

USER MANUAL

CONTENT MANAGER



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DATE: AUGUST 15th 2003
RELEASE: REVISION 4.3
LANGUAGE: ENGLISH

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Table of Contents

User Manual – Part I	4
0 Structure of the User Manual	4
1 How do I get started with SiteCore?	7
2 Insert text in an HTML-editor	8
3 Content markers	11
4 SiteCore client	14
5 How often do I need to save?	18
User Manual – Part II	19
6 Change between languages	19
7 Insert link	20
8 Insert image	23
9 Inserting new images in the media library	25
10 Create a new document	27
11 Publish for website	29
12 Approve documents	30
13 Shortcuts	32
14 Search	33
User Manual – Part III	34
15 Users in SiteCore	34
16 Assignment of rights	39
17 Administration of the database	42
Glossary	43
A The various menu bars	43
B Explanation to the tree structure	47
C Content of the status bar	48
D Tabs	49
E Content of the tool bar	54
F Item tasks	55
G Language version	56
H Right click menus	57
I Task interfaces	61
J The possibilities of the HTML editor	64

Table of Figures

<i>Figure 1 - SiteCore Content Manager</i>	6
<i>Figure 2 - Website</i>	6
<i>Figure 3 - SiteCore login interface</i>	7
<i>Figure 4 - Internet Explorer version "About" screen</i>	7
<i>Figure 5 - The html editor</i>	8
<i>Figure 6 - Copying text from Word</i>	9
<i>Figure 7 - Illegal word import</i>	10
<i>Figure 8 - Content markers</i>	11
<i>Figure 9 - Content Marker Editor</i>	11
<i>Figure 10 - Other Content Marker Functions</i>	12
<i>Figure 11 - SiteCore client</i>	14
<i>Figure 12 – Opening the html editor</i>	15
<i>Figure 13 - Documents and menu items</i>	16
<i>Figure 14 - Document fields</i>	17
<i>Figure 15 - Changing language for a document</i>	19
<i>Figure 16 - Insert a link</i>	20
<i>Figure 17 - Linking to SiteCore documents</i>	21
<i>Figure 18 - Linking to SiteCore media</i>	21
<i>Figure 19 - Inserting images into documents</i>	23
<i>Figure 20 - Adding new images to the media library - A</i>	25
<i>Figure 21 - Adding new images to the media library - B</i>	26
<i>Figure 22 - Duplicating and Copying documents</i>	27
<i>Figure 23 - Creating new documents</i>	28
<i>Figure 24 - Publishing on the website</i>	29
<i>Figure 25 - Viewing documents for approval</i>	30
<i>Figure 26 - Selecting documents for approval</i>	31
<i>Figure 27 - Inserting favourites</i>	32
<i>Figure 28 - Search function</i>	33
<i>Figure 29 - Add new user - 1</i>	35
<i>Figure 30 - Add new user - 2</i>	36
<i>Figure 31 - Editing user data</i>	37
<i>Figure 32 - Editing User settings</i>	38
<i>Figure 33 - Applying rights to users</i>	40
<i>Figure 34 - Setting Extranet rights</i>	41
<i>Figure 35 - SiteCore client</i>	43

USER MANUAL – PART I

0 Structure of the User Manual

0.1 Hints

0.1.1 Step-by-step instructions

Step-by-step instructions will be indicated by this orange colour.

0.1.2 Important information will be displayed in a blue field

In order to see which version is installed on your computer, click on "help" in the menu bar, select "About Internet Explorer", and the dialogue box below will appear. Here you may see which version is installed. The newest version may be installed directly from www.windowsupdate.com






0.1.3 Good advice will be displayed in green

One of the major advantages of using SiteCore is that you may let many employees work with different sections of your company's website. You may distribute profiles so that each user has access to exactly the sections he/she requires.

0.1.4 Explanation of different fields will be displayed in tables

Where many different fields are to be explained, they will be displayed in tables, at the end of the paragraph as shown here.

Explanation for various fields are listed in tables

	Delete text	Deleting all text in the HTML-editor is done by using the "Clear content" icon. This icon deletes all text in the text field. By using this icon, you ensure that all text and previous formatting are erased.
	Accept	When you are satisfied with the appearance of your text, click on "Accept" and the editor closes. The text is now inserted but not saved, this will only happen when you choose to save.
	Cancel	If you do not wish to keep the inserted text, you select cancel and the HTML-editor will shut down without saving any changes.

In the glossary there are explanations for all icons in the HTML-editor.

0.2 Reading instruction

The User Manual is split up into two sections. Part 1, 2 & 3 (chapters 1 to 19), describe how to use SiteCore and its possibilities. Chapters A to J, are the glossary, where you may find explanations to all menu bars and icons.

This User Manual is intended for different users of SiteCore.

0.2.1 Users that are mainly inserting and editing text

Will typically use SiteCore's content markers, which is the simplest way of using SiteCore.

Covered in chapters 1 to 5, A to J

0.2.2 Users that are publishing/approving

And need more of SiteCore's possibilities, will use the SiteCore Client.

Covered in chapters 1 to 14, A to J

0.2.3 The last category of users is the administrator

This type of user may, in addition to being able to do the same tasks as the other users, also handle database tasks and authorizations, as well as creating new users.

Covered in chapters 1 to 17, A to J

0.3 What is SiteCore?

SiteCore is a program, lying behind a website and controlling all the information of which a website consists. SiteCore cannot be seen by ordinary web users, but only by those controlling the content of the website on a daily basis, i.e. those who are updating the content, publishing news etc.

When you look at a website, it usually consists of a lot of different information in the form of pictures and texts. The information on a website is usually divided into different fields in order to make it logical for the users of the site to find the information they seek.

SiteCore offers an easy access to all of this information contained on the website. You may visually see the construction of the website, and thanks to the program, you have the possibility to add or alter the content in a quick and simple way.

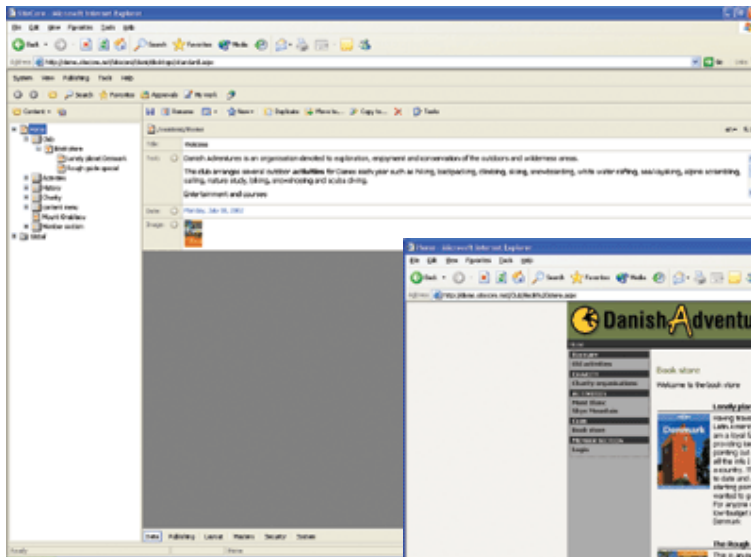


Figure 1 - SiteCore Content Manager

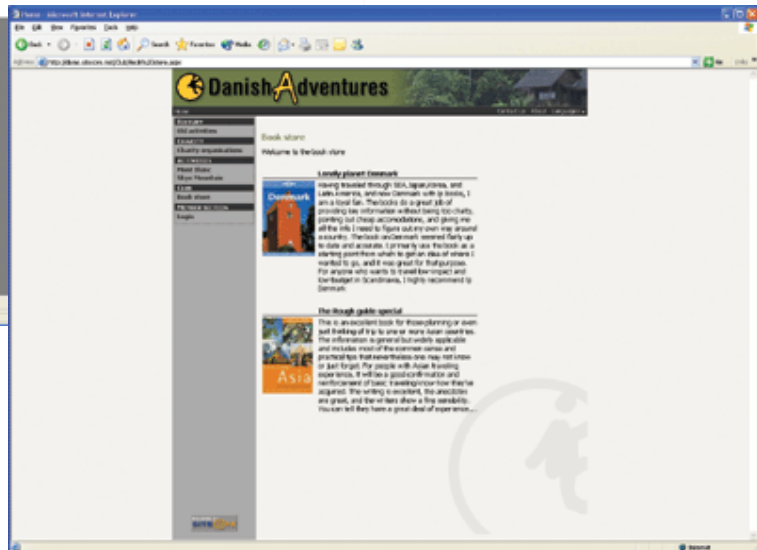


Figure 2 - Website

1 How do I get started with SiteCore?

SiteCore is opened up through Microsoft Internet Explorer 6.0 by opening the site in the same way as with any other website. The different users of the company are given a login, which gives them the authorizations required to do the things that they need in particular.

Step-by-step instruction

1. Start Microsoft Internet Explorer.
2. Enter the distributed URL-address and the login interface will appear
3. Enter your user ID and password, and click on the green arrow, or "Enter"
4. SiteCore is now ready.

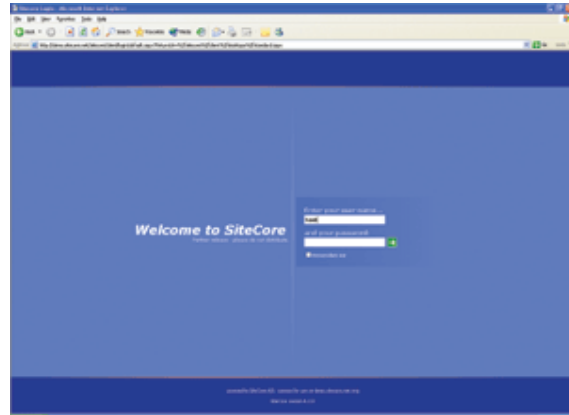


Figure 3 - SiteCore login interface

Distribution of profiles

One of the major advantages of SiteCore is that you may let many employees work with different sections of a company website. You may distribute profiles in order for each user to have access to the functions he/she requires.

Minimum requirement is Explorer version 6.0

In order to see which version you currently have on your computer, click on "help" in the menu bar, select "About Internet Explorer", and the dialogue box below will appear. Here you can see which version is installed. The newest version may be installed directly from www.windowsupdate.com



Figure 4 - Internet Explorer version "About" screen

2 Insert text in an HTML-editor

When you need to insert text on a website, it happens almost in the same way as when you write an ordinary text e.g. in Word. One of the editing tools at your disposal in SiteCore is the HTML-editor. In sections where there are large text areas you will have the possibility of using such an editor.

The HTML-editor is called up by clicking on the blue arrow next to the text field.

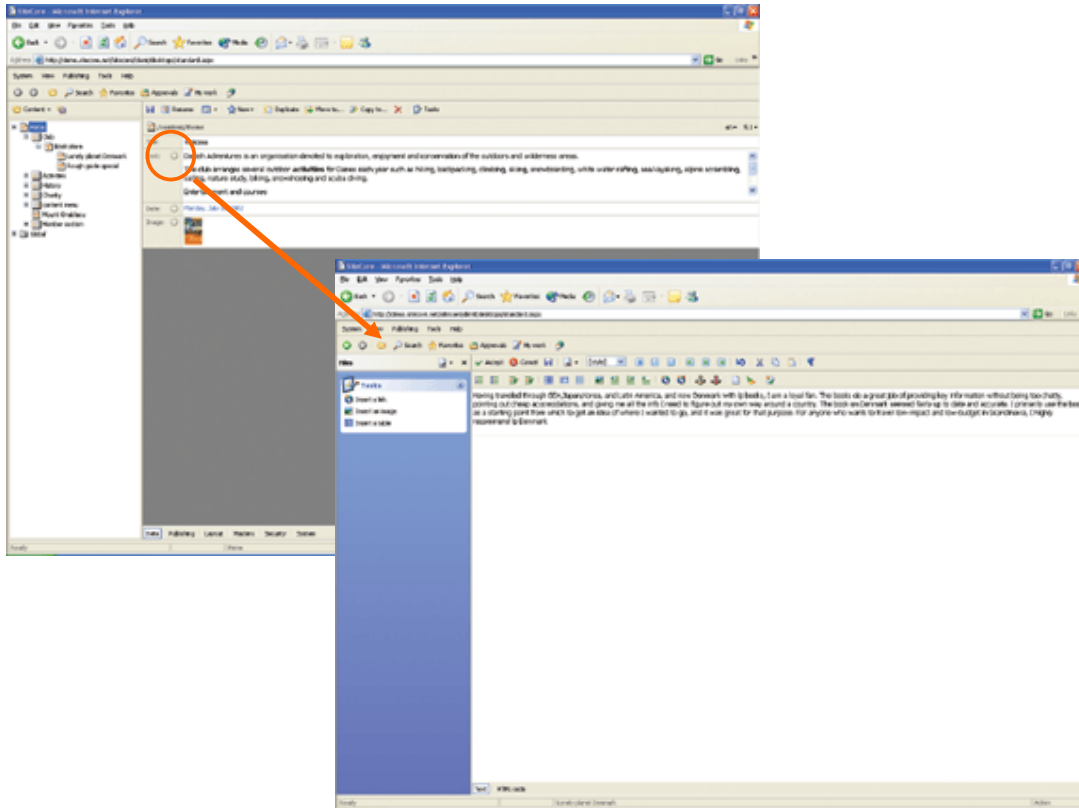


Figure 5 - The html editor

In the HTML-editor you can write your text. You may also use the different formatting possibilities, similar to those you have in Word. You may, for example; insert tables, make bulleted text, and much more.

An HTML-editor behaves slightly differently than an ordinary word processing program, and there are a few extra icons which you need to get used to utilizing. In the last paragraph of the User Manual there are explanations for all icons in the HTML-editor. In the following, the most important ones are explained.

2.1 Copying a text from Word

Step-by-step instruction

1. When copying a text from Word, there are many hidden elements that are copied as well.
2. By using the “Clean HTML” icon in SiteCore, you can remove these unwanted elements
3. A dialogue box opens, where you may either approve or reject the cleaned text.

