DOCStudio: Dynamic Online Content Studio

Administrator's Manual

Version 3.5

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When the DOCStudio system was set up for your site, an administration area was created, along with a username and password for secure access to the administration features.

The URL for your site's DOCStudio Admin Area is:
http://www.yourdomain.com/admin
(replace yourdomain.com with your actual domain name)

You should bookmark this URL so it is easy for you to access this area.

When you go to the URL above, you will be asked for either your email address or a username, along with and password. Enter the login information you were assigned and click "Login." You will be logged in and taken to the DOCStudio Admin Main Page.

If you wish, you may change your username/email address and password in the Manage Users Area. You may also give other people access to your DOCStudio Admin area by creating a User Account for them and assigning them an Access Level of "DOCStudio Admin." For more information, see the "Managing Users" sections of this manual.

The DOCStudio Admin Main Page

On the DOCStudio Admin Main Page and throughout Admin you will see links in the blue column on the left of the page. These links make it easy for you to access the major administrative functions. Just click one to take you to that admin area.

Also at the top of each page is "You are here" pathing. This shows where you are in the DOCStudio Admin system. You may click the links in the pathing to navigate up a level.

From the DOCStudio Admin Main Page you can jump to these Admin areas:

> **Manage Site Content:** Use link to create new pages, edit existing pages, create or edit sections, and add or edit targeted e-commerce or editorial elements. For more information, see the "Managing Content" sections of this manual.
>
> **Manage User Accounts:** Use this link to add new users, edit user information and set access levels. For more information, see the "Managing Users" sections of this manual.

View Site Stats: Use this link to generate reports for page requests, keyword searches and unique visitors. For more information, see the “Site Stats” sections of this manual.

Manage Store: If your site includes a DOCStudio store, use this link to add or edit products, view transactions and manage other store features.

Go to the homepage of the site: This link is simply a convenient way to go to your site’s homepage.

Once you have logged into the DOCStudio Admin Area, when you visit your site, you will see drop-down menus at the bottom of every page. These menus allow you to quickly access administrative features for the page and section you are looking at on the site. These drop-downs are only available to DOCStudio Admin users while they are logged in. Normal visitors to your site do not see these drop-downs. If you are on your site and you don’t see the drop-downs, but want them to appear, go to your DOCStudio Admin URL and log in. Then use the link on the DOCStudio Admin Main Page to go to the homepage of your site.

DOCStudio: Managing Content: Introduction

Accessing the Manage Content Area

To access the main administration page of the Manage Content area, click the “Content” link in the left blue bar of any DOCStudio admin page.

What is Dynamic Content?

Today, nearly every major website delivers its pages dynamically. This means that each page is assembled on the fly when the viewer requests it, rather than having the page pre-built in a flat HTML file.

The benefits of delivering pages dynamically are many:

- each page can be customized based on who is viewing it
- pageviews can be tracked more effectively, with more information about who is viewing the page
- targeted advertising can be inserted in real time
- updates to site navigation or template design are instantly applied to the entire site
- pages can be added, deleted or moved easily; links to those pages are automatically updated
- maintenance-free search functionality
- easy to integrate “plug-in” cgi functionality

With DOCStudio, you only need to worry about the main area of the page; the site navigation, “you are here” links, template graphics, advertising and everything else is generated automatically.

The Manage Content Admin Main Page

From the Manage Content Main Page you can:

Create a new section: Use this link to create a new section or sub-section. For more information, see the “Creating Sections” section..

Create a new page: Use this link to create a new page in your site. For more information, see the “Creating Pages” section.

Edit a page: Use this link to select a page to edit. For more information, see the “Editing Pages” section.

Create new targeted element: Use this link to create a new targeted e element for your site. For more information, see the “Creating Targeted Elements” section.

Edit targeted element: This link takes you to the main page for editing existing targeted element for your site. For more information, see the “Editing Targeted Elements” section.

Manage image files: If your site is configured for file uploads, this link takes you to a page for uploading and deleting files in your image directory.

Manage downloadable files: If your site is configured for file uploads, his link takes you to a page for uploading and deleting PDF and other downloadable files in your PDF and Files directories.

Go to the homepage of the site: This link is simply a convenient way to go to the site’s homepage.

Understanding Sections and Pages

Websites created with DOCStudio are organized into sections. It is a very good idea to plan how the information on your site will be organized before you start building your site. You want your site’s pages (the *content*) to be organized in a way that makes it easy for your visitors to find what they are looking for. A good way to do this is to group pages that have similar content into sections. For instance, if your site is all about knitting, you might have a section titled “yarn”. This section would contain all the pages that deal with the topic of yarn. Another section might be titled “patterns” and would contain all the pages with patterns. In fact, the “patterns” section might have sub-sections such as “sweater patterns” and “scarf patterns”. The sections are what make up the navigation: visitors click on a section name to go to the pages in that section.

Every page must be in a section. The difference between a page and a section is that a page is your content – an article or a scarf pattern – while a section is just a container for the pages. However, sections and pages are interdependent: a page *must* live in a section, and a section must have at least one page (the *section main page*). When you create a new section, you are forced to create the section main page; this is the page the visitor gets when she clicks on the link to that section in the navigation. When you create a new page, you are forced to choose a section that page will live in.

There may be times that you want to create a stand-alone page, not a whole section of pages. Because every page must be contained in a section, you will still have to create a section for that page, and that page will be the only page in the section. For instance, you may want a “Contact Us” page that is a single page with your phone number and email address. If you want a link to this page to appear in the navigation, you will have to create a section called “Contact Us” – only sections appear as navigation links. The section main page (the page with your contact info) will probably be the only page in this section. However, if you don't need a link to this page in your navigation, you could place the page in an existing section that is appropriate.

DOCStudio: Managing Content: Sections

Creating Sections

To create a new section, click “Create a New Section” on the main Manage Content page. (If you are logged into DOCStudio and are looking at a page on your site, you can select the “New section here” link from the “New…” drop-down at the bottom the page.)

You will be presented with a form to enter information about the section you wish to create. All fields must be filled in.

Fill in each field as follows:

Parent Section: This defines where the section fits into the site. If the new section is a top level section (meaning it is a major area, not a subsection of an existing section), select “Root” as the Parent Section. For instance, if you are creating a Patterns section for your knitting site, it will be a top level section with a parent of “Root.” But if you are creating a Sweater Patterns area, it is a subsection of Patterns, so its parent would be “Patterns.” You should create the top level sections for your site first, then create the subsections under each one. Note that if you select a different Parent Section from the drop-down menu, the page reloads. Be sure to wait until the page has completely reloaded.

Sort Order: This drop-down lets you choose where the section you are creating will appear in the navigation. You may also select “Do not show links to this section” if you don’t want the section to appear in the navigation.

Section Name: This is the name that will appear in the navigation, so it should be concise and clear. For instance, “Patterns”.

Filename for Section Main Page: This field will automatically fill in based on the Section Name you typed. It is usually a good idea to accept the automatic value. If you choose to type your own filename, do not use any spaces or unusual characters, and do not include an extension (i.e. “.htm”).

Access Level: Select “Available to all” or “Only Members”. If you select Only Members, the section will not appear in the navigation unless the visitor has a User Account for your site and she is logged in. For more information, see the “Managing Users” section.

Include in Sitemap: Check this box if you want the section and its pages to appear in the sitemap.

Section Colors: (optional) If your site uses different color palettes for each section, enter the colors for the section, separated with commas. You may enter hex values (#0000ff) or word values (blue). Leave this field blank if you're not sure what to do.

When you have entered information in each field, click "Save Section & Continue". You will be taken to the Create Section Main Page form. You must now create the main page for the section: this is the page the visitor is taken to when she clicks a navigation link to your new section. Because this process is exactly the same as creating any new page for your site, please see the "Managing Content: Pages" section of this manual for information about how to create the section main page.

Note that once you click "Save Section & Continue" on the Create Section form, the section is live on your site. So it is a good idea to have the content for the section main page ready to go so you can create the section main page quickly.

Editing Sections

To edit an existing section, go to any page in that section on your site and select "Edit this section" from the "Edit…" drop-down at the bottom of the page. If you don't see the drop-down, go to the DOCStudio Admin URL and log in, then return to your site and reload the page.

The Edit Section page shows all the data you entered for the section when you created it. You may edit any or all of the fields except the Filename for Section Main Page.

To delete a section, click "Delete This Section". This action is irreversible and also deletes all the pages in the section. If the section has subsections, you must delete those first.

DOCStudio: Managing Content: Pages

Creating Pages

To create a new page, click “Create a New Page” on the main Manage Content page. If you are logged into DOCStudio Admin and are looking at a page on your site, you can click the “New page here” link in the “New…” drop-down at the bottom the page. Be sure you are in the section that you want the new page to be in.

You will also be creating a new page when you create a new section because you will be forced to create the section main page immediately after you click “Save Section & Continue”.

On the Create New Page (or Create Section Main Page) form, you will be asked to enter information about the page you wish to create.

Fill in each field as follows:

> **Section:** Select the section you want the page to be a part of. (Not necessary if creating a section main page.) Note that if you choose a different section from the drop-down, the page will reload.
>
> **Sort Order:** Choose where the page will appear in Page Index Lists (see the “Dynamic Elements” information later in this section). You may also select “Do not show links to this page” if you don’t want it to appear in Page Index Lists.
>
> **Flag as New:** Check the “Flag as new” checkbox if you want a “New!” graphic displayed next to the page title in Page Index Lists for two weeks.
>
> **Page Title:** Enter a title for the page. This title will be displayed as a headline on the page and in links to the page.
>
> **Edit <title>:** By default, the text you enter into the Page Title field is used for the <title> tag. The <title> tag is what appears in the top bar of your browser window when you are viewing the page and is used by search engines. If you want to create your own <title> tag (usually 10-15 words, which would be too long for Page Indexes and DOCStudio search results), click the “Edit <title>” link. A small window will pop up with a field for your tag. Type your tag and click “Save”. Close the small window when you are done.
>
> **Abstract of Page:** Enter one or two sentences that describe the contents of the page. The abstract is important because outside search engines, such as Excite, LookSmart, Google and AltaVista, use the abstract to index the page in their system. The abstract also appears on the search results page when a visitor uses the search feature on your site.

Keywords: Enter a few keywords that describe the contents of the page, separated by commas. Usually 6-12 is a good number. For instance, a page about Yarn might have these keywords: thread, string, wool, cord, cotton, knitting thread, fiber, synthetic.

Include in Searches & Sitemap: Check the checkbox if you want the page to be included when a visitor uses the search feature on your site and on the sitemap. Note that unchecking this box will not necessarily stop outside search engines from indexing the page.

