lists that have been configured for the respective project by the administrator. In the process the word's spelling can be unknown, e.g. due to a typo, or the spelling is correct and the word is simply not in the list being used.

The user can call up the **context menu** (Chapter 4.6.3, page 127) by right-clicking on a word marked in red.

The spell check can be turned off by clicking the icon again; words will no longer be marked in red.

Table functions



Insert row: An entire row is added under the highlighted row by clicking on this icon.



Remove row: The entire row where the highlighted cell is located is removed from the table by clicking on this icon.



Insert column: An entire column is added to the right of highlighted column by clicking on this icon.



Remove column: The entire column where the highlighted cell is located is removed from the table by clicking on this icon.



Merge cells: Clicking on this icon merges the marked cells together. The content of the marked cells remains intact in the process.



Unmerge cells: Clicking on this icon separates the merged cells back apart. In the process, the content of the connected cells is retained in the cell on the far left or on top.



Edit cell properties: Clicking on this icon opens an additional dialog window for formatting the content of a cell.

This input element is described in more detail under *DOMTABLE (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.5 Reference selection (FS_REFERENCE)

This input element is used for containing any reference respectively set by the template developer. Items that can be referenced include, for instance:

- Images
- Files
- Pages

Example of a reference to an image:

Picture	Mithras Energy	(Enter search term)
	FirstSpirit™ FirstSpirit FirstSpirit	

The following functions are available:

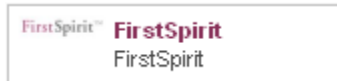
Project selection

[SHö] Mithras WebEdit 5.0 (7)

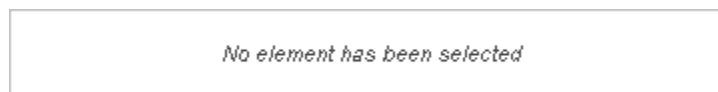


If selecting from other projects (“remote projects”) is possible, a specific project can be selected using the drop-down list.

Reference information



If an element is already selected, it is shown below the search field together with its name, preview image and supplementary text.



If no element has been selected, this is indicated below the search field.

Search field



The name or part of the name of a specific reference can be entered in the search field. Thus the list of elements is reduced to the possible results automatically.

A small list with the best search results is then displayed directly below the search field. If there are more search results than the ones shown, a note is placed below the list **Show more entries...**. Clicking on this note opens the **selection dialog** (Chapter 4.2.2, page 97).

Clicking on the magnifying glass opens the **selection dialog** (Chapter 4.2.2, page 97) where the search can be limited to the storage location, editing time frame and current user.

If another project (“remote project”) has been selected, the search only takes place in the selected project.

The following icons are shown by hovering the mouse pointer below the search field:



Reset selection: The selected element from this display can be removed again by using this icon. Only the reference is removed, the element remains available in the project and can be reselected.



Select element: The **selection dialog** (Chapter 4.2.2, page 98) where a more detailed search for the element to be selected can be made.

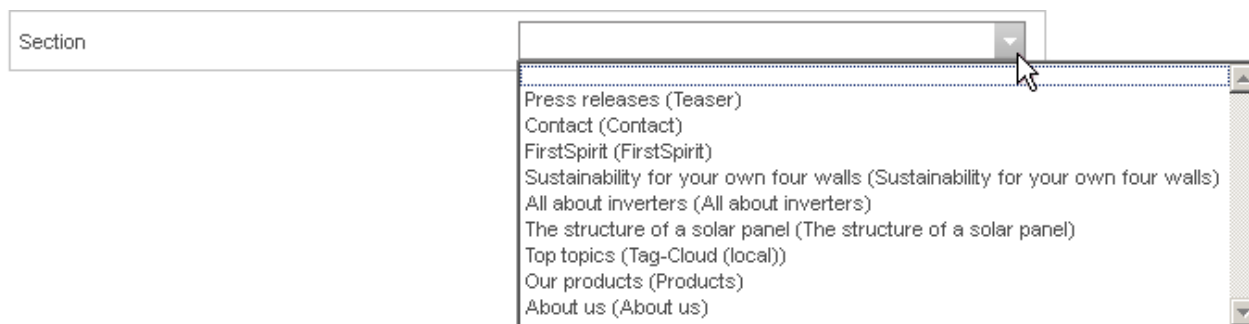


New medium: A new medium can be uploaded to the project and simultaneously be selected at this spot by using this icon (depending on the configuration from the project developer).



New page: A new page can be created and simultaneously be selected at this spot by using this icon (depending on the configuration from the project developer).

Section selection



If a page is selected as a reference, a section from the page can be selected for the corresponding configuration using this drop-down list. This is necessary to, for instance, create anchor links.

This input element is described in detail under *REFERENCE (new) (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.



4.6.6 Link input (CMS_INPUT_LINK)

This input element is provided for entering links directly into a section, a page or embedded into a **rich text editor** (Chapter 4.6.3, page 123).

If there is more than one link input type existing in the project (e.g. for internal or external links), they can be displayed in a drop-down list by clicking in the field or on the “Edit link” icon.

After selecting a type, information for the link to be created can be entered in the next step, such as:

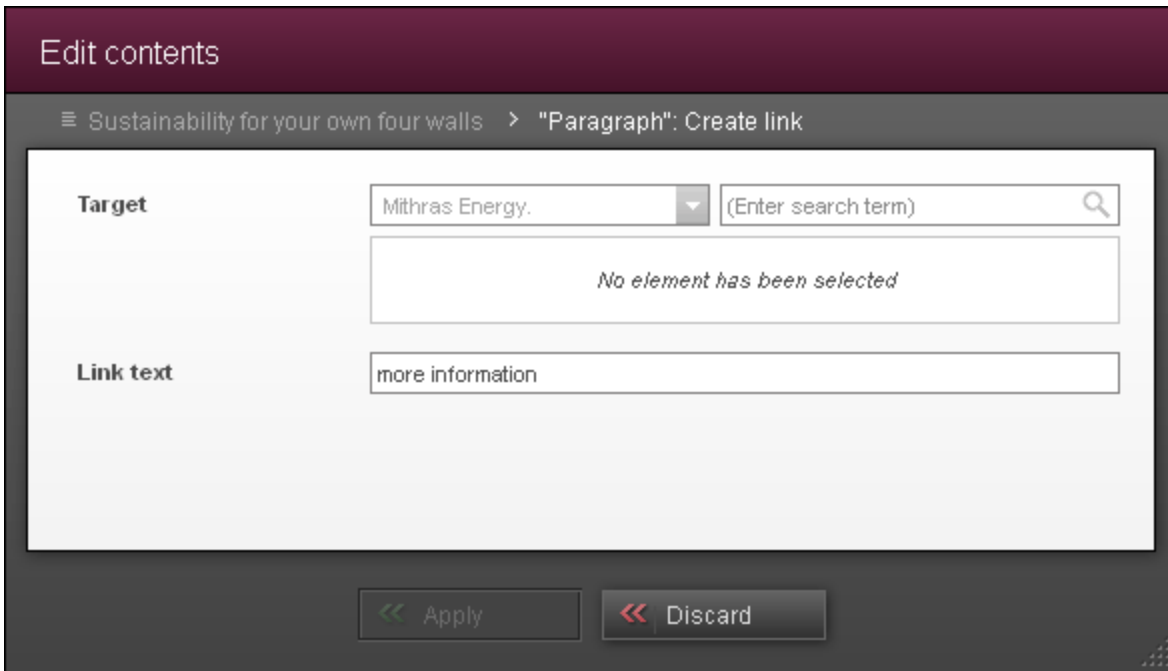
- **Internal link** (on one of the project's pages): Link text, link target (page)
- **External link** (to another website): Link text, link target (URL), should the link open in a new window?
- **Image link** (adding an image): Image to be displayed
- **Database link** (Link to a database): Link text, link target (data record)

In turn, each of these link types contains input elements for entering this information.