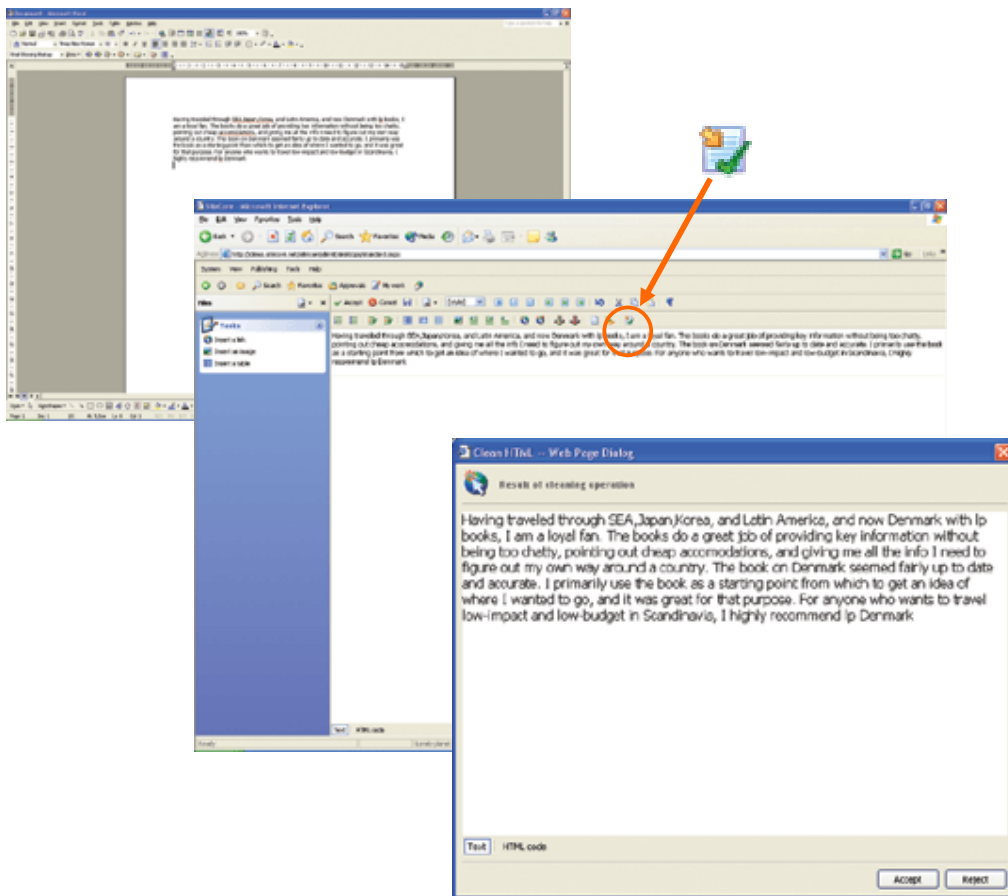





Figure 6 - Copying text from Word

Explanation for the icons in the HTML-editor		
	Delete text	Deleting all text in the HTML-editor is done by using the "Clear content" icon. This icon deletes all text in the text field. By using this icon, you ensure that all text and previous formatting are erased.
	Accept	When you are satisfied with the appearance of your text, click on "Accept", and the editor closes. The text is now inserted but not saved, this will only happen when you choose to save.
	Cancel	If you do not wish to keep the inserted text, you select cancel and the HTML-editor will shut down without saving any changes.

In the glossary there are explanations for all icons in the HTML-editor.

Not everything can be copied directly from Microsoft Word.

Pictures cannot be copied directly. They need to be placed the media library instead (further explanation in the chapter "Insert picture").

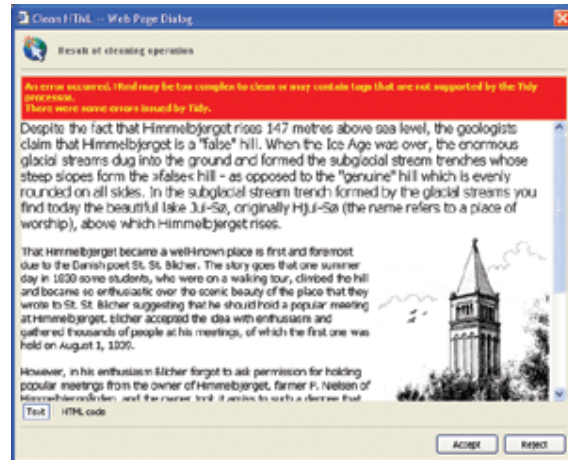


Figure 7 - Illegal word import

3 Content markers

Content markers mean that a text can be inserted and edited through a replica of the website. In this replica there are small dots next to all editable content. By clicking on one of these dots, you may choose if you want to create a new item, or edit the content of the selected document.

On the picture is a website with content markers (the green dots). You may either right or left click on the dots.

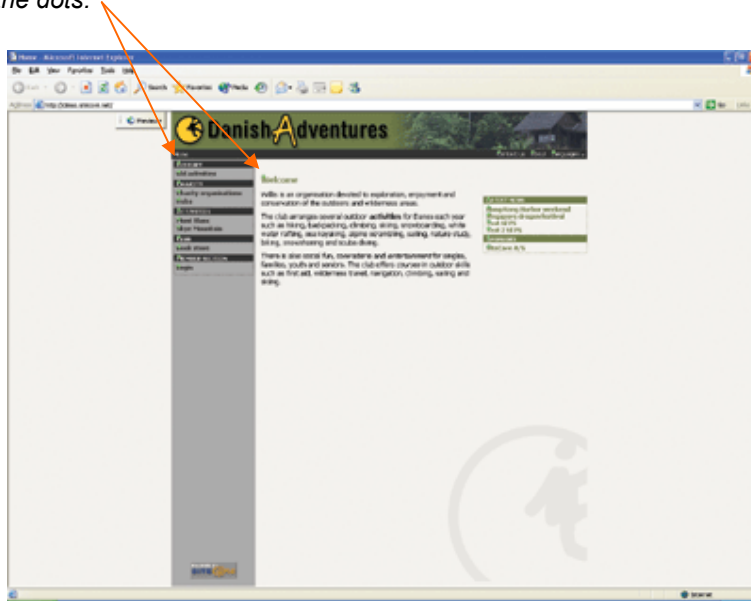


Figure 8 - Content markers

By left clicking, a dialogue box will open, like in the following, where you may insert your text



Figure 9 - Content Marker Editor

By right clicking on the content marker, a pop-up menu will appear from which you may choose to edit the content, delete documents or create new documents.

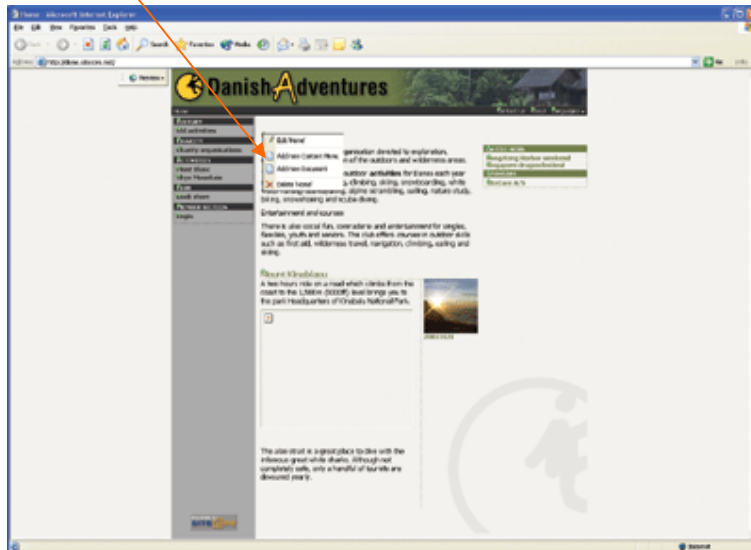


Figure 10 - Other Content Marker Functions

Preview mode (see website with content markers)



Step-by-step instruction

1. When you wish to view your website with content markers, you need to select “Start preview” in the “Publishing” menu on the top menu bar. You may also use the shortcut F7.

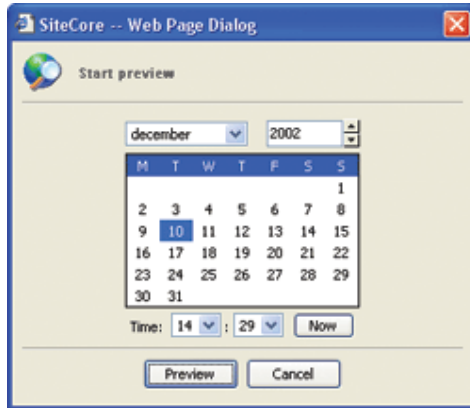
Choice of date

1. You can see how the website looked at any given date and time. You may see it as it looked previously, and you may see changes, which will only be published at a later date.
2. When you have made your selection and clicked on the “Preview” button, a dialogue box will appear, as shown below.
3. After this, a new window will open up with a version of the site, and next to all editable content there are small dots. This is your website shown in preview, which is an editable version

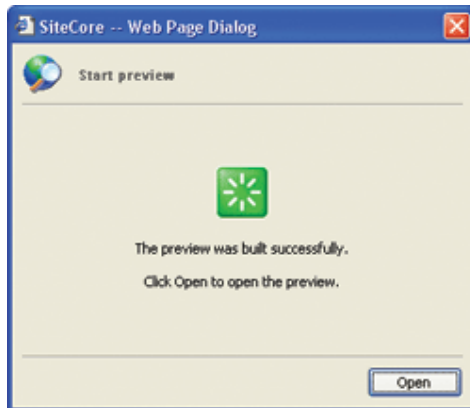
Select “Start preview” and the following dialogue box appears

Publishing	Tools	Help
 Publish		F9
 Start preview		F7
End preview		

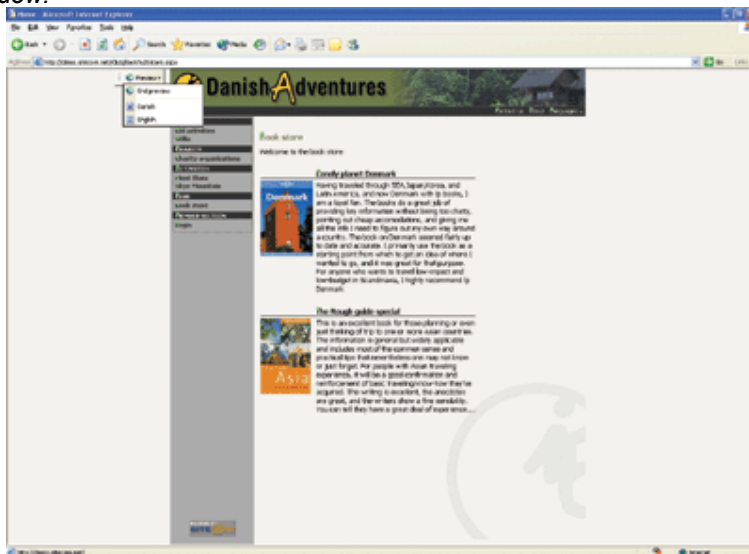
Select a date and click on “Preview”



The preview has been created and may be seen by clicking on “Open”



When you wish to exit the editable version, you select “End preview” and you may close the window.



Starting up directly in Preview

If a user should start up directly in Preview upon logon, this may be defined. More information in the chapter “Create new user”, chapter 15.

4 SiteCore client

The first user interface you see upon login is an overview of the possible interfaces in SiteCore. From this interface, all other interfaces can be accessed.

The most frequently used interface is the Content interface. In the last chapter of the User Manual there is an index covering all the possibilities of the different interfaces.

Content area

The Content interface is the one in which you most frequently work. This is the area where the different documents may be viewed and worked in. You can see the various fields related to the documents and from there insert data.

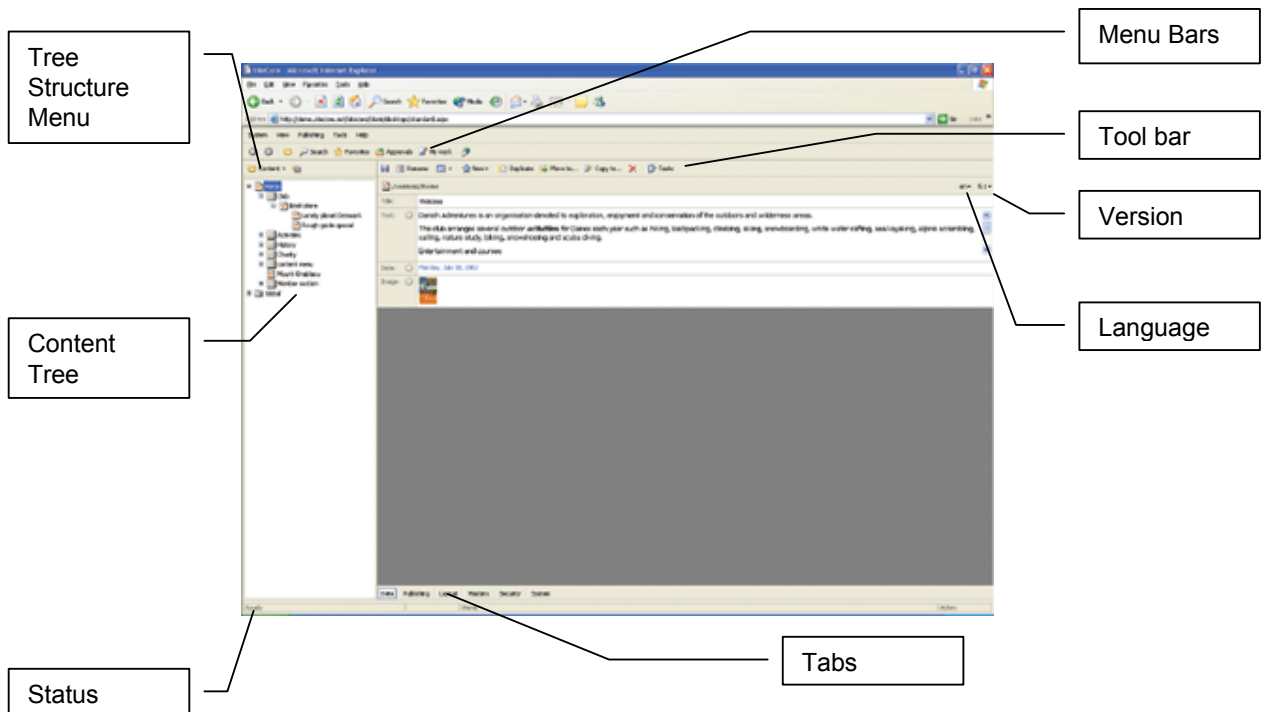
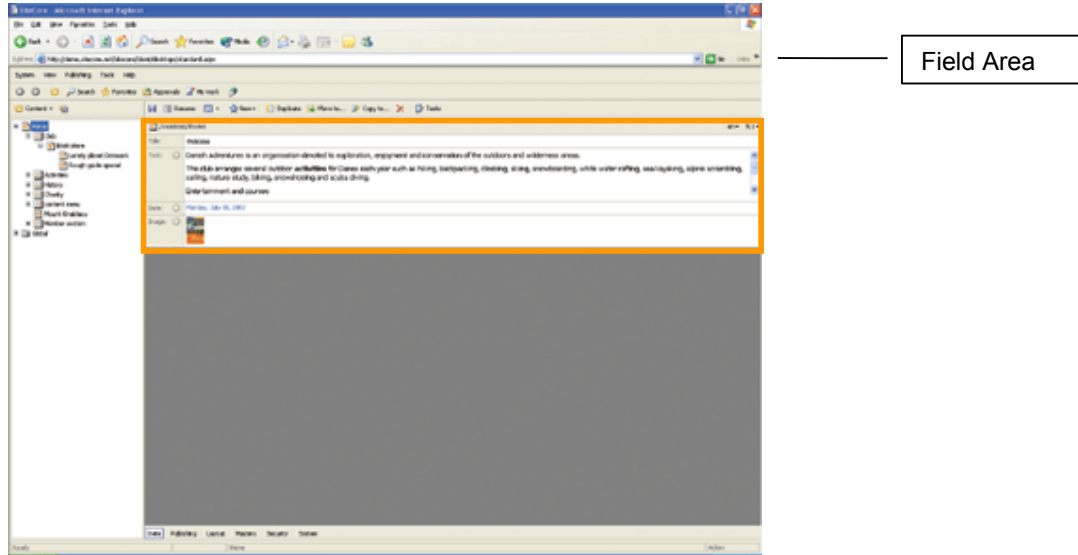


Figure 11 - SiteCore client

The various fields

The different documents are selected by clicking on them in the “Content tree”. The “Content tree” is the tree structure on the left, a little similar to the Explore function in Windows.