Filename: This field will automatically fill in based on the Page Title you typed. It is usually a good idea to accept the automatic value. If you choose to type your own filename, do not use any spaces or unusual characters, and do not include an extension (i.e. ".htm"). Every page must have a unique filename.

Author(s): This field may be automatically filled in, but may be changed if you wish. Separate multiple authors with commas.

Last Edited: This field is automatically filled in, but may be changed if you wish. The date format must be MM/DD/YYYY, for instance, 01/02/2002.

Access Level: Select "Available to all" or "Only Members". If you select Only Members, visitors will have to have a user account and be logged in to view the page. For more information, see the "Managing Users" section. You may also make a page accessible only to DOCStudio Admins.

Related Page Links: If your site is configured to include links to related pages, this is where you tell DOCStudio which other pages are related to the one you are creating. You may either type in the Filename for each related page, separated by commas, or use the Sitemap (click the "use sitemap" link). On the sitemap, click on each page you want included; the Related Pages field will auto populate.

Dynamic Elements: The options you see in this drop-down menu will vary depending on your DOCStudio configuration. Select an Index type, "Include a File" or "Multiple Tags". When you select something other than "None", a tag is automatically inserted into the Page Body field below the drop-down. This tag may be placed anywhere in the page body, but you must have *both* the tag and the appropriate choice selected in the Dynamic Elements drop-down for the element to appear. If you select Multiple Tags, you may use up to one of each of the elements; just place the appropriate tags where you want them in the page body. For more information, see the "Dynamic Elements" information later in this section.

Allow Targeted Elements: Check this box if you want targeted elements to appear on this page (assuming there are elements targeted to the section in which you are creating the page). For more information, see the "Managing Content: Targeted Content" section.

Thumbnail: If your site is configured to support Thumbnail Indexes, this is where you paste the code for the thumbnail image. The thumbnail code should be a standard <img> code, generated by using the “add image” functionality. Click the “add image” link to upload an image or select one from your image directory, then paste the code into the Thumbnail field.

Page Body: This is where you enter the actual text for your page. You do not need to know HTML to create exciting pages in DOCStudio; simply check the “Convert blank lines” checkbox, and type your copy in the box. Wherever you want space between paragraphs, enter a blank line. A headline is automatically entered at the top of the page body; you may edit or delete it. If you know HTML and want to include images, bulleted lists or text formatting, you can enter the HTML into the box. See the Appendix for some basic HTML you can use to spruce up your pages.

**Convert blank lines to HTML
 linebreaks:** Check this box if you are just entering basic text and want DOCStudio to convert your linebreaks into HTML
 tags. In general, unless you are using tables or other complex html, it is best to just type your text and let DOCStudio convert it to HTML.

Add Image: If your site is configured to support file uploads, click this link to upload a new image or use an image you have already uploaded. Clicking the link pops up a small window. At the top of the window is the Upload New Image area. To upload a new image, click the “Browse” drop-down to find the image file on your hard drive. The file must end in either .gif, .jpeg or .jpg. Once you have selected the file, click the “Upload” drop-down. The window will reload with the new image selected in the dropdown menu under “Use Image from Image Directory” and an HTML tag for the image in the bottom box. You may select how you want the image aligned and type an <alt> tag (an invisible caption) if you like. To place the image tag into your Page Body (and thus add the image to your page), click the “Click here” link near the bottom of the window; this will place the image after any text that is already in the Page Body field. To place the image somewhere else, select all the code in the bottom field, copy it, and then paste it into the Page Body field (back in the big window) where you want the image to appear. Close the small window when you are done. More information about adding images is below.

Add Click-to-pay: If your site is configured to support click-to-pay drop-downs, click this link to build a click-to-pay tag. Clicking the link pops up a small window, and only letters, numbers, commas and periods are allowed in any of the click-to-pay fields – do not use any quotes, etc. Fill in the Product Price and Product Name fields, for instance: “50.00” and “Public Speaking Workshop”. The Return Page field tells DOCStudio where to take the user once her transaction is complete. For instance, after the user has entered her credit card information and paid, you will probably want to display a “Thank you for your purchase” page, so you would enter the filename of the “Thank you” page in the Return Page field. (If you don’t have a “Thank you” page, leave the default value in this field (the page you are putting the drop-down on) – the user will still get an automatic message informing her that the transaction was successful.) If the drop-down is for a downloadable item such as a pdf file, the return page should be the object name of the file to be downloaded. (Instructions for uploading files and creating click-to-pay buttons for them can be found in “Managing Content: Downloadable Files”.) In the Button Text field, type the words that should appear on the click-to-pay button, e.g. “Click here to register”. If you wish, you may specify a button color and button text color. A white button with black text is the default. Copy **all** the text in the bottom box and paste it into the Page Body field (back in the big window) where you want the button to appear. Close the small window when you are done.

Add HTML Snippet: If your site is configured to support HTML Snippets, click this link to pop up the snippet window. In the small window, select the snippet you want from the dropdown menu and then copy all the text in the bottom box. Paste the text into the Page Body field (back in the big window) where you want the snippet to appear. Close the small window when you are done.

Template: If you have more than one template for your pages, select the one you want the page to be “wrapped” in. If the page should display in a small pop-up window, check the “Display in popup” checkbox. The size of the popup window is controlled in the template file for the page that opens the popup. Note that only links created by DOCStudio (e.g. Page Indexes and site navigation) will automatically generate the popup link.

CSS: If your site is configured to support multiple cascading style sheets, select the style sheet you want to use for this page from the dropdown menu.

Auto-Expire: If your site is configured to support auto-expire and you want the page to be automatically deleted on a certain day, check the checkbox and select a month, day and year.

When you have entered information in each field, click either “Preview” or “Save”. **Important:** If you choose to preview the page, be sure to close the preview window when you are done and click “Save” on the Create Page form. The page is not live until you click “Save”. Once you click “Save”, the page is live on your site and you will be taken to the new page.

Editing Pages

To edit an existing page, go to the page you wish to edit on your site (either navigate to it or use the search function) and click “Edit this page” in the “Edit…” drop-down at the bottom of the page. If you don't see the drop-down, go to the DOCStudio Admin URL and log in, then return to your site and reload the page.

You may also edit a page by clicking the "Edit a Page" link on the main Manage Content page in the DOCStudio Admin area. You will be presented with a map of your entire site. Click the link to the page you wish to edit. Note that the site map only goes to pages five levels deep (sub-sub-sub-subsections). If you don't see the page you want to edit, use the method described in the previous paragraph.

The Edit Page form shows all the data you entered for the page when you created it. Change what you want, then click "Preview" (be sure to go back and save) or "Save Changes".

To delete a page, click "Delete This Page". This action is irreversible. Note that you cannot delete a section main page because every section must have a main page. You must delete the section to delete the section main page.

Dynamic Elements

One of the major benefits of using DOCStudio is that every page of your site is built on the fly in real time, rather than having every page stored as a static HTML file; this is called "dynamic". Because DOCStudio only assembles a page when a visitor requests it, DOCStudio can insert content into the page. DOCStudio inserts two types of dynamic content: Dynamic Elements and Targeted Content (see the next section for more about Targeted Content).

Because Dynamic Elements are generated on the fly, they are always up to date. When you add a new page, a link to it will automatically appear in the appropriate Page Indexes. It is a good idea to always use Dynamic Elements for navigation within your site rather than hard-coded links.

The different types of Dynamic Elements are described below; the options you see in your Dynamic Elements menu depend on your site's configuration.

> **Section Index:** A Section Index is a list of all the subsections in the current parent section. Usually a Section Index is placed on a section main page so that visitors can see what topics are in the section and navigate to the subsection they want. For instance, if the visitor is on the main page of the "Patterns" section, the Section Index would display links to the subsections "Sweater Patterns", "Scarf Patterns" and "Booty Patterns".
>
> **Section Index, 2-column:** On most sites, Section Indexes will automatically display in two columns as long as there are more than five links. On sites that are

not configured to automatically break the Indexes, this option forces a 2-column Index.

Section Index with Pages: This option displays links to all the subsections in the current parent section, along with the pages under each subsection.

Page Index: A Page Index is a table of contents of all the pages in the current section. A Page Index is usually placed on the main page of a section or subsection so that visitors can see the contents of the section. For instance, if the visitor is on the main page of the “Sweater Patterns” subsection, the Page Index would display links to the pages “Alice’s Argyle Pattern”, “Carrie’s Cardigan Pattern” and “June’s Jumper Pattern”.

Page Index, 2-column: On most sites, Page Indexes will automatically display in two columns as long as there are more than five links. On sites that are not configured to automatically break the Indexes, this option forces a 2-column Index.

Page Index with Abstract: This is the same as the Page Index, but each link includes the abstract that was entered when the page was created.

Page Index with Abstract & Details: If your site is configured to show expanded details for portal links, this element displays the Source, Type, Author, Publish Date and File Size below the abstract.

Thumbnail Index: If your site is configured for Thumbnail Indexes, this element displays thumbnails of each of the pages in the current section. Each page must have an image tag entered into the Thumbnail field on the Create/Edit Page form for its thumbnail to display.

Insert a File: This element lets you automatically insert frequently used text or HTML. For instance, if you frequently put some “about us” information on your pages, it would be a good idea to put the information in a file, then use the Insert a File Dynamic Element on the appropriate pages. That way, if your “about us” information changes, you only need to update it on one page, rather than on every page it appears. See below for instructions on creating and using this Dynamic Element.

Multiple Tags: You may place more than one Dynamic Element on a page; see the instructions below.

To place a Dynamic Element on one of your pages, select the one you want from the drop-down menu on the Create/Edit Page form. When you select an Element, a tag is automatically generated in the Page Body box. Copy the tag and then place it within the page’s text where you want it to appear. **Important:** the Element selected in the drop-down must match the tag in the Page Body box. Note that if you select a different

Dynamic Element from the drop-down, the previous tag is not removed from the Page Body box.

Insert a File: To insert a file on a page, you must first create the file you wish to insert. Simply go through the process of creating a new page (see “Managing Content: Pages”). If the content of the page is not really a page (such as your “about us” info which might be just a bit of boilerplate) be sure to select “Do not show links to this page” and uncheck the “Include page in searches”. Make a note of the filename you choose for the page. Click “Save” to create the page.

Now, on the page in which you wish to insert the file, select “Insert a File” from the Dynamic Elements drop-down menu. A tag is inserted into the Page Body box. Change the tag by replacing the word *filename* with the actual filename of the file you wish to insert. Be sure to place the filename inside the double quotes. For instance, if the filename of the About Us page is about_us, change the tag to look like this:
<!--insert file “about_us”-->

Note: Inserting files can cause your pages to load a little more slowly, so don’t use the Insert a File Dynamic Element for things that will appear on nearly every page; instead put that content into your template.

