Web Site Management Redefined

In-portal User Manual

In-portal Platform 1.0.5

In-link 3.0.5

In-newz 1.0.5

In-bulletin 1.0.5

Revision: 1.7. November 11, 2004

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1. INTRODUCTION

In-portal is a revolutionary web site management system that allows you to automate and facilitate management of sites of various functionality and complexity. In-portal is a platform controlling and managing every aspect of your web site. Regardless of whether you are running a directory site or a portal, a community site or an online mall, In-portal will enhance your web site management experience with innovative features and functionality administered through a comprehensive centralized Administrative Console.

In-portal is a modular platform. While it contains the core functionality necessary for running a web site, the extended functionality is provided by product modules, each serving its own specific purpose. This allows you to purchase and install only the functionality that is needed for your project.

This document covers the basic concepts of the In-portal Platform, and its modules such as In-link, In-newz, In-bulletin and the Administrative Console.

This document is divided into chapters by functionality – Installation, Concepts, Administration, Front-end Customization, etc. Each chapter is broken down by module, and then by sub-chapters. Please refer to the chapters that are applicable to your In-portal selection of the modules.

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3. INSTALLATION & GETTING STARTED

3.1. User-Side Requirements

Since the front end of the In-portal Platform is completely template based, its compatibility with various browsers depends on the implementation by the site administrator. The default theme supplied with In-portal is compatible with Microsoft Internet Explorer version 5.0 and higher, and Mozilla version 1.5 and higher.

In-portal's Administrative Console requires Microsoft Internet Explorer version 5.5, Mozilla 1.6 or higher with Java Script enabled, in order to be able to utilize all of its features. You may be able to use older browsers; however, your experience may be limited, as older browsers do not support all of the technologies utilized by the Administrative Console.

3.2. Server-Side Requirements

3.2.1. Software and Environment Requirements

In-portal Platform and all of its modules have the same server requirements. As of version 1.0.5, the server requirements are as follows:

- OS: Microsoft Windows 2000, XP Pro, 2003; Linux (most flavors); FreeBSD, BSDi, Sun Solaris 7 and higher.

- Web server: IIS 5.0 or higher, or Apache 1.3 or higher. The web server must support PHP 4.1.x or higher.

- Database: MySQL 3.23 or higher

- Space Usage: 10 MB for the files, and 1 MB for the database of an empty installation. Thereafter, the database space usage is, on average, 0.5KB per each record (category, item or user).

3.2.2. Hardware Recommendations

The server hardware requirements are dependent on the actual web site, its traffic, the load on the server, the software installed and the optimization of all components.

Below are possible scenarios, for statistically average web sites and servers, and they are not hard and fast rules but suggestions:

- Smaller sites: (1K-10K records, 100-500 unique visitors per day) will work on most LAMP (Linux/Apache/MySQL/PHP) virtual hosting accounts.

- Medium sites: (10K – 90K records, 500-1500 unique visitors per day) require higher end virtual accounts (with at least P4/Xeon, 2 GHz CPU and 20 MB/site RAM ratio, and fast hard drives) or a startup dedicated server.

- Larger sites: (100K – 500K records, 1500-5000 unique visitors per day) require a dedicated server (high end CPU, dual preferred, at least 2 GB RAM, fast hard drives).

If you have questions regarding your particular site, please contact us to determine your scalability requirements. For questions related to compatibility, technical requirements and performance, please contact us at support@intechnic.com.

3.3. Getting Started

In order to install In-portal Platform or its modules, you will need to have the program files and your hosting information – URL where the product will be installed, FTP login, and the database name, user and password. Live or production web sites require a valid license. No license is necessary for a local development installation (for more information about licensing, please see chapter 2). To obtain the program files and the license you must register on our web site, http://www.in-portal.net/, and follow the instructions there.

Once you have downloaded the compressed program files, you will need the FTP or direct access to your web server.

- For a remote Microsoft Windows server, the best option is to uncompress the archive with WinZip or any other compatible product, and then upload the resulting `in-portal` directory to the web server, to the location where you want the product installed.

- For a local Microsoft Windows server, the easiest option is to copy the .zip file to your web site location, and uncompress it directly there.

- For a Linux/Unix server, if you have shell access (Telnet or SSH), the best option is to upload the tar.gz archives to the desired destination, and run the unzip/un-tar command (`tar –xvfz in-portal_1_0_4.tar.gz` for example). The command and the syntax may vary depending on the OS. Please consult the server administrator.

- For a Linux/Unix server without shell access, please uncompress your files locally, and then upload the `in-portal` directory to your desired location.

You may rename the `in-portal` directory, as you like.

Several files and sub-directories in the `in-portal` directory need to be writable by the web server for successful installation and future operation of the Administrative Console. These files and sub-directories are:

```
/ [creating a file in the root directory]
/admin/backupdata
/admin/export/
/kernel/images/
/themes
```

After you have uploaded your program files, and have set the write permissions, you will need to run the In-portal installation script. The script is located under the `in-portal/admin/install.php` path. For example, if your In-portal system's URL is `http://www.in-portal.net/demo/`, the installation script will be located at `http://www.in-portal.net/demo/admin/install.php`.

3.4. Security

For security purposes, we recommend that you protect your '/admin' sub-directory with a server-side password (for Apache, it can be done using a .htaccess file; for IIS you will need to setup a system user and require authentication on the admin sub-directory). We also recommend making your 'config.php' non-writable by the web server after the installation is successfully completed.

3.5. Installation Script

3.5.1. Step 1 – Database Configuration

Please fill out the database connection information *(server location is usually* localhost*, and you can find out the database name/user/password combination from your server administrator, or in the hosting account's Control Panel)*.

You may then choose a table prefix that will be preceding all of database table names used by In-portal Platform and modules. This option is useful when you are installing more then one copy of the In-portal Platform on the same database, or if it is sharing the same database with another application and you want to prevent the table naming conflicts.

3.5.2. Step 2 – Select a License

All life or production installations of the In-portal Platform and any modules require a valid license obtained from Intechnic Corporation. A local or development installation, which is not accessible from the Internet (has a non-routable IP) and is used only for demonstration or development purposes, does not require a license. For more details, please go to http://www.in-portal.net or see the chapter 2 above.

There are two options for selecting a license:

- Download from Intechnic: in order to download the license directly from Intechnic, you must have a registered account (http://www.intechnic.com/myaccount). If your server allows outbound Internet connections (most servers do), you can use the My Account login to download the license automatically. The installation script will guide you through the remaining process, if this option is selected.

- Upload License File: you may upload the license file if you choose this option. The license file can be obtained from the My Web Sites section of the My Account (http://www.intechnic.com/myaccount). This option is useful if you are installing In-portal on your local server, without the access to the Internet.

3.5.3. Step 3 – Select Domain

This screen will show you all domains, which are valid for the license you have picked, or all local domains, which are available. Please select the domain where you want the In-portal site to reside.

In the "other domain" field, you may enter an IP address, if you do not wish to use a domain name, or a local computer name.

3.5.4. Step 4 – Set Root Password

This screen of the installation script will prompt you to enter a root password for your In-portal system. The root access is the highest-level (superuser) access into the system. It is not designed for daily use, but rather reserved for the In-portal administrator to perform major system operations, and to create additional administrative users.

Please take extra care not to loose your root password. If you do so, and you do not have any other administrative users set up, you will permanently loose access to your Administrative Console.

3.5.5. Step 5 – Select Modules

The installation script will automatically determine which modules' program files are uploaded to your `in-portal` directory and are available for installation. This screen will allow you to select the modules that you want installed at this time.

If the desired module is not listed, it is because you did not upload it to the correct location. Please double check that the module program files have been uploaded directly under your `in-portal` directory. For example, the In-link module should be located in the `in-portal/in-link` directory. It is also possible that you do not have the appropriate license for this module on this domain.

3.5.6. Step 6 – Language Packs

This screen you will prompt you to select the regional packages you want to install. In-portal Platform version 1.0.5 comes with a default regional package. Additional regional packages may be available for download from our web site (http://www.in-portal.net/).

You can add more regional packages through the Administrative Console later. Please see the section 5.2.5.3 of this manual for more information. Also, please note, that at least one regional package must be enabled during the initial installation; otherwise, you will not be able to operate your Administrative Console.

3.5.7. Step 7 – Select Default Language

This step will allow you to select the default language for your system. You can change the default language from the Administration Console later. Please see the section 5.2.5.3 of this manual for more information.

3.5.8. Step 8 – Post-Install Configuration

The next few screens will allow you to configure the default options for the In-portal Platform and the modules you have installed. All of these settings can be changed later through the Administrative Console.

3.5.8.1. *In-portal Platform Settings, part 1*

- Web address: The full directory path where your In-portal system is located. It is the portion of the URL that comes directly after the domain name. Example: if the URL is http://www.in-portal.net/demo/, then the full path is `/demo/`. Please note, that the preceding and the trailing slashes are required. The installation script will detect the full path automatically and you only need to change it in the event of a non-standard web server configuration.

- Website name: The title of your site that will appear in the browser title bar. For example, "My Website", or any other arbitrary text.

- Session Management Method: Choose between 'Query String', 'Cookies' or 'Automatic'. For more information, see section 5.2.5.1 of this manual.

- Session Inactivity Timeout (seconds): Set the timeout (in seconds), after which all inactive users (both front-end and administrative) will be automatically logged out. This is an important security feature, and it is not recommended to set the session expiration to more than 3600 seconds (1 hour).

- Time zone of the server: Please select the time zone of your server's location. You can find out this information from your server administrator.

- Time zone of the site: Please select the time zone for your web site. Please note that this can be different from the time zone of the server, depending on your geographical location. This setting will allow you to see the accurate date/time stamps recorded by the system.

- Mail Server Address: You need to set this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal. Leaving it blank will use your web server's default mail transport.

- Port (e.g. port 25): Set the SMTP port of your external mail server. You need to set this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Server Requires Authentication: Check this if your SMTP server requires a user name and a password to send mail through (this is common on the newer mail systems). You need to set this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Mail Server Username: Enter the user name for your SMTP server. You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Mail Server Password: Enter the password for your SMTP server. You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Messages from Site Admin are from: Enter the email address that will appear as the FROM address on all automatically generated email messages. This should be a real email address to enable users to reply, and to receive failed message notifications. This field must be changed from its default value.

3.5.8.2. *In-portal Platform Settings, part 2*

- Allow new user registration: This designates how your new users will be registering through the front end. 'Instant' means that they will automatically be enabled after the registration. This option is useful for sites that anticipate a large user base, and do not need a high level of security. The 'Not Allowed' option will unconditionally deny registration on the front-end. The

administrator will still be able to create front-end users through the Administrative Console. This is the highest security setting. The 'Upon Approval' option is for administrators who want to approve manually the user registrations. This is the default option.

- Assign registered users to group: If you have allowed user registration in the above question, this option will designate a group, to which all newly registered users will be assigned. To learn more about groups, please see section 4.2.3 of this manual[*].

- Assign users not logged in to group: In order to manage permissions for your site's visitors (people who have come to your site, but have not logged in), you will need to designate a group in this question. To learn more about groups, please see section 4.2.3 of this manual[*].

- Assign mailing list subscribers to group: Here you can choose which group will be designated for the users, who choose to use the 'subscribe' option on the front end[*].

- Assign password automatically: Checking this option will let the In-portal Platform automatically generate random passwords for new users, and send them to the user in the registration email. This is a good way to verify the existence of a user's email – if they do not receive the email with the password, they will not be able to log in. The users will be able to set their own password later.

- Number of days to deny multiple votes from the same user: This setting controls how often the same user can vote on the same resource or item. For example, if you set it to 3 days, a user will not be able to vote on the same link for 3 days after their first vote.

- Number of days to deny multiple reviews from the same user: This setting controls how often the same user can create reviews for the same item. For example, if you set it to 3 days, a user will not be able to create a new review for the same link for 3 days after their first one.

3.5.8.3. In-portal Platform Settings, part 3

- Order categories by: This setting specifies the default primary sort order for categories in lists (both front end and Administrative Console).

- And then by: This setting specifies the default secondary sort order for categories in lists (both front end and Administrative Console).

- Number of categories per page: This setting specifies the default number of categories to be shown on one page.

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[*] You will be selecting from a predefined list of groups here. Later, in Administrative Console, you will be able to create your own groups, and change these settings, if necessary.

- Categories Per Page (Shortlist): This setting specifies the default number of categories to be shown on one page, when viewed as a short list on the front end.

- Number of days for a cat. to be NEW: This setting specifies how many days a category will keep its 'new' status. The 'new' status can be individually changed for each category, but the default value is 'automatic', which will use this setting.

- Display editor PICKs above regular categories: Checking this option will force the Editor's Pick categories to be listed above the regular categories. The Editor's Pick setting will take precedence over any other priority setting.

- Root category name (language variable): Enter the name of a language variable, which will designate the name of the root category. The default variable name is 'lu_rootcategory_name', and in English it has a value of 'Home'. Usually you don't need to change the variable name, because you can change the value of the variable just as easily. For more information about languages, please see section 4.2.6 of this manual.

- Default META Keywords: Enter text here that will be displayed as a default META keyword tag on the front-end pages. If a category will have its own META keyword tag, it will take precedence over this setting. You may also leave it blank.

- Default META description: Enter text here that will be displayed as a default META description tag on the front-end pages. If a category will have its own META description tag, it will take precedence over this setting. You may also leave it blank.

3.5.8.4.   In-portal Platform Settings, part 4

- Default Theme: Choose the default theme. The only selection here will be the themes that you have already uploaded to your `in-portal/themes` directory. The default installation of 1.0.5 comes with one theme called 'Default'. Additional themes may be available for download on our web site: http://www.in-portal.net/

3.5.9.   Step 9 – Post-Install Configuration

Congratulations! You have completed your In-portal installation. Clicking 'Continue' will take you to your new Administrative Console.

Please remember to log in with the user name 'root' and the password that you have assigned in the step 4.

3.6. Upgrades

The In-portal Platform or module upgrade is very similar to the original installation. In this section, we will outline the main differences of the upgrade process from the original install process. Please refer to chapter 3.5 for full details.

Before any upgrades, as well as any other major changes to your system, we strongly recommend that you make a backup copy of your data and your program files. To backup

the program files, you may simply make a copy or download your 'in-portal' directory and all of its contents. To backup the database, you may use Administrative Console's backup utility (you can find more about it in the section 5.2.6.1), or any other database backup tool at your disposal. We also recommend doing the upgrades on your live site during the low-traffic hours, and maybe warning your users that the site will be briefly unavailable. During the upgrade, there will be a brief period in the middle of the process, when your site may not behave as expected.

To start an In-portal Platform or a module upgrade, you will need to obtain the new version of the program on our web site, http://www.in-portal.net/, download it to your computer, and then upload to the server, where In-portal is hosted. You will need to overwrite the files of the program you are upgrading and the theme templates. In the case of a module, those files will be located under 'in-portal/[module name]' subdirectory, for example 'in-portal/in-link'. The theme files will be located under 'in-portal/themes/[theme name]/[module name]', for example 'in-portal/themes/default/in-link'. For the In-portal Platform upgrade, you will need to overwrite all files and subdirectories under 'in-portal', except for any module subdirectories, and the theme template files, except for any module-related files. Unzipping the archive that you download from our site (using either tar-gzip combination on Linux/Unix or WinZip on Windows) should do this for you automatically.

Please be very careful during this process! You may overwrite files that you may have previously customized. This is especially pertinent to your theme templates! If you have made program customizations, you may overwrite the files selectively, or update the new files with your customization. Intechnic Corporation does not support any third-party customizations, and you will loose your free technical support if you make changes to our default distribution. If you have made theme customizations, please feel free to keep your templates, and only add/replace those from the upgrade that you need. Not updating your theme will not affect your data or Administration Console functionality.

Once you have uploaded all the desired files, you will need to make the 'config.php' file writable to the web server (if you have disabled this, as we recommended), after the installation. Please do not forget to set it to the read-only mode again, after the upgrade is complete.

Now you may open the installation script in your browser and begin the upgrade process.

3.6.1. Step 1 - License Verification
If you have done everything in your upgrade correctly so far, you should see the following reminder message in red at the top of your script: "In-Portal is already installed at this location." If you do not see this message, please do not proceed with the upgrade, until you resolve the problem.

To begin the database upgrade, the script will need to verify that you have sufficient rights and the correct license for this process. You may either enter the 'root' user name and password for your In-portal system, or your login and password of My Account area on our web site (http://www.intechnic.com/myaccount). For the latter option, your web server will have to have an outbound Internet connection.

You should see several options below. Please choose the 'Upgrade' option to proceed with the database upgrade. For the description of other options, please see section 3.7 of this manual.

3.6.2.   Step 2 - Select Modules to Upgrade

At this screen, you can select which modules, or In-portal Platform, to upgrade. The upgrade script will automatically find all updated program files, and show you your current version, and the new version, the one you are about to upgrade to. This is the last chance to change your mind and cancel the process – so far, no database changes have been made.

3.6.3.   Step 3 – Finish

The upgrade has been completed. You can resume using your system and enjoy the new features.

3.7. Maintenance

If you ever need to do global changes to your In-portal system, such as move it to a different database, perform a restore after a fatal crash, or update your license, you can use the same installation tool, located at `'/in-portal/admin/install.php'` under your In-portal web site. This process is very similar to the Install and Update, described in sections 3.5 and 3.6, respectively.

Before any installation changes, we strongly recommend that you make a backup copy of your data and your program files. To backup the program files, you may simply make a copy or download your `'in-portal'` directory and all of its contents. To backup the database, you may use Administrative Console's backup utility (you can find out more about it in the section 5.2.6.1), or any other database backup tool at your disposal. We also recommend doing the upgrades on your live site during the low-traffic hours, and maybe warning your users that the site will be briefly unavailable. During the upgrade, there will be a brief period in the middle of the process, when your site may not behave as expected.

You will also need to make the `'config.php'` file writable to the web server, if you have disabled this, as we recommended, after the installation. Please do not forget to set it to the read-only mode again, after the upgrade is complete.

3.7.1.   Step 1 – License verification

At this screen, you will need to verify your privileges and license information. You may either enter the 'root' user name and password for your In-portal system, or your login and password for the My Account area of our web site (http://www.intechnic.com/myaccount). For the latter option, your web server needs to have an outbound Internet connection.

There will be several options below:

- Clean out the In-Portal database and reinstall: This is the most dangerous option. It will erase all of your In-portal data, and make a new, clean installation. Please use with extreme caution.

- Clean out the In-Portal database and reinstall from backup: This is the option you want to use to restore your database from a previous backup. You will need

to have an In-portal backup file available (any other backup files, such as SQL text dump, or a phpMyAdmin backup will not be usable for this option).

- Install to a new database: This option will keep your existing database as it was, and make a new installation in the new database. Once the new installation is complete, your old database will no longer be used, or accessible through the Administrative Console.

- Update License Information: This option will not change your data, only update your license information in case it has changed.

- Change Database Configuration: This option simply updates your Database configuration, without actually making any changes to your data.

3.7.2. Next steps

The following steps will depend on the previous option you have chosen.

- Clean out the In-Portal database and reinstall, and Install to a new database: these options will proceed like a new installation, through all the steps.

- Clean out the In-Portal database and reinstall from backup: You will get a list of all available backup files, similar to the Restore option in the administration panel (see chapter 5.2.6.2). If you have another backup file that you would like to use, please upload it to `in-portal/admin/backupdata` directory and restart the process. Once you choose the backup file, the restore process will begin, and upon completion, you will be able to login to your Administrative Console. Please note that the version of the data in your backup file needs to match the version of the program files you are running. If they do not, you will get a warning, and if you choose to proceed with the restore, the results may be unpredictable.