The following elements are in the figure, for example:

- **Reference selection** input element: “Target” label, selecting a page from the project/link target
- **Link text** input element: “Link text” label, entering link text





Link input using standard input elements

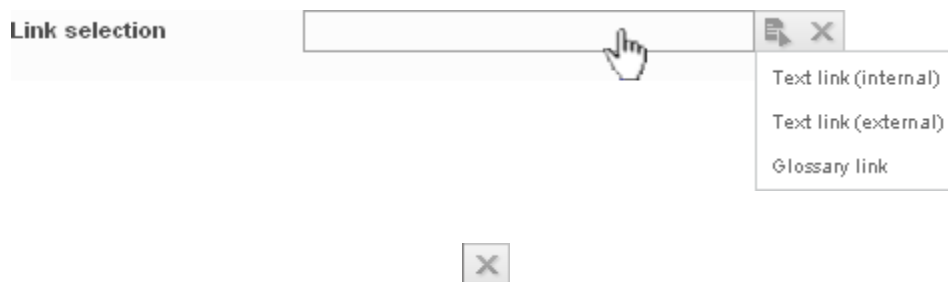


Using this button, entries and changes are applied and the view returns to the original link input.



Using this button, the view returns to the original link input without saving the entries or changes made.

Example of a link input input element:



Remove: Clicking on this icon removes the entered value from the input element.

This input element is described in more detail under *LINK (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area and under *Link templates (FirstSpirit V5.0 Online Documentation)*.

4.6.7 Data record selection (FS_DATASET)

This input element enables – depending on the project developer's specifications – the integration, creation and processing of **data records** (Chapter 4.1, page 81).

Unlike **data record lists** (Chapter 4.6.8.1, page 141) with which only one prescribed **data record type** (Chapter 4.1, page 83) can be selected, via this input element (depending on configuration), you can also chose between different types of data records.

Example for a data record selection:



The following functions are available, depending on the configuration by the project developer:

Select content source

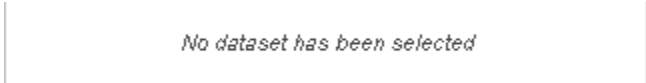


Data records which are based on the data structure are administered in FirstSpirit in so-called “content sources”. Such a content source can, for example, be a contact list (in the example “Contacts”), in which the contact data of employees of a company is compiled and saved. For every data record of this contact data content source, things such as title, first and last name, telephone number, e-mail address, street, house number, city, country and an image can be stored. Depending on specifications of the template developer, all, only some or none of the information are stored for a data record.

Reference information



If a data record is already selected, this is shown within the search field with name, thumbnail and extended text.



If no data record has yet been selected, then this is shown below the search field.

Search field



If an available data record has already been selected, then contents of the data record can be searched for via the search field. Only data records of the selected type are searched.

Directly below the search field, a small list with the best search results is shown. If more search results than the ones shown are available, the note **Show more entries...** is located below the list. By clicking on this note, the **Selection dialog** (Chapter 4.2.2, page 97) opens.

By clicking on the magnifying glass, the **Selection dialog** (Chapter 4.2.2, page 97) likewise opens, in which the data record can be searched for in more detail.

If the mouse pointer is held below the search field, then – depending on configuration – the following icons will appear:



Reset selection: The selected element from this display can be removed again by using this icon. Only the reference is removed, the element remains available in the project and can be reselected.



Select data record: Using this icon, a data record can be selected.



Create data record: Using this icon, a new data record can be created (depending on configuration by the project developer) and simultaneously selected at this location.



Edit data record: Using this icon, an already-selected data record can be edited. If no data record is selected in the input element, the icon is inactive.

This input element is described in detail under *DATASET (new)* (*FirstSpirit V5.0 Online Documentation*) in the *Template development / Forms / Input components* area.

4.6.8 Lists (FS_LIST)

This input element enables the selection and list representation of (FirstSpirit) data. Depending on configuration, lists can be created from **data records** (Chapter 4.5, page 114), **sections** (Chapter 4.3, page 105), **links** (Chapter 4.6.6, page 134) or from data from external modules and components. Such a list representation itself serves as a type of table of contents (“section overview”). All content within a list are visible and editable directly.

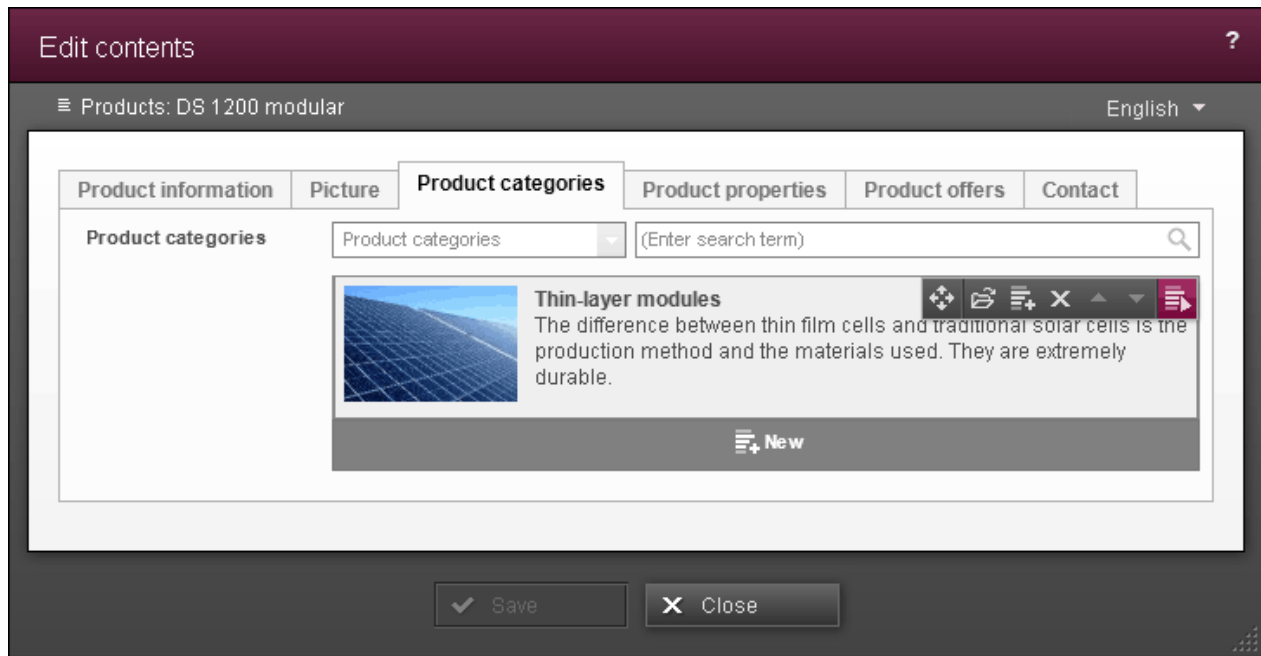
Example for a list:



The edit dialog for lists is only minimally different from the **edit dialog** (Chapter 4.2.1, page 86) for other content. Depending on the type of list, it is, however, possible that the referenced **content source** (Chapter 4.1, page 83) and a search field, as well as a button to add new and

additional list elements, are shown. These points are described more closely based on their occurrence on the subpages.

Edit dialog for lists:



Additional functions are available on the individual elements of a list which can be run via the respective icon. The number of the functions available depends on the configuration of the list, and can therefore vary from list to list. Generally, the following functions are possible:



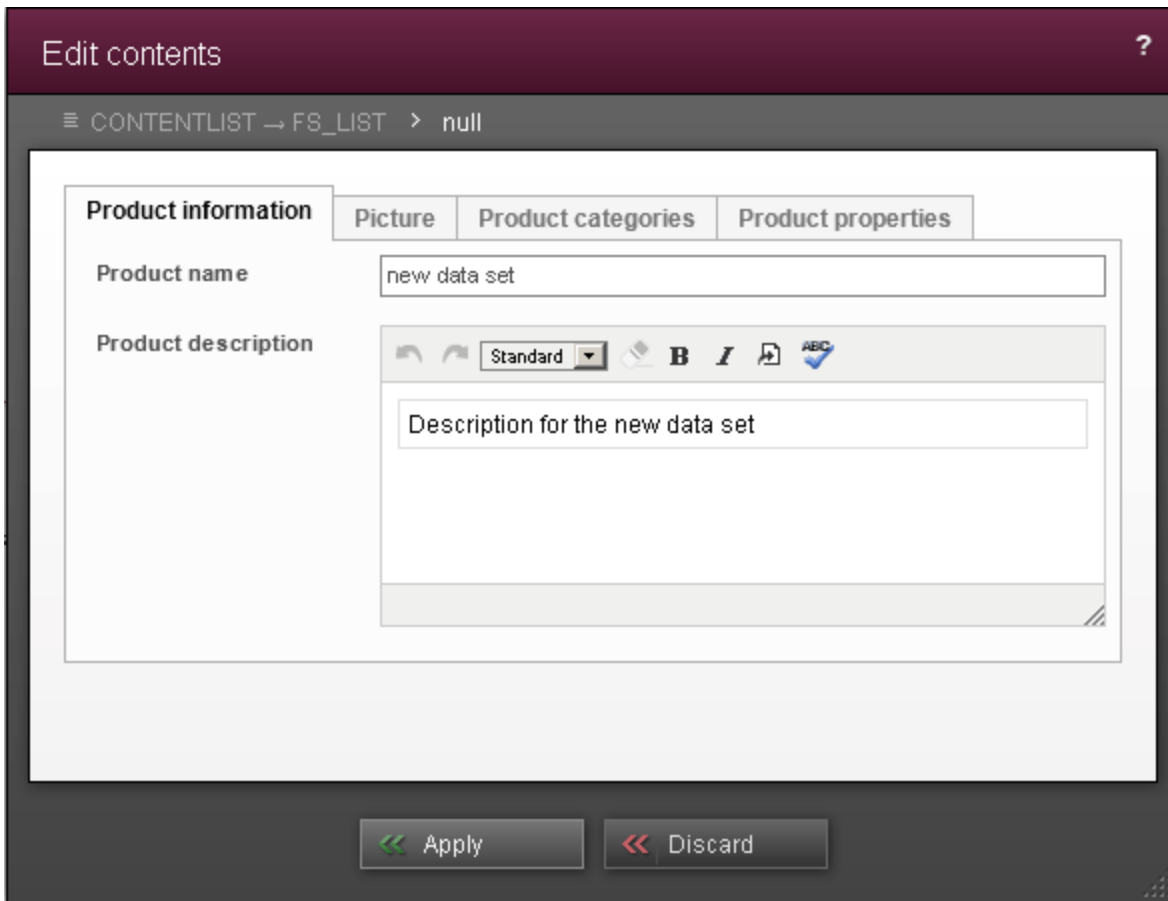
Move: Using this icon, an element can be moved to another position within the list.



Add: This icon opens the **selection dialog** (Chapter 4.2.2, page 97) or the **editing dialog** (Chapter 4.2.1, page 86), depending on the element type (data records, sections or links). By means of them, an entry can be added to the list.



New: The "New" icon provides the option to create a new entry and add it to the list. In case of sections all available section master copies are also provided. Depending on the configuration of the list, different input elements have to be filled for this.



Copy: With the aid of the copy function, a duplicate of an already existing entry can be created. It opens the New dialog, in which all input elements are filled. These can be edited as needed.



Remove: This icon removes the corresponding entry from the list.



Move up: The corresponding entry is shifted one position upward.



Move down: The corresponding entry is shifted one position downward.



Edit: With this icon, it is possible to change the data of the corresponding entry. It opens the entry to the corresponding **editing dialog** (Chapter 4.2.1, page 86), in which the data can be adapted as desired.

This input element can be found under *List (new)* (*Online Documentation FirstSpirit V5.0*) in the *Template development / Forms / Input components* area.

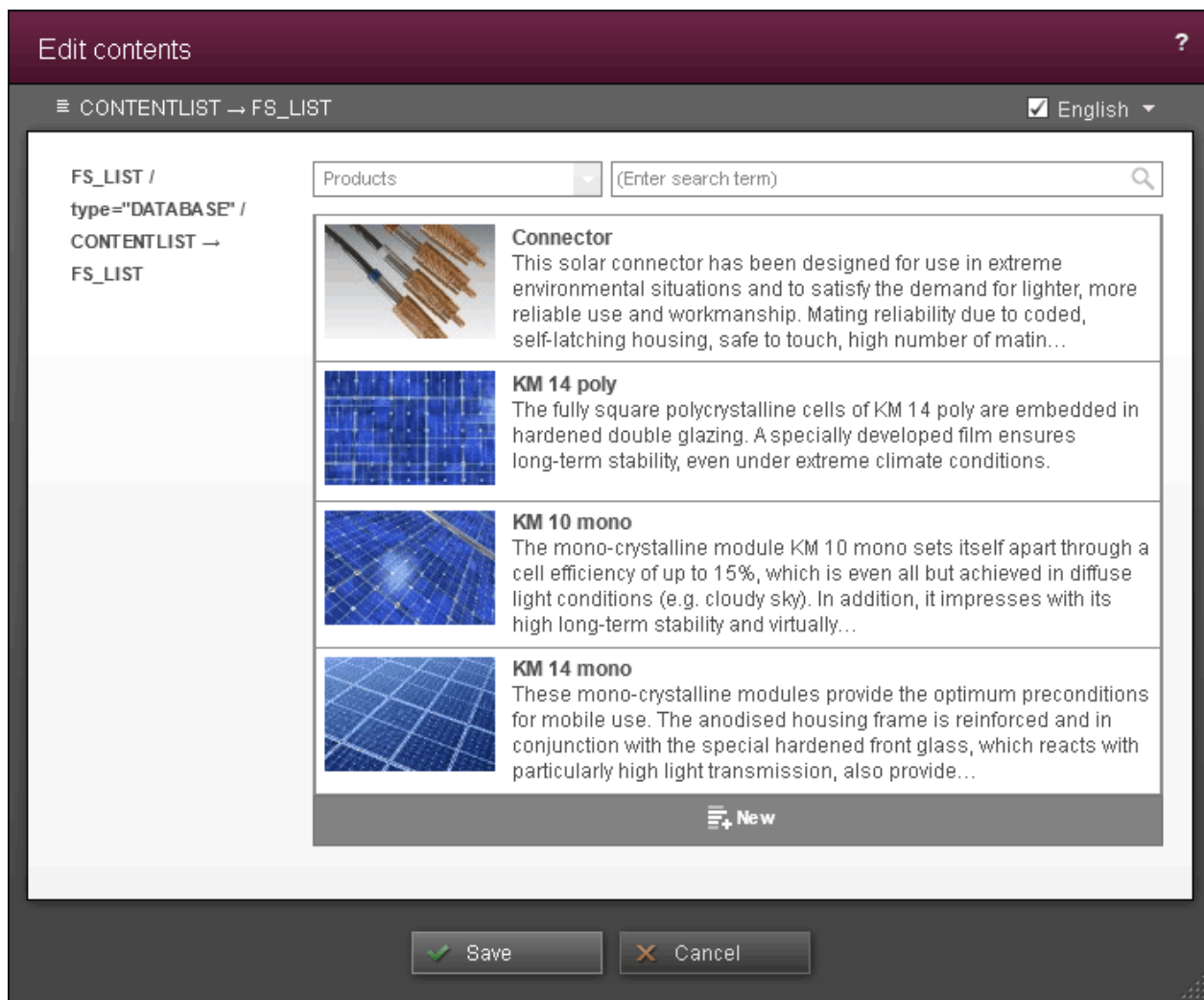
4.6.8.1 Data record lists

(FS_LIST - type: DATABASE)

In data record lists, data records can be selected, created, and maintained, as the name already says. Through this, it is possible for the editor to edit multiple data records within an input element.



Example for a data record list:



Content source display: Data records which are based on a data structure are administered in FirstSpirit in so-called "content sources". Such a **content source** (Chapter 4.1, page 83) can, for example, be a list of products in which the characteristics of different products are measured.

The content source display shows the referenced content sources. The data records shown in the data record list come from this content source. All selection options within the data record list are automatically filtered on this content source. It is not possible to combine data records from various content sources into a data record list.