Multiple Tags: To include more than one Dynamic Element on a page, first generate each tag you want by selecting it from the drop-down menu (which will generate the tag in the Page Body box). Then, select “Multiple Tags” from the Dynamic Elements dropdown.

Adding an Image

As mentioned above, you may include HTML in your page body, including image tags. DOCStudio can create image tags for you; just click the “Add Image” link above the Page Body field.

A popup window will open with two areas: “Upload New Image” and “Use Image from Image Directory”. If you have already uploaded the image you wish to include in the page body, you do not need to upload it again. If you want to upload a new image, click the “Browse” button in the “Upload New Image” form and locate the image on your hard drive. When you have found the image and its filename appears in the “File” box, click the “Upload” button. The file will be uploaded to your image directory and the window will reload.

To use an image you have already uploaded to your image directory (including a new one you may have just uploaded), use the “Use Image from Image Directory” form. Select the image you want to use from the “Use Image” drop-down menu.

If you want to align the image to the left or right of the text in your page body, select that option from the “Align Image” drop-down. Otherwise, use “Inline” alignment.

If desired, you may type an “alt tag”. This will attach an invisible caption to your image. This caption displays while the image loads and is indexed by some search engines.

After you have selected the image you want to use and set the optional alignment and alt tag, you will see HTML code in the box at the bottom of the window. This HTML tag is what causes the image to display on your page. To move the tag into your Page Body (and thus display the image on your finished web page), click the “Click here” link directly above the bottom box. This will place the image at the end of any text that is currently in the Page Body box. *Note: you won’t see the image itself, just the HTML code. To see the image, click the Preview button.* If you want to place the image somewhere other than the end of the text that is already there, don’t click the link and instead click in the box at the bottom of the form. Select all the code in the box and copy it. Close the popup window to return to the main Create Page form. Paste the code you just copied into the page body where you want the image to appear. You may need to preview the page a few times to determine the best place for the code.

DOCStudio: Managing Content: Targeted Content

Targeted Elements

DOCStudio allows you to create exciting advertisements or editorial sidebars which can be automatically inserted into any page, targeted by the section the page is in.

For instance, you can create a targeted element that is an advertisement for a book about yarn. Assuming you have a section on your site devoted to yarn (doesn't everybody?), you would target this element to the yarn section. When a visitor is reading a page in your yarn section, the book advertisement will be automatically incorporated into the page.

This system makes it easy for you to manage your advertisements and promos. Because DOCStudio inserts the ad dynamically, you only need to change the ad in one place and the change will be replicated everywhere the ad is inserted.

When more than one element is targeted to the same section, the elements are inserted randomly.

It is important to note that targeted elements only appear on pages for which you checked the "Allow Targeted Elements" checkbox when you created or edited it. If you wish to add a targeted element to an existing page, edit the page and check the Allow Targeted Elements checkbox. For more information, see the "Creating Pages" section.

Additionally, a targeted element will only be inserted onto pages in sections you selected when you created the element.

Creating Targeted Elements

To create a new targeted element, click "Create new targeted element" on the main Manage Content page.

You will be presented with a form to enter information about the element you wish to create. All fields must be filled in.

Fill in each field as follows:

> **Element Title:** This information is not shown when the element is displayed. It is simply a way for you to keep track of which element is which, so give your element a descriptive name such as "All About Yarn book ad".

Element Position: Select a position from the drop-down menu. If your templates are configured to have several positions for targeted elements, this option determines into which position the Element will be inserted. You may create your own positions within the Page Body of any page by using the tag <!--docstudio targeted_element_#--> (replace the # with the number of the position).

Target to These Sections: Check the box next to each section you wish the element to appear in. When you check a section that has sub-sections, its sub-sections are automatically checked. If you do not wish the element to appear in the sub-sections, just uncheck them.

Element Text/HTML: Enter the content for your element. The content can be basic text or HTML code including images, links, forms, etc. If you want DOCStudio to automatically convert blank lines to HTML
 code, check the "Convert blank lines" box.

Add Image: If your site is configured to support file uploads, click this link to pop up the Add Image box. Upload a new image or select one from your image directory as described in the Create Page section earlier in this manual.

When you have entered information in each field, click "Preview" to preview your element or "Save Element" to save it and return to the Manage Content main page. **Important:** When you preview an element, it is not saved; on the preview page you must click "Go Back & Edit or Save", then click "Save Element". It is a good idea to preview your element, since the elements are inserted randomly. If you have a lot of elements targeted to the same section, it might take several tries to see your new element.

Editing Targeted Elements

To edit an existing targeted element, click "Edit targeted element" on the main Manage Content page.

You will be presented with a drop-down menu of all the targeted elements you have created. Elements that have been left in "preview" mode are noted as such. Select the element you wish to edit and click "Edit".

The Edit Targeted Element page shows all the data you entered for the element when you created it. You may edit any or all of the fields.

To delete an element, click "Delete This Element". This action is irreversible.

Why Don't I See My Element?

If you just created a new element and you aren't seeing it in the section you targeted it to, try these steps:

- On the page you are viewing, click “Edit this Page”. Look at the “Allow Targeted Elements” checkbox. Is it checked?
- Did you leave the element in preview mode? Check the drop-down menu on the main Edit Targeted Elements page to see if “*preview*” is noted next to your element.
- Are you sure you are in a section you targeted the element to? Use the Edit Targeted Elements page to edit your element and be sure the section you want is checked.
- Do you see other targeted elements on the page you are viewing? If so, hit the Refresh button on your browser to load the page again. Continue to refresh until you see your element. Because the elements are loaded randomly within each section, your “dice rolls” may be coming up craps every time. Another problem may be that your browser is caching the page (Explorer is especially bad). Try switching to a different browser or just keep trying.

How the Elements are Displayed

The placement of the elements on the page is determined by the site template. If you know HTML, you may edit this file, but be careful! It’s probably better to contact your DOCStudio technician.

The text style for targeted elements is controlled by the cascading style sheets in the site template. You can override these with <font> tags of your own, but it may be more convenient to change the style sheet in the site template file.

DOCStudio: Managing Content: Image Files

Deleting Image Files

To delete an image from your image directory, click “Manage Image Files” on the main Manage Content page.

You will see a list of all the images in your directory. Click the filename of an image to view the image in a new window. The width and height of the image are also displayed in the list.

To delete an image, check the box next to it. When you have checked all the images you wish to delete, click “Delete Checked Images”. The image files will be deleted and the page will reload with the new file list.

Uploading Image Files

You may also upload images to your image directory on this page. Click the “Browse” button to find the image file on your hard drive. Once you have selected the image you want, click the “Upload” button. The image will be uploaded and the page will reload with the updated file list.

DOCStudio: Managing Content: Downloadable Files

Downloadable files are "File Links" you've added to your site. These PDF, MSWord and other files are managed using the Manage Downloadable Files page.

Deleting Files

To delete a file from your files directory, click "Manage Downloadable Files" on the main Manage Content page.

You will see a list of all the files in your directory. Click the filename of a file to open it in a new window. The file type (PDF, etc.) is also displayed in the list.

To delete a file, check the box next to it. When you have checked all the files you wish to delete, click "Delete Checked Files". The files will be deleted and the page will reload with the new file list.

Uploading Files

You may also upload files to your files directory on this page. Click the "Browse" button to find the file on your hard drive. Once you have selected the file you want, click the "Upload" button. The file will be uploaded and the page will reload with the updated file list.

If the user must pay in order to download the file, be sure to put the file in a section noted with [$]. If you need to have a "payment required" section added to your site, contact your DOCStudio technician.

Building a Link to a File

An easy way to build a link to a file in your files directory which you can use in the Page Body of any page is to click the "Build link to this file" link next to the file you wish to link to. A new window will pop up with a box containing code for the link. Copy all the code in the box and paste it into the Page Body of the page on which you want the link. Close the small pop up window when you are done.

Making a Click-to-Pay Button

If your site is configured for click-to-pay buttons and "soft goods" sales, you may build a click-to-pay button for any of the files in your file directory (for instance, if one of the files is an e-book PDF you are selling.) Click the "Make click-to-pay button" link and follow the instructions outlined in the Create Page section earlier in this manual. You may insert the button into the Page Body field of any page.

DOCStudio: Managing Users: Introduction

Accessing the Manage Users Area

To access the main administration page for Manage Users, click the "Users" link in the left blue bar on any DOCStudio admin page.

What is a User?

DOCStudio defines a User as a registered username account, i.e. anyone with a valid username and password with which to log into the site. A person who is visiting the site but does not have a username and password is not considered a User, even though their visit is recorded and their computer is tagged with a DOCStudio ID number.

For users, we have registered information such as email address and gender. For people who are just visiting, we only know whether they are unique or not; we do not know their email address, etc. unless they have provided that somewhere on the site.

Note: some sites are configured to use email addresses instead of usernames to log in.

The Manage Users Admin Main Page

From the main page you can:

Show all users: This link displays a page of all registered user accounts. For more information, see the "Show All Users" section.

Create a new user account: This link takes you to the form for adding a new user. For more information, see "Creating a New User Account".

Go to the homepage of the site: This link is simply a convenient way to go to the site's homepage.

Search for user: Enter either a username (or portion) or a user's email address (or portion) to find users who match. For more information, see "Searching for Users".

Show All Users

Clicking "Show all users" displays a page of all registered user accounts in alphabetical order. If there are several hundred users, this page may take several seconds to load.

To see more information about a user, to edit a user's account, or to delete a user, click on the user's username.

Searching For Users

If you know the username you wish to view or edit, enter it in the "Username" field on the main Manage Users page or any other page the Search Users form appears. If you do not know the entire username, enter a portion of it. Then click "Find".

If DOCStudio finds only one match for the username you entered, you will be taken directly to the Edit User Account page for that user. If there are multiple matches, you will be presented with a list of matching usernames; click on a username to view or edit.

You may also search for users by their email address or names. This is useful if a user emails you but does not provide her username.

To search by email address, simply enter the address, or a portion of it, in the Email Address field on the Search User form at the bottom of the Manage Users page (or any other page with a Search Users form). Then click "Find".

To search by name, simply enter the first and/or last name in the First/Last Name field on the Search User form at the bottom of the Manage Users page (or any other page with a Search Users form). Then click "Find".

The results of an email address or name search function exactly the same as a username search.