- Update License Information: You will get a prompt for downloading your license from the My Account area on our web site (http://www.intechnic.com/myaccount) or uploading an existing license file. This is similar to the new installation procedure. You will need to select a domain, on which your In-portal system is running. Please note, that a wrong selection will disable your existing In-portal system, and you will have to re-run the installation script again.

- Change Database Configuration: You will be prompted for the database information, similar to the new installation. Please note, that a wrong selection will disable your existing In-portal system, and you will have to re-run the installation script again.

3.8. Installation Support & Resources

3.8.1. Contacting Support

If you are having difficulties with the installation, or simply want to find out more information about the options available, please visit our support forum, at

http://support.intechnic.com/forum. You may also use our online technical support system, located under My Account area on our web site (http://www.intechnic.com/myaccount).

3.8.2. Installation Services

Intechnic Corporation provides full installation service for an additional fee. Please contact our sales department or go to our web site at http://www.in-portal.net/.

4. CONCEPTS & CUSTOMIZATION

4.1. Web Software Basics

In-portal Platform and its modules are web-based software applications. There are a few general concepts, which are useful to know for their successful operation.

The entire software package, its data, and configuration reside on the web server (and the database server). Once the main program is installed, there is no client application to be installed on your computer. All of the administration is done using a web browser, and can be done from any Internet-enabled computer.

There is a lot of information to be transferred between the server and your computer, and the faster your Internet connection at the workstation is, the better your administration experience will be.

If you have multiple administrators working on your In-portal system, please keep in mind the concurrency issues. The administrators will be accessing the same data at the same time, however because they will see the pages downloaded from the web server and not in real time, they may be looking at something that has already changed in reality. For example, consider the following scenario: Administrators A & B log in to your In-portal system at the same time. They both load the main catalog page, and they see two categories: 'Directory' and 'Forums'. Then, Administrator A decides to go get a cop of coffee before she begins her work. Meanwhile, Administrator B is ready to start working, and he deletes the category 'Forums' or, worse yet, uninstalls the In-bulletin module. When Administrator A comes back, her screen will not change – because she is looking at a static downloaded web page. Nevertheless, the category is really not there any more. Therefore, if she tries to enter the 'Forums' category, she will get an error, and will be confused why that happened – she just saw that category on the previous screen! To avoid confusion and errors in this and similar situations, please be aware of when other administrators are working on the system at the same time you do. Try to avoid working on the same portions of the data, and definitely avoid any destructive actions such as removing modules, themes or regional packages. To be sure you are looking at the most current data, refresh your screen after you have been inactive – by logging out and logging back in, or simply by clicking on the navigation tree to reload the section.

Since you can access your Administration Console from any computer on the planet, with the Internet connection and a browser, please guard your login information very carefully, and choose your passwords wisely. Most of the security breaches happen not when smart 'hackers' are able to circumvent the software security, but when a careless administrator lets others see or obtain their password (via email, an Internet chat or a forum), or chooses a simple password – like 'password' !

All of these comments are applicable to In-portal as well as the majority of other web applications on the Internet.

4.2. In-portal Concepts

In-portal Platform is a core set of libraries, template building blocks and it includes the database structure. The platform performs all of the common services, such as Category and

User administration, and it handles the communication between all modules. The In-portal Platform provides a solid foundation for the advanced functionality delivered by the various modules.

4.2.1. Catalog & Categories

One of the main features of the In-portal Platform is the Catalog, or the main tree of categories. Unlike most other products, and the previous generation of In-link, the categories in In-portal are universal - they can contain items from any of the modules. If you prefer, you still may use them for a single purpose – like a directory, for example. However, if your web site warrants for a common structure for all of its services – you can achieve that with one common category tree using the In-portal platform.

For example, your web site provides resources about cars. You may want to build a category tree based on the make and model of each car. At the top level, you may have USA, Europe, Japan and other countries, famous for their automotive industry. On the level below – respective car manufacturers, such as GM, Ford, Saturn etc, under the USA category, BMW, Mercedes, Peugeot, etc. under the Europe category, and so on. Under each make, you may want to create models and years, or generations – such as Corvette, and a level deeper - C1 through C6. Then you can maintain the links, topics and the news articles about each car in its corresponding category. You no longer need to maintain three cumbersome copies of the structure.

Sometimes it is useful to view your items (links, news articles, topics, or even categories) in a list format, instead of the catalog tree. For example, if you are looking for all pending links, it is a lot easier to work with a list of all links, filtered by status Pending, then to look through all categories to find which ones contain those links. To view your items in a list form, use the Advanced View section.

The categories are also a cornerstone of the permission structure in In-portal.

4.2.2. Permissions

There are two types of permissions in In-portal: category permissions and user permissions. The category permissions are by far the most useful type but they are also the most complicated type.

4.2.2.1. Category Permissions

Category permissions control what users can do with subcategories and items within each given category. They are somewhat similar to the file system permissions in Microsoft Windows, and several other popular systems. With In-portal, the permissions do not only control the access – which users can read, write or delete items and subcategories, but also define the user behavior within categories. For example, you can take away the permission to Add an item into the category, but allow the ability to Add the item as Pending. The user will be able to add the item, but it will not become visible on the front-end site until an administrator looks at it and approves it.

The permissions are inherited from the 'Home' (root) category down through all subcategories. The inheritance can be broken at any level, for any permission. For example, in the 'Home' category, you have denied the 'Add Link' permission to all users. That means, by default, that nobody will be able to add links anywhere in the system – because all of the

existing subcategories will inherit this setting. However, you can change the permissions on a subcategory, for example, 'Directory', by breaking the inheritance and assigning an 'Allow to Add Links' permission to that category. Then, 'Directory' and all of its subcategories will allow adding new links in them.

For large systems, it becomes impractical to keep track of each individual user, and it is convenient to break up the users into logical groups, by the type of actions they are allowed to perform. Some groups form naturally, like the 'Guest' group. The 'Guest' group symbolizes all site visitors who are not logged in, whose real permissions cannot be determined by the system. The permission system is designed to work primarily with user groups rather than individual users. Therefore, when you are thinking about permissions, you always have to operate with two objects – a group and a category. Later in this manual, when we discuss permissions, we will always say, "assign permission X to some group in some category."

Lastly, the permissions are divided into different sets by modules – In-portal, In-link, In-newz and In-bulletin for the current version of the platform. This is done purely for the ease of administration, and does not have any structural implications. It is simply easier to work with 10 logically grouped permissions then with almost 50 on one page.

4.2.2.2. *User Permissions*

The other type of permissions controls what the users can do outside of the catalog of categories. Since almost everything that happens in In-portal revolves around categories, this is a fairly small set of permissions. For the current version, it consists of the right to log in (to either the front-end or the Administration Console), and some technical settings, such as the right to see the debug information. In the near future, we will be implementing more permissions for the Administration Console – to create the ability to designate various tasks to different administrators.

The User permissions can be assigned either to groups, or to individual users.

4.2.3. Users & Groups

In-portal Platform allows an unlimited number of users, and an unlimited number of groups. Each group can have multiple members, and each user can belong to more then one group. Such complete flexibility allows administrators of small and large systems to work efficiently and as specifically, as necessary.

In-portal platform currently has two built-in groups. The two groups are 'Guests' and 'Subscribers'. Both are virtual groups – their members are determined by the system automatically, and not assigned by the administrator, and they cannot be deleted.

The group 'Guests' refers to all site visitors, who are not logged in. This is the group to which all 'anonymous' users will belong. The group 'Subscribers' refers to all users and visitors, who have subscribed to the In-portal's mailing list. The members of 'Subscribers' may be either real users, or just email addresses submitted by guests. For spam control purposes, the administrator will not be able to add users or email addresses automatically to this group. However, if there is a need for manually controlled and managed groups, it is always possible to create it separately.

The In-portal platform also has one built-in user – 'root'. This user is a 'superuser' with all rights to the system. This user cannot be deleted, and root's rights cannot be modified. This user does not appear in the Community list, and the only operation permitted with the root user, is the change of password, which is done from the General configuration section.

4.2.4. Relations

The relations allow communication between various modules installed on the In-portal platform. They offer an easy way to connect a link, for example, with a news article, even if they are located in different categories.

The relations can also be set up between the same types of items – for example, two links, which are located in separate categories, but are somehow related to each other.

The Default theme is setup to display the related items at the details page of each item. In your implementation, you may customize how the related items are displayed based on your specific needs.

4.2.5. Themes & Templates

In-portal platform builds the front end of the web site dynamically, using a set of templates combined into themes.

A theme is what makes your web site (the public portion of it) what it is – the look, the feel, and the functionality. It is a collection of templates, or page types, which are dynamically and intelligently processed by In-portal and populated with the data from the web site's database.

In-portal allows unlimited themes, but for each individual user only one theme can be active at a time. At least one theme must exist, and if there are multiple themes, one of them must be designated as the primary.

The templates are web page prototypes, which are populated with data and displayed in the appropriate places. With In-portal, there are two types of templates – page templates and element templates, although there is no distinct separation between the two.

The page templates are usually rendered once per web page – they comprise the structure of that page. Some familiar examples of the page templates may be the header template, the footer template, the home page template, etc.

The element templates are used to display each data element – a category, a link, a topic, or a news article. They will be rendered as many times as there are elements on a page.

Most templates consist of HTML (or XHTML) and In-portal tags (In-tags for short). HTML is the coding language on which most of the web pages on the Internet are built. In-portal allows the use of the most common HTML and XML standards in its templates. In-tags are special key words and elements, which instruct the In-portal system on where to place the data and how to render it, among other control instructions.

Templates can be nested in each other, and they can be separated in directories for the ease of management. The 'Default' theme, shipped with the In-portal platform, has a large number of templates, separated into many directories – by modules, and by template purpose.

It is essential, when configuring In-portal and its modules, to be familiar with the templates and to be able to modify them. They are simple text files, located under the `'in-portal/themes/[theme name]'` directory. They can be edited using any HTML-capable editor, and uploaded via FTP, or online through the Administration Console.

4.2.6. Languages & Regional Settings

In-portal uses Regional Settings to render the language- and culture- dependent information. A regional settings package contains all of the text of In-portal, both front-end and administrative, as well as the date, time and currency settings.

In-portal allows unlimited regional packages, but for each individual user only one package can be active at a time. At least one regional package must exist, and if there are multiple, one of them must be designated as the primary.

The most important part of a regional package is the language. The language consists of a number of phrases, which are called labels. Each label has a name and a value. The name is the same in all languages, as it is used internally in In-portal to identify the label. The value is different for different languages – a translation of the label's meaning into the respective language.

In the current version, the data itself – the categories and items – do not support multiple languages. Their text fields (such as name, description, etc) will remain the same as they were originally entered, independent of the current regional package selection.

For easy and effective operation, the regional packages can be exported into a text file and imported from it. The text file itself cannot be translated, because all of the textual information is encoded with Base64 algorithm to preserve the original encoding of the language. However, the Administration Console has an advanced user interface for modifying the regional packages and for making the translations.

In the current version of the In-portal platform, one regional package combines all language phrases for all existing In-portal modules. At the time of the writing of this manual, they are In-link, In-newz and In-bulletin.

4.2.7. In-Tag Library

The In-tag library is a collection of special tags, or elements, which are used in the templates. See section 4.2.5 for more information about the templates and themes.

The In-tags are in the XML format, with the "inp" name space. The format of each tag is as follows:

```
<inp:[tag name] [parameter1]="[value] [parameter2]="[value]" …/>
```

In-tags allow nesting, so there are constructions like `<inp:[tag name] [parameter1]="[value] [parameter2]="[value]" …>` [other HTML/XML/In-tags here] `<[tag name]/>`.

The In-tag name is a predefined name, which usually begins with a one-letter prefix, designating which module that In-tag is in – "m" for the main In-portal platform, "l" for In-link, "bb" for In-bulletin and "n" for In-newz. Some special In-tags do not have prefixes, for example the In-tag "include." The In-tag names are not case-sensitive.

The In-tags have a variable number of parameters, which are optional, but sometimes logically necessary. For an easy example, the `m_language` In-tag will not render anything without its primary parameter: `_Phrase`. Parameters, beginning with an underscore ('_') are In-portal parameters. Parameters without the underscore are the standard HTML parameters, which are passed into the In-tag, and rendered when they logically make sense.

The In-tag library lists all In-tags for the current version of the In-portal platform and all installed modules, provides their descriptions, and lists their parameters.

4.2.8. Code Structure

The code of the In-portal platform is very complex. It is designed to provide basic classes and services, which are later used by modules to perform the specific functions. It also contains the code for all of the Platform services – catalog, users, themes, and the administration panel.

The Administration Console's code is located in the `admin` subdirectory. Under `admin`, besides all of the code, are all of Administration Console's functional directories – `backupdata` (where the backup dumps are stored), `export` (where the export files are saved), `install` (where all of the installation and upgrade scripts are), and `help`, where this document and its HTML versions are stored.

The core Platform code is located under the directory `kernel`. The only functional subdirectory there is `images` – where all of the user-uploaded images are stored.

The directory `themes` contains all of the In-portal themes in the system. Each theme has its own subdirectory.

The `compat` and `tools` directories contain miscellaneous code files.

4.2.9. Database Structure

The database holds all of the In-portal information that is unique to each installation: starting from the Category and User data, to the permissions, caching tables and the session information.

The database is using case-sensitive table names. However, on file systems, which are not case-sensitive, they will all appear in the lower case.

4.3. In-link

In-link is a flagship In-portal platform product. It is a third generation of the Directory management products that Intechnic Corporation has been publishing since 2002. The In-link version 3.0.5 is a lot like In-link 2, however it has been greatly enhanced by the In-portal Platform services and features.

4.3.1. Features

The main element of In-link is a Link. A link is a record with a name and a description that points to a URL. Links can belong to multiple categories, they can be associated with multiple images and have multiple relations with other In-portal items that support the relations.

Links have a number of attributes – a name, a description, a URL; hot, popular and editor's pick flags; creation and expiration dates; an owner; number of votes and a rating.

Links are managed from the Administrative Console, however they can also be submitted by users with the appropriate permissions from the front end of the In-portal web site. Link owners can also have a permission to modify their links. All changes to the links can happen directly, or pending administrator's approval – as defined by permissions in each category.

Links can have an expiration date. By default, it is set to a predefined number of days after the creation date. On the date of their expiration, links become invisible on the front end, but they can still be managed through the Administrative Console. If the expiration date is blank, the link will never expire.

In-link has a built-in link validator tool. It offers advanced features for the administrator to verify the validity of the URLs in the links. The tool checks the links by attempting to follow their URLs, and saving the results of its attempts. If a URL cannot be opened within a predefined period of time (called the timeout), the link will be marked as invalid. There can be a number of reasons for a link to be invalid – from a missing file on a web site, to the entire site not being available or with a limited access.

In the main list of the validator, you will see all links – active, pending and disabled. Each link is designated as 'unchecked' (gray arrow), 'valid' (green arrow) or 'invalid' (red arrow). The validator tool can work will all links in the list (as a batch), or with individual links and their selections.

When working with a batch, you can pause the validation process, and then continue from the point where you left off at a later time. The tool will automatically keep track of which links have been checked and which haven't. You can also reset the batch – automatically marking all links as unchecked. The batch validation mode is useful, since the validation can be a very lengthy process, depending on the number of links and the quality of the server's Internet connection.

When working with an individual link, or with a manual selection of links, you can validate the links, or reset their validation status back to 'unchecked'. You cannot mark the links manually as valid or invalid, but you can disable and delete links directly from this tool.

4.3.2. Code Structure

All of In-link's code is contained within the 'in-link' directory. The front-end scripts are in the root of that directory, and the administration panel files are in the 'admin' subdirectory.

All templates are under each theme in the 'in-link' subdirectory.

4.3.3. Database Structure

In-link utilizes the following two tables:

- Link – contains all of the data about links

- LinkValidation – contains the validation results for all links

4.3.4. Default Theme

The Default theme of In-link is located in a directory called 'inlink'. The home page of the module is defined in the 'index' directory, and the pages inside categories – in the 'cat_index' directory. The links detail page is defined in the 'detail' directory.

4.4. In-newz

In-newz is an online news management tool under the In-portal platform. It allows the administrator to display news, or other text articles on their In-portal-driven web site.

4.4.1. Features

The main element in In-newz is an Article. News articles have the following main attributes: title, author, article body, article excerpt; category lead, site lead and editor's pick flags, the archivation date, etc.

The articles can be created only through the Administration Console in In-newz. They can be assigned to multiple categories, related to any other In-portal item that supports relationships, contain multiple images, reviews and they allow unlimited custom fields.

The article body is generated using an online, HTML-enhanced editor similar to the template editor. The article excerpt can be either entered manually, or generated automatically from the article body by In-newz.

The articles automatically disappear from the front-end after their archivation date passes. To re-enable the article, please move their archivation date into the future. If an article does not have an archivation date, it will not disappear from the front-end until disabled or deleted by the administrator.

The Category Lead articles are displayed in a special location for each category. As many category leads will be shown as the frond end template supports. The rest will be displayed among regular articles.

The Site Lead article is similar to the Category Lead, only it is meant to be displayed on the home page of the In-newz site section. It will be displayed regardless of the category or categories it may be located in.

The articles cannot be submitted from the front end in the current version of In-newz.

4.4.2. Code Structure

All of In-newz's code is contained within the 'in-news' directory. The front-end scripts are in the root of that directory, and the administration panel files are in the 'admin' subdirectory.

All templates are under each theme in the 'innews' subdirectory.

4.4.3. Database Structure

The In-newz has one table in the current version – News.

4.4.4. Default Theme

The Default theme of In-newz is located in a directory called 'innews'. The home page of the module is defined in the 'index' directory, and the look of each category – in the 'cat_index' directory. The articles are defined in the 'detail' directory.

The Default theme is designed to have one Site Lead article with an image, and three category lead stories for each of the top-level categories under the module root.

4.5. In-bulletin

In-bulletin is an online discussion board that runs on the In-portal platform. It integrates seamlessly with the core platform services, and other In-portal modules.

4.5.1. Features
4.5.1.1. Topics

The main item in In-bulletin is a Topic. A topic consists of one or more posts. A topic has several attributes – status, number of replies, rating, number of views, locked and editor's pick flags, and so on.

Topics are administered through the Administrative Console, like any other In-portal platform item. There is only once difference – they cannot be created through the Administrative Console. Since a topic is created when the first post it in is posted, and posts are created on the front-end, a new topic can be only created through the front-end. However, an existing topic can be modified through the Administrative Console.

Topics can be related to any other In-portal platform item that supports relations, they can have multiple images and they can belong to multiple categories. They can also have reviews, and the administrator can configure Custom fields for a topic. All of these features are managed through the administration, but their implementation must be enabled on the front end, by editing the appropriate templates (see section 4.2.5 for more on themes and templates).

4.5.1.2. Posts

Posts are the building blocks of Topics. Posts are created by users with the appropriate permissions on the front-end of the In-portal system. Posts' most important attributes are: the body of the post, the author and the date posted.

Posts can contain smileys, marked up text, and they can also include user signatures. Posts can be edited or deleted through the front end by users with the appropriate permissions.

4.5.1.3. Censorship

In-bulletin provides an automatic tool for administrators to block inappropriate text from their discussion boards. In the administration panel, the administrator can specify which text should be blocked or replaced by other text in the form of rules. For example, the administrator can create a rule to replace "bad word" with "***". Obviously, this tool can be used for any text or phrases, regardless of their meaning.

Intechnic Corporation currently does not ship any predefined filters with In-bulletin. The phrases replaced are not language-specific, and the censorship tool will work regardless of the current language selected in the administration panel or the front end.

4.5.1.4. Smileys

Smileys are small images, usually humorous, which the users can insert into their posts to better illustrate their emotions. Sometimes they are referred to as 'emoticons'. Smileys

can be entered through the Administrative Console, and once they are enabled, they will automatically become available in the posts for all users.