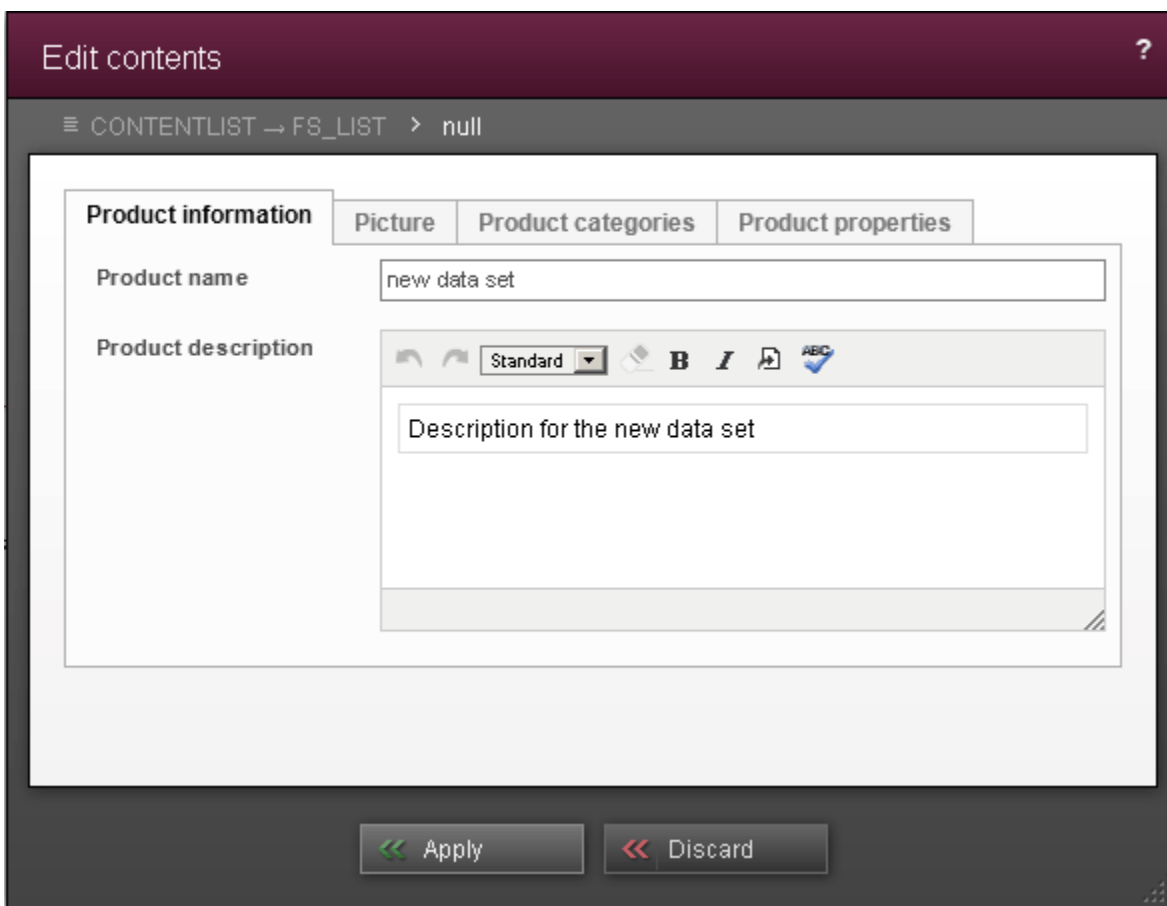
Search field: With the search field, already existing data records can be taken over in the data record list from the open results list with a simple click of the mouse.

A click on the magnifying glass opens the **selection dialog** (Chapter 4.2.2, page 97), in which a refined search can be carried out.



New: Using this button, a new data record can be added to the list. Depending on the configuration, various input elements have to be filled in for it.

Example dialog for the creation of a new data record:



This input element can be found under *List (new) / DATABASE (Online Documentation FirstSpirit V5.0)* in the *Template development / Forms / Input components* area.

4.6.8.2 Image galleries

(FS_LIST - Type: DATABASE, Mediamode)

In image galleries, images with – depending on configuration – an image subtitle and image description can be administrated.

The images of such a gallery can be processed in the same way as the entry of a [data record list](#) (Chapter 4.6.8.1, page 141).

Example for an image gallery:



Picture gallery

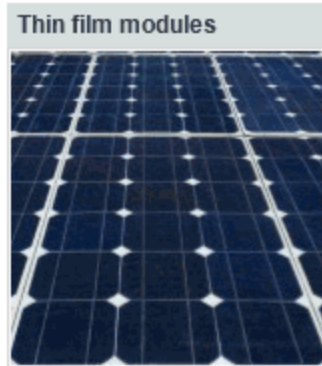
Images of our six product groups are available here.



Set top box



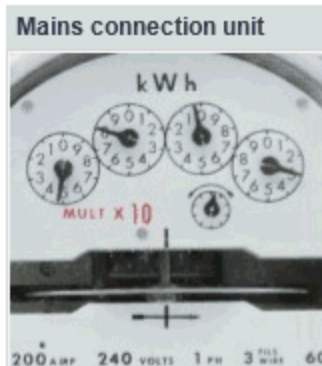
Our inverters have a modular structure and can therefore be used in diverse ways.



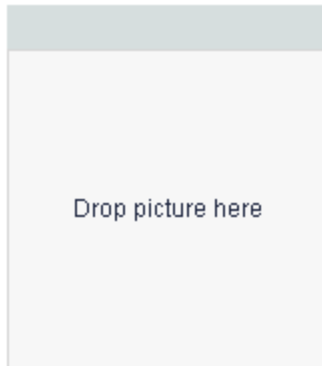
Thin film modules are particularly long-lasting.



A frame



Mains connection units provide safety for photovoltaic systems.



A detailed description of the creation and configuration of image galleries can be found in the Online Documentation for FirstSpirit V5.0 under *List (new) / DATABASE (Online Documentation FirstSpirit V5.0)* in the *Template development / Forms / Input components* area.



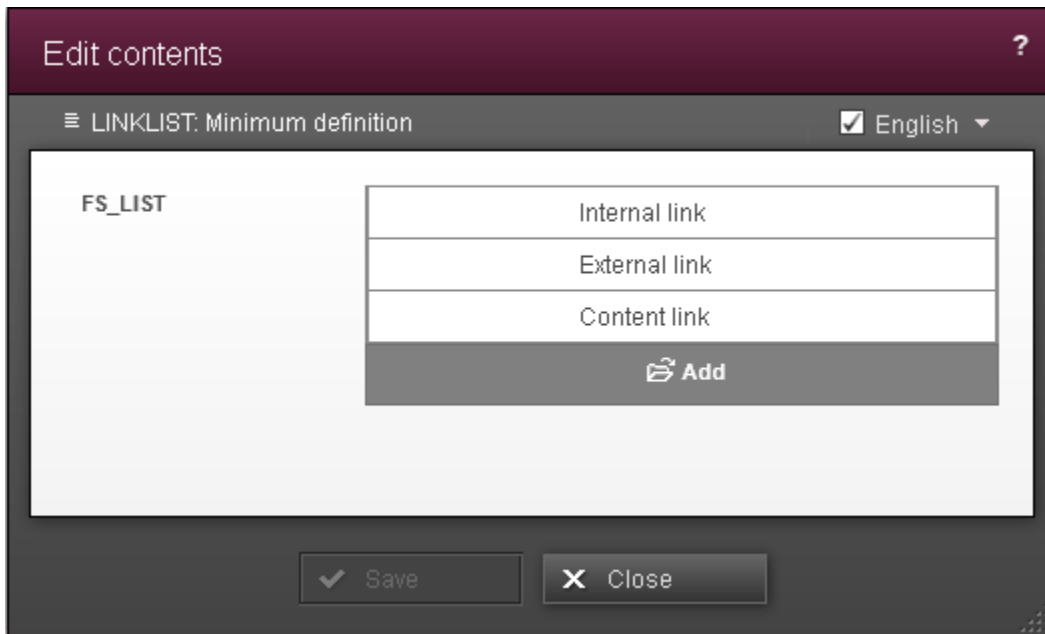
4.6.8.3 Link and section lists

(FS_LIST - Type: INLINE)

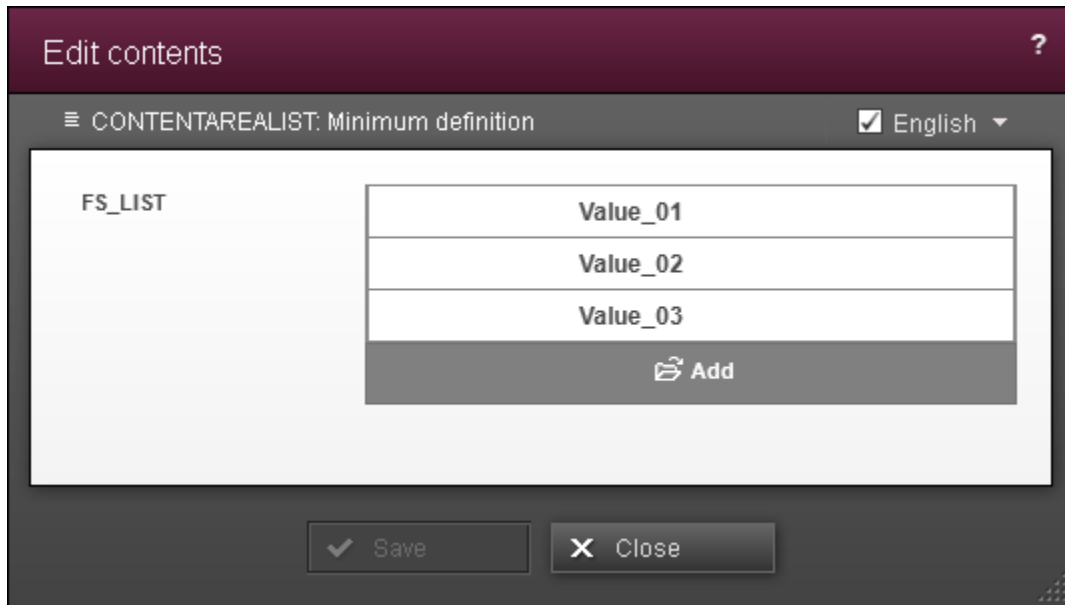
With the aid of links and section lists, compilations of sections or links can be created, edited and administered – within an input element.