Depending on the type of highlighted document, the related areas will be shown in the field.

In a typical document there could be the following fields

- Title field
- Text field
- Picture field
- Date field

The text field is the field where the actual content is written, and there is a separate editor for this field. This editor is an HTML-editor which can be opened by clicking on the arrow next to the field. The HTML-editor is more thoroughly described in the chapter “HTML-editor”.

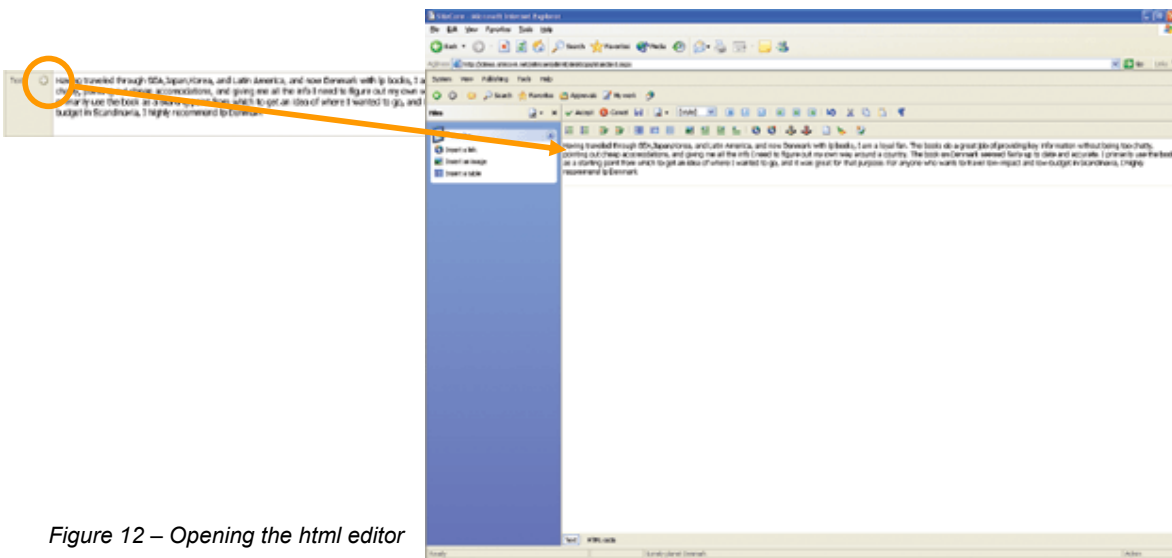


Figure 12 – Opening the html editor

Documents

As shown on the screen dump below, a document may correspond to a bullet on a list on the website itself. If several documents have been inserted in the content tree, these would be shown as bullets on the list. The fields correspond to the different elements that this bullet is composed of. In this case: a title, a text, a picture and a date.

One document is in this case a bullet on the list

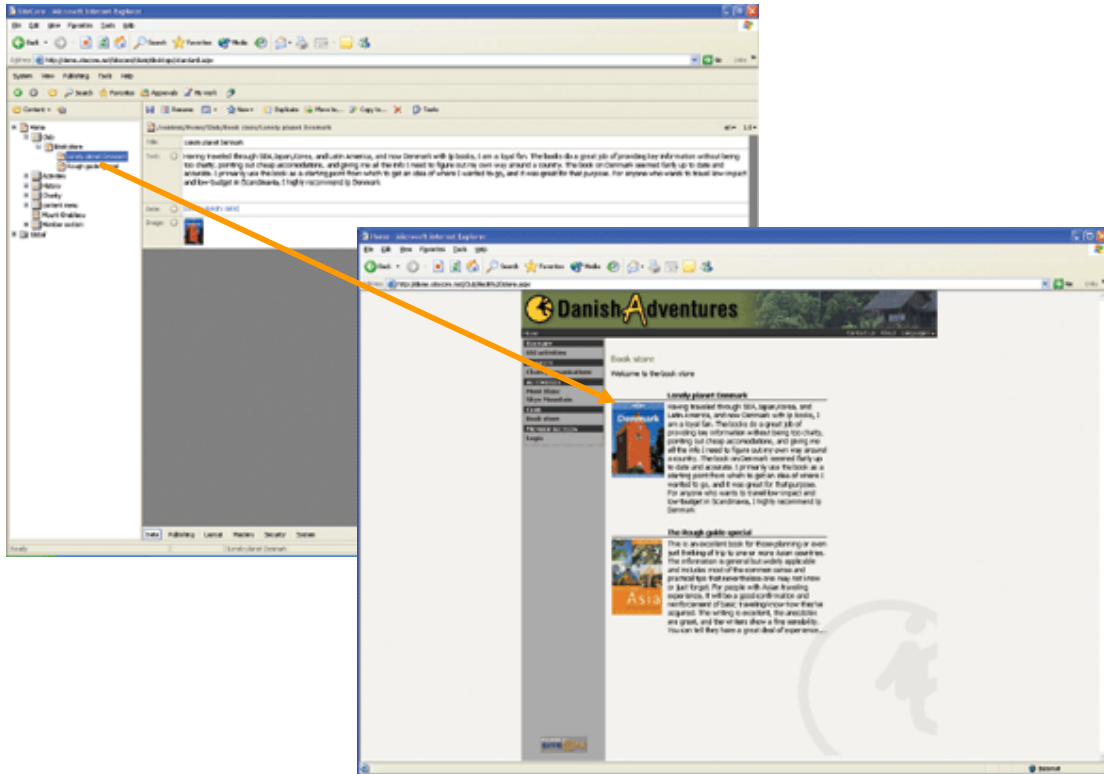


Figure 13 - Documents and menu items

The different fields related to a document.

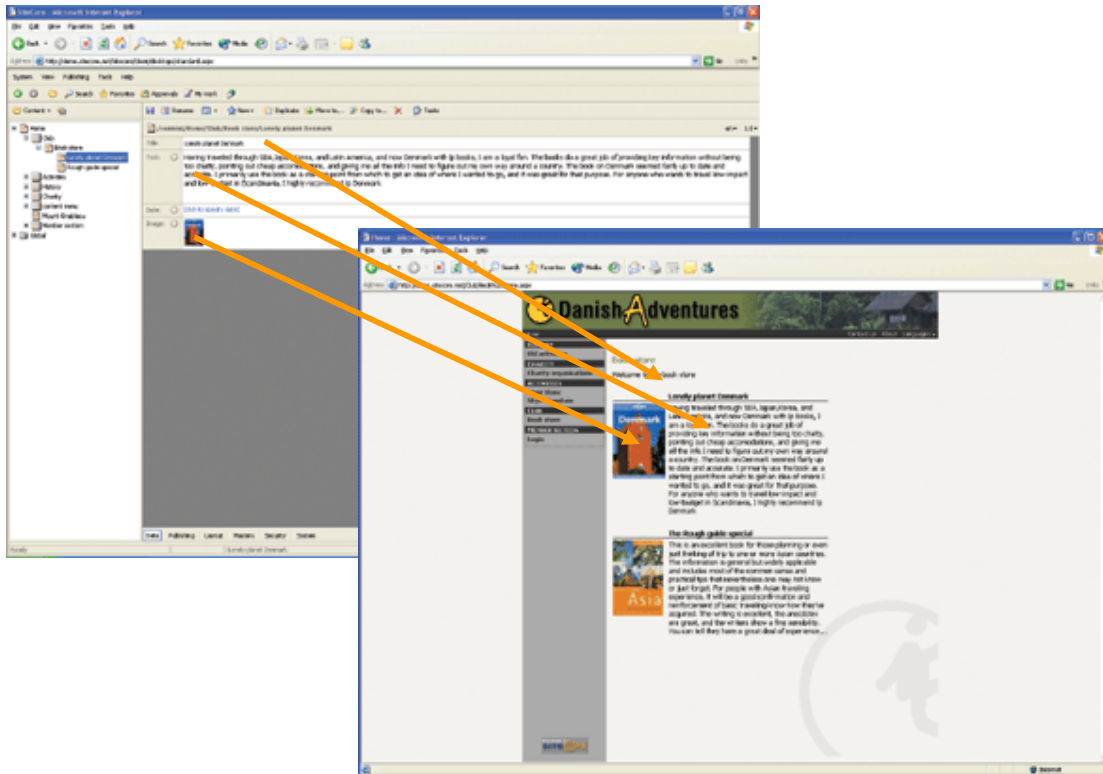


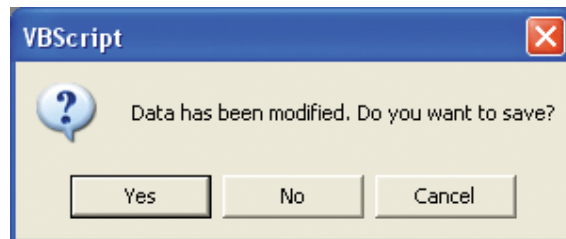
Figure 14 - Document fields

5 How often do I need to save?

The text should be saved regularly as always when working on a computer. In order to save changes in a document, you may click on the “save” icon, or use the shortcut Ctrl+S.



Each time you change to a new document, a dialogue box opens up to ask if the changes in the document should be saved. You may therefore regret the changes by saying no to saving. The modifications take place only in that document.



Modifications are only visible after publishing

When something is inserted or altered in SiteCore, it will not be visible on the website right away. This is why you need not be nervous about making an error, and it showing straight away. The content of the website needs to be published first. You may read more about this subject in the chapter “Publish for website”.

You should always save regularly

You should always save data at least every 15 minutes as you risk being logged off and losing all data that has not been saved. If you have not clicked on anything in SiteCore for some time (usually for 20 minutes) you will be logged off. This means that you need to log on to SiteCore again to continue working. If you have not saved the text you inserted in SiteCore, it would disappear.

USER MANUAL – PART II

6 Change between languages

A company can choose to publish the same website in several languages. If this is the case, the documents exist in several versions depending on the number of languages.

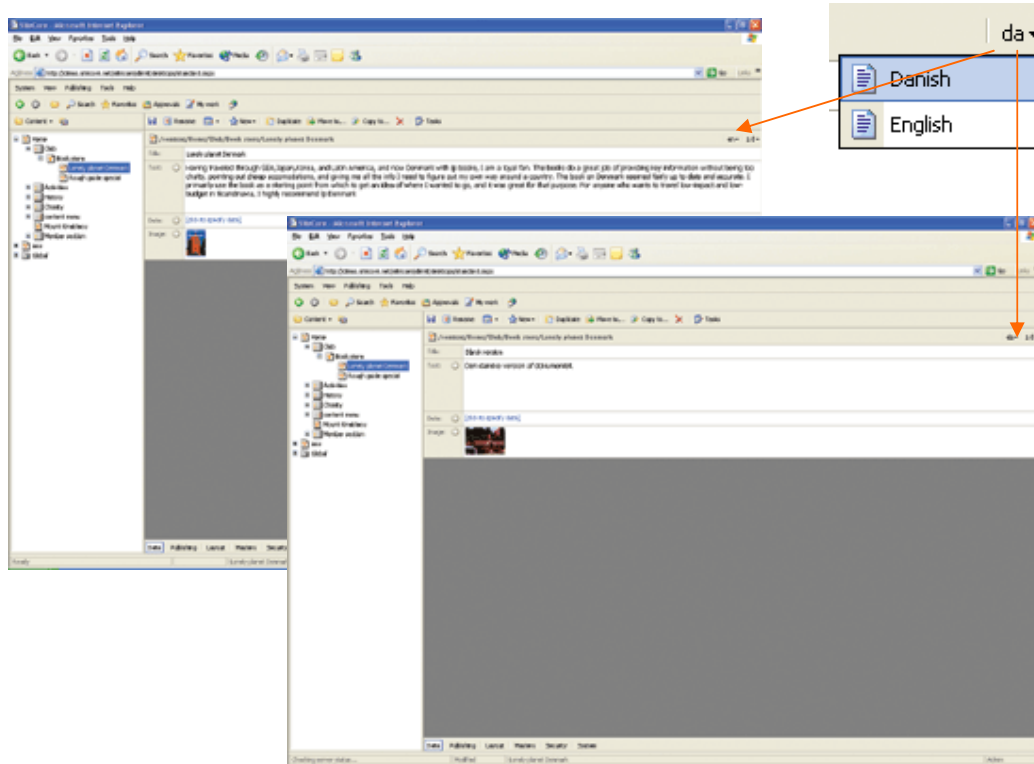


Figure 15 - Changing language for a document

Step-by-step instruction

- 1- Mark the document where text should be inserted.
- 2- Select the language you want to insert the text in. This is done by clicking on the wanted language. An empty version of the document appears, in which the translated text may be inserted.
- 3- You may now insert the translated text in the different fields.

7 Insert link

You can make many different types of links on your website; you can link to either documents or media within your own site, or to other websites – an external URL, or use the link to run a Java script. The different types of links are described below.

Step-by-step instruction

1. Mark the text that should be working as a link in the HTML-editor.
2. Click on the “Insert link” icon.
3. In the dialogue box use the drop down to select the type of link you want to insert. There are several types of links. Depending on the chosen type, there will be different fields to fill out. The fields are explained below.
4. Having filled out the fields, click OK and the link is inserted.
“Cancel” is used if the link is not to be inserted after all.
“Clear” erases your choice and you can start over filling out the fields.