Each smiley is designated by a text shortcut, for example an image of a face with a smile on it is specified with ':)'. In-bulletin will automatically parse all of the text in the post and convert these special shortcuts to the appropriate images, unless this option is specifically turned off in the post.

Intechnic Corporation currently ships a default set of smileys, representing a small set of the commonly used emoticons.

4.5.2. Code Structure

All of In-bulletin's code is contained within the `in-bulletin` directory. The front-end scripts are in the root of that directory, and the administration panel files are in the `admin` subdirectory.

All templates are under each theme in the `inbulletin` subdirectory.

4.5.3. Database Structure

The In-bulletin tables are as follows:

- Censorship – contains all censored words

- Emoticon – contains all smileys

- Posting – contains all posts

- Topic – contains all topics

4.5.4. Default Theme

The Default theme of In-bulletin illustrates the basic capabilities of the program. It is designed based on a 3-level structure assumption – top-level categories under the module root, each category having multiple forums, and each forum having a list of topics.

The list of categories and forums (combined) is defined with the templates under the `browse` directory. The list of topics in each forum is defined under `topic_list` directory, and the list of posts has two representations – regular and threaded, in `post_list` and `post_list_threaded`, respectively.

Other elements and pages are defined is a similar way under the directories with descriptive names.

5. ADMINISTRATIVE CONSOLE

This section describes the features and operation of the administration panel for the In-portal platform and all modules. The full features described below are available when the administration panel is viewed with Microsoft Internet Explorer 5.5 or higher, on a Microsoft Windows 98 or higher operating system, and on a fast Internet connection (128 Kbps or higher).

5.1. Common Controls

This section describes the controls and concepts of the Administrative Console that are the same throughout the In-portal platform. They are applicable to the built-in services, as well as all of the In-portal modules.

5.1.1. Mouse & Hot Keys

Everywhere, where you see a list of items or categories (catalog and list views), the Ctrl+Click action allows selecting multiple items, and Shift+Click action selects all items between the already selected item and the newly clicked item. Right-click on any item provides quick short cuts of most popular operations. Some items have links on them, which will take you inside the item. By pressing Ctrl+Click you can disable the links, if you just want to select the item and not open it. Double-clicking an item or a category performs the edit operation.

The buttons in the toolbar perform the respective operation on all currently selected items. Grayed-out buttons designate operations, which are illegal with the currently selected set of items.

All tabs with two little double arrows in their left corner can be collapsed by double-clicking them. This is useful to free up the screen space to have more information visible on the screen at once.

Buttons with little black arrows next to them designate drop down menus, which are available when the arrows are clicked. They contain additional options for those buttons.

5.1.2. Creating & Editing

In order to create an item or a category in the administrative console, you need to click the 'New' button in the appropriate situation (item icon with a little sun in the upper left corner). If the 'New' button is not available, then it is not possible to create this item, for example for the Events – they are predefined by the program. The exception is the Catalog, which displays the 'New' button only for the active tab, and by switching between item tabs, you will get different 'New' buttons, respective to the items displayed on that tab.

The edit function is performed by double-clicking an item, or selecting one or more items and then pressing the edit button (green check mark) in the toolbar. The Edit and the New forms are essentially the same, except for the edit form displays the current information about the item.

In-portal allows for editing multiple items in batches. To perform that operation, simply select several items and click the 'Edit' button in the toolbar. You will see the edit

form for the first item, however the toolbar will have two additional buttons – 'Previous' (blue arrow to the left) and 'Next' (blue arrow to the right). 'Previous' button is disabled for the first item in the batch, and 'Next' arrow is disabled for the last item, to prevent circular movement through the batch, which could easily confuse the user. It is very important to understand, and to keep in mind, that the batch is saved as one, when the 'Save' button (green checkbox) is pressed, and it is canceled as one, when the 'Cancel' button (red circle, crossed) is pressed. Therefore, if you edit three items, for example, make changes to two of them, and then press 'Cancel', all of the changes in both items will be lost. In addition, the changes will not take affect when the 'Save' button is pressed. Batch editing only works for items of the same type – you cannot edit a category and a link in the same batch.

Another subtlety of editing are the large section tabs on the top right of most edit forms. They represent different sections, into which the item data is broken up. When you move between the tabs, it is essentially the same as scrolling through one long web page – the information is not saved, only temporarily preserved. If you modify the information on the first and second tabs, for example, and then move to the third and press 'Cancel', all of the changes from the first two tabs will be lost. The same logic applies to saving – the changes become available only when the 'Save' button is pressed, not when you move from tab to tab.

Last, but not least, is the editing of the information on multiple levels. Sometimes, when editing an item, you will be taken to a different screen, or a pop-up, with some additional information. It is very important to keep in mind, that you are still editing the item, and that the changes you are making will only take affect (or will be discarded) when you press 'Save' or 'Cancel' on the main item edit page; not when you close the pop-up, or press 'Save' on the additional levels. A good example of this is the Permissions under the Category edit form. When you are editing a category, and then select the Permissions tab, you will be taken to a whole subsection that deals with permissions – modifying them for different user groups, modules, etc. There will be several 'Save' buttons along the way, as you navigate through the permissions sub-section. However, the information is permanently saved only when you click the 'Save' button on the main edit category screen. Little red hints below the toolbar provide you with a reminder, when you have modified something but have not saved the information yet.

5.1.3. Approve & Deny (Activate & Disable)

Most of the items and categories in In-portal have three main states: Active, Pending and Disabled. Active is the normal state of the items – they are visible on the front end; Pending means that the item has been submitted by a user through the front end and is awaiting administrator approval; Disabled means that the item is not visible on the front end, it is usually used when the administrator does not want to delete the item permanently, yet does not want to show it to the public.

The change of states can be performed in two different ways – by editing an item or a category, and selecting the appropriate radio button next to the 'Status' label, and by using the toolbar buttons. The button 'Approve' (green thumbs-up icon) will force the state to 'Active' for all selected items. The button 'Deny' (red thumbs-down icon) will force the state to 'Disabled' for all selected items. There is no button for setting the 'Pending' state, as

it is assumed that the 'Pending' is used by the system automatically (however, it can be manually set through the edit form).

Especially useful for managing the pending items is the Advanced View section. If you set your View menu to display only Pending items, you will get a quick and efficient overview of all pending items, with options to Edit, Delete, Approve and Deny any item or selection of items.

5.1.4. Cut, Copy, Paste

All items and categories in the administrative console can be cut, copied and pasted either individually, or in groups. The 'cut' function (sometimes called 'move') will delete the items from their original location and create them in the destination. The 'copy' function will make a copy of the items in the destination, leaving the originals intact. Both operations take place only once the 'Paste' action is performed. 'Paste' can be performed multiple times, and it will create additional copies of the items each time it is performed.

5.1.5. Priority

All items and categories in In-portal have a 'priority' attribute. This attribute primarily affects the way they are sorted in various displays.

The priority is a whole number, which can be positive, negative or zero. The default priority is zero, and there is no additional indication for items with this priority. A non-zero priority item is easily recognized by a little red number in the top left corner of that item's name.

The priority number can be changed in two ways. The first one is by editing the item, and manually changing the number in the priority field (it's empty by default). The second way is to select one or more items, and click on the 'Increment Priority' button (green arrow up) or 'Decrement Priority' (green arrow down). This will automatically increase and decrease the priority of all selected items by one, respectively.

The items are sorted by the numerical order of their priority. The larger the number, the higher in the descending order will the item appear. Items with the same priority number (including the default zero) will be sorted among themselves according to other attributes. For example, categories with names $^{-1}$A, ^{0}B, ^{0}C, ^{2}D, ^{0}E, ^{1}F will be displayed in the following order, when sorted in a descending order by their name with priority: ^{2}D, ^{1}F, ^{0}B, ^{0}C, ^{0}E, $^{-1}$A. The priority number sorting is always enabled in the administrative console, and in the default theme on the front end.

5.1.6. View Menu

The view menu is present on almost every section in the administrative console. Its icon looks like the Windows Explorer views menu – a little window with tiny icons of folders within. The view menu controls what you see in that section – items with only certain properties, in a specific sort order, specific number of them per page, etc. It also provides you with a short cut to select all items on a page, unselect them and invert a selection. Sometimes, in the catalog section, when you are viewing two types of items on the same page, the view menu will show you the options for both types. Most of the modifications that the View menu offers can be set elsewhere. It is just a convenient, single location where they all can be controlled together.

The view menu has four sections. The 'view' section lists all possible attributes for the items in that section, and allows you to check, which of those would be displayed. By default, the setting is 'All'. The 'Sort' section designates the sort order of the items, and the direction of the sort (ascending or descending). The 'Per Page' section allows you to select, how many items should be printed on one page. The more items are viewable at once, the easier it is to work with them – the more you can select at once, for example. However, the more items are shown on one page, the longer it will take for that page to load, and the more load will the server experience – it has to prepare more items at a time. The last section is 'Select', which does exactly what it is called – it selects the items on that page, deselects them or inverts your selection.

It is very important to remember, that the settings in the view menu are persistent for the duration of your session. This means, that if you leave a section but come back to it later before you log out, you will see the same settings as you have designated there during the first visit. For example, if you where looking at all Pending users in the Community section, then went somewhere else to do other work, and then came back to the Community section, you will still see only the Pending users. In this example, it is easy to visually see the difference – because the pending items have a little green question mark in their icons. However, some of the attributes don't get reflected in the icons, and it is easy to forget that you are actually looking only at a subset of the items, and not at all of them. A little red hint below the toolbar will remind you, that you are not looking at all items in this situation.

5.1.7.   Pop Ups

Due to the vast amounts of information that is available in the administrative console, In-portal makes a heavy use of the pop-ups. Please make sure that if you have a pop-up blocker, it is disabled for the In-portal admin site ('in-portal/admin'), otherwise you will not be able to access some of the very important functionality.

The pop-ups usually act as selectors of various information. For example, when you need to set the owner for an item, a little 'User' icon will pop-up a list of all system users. The list should be already familiar to you, as it closely resembles the main list of users in the Community section.

It is very easy to work with pop-ups. Once you made up your mind about the selection, simply choose the appropriate radio button, or check the appropriate check boxes, and click the 'Ok' button (green check mark icon). If you click the 'Cancel' button, or just close the pop-up, your selection will be ignored. The radio buttons appear, when you can only choose one item for the underlying field. The check boxes appear, when you can make a multiple selection.

The pop-ups are not modal – meaning that we do not force them to stay at the top of your screen. You can go back and forth between the main console window and a pop up. Please avoid leaving the pop-ups open when you are done working on a form or in a section. Having multiple pop-ups will quickly lead to confusion. Moreover, once you close the form, you will no longer be able to accept the selection.

5.1.8. Lists

The lists are another very common control in the administrative console. They provide a very useful way to manage a large amount of data. All lists in the In-portal platform and all of the modules use the same interface.

At the top left of a list you will find the page navigator. The current page number is highlighted, and cannot be clicked. The other page numbers are clickable, and will take you to that page. You will see at most ten page numbers at a time. When there are more then ten pages, there will be a '>>' sign, clicking on which will scroll ten pages over, and show you the middle page of the set. You will also see a '<<' sign to go ten pages back.

At the top right of a list you will see a search box. If you enter a keyword and press enter, or click on the 'Search' button (magnifying glass icon), the list will perform a search for your keyword or phrase in all text columns that are searchable, and show you the results. The title of the section will reflect the number of search results obtained. Clicking on the 'Reset' button (magnifying glass with a red cross icon) will reset the list back to the original state, showing all items. Please keep in mind, that just like the view menu, the searches are session-persistent. Meaning that if you perform a search, then move on to the next section, and then come back to this list later, but before logging out, you will see the search results instead of all items.

The column headers of the list will describe the columns of data that are displayed in the list. The green triangular buttons next to the column headings are the sort buttons. If the triangle is pointing to the right, it means that the data is not sorted by that column. If the triangle is blinking, it indicates that this column is being sorted by. An upward pointing triangle designates an ascending sort order, and downward pointing – descending. Please keep in mind, that there are other factors affecting the sort – such as the priority described in the section 5.1.5 above.

5.2. In-portal Platform

This section will provide you with a page-by-page walkthrough of the Administrative Console of the In-portal platform, describing the purpose of each page and the fields on it.

5.2.1. Structure & Data
5.2.1.1. Catalog

The catalog allows you to navigate the tree of the categories. You will see a navigation bar at the top, which will show you the current category you are in. You may click the category names in the navigation bar to quickly jump up the tree. You may also use the 'Up' button (yellow folder with a green up arrow icon) in the toolbar to go one category up, or the 'Home' button (house icon) to go all the way up to Home – the root category. To go deeper in the tree, simply click on the desired category.

Inside the category, you will see all its subcategories in the top tab, and the items in the bottom tabs.

In this catalog screen, you can create new categories (icon with the folder and a little sun), edit the current category you are in (icon with the folder and a green check mark), create new items (icon looks like the item element icon with a little sun), edit selected categories or items (green check mark) or delete the selected categories or items (red X sign).

The categories are displayed in two columns. First there is the control check box, then the category icon, also showing the state of the category (new, pending, disabled, etc.), then the category name, then the text state (top, pop, new, editor's pick) and the number of subcategories and items that it contains, in parenthesis. Below the category name there is its description and the creation date.

5.2.1.1.1.   Managing Categories

When you create a new category, or edit an existing one, you will move to a different section. This section displays all of the information about the category, divided into tabs.

5.2.1.1.1.1.   General

- Enable HTML? – this check box enables or disables HTML code in the category name and the category description. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is very important, since some HTML tags can break the page layout, and in some instances can be a security weakness (the Java Script, for example).

- Category ID - this is a read-only field that displays the internal system ID. It is of a small importance, other than the fact that it's a truly unique identifier of a category – there can never be two categories with the same ID.

- Name - this is the category name

- Description - this is the category description

- 'Editor' – this icon that looks like a notepad and a pen, will pop up the online HTML editor for the category description. It will only work if the Enable HTML check box is checked.

- Status – this is the category status.

- New – this is the control for the 'New' flag. The 'auto' setting will let the system set the 'new' flag automatically, based on the number of days since its creation and a setting; 'always' will enable the flag, and 'never' will disable it.

- Editor's Pick – this sets the Editor's pick flag.

- Created on – this is the creation date. Either it can be entered directly into the field, or you can use the calendar tool to select a date. The 'Calendar' button is an icon to the right of the field that looks like a date book page. To the right of the 'Calendar' button there is a hint that shows the current date format. This format may change, if a different Regional package is activated.

- META keywords – this field contains the META keywords that will be displayed on the front end of the In-portal site, in the special HTML "meta" tags. These particular keywords will be displayed when the current category is entered.

- META description – similar to the META keywords, but for the META description HTML tag. Both are useful for search engine recognition of the page, as well as alternative descriptions of the category that will not be visible to a human visitor.

5.2.1.1.1.2.   Relations

This page contains a list of all relations of this category. To create a new relation, click the 'New' button (two opposite green arrows with a sun). This will pop up a category picker, where you can choose one category.

- Relation ID – a read-only field, the internal system ID of the relation, guaranteed to be unique throughout the system. It is blank when a new relation is created.

- Item – a read only field, the destination item type 'category'. Categories can only be related to categories.

- Type – 'reciprocal' designates a two-way relation, and 'one way' – a one-way relation.

- Enabled – the status flag of the relation.

- Priority – the numerical priority of the relation.

5.2.1.1.1.3.   Images

This tab contains all images associated with the category. To create a new image, click on the 'New' button (the icon like the Windows GIF icon with a little sun). This will open a new page where you fill out the image details.

- Image ID – a read-only field, the internal system ID of the image, guaranteed to be unique throughout the system. It is blank when a new image is created.

- Name – this field contains the image name, used in In-tags to designate the image.

- Alt Value – this field contains the text value, which will be displayed in the 'alt' tag of the image on the front end, inside the page HTML code, and when a mouse pointer is hovered over the image (in Internet Explorer).

- Status – this field contains the status of the image, enabled or disabled.

- Primary – this flag designates the primary image. There can be only one primary image per list (for one category). When you check this box on an image, the previous primary image is unset (if there is more than one image in the list).

- Priority – this field contains the numerical priority of the image.

- Thumbnail location (upload from PC) – Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the 'in-portal/kernel/images' directory.

- Thumbnail location (remote URL) – Here you can enter a remote URL address of an image. It will be linked from the remote server.

- Same As Thumbnail – This check box sets the full-size image to be the same as the thumbnail image. When this option is checked, you cannot upload a full-size image.

- Thumbnail location (upload from PC) - Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the `in-portal/kernel/images` directory.

- Thumbnail location (remote URL) - Here you can enter a remote URL address of an image. It will be linked to from the remote server.

5.2.1.1.1.4. Permissions

This tab allows you to control the permissions of the current category. The first list displays all groups, which have permissions already associated with this category. If a group is not shown, that means that its permissions will be inherited from the parent category. To add a new group definition, click on the 'New Permission' button (icon with a yellow lock and a little sun). A new page will pop-up, prompting you to select the group, which you want to add. Only those groups will be shown which don't yet exist in the group list.

Once you add or edit a group, you will be directed to the page defining the permissions. The permissions are broken down by type, one for the In-portal platform permissions, and one for each of the installed modules. The 'Inherited' check box specifies that a particular permission is inherited from the parent, and therefore cannot be defined for this category. The 'Access' check box shows whether a permission is set or unset in the current category. Next to the check box, you will also see a green or a red circle. These circles indicate the active permission state for the category – red means unset, and the green – set. This is especially useful in for the inherited permissions – you do not have to look up the parent category to find out what the value of a particular permission is. The last column, 'Inherited From', shows the category name and full path that defines the permission for the current category. It may be an immediate parent, or any other grandparent category in the tree – all the way up to the 'Home' category. The 'Home' category does not have the inheritance options, since it is the highest category in the tree, and does not have any other category to inherit the settings from. The list of In-portal platform permissions is as follows:

- View Category – controls whether a user can view the subcategories in this category.

- Add Category – controls whether a user can add categories inside this category.

- Delete Category – controls whether a user can delete categories inside this category.

- Add Pending Category – controls whether a user can add categories inside this category, but in pending mode – awaiting administrator's approval before they become active.

- Modify Category – controls whether a user can modify categories inside this category.

- Allow favorites – controls whether a user can utilize the Favorites function on the items in this category. The favorites feature works like a bookmark – it allows users to mark the items they find useful, and they will be displayed in 'My Favorites' section in their account on the front end.

5.2.1.1.1.5.   Custom

The custom tab displays all custom fields defined for categories, and allows the administrator to edit them. The custom fields are set up on the Custom Settings page, described in the section 5.2.1.6 of this manual.

The only information that can be entered for a custom field is the 'Value'.

5.2.1.1.2.   Managing Items

The bottom portion of the catalog section shows all items in the current category, and allows the administrator to manage them. The items are separated into different tabs, by item type (which module they belongs to). For specific Item help, please see the appropriate module help below in this manual.

5.2.1.2.   Advanced View

The Advanced View section allows you to manage categories and items across all categories. This is especially useful, when you are looking for a particular category or item, if you do not know their location (in which category they are located). One of the most common ways to use the Advanced View section is to review pending items. To do this, simply use the View menu to filter only Pending items of each type.

In the Advanced View section, you can only manage existing items – delete, edit, approve or deny them. All these actions are the same in this section as they are in the Catalog. To add a new item, please use the Catalog section.

The Advanced View allows you to filter using the View menu and Search, similar to the Catalog section. The essential difference is that while in the Catalog the filtering options only apply to the current category you are looking at, in the Advanced View section they apply to all of the items of each type.

The section is divided into tabs, a tab for Categories, and a tab for each module installed on your system. Each tab retains its individual filter settings (Search keyword and View menu options).