In doing so, sections and links of various types can be mixed. Refer also to keyword “Section type” on the [The FirstSpirit operating concept](#) (Chapter 4.1, page 76) page and the [Link input \(CMS_INPUT_LINK\)](#) (Chapter 4.6.6, page 134) page.

Example for a link list:

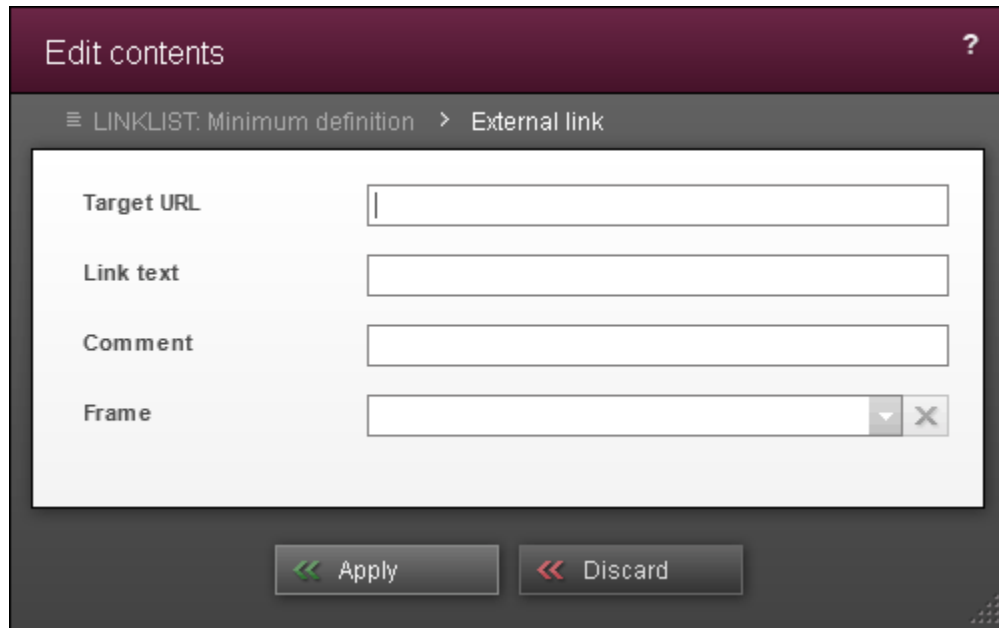


Example for a section list:



Add: With this button, a new link or an additional section can be added to the list. The selection of sections supplies also all available section master copies. Depending on the configuration, different input elements have to be filled. Refer also to page [Editing content](#) (Chapter 4.2.1, page 86).

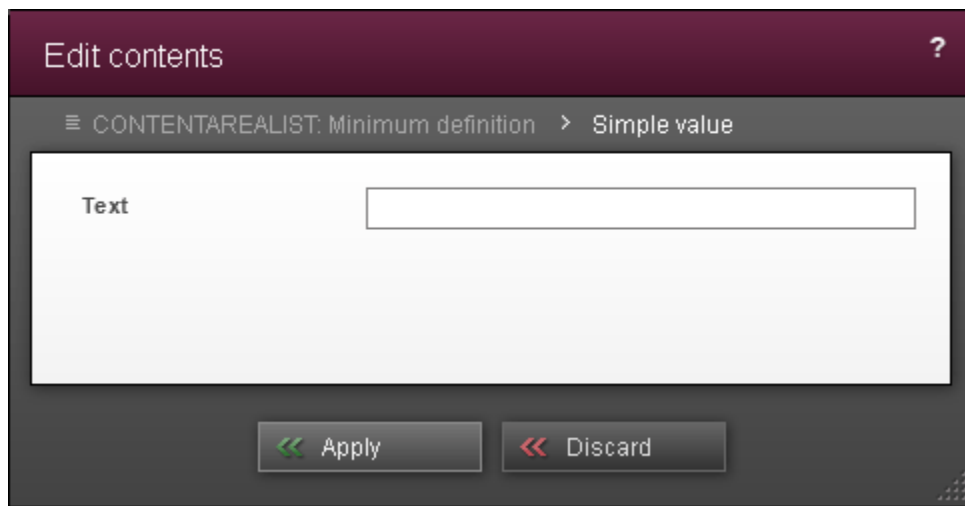
Example for the addition of a new link:



The screenshot shows a dialog box titled "Edit contents" with a question mark icon in the top right corner. Below the title bar, there is a breadcrumb navigation: "LINKLIST: Minimum definition > External link". The main area contains four input fields: "Target URL", "Link text", "Comment", and "Frame". The "Frame" field has a dropdown arrow and a close button (X). At the bottom, there are two buttons: "Apply" (with a green double-left arrow) and "Discard" (with a red double-left arrow).

Adding a new link

Example for adding a new section:



The screenshot shows a dialog box titled "Edit contents" with a question mark icon in the top right corner. Below the title bar, there is a breadcrumb navigation: "CONTENTAREALIST: Minimum definition > Simple value". The main area contains a single input field labeled "Text". At the bottom, there are two buttons: "Apply" (with a green double-left arrow) and "Discard" (with a red double-left arrow).

Adding a new section (which contains only one text input field)

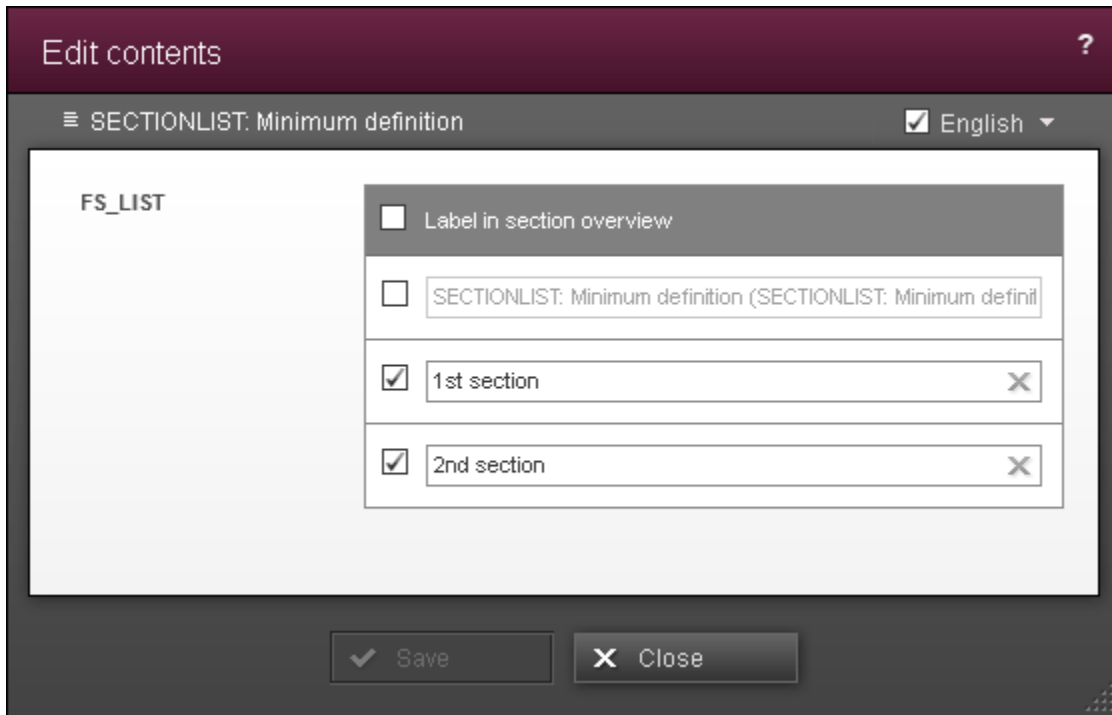
This input element can be found under *List (new) / INLINE (Online Documentation FirstSpirit V5.0)* in the *Template development / Forms / Input components* area.