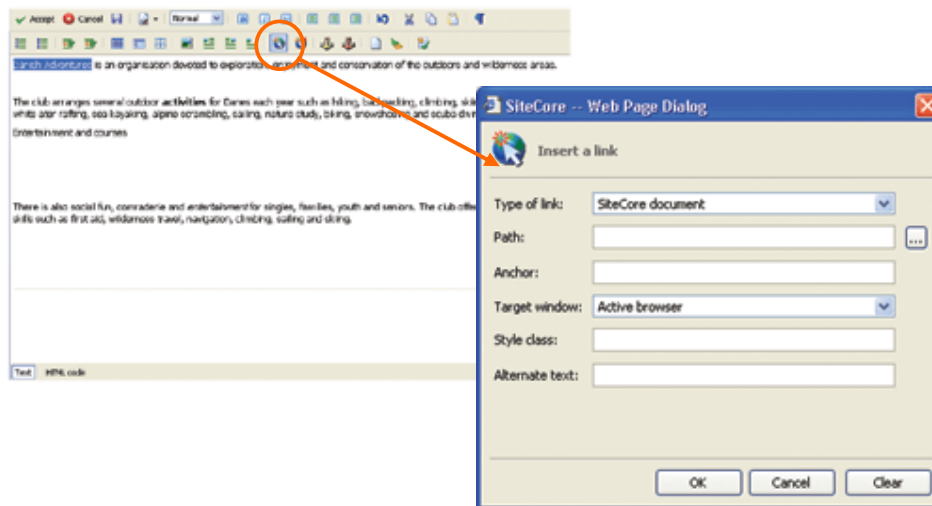


Figure 16 - Insert a link

7.1 The different types of links

Step-by-step instruction

SiteCore document

This is used to insert links to other pages on your website.

1. Click on the icon next to the "Path" field. A dialogue box appears with the tree structure of the entire site.
2. You mark the location you want the link to refer to, and click on "Link". You have now selected the type of link, and where the link refers to.

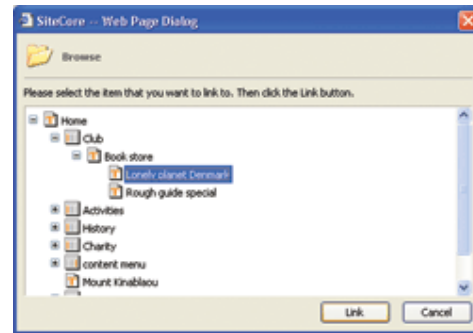


Figure 17 - Linking to SiteCore documents

SiteCore media

This is used to insert links to images in SiteCore.

1. Click on the icon next to the "Path" field. The media browser will appear.
2. You mark the image you want to link to. You have now selected the type of link and where the link refers to.



Figure 18 - Linking to SiteCore media

External URL

This is used to insert links referring to other websites.

1. In the URL field you write the address/name of the website you need the link to refer to. If you wanted to insert a link to the SiteCore website, you would write: <http://www.sitecore.net>. You have now selected the type of link, and where the link refers to.

JavaScript

This is used to insert JavaScript.

Mail

This is used to insert a link to a mail address. When clicked upon, the link opens up the mail client (e.g. Outlook), and the user can now send a mail. When selecting the type “mail”, a field named “mail to:” appears. This is where you write the address to which you want mails sent to.

Anchor

This is used to insert anchors to locations on the same page. You may therefore insert an anchor to a location on the page to which the link will refer.

Deleting links

If you want to delete the link, just mark the text and click on the icon “Remove link”. The link is now deleted.

Explanation to the fields	
Some fields are depending on the selected type of link	
Target window	This is where you choose if the page you are linking to, should be displayed in the same browser, or if a new browser should be opened when the user is clicking on the link. You also have the possibility to select custom browser. If this is chosen, an extra field will appear where you need to enter the target name. All links having the same target name will then be opened up in the same browser window on the user’s pc.
Anchor	If you have inserted an anchor on the page to where the link is referring, you can then write the name of this anchor. When the user clicks on the link, the page will then start where the anchor is located. This is used if you have very long pages in order to spare the user having to scroll down to find the required information.
Style Class	If you are using style sheet, you may here select the class of the link.
Alternate text	The text you write in this field will be shown when the user holds the mouse on the link.

8 Insert image

You may both insert images through the HTML editor and through fields specially designed for images.

Step-by-step instruction

1. Select the "Insert Image" icon in the HTML-editor, or click on the text "Click to specify image" next to the image field. The dialogue box above will appear.
2. Click on the "Media browser" icon and a new dialogue box appears in which you may select the image.
3. Mark the image you want to insert and click "OK". The images may be located in folders on which you open by double clicking.
4. You now return to the previous dialogue box, where you can see the image you selected for insertion. There are various fields you may choose to fill out. These decide on the properties of the images, and will be described below.
5. When having filled out the fields you need, click "OK", and the image is embedded. "Cancel" is used if you change your mind about inserting an image. "Clear" deletes your choice and you may start over inserting a new image.

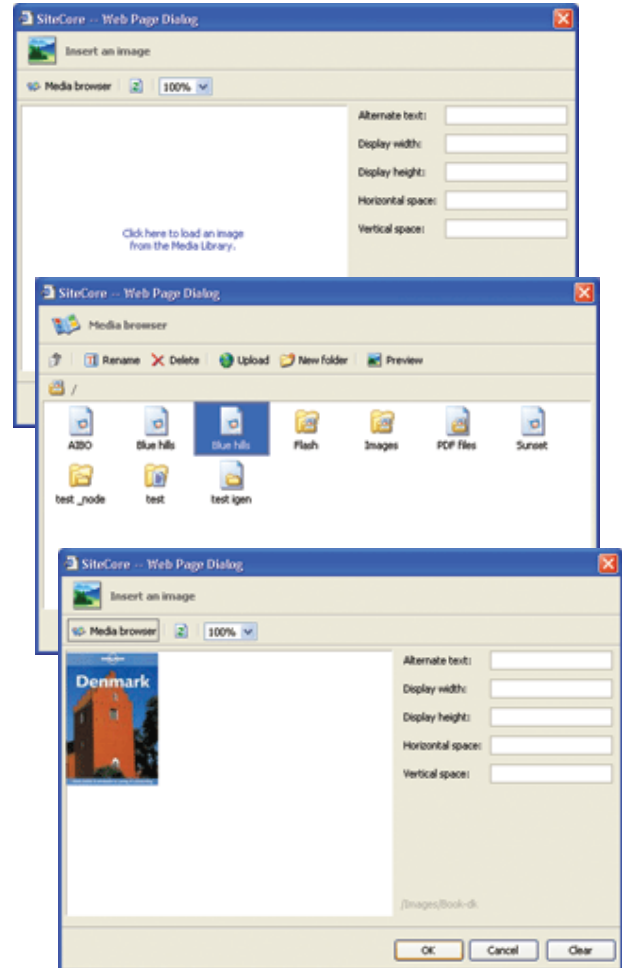


Figure 19 - Inserting images into documents

Explanation to the fields and check boxes	
Alternate text	The text you write in this field will be shown when the user holds the mouse on the link.
Display width	The width and height you wish for you image to be displayed in.
Horizontal space	The space you want free on both sides of the image
Vertical space	The space you want free above and below the image
Show image in SiteCore Client	If you have inserted the image in an image field, you can choose if you want the image shown in the SiteCore client.
Display thumbnail image	You can choose if you want the image shown as thumbnail (the image in a small size) in the SiteCore client.

9 Inserting new images in the media library

When you want new images inserted on your website, you need to put them in the SiteCore media library in order for all users to be able to use the new image.

Step-by-step instruction

1. You first follow the steps from last chapter, but instead of selecting an existing image click on the "Upload" button.
The following dialogue box appears:
2. By clicking on the "browse" button, a new dialogue box appears, from which you can select any image located on your computer.

Continued on next page...

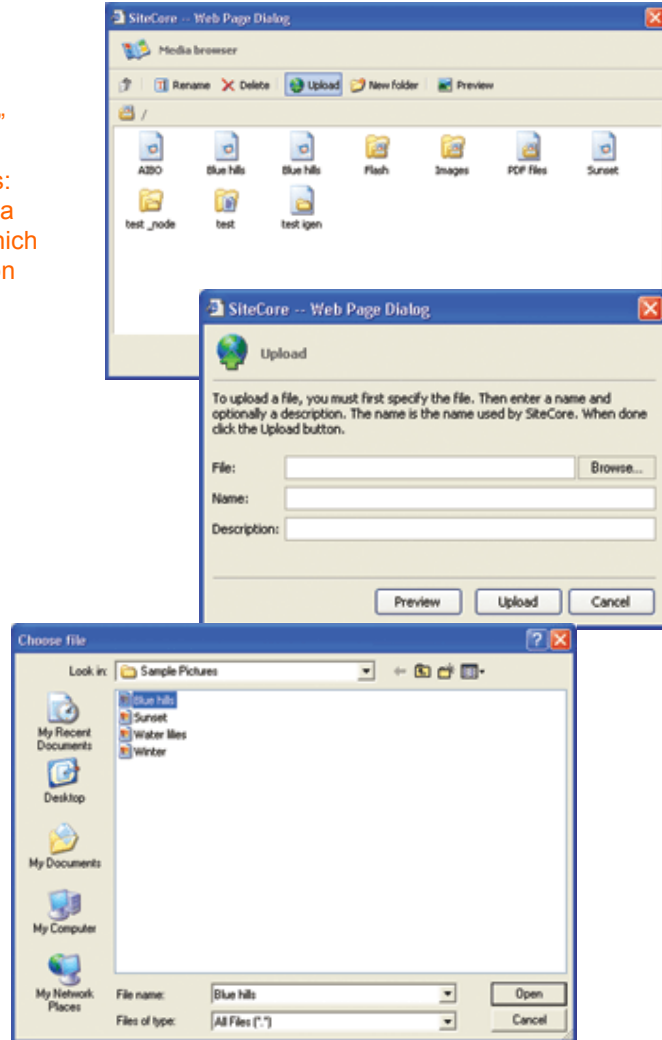


Figure 20 - Adding new images to the media library - A

Step-by-step instruction - continued

3. When you have chosen an image, you select "Open". You then return to the SiteCore dialogue box where you can name the image. The various fields and buttons for this dialogue box are explained below.
4. You then click on "Upload", and the image will be inserted in the media library. The image can then be selected just as any other image in the media library.

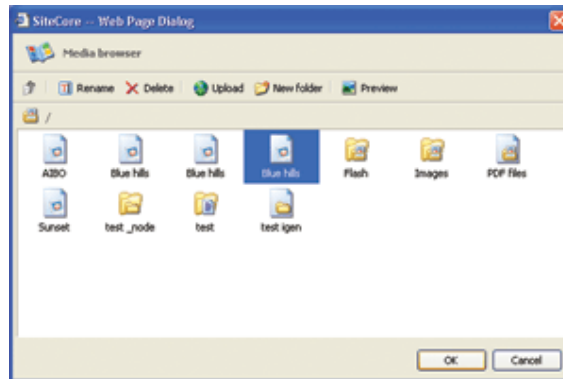
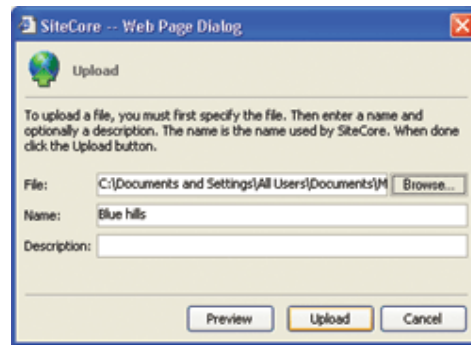


Figure 21 - Adding new images to the media library - B

Explanation to the fields and check boxes	
File	Shows the path of the selected image.
Browse button	By a click on the "Browse" button, you enter a dialogue box where you can choose among the images located on your computer
Name	This is where you name the image for the media library.
Description	The text you write in the description field will be shown as alternate text. I.e. the text which is shown on the site when holding the mouse over the image.
Preview button	If you select preview, an interface opens where you can see the image in question.
Upload button	If having selected a image, it will be inserted in the media library if you click on "Upload".
Close	Closes the dialogue box without inserting anything.

10 Create a new document

There are several options when having to create new documents. You can:

- Duplicate an existing document
- Copy an existing document
- Create an empty document

If you need to create a new document which resembles another much, e.g. there are many fields that need to be filled out with the same data, the easiest is either to copy or duplicate another document.

Step-by-step instruction

Duplicate an existing document

1. Mark the document which needs to be duplicated.
2. Select "Duplicate".
The following dialogue box will appear.
3. Enter the name of the new document and click "OK"
4. The new document has been created.

When you duplicate a document, the new document will be located on the same level in the tree structure as the one that is duplicated.

Copy an existing document

1. Mark the document which needs to be copied.
2. Select "Copy to..."
The following dialogue box with the content tree will appear.
3. Select where the new document should be located in the content tree.
4. Select "Copy".
5. The new document has been created.

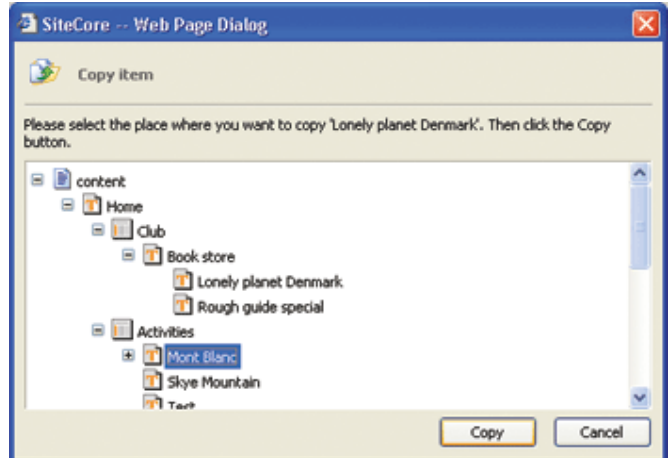
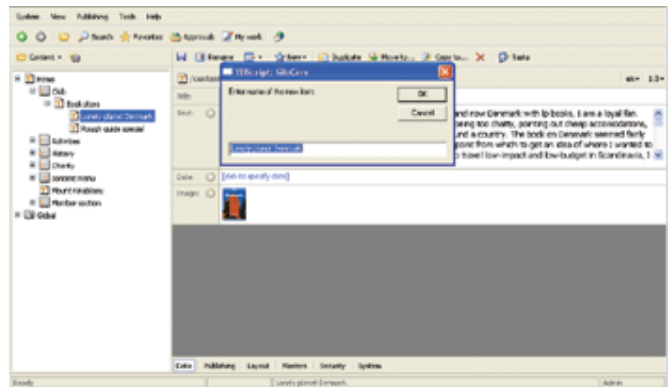


Figure 22 - Duplicating and Copying documents

Step-by-step instruction

Create a new empty document

1. Place the cursor on the location on the tree where you want to create the new document.
2. Click on the “New” icon and a dropdown menu appears if the settings allow the creation of new documents on that location.
3. Enter the name of the new document and click on “OK”.
4. The new document has been created.

