

Iguana – Management common workflow

1 Introduction

In this document a number of common workflow elements that appear almost everywhere throughout the CMS (Content Management System) are described.

These workflow elements are:

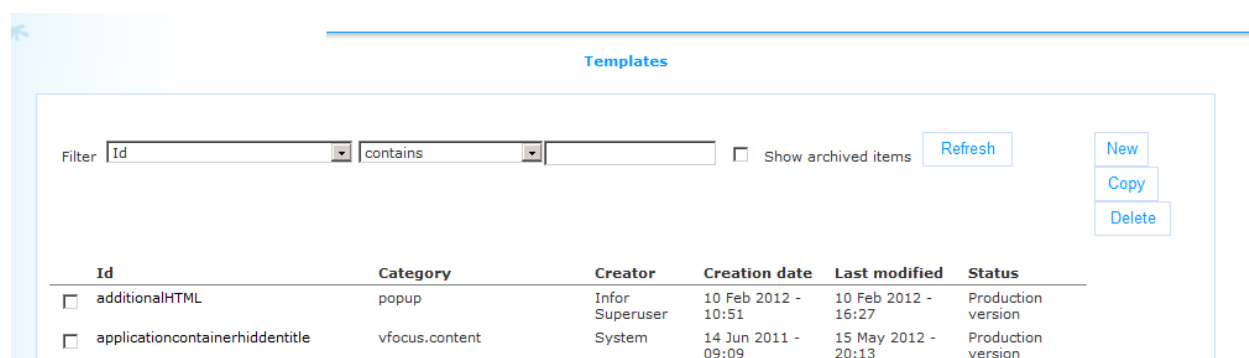
- instances overview
- options on the instances overview page

2 Instances overview page

The workflow of most elements that can be defined via the CMS, such as pages, applications, site profiles, templates, and many others, involves pages that show an overview of all instances of the element (e.g. an overview of the available pages, an overview of the available applications of a specific type, etc.).

This section describes how such overviews are displayed. The next section describes the options that are available on the overview page.

If an option is selected from the navigation menu, the list of existing instances of the chosen data element is displayed. The list displays the most important properties for each of the defined instances. How many and which properties are displayed differs between the selected option types (e.g. pages have other properties than RSS feeds, than word clouds, or than templates); typically, the number of properties displayed lies between three and six.



	Id	Category	Creator	Creation date	Last modified	Status
<input type="checkbox"/>	additionalHTML	popup	Infor Superuser	10 Feb 2012 - 10:51	10 Feb 2012 - 16:27	Production version
<input type="checkbox"/>	applicationcontainerhiddentitle	vfocus.content	System	14 Jun 2011 - 09:09	15 May 2012 - 20:13	Production version

The following options are available:

- Filters (+ Refresh) : to refine the list of instances (and to show or not show archived instances)
- New : to create a new instance
- Copy : to copy an existing instance to a new one (*)
- Delete : to delete an instance (*)
- Sort : to sort the list of instances
- Select : to select an instance; this gives access to the full list of properties for the selected instance.
- Show tree: this option is only available on the instances overview pages of Applications

The items in the list are preceded by check-boxes. The Copy and Delete options are used in conjunction with the check-boxes: these options can only be used if you check one of the check-boxes in the list. (There is no multi-select feature, i.e. you can only select one check-box at a time.)

Each of these options is described in detail in the following section.

3 Options on the instances overview page

3.1 Display filters

Display filters can be used to restrict the list of displayed instances to a subset of the full result set.

The screenshot shows a filter interface with the following elements:

- A label "Filter" on the left.
- A dropdown menu currently showing "Id". The menu is open, displaying the following options: "Id", "Category", "Creator", "Creation date (yyyyymmdd)", "Last modified (yyyyymmdd)", and "Status".
- A dropdown menu for the operator, currently showing "contains".
- An empty text input field for the filter value.
- A checkbox labeled "Show archived items" on the right.