5.2.1.3.   General Settings

This section allows the administrator to define the default values for various In-portal platform settings.

- Order categories by – this setting specifies the default primary sort order for category listings. It applies both on the front end, and in the administrative console – in the catalog. The first dropdown allows to select the field (an attribute of the category element), and the second dropdown – the direction.

- And then by – this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are

ambiguous. For example, when the primary sort value is 'Category Name', the secondary order will be used to sort among categories with the same name.

- Number of categories per page – specifies the default number of categories shown per page. This value applies both to the front end and to the administrative console. In the latter, this value can be changed for each session through the View menu.

- Categories Per Page (Shortlist) – this setting is similar to the 'Number of categories per page', but it applies to the front end, short category lists only. It can be overridden by setting the tag attributes in the appropriate templates.

- Number of days for a cat. to be NEW – specifies the number of days, from the date of creation, during which the category will be automatically marked 'New' by the system. This setting will only apply to the categories with the 'New' flag set to 'Automatic'.

- Display editor PICKs above regular categories – this setting will force all categories, marked as 'Editor's pick' to be displayed above the other categories, regardless of their priority or sort order. Among themselves, 'Editor's pick' categories will be sorted according to the regular rules.

- Root category name (language variable) – this setting specifies the name of the language variable which contains the name of the root category. By default, the root category name is 'Home' in English, and the label name is `lu_rootcategory_name`. There is rarely a need to change the name of the variable – since the name of the category itself can be simply changed by changing the value of the variable.

- Default META Keywords – this field contains the default META keywords value, which is displayed on the home page, or whenever a category does not have them defined. For more information, see the section describing General Category settings - 5.2.1.1.1.1.

- Default META description - this field contains the default META description value, which is displayed on the home page, or whenever a category does not have them defined. For more information, see the section describing General Category settings - 5.2.1.1.1.1.

5.2.1.4. Search Settings

This section allows the administrator to configure the front-end search options, and the advanced search options.

At the top, this section lists all fields, representing category attributes. Next to each field, there is a 'Simple Search' checkbox, which includes this field in the simple search query. By default, only the 'Name' and the 'Description' fields are included. In general, it makes sense to include only the fields, which may contain text in them, otherwise when a visitor searches for a text keyword, the non-textual fields will be not searchable. Next, there is a 'Weight' text box, in which the administrator can designate the importance of each field during a search. The fields with a larger weight will be more important then the fields with

the lower weight. This is used when calculating the category relevance to the search keyword, for sorting of the results. The last column is the 'Advanced Search' check. It designated whether a particular field should be displayed on the 'Advanced Search' page, and should the visitors be able to search on it. By default, all fields are included.

Below the list of fields are the Category Relevance settings.

- Increase importance if field contains a required keyword by – this specifies the percentage by which the weight of a field will increase, when a required keyword is found in that field. A required keyword is one that is preceded with a '+' in the search key phrase.

- Search Relevance depends on _ % keyword – the percentage of relevance that comes from the keyword being found in that category.

- Search Relevance depends on _ % popularity - the percentage of relevance that is based on the category popularity.

- Search Relevance depends on _ % rating - the percentage of relevance that is based on the category rating.

Below, the same forms repeat for user fields and for category custom fields, along with their respective relevance settings. Some of the search settings are not used in the current version – they are reserved for a future use.

5.2.1.5.   E-mail Settings

This section lists all possible In-portal platform category events. Each event has a description, a type – 'User' or 'Admin', a status – 'Enabled', 'Front-end Only', and a 'From/To User'. The description hints about when the event occurs. The type indicates whether the email notification will be sent to the front-end user, or the administrator. The status 'Enabled' signifies that the email notifications for this event are enabled for both the front-end and the administrative console. The Front-end Only' status means that the notifications will be sent only when the event occurs on the front end. The 'Disabled' status means no notifications will be sent when this event occurs. The 'From/To User' field specifies the 'From' email for front-end user notifications, and the 'To' email for the administrative notifications. The other, matching pair of addresses ('To' for the front, and 'From' for the admin) is automatically determined by the system based on who initiated the event. The event notification status can be changed by clicking on the toolbar buttons – 'Enable' to enable the notification, 'Disable' to disable it, and 'Front Only' (icon with a monitor) to set to 'Front-end Only' status.

5.2.1.6.   Custom Fields

This section allows the administrator to manage the category custom fields. The category custom fields are useful when you need to store additional information about the categories. In the earlier example about a directory of cars, the categories may have such custom fields, as the engine displacement range, price range, years of manufacturing of the model, etc. All custom fields will be automatically used in the administrative console, in the Category Management section. You will need to edit the theme templates for them to appear on the front-end.

- Field Id – this is a read-only field displaying the unique system ID of the custom field.

- Field Name – sets the internal name of the custom field. This is the name you would use to refer to the custom field in the In-tags when designing templates.

- Field Label – this is a read-only field, which displays the language variable name associated with the label of that field, and the value of the variable in the current language (after the colon). The label is used on the front end, and in the administrative console, to describe the field to the user who is entering information into it.

- Show on the general tab – this setting controls whether the custom field will be also displayed on the General tab in the administrative console, when editing the categories. It is a short cut for frequently used custom fields. All settings below apply only when this is checked.

- Heading – this field contains the language variable of the section heading, under which the field appear on the general tab.

- Field Prompt – this field contains the language variable, which text will appear as the hint bind the field.

- Input Type – this drop down allows the administrator to designate the type of the information stored in the custom field, by specifying the HTML control to be used on the General form.

- List of Values – this field contains all choices for the above HTML controls of type 'radio button' or 'drop down'. The choices must be in the format: "value1 = language variabe1, value2=language variable2". For example, to create a drop down with three choices (One, Two, Three) and their respective numerical values, this field would contain the following: "1=la_one,2=la_two,3=la_three).

5.2.2. Community
5.2.2.1. Users

This section lists all In-portal users. It allows managing users, setting primary group for a user, approving and disabling users, banning users and sending out mass emails to the users.

5.2.2.1.1. Managing Users

5.2.2.1.1.1. General

This form contains all of the user information.

- Username* - this field contains the unique user name.

- Password – this field contains the user password. When editing an existing user, the password field will be blank. Leave it blank, if you do not want to change the password. For extra protection, nobody can see the user's existing password, including the administrator. The password can only be reset (either in this from, or from the front – end, the 'Forgot Password' function.)

- Repeat Password – this field is used when resetting the user's password. Please re-type the password entered in the field above. If the passwords don't match, an error will occur and you will not be able to save the form.

- First Name – this field contains user's first name.

- Last Name – this field contains user's last name.

- Email* - this field contains user's email address. It is a required field, because without it the user will not be able to reset their password and receive the system email notifications.

- Date of Birth* - this field contains the user's date of birth. It is a required field, due to United States COPPA regulations, which state that all persons under the age of 13 must obtain parental consent before submitting their personal information on a web site. For more information about COPPA, please visit http://www.ftc.gov/bcp/conline/pubs/buspubs/coppa.htm. The date can be either entered manually, in accordance with the date format of the current regional package, or selected with the help of the calendar tool to the right of the field.

- Phone - this field contains user's phone number.

- Street - this field contains user's street address.

- City - this field contains user's city.

- State - this field contains user's state or province.

- Zip - this field contains user's postal code.

- Country - this field contains user's country.

- Status – this flag contains the user's status – enabled, disabled or pending.

- Created On - this field contains the date when the user was created. The date can be either entered manually, in accordance with the date format of the current regional package, or selected with the help of the calendar tool to the right of the field.

5.2.2.1.1.2.   Groups

This tab allows the administrator to assign the user to one or more groups. It also lists all groups to which the user is currently assigned, along with the user count in each group.

To assign a new group, click on the 'Add User to Group' button (user icon with a green arrow to the right). This button will pop-up a group selector.

5.2.2.1.1.3.   Images

This tab contains all images associated with the user. To create a new image, click on the 'New' button (the icon like the Windows GIF icon with a little sun). This will open a new page where you fill out the image details.

- Image ID – a read-only field, the internal system ID of the image, guaranteed to be unique throughout the system. It is blank when a new image is created.

- Name – this field contains the image name, used in In-tags to designate the image.

- Alt Value – this field contains the text value, which will be displayed in the 'alt' tag of the image on the front end, inside the page HTML code, and when a mouse pointer is hovered over the image (in Internet Explorer).

- Status – this field contains the status of the image, enabled or disabled.

- Primary – this flag designates the primary image. There can be only one primary image per list (for one category). When you check this box on an image, the previous primary image is unset (if there is more than one image in the list).

- Priority – this field contains the numerical priority of the image.

- Thumbnail location (upload from PC) – Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the 'in-portal/kernel/images' directory.

- Thumbnail location (remote URL) – Here you can enter a remote URL address of an image. It will be linked from the remote server.

- Same As Thumbnail – This check box sets the full-size image to be the same as the thumbnail image. When this option is checked, you cannot upload a full-size image.

- Thumbnail location (upload from PC) - Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the 'in-portal/kernel/images' directory.

- Thumbnail location (remote URL) - Here you can enter a remote URL address of an image. It will be linked to from the remote server.

5.2.2.1.1.4.   Permissions

The permissions tab allows the administrator to assign individual permissions to the user. This is recommended only for exceptional situations, as it complicates user permission management. The standard way of assigning permissions, is to configure a group with the desired set of permissions, and then assign the user to it.

The permissions are broken down by type, one for the In-portal Administrative Console permissions, and one for the front-end. The 'Inherited' check box specifies that a particular permission is inherited from a group that this user belongs to, and therefore cannot be defined for this user. The 'Access' check box shows whether a permission is set or unset for the current user. Next to the check box, you will also see a green or a red circle. These circles indicate the active permission state for the user – red means unset, and the green – set. This is especially useful in for the inherited permissions – you do not have to look up all of the groups this user belongs to, to find out what the value of a particular permission is. The list of the administrative console permissions is as follows:

- Admin Login – this permission allows the user to log in, and to use the administrative console. This permission should be assigned with caution.

- Append phpinfo to all pages (Debug) – All permissions, marked with (debug) are used for testing purposes when the code has been modified. They are not necessary, and sometimes distracting, for the daily usage of the console. This permission will display the PHP info page at the top of each page.

- Change User Profiles – this permission will allow the user to view and change other users' profiles on the front end.

- Display Item List Queries (Debug) – this debug permission will display the SQL queries above on each list page, after each list operation is performed.

- Display Item Queries (Debug) – this debug permission will display the SQL queries for all other actions.

- Show Language Tags – this permission will show undefined language variables in the administrative console as links. The link will open up a pop-up for creation of that language variable in the current regional pack. This is a useful permission for enhancing and debugging translations.

- Read-Only Access To Database – this permission will take away user's ability to modify any information in the database when using the Administrative Console. It is useful for demonstration purposes, as well as for setting up administrators who are only supposed to monitor information without actually changing it.

The list of the front-end permissions is as follows:

- Allow Login – this permission will allow a registered user to log into the front end of the In-portal site. It is equivalent, for all intents and purposes, to setting a front-end only user's status to 'Pending' or 'Disabled'. The only difference is for users with administrative privileges – 'Pending' or 'Disabled' user will not be able to log into the administrative console as well, regardless of their 'Admin Login' permission setting.

5.2.2.1.1.5. Items

This tab lists all items owned by the user. Each item's name and type is displayed. It is not possible to add or remove items on this tab – it must be done through the 'Edit' form of each specific item. The link on the item's name will pop up the 'Edit' form as a short cut.

5.2.2.1.1.6. Custom

The custom tab displays all custom fields defined for users, and allows the administrator to edit them. The custom fields are set up on the Custom Fields page, described in the section 5.2.2.5 of this manual.

The only information that can be entered for a custom field is the 'Value'.

5.2.2.1.2. Primary Group

'Set Primary Group' button (a group icon with a yellow exclamation) pops up a group selector. The administrator can pick one group, which will be set as the primary group for

the selected users. The primary group is used for permission conflict resolution – when a user belongs to two or more groups, and their permissions are conflicting for the same category, the Primary Group permission will take precedence.

5.2.2.1.3. Banning Users

'Ban User' button (a user icon with a red crossed circle) allows the administrator to set up a Ban Rule based on the information of the selected user. This button opens the Add ban rule form, with the user's information pre-filled for convenience. For more information about Ban Rules, please refer to section 5.2.2.6.

5.2.2.1.4. Mass Mail

'Send E-mail' button (envelope icon with a yellow arrow to the right) allows the administrator to send an email to one or more users. This button pops up a new form, where the email is created. The subject and the attachment fields are standard, as in any conventional email client. The body of the email can be in plain text, which goes into the text area called 'Text Version', or HTML, which goes into the text area called 'HTML Version'. The HTML version also has an online editor available.

5.2.2.2. Groups

This section lists all user groups and allows the administrator to manage them. It also displays the member count for each group.

5.2.2.2.1. Managing Groups

5.2.2.2.1.1. General

The general tab lists all general group information.

- Group Name* - this field contains the required name of the group. Everywhere in the Administrative Console, the groups are referred to by their names. The group name must be unique.

- Comments – this field contains notes, visible only to the administrator and only on this page. They are useful for keeping short descriptions about the group and its purpose.

5.2.2.2.1.2. Users

This tab lists all group members. It also allows to add a new member to the group and to remove the existing members. To add a new member, click on the 'Add User to Group' button. A new page with a list of all users will pop up.

5.2.2.2.1.3. Permissions

The permissions tab allows the administrator to assign permissions to the group. This is the recommended way of managing user permissions.

The permissions are broken down by type, one for the In-portal Administrative Console permissions, and one for the front-end. The 'Access' check box shows whether a permission is set or unset for the current group. Next to the check box, you will also see a green or a red circle. These circles indicate the active permission state for the group – red

means unset, and the green – set. The list of the administrative console permissions is as follows:

- Admin Login – this permission allows the group member to log in, and to use the administrative console. This permission should be assigned with caution.

- Append phpinfo to all pages (Debug) – All permissions, marked with (debug) are used for testing purposes when the code has been modified. They are not necessary, and sometimes distracting, for the daily usage of the console. This permission will display the PHP info page at the top of each page.

- Change User Profiles – this permission will allow the group member to view and change other users' profiles on the front end.

- Display Item List Queries (Debug) – this debug permission will display the SQL queries above on each list page, after each list operation is performed.

- Display Item Queries (Debug) – this debug permission will display the SQL queries for all other actions.

- Show Language Tags – this permission will show undefined language variables in the administrative console as links. The link will open up a pop-up for creation of that language variable in the current regional pack. This is a useful permission for enhancing and debugging translations.

- Read-Only Access To Database – this permission will take away user's ability to modify any information in the database when using the Administrative Console. It is useful for demonstration purposes, as well as for setting up administrators who are only supposed to monitor information without actually changing it.

The list of the front-end permissions is as follows:

- Allow Login – this permission will allow the group member to log into the front end of the In-portal site. It is equivalent, for all intents and purposes, to setting a front-end only user's status to 'Pending' or 'Disabled'. The only difference is for users with administrative privileges – 'Pending' or 'Disabled' user will not be able to log into the Administrative Console as well, regardless of their 'Admin Login' permission setting.

5.2.2.2.2. Mass Mail

'Send E-mail' button (envelope icon with a yellow arrow to the right) allows the administrator to send an email to all of the group members. This button pops up a new form, where the email is created. The subject and the attachment fields are standard, as in any conventional email client. The body of the email can be in plain text, which goes into the text area called 'Text Version', or HTML, which goes into the text area called 'HTML Version'. The HTML version also has an online editor available.

5.2.2.3. General Settings

This section allows the administrator to define the default values for various community settings.

- Allow new user registration – this flag sets the user registration mode for the system. 'Instant' setting will allow the visitors to register and become users automatically. This is useful for the web sites will a large amount of users, whose administrators do not want to control each individual user.

- Minimum user name length – this field sets the minimum user name length acceptable for the front-end registration. This restriction is not in effect when a user is created through the administrative console.

- Minimum password length – this field sets the minimum password length acceptable for the front-end registration. This restriction is not in effect when a user is created through the administrative console.

- Assign registered users to group – this dropdown allows to select the default group, to which all newly registered users are assigned.

- Assign users not logged in to group - this dropdown allows to select the default group, which manages permissions for all guests – site visitors who have not logged in.

- Assign mailing list subscribers to group - this dropdown allows to select the default group, to which all of the users who sign up for a mailing list will be assigned.

- Assign password automatically - this option will let the In-portal platform automatically generate random passwords for new users, and send them to the user in the registration email. This is a good way to verify the existence of a user's email – if they do not receive the email with the password, they will not be able to log in. The users will be able to set their own password later.

- Root Password – this field allows the administrator to change the root user's password. Leave this field blank to keep the existing password. Please remember that root user has the highest-level security access, and that his password cannot be retrieved. Please take extra caution not to forget or disclose this password.

- Verify Root Password – this field is used to verify the root password when it is being changed. If the text in this field does not match with the text in the 'root password' field, the password will not be changed and an error will occur.

- Number of days to deny multiple votes from the same user - this setting controls how often the same user can vote on the same resource or item. For example, if you set it to 3 days, a user will not be able to vote on the same link for 3 days after their first vote.

- Number of days to deny multiple reviews from the same user - this setting controls how often the same user can create reviews for the same item. For example, if you set it to 3 days, a user will not be able to create a new review for the same link for 3 days after their first one.

5.2.2.4. E-mail Settings

This section lists all possible community events. Each event has a description, a type – 'User' or 'Admin', a status – 'Enabled', 'Front-end Only', and a 'From/To User'. The description hints about when the event occurs. The type indicates whether the email notification will be sent to the front-end user, or the administrator. The status 'Enabled' signifies that the email notifications for this event are enabled for both the front-end and the Administrative Console. The Front-end Only' status means that the notifications will be sent only when the event occurs on the front end. The 'Disabled' status means no notifications will be sent when this event occurs. The 'From/To User' field specifies the 'From' email for front-end user notifications, and the 'To' email for the administrative notifications. The other, matching pair of addresses ('To' for the front, and 'From' for the admin) is automatically determined by the system based on who initiated the event. The event notification status can be changed by clicking on the toolbar buttons – 'Enable' to enable the notification, 'Disable' to disable it, and 'Front Only' (icon with a monitor) to set to 'Front-end Only' status.

5.2.2.5. Custom Fields

This section allows the administrator to manage the user custom fields. The user custom fields are useful when you need to store additional information about the users. A good example of a user custom field would be their Instant Messenger nickname. All custom fields will be automatically displayed in the administrative console, in the User Management section. You will need to edit the theme templates for them to appear on the front-end.

- Field Id – this is a read-only field displaying the unique system ID of the custom field.

- Field Name – sets the internal name of the custom field. This is the name you would use to refer to the custom field in the In-tags when designing templates.

- Field Label – this is a read-only field, which displays the language variable name associated with the label of that field, and the value of the variable in the current language (after the colon). The label is used on the front end, and in the administrative console, to describe the field to the user who is entering information into it.

- Show on the general tab – this setting controls whether the custom field will be also displayed on the General tab in the Administrative Console, when editing the users. It is a short cut for frequently used custom fields. All settings below apply only when this is checked.

- Heading – this field contains the language variable of the section heading, under which the field appear on the general tab.

- Field Prompt – this field contains the language variable, which text will appear as the hint bind the field.

- Input Type – this drop down allows the administrator to designate the type of the information stored in the custom field, by specifying the HTML control to be used on the General form.

- List of Values – this field contains all choices for the above HTML controls of type 'radio button' or 'drop down'. The choices must be in the format: "value1 = language variabe1, value2=language variable2". For example, to create a drop down with three choices (One, Two, Three) and their respective numerical values, this field would contain the following: "1=la_one,2=la_two,3=la_three).