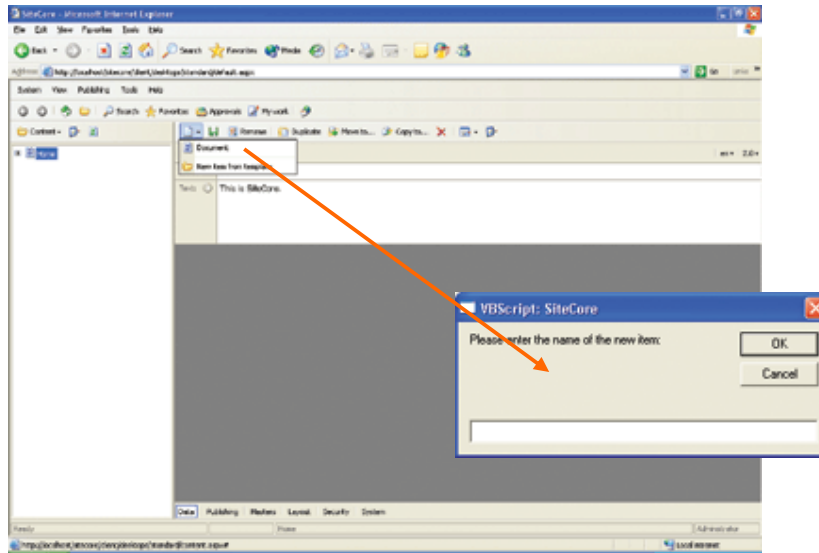


Figure 23 - Creating new documents

11 Publish for website

When changes have been made in SiteCore, they are not visible on the website right away. They have to be published to become visible.

Step-by-step instruction

1. Create new documents, insert new content, images etc. and save.
2. Click on "Publish".
3. The new changes are now visible on the website.

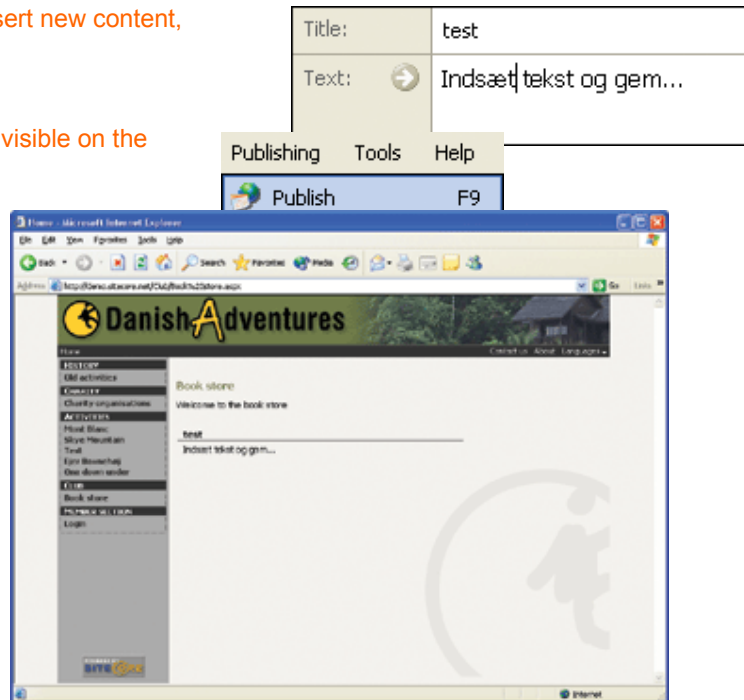


Figure 24 - Publishing on the website

See the changes before they are shown on the website

If you wish to see how your changes or modifications will look on the website, click on "Start preview". A new interface will open, where you can see the new version of the page, without having published it, i.e. you are the only person able to see the changes.

12 Approve documents

You can choose not to let all users have the authorization to approve changes to the website. If this is the case, content must be approved before publishing. A change made in a document by a user without the right of approval, will not be published before the approval having been made by a user with such rights. This will generally be an administrator or a webmaster.

There are two ways of seeing if there are changes or additions to the content, which has not been approved. You may either see it on each document, or you may open a menu where you have a general view of all the documents ready for approval.

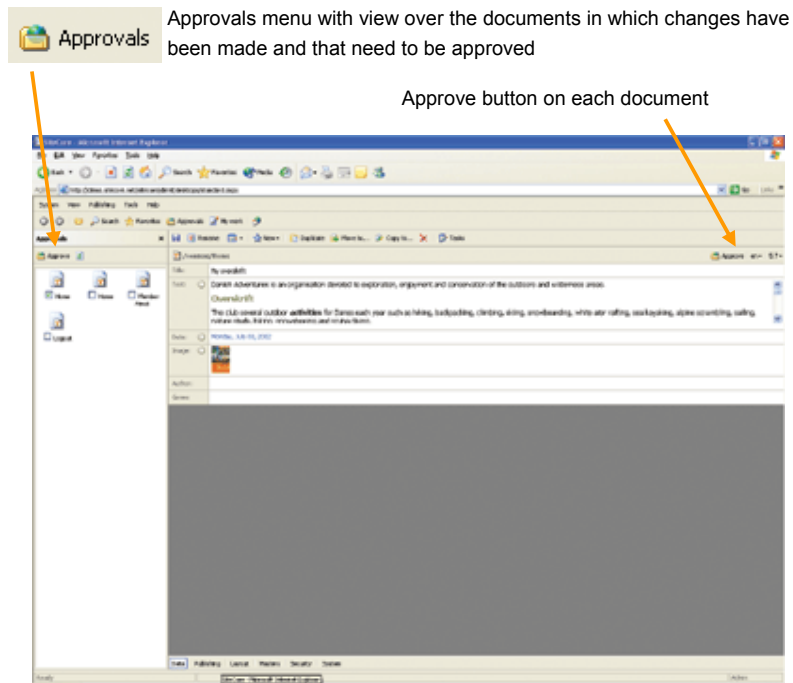


Figure 25 - Viewing documents for approval

Step-by-step instruction

1. Click on the “Approvals” in the menu bar.
2. A menu bar appears on the left side of the interface.
Here the documents which need approval are listed. You may click on the various icons to see the document in question.
3. Checkmark the documents you wish to approve, and click on the “Approve” button.
4. You will be asked if you wish to approve the chosen number of documents.
To close the “Approvals” menu, click on the “X” in the upper right corner of the menu.

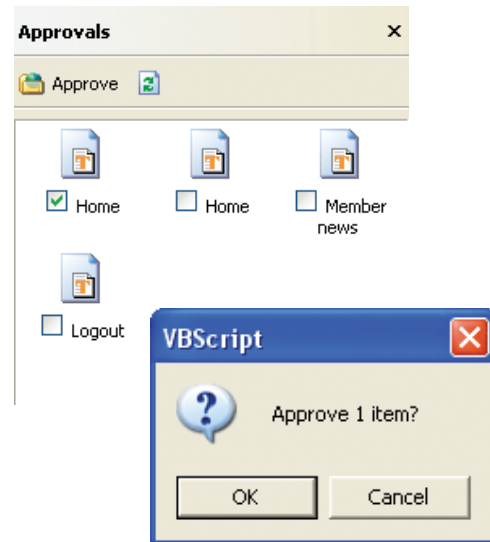


Figure 26 - Selecting documents for approval

Approve a marked document

When you mark a document, an “Approve” button will appear to the right, if the document needs approval. You may click on the “Approve” button and thereby approve the document.

13 Shortcuts

A shortcut to the documents that are frequently used can be created. This way you do not need to click your way through the tree every time you need to use a document.

Shortcuts to the documents are located in the side bar in the “Favourites” area.

Step-by-step instruction

1. You open up the favourites area by clicking on “Favourites” in the menu bar. The “Favourites” menu area then opens up.
2. To add a new document to the favourites list, you need to place the cursor on the document you wish to create a shortcut to.
3. Open your favourites menu, click on “Add” and your document is added to the list.
4. The next time you open up the favourites menu, you will have an easy shortcut to this document.
5. Creating and deleting shortcuts in the favourites menu will not affect the documents.
6. To close the favourites menu, click on the “X” in the upper right corner of the menu.

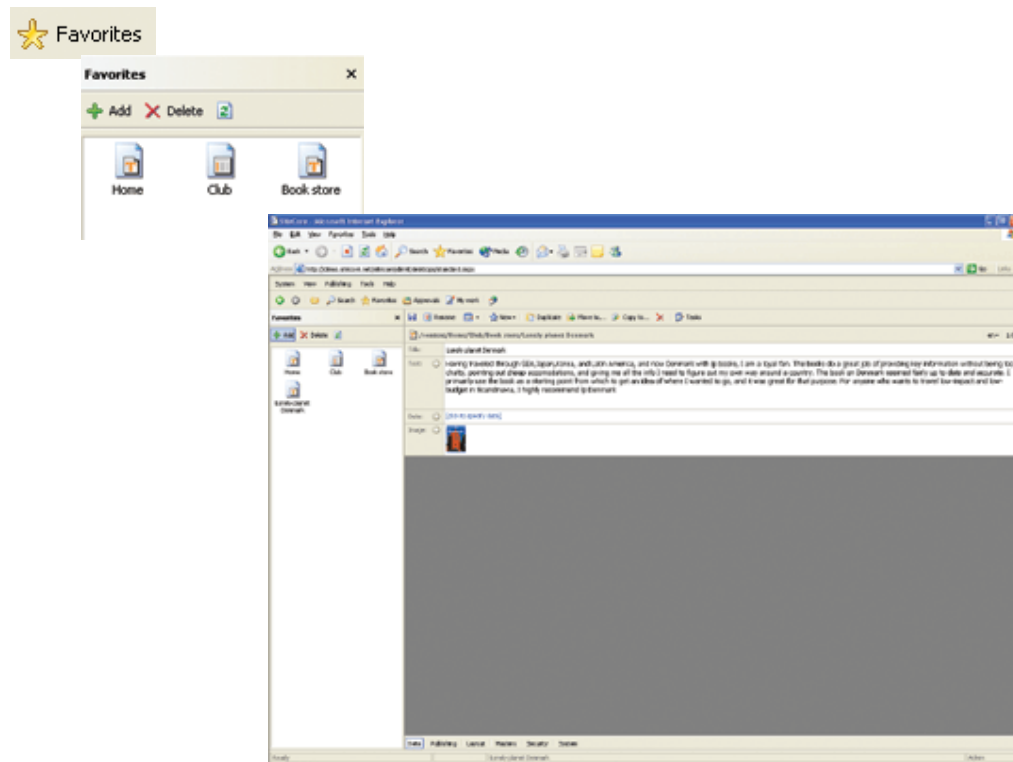


Figure 27 - Inserting favourites

14 Search

A search may be carried out based on various criteria in SiteCore. You can e.g. search for the names of the various trees, or for words occurring in a document.

Step-by-step instruction

1. Open the search area by clicking on “Search” in the menu bar.
2. To search for document names in the various trees, enter the name of the document you wish to find, and click on the green arrow.
3. If there are several documents containing the same search criteria, they will be listed.
4. There is also the possibility to make a more specific search. By clicking on the icon next to the search options, check boxes will appear and you may tick of various criteria.
5. In order to search for words occurring in a document, enter the specific word and tick of “Include fields” in the check box below.
6. Then click on the green arrow. The search results will then be listed.
7. Select a document from the list by clicking on it.
8. To close the “search” menu, click on the “X” in the upper right corner of the menu.

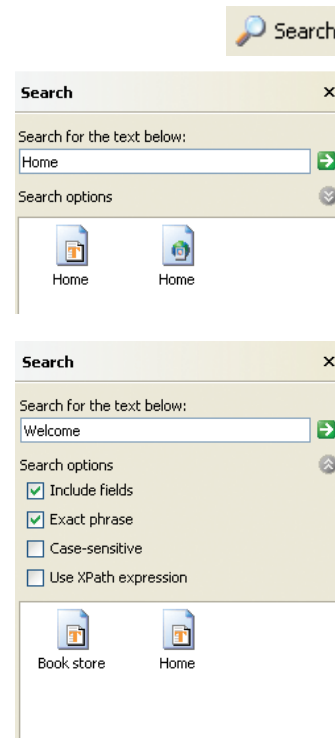


Figure 28 - Search function

Explanation to the different search options	
Include fields	Expands the search to the content of the documents.
Exact phrase	Search for specific phrases.
Case-sensitive	The search considers small and capital letters.
Use XPath expression	Is used by developers for searching with XPath.

USER MANUAL – PART III

15 Users in SiteCore

When several persons use SiteCore, these have to be set up as SiteCore users. Each user gets his/her own password, and the administrator decides on which properties apply to each user.

If a given user needs the option of previewing and if he/her needs to publish for the website, this may also be set up.

Authorisations may be set up on each document in SiteCore. I.e. you can decide which users have rights to the different documents.

You can decide on whether some users, for example, only have access to edit specific documents. In this way, you can split up the website, so that only the persons, who should be able to make alterations in a specific area, are the only ones actually having access to it.

Authorisation may be created in many different ways. You could e.g. decide that the users responsible for a given area also have the authorisation to publish the content of the website in their area. You may also wish for just one person in a company to be responsible for the final approval of content before publishing it to the website. This is something the administrator should have decided before starting to create users/groups and setting up the rights.

An example of how the rights could be set

Members		Rights
1	Contributor	Has the right to write and read documents concerning e.g. news.
2	Editor	Has the right to write, read, create new documents and delete documents everywhere in SiteCore.
3	Administrator	Has the right to do everything on all documents. The administrator is the only user who can publish for the website.

15.1 Create a user

Step-by-step instruction 1

New users to SiteCore can be created in several manners.

1. One of the ways is to:
2. Click on the menu item "System" and select "New..."
A dialogue box appears
3. Select "Core User" and click "Create".
4. Another dialogue box appears. Enter the username of the new user.
5. The new user is now created, and the various fields (see below) can be filled out.