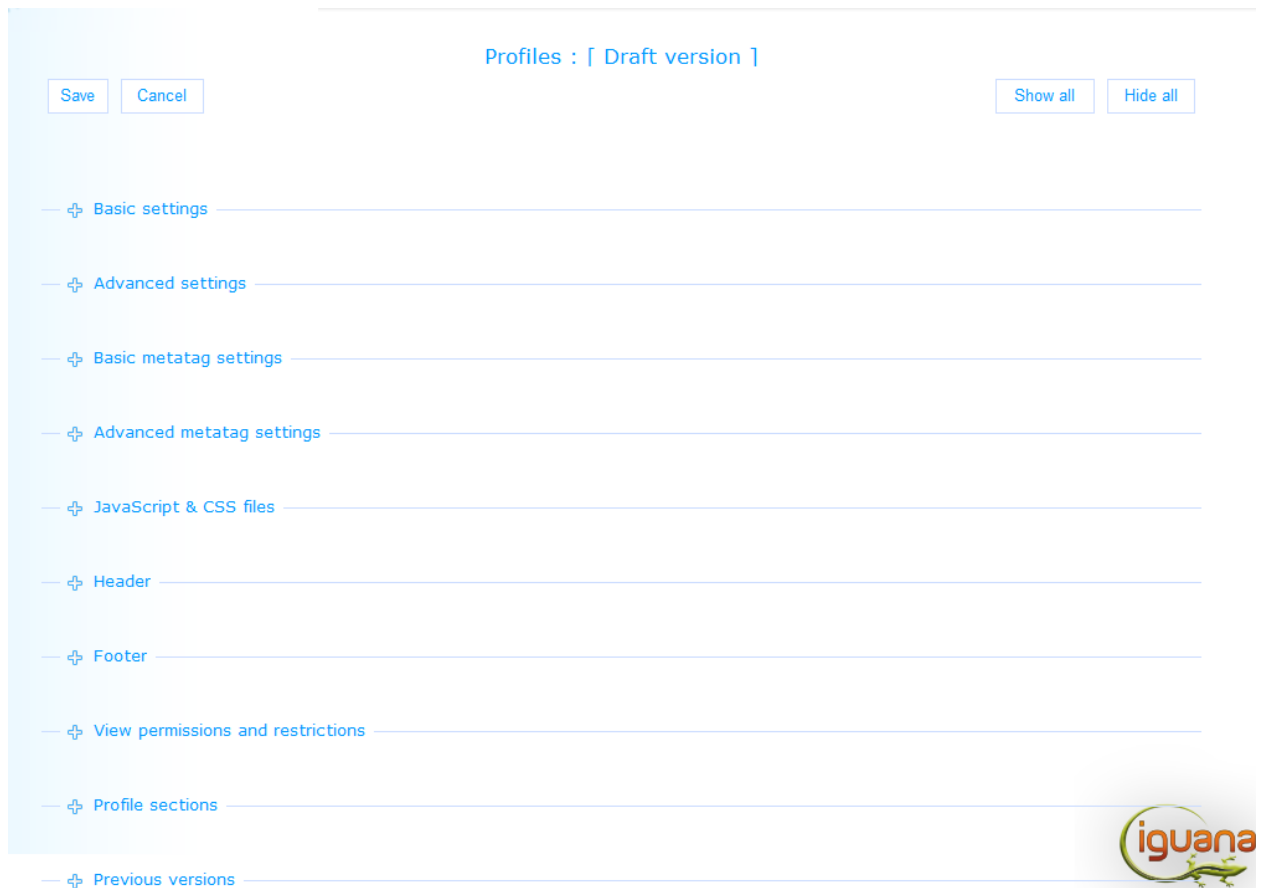
The filters consist of the following elements:

- Date element : the data element on which the filter is applied; you can restrict on all data elements that are displayed on the overview page (i.e. each column can serve as a filter)
- Operator : the operator that is used for the filter; the supported operators are:
 - contains
 - does not contain
 - greater than
 - smaller than
- Value : the value that is used to evaluate the restriction (e.g. Title contains “test” or Creation date greater than “09 Dec 2009”); please note that dates must be entered as YYYYMMDD (“09 Dec 2009” is entered as 20091209); Contains and Does not contain are case-insensitive (i.e. if you want to search for instances that contain the string “ROM”, you can enter this as “rom”, “ROM”, “RoM”, etc.)
- Show archived items : if this value is checked (set to Yes), archived items will be included in the display; by default, this value is not checked (set to No)
- Refresh : if you click on the **Refresh** button, the defined filter will be applied to the result set of instances

To remove a filter, you should leave the **Value** field empty and then click on the **Refresh** button.