5.2.2.6.   User Ban List

This section allows the administrator to manage the ban rules. The ban rules are used to filter user registrations automatically, using various criteria. This is useful, when the site administrator does not want a certain person, or a group of people, to register on the In-portal site, however does not want to review all registrations manually. This seemly straightforward task is actually very difficult to do on the Internet. There is no bulletproof way to identify a real person when they are registering online; one has only indirect information to rely on – the information that the person submits or has the ability to change. Therefore, the idea behind banning is to create as many accurate rules as possible that would filter out the majority of the unwanted people.

This section also allows the administrator to execute selected rules on the existing user database, banning the users, which fall under those rules, but registered before the rules where created and enforced.

When a new user registration is banned, the visitor will receive an error message, and will not be able to complete the registration. When an existing user is banned, they are disabled.

The ban rule form has the following fields:

- Rule Type – this field designated the type of the rule. There are 'Deny' rules and 'Allow' rules. The 'Deny' rules, when they match a user record, deny the registration. The 'Allow' rules work in the opposite way – when such rule is matched with a user record, the user registration is allowed. The conflicts between allow and deny rules are resolved based on the priority of each rule. (Conflicts occur, when one or more opposite rules match the same user record).

- Item Field – this drop down selects the User attribute, which is going to be matched against the rule value.

- Field Comparison – this drop down selects the type of the match, in other words the comparison operation that will be performed. The match types do what their names mean. Please use the 'Any' type with extra caution. It does not perform a comparison, but instructs the rule to match all user records, regardless of any other options.

- Field Value* - this field contains the value that will be used when matching the rule.

- Error Tag – this field contains the name of the language variable that contains the text, which will be displayed on the front-end, when a user registration is denied due to this rule. Leave it blank, if you do not want to provide an error message. Please keep in mind, that it is theoretically possible that a rule will deny registration to a person you did not intend to be banned, and design the error messages accordingly.

- Priority – this field sets the priority of the rule, which is used for resolving the conflicts when more than one rule is matched with the same user record.

- Status – this field enables and disabled rules.

For example, you as a site administrator, notice that there is a person that registers with "ACME Corp" words in their user name, email, first and last names, etc. You suspect that this user is trying to advertise their company, and you want to prevent them from using your site in that way. However, you are not sure, what exact names this person will use in the future – all you know is that they want to include the company name – ACME. In this situation, you would set up three ban rules. They will be of type 'Deny', on Item fields 'User name', 'First name' and 'Last name', using Field Comparison 'Contains', and the Field Value 'ACME'. Optionally, you can create a message for that person, for example "Sorry, no ACME advertising allowed on this site." The priority is not important in this case, because a match on any of the three fields is sufficient to ban the user. The status should be set to 'Enabled'. Now, that person will not be able to register with the word 'ACME' in their user name, or first or last name. You may also want to run these three rules on your existing user database, in case you missed some of the previous registrations by that user.

5.2.3. Modules & Settings

This section provides the administrator with an overview of the modules installed on the In-portal Platform. It also contains sub-sections, one for each module, where the module-specific settings are located.

To add a new module to your system, please upload the appropriate module program files into your `in-portal` directory and upload all of the module templates into the theme you are planning to use. Then click on the 'Add Module' link. The page will show you a list of all modules, detected on your system, with a link to install the new one(s). Simply click the link, and the module will be installed.

To disable or enable an installed module, follow the 'Enable/Disable Modules' link. The page will show you a list of all modules installed on your In-portal platform, and in the toolbar you will find the buttons to enable and disable your modules. Please be careful when disabling a module – this option will hide all module-specific sections from your administrative console, and it will also disable all module's templates on the front-end, which may lead to undesired effects on your public web site.

You can access the current In-tag library on this page as well. Click on the 'Tag Library' link, and you will be taken to a page with a complete list of all In-tags currently supported by your system, description of their attributes and functionality.

5.2.4. Summary & Logs
5.2.4.1. Summary

This section provides the statistical information about your In-portal platform and all installed modules. All of the values are automatically updated as you enter the section. If you want to see the most current value of any statistics, please use the 'Refresh' button (icon with two revolving green arrows).

5.2.4.2. Search Log

This section displays a list of all key words and phrases that have been searched for on the front-end. You can refresh this information by clicking the 'Refresh' button, or delete one or more entries by clicking the 'Reset' button (a recycling bin icon with a red x).

The Search Type column specifies whether the keyword was used in the simple or in the advanced search form. The Keyword column contains the literal text that was searched, and the Frequency column shows the number of searches performed since the last time you have deleted this keyword or phrase from the log.

The keywords are logged regardless of whether the search has found any results, or any further action was taken. The logging occurs the moment a front-end user clicks on the 'Search' button.

5.2.4.3. Session Log

This section shows the administrator all currently active sessions in the system. The administrator can refresh this information by pressing the 'Refresh' button, or delete one or more sessions by pressing the 'Reset' button (icon with an unplugged power plug.)

Deleting the session will cause the user to be logged out as soon as they click on anything or refresh the page. All of the information they were working on will be lost. This function applies both to the front-end and administrative console user sessions, and it should be used with great caution, only in exceptional circumstances.

Please note that root sessions (when the 'root' user is logged in) are not displayed in this list; they cannot be deleted as well.

- User name – this column shows the user name of the logged in user, or 'Guest' for site visitors.

- Primary Group – this column shows the primary group of the logged in user, or 'Guest Users' for site visitors.

- Status – in the current version of In-portal platform, the only session status is 'Active'.

- IP Address – this column shows the IP address from which the user or site visitor is using the In-portal front-end or administrative console.

- Created On – this column shows the date when the session was created.

5.2.5. Configuration
5.2.5.1. General

This section allows the administrator to update the system settings of the In-portal platform.

- Web address – this field contains the full directory path where your In-portal system is located. That's the text that comes after the domain name in the URL where your In-portal system will be running. Example: if the URL is http://www.in-portal.net/demo/, then the full path is `/demo/`. Please note, that the beginning and the trailing slashes are required. If you are able to log into the administrative console and see this section, this means that this setting is setup correctly and does not need changes.

- Website name – this field contains the visual name of your site – it will appear in the browser title bar on the front end, and in your administration panel. You can choose anything you would like here.

- Session Management Method – this field specifies the session management mode for your In-portal system. The 'Query String' method passes the session ID in all of the links on the site. This is the method, most compatible with the browsers, but it has a drawback – the session ID in the URL cannot be spidered by a search engine crawler. Therefore, if you want your site to be recognized by the search engines such as Google, MSN, etc. you will need to avoid this setting. The 'Cookies' setting is the most search-engine friendly setting, but it will work only for browsers enabled with cookies. If a visitor comes to your site without the ability to store cookies, they will not be able to log in, or use any advanced functionality with this setting. The 'Automatic' choice attempts to detect cookies and search engine spiders, and switch to the appropriate mode. Ideally, this would be the most convenient setting, however due to the unpublished search engine features, we cannot guarantee its accuracy.

- Session Inactivity Timeout (seconds) – this field contains your session expiration time. If a user (on the front-end or in the admin) is not active for longer then this period, they will be automatically logged out. This is an important security feature, and it is not recommended to change the session expiration to more than 3600 seconds (1 hour).

- Enable Tag Caching – this setting controls the template caching mechanism utilized by the In-portal system. It is an experimental feature that will cache the HTML of a dynamically generated page and use it for a preset period instead of re-generating it on the fly for every user. The advantage of this function is a tremendous reduction in the server load (especially the database server), and a great improvement of the site load speeds, given the same web server hardware and software. The disadvantage is that some users will see information that may not be completely up to date (it could be delayed for up to an hour). If you have any further questions about this feature, or if you are experiencing unusual results while using this feature, please contact our support through My Account section located at http://www.intechnic.com/myaccount.

- Use non-blocking socket mode – this setting is applicable only to the Link Validation tool in the In-link module, for the current version of the In-portal Platform. Different versions of PHP scripting language require different socket settings for the timeout detection to work properly. During the installation, In-portal platform attempts to detect this automatically and set this setting to its appropriate value. In very rare occasions, this setting will need to be modified. For more information, or if you are experiencing a problem with the Link Validation tool, please contact our support through My Account section located at http://www.intechnic.com/myaccount.

- Time zone of the server – this setting controls the time zone your server is located in. This refers to the system time that your server will report to In-portal scripts. You can find out this information from your server administrator.

- Time zone of the site – this setting controls your time zone. This will determine what time zone you will see on all of the date/time stamps issued by the system.

- Mail Server Address - You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal. Enter the full domain name of the mail server, without anything in front of if (e.g. "mail.mailserver.com".) Leave it blank to use the default, built-in mail transport of your web server.

- Port (e.g. port 25) – this field contains the SMTP port of your external mail server. You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Server Required Authentication – the field tells In-portal if your SMTP server requires a user name and a password to send mail through it (this is common on the newer mail systems). You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Mail Server Username – this field contains the user name for your SMTP server. You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Mail Server Password – this field contains the password for your SMTP server. You need to fill out this field only if you are planning to use an external mail server for the outgoing mail generated by In-portal.

- Send HTML email – this option will enable HTML email to be generated and sent by the In-portal system. You will also have an option to send plain text emails on individual basis, so it is recommended to leave the default setting – 'On'.

- Additional Message Headers – this field contains additional email message headers that will be attached to all outgoing messages generated by In-portal. This is an advanced setting, and you need to know the exact formatting of the email headers to modify it.

- Messages from Site Admin are from – this field contains the email address that will appear as the FROM address on all automatically generated email messages. This should be a real email address to enable users to reply, and to receive failed message notifications. This field must be changed from its default value.

5.2.5.2. Themes

This section allows the administrator to manage themes of the In-portal platform. For more information about themes and templates, please read the section 4.2.5 of this manual.

5.2.5.2.1. Primary Theme

Every In-portal system has to have at least one theme, and at least one theme must be designated as the primary theme. The primary theme will be shown to all visitors by default, until they choose a different theme (if that option is offered by the system administrator). The primary theme setting has no effect on the Administrative Console.

5.2.5.2.2. Managing Themes

5.2.5.2.2.1. General

The general tab contains the information applicable to the entire theme.

- Theme Id – this read-only field displays the internal unique system theme ID.

- Name – this field contains the theme name. The name is used to refer to the theme on the front-end. It also has to match the directory under `'in-portal/themes'` where all templates for this theme will be stored.

- Description – this field contains the description of the theme. It is primarily for the administrator's internal notes about the theme, however it can be also displayed on the front-end.

- Enabled – this is the theme status.

- Language Cache Timeout – The tags, cached on a page, expire after this period (specified in seconds). The language caching is implemented to reduce the server load and speed up the page download times. It caches the values of the language phrases used on a given template, and uses the cache instead of evaluating the languages dynamically. This also means that if you modify a template, and add or remove some language labels, your changes will not take effect until after the cache refreshes. To disable the caching, set this value to zero. Under normal circumstances, we recommend keeping the language cache timeout setting at its default value of 3600 seconds (1 hour).

- Primary – this flag indicates whether the theme is primary or not. If you check it while editing a non-primary theme, the theme that used to be primary will no longer be – only one primary theme can exist in a system.

5.2.5.2.2.2. Templates

This tab lists all templates, which are a part of the theme, and allows the administrator to manage them. The button 'Preview' (template icon with a magnifying glass) opens the front-end in a pop-up window, so that the administrator can preview the changes made.

Since not all templates are describing entire pages, and some may even be not visible (a category element template, when there are no categories, for example), it is impossible to direct the preview to the specific template being modified.

The template creation and edit form has the following fields:

- File ID – this field is a read-only, unique and internal system template ID. It is also displayed in the URL as a part of the query string.

- File Name – this field contains the template file name. It is not possible to change the file name online. The name can be entered when creating a new template (it must be unique within the directory of the template), and it can be later changed via FTP or direct access to the web server.

- Description – this field contains the internal description of the template. It is not used on the front-end.

- Item Tags – this dropdown shows all available item attribute tags. An item attribute tag displays the value of the attribute for each given item in an element template. Not all attributes are applicable to all items.

- Global Tags – this dropdown shows all global system tags, for the In-portal platform and for each installed module. The global tags can be generally used in all templates, but in certain places they will not make sense.

- [Template Body] – this field has no label, but it is clear that it contains the actual body of the template.

5.2.5.3. Regional

This section allows the administrator to manage the regional packages (packs for short) of the In-portal platform. For more information about the packs, please read the section 4.2.6 of this manual.

5.2.5.3.1. Import

'Import a regional pack' button (globe icon with a yellow arrow pointing down) allows the administrator to install a new pack, or update an existing one. Each pack can be downloaded and stored as a file. The format of the file is XML, and the name of the language pertaining to the pack is built into the file. Therefore, it is not necessary to select a pack when performing an import – its name will be automatically determined from the pack file.

When importing a pack file, the administrator will need to upload it from the local computer by using the Browse button. Then the administrator should choose what types of phrases should be imported – 'Front-end', 'Administrator', or 'Both'. In this case, 'Both' does not mean 'Front-end' and 'Administrator', but it means the phrases of the type 'Both' (which are used on the front-end and in the administrative console). The option 'Overwrite Existing Phrases' will cause a replacement of all current phrases which are also found in the pack file being imported. It will not delete the language phrases, which are not found in the file. It is recommended to uncheck this option, to preserve any customized language values you may have.

At the end of the import, a page with the result will be displayed. If a language import fails, this is usually due to the fact that there are not sufficient directory privileges on the `'in-portal'` directory, and the platform cannot upload the file for temporary use.

5.2.5.3.2. Export

'Export' button (globe icon with a green arrow pointing out) allows the administrator to export a pack into a file. The file is first saved on the web server, and then it can be downloaded onto the workstation.

The first field to enter is the file name. The full path is shown to the left of the file name input field. Please ensure that this directory is writable to the web server, otherwise the export will fail.

Once the export is done, it will provide you with a link to download the file, or an error message, if the export failed.

5.2.5.3.3. Primary Region Package

Every In-portal system has to have at least one regional package, and at least one pack must be designated as the primary one. The primary pack will be used for all visitors by default, until they choose a different language (if that option is offered by the system administrator). The primary pack setting is also used for the Administrative Console, but can be changed by the administrative users for each session.

5.2.5.3.4. Managing Region Pack

5.2.5.3.4.1. General

The general tab contains the cultural settings of the pack.

- Language Id – this field is a read-only, unique and internal system regional package ID. It is also displayed in the URL as a part of the query string.

- Pack Name – this field contains the English name of a regional package, or any label the administrator wants to use for the pack.

- Local Name – this field contains the name of the regional package in the native language of the pack. For example, for a German regional pack, this field would be set to "Deutsch."

- Icon URL – this field contains the URL of the image, which will be used to display the regional pack designator icon (usually a country flag, associated with the pack's language). This may be a remote URL, or a local URL, in which case it should be relative to the `'in-portal/themes/[current theme]'` directory. The icon is necessary for the language selector in the default theme on the front end.

- Date Format – this field contains the date format of the regional pack. The information should be entered using standard programming codes for various formats of days, months and years. For more information about the date codes, please refer to PHP's web site:
http://us2.php.net/manual/en/function.date.php. The example to the right of

the field shows the resulting format of the current date. This example will update after you save the changes.

- Time Format - this field contains the time format of the regional pack. The information should be entered using standard programming codes for various formats of seconds, minutes and hours. For more information about the time codes, please refer to PHP's web site: http://us2.php.net/manual/en/function.date.php. The example to the right of the field shows the resulting format of the current time. This example will update after you save the changes.

- Decimal Point – this field contains the character that will be used for separating the decimal part from the whole number. For example, in the U.S. it is a period: "10.00" and in Europe, as well as other locals, it is a comma: "10,00".

- Thousands Separator – this field contains the character that will be used for separating the thousands in numbers.

- Enabled – this field is the regional pack status flag.

- Primary – this flag indicates whether the pack is primary or not. If you check it while editing a non-primary pack, the pack that used to be primary will no longer be – only one primary pack can exist in a system.

- Copy Labels to this Language – this is not an actual attribute of the regional pack, like the other fields on this form. It is a function that will copy all language phrases from another pack, designated in the drop down, into the current pack. It is useful for creation of new regional packs.

5.2.5.3.4.2. *Labels*

This tab displays all language phrases, or labels, of the regional package being edited. A label has the following fields:

- Phrase Id - this field is a read-only, unique and internal system language phrase ID.

- Label – this field contains the system name of the language phrase. This name is used in all templates, and in some settings. For visual convenience, all labels to be used on the front-end start with the prefix 'lu_', and all labels to be used in the administrative console start with the prefix 'la_'. The administrator may use their own conventions for naming the labels, however it is recommended to follow this naming rule to keep the regional pack compatible with the ones produced by Intechnic Corporation.

- Value – this field contains the label value in the local language of the pack. That is where the translation goes.

- Phrase Type – this field designates whether the label is to be used in the front-end, or in the administrative panel, or in both. Unlike the prefix of the label, this field must be set properly, as it drives the caching mechanism.

There are two ways to edit multiple labels at once. The first way is to edit one label, and then to use the blue Previous and Next buttons to go back and forth between the labels. The same order as in the list will be used in this case. The second way is to select multiple labels at once, and click the edit button.

As with any other second-level list, it is very important to remember, that your changes are not actually saved, until the regional package is saved. If you make changes to the labels, and then move to a different section without hitting Save on the regional package level, your changes will be lost.

5.2.5.3.4.3. Email Events

This tab contains the texts for email notifications sent out by the system when specific events occur. It contains all notification texts for the In-portal platform and the installed modules.

An email notification has the following fields:

- Subject – this field contains the subject of the email notification.

- Send Email As – This flag designates the email to be either in Plain Text or in the HTML format. Some older email clients cannot display the HTML emails, although they can be formatted a lot better.

- Extra Mail Headers – this field contains additional email headers that you may want to add to the outgoing email notification. The mail headers need to be entered in exact accordance with the email regulations.

- Message – this field contains the body of the message. It is possible, and in many cases recommended, to use In-tags inside the email subject and body. The In-tags will allow you to create customized emails. For example, to create an email notification that will address the user by their first and last names, you would use the following In-tags: "Dear `<inp:touser _Field="FirstName" />` `<inp:touser _Field="LastName" />`".

The other columns in the list display the information about the event itself, which cannot be changed from the Regional settings section. To change the event properties, please go to the appropriate Events section, for example, Structure & Data -> Email Setting for In-portal platform category events.

5.2.6. Tools
5.2.6.1. Backup

This section allows the administrator to perform a full database backup of the In-portal system.

5.2.6.1.1. Step 1

In Step 1, the administrator is asked to choose the path where the backup file will be stored. By default, it is the `'in-portal/admin/backupdata'` directory, but it can be any other location on the server, to which the web server has write-access. If you change the backup destination path, please be aware that the Restore function, described below, and the

Install function both look in the predefined directory for the backup files, therefore none of the other backups will be listed. Click the update button, if you have modified the path.

5.2.6.1.2. Step 2

This page displays the backup progress. Depending on the size of the data, and the performance of the server, the backup can take a widely variable amount of time. The top progress bar shows which table is being currently backed up, and how many rows have been completed. The bottom progress bar shows the progress on the database level – how many tables have been back up out of the total number of tables.

If you cancel the backup while it is in progress, you will not have a complete and reliable backup, therefore it is not recommended to do that.

5.2.6.1.3. Step 3

Step 3 will be shown after the backup has been completed. Here you will see a full path and file name of the backup file created, as well as its size. This is important information if you wish to download the backup file to another computer, as recommended for additional reliability.

5.2.6.2. Restore

This section allows the administrator to restore the data from a previous backup. Please note, that only backup files created by In-portal can be used by this restore function. Moreover, it is highly recommended to restore only those backups, which were created by In-portal platform of the same version as you are running the restore on. If the versions are mismatched, you will still be able to perform a restore, but it is very likely that your system will not be operational, or will have unpredictable errors.