4.6.8.4 Section overview

In the section overview, a list of all available sections (Chapter 4.1, page 77) on the current page (Chapter 4.1, page 80) is created. The individual sections can be selected and deselected in this list, as well as provided with a label.

Example for a section overview:



The section overview can, for example, be used for a table of contents that is limited to the current page; using this, the individual sections of the page can be accessed conveniently.



Example for use of a section overview:



FirstSpirit

Das Rückgrat Ihrer digitalen Unternehmenskommunikation

Jede Website ist immer eine strukturierte Synthese aus Inhalten, Design und Technik. Mit einem Content Management System (CMS) können Sie diese Elemente gezielt steuern – denn CM Systeme basieren auf der Trennung von Inhalt, Struktur und Design. Damit können Sie vielen Mitarbeitern Ihres Unternehmens die Möglichkeit bieten an der Website zu arbeiten, ohne dass hierfür Programmierkenntnisse erforderlich sind oder die gestalterische Konsistenz der Website aufgeweicht wird.

- Konzept und Design
- Umsetzung mit FirstSpirit
- Backend-Entwicklung
- Frontend-Entwicklung

Unlike the other **lists**, (Chapter 4.6.8, page 138) a section overview cannot be expanded manually by adding a new entry. If, however, a new section is added to the page, this is automatically taken up in the list, and can be selected for the overview there.

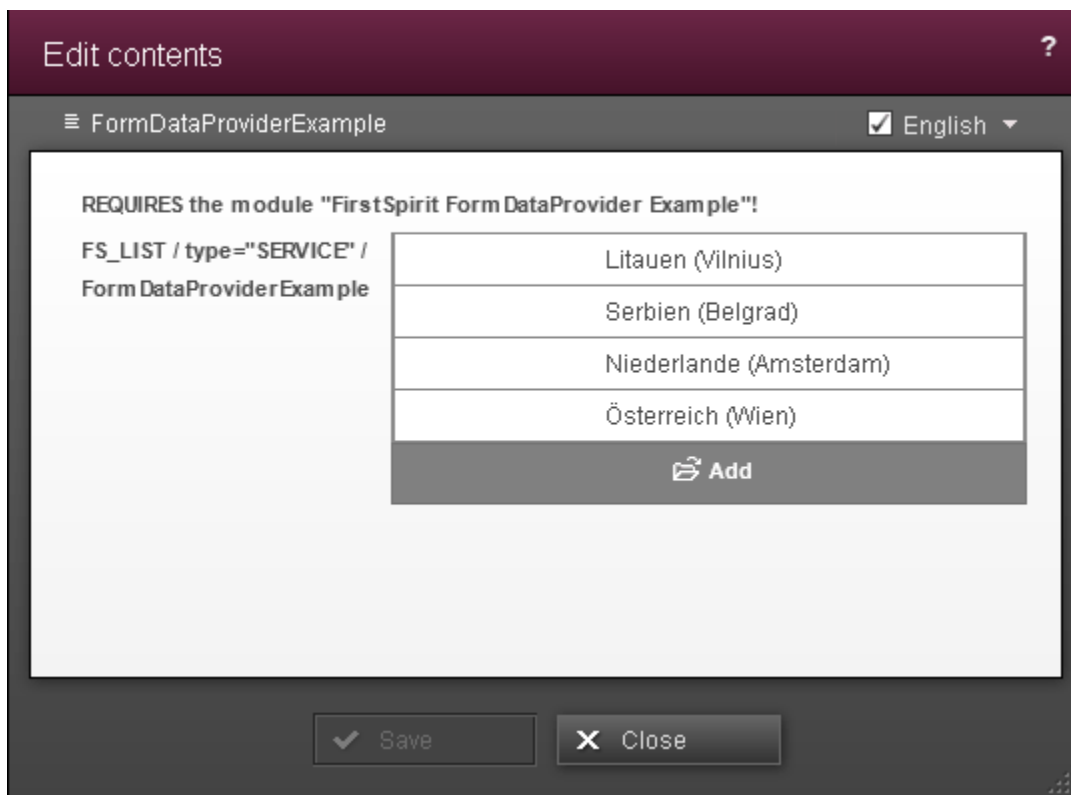
This input element can be found under *List (new) / PAGE (Online Documentation FirstSpirit V5.0)* in the *Template development / Forms / Input components* area.

4.6.8.5 Lists of external data

With this input element, external data (for example, from a module) can be made available in a list.



Example of a foreign data list:



List with data made available from a module.



Add: Using this button, an additional entry can be added to the list. The data input for a new entry depends on the configuration of the external source.

This input element can be found under *List (new) / SERVICE (Online Documentation FirstSpirit V5.0)* in the *Template development / Forms / Input components* area.

4.6.9 Numbers (CMS_INPUT_NUMBER)

The “number” is used for entering numeric values.

In the process, the template developer can set:

- The **value range** the numbers may come from (e.g. “1-100”)



- The **type** that it must be (e.g. whole number or decimal number)

Furthermore, the **display format** for the number in WebClient as well as the output on the website can be specified, e.g. whether a thousands separator is used, etc.

Example of a number input element:

Number of press releases (1-5)	<input type="text" value="2"/>
--------------------------------	--------------------------------

This input element is described in more detail under *NUMBER (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.10 Date and time (CMS_INPUT_DATE)

This input element is provided for entering the date and/or time. The data can either be entered manually or with the help of a calendar/time component.

The format in which the selected date is applied to the input element depends, by default, on the language that WebClient was started in (interface language). For the language “EN” (English) for example, the following format is used:

MMM.d yyyy HH.MM.SS a




For instance, this would be:

Feb 15, 2012 10:59:23 AM

However, this format can be changed by the template developer.

The format for how the date/time information is output on the website is also specified by the template developer.

Example of a date and time input element:

Date	<input type="text" value="Jul 12, 2012 1:45:00 PM"/>		
			



Date selection: Clicking on this icon opens a calendar/time component for selecting a date and/or time.

A date and/or time can be selected in this window. The information is then transferred to the input element in the specified format automatically.

The currently entered date is shown by default when opening the selection window (red border).

Another date can be selected by clicking in the calendar view.


The calendar view can be paged back or forward by one month using the  and  icons.

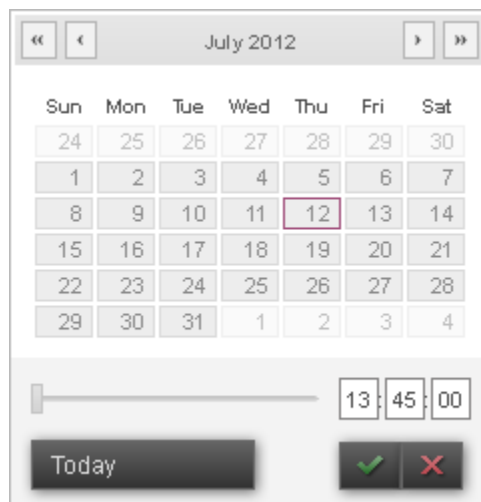
The calendar view can be paged back or forward by one year using the  and  icons.

The time can be manually entered or set via a time bar in the lower area of the selection window.

The date can be reset to the current date using the “Today” button.

The entries can be saved using the  icon. The selection window then closes.

The selection window can be closed without saving entries that have been made by using the  icon.





Remove: Clicking on this icon removes the entered value from the input element.

This input element is described in more detail under *DATE (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.11 Check box (CMS_INPUT_CHECKBOX)

This input field provides an option for selecting values that have been set by the project developer. The user cannot enter content directly.

Using a check box, it is possible to:

- Make **more (or fewer) than one selection** at the same time
- Leave the selection **empty**.

If a box is checked, any previously selected box is **not** unchecked.