DOCStudio: Managing Users: User Accounts

Creating a New User Account

To create a new user account, click "Create a new user account" on the main Manage Users page.

You will be presented with a form to enter information about the user. All fields must be filled in. If you don't know all the information about the user, enter a default value or a "?". The reason so much information is required is to add value to both the user and to your business. The more information you know about your users, the better you will be able to market to them. Additionally, the user benefits by receiving only the communications that are appropriate for her and also enjoys a personalized environment on your site and improved customer support, such as automated "forgot password" assistance.

Note that depending on your DOCStudio configuration, you may not see all the fields listed below.

Fill in each field as follows:

> **Username:** Can consist of letters, numbers and underscores. No spaces or other non-word characters. While the limit is 36 characters, it is best to keep usernames under 12 characters. Usernames must be unique; if you enter a username that is already associated with a user account, you will be asked to enter a different username. **Note:** if your site is configured to use email addresses instead of usernames, this field is not present.
>
> **Password:** Can consist of letters, numbers and underscores. No spaces or other non-word characters. While the limit is 36 characters, it is best to keep passwords under 12 characters.
>
> **Email:** Type this important information carefully! It is used to send automated customer support to the user and is the only way DOCStudio can contact a user directly.
>
> **Gender:** At this time, DOCStudio accommodates male and female users.
>
> **Date of Birth:** The user's date of birth must be in the format MM/DD/YYYY. If you do not know the user's date of birth, use the default date of today. This will insure that the user never receives marketing targeted to users over 18.
>
> **Zip Code:** Enter the user's US zip or foreign postal code. There is no required format for this field.

Country: Enter the country the user currently resides in. While there is no required format for this field, you should use a consistent naming system for each country. For instance, if you enter "UK" for one London resident, be sure not to enter "England" for another. Consistent country information will enable targeted international marketing.

First Name: Enter the user's first name. This appears when the user logs in and in customer service emails.

Last Name: Enter the user's last name. This appears in customer service emails.

Access Level: There are 3 standard access levels

Non-Member: Gives access to all areas of the site that do not require login. Basically, this is just a visitor for which we have more information.
Member: Gives access to all areas of the site, including "Member Only" sections and pages (requires the user to login).
DOCStudio Admin: Gives the user access to the DOCStudio admin area. **Warning!** Anyone with DOCStudio Admin privilege can edit every page on your site, harvest user data, and even delete your site!

Restrict Access: To restrict a DOCStudio Admin capabilities to only certain areas (e.g. only the Admin may only edit/add pages to a particular section of the site), click the "Add Sections" link. In the small popup window, click the names of each section you want the Admin to be able to access. Note that clicking a section automatically grants access to the sub-sections under it. When you are done, close the popup window. To clear all sections, click the "Clear all" link.

When you have entered all the data, click "Create User Account" to save the information and activate the user's username and password. Be sure to send the new user an email to inform her of her new username and password so that she can start using the restricted areas of your site.

Editing a User Account

To edit a user's information, find the user by either using the Search Users form at the bottom of the main Manage Users page, or by clicking "Show all users" and clicking on the username you want to edit.

The Edit User Account page shows all the data you entered for the user when you created the account. You may edit any or all of the fields. Note that if you change a user's username or password, you must inform them so that they will be able to login.

To delete a user account, click "Delete This User Account". **Warning!** In general, it is not a good idea to delete a user account, as you may wish to market to that user in the future. If you just want to stop the user from accessing Members-only pages, simply change their “Access Level” to Non-Member.

Three additional fields of information are also displayed when you edit a user’s account: User ID #, Registered On date and Last Modified date. These fields are assigned by DOCStudio and cannot be changed.

DOCStudio: Site Stats

Accessing the Site Stats Area

To access the main administration page for Site Stats, click the "Stats" link in the left blue bar on any DOCStudio admin page.

What Site Activity is Tracked?

DOCStudio records the following statistics in monthly logs:

> **Keyword Searches:** When a person enters a word to search for on your site, that word is recorded, along with the date, time, DOCStudio tracking ID and the number of results the search returned. This information can be useful to see what your visitors are looking for on your site. Note that DOCStudio only records searches performed on your site, not search engine sites such as Yahoo. For more information, see "Keyword Reports".
>
> **Page Requests:** Each time a person (both logged-in users and visitors) requests a page in the DOCStudio system, several bits of information are recorded including the date and time of the request, the page requested, the person's DOCStudio tracking ID and the referring page. For more information, see "Page Requests Reports".
>
> **Unique Visitors:** The first time a person visits your site, DOCStudio tags their computer with a unique tracking ID. This allows us to monitor their "click trail" through your site and also keep track of how many unique visitors come to your site each month. For more information, see "Unique Visitor Reports".

What is the DOCStudio Tracking ID?

DOCStudio sets a cookie on every person's computer who visits your site. If the person gets a user account at some point, the tracking ID is replaced with their username. If a person does not accept cookies, they will not be able to be tracked and their activity will be recorded as a unique visitor for each page they request.

On a related note, anyone with a User Account must accept cookies in order to log into the Members Only area of your site.

The DOCStudio tracking ID is composed of useful information including the date and time the user first visited the site and their remote address. However, it is impossible to display the entire tracking ID in the reports because it is so long; only the user's unique number and remote address are displayed. If the visitor enters her email address on your site, her random tracking ID is replaced with her email address.

Some Notes About Site Stats

Because of the immense volume of data being recorded and processed, no site stats program is 100% accurate. Add to this the fact that the same visitor can access the site from different computers (thus being tagged with different IDs), and that some visitors will not accept tracking cookies, and the data gets even fuzzier.

However, DOCStudio uses the latest technology to keep the data as accurate as possible, and this data is suitable to meet most impression-based contractual needs. Most importantly, the DOCStudio Site Stats reports give you the tools you need to monitor who is coming to your site, where they came from, and what they do while they are on your site. This allows you to change your site as needed to leverage the behavior of your audience.

As traffic to your site grows, the report logs will grow very large. In fact, they may grow so large that your servers cannot process them. If this becomes the case, contact your DOCStudio technician.

The Site Stats Main Admin Page

On the Site Stats Main Admin Page, you may choose the type of report you want, and the month of data. Simply select a month for either a Traffic Overview, Page Request Report, Keyword Report or Error Report or a and click “Show”.

Traffic Overview

To generate a Traffic Overview, go to the Site Stats Main Admin Page, select a month and click “Show”. In a few seconds, a page will load with a snapshot view of the activity on your site. This report is useful for seeing trends from month to month.

The Overview displays:

- Total page views and IPs (click the numbers for Page Request Reports)
- Top 20 sections
- Top 20 pages
- Top 10 browsers your visitors used
- Top 10 search engine robots that visited your site
- Top 20 search phrases that resulted in visits to your site
- Graph of total page views for the last several months (click the numbers for Page Request Reports)

To see graphs of total page views for the past 12 months broken down by **section**, click the link at the bottom of the page.

Page Requests Reports

To generate a Page Requests Report, go to the Site Stats Main Admin Page, select a month and click “Show”. In a few seconds, a page will load showing you all the pages that have been requested in the month you selected, sorted by the number of times they were requested.

At the top of the report is the total number of unique visitors (and IPs, which is a somewhat better indicator of actual visitors) and unique outside referrers your site had for the month selected. For more information, see “Unique Visitor Reports” and “Unique Referrer Reports”.

The report has three columns:

- The number of times the page was requested
- The page (click to open the page in a new window)
- A link to details

The Details link generates a new report just for that page. The Details report also has three columns:

- The date and time the page was requested
- The DOCStudio User ID tracking code
- The referring page (click to open the page in a new window)

The “Referrer” is the page the user was on before the current page. This means that the referring page has a link to your page on it. This information is useful to see what other sites are linking to your pages, and to get a sense of how users progress from one page to another on your site. If there are more than 100 hits to the page, use the links at the bottom.

Unique Visitor Reports

As noted above, each Page Requests Report has a link to information about the unique visitors for the month selected.

To generate a Unique Visitor Report, click the link to the unique visitor total on any Page Requests Report. In a few seconds, a page will load with the unique visitor information for that month.

Note: if the total unique visitors displayed on the Page Requests Report is different than the number of visitors displayed on the Unique Visitors Report, it is because users who have managed to bypass the DOCStudio tracking tag (usually search engine robots) are not displayed in the report.

The Unique Visitors Report has two columns:

- The DOCStudio User ID tracking code or IP address
- The visitor's click trail

The click trail is a list of pages the visitor visited over the current month, with the date and time of each visit. Click on the page to open it in a new window.

Most Unique Visitor Reports are several pages long. To page through the report, click the links at the bottom of the page. To see only users whose email addresses have been entered, click "emails only". To see only registered users, click "registered users only".

Unique Referrer Reports

As noted above, each Page Requests Report has a link to information about the unique referrers for the month selected.

To generate a Unique Referrer Report, click the link to the unique referrer total on any Page Requests Report. In a few seconds, a page will load with the unique referrer information for that month.

The Unique Referrer Report has two columns:

- The unique referrer
- The page(s) the referring page linked to

Each link in the second column contains a "click trail" link. This displays the click trail the user who followed the link from the referring page took once they came to your site. Click "click trail" to open the report in a new window.

If you are marketing your site correctly, your Unique Referrer Reports will be several pages long. To page through the report, click the links at the bottom of the page.

Keyword Reports

To generate a Keyword Report, go to the Site Stats Main Admin Page, select a month and click "Show". In a few seconds, a page will load showing you all the keywords that have been entered in the month you selected, sorted by the number of times they were entered.

The report has three columns:

- The number of times the keyword was entered
- The keyword
- A link to details

The Details link generates a new report just for that keyword. The Details report also has three columns:

- The date and time the keyword was entered
- The DOCStudio User ID tracking code
- The number of results the search returned

Error Reports

The Error Reports show a list of pages that were requested that DOCStudio could not find. Usually, errors are generated because a person has mistyped a URL in his browser. To generate an Error Report, go to the Site Stats Main Admin Page, select a month and click “Show”. In a few seconds, a page will load showing you all the pages that could not be found, sorted by the number of times the error occurred.

The report has four columns:

- The number of times the error occurred
- The page requested
- The plugin requested (if any)
- A link to details

The Details link generates a new report just for that error. The Details report has two columns:

- The date and time the error occurred
- The DOCStudio User ID tracking code or IP address

DOCStudio: Maintenance & Backup

Maintenance

DOCStudio should not require any maintenance. However, because DOCStudio relies on PERL, which is provided by your internet hosting service, problems may occur if your hosting service makes changes to its PERL functionality or if it changes the location of its PERL files. You will know if this happens: DOCStudio will cease to function. But don't worry, the problem is usually very easy to correct and no data will be lost. Be sure to tell your hosting service that you are using their PERL functionality and need to be informed whenever they make changes to it.