The restore function is the same as the installation with 'Cleanout the database and install from backup' option.

5.2.6.2.1. Step 1

On the first page of the Restore section, you will be asked to enter the root password of the system, and to confirm the disclaimer. The disclaimer indicates that the restore procedure will completely erase your existing data, and replace it with what is in the backup file. In the event the restore fails for some reason, you may be left without functioning In-portal data.

Once you click next, you will be taken to the installation screen. It is not possible to be in the administrative console at the same time the restore is taking place, as all of the existing data, including the sessions and the user information, is erased.

5.2.6.2.2. Step 2

In this step, you will be asked to choose the directory, where your backup files are located. By default, it is the `'in-portal/admin/backupdata'` directory. It is the same as the default directory of the backup procedure. If you have a different location of the backup files, please enter it here and click the update button.

Below you will see a list of all available backup sets, and their time stamps.

This step is your last chance to abort the restore process. Please keep in mind, that during the restore process, which may take anywhere from a few minutes to several hours, depending on the size of the data and the speed of your server, both the administrative console and the front-end of your web site will not be usable. Once you click continue, all of your existing data will be deleted, and canceling the restore before it is finished will not return you to the previous state.

You will see a progress bar indicator while the restore process is in progress. Once it is complete, you will see a message, and will be directed to log back into the administrative console.

5.2.6.3. Export Data

There are no export wizards available in the current version. To export the data, please use your favorite SQL administration utility. One of the most popular utilities for MySQL can be downloaded from http://www.phpmyadmin.net.

5.2.6.4. Import Data

This section allows the administrator to import the data from other applications into your existing In-portal system.

Step 1 of the import begins with a disclaimer that the data in your current system will be affected. Please ensure you understand the import process and the particular kind of import you are doing before proceeding.

5.2.6.4.1. In-link 2 Import

In the current version, only the import from In-link2 is available. The import is designed for In-link version 2.3.4, however it will work, or partially work, for most of the older In-link2 versions up to 2.0.10. If you have one of the older In-link2 versions and are experiencing problems, please upgrade your In-link2 to the version 2.3.4, and then run this import.

It is not possible to use In-link2 import if you do not have In-link3 installed on your In-portal platform. Some In-link2 license holders are entitled to a complimentary In-link3 license, please go to your account at http://www.intechnic.com/myaccount for more information, or submit a support ticket.

5.2.6.4.1.1. Step 3

In this step, the administrator will be asked to enter all database information for the In-link2 data. The current version of In-portal only supports import from the MySQL databases of In-link2.

5.2.6.4.1.2. Step 4

In this step, the administrator will need to designate the options of the import – how the In-link2 data is supposed to be integrated into In-portal and In-link3.

- Administrative Group – this field designates the In-portal administrative group (by default, 'Admin'), into which the old In-link2 administrators should be imported. You can choose a different group for the import, and then designate

the administrative users later. Clicking on the group button will pop up a list of In-portal groups.

- Regular User Group - this field designates the In-portal group (by default, 'Members'), into which the old In-link2 users (link owners) should be imported. It is recommended to import then into a group that will give them access to the front-end, and to modify their links. However, you can choose a different group for the import, and then manage the users later. Clicking on the group button will pop up a list of In-portal groups.

- Initial Import Category – this field designates the In-portal category, which will serve as a root for the In-link2 import. This category will be the equivalent of the Home category in In-link2, and all of the sub-categories will be created underneath. Clicking on the category button (folder icon) will pop up a catalog navigator, where you can select the category.

- Link Image Name – this field designates the link image field in the In-link2 database, which was used to store the link image name. By default, it is `link_image`, however many users have used a custom field for this purpose, in which case you should enter the custom field name here.

5.2.6.5. *Query Database*

This section is for advanced administrators who are familiar with the SQL database language. The 'SQL Query' field on this page takes a full (and properly written) SQL query to be performed against your In-portal database. Clicking 'Save' will run the query and display the results on the next page, where you will get a chance to edit the query and run it again.

Please use extreme caution when using this function, because it does not provide any safeguards for the data, otherwise available in the rest of the administrative console. You can easily erase, or corrupt your In-portal data with a wrong query. It is also possible to cause the MySQL server to "freeze", or stop responding, in extreme cases. We recommend making a full database backup (see section 5.2.6.5) before running any UPDATE, DELETE, INSERT, ALTER or DROP queries.

5.2.7. Help
This section displays the current document in the HTML format.

5.3. In-link
This section of the manual applies only when you have installed In-link on your In-portal system. To learn how to add modules to your In-portal platform, please refer to the section 5.2.3 of this manual.

5.3.1. Managing Links
This section describes how to create and edit links, the main In-link items, in the Catalog section of the administrative console.

5.3.1.1. *General*

This tab contains the main attributes of the link.

- Enable HTML? - this check box enables or disables HTML code in the link name and description. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- Link Id – this read-only field displays the unique internal system ID of the link.

- Name* - this field contains the link name.

- Description – this field contains the link description. The shortcut to the HTML editor next to this field will open a pop-up with an online HTML editor

- URL* - this field contains the link URL. The URL can contain the protocol prefix (http://), but it does not have to.

- Link Owner* - this field contains the name of the user who is owns this link. A link owner, given proper permissions, may modify the link on the front-end. By default, the link owner is the link creator. The administrator may change the link owner, by entering a different user name in this field, or by selecting it through a user pop up (shortcut to a user icon).

- Status – this field contains the link status.

- New – this field controls how the link 'new' status is calculated by In-link.

- Hot – this field controls how the link 'hot' status is calculated by In-link.

- Popularity – this field controls how the link 'pop' status is calculated by In-link.

- Editor's Pick – this flags sets the Editor's Pick attribute of the link.

- Priority - this field contains the numeric link priority.

- Created on* - this field contains the creation date of the link. It is automatically set by the system when the link is created, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Expiration Date - this field contains the expiration date of the link. It is automatically set by the system when a link is created, using the creation date plus the predefined number of days, set in the In-link configuration. It can be changed by the administrator, by being entered directly into the field, or by using the visual calendar tool.

- Rating – this field contains the numeric rating of the link. The rating is calculated as the average value of all ratings selected by users for this link. The range of the value is predefined, and displayed to the right as a hint. The administrator can manually change the rating if necessary.

- Votes – this field contains the number of votes for the link. Each time a user votes (selects rating) for the link on the front-end, this value is incremented by

one. This value is important for the rating calculating, it is used in the formula to calculate the average. The administrator can manually change the number of votes if necessary.

- Hits – this field contains the number of link's hits. This value is incremented each time a user clicks on the link to go to the link's URL. The administrator can manually change the hits if necessary.

5.3.1.2.   Categories

This tab manages the categories of the link. The list shows all categories to which this link belongs. The administrator can add and remove additional categories on this list. At least one category must be there, and exactly one category must be designated as the primary. The primary category determines the permissions for the link. To designate the primary category of the link, select the category and click on the Primary Category icon in the toolbar. The 'primary' marker will move from the previous Primary Category to the one you have selected.

The link will appear in all of the categories it belongs to, in the Administrative Console as well as on the front-end.

5.3.1.3.   Relations

This tab contains a list of all relations of this link. To create a new relation, click the 'New' button (two opposite green arrows with a little sun). This will pop up an item picker, where you can choose one category or item of any module that supports relations.

- Relation ID – this is a read-only field, the internal system ID of the relation, guaranteed to be unique throughout the system. It is blank when a new relation is created.

- Item – this is a read-only field, displaying the name of the item that you are creating a relation to, and its type. In the current version, links can be related to categories, articles (if In-newz is installed) and topics (if In-bulletin is installed).

- Type – this field designated the type of the relation. A 'reciprocal' type denotes a two-way relation, and 'one way' – a one directional relation, from the link to the item.

- Enabled – this field is the status flag of the relation.

- Priority – this field is the numerical priority of the relation.

5.3.1.4.   Images

This tab contains all images associated with the link. To create a new image, click on the 'New' button (the icon like the Windows GIF icon with a little sun). This will open a new page where you specify the image details.

- Image ID – a read-only field, the internal system ID of the image, guaranteed to be unique throughout the system. It is blank when a new image is created.

- Name – this field contains the image name, used on the front-end, inside the In-tags to refer to this image.

- Alt Value – this field contains the text value, which will be displayed in the 'alt' tag of the image on the front end, inside the page HTML code, and when a mouse pointer hovers over the image (in Internet Explorer).

- Status – this field contains the status of the image, enabled or disabled.

- Primary – this flag designates the primary image. There can be only one primary image per list (for one link). When you check this box on an image, the previous primary image is unset (if there is more than one image in the list).

- Priority – this field contains the numerical priority of the image.

- Thumbnail location (upload from PC) – Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the `'in-portal/kernel/images'` directory.

- Thumbnail location (remote URL) – Here you can enter a remote URL address of an image. It will be linked from the remote server.

- Same As Thumbnail – This check box sets the full-size image to be the same as the thumbnail image. When this option is checked, you cannot upload a full-size image.

- Thumbnail location (upload from PC) - Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the 'in-portal/kernel/images' directory.

- Thumbnail location (remote URL) - Here you can enter a remote URL address of an image. It will be linked to from the remote server.

5.3.1.5. Reviews

This tab lists all reviews of the link, and allows the administrator to manage them. Reviews are little text articles that are attached to the link. They can be used to collect feedback from the front-end users, to provide details of the ratings, and for many other purposes.

Reviews have their own status, independent from the link. They can be active, pending or disabled. The idea is very similar to the link status – only active reviews are displayed on the link detail page, or wherever specified in the theme design. The category permissions specify the status of a new review created on the front-end.

- Enable HTML? – this check box enables or disables HTML code in the review body. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- Review ID - this field is a read-only unique system ID of the review.

- Created by* - this field contains the name of the user who submitted the review. This information will be displayed, along with the text of the review and the

date, on the front-end, unless specified otherwise in the active theme. The administrator may change the review author by entering a different user name in this field, or by selecting it through a user picker (shortcut to a user icon will pop up the picker in a new window).

- Review Text* - this field contains the main body of the review. To use the online HTML editor, click on the 'Editor' button next to this field.

- Status - this is the status field of the review.

- Priority – this field contains the numerical priority of the review.

- Created on – this field contains the creation date of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Created at - this field contains the creation time of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

5.3.1.6.   Custom

This tab displays all custom fields configured in In-link, and allows the administrator to edit their information for this link.

5.3.2. Permissions

The link permissions are controlled at the category level, like any other item permissions. To manage the permissions of a link, edit the primary category of that link and open the Permissions tab. For more information on how to use the Permissions tab, please refer to the section 5.2.1.1.1.4 of this manual. The list of In-link permissions is as follows:

- Add Link – this permission will allow the users of the group to add links directly into the category. The links will be automatically created as active, please compare this to the Pending link permission. In the event both permissions are on, the Add Link permission will take precedence.

- View Link – this permission will allow the users of the group to view the links in this category.

- Pending Link – this permission will allow the users of the group to add links to the category with the pending status. Such links will not be visible on the front-end until approved (activated) by the administrator. Please compare this to the Add Link permission. In the event both permissions are on, the Add Link permission will take precedence.

- Modify Link - this permission will allow the users of the group to modify all links in the category. The modifications will take effect immediately after they are saved by the user on the front-end. Please compare it to the other modify permissions: Modify Link Pending, Link Modify by Owner and Link Modify

Pending by Owner. In the event both this and Modify Link Pending permissions are on, the Modify Link permission will take precedence.

- Delete Link - this permission will allow the users of the group to delete links in this category. Please compare it to the Link Delete by Owner permission.

- Rate Link - this permission will allow the users of the group to rate links in this category.

- Review Link - this permission will allow the users of the group to submit reviews to links in this category. The reviews will be submitted as active and visible on the front-end. Please compare it to the Review Link Pending permission. In the event both permissions are on, the Review Link permission will take precedence.

- Review Link Pending - this permission will allow the users of the group to submit pending reviews to links in this category. The reviews will be created with the pending status and will not be visible on the front-end. Please compare it to the Review Link permission. In the event both permissions are on, the Review Link permission will take precedence.

- Modify Link Pending - this permission will allow the users of the group to modify all links in the category. The modifications will be temporarily stored as new link with a pending status. The administrator will have a chance to review the modifications, and then either approve or delete them. In the event the modifications are approved, the original link will be replaced with the modified one. Otherwise, the modifications will be discarded and the original link will remain unchanged. While the modifications are pending and awaiting the administrator's approval, the original link will be displayed on the front-end. Please compare it to the other modify permissions: Modify Link, Link Modify by Owner and Link Modify Pending by Owner. In the event both this and Modify Link Pending permissions are on, the Modify Link permission will take precedence.

- Link Modify by Owner - this permission is the same as the Modify Link permission, however it will allow the users of the group to only change their own links in this category – those links, which list them as the owners. Please compare it to the other modify permissions: Modify Link, Modify Link Pending and Link Modify Pending by Owner. In the event both this and Link Modify Pending by Owner permissions are on, the Link Modify by Owner permission will take precedence.

- Link Modify Pending by Owner - this permission is the same as the Modify Link Pending permission, however it will allow the users of the group to only change their own links in this category – those links, which list them as the owners. Please compare it to the other modify permissions: Modify Link, Modify Link Pending and Link Modify by Owner. In the event both this and Link Modify by Owner permissions are on, the Link Modify by Owner permission will take precedence.

- Link Delete by Owner - this permission is the same as the Delete Link permission, however it will allow the users of the group to only delete their own links in this category – those links, which list them as the owners. Please compare it to the Delete Link permission.

5.3.3. General Settings

This section contains general In-link settings, which are not related to links. In the current version, it has only one setting. 'Select Module Root Category' allows the administrator to specify the module root category of In-link. Clicking on the folder shortcut button will pop up a category picker.

The module root category is used in several ways. On the front-end, in the Default theme, the top menu links each module to its module root category. Therefore, the 'Directory' menu item will open this category and its contents. In the Administrative Console, this setting provides a faster way to navigate in the module, as it presets the category for module-specific actions.

Logically, the module root category defines the portion of the catalog tree that is designated only for the In-link categories. If you are using the categories to store items from multiple modules, this setting is not applicable to your situation.

5.3.4. Output Settings

This section allows the administrator to specify the default values for various link settings in In-link.

- Order links by – this setting specifies the default primary sort order for the link listings. It applies both on the front-end, and in the Administrative Console – in the catalog. The first dropdown allows to select the field (an attribute of the link), and the second dropdown – the direction of the sort.

- And then by – this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are ambiguous. For example, when the primary sort value is 'Link Name', the secondary order will be used to sort among links with the same name.

- Number of links per page – specifies the default number of links shown per page. This value applies both to the front-end and to the Administrative Console. In the latter, this value can be changed for each session through the View menu.

- Number of links per page on a short listing – this setting is similar to the 'Number of links per page', but it applies to the front-end short link lists only. It can be overridden by setting the tag attributes in the appropriate templates.

- Number of days for a link to be NEW – this setting specifies the number of days, from the date of creation, during which the link will be automatically marked 'New' by the system. This setting will only apply to the links with the 'New' flag set to 'Automatic'.

- Minimum rating for a link to be POP– this setting specifies the minimum rating of the link for it to be automatically marked 'Popular' by the system. This setting will only apply to the links with the 'Popularity' flag set to 'Automatic'.

- Number of hits for a link to be HOT– this setting specifies the minimum number of hits of the link for it to be automatically marked 'Hot' by the system. This setting will only apply to the links with the 'Hot' flag set to 'Automatic'.

- Minimum number of votes to enable link rating – this setting specifies the minimum number of votes required for the link rating to be effective. Usually, when only a small number of users have voted on a link, its rating will not be statistically accurate - it is likely, that only biased users have voted. When a larger number of users vote, the rating becomes more accurate. The rating of links with fewer votes then specified in this setting will be undefined.

- Display editor PICKs above regular links – this setting will force all links, marked as 'Editor's pick' to be displayed above the other links, regardless of their priority or sort order. Among themselves, 'Editor's pick' links will be sorted according to the regular rules.

- Display link URL in status bar – this setting toggles the display of the URL in the browsers status bar (usually at the bottom of the window). It is impossible to view the URL of the link by examining the link itself, because In-link uses an intermediate script to redirect visitors to the link destinations. If it is desirable that the visitors can see the destination of the link, enable this setting.

- Allow Duplicate Reviews – this setting specifies the period during which the same user cannot submit another review on the same link. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero, the users can submit reviews without this limitation. Please note, that regardless of this setting, the same user will be able to submit a review on another link immediately after the first review.

- Allow Duplicate Rating Votes - this setting specifies the period during which the same user cannot rate the same link again. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero, the users can rate links without this limitation. Please note, that regardless of this setting, the same user will be able to rate another link immediately after the first rating.

- Reviews Per Page - specifies the default number of reviews shown per page. This value applies both to the front-end and to the Administrative Console.

- Sort reviews by - this setting specifies the default primary sort order for the review listings. It applies both on the front-end, and in the Administrative Console – in the link management section, Reviews tab. The first dropdown allows to select the field (an attribute of the review), and the second dropdown – the direction of the sort.

- and then by - this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are

ambiguous. For example, when the primary sort value is 'Review Text', the secondary order will be used to sort among reviews with the same body.

5.3.5. Search Settings

This section allows the administrator to configure the front-end search options, and the advanced search options.

This section lists all fields representing links attributes. Next to each field, there is a 'Simple Search' checkbox, which includes this field in the simple search query. By default, only the 'Name', the 'Description' and the 'URL' fields are included. In general, it makes sense to include only the fields, which may contain text in them, otherwise when a visitor searches for a text keyword, the non-textual fields will be not searchable. Next, there is a 'Weight' text box, in which the administrator can designate the importance of each field during a search. The fields with a larger weight will be more important then the fields with the lower weight. This is used when calculating the link's relevance to the search keyword, for sorting of the results. The last column is the 'Advanced Search' check. It designates whether a particular field should be displayed on the 'Advanced Search' page and be searchable by the visitors. By default, all fields are included.

Below the list of fields are the Link Relevance settings.

- Increase importance if field contains a required keyword by – this specifies the percentage by which the weight of a field will increase, when a required keyword is found in that field. A required keyword is one that is preceded with a '+' in the search key phrase.

- Search Relevance depends on _ % keyword – the percentage of relevance that comes from the keyword being found in that link.

- Search Relevance depends on _ % popularity - the percentage of relevance that is based on the link's popularity.

- Search Relevance depends on _ % rating - the percentage of relevance that is based on the link's rating.

5.3.6. E-mail Settings

This section lists all possible In-link events. Each event has a description, a type – 'User' or 'Admin', a status – 'Enabled', 'Front-end Only', and a 'From/To User'. The description hints about when the event occurs. The type indicates whether the email notification will be sent to the front-end user, or the administrator. The status 'Enabled' signifies that the email notifications for this event are enabled for both the front-end and the Administrative Console. The Front-end Only' status means that the notifications will be sent only when the event occurs on the front end. The 'Disabled' status means no notifications will be sent when this event occurs. The 'From/To User' field specifies the 'From' email for front-end user notifications, and the 'To' email for the administrative notifications. The other, matching pair of addresses ('To' for the front, and 'From' for the admin) is automatically determined by the system based on who initiated the event. The event notification status can be changed by clicking on the toolbar buttons – 'Enable' to enable the notification, 'Disable' to disable it, and 'Front Only' (icon with a monitor) to set to 'Front-end Only' status.

5.3.7. Custom Fields

This section allows the administrator to manage the link custom fields. The link custom fields are useful when you need to store additional information about the links. For example, the links may have such custom fields, as the language of the destination site, the safe audience rating, the load times, etc. All custom fields will be automatically used in the Administrative Console, in the Link Management section. You will need to edit the theme templates for them to appear on the front-end.