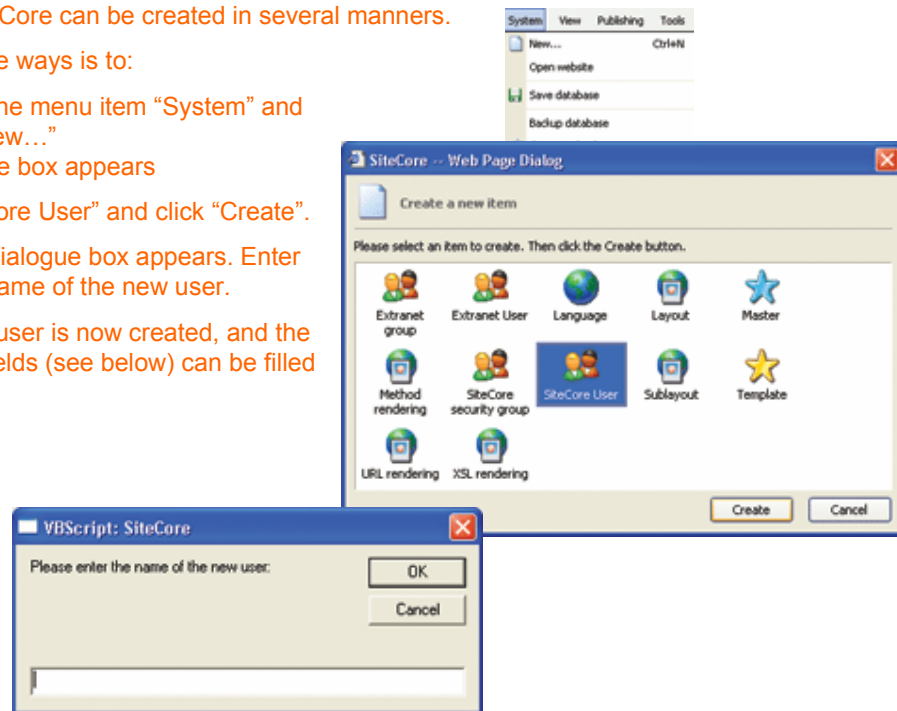


Figure 29 - Add new user - 1

Step-by-step instruction 2

Another way to create users is to select the “Security” item in the tree.

1. The following interface will appear. A new user or a new group may be created here.
2. To open up the list with the creating options, select “Show manager”.
3. A dialogue box appears. Enter the username of the new user.
4. The new user is now created, and the various fields can be filled out (see below)

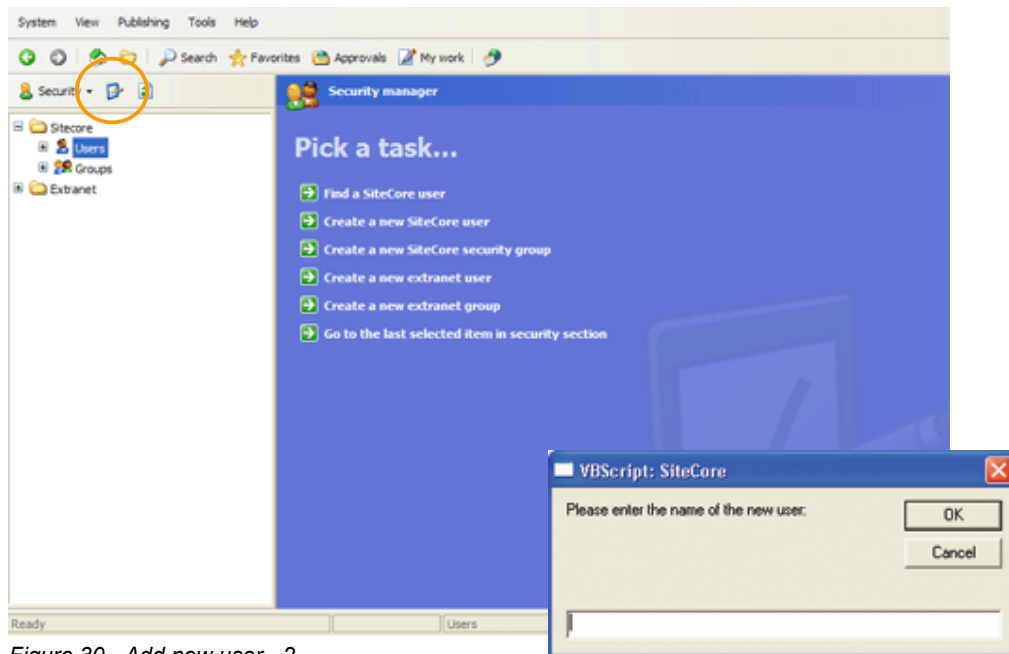


Figure 30 - Add new user - 2

15.2 Create a new group

To create a new group, proceed as with the new user, but select “new group” instead of “new user”.

15.3 User “Data” tab

There are various settings possible for each user. They are e.g. concerning the rights of each user in SiteCore.

Figure 31 - Editing user data

Explanation to the fields in the user “data” tabs	
Full name	This is where you enter the name of the user. The name will show on the status bar when the user is logged on.
Password	Password used upon login to SiteCore
Blank Password	When this field is ticked of, the user will be set up with no password.
Email	Field for entering the e-mail address of the user.
Membership	The user’s memberships of various groups may be selected here. It is possible to be member of several groups.
Administrator	This user has the right to doing all tasks in the system
Developer	This user has the right to doing developer tasks in the system
Can preview	When this field is ticked of, the user may use the preview option
Can publish	When this field is ticked of, the user may publish for website
Can boost	When this field is ticked of, the user may boost the number of simultaneous users of SiteCore for a limited period of time.
Default rights	This field is destined developers. Further information is on: sdn.sitecore.net

15.4 The “settings” tab

Each user needs different settings. These determine the way SiteCore should look for this user. To make these fields appear, select the “Settings” tab.

Figure 32 - Editing User settings

Explanation to the fields in the user “settings” tab	
Default language	Determines the language in which the documents must start up.
Client language	The language in which the client must be shown is determined here. I.e. if you e.g. wish for the program to run in Danish for a specific user.
Start in preview	For the users that only use SiteCore through the preview function, you may choose to let SiteCore start up directly in preview.
My work	This is where are defined which options each user should have in “my work”, which is a direct access to the documents in which the user work. The access is obtained by clicking on the “my work” button in the menu bar.
Theme	The developers have the option of setting up colours and icons for the users of SiteCore. The administrator may then select the view for each user.
Desktop	The user’s view in the SiteCore client.
Default item	The default document which opens up upon login to SiteCore.

16 Assignment of rights

16.1 SiteCore users

When wanting to assign rights to documents, it is done by assigning rights to groups. There is no limit as to the number of groups. Then the groups' rights to the various documents are to be decided on. Finally specific members are assigned to the groups with the proper rights.

You may create as many groups as needed, and the setting up of these is done in the same way as creating users.

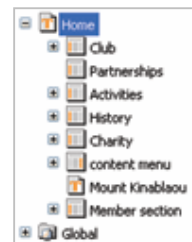
If the users should have different access to the documents, you also need to create a certain number of groups when setting up the users.

What must be decided on before assigning the rights?

How many different groups are needed?

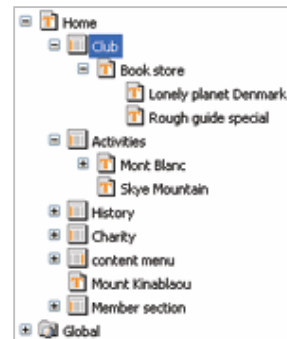
What access do the various group need on the various documents?

When having decided on these things, you may proceed by setting up rights on the documents. You may later decide which users should be members of which groups.



Assignment of rights on content

When assigning rights, the easiest is to start from the top, i.e. from the top document (the home document). It will not be necessary to assign rights to all documents, as it is possible to copy the rights to the underlying documents.



Transfer of rights to underlying documents

You may decide to let the rights you assign to the home document be quite vague, and let all the underlying documents have the same rights. It is then possible to enter the next level down and set rights to the documents that require special rights.

For example: If you set up rights on the “Club” document in the example, the transfer of the rights to the underlying documents will be valid for the frame.

“Activities” in the example, and the documents under this point will not be affected by these rights, as it is not lying under the “Club” folder, but is located on the same level. In this way it is possible to work your way down the tree structure in the fastest possible manner.

The way in which the rights are transferred to underlying documents is by selecting the “Apply to children” button. In the dialogue box, it is then possible to decide whether the rights should only apply to documents made from certain templates or whether it should apply to all underlying documents.

Step-by-step instruction

1. Click on the document where rights are to be applied.
2. Select the "Security" tab.
3. Click on the arrow next to the "Security" field.
A dialogue box appears.
4. Tick off which rights must apply for each group concerning a specific document.
5. If the underlying documents should have the same rights, select "Apply to children".
6. A new dialogue box appears, in which you choose if the rights should apply to all underlying documents, or just to documents made from certain templates or masters.

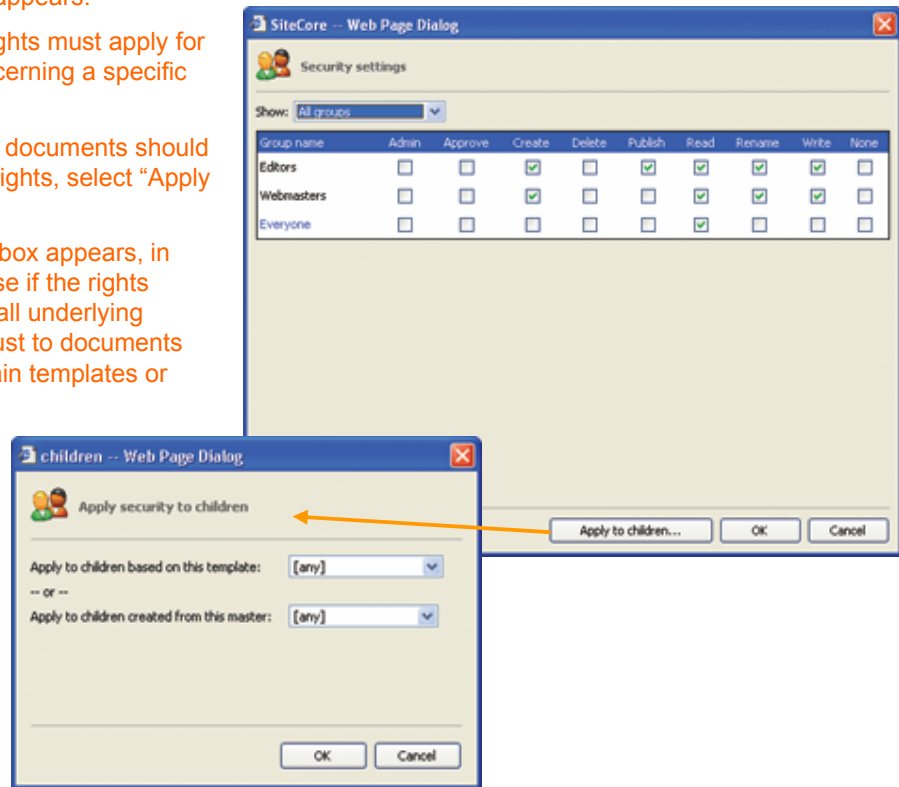


Figure 33 - Applying rights to users

Explanation to the various rights	
Admin	The right to view the various rights which apply to a document.
Approve	The right for all members of a group to approve documents.
Create	The right to create new documents.
Delete	The right to delete documents.
Publish	The right for a user to publish a specific document and the underlying documents. This is used if a user needs the possibility to publish only parts of a website, e.g. a sub site.
Read	The possibility to view a document.
Rename	The right to rename the document.
Write	The right to edit and write text.
None	No rights to the specific document.

16.2 Extranet users

If there is an extranet on the website, SiteCore can determine which pages on the website, users should be allowed to view.

Users of the extranet are created in the same way as SiteCore users. See the step-by-step instruction in Chapter 15.

The setting up of the access for extranet users to the various pages is carried out in the same way as with other SiteCore users.

Upon login, an extranet user has the rights to the documents visible to the group he/she is a member of.

User name:

Password:

Step-by-step instruction

1. If there are no extranet rights set to a document, it may be viewed by everybody.
2. Click on the document where you want to set rights.
3. Select the "Security" tab.
4. Click on the arrow next to the "Extranet" security field. A dialogue box appears.
5. You may click on the groups that need rights to read the specific document.
6. If an underlying document needs the same rights, select "Apply to children".

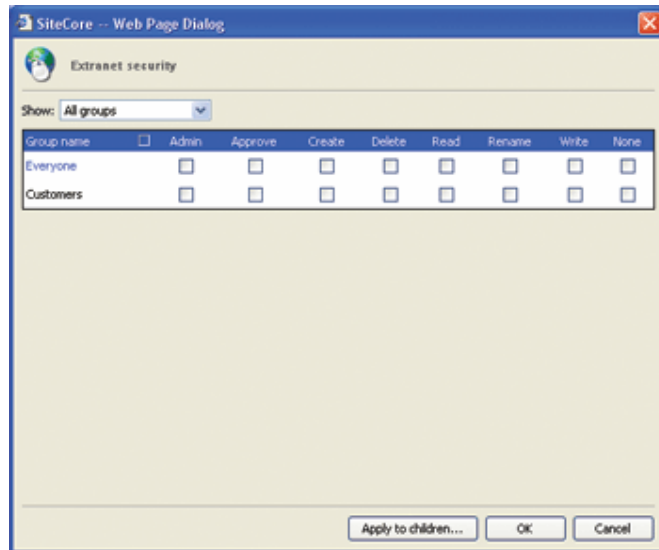


Figure 34 - Setting Extranet rights

17 Administration of the database

The entire database should be saved regularly. I.e. to save everything you have in SiteCore. This may e.g. be done from the “database tasks” interface.

A back-up of the database should also be made, i.e. a copy of the database is made.

Can you regress to previous versions?

Yes, if something has been deleted which should not have been deleted, or if many wrongful changes have been made, you may choose to “re-load database from the latest file in the “database” interface.

Database tasks	
Save database	Saves the database
Backup database	Makes a backup of the database
Compact database	Cleans up the database
Reload database from the latest file	Fetches the last saved version of the database

GLOSSARY

A The various menu bars

The content area is the area where the various documents may be viewed and worked in. For this, various elements/menu bars offering various options are at your disposal.