3.2 Create a new instance

To create a new instance, click on the **New** button.



A new instance will be opened, with all the properties (data fields) set to either empty, or to a default value. The actual content of the page (i.e. the list of properties) depends on the type of data you are working with (e.g. pages have other properties than RSS feeds, than word clouds, or than templates).

3.3 Copy an instance

To copy an instance, check the instance that you want to copy and click on the **Copy** button.

A new instance will automatically be created and Iguana will switch to the animation instance detail page of the new (“copied”) instance.

The new instance will only be filed if you click on the **Save** button on the details page.

3.4 Sort

To sort the result set of instances you can click on a column header.

If you click on a column header, the result set will be sorted on the content of that column (which, depending on the content of that column, can be alphabetical, chronological or numerical, i.e. A-Z, Jan 1-Dec 31, 0-999999999999).

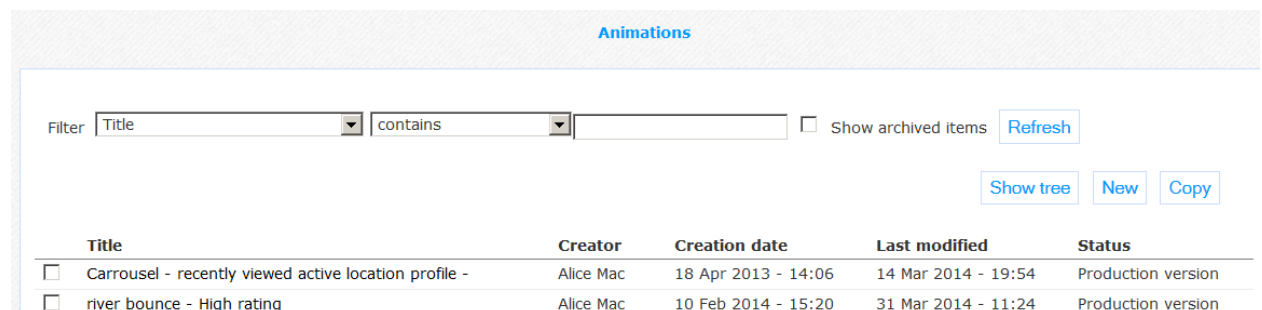
If you click again on the same column header, the list will be re-sorted, but now in reverse order (i.e. Z-A, Dec 31-Jan 1, 999999999999-0).

3.5 Select an instance

To select an instance you click on one of the instances (i.e. on the Title in a specific row in the list). The details page will be opened. The actual content of the page (i.e. the list of properties) depends on the type of data you are working with (e.g. pages have other properties than RSS feeds, than word clouds, or than templates).

3.6 Show tree

For Applications, another option is available on the instances overview pages:



The screenshot shows the 'Animations' overview page. At the top, there is a filter section with a dropdown menu set to 'Title', a search box containing 'contains', and a 'Refresh' button. Below the filter, there are three buttons: 'Show tree', 'New', and 'Copy'. The main content is a table with the following columns: Title, Creator, Creation date, Last modified, and Status. The table contains two rows of data:

	Title	Creator	Creation date	Last modified	Status
<input type="checkbox"/>	Carrousel - recently viewed active location profile -	Alice Mac	18 Apr 2013 - 14:06	14 Mar 2014 - 19:54	Production version
<input type="checkbox"/>	river bounce - High rating	Alice Mac	10 Feb 2014 - 15:20	31 Mar 2014 - 11:24	Production version

When you click on Show tree, a pop-up will appear showing the tree structure of applications storage:



The screenshot shows a 'Select an application' dialog box. The dialog has a 'Cancel' button at the top left. The main content is a tree structure of applications storage. The root is 'FeaturedItems', which contains a folder 'animations'. Under 'animations', there are several sub-folders: 'recently returned' (containing a sub-folder 'Recently returned Items (559fe4da-cbcd-400c-b8c1-1859e565f7ea)'), 'recently viewed', 'active', 'rolodex', 'rotating gallery', 'picturelist', and 'river bounce'.

4 Generic instance properties

A data element details pages shows all properties that are linked to the data element that you are working with (e.g. the page, the RSS feed, the word cloud, etc.).