Backup

Because your site lives on a computer, the same rules apply to backing up your site as apply to your personal PC. If your site is hosted by Level 9 Digital, your files are being backed up daily. But if you are hosting your site somewhere else, you should back up the following directories every month and every time you make major changes to your site:

docs_data
docs_html
docs_archive

You can back up these directories by FTPing into your site and copying the directories to your personal PC's hard drive (which of course you are backing up regularly).

Appendix A: Simple HTML

Text Formatting

Bold

```
<b>Bold Text</b>
```

Italic

```
<i>Italic Text</i>
```

Bold Italic

```
<b><i>Bold Italic Text</i></b>
```

Underline

```
<u>Underlined Text</u>
```

Font Colors

```
<font color=green>Green</font>
<font color=red>Red</font>
<font color=blue>Blue</font>
<font color=purple>Purple</font>
<font color=orange>Orange</font>
<font color=gray>Gray</font>
```

… and 210 others; the complete list is available at:
http://www.level9digital.com/resources/basic_html/color_table

Major Heading

```
<h1>Major Heading</h1>
```

This tag's look and feel is controlled in the DOCStudio template system because we want a consistent look to the way common page elements are formatted. If you want a different look, contact your DOCStudio technician.

Subhead

```
<h2>Subhead</h2>
```

This tag's look and feel is controlled in the DOCStudio template system.

Smaller Text

```
<font class=s1>Small Text</font>
```

This tag's look and feel is controlled in the DOCStudio template system.

Larger Text

```
<font class=s3>Large Text</font>
```

This tag's look and feel is controlled in the DOCStudio template system.

Paragraph Formatting

Line Break

```
<br>
```

Note that the DOCStudio system will automatically insert HTML linebreaks if the checkbox is checked above the Page Body box.

Start New Paragraph

```
<p>
```

Note that the DOCStudio system will automatically insert HTML linebreaks if the checkbox is checked above the Page Body box.

Indented Paragraph

```
<blockquote>
      Indented Text,
      Text, Text
</blockquote>
```

Line

```
<hr>
```

It's a good idea to avoid these; they usually don't look very good and they force the reader's eye to jump over a hurdle.

Bulleted List

```
<ul>
      <li>Text
      <li>Text
      … etc, with an <li> for each bullet
</ul>
```

Note: if you want a numbered list, use `<ol>` and `</ol>` instead of `<ul>`, `</ul>`

Centered Text

```
<center>
      Centered Text
</center>
```

Links

To Link to Another Page in the DOCStudio System

Text that should link
Replace "filename" with the filename of the page you are linking to.

To Link to Another Site or a Page on Another Site

Text that should link
Replace "siteURL" with the complete URL of the page you are linking to. You can get this by going to the page you want to link to and copy the URL from the location bar at the top of your browser.

Rules to Keep in Mind

Every text formatting tag has an opening tag () and a closing tag (). If you don't use the closing tag, all the following text will be formatted to the end of the document.

You can combine multiple formatting tags. However, be sure to balance the tags from inside-out; for instance:

<i>Text here</i> is correct because the tags are wrapped around the text like gift wrap: the inner wrapping is italic, the outer wrapping is bold.
<i>Text here</i> is **not** correct because the outside wrapper ends before the inside wrapper does. Think of a box you are gift wrapping and then wrapping with brown shipping paper.

If you want to format a link with bold, color, or another text format, put the link tag **outside** the text formatting; for instance:

Text here.

Appendix B: DOCStudio Plugin API

DOCStudio has built in handling for PERL CGI scripts, so you can incorporate complex form handling and other services into your site very easily. This provides a huge benefit of relieving the CGI script of any templating work and also makes the script more reusable.

Instructions for the PERL programmer who is writing your script are below:

Writing The Plugin

Write the plugin as you would a perl sub-routine (i.e. no perl headers, etc.). It will be called using “require”.

End the file with $done=1;

The file must have the extension “.pl” and reside in /cgi-bin/docs_perl/

Your plugin will have full access to all searchargs (submitted in the query string), postargs (submitted via post) and cookies using the built-in associative arrays:

```
$searcharg{name}
$postarg{name}
$cookie{name}
```

…where “name” is the name of the name/value pair.

Returning Results to a DOCStudio Page (recommended)

Ideally, your plugin should send a page back to the user that is in the DOCStudio system. This enables the site’s owner to move or edit the page without disturbing your functionality; additionally, targeted advertising, contextual navigation and pathing are handled automatically.

To build your results page, just create and save it as you would any other page in DOCStudio.

To insert dynamic content into the results page (such as an order total), have your plugin store those elements in an associative array named %results. Where you need to insert the dynamic content into the body of the DOCStudio page, use the tag:

```
<!--results name-->
```

…where “name” is the name of the result value you wish to insert.

For instance, to insert an order total, the plugin should assign the total to %results as follows:

```
$results{order_total} = $x + $y + $z;
```

In the HTML of the DOCStudio page for the results, insert the following tag to display the total:

```
Your total is:  $ <!--results order_total-->
```

You may also insert values from the built-in %searcharg, %postarg and %cookie arrays:

```
<!--searcharg name-->
<!--postarg name-->
<!--cookie name-->
```

…where “name” is the name of the array’s name/value pair.

Or, you may use the <@$variable> tag (see next section).

Using <@$variable>

You may display any variable on a DOCStudio page using the tag:

```
<@$variable>
```

This tag works for all types of variables, e.g. $variable, $array[index], $associative{key}.

Setting cookies

If you need to set one or more cookies, assign them to the variable $plugin_cookies. For example:

```
$plugin_cookies = “\nSet-Cookie: checkout_status=complete; Path=/;”
```

Results page @if functionality

To process if/else evaluations on a DOCStudio page, use the following code:

```
<@if (conditional statement)>
      text or HTML here
```

```
<@else>
        text or HTML here
<@/if>
```

Replace “(conditional statement)” with the statement you want evaluated. For best results, always include an ‘else’, even if it is blank.

For example:

```
<@if ($cookie{realm} > 1 || $server_name =~ /staging/i)>
        text or HTML here
<@else>
        text or HTML here
<@/if>
```

Note that you cannot use parentheses within the conditional statement.

Results page @eval functionality

To assign variables or perform other functions, use the following code:

```
<@eval (perl statement)>
```

Replace “(perl statement)” with the code you want executed via perl’s “eval” function.

For example:

```
<@eval ($variable = $variable + 1)>
```

This feature is especially useful during loops so that new columns may be started once a particular row number is reached.

Results page @loop functionality

Your results page may also use the built in DOCStudio loop functionality. To loop through an array (such as the results from a database query) on your results page, use the following code:

```
<@loop "array_name">
        Row number <@rownum>
        Column 1: <@col 1>      Column 2: <@col 2>    … etc.
<@/loop>
```

Replace “array_name” with the name of the array that contains the arrays with the rows. For example, to select some data from a database table and then loop through that data on the results page, you would use the following code in the plugin:

```
$sql = "SELECT * FROM MY_TABLE";
$db->Sql($sql);
$count = 0;
while ($db->FetchRow()) {
        $this_row_array_name = “rowarray” . $count;
        push (@db_results, $this_row_array_name);
        @$this_row_array_name = $db>Data(“FIRST_NAME”, “LAST_NAME”);
        $count++;
        }
```

*Note that while we are looping through all the rows that are returned by the query, we are creating an array for each row and pushing the **name** of that array into a different array called “db_results”.*

To loop through the data on the results page, you would use the following code:

```
<@loop "db_results">
        First Name: <@col 1>      Last Name: <@col 2>
        <br>
<@/loop>
```

Note that column and row numbers start with one, not zero. You may use the tag <@rownum> to display the current iteration number of the loop. You may also use If/Else logic within your loop. To evaluate the row number, use the variable $rownum; to evaluate the column number, use $col[#]. For example:

```
<@loop "db_results">
<@if ($col[1] ne "")>
        First Name: <@col 1>
<@/if>
<@/loop>
```

Note that <@rownum> and <@col> values are inserted before <@if> statements are evaluated, so if you are comparing a variable to a column’s value (as opposed to the example above which compares a column’s value to a fixed value), use:

```
<@if ($my_variable eq "<@col 1>")>
```

It is also important to know that <@loop>s are evaluated separately from the rest of the page, so any variables set or altered with <@eval> will only be useful within the loop.

If you need to determine where you are in the loop (to start a new table <td>, for example), you may use these built-in variables:

```
$total_rows
$half_of_total_rows
$third_of_total_rows
$quarter_of_total_rows
```

For example:

```
<@if ($rownum == $half_of_total_rows)>
       </td><td width="50%">
<@/if>
```

Results page @innerloop functionality

DOCStudio supports one level of nested loop. To perform a loop within a <@loop>, use the following code:

```
<@loop "array_name">
       Row number <@rownum>
       Column 1: <@col 1>      Column 2: <@col 2>    … etc.
       <@innerloop "inner_array_name">
              Row number <@rownum>
              Column 1: <@col 1>     … etc.
       <@/innerloop>
<@/loop>
```

The <@innerloop> functionality supports the same tags as <@loop> (e.g. <@rownum>, <@col>, etc.). However, you may not loop inside an <@innerloop>. Only one level of loop nesting is possible.

Ending a loop with @break

To end a loop before it has completed, use <@break>. For example:

```
<@if ($rownum == 10)>
       <@break>
<@/if>
```

Pre-built drop-down <select> menus

DOCStudio provides several ready to use drop-down menus. To include a pre-built drop-down in a form, use the following code:

```
<!--insert dropdown type="x" name="x" style="x" onChange="x"-->
```

Replace each "x" with the appropriate text. The **type** parameter tells DOCStudio what type of drop-down to build. See the list below for valid types. The **name** parameter is whatever you are naming the <select>. Note that if your plugin is loading values into the %results array, the correct <option> will be selected, e.g. if ($results{state} eq NY) the NY <option> will be selected. **Style** and **onChange** are optional; delete those parameters if you are not using them; otherwise, code them exactly as you would if they were in a normal <select> tag.

Pre-built drop-down types:

State: type="state". Includes all U.S. states and Canadian provinces.

Country: type="country". Includes all world countries.

Credit Card Types: type="cc_type". MasterCard, Visa and American Express.

Months: type="cc_month". The 12 months.

Days: type="days". 1 – 31.

Credit Card Exp. Years: type="cc_year". The current year plus the next 11.