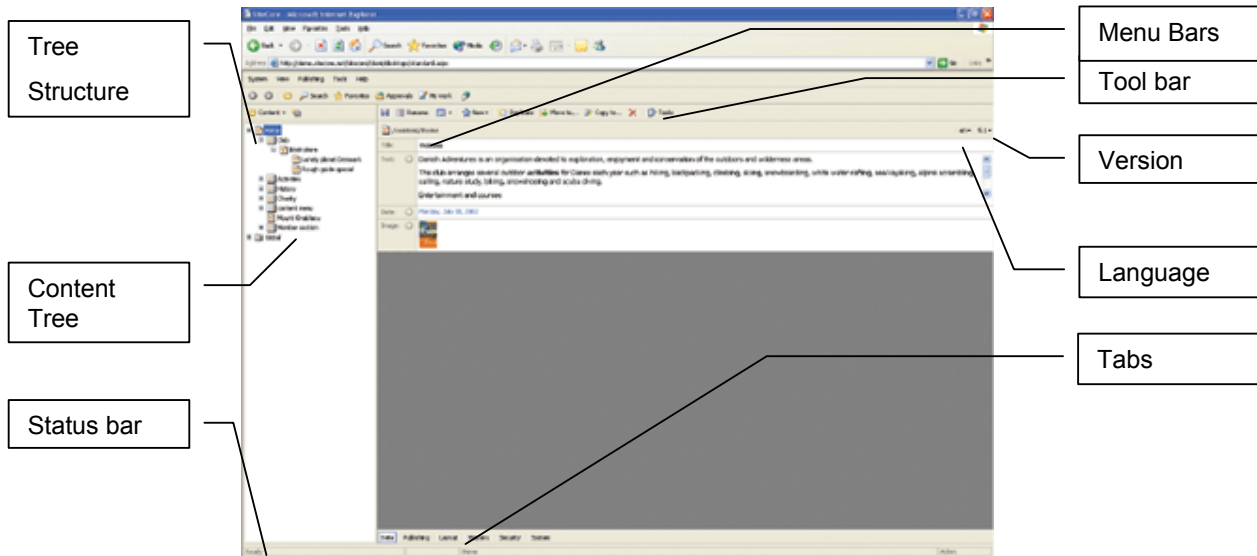


Figure 35 - SiteCore client

Explanation of the various elements	
Menu bars	The top menu bar consists of drop down menus with various options concerning the total content of SiteCore. E.g. "Backup", "Publish to website". The underlying menu bar opens up various side menus in the left margin of the interface, e.g. "Favourites" and "Search".
Tree structure / Content tree	There are different tree structures in SiteCore. The most frequently used is the Content tree, which shows the hierarchy of your documents. This works in the same way as the Windows Explorer.
Status bar	Contains messages from the system regarding user and status.
Tabs	There are much information and different settings to each document. To view different information, click on the tabs in the bottom.
Tool bar	Reflects the possibilities of each document, e.g. "Save", "Delete" or "Create" a new document.
Version	You may select a specific version of the document.
Language	Selection of the language versions of the document.
The various elements will be explained thoroughly in the following chapter.	

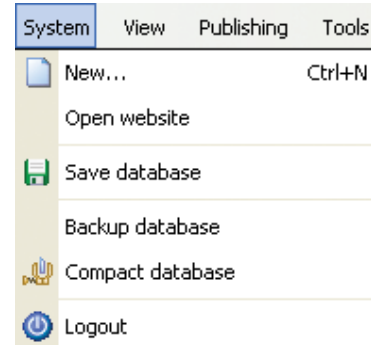
A.1 Top menu bar

The top menu bar contains various dropdown menus with various options. The options concern all content of SiteCore.

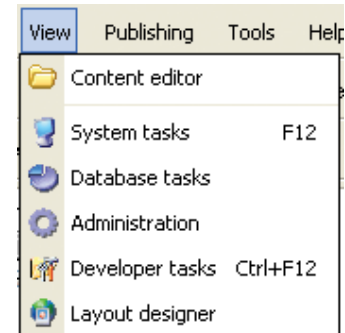
System View Publishing Tools Help

Below there are explanations to the various options.

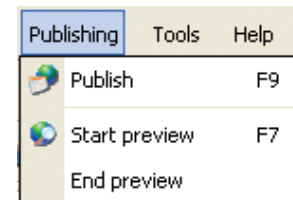
System	
New...	Opens an interface where new elements may be created. E.g. new users and user groups may be created.
Save database	Saves the database
Backup database	Makes a copy of the database
Compact database	Cleans up the database
Logout	Logs off the user, and opens up the login interface



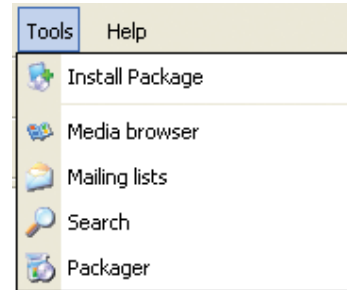
View	
	Opens the various interfaces of SiteCore. From these interfaces various tasks may be accomplished. The various tasks of the interfaces are described later in the glossary.



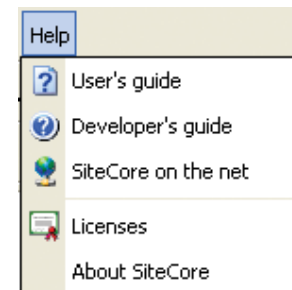
Publishing	
Publish	Publishes to website
Start preview	Opens up a new interface where you may see how your website looks. The website is in an editable version.
End preview	Closes the preview interface.



Tools	
Install Package	Is used if you have new packages you wish to install in SiteCore.
Media browser	This is a dialogue box with all the images you have saved in SiteCore. In this browser you may do various things, e.g. create new folders, rename images and folders and upload images.
Packager	By selecting this item on the menu, an interface opens with various task possibilities concerning packages. You may e.g. create a new package, edit an existing package, or install a package. NB! This is an advanced function – please refer to the developer documentation
There may be more functions to the “tools” menu. I.e. if a company has bought an extra module e.g. “mailing lists” or “search”	



Help	
User manual	Links to the user manual
Developer manual	Links to the sdn.sitecore.net. Developers in SiteCore may find various kind of information here. Using this site requires logging in.
SiteCore on the net	SiteCore's website
Licenses	Information concerning licence agreements for the various modules.
About SiteCore	Information concerning e.g. which version of SiteCore is running.




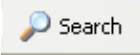

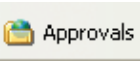




A.2 Underlying menu bar

This underlying menu bar opens e.g. different menus in the margin which will be shown in the left side of the interface. These menus cover the content tree and may be closed by clicking on the "X" in the upper right corner of the menu.



This menu can, for example, open "Favourites" and "Search" which are intentionally similar to Microsoft Explorer.

The various possibilities of the menu bar		
	Back/ Forward	Works in the same way as the icons of the Internet Explorer. This way you may click forth and back between previously marked documents.
	Home	Returns to the "home" document. It is a shortcut to getting to the top document of your content.
	Content	Shows the tree structure. This is used to quickly get back to your documents if you had opened a menu which covered the tree structure.
	Search	By clicking on "Search", a menu appears, and thereby allows different searches in SiteCore.
	Favourites	In the "Favourites" menu you may create shortcuts to the frequently used documents. By click on the "Favourites" menu, a menu appears to the left where the shortcuts will be listed.
	Approvals	Overview over the documents which require approval before being published for website. This is an easy access to the documents which need approval and the various documents may also be approved there.
	My work	This is where the documents in which you work most frequently are placed. In this menu it is possible to create and delete documents. The developer sets up this function.
	Publish	Publishes to website

B Explanation to the tree structure

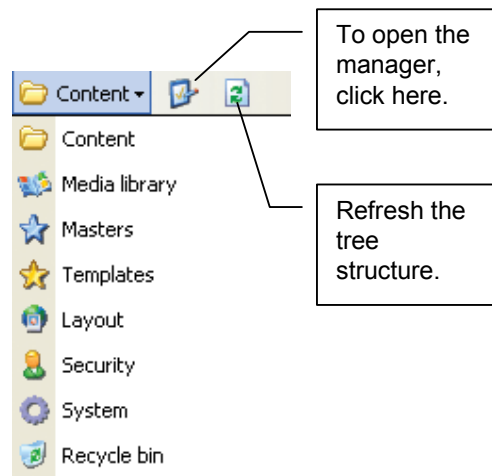
In a dropdown menu you can select which tree you want in your view. You will not necessarily have rights to view them all - most frequently you will only be able to view the content- and the media library.

In the content tree you may view all documents and their content.

In the media library all the images used on the website will be located.

New users are set up in the security tree.

To all trees there is a manager, which is a list of the options for the selected tree. To see this list, click on the icon "Show manager".



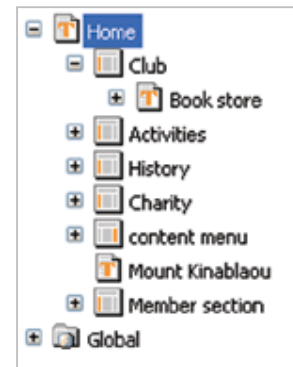
Content tree

The content tree shows your documents. You have various documents which are the basis of the website. These documents are saved in a hierarchy which often resembles the structure of the website.

Graphically this is illustrated by icons. There are many different sorts of documents which may contain different things. Documents may work as folders and therefore contain various sections.

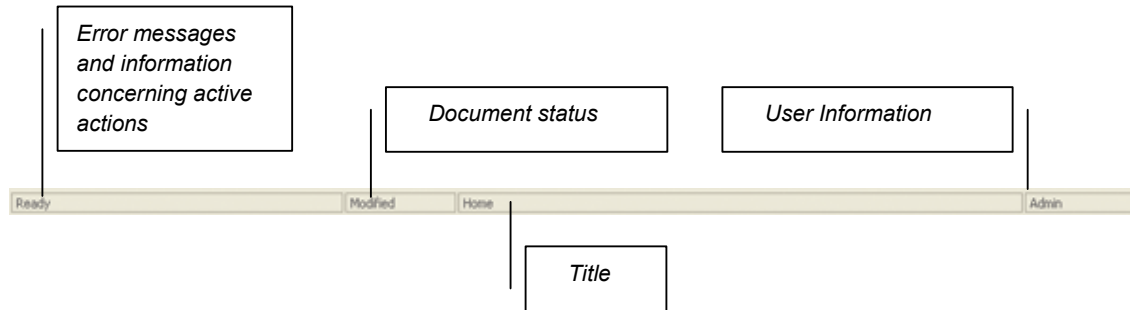
There will always be a (+) or a (-) next to a document which works as a folder. A plus shows that the document is compressed. A minus shows that the document is unfolded.

You unfold the tree by clicking on (+) and it is compressed by clicking on (-).



C Content of the status bar

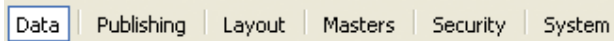
The status bar is primarily used to give messages from the system to the users, and is divided into four sections.



The status bar	
Error message/ information	E.g. that the system is publishing for the Internet. If there is no status, "Ready" is indicated.
Document status	May be shown in two ways. Blank or Modified. The last mentioned indicates that a document has been altered since it was saved last.
Title	Indicates which document has currently been selected. This is often useful if the user scrolls away from the active document in the content tree.
User information	Shows the name of the user logged on to SiteCore

D Tabs

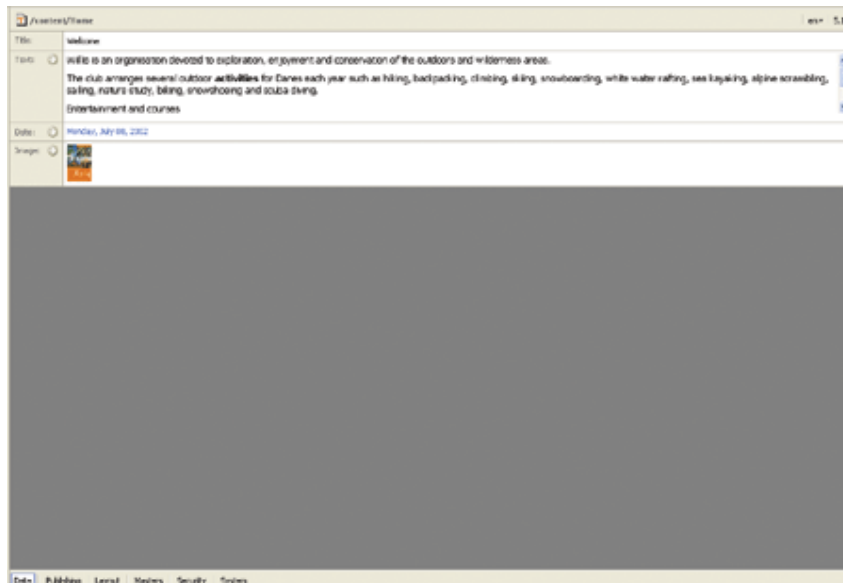
To every document there is much information and many settings. In order to see these you may flip through the tabs at the bottom of the interface. The various information all belong to the marked document in the tree structure. Depending on your access rights, you may see some or all of the tabs.



D.1 The “data” tab

When the “Data” tab is marked you may view the fields belonging to the document.

This is where you type your text and insert images. The shown fields depend on the type of the selected document.



D.2 The “Publishing” tab

You may utilise the options of this tab, if you wish to prepare content for publishing on a certain date.

You may control when content is to be published to the site, and when e.g. it should be deleted again. I.e. you enter your text which is to be shown on the website on a later date, and indicate for how long it should be visible on the site.

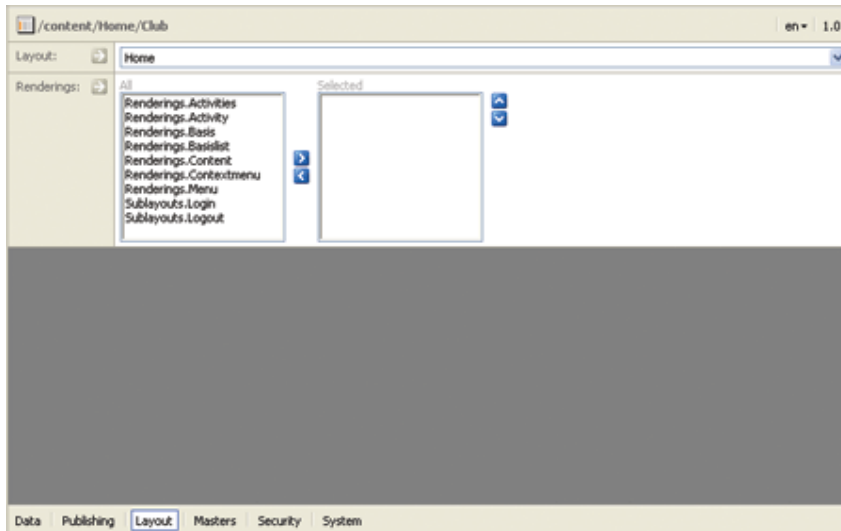
Publish date and time is set to whenever you wish that the document should be published to the website. Unpublish date and time is set to when you wish for it to be removed again. In addition there is a check field, “do not publish”, if a document should not be published.