There are three property groups that are shared between most, if not all, data elements (pages, applications, etc.) and that always contain identical properties. These are:

- View permissions and restrictions
- In use
- Previous versions

These property groups are described in this section. Property groups and properties that are specific for data elements (pages, applications, site profiles, etc.) are described in the section that discusses these specific data elements.

4.1 View permissions and restrictions

View permissions and restrictions are used to define “who can see what” or “who has access to what”. This gives you the ability to restrict access to instances for specific users or under specific circumstances. The following properties can be defined.

View permissions and restrictions

Inherit view permissions from page

OR define specific settings

Publish starts on

Publish ends on

Location profiles

Include Exclude

Profiles

Include Exclude

Languages

Lagon required

Also for smartphone

Only for smartphone

Save settings as default

Define these properties as follows:

Inherit view permissions from default profile: If you set this property to Yes, all other properties in this section will be discarded. In such a case, the properties will be inherited from the View permissions and restrictions as defined at the Site profile level.

Publish starts on: If you set a date here, the instance will not be published before this date. Click in this field to invoke the calendar. To clear a value, delete the contents of the date field.

Publish ends on: If you set a date here, the instance will no longer be published after this date. Click in this field to invoke the calendar. To clear a value, delete the contents of the date field.

Note

The Publish dates (start and end) do not have any affect on the main menu itself (main header, Main toolbar etc.) inserted into a profile/page; but rather on the individual options / items that are available within this toolbar. These are set on the individual components within the navigational set as part of the restrictions and permissions.

Location profiles: Depending on the value of the Include/Exclude property, you can define whether this instance needs to be displayed for these Location profiles only (INCLUDE) or the opposite, not for these Location profiles (EXCLUDE). Location profiles are defined via CMS > Pages and Profiles > Location Profiles. You can select one or more location profiles.

Profiles: Depending on the value of the Include/Exclude property, you can define whether this instance needs to be displayed for these Site profiles only (INCLUDE) or the opposite, not for these Site profiles (EXCLUDE). Site profiles are defined via CMS > Pages and Profiles > Site Profiles. You can select one or more Site profiles.

Languages: You can select one or more languages. The instance will not be published when the interface language in Iguana is not included in the selected languages. (Example: you want a menu item to appear only when the interface language is Italian. In such a case you select Italian from the list of available languages.) If you select no language, the instance will be available for all interface languages.

Logon required: If you set this property to Yes, the instance will only be displayed if the user is logged on.

Also for smartphone: If you set this property to Yes, the instance will also be included if it is invoked on a smartphone.

Only for smartphone: If you set this property to Yes, the instance will only be included if it is invoked on a smartphone.



Please note that not all of these View permissions may be available in all contexts. If you (e.g.) look at a Profile, the View permissions section will, obviously, not include a

View permission on Profiles.

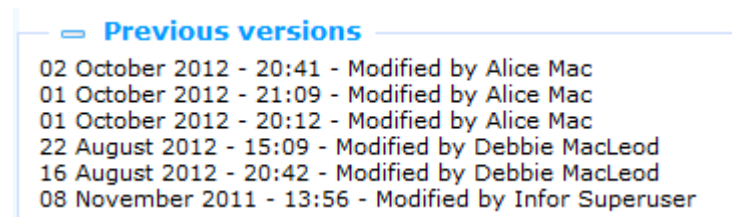
4.2 In use

The In use section of the properties displays the combination of Profiles and Pages on which the instance is included.

You can click on a Profile and Page combination to invoke it. The Page will open in a separate browser window.

4.3 Previous versions

Iguana will store up to ten previous versions, which are displayed in the Previous versions property section.



The previous versions can be invoked by clicking on them.

If a Previous version is selected, it can be saved as the current version by clicking on the **Restore this version** button.

5 Properties and languages

If you are managing multi-language sites, you will want to define some properties in multiple languages. This is typically the case for all texts and content that needs to be displayed in a specific language.

The name of properties that are language specific is followed by the default language (e.g. "Title (English)").

If multiple languages are supported, the Iguana CMS will display a hyperlink **Click here for other languages** for those properties that are language specific. If you click on the link, the property will be repeated as many times as there are interface languages that are supported within the site.