Calling The Plugin (DOCStudio Results Page)

To send a form's data to your plugin, use this action URL:

<form action=/results_page&plugin=plugin_name method=post>

Replace "results_page" with the filename of the DOCStudio page you are using for your results (do not include the .htm extension). Replace "plugin_name" with the name of your plugin's perl script (do not include the .pl extension).

Returning Non-DOCStudio Results

If you need to send back results that do not rely on an existing HTML page, write your HTML to an array named @results. Do not include <head> or <body> tags, or any navigation, as these are handled by the DOCStudio templating system. Your HTML should just be the main content area.

Assign the variable $pathing_name to the name you want to call your results page. For instance, “Order Confirmation”. This value is displayed in the template’s ‘you are here’ pathing.

Calling the Plugin (Non-DOCStudio Results Page)

To send a form’s data to your plugin, use this action URL:

<form action=/cgi-bin/docs?plugin=plugin_name&section=ID# method=post>

Replace “plugin_name” with the name of your plugin’s perl script (do not include the .pl extension). Replace “#” with the ID number of the section you want your results page displayed in. (Because you are bypassing the DOCStudio page system to display your results, DOCStudio need to know ‘where you are’ for contextual navigation and targeted advertising. You can find the section ID number by clicking “Edit this Section” on any page in the section you want your results to be displayed in; the number is displayed in the URL in the location bar of your browser.

Sample Plugin

Plugin PERL Script

Note that there are no headers; it is coded like a subroutine. This is the complete script – easy, huh? Note that it uses the DOCStudio built-in %postarg array to call name/value pairs submitted in the form.

```
# plugin filename: nl_subscribe.pl
# plugin location: /cgi-bin/docs_perl/nl_subscribe.pl

chop ($fulldate = `/bin/date`);
$form_submit_email = “webmaster\@myco.com”;

if ($postarg{todo} eq “unsubscribe”) {
       $subject = “Unsubscribe Me”;
       $heading=“Removal Request”;
       } else {
       $subject = “I Want To Subscribe”;
       $heading=“Request for Newsletter Subscription”;
       }

# email the request to the MyCo.com Webmaster
open (EMAIL, “| mail -s \”$subject\” $form_submit_email”);
```

```
print EMAIL “$heading\n=========================\n\n” .
$postarg{address} . “\n\nSubmitted ” . $fulldate . “\n”;
close (EMAIL);

$done = 1;
```

Form That Calls the Plugin

Note that the form action calls the DOCStudio results page after the “?” and assigns the plugin filename to the value “plugin”.

```
<form action=/cgi-bin/docs?nl_sub_confirm&plugin=nl_subscribe
method=post>
       <input type=text size=30 name=address>
       <input type=submit value=Subscribe>
       <input type=hidden name=todo value=subscribe>
</form>
```

Results Page

This page is a normal DOCStudio page, created using DOCStudio Admin “Create New Page” functionality. The filename for this page is “nl_sub_confirm” – the value that is called immediately after the “?” in the form’s action. Note how DOCStudio uses the built-in %postarg array to insert the value for “address” as submitted in the form.

```
<h1>Subscription Confirmation</h1>
Thanks for subscribing to the newsletter. It will be sent to the address
<b><!--postarg address--></b> and you should receive your first issue in
just a few weeks.
```

Appendix C: DOCStudio Portal Functionality

If your site uses DOCStudio Portal functionality, you can create and manage links to other sites as follows:

Creating a New Page of Links

Go to the section you want the page to be in and click the drop-down to "Create New Page in this Section" (or create a new section). Usually, you want portal links to appear on the main page of the section. Create the new page (or section main page) as described in the "Managing Content: Pages" area of this manual, but be sure to select either **Page Index**, **Page Index w/ Abstracts** or **Page Index w/ Abstracts & Details** from the "Dynamic Elements" drop down menu.

The Page Index or Abstract Index will automatically display the portal links as you add them. For more information about Page and Abstract Indexes, see the "Managing Content: Pages" area of this manual.

Adding Portal Links

To add a link to your portal page, go to the page you want the link to appear on (make sure it is a page with a Page Index or Abstract Index Dynamic Element). Click the "New Portal Link Here" drop-down at the bottom of the window.

On the Create New Portal Link page, fill in each field as follows:

> **Section:** Select the section you want the link to be a part of (the section you were in will be pre-selected). Note that if you choose a different section from the drop-down, the page will reload.
>
> **Sort Order:** Choose where the link will appear in Page Index Lists (see the "Dynamic Elements" information in "Managing Content: Pages"). Check the "Flag as new" checkbox if you want a "New!" graphic displayed next to the page title in Page Index Lists for two weeks.
>
> **Link Title:** Enter a title for the link.
>
> **Link URL:** Enter the URL for the site or page you want to link to.
>
> **Description of Link:** Enter one or two sentences that describe the site you are linking to. The description appears on the search results page when a visitor uses the search feature on your site and in Abstract Indexes.
>
> **Keywords:** Enter a few keywords that describe the site you are linking to, separated by commas. Usually 6-12 is a good number. Check the "Include link in

searches" checkbox if you want the link to be included when a visitor uses the search feature on your site.

Source: If your site is configured to show expanded details for portal links, you may enter a source for the link. For example, "Adobe.com". This is useful if you are linking to a file, such as a PDF, on another site.

File Size: If your site is configured to show expanded details for portal links, you may enter a file size for the link. For example, "1.2MB". This is useful if you are linking to a file on another site.

Type: If your site is configured to show expanded details for portal links, you may enter a type for the link. For example, "PDF". This is useful if you are linking to a file on another site.

Author: If your site is configured to show expanded details for portal links, you may enter an author for the page or file you are linking to.

Published: If your site is configured to show expanded details for portal links, you may enter a date for the link. For example, "12/12/2003".

Access Level: Select "Available to all" or "Only Members". If you select Only Members, visitors will have to have a user account and be logged in to access the link. For more information, see the "Managing Users" section.

Object Name: The object name is used to manage the link, similar to the filename you assign when you create a new page. This field will automatically fill in based on the Link Title you typed. It is usually a good idea to accept the automatic value. If you choose to type your own object name, do not use any spaces or unusual characters, and do not include an extension (i.e. ".htm").

Auto-Expire: If your site is configured to support auto-expire and you want the link to be automatically deleted on a certain day, check the checkbox and select a month, day and year.

Click "Save Link" to save the link and make it appear in Page or Abstract Indexes.

Editing Portal Links

When you are on a page that includes portal links, you will see the names of each link in the "Edit…" drop-down menu at the bottom of the page. To edit a link, select it from the drop-down menu.

Once you select a link to edit, you will be presented with the Edit Portal Link page. This page contains all the fields you filled out when you created the link. You may edit any or all of these fields. When you have made all the changes you desire. Click "Save Changes".

To delete the link, click "Delete This Link".

Portal Options

Outside sites you are linking to via DOCStudio Portal functionality may appear in one of three different ways:

Same Window: The site loads in the same window, taking the user completely out of your site.

New Window: Opens a new window which loads the site. Your site remains open in the original window.

The New Window method is recommended and is the default. If you require a different method, contact your DOCStudio technician.

Adding File Links

To add a link to a downloadable file, such as a PDF, to your portal page, go to the page you want the link to appear on (make sure it is a page with a Page Index or Abstract Index Dynamic Element). Click the “New File Link Here” drop-down at the bottom of the window.

On the Create New File Link page, fill in each field as follows:

Section: Select the section you want the file to be a part of (the section you were in will be pre-selected). Note that if you choose a different section from the drop-down, the page will reload.

Sort Order: Choose where the link to the file will appear in Page Index Lists (see the “Dynamic Elements” information in “Managing Content: Pages”). Check the “Flag as new” checkbox if you want a “New!” graphic displayed next to the page title in Page Index Lists for two weeks.

File Title: Enter a title for the file. This title will be displayed in links to the file.

Description of File: Enter one or two sentences that describe the file. The description appears on the search results page when a visitor uses the search feature on your site and in Abstract Indexes.

Keywords: Enter a few keywords that describe the file, separated by commas. Usually 6-12 is a good number. Check the “Include link in searches” checkbox if you want the file to be included when a visitor uses the search feature on your site.

Source: If your site is configured to show expanded details for portal links, you may enter a source for the file. For example, “U.S. Census Bureau”.

Author: If your site is configured to show expanded details for portal links, you may enter an author for the file you are uploading.

Published: If your site is configured to show expanded details for portal links, you may enter a date for the file. For example, “12/12/2003”.

Access Level: Select “Available to all” or “Only Members”. If you select Only Members, visitors will have to have a user account and be logged in to access the link. For more information, see the “Managing Users” section.

Object Name: The object name is used to manage the link, similar to the filename you assign when you create a new page. This field will automatically fill in based on the File Title you typed. It is usually a good idea to accept the automatic value. If you choose to type your own object name, do not use any spaces or unusual characters, and do not include an extension (i.e. “.htm”).

File: Click the button to find the file you wish to upload on your hard drive. Once you have found it and the dialog box goes away, you should see the name of the file displayed.

Auto-Expire: If your site is configured to support auto-expire and you want the file to be automatically deleted on a certain day, check the checkbox and select a month, day and year.

Click “Upload File” to upload the file and make it appear in Page or Abstract Indexes.

Editing File Links

When you are on a page that includes portal links, you will see the names of each link in the “Edit…” drop-down menu at the bottom of the page. To edit a link, select it from the drop-down menu.

Once you select a file to edit, you will be presented with the Edit File Link page. This page contains all the fields you filled out when you uploaded the file. You may edit any or all of these fields. When you have made all the changes you desire. Click “Save Changes”.

To delete the file, click “Delete This File”.

Appendix D: DOCStudio Mailing List Manager

If your site uses DOCStudio Mailing List Manager (MLM), you can easily manage a list of email subscribers as follows:

Subscribe Page

The subscribe page contains the subscribe form. It may be edited like any other DOCStudio page, but do not adjust the form fields.

When a user enters a valid email address and clicks “Subscribe”, the user’s email address is added to the list stored in the DOCStudio MLM. A notification email is also sent to the default administrator informing him or her that someone has subscribed. No action is required by the administrator – this is just a notification.

Subscribe Confirmation Page

This is the page the user sees after her address has been added to the list. It may be edited like any other DOCStudio page, but do not adjust the plugin fields (<!—results --> or <!—postarg -->).

Unsubscribe Page

When a user enters a valid email address and clicks “Unsubscribe”, the user’s email address is removed from the list stored in the DOCStudio MLM. A notification email is also sent to the default administrator informing him or her that someone has unsubscribed No action is required by the administrator – this is just a notification.