- Field Id – this is a read-only field displaying the unique system ID of the custom field.

- Field Name – sets the internal name of the custom field. This is the name you would use to refer to the custom field in the In-tags when designing templates.

- Field Label – this is a read-only field, which displays the language variable name associated with the label of that field, and the value of the variable in the current language (after the colon). The label is used on the front end, and in the Administrative Console, to describe the field to the user who is entering information into it.

- Show on the general tab – this setting controls whether the custom field will be also displayed on the General tab in the Administrative Console, when editing the links. It is a short cut for frequently used custom fields. All settings below apply only when this is checked.

- Heading – this field contains the language variable of the section heading, under which the field appear on the general tab.

- Field Prompt – this field contains the language variable, which text will appear as the hint bind the field.

- Input Type – this drop down allows the administrator to designate the type of the information stored in the custom field, by specifying the HTML control to be used on the General form.

- List of Values – this field contains all choices for the above HTML controls of type 'radio button' or 'drop down'. The choices must be in the format: "value1 = language variabe1, value2=language variable2". For example, to create a drop down with three choices (One, Two, Three) and their respective numerical values, this field would contain the following: "1=la_one,2=la_two,3=la_three).

5.3.8. Link Validation

This section allows the administrator to validate links in the directory. The section lists all links in the database, displays their current validation status, and shows the URL of each link for manual verification. Please see section 4.3.1 for more information about the link validation process.

5.3.8.1.   Continue Validation

Since link validation is a batch job that takes a long time even on moderate size databases, it is common for administrators to run it in several sessions. The 'Continue

Validation' function allows the administrator to continue the process where it was left off. It also detects new links added to the database since the last session, and adds them to the validation batch.

5.3.8.2. New Validation

This function restarts the entire validation process and resets the validation status on all links. You should use it periodically, for example once a quarter, to ensure that all links in your database remain valid, or when there are major changes in your database.

5.3.8.3. Validate

This function validates a specific link or a selection of links. It is designed for one-time uses, for example, when you want to verify the newly added links without having to wait for the batch process.

5.3.8.4. Reset Validation Status

This function resets validation status on a link or a selection of links. The batch verification will automatically schedule them to be validated again.

5.3.8.5. Delete

This function deletes a link or a selection of links. This is a shortcut for cleaning the database from the invalid, or dead, links. It is the same as the 'Delete' function in the main Catalog.

5.4. In-newz

This section of the manual applies only when you have installed In-newz on your In-portal system. To learn how to add modules to your In-portal platform, please refer to the section 5.2.3 of this manual.

5.4.1. Managing Articles

This section describes how to create and edit articles, the main In-newz items, in the Catalog section of the Administrative Console.

5.4.1.1. General

This tab contains the main attributes of the article.

- Enable HTML? - this check box enables or disables HTML code in the article title, body and excerpt. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- News Article Id – this read-only field displays the unique internal system ID of the article.

- Title* - this field contains the article name.

- Author* - this field contains the name of the user who is the designated author of the article. It can be an In-portal user, or somebody else – this field accepts

plain text as well as user names. By default, the article author is the user who creates the article. The administrator may change the article author, by entering a different user name, by selecting it through a user pop up (shortcut to a user icon), or by entering any other text in this field.

- Article Body* – this field contains the main body of the article. The shortcut to the HTML editor next to this field will open a pop-up with an online HTML editor

- Article Excerpt - this field contains the summary of the article body. It should be significantly shorter then the main text. The option to 'Generate from the article body' will automatically take a portion of the main text and insert it into the excerpt when you save the article.

- Status – this field contains the article status.

- New – this field controls how the article 'new' status is calculated by In-newz.

- Hot – this field controls how the article 'hot' status is calculated by In-newz.

- Popularity – this field controls how the article 'pop' status is calculated by In-newz.

- Editor's Pick – this flags sets the Editor's Pick attribute of the article.

- Site Lead Story – this flags sets the Site Lead attribute of the article. The default theme is designed for one Site Lead articles, but you may change that depending on your implementation needs.

- Category Lead Story – this flags sets the Category Lead attribute of the article. The default theme is designed for three lead articles in each category, but you may change that depending on your implementation needs.

- Priority - this field contains the numeric article priority.

- Created on* - this field contains the creation date of the article. It is automatically set by the system when the article is created, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Start Date - this field contains the date starting on which the article should be displayed on the front-end. It is automatically set by the system to be the same as the creation date, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Archivation Date - this field contains the date when the article will be archived. Archived articles are not displayed on the front-end. This date is automatically set by the system when the article is created, using the creation date plus the predefined number of days, set in the In-newz configuration. It can be changed by the administrator, by being entered directly into the field, or by using the visual calendar tool.

- Rating – this field contains the numeric rating of the article. The rating is calculated as the average value of all ratings selected by users for this article. The range of the value is predefined, and displayed to the right as a hint. The administrator can manually change the rating if necessary.

- Votes – this field contains the number of votes for the article. Each time a user votes (selects rating) for the article on the front-end, this value is incremented by one. This value is important for the rating calculating, it is used in the formula to calculate the average. The administrator can manually change the number of votes if necessary.

- Hits – this field contains the number of article's hits. This value is incremented each time a user views the article. The administrator can manually change the hits if necessary.

5.4.1.2. Categories

This tab manages the categories of the article. The list shows all categories to which this article belongs. The administrator can add and remove additional categories on this list. At least one category must be listed, and exactly one category must be designated as the primary. The primary category determines the permissions for the article. To designate the primary category of the article, select the category and click on the Primary Category icon in the toolbar. The 'primary' marker will move from the previous Primary Category to the one you have selected.

The article will appear in all of the categories it belongs to, in the Administrative Console as well as on the front-end. All of the article's attributes (such as the Category Lead Story) will be applied in all categories as well.

5.4.1.3. Relations

This tab contains a list of all relations of this article. To create a new relation, click the 'New' button (two opposite green arrows with a little sun). This will pop up an item picker, where you can choose one category or item of any module that supports relations.

- Relation ID – this is a read-only field, the internal system ID of the relation, guaranteed to be unique throughout the system. It is blank when a new relation is created.

- Item – this is a read-only field, displaying the name of the item that you are creating a relation to, and its type. In the current version, articles can be related to categories, links (if In-link is installed) and topics (if In-bulletin is installed).

- Type – this field designated the type of the relation. A 'reciprocal' type denotes a two-way relation, and 'one way' – a one directional relation, from the article to the item.

- Enabled – this field is the status flag of the relation.

- Priority – this field is the numerical priority of the relation.

5.4.1.4. Images

This tab contains all images associated with the article. To create a new image, click on the 'New' button (the icon like the Windows GIF icon with a little sun). This will open a new page where you specify the image details.

- Image ID – a read-only field, the internal system ID of the image, guaranteed to be unique throughout the system. It is blank when a new image is created.

- Name – this field contains the image name, used on the front-end, inside the In-tags to refer to this image.

- Alt Value – this field contains the text value, which will be displayed in the 'alt' tag of the image on the front end, inside the page HTML code, and when a mouse pointer hovers over the image (in Internet Explorer).

- Status – this field contains the status of the image, enabled or disabled.

- Primary – this flag designates the primary image. There can be only one primary image per list (for one article). When you check this box on an image, the previous primary image is unset (if there is more than one image in the list).

- Priority – this field contains the numerical priority of the image.

- Thumbnail location (upload from PC) – Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the `in-portal/kernel/images` directory.

- Thumbnail location (remote URL) – Here you can enter a remote URL address of an image. It will be linked from the remote server.

- Same As Thumbnail – This check box sets the full-size image to be the same as the thumbnail image. When this option is checked, you cannot upload a full-size image.

- Thumbnail location (upload from PC) - Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the 'in-portal/kernel/images' directory.

- Thumbnail location (remote URL) - Here you can enter a remote URL address of an image. It will be linked to from the remote server.

5.4.1.5. Reviews

This tab lists all reviews of the article, and allows the administrator to manage them. Reviews are user responses to the article. They can be used to collect feedback from the front-end users, to provide details of the ratings, and for many other purposes.

Reviews have their own status, independent from the article. They can be active, pending or disabled. The idea is very similar to the article status – only active reviews are displayed on the article detail page, or wherever specified in the theme design. The category permissions specify the status of a new review created on the front-end.

- Enable HTML? – this check box enables or disables HTML code in the review body. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- Review ID -this field is a read-only unique system ID of the review.

- Created by* - this field contains the name of the user who submitted the review. This information will be displayed, along with the text of the review and the date, on the front-end, unless specified otherwise in the active theme. The administrator may change the review author by entering a different user name in this field, or by selecting it through a user picker (shortcut to a user icon will pop up the picker in a new window).

- Review Text* - this field contains the main body of the review. To use the online HTML editor, click on the 'Editor' button next to this field.

- Status - this is the status field of the review.

- Priority – this field contains the numerical priority of the review.

- Created on – this field contains the creation date of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Created at - this field contains the creation time of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

5.4.1.6.   Custom

This tab displays all custom fields configured in In-newz, and allows the administrator to edit their information for this article.

5.4.2. Permissions

The article permissions are controlled at the category level, like any other item permissions. To manage the permissions of an article, edit the primary category of that article and open the Permissions tab. For more information on how to use the Permissions tab, please refer to the section 5.2.1.1.1.4 of this manual. The list of In-newz permissions is as follows:

- View News – this permission will allow the users of the group to view the articles in this category.

- Add News – this permission will allow the users of the group to add articles into the category. This permission applies only to the Administration Console, since in the current version it is not possible to add the articles on the front-end.

- Delete News - this permission will allow the users of the group to delete articles in this category. This permission applies only to the Administration Console, since in the current version it is not possible to add the articles on the front-end.

- Modify News - this permission will allow the users of the group to modify all articles in the category. This permission applies only to the Administration Console, since in the current version it is not possible to add the articles on the front-end.

- Rate News - this permission will allow the users of the group to rate the articles in this category.

- Review News - this permission will allow the users of the group to submit reviews to the articles in this category. The reviews will be submitted as active and visible on the front-end. Please compare it to the Review News Pending permission. In the event both permissions are on, the Review News permission will take precedence.

- Review News Pending - this permission will allow the users of the group to submit pending reviews to the articles in this category. The reviews will be created with the pending status and will not be visible on the front-end. Please compare it to the Review News permission. In the event both permissions are on, the Review News permission will take precedence.

5.4.3. General Settings

This section contains general In-newz settings, which are not related to articles. In the current version, it has only one setting. 'Select Module Root Category' allows the administrator to specify the module root category of In-newz. Clicking on the folder shortcut button will pop up a category picker.

The module root category is used in several ways. On the front-end, in the Default theme, the top menu links each module to its module root category. Therefore, the 'News' menu item will open this category and its contents. In the Administrative Console, this setting provides a faster way to navigate in the module, as it presets the category for module-specific actions.

Logically, the module root category defines the portion of the catalog tree that is designated only for the In-newz categories. If you are using the categories to store items from multiple modules, this setting is not applicable to your situation.

5.4.4. Output Settings

This section allows the administrator to specify the default values for various article settings in In-newz.

- Order articles by – this setting specifies the default primary sort order for the article listings. It applies both on the front-end, and in the Administrative

Console – in the catalog. The first dropdown allows to select the field (an attribute of the article), and the second dropdown – the direction of the sort.

- And then by – this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are ambiguous. For example, when the primary sort value is 'Article Title', the secondary order will be used to sort among articles with the same title.

- Number of articles per page – specifies the default number of articles shown per page. This value applies both to the front-end and to the Administrative Console. In the latter, this value can be changed for each session through the View menu.

- Articles Per Page (Shortlist) – this setting is similar to the 'Number of articles per page', but it applies to the front-end short article lists only. It can be overridden by setting the tag attributes in the appropriate templates.

- Number of days for an article to be NEW – this setting specifies the number of days, from the date of creation, during which the article will be automatically marked 'New' by the system. This setting will only apply to the articles with the 'New' flag set to 'Automatic'.

- Minimum rating for an article to be POP– this setting specifies the minimum rating of the article for it to be automatically marked 'Popular' by the system. This setting will only apply to the articles with the 'Popularity' flag set to 'Automatic'.

- Number of clicks for an article to be HOT– this setting specifies the minimum number of views of the article for it to be automatically marked 'Hot' by the system. This setting will only apply to the links with the 'Hot' flag set to 'Automatic'.

- Minimum # of votes for rating consideration – this setting specifies the minimum number of votes required for the article rating to be effective. Usually, when only a small number of users have voted on an article, its rating will not be statistically accurate - it is likely, that only biased users have voted. When a larger number of users vote, the rating becomes more accurate. The rating of articles with fewer votes then specified in this setting will be undefined.

- Display editor PICKs above regular articles – this setting will force all articles, marked as 'Editor's pick' to be displayed above the other articles, regardless of their priority or sort order. Among themselves, 'Editor's pick' articles will be sorted according to the regular rules.

- Number of days to archive articles automatically – this setting contains the number of days to be added to the article creation date to set the archivation date.

- Allow Duplicate Reviews – this setting specifies the period during which the same user cannot submit another review on the same article. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero,

the users can submit reviews without this limitation. Please note, that regardless of this setting, the same user will be able to submit a review on another article immediately after the first review.

- Allow Duplicate Rating Votes - this setting specifies the period during which the same user cannot rate the same article again. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero, the users can rate articles without this limitation. Please note, that regardless of this setting, the same user will be able to rate another article immediately after the first rating.

- Reviews Per Page - specifies the default number of reviews shown per page. This value applies both to the front-end and to the Administrative Console.

- Sort reviews by - this setting specifies the default primary sort order for the review listings. It applies both on the front-end, and in the Administrative Console – in the article management section, Reviews tab. The first dropdown allows to select the field (an attribute of the review), and the second dropdown – the direction of the sort.

- and then by - this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are ambiguous. For example, when the primary sort value is 'Review Text', the secondary order will be used to sort among reviews with the same body.

5.4.5. Search Settings

This section allows the administrator to configure the front-end search options, and the advanced search options.

This section lists all fields representing article attributes. Next to each field, there is a 'Simple Search' checkbox, which includes this field in the simple search query. By default, only the 'Title, the 'Excerpt', the 'Author' and the 'Body' fields are included. In general, it makes sense to include only the fields, which may contain text in them, otherwise when a visitor searches for a text keyword, the non-textual fields will be not searchable. Next, there is a 'Weight' text box, in which the administrator can designate the importance of each field during a search. The fields with a larger weight will be more important then the fields with the lower weight. This is used when calculating the article's relevance to the search keyword, for sorting of the results. The last column is the 'Advanced Search' check. It designates whether a particular field should be displayed on the 'Advanced Search' page and be searchable by the visitors. By default, all fields are included.

Below the list of fields are the Article Relevance settings.

- Increase importance if field contains a required keyword by – this specifies the percentage by which the weight of a field will increase, when a required keyword is found in that field. A required keyword is one that is preceded with a '+' in the search key phrase.

- Search Relevance depends on _ % keyword – the percentage of relevance that comes from the keyword being found in that article.

- Search Relevance depends on _ % popularity - the percentage of relevance that is based on the article's popularity.

- Search Relevance depends on _ % rating - the percentage of relevance that is based on the article's rating.

5.4.6. E-mail Settings

This section lists all possible In-newz events. Each event has a description, a type – 'User' or 'Admin', a status – 'Enabled', 'Front-end Only', and a 'From/To User'. The description hints about when the event occurs. The type indicates whether the email notification will be sent to the front-end user, or the administrator. The status 'Enabled' signifies that the email notifications for this event are enabled for both the front-end and the Administrative Console. The Front-end Only' status means that the notifications will be sent only when the event occurs on the front end. The 'Disabled' status means no notifications will be sent when this event occurs. The 'From/To User' field specifies the 'From' email for front-end user notifications, and the 'To' email for the administrative notifications. The other, matching pair of addresses ('To' for the front, and 'From' for the admin) is automatically determined by the system based on who initiated the event. The event notification status can be changed by clicking on the toolbar buttons – 'Enable' to enable the notification, 'Disable' to disable it, and 'Front Only' (icon with a monitor) to set to 'Front-end Only' status.

5.4.7. Custom Fields

This section allows the administrator to manage the article custom fields. The article custom fields are useful when you need to store additional information about the articles. For example, the articles may have such custom fields, as the language of the article, the safe audience rating, the country where the even occurred, etc. All custom fields will be automatically used in the Administrative Console, in the Article Management section. You will need to edit the theme templates for them to appear on the front-end.

- Field Id – this is a read-only field displaying the unique system ID of the custom field.

- Field Name – sets the internal name of the custom field. This is the name you would use to refer to the custom field in the In-tags when designing templates.

- Field Label – this is a read-only field, which displays the language variable name associated with the label of that field, and the value of the variable in the current language (after the colon). The label is used on the front end, and in the Administrative Console, to describe the field to the user who is entering information into it.

- Show on the general tab – this setting controls whether the custom field will be also displayed on the General tab in the Administrative Console, when editing the articles. It is a short cut for frequently used custom fields. All settings below apply only when this is checked.

- Heading – this field contains the language variable of the section heading, under which the field appear on the general tab.

- Field Prompt – this field contains the language variable, which text will appear as the hint bind the field.

- Input Type – this drop down allows the administrator to designate the type of the information stored in the custom field, by specifying the HTML control to be used on the General form.

- List of Values – this field contains all choices for the above HTML controls of type 'radio button' or 'drop down'. The choices must be in the format: "value1 = language variabe1, value2=language variable2". For example, to create a drop down with three choices (One, Two, Three) and their respective numerical values, this field would contain the following: "1=la_one,2=la_two,3=la_three).

5.5. In-bulletin

This section of the manual applies only when you have installed In-bulletin on your In-portal system. To learn how to add modules to your In-portal platform, please refer to the section 5.2.3 of this manual.

5.5.1. Managing Topics

This section describes how to modify the topics, the main In-bulletin items, in the Catalog section of the Administrative Console. Please note that is it not possible to create a topic through the Administrative Console. The topics are created when the first post is created, and the posts are managed only through the front-end.

5.5.1.1. General

This tab contains the main attributes of the topic.

- Enable HTML? - this check box enables or disables HTML code in the topic name. It does not affect the posts in this topic. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- Topic ID – this read-only field displays the unique internal system ID of the topic.

- Name* - this field contains the topic name, or subject.

- Posted by* - this field contains the name of the user who started the topic by posting the first message in it. This information will be displayed on the first post of the topic on the front-end, unless specified otherwise in the active theme. The administrator may change the topic author, by entering a different user name or by selecting it through a user pop up (shortcut to a user icon).

- Topic Locked – this field toggles the topic lock attribute. When a topic is locked, it is not possible to make new posts in it.

- Status – this field contains the topic status.

- New – this field controls how the topic 'new' status is calculated by In-bulletin.

- Hot – this field controls how the topic 'hot' status is calculated by In-bulletin.

- Popularity – this field controls how the topic 'pop' status is calculated by In-bulletin.

- Editor's Pick – this flags sets the Editor's Pick attribute of the topic. This is very similar to the 'sticky' feature of other bulletin boards.

- Priority - this field contains the numeric topic priority.

- Created on* - this field contains the creation date of the topic. It is automatically set by the system when the topic is created, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Created at - this field contains the creation time of the topic. It is automatically set by the system when the first post is submitted, however it can be changed by the administrator.

- Modified on* - this field contains the modification date of the topic. It is automatically set by the system when the topic is changed, or any posts in it have changed, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Modified at - this field contains the modification time of the topic. It is automatically set by the system when the topic is changed, or any posts in it have changed, however it can be changed by the administrator.

- Rating – this field contains the numeric rating of the topic. The rating is calculated as the average value of all ratings selected by users for this topic. The range of the value is predefined, and displayed to the right as a hint. The administrator can manually change the rating if necessary.