If the property is defined using the RTE (Rich Text Editor), the RTE will be displayed multiple times (one RTE for each supported language).

The following screen shot shows the Basic section from the Animations configuration page. A number of the properties are language-dependant. These properties are followed by the **Click here for other languages** link.

Animations : What are other people looking at [Draft version]

Save Delete Validate for production Cancel Show all Hide all

Basic settings

Tree storage 1 [] 2 [] 3 [] 4 [] 5 []

In use

Name EssexPresentation

Type Recently Viewed

ID *

Provider Vubis

Scope *

Presentation River bounce (a b c d e f e d c b a)

Additional configuration []

Title (English) What are other people looking at

Subtitle (English) today

Keywords (separator=semi-colon) (English) []

Notes (English) []

[Click here for other languages](#)

If the user clicks on the link, the section is expanded: each of the language dependant properties will now have a language instance. The following screen shot shows this effect (for a system that is configured for English, French and Dutch).

Tree storage 1 [] 2 [] 3 [] 4 [] 5 []

In use

Name EssexPresentation

Type Recently Viewed

ID *

Provider Vubis

Scope *

Presentation River bounce (a b c d e f e d c b a)

Additional configuration []

Title (English) What are other people looking at

Subtitle (English) today

Keywords (separator=semi-colon) (English) []

Notes (English) []

[Click here to hide other languages](#)

Title (French) []

Subtitle (French) []

Keywords (separator=semi-colon) (French) []

Notes (French) []

Title (Dutch) []

Subtitle (Dutch) []

Keywords (separator=semi-colon) (Dutch) []

Notes (Dutch) []

Title (Italian) []

Subtitle (Italian) []

Keywords (separator=semi-colon) (Italian) []

Notes (Italian) []

The **Click here for other languages** link is now replaced by the **Click here to hide other languages** link.

6 Owner groups

Owner groups can be used to protect parts of the CMS setup from modification by unauthorized users.

The setup is done in the CMS Parameters, for more information, see the chapter *Owner group* of the "[Parameters](#)" document.

Use of this functionality is optional. Below are some examples of how and where the group can be applied.

Note

Not all definitions have the possibility to assign owner group(s).

Content-applications – Animations – Advanced settings

Advanced settings

Created by: Tineke, on 06/04/2016

Unique id: [input field]

Show personal interests:

Touch enabled:

Cover presence check:

Hide dummy cover:

Number of days to go back: [input field]

Number of embargo days: 1

Maximum number of records: 15

Height: [input field]

Width: [input field]

Background image: [input field] [Search](#)

Owner groups: [dropdown menu] [dropdown menu]

- All
- Schools Only Owner Group
- Wp Only

Content-applications – Word cloud – Advanced settings

Advanced settings

Created by: Tineke, on 6 April 2016 - 10:01

Unique id: [input field]

Owner groups: [dropdown menu] [dropdown menu]

- All
- Schools Only Owner Group
- Wp Only

Publisher – Content containers – Basic settings

Basic settings

In use

Comment

Content types

Agenda		
calendar		
Comments (Multilingual signed		
Content Type Calendar		
Content Type Events		
Content Type Library News		

Include archived content

Included tags

Location profiles

None

Active location profile

The following profiles

BD		
SchPs1		
SchPs10		
SchPs11		
SchPs12		
SchPs13		

Owner groups

All		
Schools Only Owner Group		
Wp Only		

Title (English)

[Click here for other languages](#)

In all cases you see the parameter **Owner groups**. The box on the left contains all groups as defined under Parameter object Owner group. They can be moved to the box on the right in the normal way, to apply them to the definition in question.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	August 2011	Creation	
1.1	December 2011	Review	Edwin van der Geld
1.2	December 2011	Review	Debbie MacLeod
1.3	December 2011	Added screen shots in the section on Properties and Languages	
1.4	January 2012	Added header	
1.5	January 2012	Added header (again) Reviewed	
1.6	January 2012	Added language property to section on View restrictions	
2.0	May 2012	Reformat for online help doc	
3.0	October 2012	Added screen shots; reformatted part of 3.0 updates	
3.1	April 2014	New option Show tree part of 3.0 updates	
4.0	April 2016	New parameter Owner groups part of 3.0 updates	