On the other hand, selecting exactly one value, for instance, is possible using a **radio button** (Chapter 4.6.14, page 156) or **toggle** (Chapter 4.6.15, page 157) input element.

Example of a check box:



This input element is described in more detail under *CHECKBOX (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.12 Combo box (CMS_INPUT_COMBOBOX)

Using a combo box, the user can:

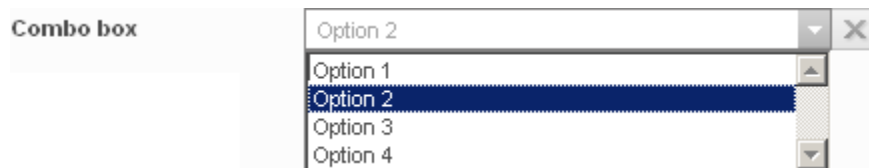
- Select **exactly one** value from a group of values
- Leave the selection **empty**.

Depending on the configuration, the user can enter a **separate value** as well.



! In contrast, for instance, selecting multiple values is possible by using the **check box** (Chapter 4.6.11, page 154) input element.

Example of a combo box:



Selection from the list can be carried by means of the mouse pointer or per arrow keys and .



Remove: Clicking on this icon removes the entered value from the input element.

This input element is described in more detail under *COMBOBOX (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.13 Multiple selection list (CMS_INPUT_LIST)

This input field provides an option for selecting values that have been set by the project developer. The user cannot enter content directly.

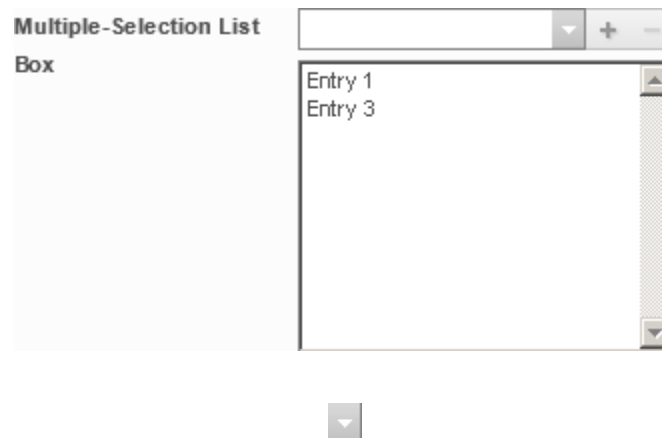
Using a multiple selection list, it is possible to:

- Make **more (or fewer) than one selection** at the same time
- Leave the selection **empty**.

! On the other hand, selecting exactly one value, for instance, is possible using a **radio button** (Chapter 4.6.14, page 156) or **toggle** (Chapter 4.6.15, page 157) input element.

Example of a multiple selection list:





The values / entries provided by the input field can be displayed in the selection list (at the top) using this icon.



Add entry: Use this icon to add the entry which is marked at the moment in the selection list (at the top) to the list (at the bottom).



Remove entry: Use this icon to remove the entry which is marked in the list (at the bottom) at the moment.

This input element is described in more detail under *LIST (FirstSpirit V5.0 Online Documentation)* in the *Template development / Forms / Input components* area.

4.6.14 Radio button (CMS_INPUT_RADIOBUTTON)

This input field provides an option for selecting values that have been set by the project developer. The user cannot enter content directly.

Using radio buttons, the user can

- select **exactly one** value from a group of values.

If one button is activated, the previously selected one is deactivated.



! In contrast, for instance, selecting multiple values is possible by using the **check box** (Chapter 4.6.11, page 154) input element.

Example of a radio button:

Radio button Option 1 Option 2
 Option 3 Option 4

This input element is described in more detail under *RADIOBUTTON* (*FirstSpirit V5.0 Online Documentation*) in the *Template development / Forms / Input components* area.

4.6.15 Toggle (CMS_INPUT_TOGGLE)

This input field provides an option for selecting values that have been set by the project developer. The user cannot enter content directly.

Using a toggle, the user can

- select **between exactly two** specified values (e.g. on/off, right/left).

If one button is activated, the previously selected one is deactivated.

The toggle can be displayed as a **radio button** (Chapter 4.6.14, page 156) or as **1 check box** (Chapter 4.6.11, page 154) in the process.

! In contrast, for instance, selecting multiple values is possible by using the **check box** (Chapter 4.6.11, page 154) input element.

Example of a toggle in the radio button view:

Picture position Left Right

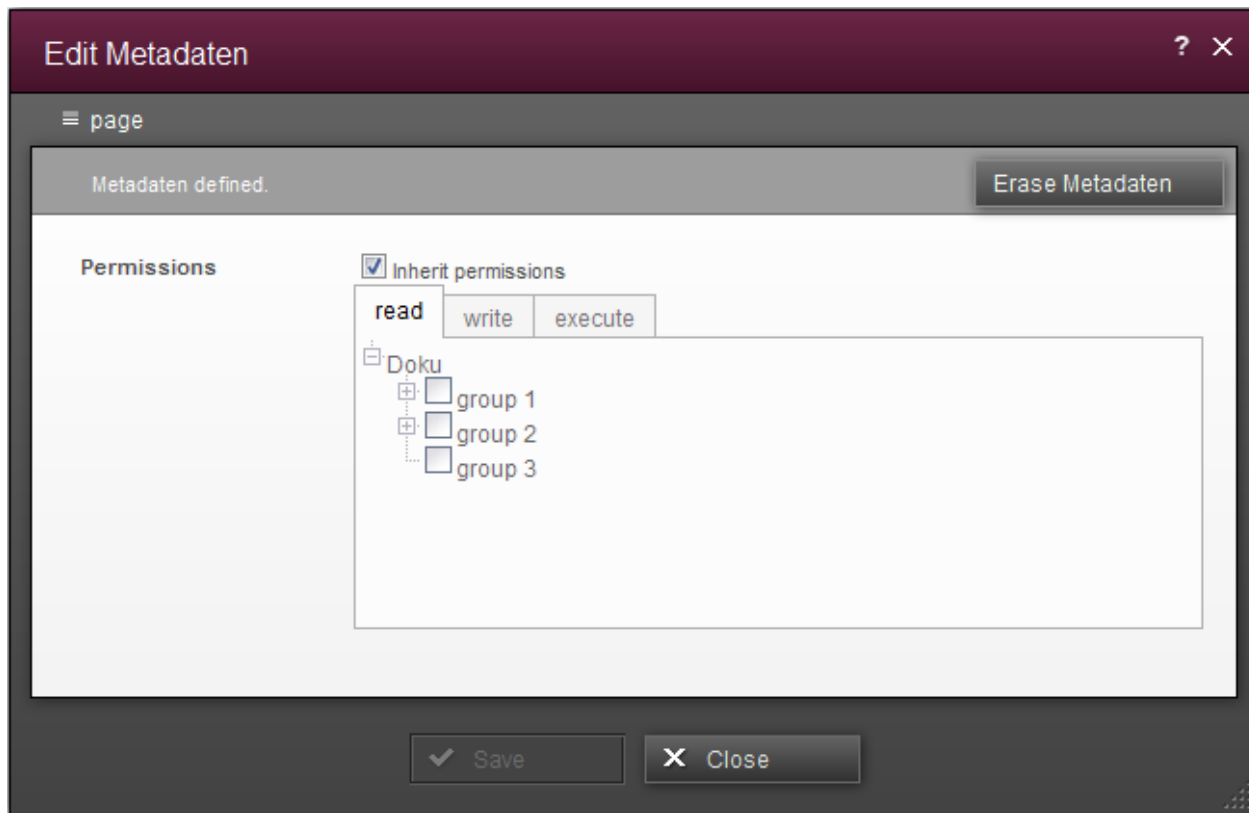
This input element is described in more detail under *TOGGLE* (*FirstSpirit V5.0 Online Documentation*) in the *Template development / Forms / Input components* area.

4.6.16 Definition of permissions (CMS_INPUT_PERMISSION)

This input element allows the definition of user permissions and with this it offers a control of the visibility of content. In contrast to the editorial permissions, which control the operations



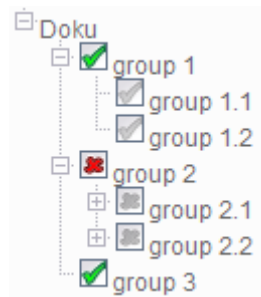
that an editor can run (e.g. create / edit / delete pages), the user permissions apply to the “visitors” of the generated website. For this reason they are used in general with the metadata. The user permissions can be used by using this input element. The evaluation of the permissions takes place inside the project.