- Votes – this field contains the number of votes for the topic. Each time a user votes (selects rating) for the topic on the front-end, this value is incremented by one. This value is important for the rating calculating, it is used in the formula to calculate the average. The administrator can manually change the number of votes if necessary.

- Views – this field contains the number of topic's views. This value is incremented each time a user views the topic. The administrator can manually change the number of views if necessary.

5.5.1.2. Categories

This tab manages the categories of the topic. The list shows all categories to which this topic belongs. The administrator can add and remove additional categories on this list. At least one category must be listed, and exactly one category must be designated as the primary. The primary category determines the permissions for the topic. To designate the primary category of the topic, select the category and click on the Primary Category icon in the

toolbar. The 'primary' marker will move from the previous Primary Category to the one you have selected.

The topic will appear in all of the categories it belongs to, in the Administrative Console as well as on the front-end.

5.5.1.3. Relations

This tab contains a list of all relations of this topic. To create a new relation, click the 'New' button (two opposite green arrows with a little sun). This will pop up an item picker, where you can choose one category or item of any module that supports relations.

- Relation ID – this is a read-only field, the internal system ID of the relation, guaranteed to be unique throughout the system. It is blank when a new relation is created.

- Item – this is a read-only field, displaying the name of the item that you are creating a relation to, and its type. In the current version, topics can be related to categories, links (if In-link is installed) and articles (if In-newz is installed).

- Type – this field designated the type of the relation. A 'reciprocal' type denotes a two-way relation, and 'one way' – a one directional relation, from the topic to the item.

- Enabled – this field is the status flag of the relation.

- Priority – this field is the numerical priority of the relation.

5.5.1.4. Images

This tab contains all images associated with the topic. To create a new image, click on the 'New' button (the icon like the Windows GIF icon with a little sun). This will open a new page where you specify the image details.

- Image ID – a read-only field, the internal system ID of the image, guaranteed to be unique throughout the system. It is blank when a new image is created.

- Name – this field contains the image name, used on the front-end, inside the In-tags to refer to this image.

- Alt Value – this field contains the text value, which will be displayed in the 'alt' tag of the image on the front end, inside the page HTML code, and when a mouse pointer hovers over the image (in Internet Explorer).

- Status – this field contains the status of the image, enabled or disabled.

- Primary – this flag designates the primary image. There can be only one primary image per list (for one topic). When you check this box on an image, the previous primary image is unset (if there is more than one image in the list).

- Priority – this field contains the numerical priority of the image.

- Thumbnail location (upload from PC) – Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the `in-portal/kernel/images` directory.

- Thumbnail location (remote URL) – Here you can enter a remote URL address of an image. It will be linked from the remote server.

- Same As Thumbnail – This check box sets the full-size image to be the same as the thumbnail image. When this option is checked, you cannot upload a full-size image.

- Thumbnail location (upload from PC) - Using this control, you can upload an image from the workstation you are at to the In-portal server. The image will be stored in the `'in-portal/kernel/images'` directory.

- Thumbnail location (remote URL) - Here you can enter a remote URL address of an image. It will be linked to from the remote server.

5.5.1.5.   Reviews

This tab lists all reviews of the topic, and allows the administrator to manage them. Reviews are user responses to the topic, they are similar to posts and in some instances they are redundant. However, they can be used to collect feedback from the front-end users, to provide details of the ratings, and for a few other purposes.

Reviews have their own status, independent from the topic. They can be active, pending or disabled. The idea is very similar to the topic status – only active reviews are displayed on the post listing page, or wherever specified in the theme design. The category permissions specify the status of a new review created on the front-end.

- Enable HTML? – this check box enables or disables HTML code in the review body. When checked, it will render the HTML (for example, a <B> tag will actually make the text bold). When unchecked, it will display the HTML as regular text (the <B> tag will appear exactly as '<B>'). This is a very important setting, since some HTML tags can break the page layout, and in some instances can be a security concern (the Java Script, for example).

- Review ID -this field is a read-only unique system ID of the review.

- Created by* - this field contains the name of the user who submitted the review. This information will be displayed, along with the text of the review and the date, on the front-end, unless specified otherwise in the active theme. The administrator may change the review author by entering a different user name in this field, or by selecting it through a user picker (shortcut to a user icon will pop up the picker in a new window).

- Review Text* - this field contains the main body of the review. To use the online HTML editor, click on the 'Editor' button next to this field.

- Status - this is the status field of the review.

- Priority – this field contains the numerical priority of the review.

- Created on – this field contains the creation date of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator. The date can be entered directly into the field, or by using the visual calendar tool.

- Created at - this field contains the creation time of the review. It is automatically set by the system when the review is submitted, however it can be changed by the administrator.

5.5.1.6. Custom

This tab displays all custom fields configured in In-bulletin, and allows the administrator to edit their information for this article.

5.5.2. Permissions

The topic permissions are controlled at the category level, like any other item permissions. To manage the permissions of a topic, edit the primary category of that topic and open the Permissions tab. For more information on how to use the Permissions tab, please refer to the section 5.2.1.1.1.4 of this manual. The list of In-bulletin permissions is as follows:

- View Topic – this permission will allow the users of the group to view the topics in this category.

- Add Topic – this permission will allow the users of the group to create new topics in this category. This permission applies only to the front-end, since it is not possible to add a topic in the Administration Console. The topics will be created as active and open for posting. Please compare it to the Add Pending Topic permission. In the event both permissions are on, the Add Topic permission will take precedence.

- Add Pending Topic – this permission will allow the users of the group to create new topics in this category. This permission applies only to the front-end, since it is not possible to add a topic in the Administration Console. The topics will be created as pending and will not be visible on the front-end, until the administrator approves them. Please compare it to the Add Topic permission. In the event both permissions are on, the Add Topic permission will take precedence.

- Delete Topic - this permission will allow the users of the group to delete the topics in this category. This permission applies to both the Administration Console and the front-end.

- Modify Topic - this permission will allow the users of the group to modify all topics in the category. Please compare it to the Modify Topic Pending permission. In the event both permissions are on, the Modify Topic permission will take precedence.

- Delete Topic Reply – this permission will allow the users of the group to delete the posts in the topics in this category, but not the topics themselves. This permission applies only to the front-end, since it is not possible to work with posts in the Administration Console. This permission is usually complimentary to the Delete Topic permission.

- View Topic Reply – this permission will allow the users of the group to view the posts in the topics in this category. This permission applies only to the front-

end, since it is not possible to view posts in the Administration Console. This permission is usually complimentary to the View Topic permission.

- Add Topic Reply - this permission will allow the users of the group to reply to topics in this category (create posts). This permission applies only to the front-end, since it is not possible to create posts in the Administration Console. The posts will be created as active and open for posting. It is not practical to have pending posts, as it is not practical for an administrator to be approving posts in real time.

- Reply Topic Modify - this permission will allow the users of the group to modify the posts in this category. This permission applies only to the front-end, since it is not possible to create posts in the Administration Console. The posts will be modified directly in the database, as is not practical for an administrator to be approving post modifications in real time. Please also see the Post Owner Modify permission details.

- Rate Topic - this permission will allow the users of the group to rate the topics in this category.

- Review Topic - this permission will allow the users of the group to submit reviews to the topics in this category.

- Post Owner Modify - this permission will allow the users of the group to modify their own posts in this category. This permission applies only to the front-end, since it is not possible to manage posts in the Administration Console. The posts will be modified directly in the database, as is not practical for an administrator to be approving post modifications in real time. Please also see the Reply Topic Modify permission details.

- Post Owner Delete - this permission will allow the users of the group to delete their own posts in this category. The users will not be able to delete topics with this permission only. This permission applies only to the front-end, since it is not possible to manage posts in the Administration Console. Please also see the Delete Topic Reply permission details.

- Topic Owner Delete - this permission will allow the users of the group to delete their own topics in this category. This permission applies to both the Administration Console and the front-end. Please also see the Delete Topic permission details.

- Modify Topic Pending - this permission will allow the users of the group to modify all topics in the category. The topic modifications will be pending the administrator approval. Until a topic modification is not approved, it will not be visible on the front-end, but the original topic will still be available. Please compare it to the Modify Topic permission. In the event both permissions are on, the Modify Topic permission will take precedence.

- Owner Modify Topic Pending - this permission will allow the users of the group to modify only their own topics in the category. The topic modifications will be pending the administrator approval. Until a topic modification is not approved,

it will not be visible on the front-end, but the original topic will still be available. Please compare it to the Topic Owner Modify permission. In the event both permissions are on, the Topic Owner Modify permission will take precedence. Also, please see the related Modify Topic Pending permission.

- Topic Owner Modify - this permission will allow the users of the group to modify only their own topics in the category. The topics will be modified directly in the database. Please compare it to the Owner Modify Topic Pending permission. In the event both permissions are on, the Topic Owner Modify permission will take precedence. Also, please see the related Modify Topic permission.

- Lock/Unlock Topics – this permission will allow the users of the group to lock and unlock topics in this category. The Topic Modify permissions imply this ability as well.

5.5.3. General Settings

This section contains general In-bulletin settings, which are not related to the topics. In the current version, it has only one setting. 'Select Module Root Category' allows the administrator to specify the module root category of In-bulletin. Clicking on the folder shortcut button will pop up a category picker.

The module root category is used in several ways. On the front-end, in the Default theme, the top menu links each module to its module root category. Therefore, the 'Forums' menu item will open this category and its contents. In the Administrative Console, this setting provides a faster way to navigate in the module, as it presets the category for module-specific actions.

5.5.4. Output Settings

This section allows the administrator to specify the default values for various topic and post settings in In-bulletin.

- Sort topics by – this setting specifies the default primary sort order for the topic listings. It applies both on the front-end, and in the Administrative Console – in the catalog. The first dropdown allows to select the field (an attribute of the topic), and the second dropdown – the direction of the sort.

- And then by – this setting specifies the default secondary sort order. It is set in the same way as the primary, and used when the primary order values are ambiguous. For example, when the primary sort value is 'Topic Name', the secondary order will be used to sort among topics with the same name (subject).

- Number of topics per page – specifies the default number of topics shown per page. This value applies both to the front-end and to the Administrative Console. In the latter, this value can be changed for each session through the View menu.

- Topics Per Page (Shortlist) – this setting is similar to the 'Number of topics per page', but it applies to the front-end short topic lists only. It can be overridden by setting the tag attributes in the appropriate templates.

- New Topics (Days) – this setting specifies the number of days, from the date of creation, during which the topic will be automatically marked 'New' by the system. This setting will only apply to the topics with the 'New' flag set to 'Automatic'.

- Number of posts to be considered popular – this setting specifies the minimum number of posts in a topic for it to be automatically marked 'Popular' by the system. This setting will only apply to the articles with the 'Popularity' flag set to 'Automatic'.

- Minimum rating to be considered hot – this setting specifies the minimum rating of the topic for it to be automatically marked 'Hot' by the system. This setting will only apply to the links with the 'Hot' flag set to 'Automatic'.

- Minimum Votes – this setting specifies the minimum number of votes required for the topic rating to be effective. Usually, when only a small number of users have voted on a topic, its rating will not be statistically accurate - it is likely, that only biased users have voted. When a larger number of users vote, the rating becomes more accurate. The rating of topics with fewer votes then specified in this setting will be undefined.

- Display editor picks above regular topics – this setting will force all topics, marked as 'Editor's pick' to be displayed above the other topics, regardless of their priority or sort order. This is very similar to the 'sticky' feature of other bulletin boards. Among themselves, 'Editor's pick' articles will be sorted according to the regular rules.

- Allow Duplicate Reviews – this setting specifies the period during which the same user cannot submit another review on the same topic. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero, the users can submit reviews without this limitation. Please note, that regardless of this setting, the same user will be able to submit a review on another topic immediately after the first review.

- Allow Duplicate Rating Votes - this setting specifies the period during which the same user cannot rate the same topic again. The time can be entered in seconds, minutes, hours, days, months or years. If it is set to zero, the users can rate topics without this limitation. Please note, that regardless of this setting, the same user will be able to rate another topic immediately after the first rating.

- Posts to lock – this setting specifies how many posts in a single topic will it take to automatically lock that topic. If it is set to zero, the topics will never be locked automatically.

- Number of posts per page - specifies the number of posts shown per page inside a topic. This value applies only to the front-end.

- New posts (days) - this setting specifies the number of days, from the date of posting, during which the topic will be automatically marked as having new posts in it.

5.5.5. Search Settings

This section allows the administrator to configure the front-end search options, and the advanced search options.

This section lists all fields representing topic attributes. Next to each field, there is a 'Simple Search' checkbox, which includes this field in the simple search query. By default, only the 'Topic Text' field is included. In general, it makes sense to include only the fields, which may contain text in them, otherwise when a visitor searches for a text keyword, the non-textual fields will be not searchable. Next, there is a 'Weight' text box, in which the administrator can designate the importance of each field during a search. The fields with a larger weight will be more important then the fields with the lower weight. This is used when calculating the topic's relevance to the search keyword, for sorting of the results. The last column is the 'Advanced Search' check. It designates whether a particular field should be displayed on the 'Advanced Search' page and be searchable by the visitors. By default, all fields are included.

Below the list of fields are the Topic Relevance settings.

- Increase importance if field contains a required keyword by – this specifies the percentage by which the weight of a field will increase, when a required keyword is found in that field. A required keyword is one that is preceded with a '+' in the search key phrase.

- Search Relevance depends on _ % keyword – the percentage of relevance that comes from the keyword being found in that topic.

- Search Relevance depends on _ % popularity - the percentage of relevance that is based on the topic's popularity.

- Search Relevance depends on _ % rating - the percentage of relevance that is based on the topic's rating.

5.5.6. Censorship

This section allows the administrator to configure the censorship options. It lists all defined censorship rules, and allows the administrator to manage them. A censorship rule consists of:

- Censorship Id – this is the read-only, unique system ID of a censorship rule. It is empty for new rules.

- Censorship Word – this field contains the "bad" word – text to be replaced. It can be any combination of letters in any language, numbers or special characters.

- Replacement Word – this field contains the replacement text. It can be any combination of letters in any language, numbers or special characters.

5.5.7. Smileys

This section allows the administrators to manage the emoticons, or smileys, available for users to use in posts. By default, Intechnic ships In-bulletin with a predefined set of smileys.

A smiley has the following attributes:

- Emotion Id – this is the read-only, unique system ID of a smiley. It is empty for new smileys.

- Name – this field contains the smiley name, which should be descriptive and designate the nature of the smiley. It appears in the alt tag on the post form, explaining to the users its purpose.

- Key Stroke – this field contains the shortcut keystroke that corresponds to the smiley. When used in a post text, this keystroke will be automatically replaces with the image of the smiley. Familiar keystroke example is ':)', signifying the smiling face.

- Enabled – this field is the enabled flag of the smiley.

- Location – this field can contain either a remote URL of the smiley's image, or it can be used to upload an image from your workstation.

5.5.8. E-mail Settings

This section lists all possible In-bulletin events. Each event has a description, a type – 'User' or 'Admin', a status – 'Enabled', 'Front-end Only', and a 'From/To User'. The description hints about when the event occurs. The type indicates whether the email notification will be sent to the front-end user, or the administrator. The status 'Enabled' signifies that the email notifications for this event are enabled for both the front-end and the Administrative Console. The Front-end Only' status means that the notifications will be sent only when the event occurs on the front end. The 'Disabled' status means no notifications will be sent when this event occurs. The 'From/To User' field specifies the 'From' email for front-end user notifications, and the 'To' email for the administrative notifications. The other, matching pair of addresses ('To' for the front, and 'From' for the admin) is automatically determined by the system based on who initiated the event. The event notification status can be changed by clicking on the toolbar buttons – 'Enable' to enable the notification, 'Disable' to disable it, and 'Front Only' (icon with a monitor) to set to 'Front-end Only' status.

5.5.9. Custom Fields

This section allows the administrator to manage the topic custom fields. The topic custom fields are useful when you need to store additional information about the topics. For example, the topics may have such custom fields, as the language of the topic, the safe audience rating, etc. All custom fields will be automatically used in the Administrative Console, in the Topic Management section. You will need to edit the theme templates for them to appear on the front-end.

- Field Id – this is a read-only field displaying the unique system ID of the custom field.

- Field Name – sets the internal name of the custom field. This is the name you would use to refer to the custom field in the In-tags when designing templates.

- Field Label – this is a read-only field, which displays the language variable name associated with the label of that field, and the value of the variable in the current language (after the colon). The label is used on the front end, and in the Administrative Console, to describe the field to the user who is entering information into it.

- Show on the general tab – this setting controls whether the custom field will be also displayed on the General tab in the Administrative Console, when editing the topics. It is a short cut for frequently used custom fields. All settings below apply only when this is checked.

- Heading – this field contains the language variable of the section heading, under which the field appear on the general tab.

- Field Prompt – this field contains the language variable, which text will appear as the hint bind the field.

- Input Type – this drop down allows the administrator to designate the type of the information stored in the custom field, by specifying the HTML control to be used on the General form.

- List of Values – this field contains all choices for the above HTML controls of type 'radio button' or 'drop down'. The choices must be in the format: "value1 = language variabe1, value2=language variable2". For example, to create a drop down with three choices (One, Two, Three) and their respective numerical values, this field would contain the following: "1=la_one,2=la_two,3=la_three).

6. SUPPORT & CUSTOM SERVICES

6.1. Technical Support

6.1.1. Online Ticketing System

We are confident that your experience with our software will be the best possible. However, should you encounter any difficulties or problems, we are always there when you need us.

Intechnic Corporation takes pride in the quality of our technical support. Please do not hesitate to contact us with any questions related to your copy of any In-portal family product.

The Online support is available to all licensed customers at http://www.in-portal.net/support/online_support.html. You will need to have your Intechnic My Account details available to log into the online support area.

6.1.2. Support Forum

Intechnic Corporation runs and maintains a discussion forum designed specifically for our product users. The discussion forum was created to provide a more comprehensive support for our products and enable our customers to share their opinions and ideas and for us to receive their feedback. The support forum is open to all existing and potential customers, as well as anybody who is interested about our products and services. Please, be so kind to visit the forum at http://support.intechnic.com/forum/

6.1.3. Telephone and Email Support

Sometimes it is better to talk to a real person at the other end of a telephone line, or on the other side of the Internet connection. Intechnic Corporation offers telephone and email support during our business hours. Please call us at 847-816-1231 or email us at support@intechnic.com.

6.2. Customization Services

We are in the business of developing solutions that enhance web sites with functionality and reduce maintenance costs. In-link started as our internal tool, as a base for developing custom sites in the summer of 2000. Since then, we have decided to create a whole family of products and market them to the fellow web developers and site administrators, and that is how In-portal came into existence. Here at Intechnic, we do a lot of custom development, so please do not hesitate to contact us with the specific requests for new functionality. We are readily available to address your needs in a customized version of any of our products. Please call us at 847-816-1231 or email us at support@intechnic.com.

6.3. Hosting Services

. Intechnic Corporation provides hosting accounts that are optimized specifically for use with In-portal and its modules. We offer a wide range of hosting options – from standard, cost-effective virtual accounts to powerful dedicated servers and collocation options. Our hosting packages often come bundled with software or installation discounts.

To find out more about our hosting services, please visit us on the web at
http://www.intechnic.com/services/webhosting.php.

7. FUTURE DIRECTION

This is only the beginning of In-portal and its capabilities. Here at Intechnic, we have far-reaching plans for the future development. Our primary goal is to deliver the solutions that address the current needs of our customers. To achieve that goal, we will be constantly releasing new versions of the existing products – In-link, In-newz and In-bulletin, as well as creating other modules to enhance the overall strength of the In-portal product family.

To keep in touch with all of the recent developments, please check back on our web site, http://www.in-portal.net, and participate in our online discussion forum. Be on the lookout for some exciting additions in the coming months!