Important Note: A link to “unsubscribe” should be included at the bottom of every email newsletter sent out. For example,
To be removed from our mailing list, click the link below:
http://www.yoursite.com/unsubscribe

Unsubscribe Confirmation Page

This is the page the user sees after her address has been removed from the list. It may be edited like any other DOCStudio page, but do not adjust the plugin fields (<!—results --> or <!—postarg -->).

Unsubscribe Error

This is the page the user sees when he/she tries to unsubscribe an address that is not on the list. It may be edited like any other DOCStudio page, but do not adjust the plugin fields (<!—results --> or <!—postarg -->).

If the user enters an address other than the one she subscribed with, she will get this error page. The user must enter the exact address she entered when she subscribed. Many users don't bother to check what address they are receiving the newsletter at and just enter the first address that comes to mind. This page will help to insure that they unsubscribe the correct address.

Administrator Page

This page is located at www.yoursite.com/emails.

You must login to DOCStudio admin to access the MLM Administration Page. Once you are logged in, you will see the list of subscribers, arranged alphabetically. You can copy and paste this list as you would any other text from a webpage.

If you have multiple subscriber lists, a drop-down menu at the top of the page will allow you to select the list you want to manage.

At the bottom of the page are fields to add and remove addresses. This is a convenient place to manually subscribe or unsubscribe users. To change a user's address, remove the old address, then add the new one.

Appendix E: DOCStudio Weblog (Blog)

Adding a weblog to your site can dramatically boost your placement in search engines. Frequently adding new content to your site is the best way to get search engines to index your pages on a regular basis. A weblog makes it easy to add new, informal content quickly and regularly.

If your site uses the DOCStudio Weblog (Blog) you can easily add, edit and remove entries to your online journal as follows:

Main Weblog Page

The main page of your Weblog shows the most recent entries, in order of the date they were entered. The number of entries displayed on the page is controlled in the configuration settings for your site. If you wish to change the number of entries displayed per page, contact your DOCStudio technician.

At the bottom of each page are links to navigate to the next or previous page of entries if applicable.

Each Weblog entry consists of a Title, the Entry and a Timestamp. The appearance of each of these elements may be customized by your DOCStudio technician.

Adding a New Entry

To add a Weblog entry, first log into the DOCStudio admin area as described earlier in this manual. Once you have successfully logged in, navigate back to the main Weblog page.

As a logged in DOCStudio administrator, you will see links on the Weblog which are not viewable by the general public, including “Click here to create a new entry” and “Edit this entry”. If you do not see these links, make sure you are logged in as an administrator (if you don’t see drop-downs at the bottom of each page on your site, you are not logged in) and try reloading the page.

To add a new Weblog entry, click the link near the top of the main Weblog page that says “Click here to create a new entry”. A new page will load with a simple form. First, enter a title for your entry in the top field. Next, type the entry in the large box. You may use HTML to format your entry if you wish. You may also incorporate a photo by generating an image tag: just click the “Add Image” link. (Instructions for using the image tag creator can be found elsewhere in this manual.)

When you have completed the form, click “Submit”. Your entry will be added to the Weblog and you will be returned to the main Weblog page.

Note: for better ranking in search engines, keep your entries short – 2-4 paragraphs.

Editing an Entry

As long as you are logged in as a DOCStudio administrator, you will see a link to “Edit this entry” at the bottom of every Weblog entry. Click this link to edit the desired entry. You will be presented with the form that was filled out when the entry was created. You may edit both the Title and Entry fields. When you have made the edits you desire, click “Save Changes”. The edits will be saved and you will be returned to the main Weblog page.

Deleting an Entry

To delete an entry, simply click the “Edit this entry” link at the bottom of the entry you wish to delete. On the resulting form, click the button to “Delete This Entry”. You will be asked to confirm that you want to delete the entry. Once you have done so, the entry will be deleted and you will be returned to the main Weblog page.

Weblog Archives

An index of Weblog entries is automatically created. Entries may be sorted either by month or week. The default is by month; contact your DOCStudio technician if you need to archive by week. The link to the Archives page is located at the top of the main Weblog page, and may also be included in the site navigation if desired.

Weblog Search

By default, the Weblog is searched when a user performs a site search. Weblog entries the match the keywords the user searched for are listed below page matches. If desired, an independent search form may be added which only searches the Weblog. Site search may also be set to not include Weblog entries if desired.

The search functionality searches both the title and the entry itself of each Weblog entry. When the results are displayed, only the first 20 words of the entry are displayed and any HTML formatting is removed.

Appendix F: DOCStudio Markup Language (DOCSML)

DOCStudio supports a robust markup language you may use on your pages to incorporate dynamic elements such as variables. You may also make pages contextual through use of if/else statements.

General Variables

`<!--image path-->`	complete url preceding the image filename e.g. http://www.mydomain.com/images/
`<!--searcharg file-->`	filename of the current page
`<!--docstudio page_modified_date-->`	date entered in the Last Edited field
`<!--docstudio copyright_year-->`	current year
`<!--docstudio path_to_filename-->`	the complete url preceding the filename e.g. http://www.mydomain.com/
`<!--color #-->`	replace # with the number of the color you want from the current section's color palette
`<!--docstudio targeted_element_#-->`	replace # with the number for the targeted position you are creating
`<!--results catchall_email-->`	the default contact email address
`<!--results this_section_display_name-->`	name of the section the page is in
`<@spacer WxH>`	inserts a spacer gif; replace W with width, H with height

Postargs

Any value passed from a field in a form using the POST method may be displayed on the resulting DOCStudio page with `<!--postarg name-->` (replace "name" with the name of the field). For instance, to display the value entered in the field `<input type=text size=30 name=address>`, use `<!--postarg address-->`.

Searchargs

Any value passed in the query string may be displayed on a DOCStudio page with `<!--searcharg name-->` (replace "name" with the name of the query string pair). For instance, to display the value for the "function" pair in the url `http://www.mydomain.com/resultspage&function=update`, use `<!--searcharg update-->`.

Note: the first value in every DOCStudio query string is the filename for the page being viewed. In the example above, the value for `<!--searcharg file-->` is "resultspage". DOCStudio hides the first portion of the query sting to make your site's url's cleaner and more search engine friendly. If DOCStudio displayed the complete query string for the example above, it would appear as `http://www.mydomain.com/cgi-bin/docs.cgi?file=resultspage&function=update`.

Cookies

Any value passed from a cookie on a user's computer may be displayed on a DOCStudio page with `<!--cookie name-->` (replace "name" with the name of the cookie). The standard DOCStudio cookies are:

`<!--cookie username-->`	username of a logged in user
`<!--cookie adminid-->`	username of a logged in admin
`<!--cookie realm-->`	access level of a logged in user (1=member, 2=admin, -2 or null=not logged in)

Pre-built drop-down <select> menus

DOCStudio provides several ready to use drop-down menus. To include a pre-built drop-down in a form, use the following code:

```
<!--insert dropdown type="x" name="x" style="x" onChange="x"-->
```

Replace each "x" with the appropriate text. The **type** parameter tells DOCStudio what type of drop-down to build. See the list below for valid types. The **name** parameter is whatever you are naming the <select>. Note that if your plugin is loading values into the %results array, the correct <option> will be selected, e.g. if ($results{state} eq NY) the NY <option> will be selected. **Style** and **onChange** are optional; delete those parameters if you are not using them; otherwise, code them exactly as you would if they were in a normal <select> tag.

Pre-built drop-down types:

State: type="state". Includes all U.S. states and Canadian provinces.

Country: type="country". Includes all world countries.

Credit Card Types: type="cc_type". MasterCard, Visa and American Express.

Months: type="cc_month". The 12 months.

Days: type="days". 1 – 31.

Credit Card Exp. Years: type="cc_year". The current year plus the next 11.

<@> functionality

DSML supports rich functionality including if/else statements and loops. See Appendix B for instructions.

Appendix G: DOCStudio Feedback Form

If your site is configured to use DOCStudio Feedback Forms you can easily add an unlimited number of information gathering forms to your site. Feedback Forms allow you to collect structured information from visitors to your site, such as contact information or quote assessments. By providing visitors with a form to fill out rather than asking them to “email us”, you will be sure to get the information you need and the visitor will find the process faster and easier.

What the Form Does

Your form can utilize any and all HTML <form> elements including text boxes, checkboxes, radio buttons and drop-down menus. When the visitor clicks “Submit”, DOCStudio collects the information and formats it into a structured email. The email is sent to the default administrator address (configured when your site was set up; to send the information to a different address, see below) and the visitor is sent to a page informing them that the information they entered has been submitted.

Note that the data is not stored anywhere; once the email is sent, the data is purged. If you need long-term storage of data, contact your DOCStudio technician for a custom solution.

First Step: Confirmation Page

The first step to creating your Feedback Form is to create a confirmation page. This is the page the user will be taken to after she clicks “Submit”. The page can be a simple “Thank you. Your information has been submitted and you will be contacted shortly.”

To create the confirmation page, simply create a new page in the section in which the Feedback Form will be placed. Be sure to set the Sort Order to “Do not show links to this page” and uncheck the Include in searches & sitemap checkbox. Remember the filename that you give the page as you will need it later.

Note: the same confirmation page can be used for multiple Feedback Forms; just be sure the copy doesn’t refer to a specific form. In fact, you can forgo the confirmation page altogether if you wish and just return the user to the Feedback Form. A default confirmation message is generated automatically; however a custom confirmation page improves the user experience. If you don’t want the automatic confirmation message to appear, include the hidden field <input type="hidden" name="override_message" value="null">.

Second Step: Feedback Form Page

Create a new page in the section in which you want the Feedback Form. In the Page Body, include your form. It should be a standard HTML form and can include JavaScript code to check for empty entries, etc. (Just be sure to uncheck the Convert blank lines to
 checkbox.)

Form Tag

The form's action must be:

```
<!--docstudio form_action_path-->confirm_page_filename&plugin=feedback
```

Replace "confirm_page_filename" with the filename of the confirmation page you created in step 1 (or the filename of the new page you are now creating if you aren't using a confirmation page). Leave the <!--docstudio form_action_path--> as is; it will be replaced with the correct url automatically.

So, the <form> tag for your Feeback Form might be:

```
<form method="post" action="<!--docstudio form_action_path--
>confirm_page&plugin=feedback">
```

Feedback Type Field

You must include a hidden <input> field that will be the subject and title of the email that is sent to you. The name of this field must be "feedback_type" and the value should be something descriptive that makes sense to you.