- ! The decision, on which objects inside the WebClient metadata can be set and modified, is a task of the project administrator. This can not be done by the editor. The icons to modify the metadata appear in dependence of the context in the contents or media menu or as a EasyEdit icon (see also page [Metadata](#) (Chapter 4.2.1.2, page 89)).



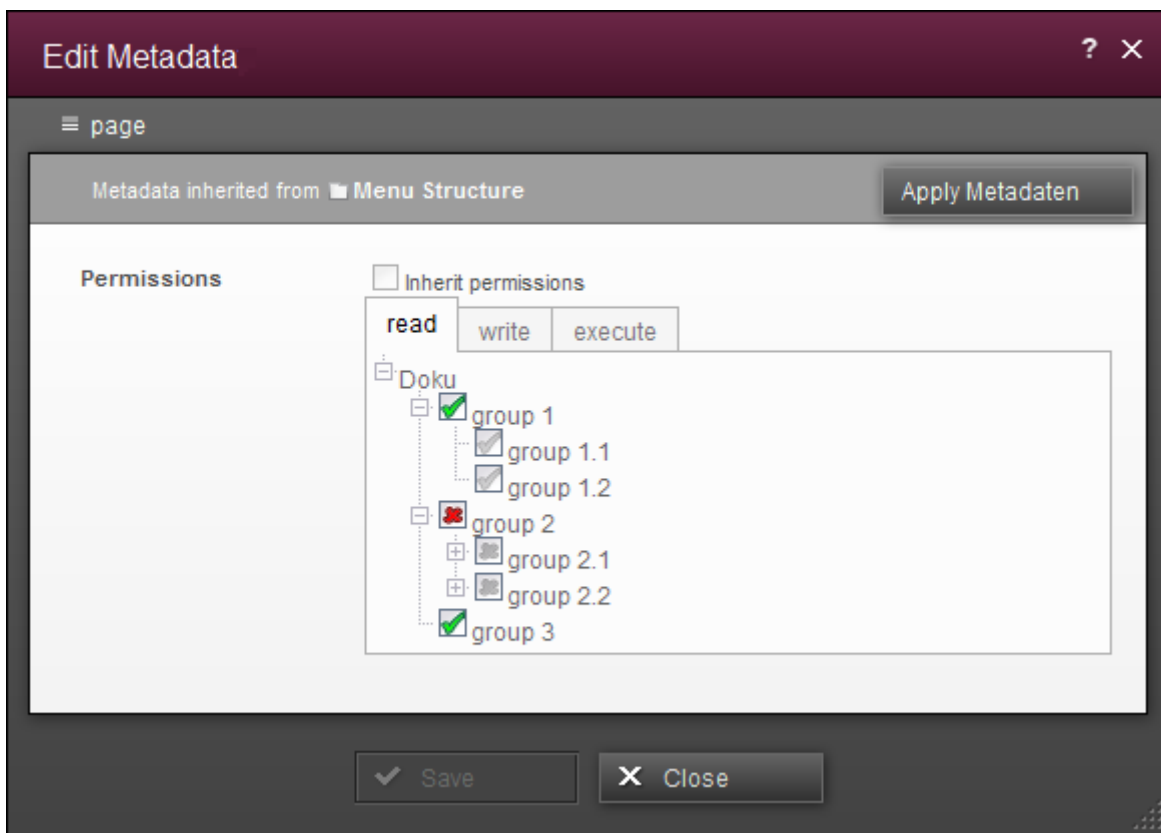
Assigning user permissions



User permissions are usually assigned via groups. The user must be authenticated by the system, before he can be assigned to one of these groups. With the group structure, which can be created with FirstSpirit or which can be taken over from an existing system, the user permissions can be evaluated. This group structure is displayed in a tree view inside the input element.

The icons beside the groups show the user permission of the current group. Colored icons (red or green) correspond to explicitly set permissions. Grey symbols represent permissions which are inherited from a parent node (= a superior group). “group 1” and “group 2” are the parent nodes of “group 1.1” and “group 1.2” or “group 2.1” and “group 2.2” in the illustration.

User permissions can also be inherited from superior FirstSpirit objects. If – for example – user permissions have been defined for a menu item, all pages on a lower level will inherit these permissions. In this case a note will be shown inside the dialog and the user permissions are already defined.



States for groups

The following three states can be defined in the tree view:

- permission is explicitly granted (green tick, see “group 1”)
- permission is explicitly denied (red cross, see “group 2”)
- permission is inherited from the parent node and are either granted or denied depending on the definition on the parent node (grey symbol, see “group 1.1” & “group 2.1”).

The state of the user permissions can be changed by clicking the icon. As the permissions are inherited hierarchically within the subgroups, the grey symbols of the inherited permissions may change in the subtrees too.



Certain nodes are excluded from the definition of user permissions. These groups are displayed without an icon and it is not possible to set user permissions for them.



! The group structure displayed in the input element for user permissions are also displayed project-specific, just as in the tabs of the user permissions input element.

Possible operations for user permissions

The configuration of user permissions allows to personalize web pages, that means the display of the page content can be – depending on the permissions of the current user – fully or partially denied (e. g. for a single section).

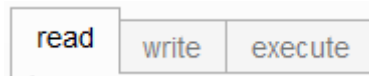
In general user permissions can be interpreted as the “permission to view an object”. However, in some cases “change” or “print” operations are relevant in addition to the “view” option. Therefore, various types of user permissions can be defined.

As the editorial work within WebClient is carried out on a generated page, the editor is therefore simultaneously also a user. So he requires user permissions to run editorial changes.

Via WebClient editors themselves can assign and modify user permissions for groups, and decide for which content or areas of the web page the groups get access (e. g. a “customer area” or an internal intranet of a company) is to be “granted” or “denied”.

! The permissions, which are visible in the tabs of the input element, are defined and evaluated within the project. These are neither user permissions nor editorial permissions of FirstSpirit.

Each of these project-specific permissions, which are to be defined within the input element for permissions, has its own tab (see figure: “read”, “write” and “execute”). So you can define for each operation explicitly, which groups are granted to perform this operation.



Managing user permissions using metadata

In general, the input element for user permissions is maintained via metadata.



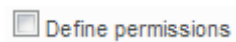
! The decision, on which objects inside the WebClient metadata can be set and modified, and the definition of the editorial permissions is a task of the project administrator.

Depending on the activation by the project administrator it is possible to edit user permissions on the following objects (using metadata):

- menu items
- pages
- sections
- media

The input element is displayed in the respective **editing dialogs** (Chapter 4.2.1.2, page 89) of the respective metadata and the user permissions can be set or edited.

Define user permissions



Editing of user permissions can be activated by means of the checkbox “Define permissions”.

If the checkbox is disabled, the user permissions for the current node have not been defined yet. All displayed user permissions are inherited in this case from a parent node.

By activating the checkbox, the inheritance hierarchy of the permissions will be interrupted and the user permissions can be re-defined for the selected node (and all nodes below it). The inherited permissions are the basis for the new definition.


If no set permissions can be found in a parent node the input element will be empty initially.

! For detailed information how to create and edit metadata in WebClient please see page **Editing contents – Metadata** (Chapter 4.2.1.2, page 89).





4.7 Deleting content

Deleting sections

Sections can be deleted using the  icon (also refer to the [Editing sections](#) (Chapter 4.3, page 105) page in this regard).

Deleting a section can be undone using:

1.  The undo function in the [menu bar](#) (Chapter 2.2, page 16)
2.  The restore function in the [project history](#) (Chapter 3.5, page 63)
3. The “Restore section” action in the [comparison view](#) (Chapter 2.1, page 14)

Deleting menu items

If a menu item is to be deleted from the navigation, it can be reached via the [Content – Edit–Convert menu item to page](#) (Chapter 2.3.4, page 26) menu function, for instance.

After saving, the menu item belonging to the current page is no longer present in the navigation. However, the page continues to remain available in the project and it can be reintegrated into the navigation at a later time as needed.

A special workflow is required if a menu item including its page (i.e.: content) is to be deleted, see the section [Deleting pages, media and data records](#) (Chapter 4.7, page 163)).

Deleting pages, media and data records

A special workflow is required for deleting **pages, media** and **data records**.

Of course, as an alternative, these objects can also be deleted using FirstSpirit JavaClient.