So, the <input> tag for your Feedback Type might be:

```
<input type="hidden" name="feedback_type" value="Consultation Request">
```

Input Fields

You can use as many <input> tags as you desire. Each field that the user fills out will be sent to you in the email. Here is how to handle the different types of <input> tags:

> **Text boxes, Select drop-downs, Radio buttons, Hidden fields (anything other than textareas and checkboxes):** You may name the field anything you choose, but only use letters, numbers, underscores and hyphens (no spaces, ampersands, etc.)
>
> ```
> <input type="text" name="City" size="28">
> ```
>
> For each field, the name should be something that makes sense to you and looks nice – it will be a header in the email you receive. For instance, when John Doe types his city into the <input> tag <input type="text" name="City" size="28">, it will be sent to you in the format
>
> **City:** Los Angeles (or whatever John types).

Use underscores (_) for spaces: the tag `<input type="text" name=" Business_Type " size="28">` will be sent to you as

Business Type: Movie Production.

Checkboxes: The name of each <input type="checkbox"> must start with "checkbox_", for instance

```
<input type="checkbox" name="checkbox_M" value="Movie Newsletter">
```

The "checkbox_" tells DOCStudio to add the data to the list of boxes that were checked. The complete list of every box that was checked is sent to you in the email.

For each of the checkbox_ <input> tags in your form, the portion of the name after "checkbox _" doesn't really matter as it is never displayed, but it is important that it be unique – don't name two checkboxes the same.

When John Doe checks the box `<input type="checkbox" name="checkbox_M" value="Movie Newsletter">`, it will be sent to you in the format
Checkboxes:
Movie Newsletter.

Textareas: The name of each <textarea> must start with "textarea_", for instance

```
<textarea name="textarea_Message" cols="30" rows="6"></textarea>
```

The "textarea_" tells DOCStudio to format the data with line breaks; otherwise the text entered would appear as one long string in your email.

For each of the <textarea> tags in your form, the portion of the name after "textarea_" should be something that makes sense to you and looks nice – it will be a header in the email you receive.

When John Doe types a message into `<textarea name="textarea_Message" cols="30" rows="6"></textarea>`, it will be sent to you in the format
Message:
Whatever John typed.

Including line breaks.

Administrator Email Address

By default, when the form is submitted, the information is emailed to the DOCStudio administrator assigned when DOOCStudio was set up for your site. If you wish to send the data for a particular form to a different address, include the following hidden field:

```
<input type="hidden" name="override_admin_email" value="name@company.com">
```

Replace name@company.com with the email address you want the data sent to.

Automatic Links

DOCStudio will automatically create links for <input> fields with the names “Email” and “URL” in the email that is sent to the administrator. So if your form is going to ask for an email address and/or a website URL, use the names “Email” and “URL” for those <input> fields.

Showing Empty Fields

If you want the email the administrator receives to include fields the user left blank, use the hidden <input> field:

```
<input type="hidden" name="show_empty_fields" value="Y">
```

Specifying a Sort Order

If you want the fields to appear in a certain order in the email you will receive, you may define a sort order by using the hidden field "sort_order". The value of this field should be the names of the fields in the order in which you want them sorted, separated with commas. For example:

```
<input type="hidden" name="sort_order"
value="Name,Company,Business_Type,Location,Phone,Email,textarea_Message">
```

Note: Checkbox fields named “checkbox_” are not sorted; they are placed as the last item in the email. If you want a particular checkbox to appear in a certain sort location, do no use the “checkbox_” prefix. ***Important:*** *If you use the “sort_order” hidden field, only those fields you specify will appear in the email you receive, so be sure to include them all (does not apply to “checkbox_” fields).*

Automatic Confirmation Text

By default, DOCStudio displays a confirmation message when the form is submitted, informing the user that the message was sent. If you want your own custom message to display, use the hidden <input> field:

```
<input type="hidden" name="override_message" value="Your Custom Message
Here.">
```

If you do not want any message to appear, set the value of this field to “hide”.

Third Step: Test

Once you have created the confirmation page and form page and saved them in DOCStudio, test your form. Be sure you can access the default administrator’s email account so you can see the email that is sent.

DOCStudio Markup Language (DSML)

If you want to incorporate basic drop-down menus for states or countries, or add other logic to your form, see the Appendix in this manual on DOCStudio Markup Language.

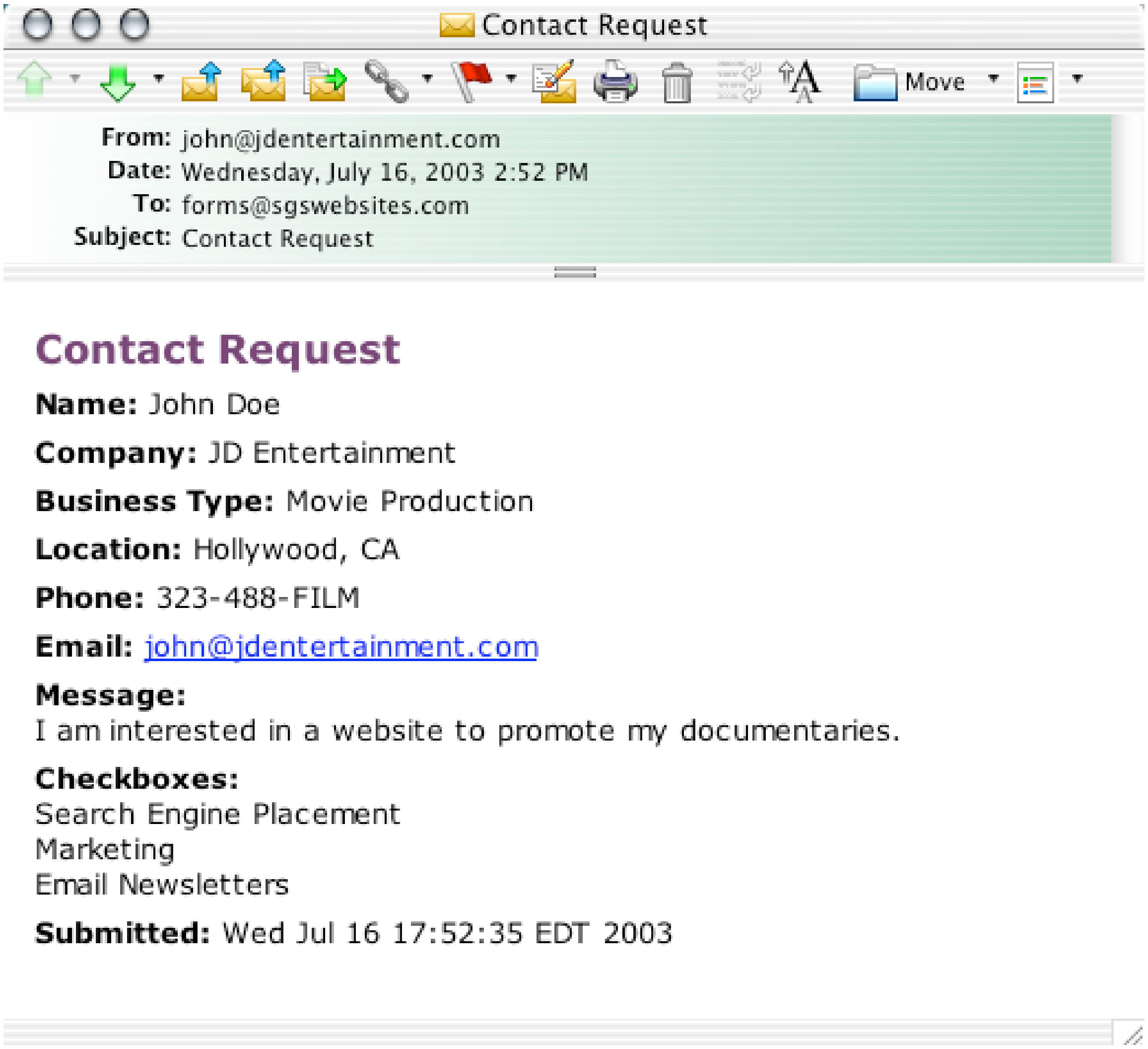
Sample Form and Resulting Email

Form:

```
<form name="form1" method="post" action="/confirm_page&plugin=feedback">
<input type="hidden" name="feedback_type" value="Contact Request">
<input type="hidden" name="sort_order"
value="Name,Company,Business_Type,Location,Phone,Email,textarea_Message">
<input type="hidden" name="show_empty_fields" value="Y">
<table width="100%" border="0" cellspacing="0" cellpadding="5">
<tr>
    <td width="36%" align="right">Your Name</td>
    <td width="64%"><input type="text" name="Name" size="28"> </td>
</tr>
<tr>
    <td width="36%" align="right">Company</td>
    <td width="64%"><input type="text" name="Company" size="28"> </td>
</tr>
<tr>
    <td width="36%" align="right">Type of Business</td>
    <td width="64%"><input type="text" name="Business_Type" size="28"> </td>
</tr>
<tr>
    <td width="36%" align="right">Location</td>
    <td width="64%"><input type="text" name="Location" size="28"> </td>
</tr>
<tr>
    <td width="36%" align="right">Phone Number</td>
    <td width="64%"><input type="text" name="Phone" size="28"> </td>
</tr>
<tr>
    <td width="36%" align="right">Email Address</td>
    <td width="64%"><input type="text" name="Email" size="28"> </td>
</tr>
<tr valign="top">
    <td width="36%" align="right">Message</td>
```

```
    <td width="64%"><textarea name="textarea_Message" cols="30"
rows="6"></textarea></td>
</tr>
<tr valign="top">
    <td width="36%" align="right">Special Needs</td>
    <td width="64%">
    <input type="checkbox" name="checkbox_A" value="Search Engine
Placement">Search Engine Placement
<br>
    <input type="checkbox" name="checkbox_B" value="Marketing">Marketing
<br>
    <input type="checkbox" name="checkbox_C" value="Email Newsletters">Email
Newsletters
    </td>
</tr>
<tr>
    <td width="36%" align="right"> </td>
    <td width="64%"><input type="submit" value="Submit"></td>
</tr>
</table>
</form>
```

Email that is sent to administrator:



Contact Request

Move

From: john@jdentertainment.com
Date: Wednesday, July 16, 2003 2:52 PM
To: forms@sgswebsites.com
Subject: Contact Request

Contact Request

Name: John Doe

Company: JD Entertainment

Business Type: Movie Production

Location: Hollywood, CA

Phone: 323-488-FILM

Email: john@jdentertainment.com

Message:
I am interested in a website to promote my documentaries.

Checkboxes:
Search Engine Placement
Marketing
Email Newsletters

Submitted: Wed Jul 16 17:52:35 EDT 2003