Publication is not automatic in SiteCore, you need to select “Publish” before eventual changes take effect.

In the publishing tab you find the following fields.

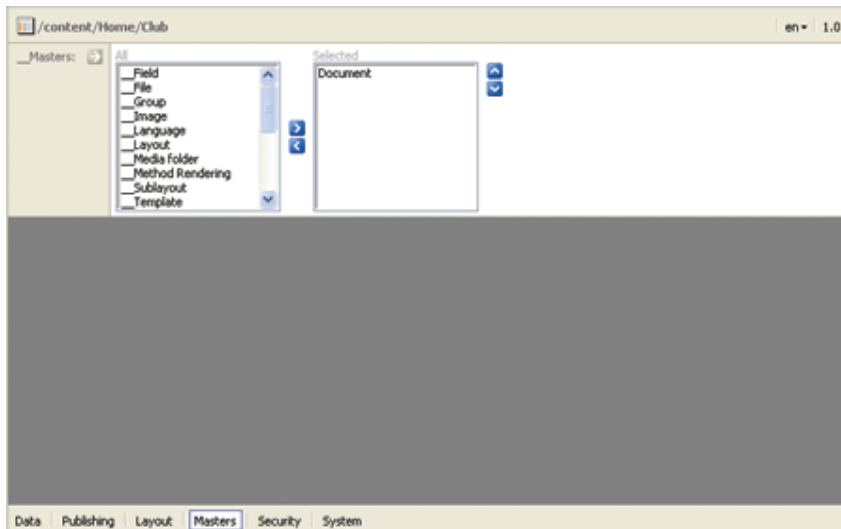
Publishing groups	Here the publishing group to which the selected document belongs is selected.
Publish date	Date and time for when the marked document is to be published to the website. By clicking on the arrow, a calendar appears from which you can select a specific date.
Un-publish date	Date and time for removing the document from the website.
Do not publish	Is marked if you do not wish for the document to be shown on the website.

D.3 Layout tab



In the “Layout” tab you select on which layouts should apply to your documents. This is used by developers, further information may be found on sdn.sitecore.net.

D.4 Masters tab



A master is a template of a document where you may set various values and settings.

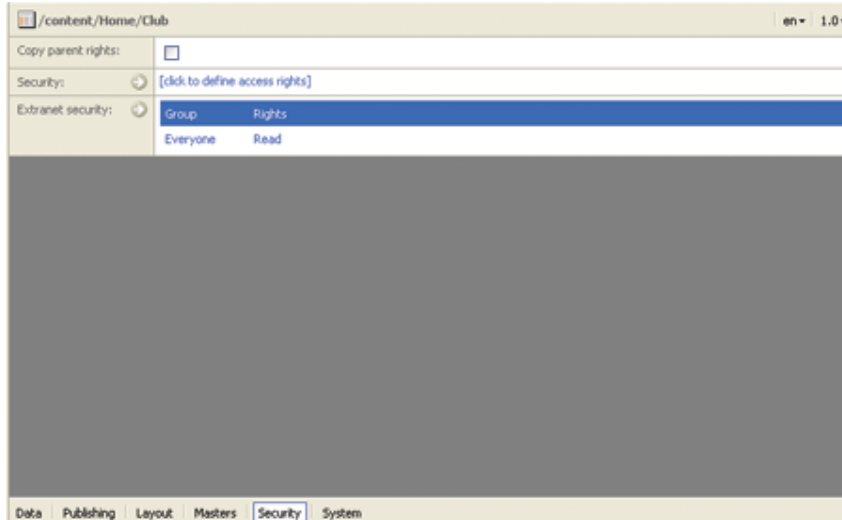
In the “Masters” tab you may apply masters to a document. You may choose which should apply to the document from the list of existing masters.

The selected masters will behave as the documents are possible to create under the given document.

D.5 Security tab

You may here insert rights to the document.

The various fields are explained below.



Copy parent rights	May be used on masters. When creating a document from a master, with this field ticked of the document will have the same rights as the document it is placed under.
Security	This concerns the intern security settings in SiteCore. When clicking on the field, a dialogue box opens up where the rights of each group may be ticked of. The rights apply to the marked document. By clicking on “Apply to children”, you may apply the same rights to the documents lying under the marked document.
Extranet security	If you have an extranet where only parts of the site is accessible to clients with login, you may here define their rights. This is done in the same way as with the internal security settings in SiteCore.

D.6 “System” tab

Contains various fields which mainly interest developers. E.g. on which template the document is based, and thus change template. In addition you may see the sort order and the name and ID number of the document.

The screenshot shows a web interface for editing a document. The breadcrumb path is '/content/Home/Club' and the language/version is 'en - 1.0'. The form contains the following fields:


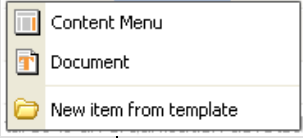












- Name:** Club
- ID:** {87572E9C-5AE9-4D9A-A4EC-34A22C9023E1}
- Template:** Main Item (with arrows for selection)
- Master:** (empty)
- Sortorder:** 10
- Icon:** (empty)
- Style:** (empty)
- Editor:** (empty)

At the bottom, there is a navigation bar with tabs: Data, Publishing, Layout, Masters, Security, and System (which is currently selected).

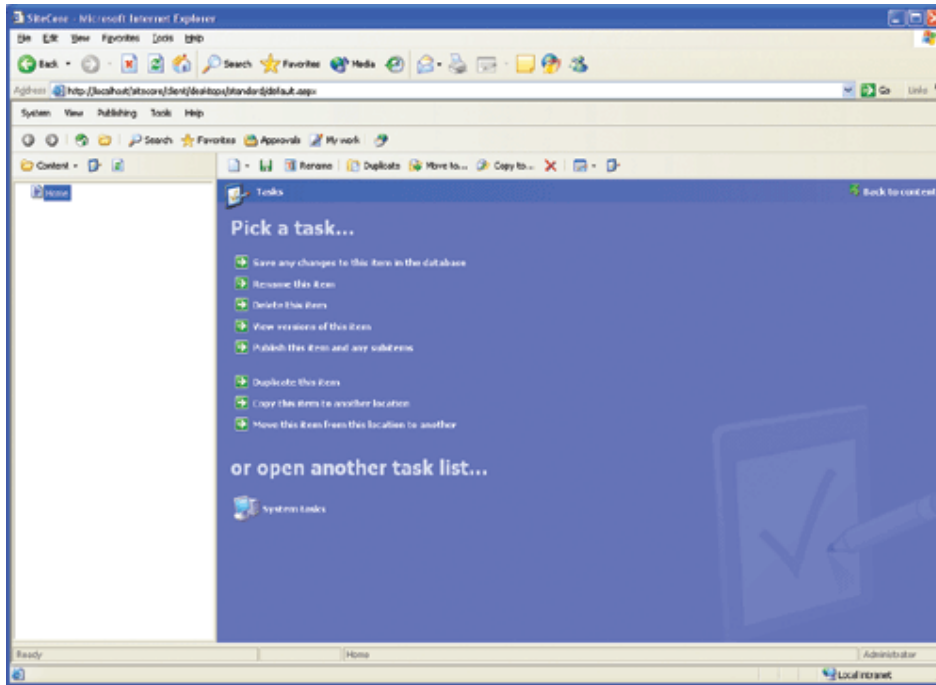
Name	The name of the document. This is the same name as can be seen on the tree structure
ID	All documents have a unique ID, which may be viewed here.
Template	Shows which template applies to a document. By clicking on the arrows it is possible to either directly access the template or to change to another template.
Master	Field for use to future versions. Which master applies to a document may be seen here.
Sort order	Shows the sort order of the documents.
Icon	Certain icons should appear in the tree structure, this is where they should be inserted.
Style	This is where the font for the names in the tree structure is set up.
Editor	An aspx file may be inserted here if you want a special editor to a document. The insertion will be shown on another tab named “editor”. This field is used by developers.

E Content of the tool bar

These icons are depending on your rights. If you do not have the right to perform an action, the icon for this action will not show.

	<p>New</p> 	<p>Is used to insert new documents. When inserting a new document, it will be inserted as an underlying document to the document you have marked. Usually the types of sub items to a document will have been defined.</p> <p>These will be shown on the top of the dropdown menu (in this example the “document” and “content” menu).</p> <p>Furthermore you may insert a new document directly from a template.</p> <p>New item from template. The template that is to be the base of the document is selected from a dialogue box.</p>
	<p>Save</p>	<p>Saves changes in the document.</p>
	<p>Rename</p>	<p>Renames the document. An input box opens up in which you write the wanted name.</p>
	<p>Duplicate</p>	<p>Duplicates the marked document. A double of the document is created on the same level.</p>
	<p>Move to...</p>	<p>Moves the marked document. A dialogue box opens up and in the tree structure you mark where you want to move the document.</p>
	<p>Copy to...</p>	<p>Copies the marked document. A dialogue box appears and you select where you want to insert the new document in the tree structure. The new document is a copy of the marked document. If this document had sub items, they would also have been copied.</p>
	<p>Delete</p>	<p>Deletes the marked document. A warning box appears before the document is deleted, and you may therefore always abort.</p>
	<p>Clipboard</p>	<p>Various options which are used by developers.</p>
	<p>Copy Paste</p>	<p>You may use “Copy/paste” to clipboard if e.g. you have nodes that need to be copied to another website.</p>
	<p>Delete all sub-items</p>	<p>Deletes all documents which are sub items to the marked document.</p>
	<p>Re-sort all sub-items</p>	<p>Deletes the content in the “sort order” fields.</p>
	<p>Deactivate linked databases</p>	<p>Deactivates all linked databases. Linked databases are plug-ins, e.g. a file system.</p>
	<p>Item tasks</p>	<p>Shows the interface with all the options for the document.</p>

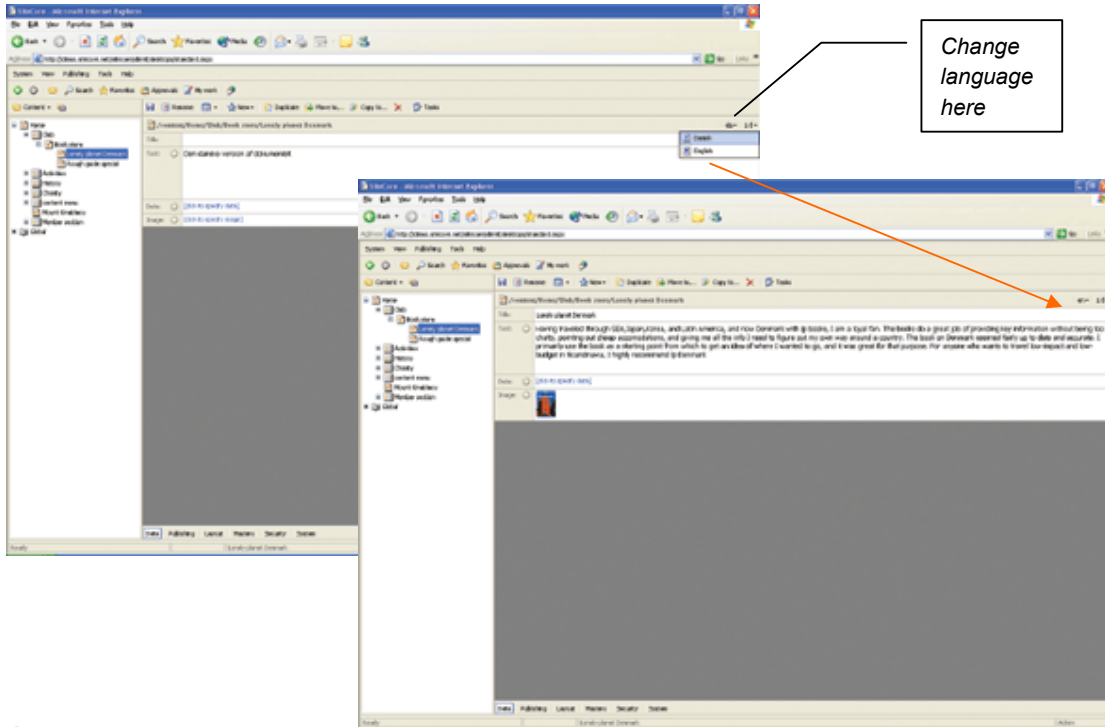
F Item tasks



Save any changes to this item in the database	Saves the changes in the marked document
Rename this item	Renames the marked document
Delete this item	Deletes the marked document
View version of this item	Shows the various versions of the document and creates new versions
Publish this item and any sub items	Publishes the marked document and its sub items.
Duplicate this item	Duplicates the document. Creates an identical document on the same level.
Copy this item to another location	Copies the marked document. A dialogue box opens up and you select where to insert the new document in the tree structure.
Move this item from this location to another	Moves the selected document. Clicking here opens a dialog box where you may select the location the document should be moved to.

G Language version

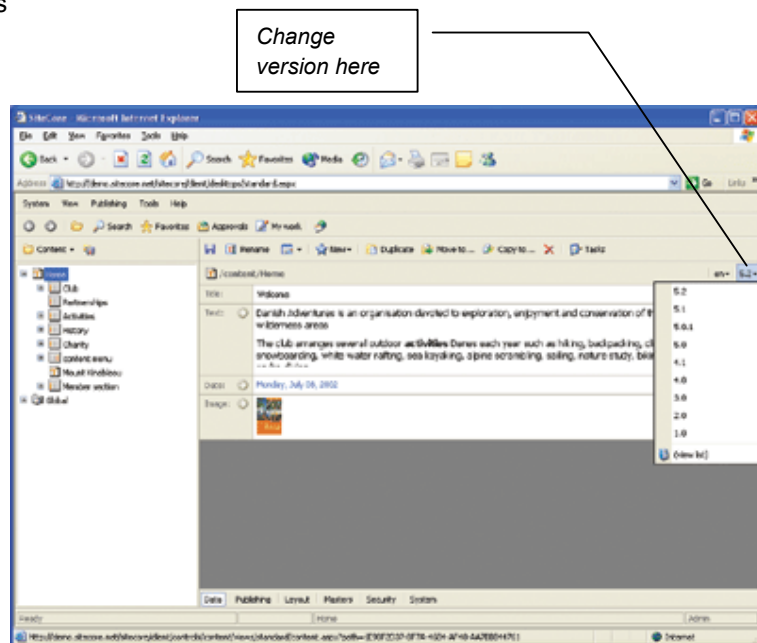
You may change language among the ones listed. You may have different images etc depending on the language, but the structure itself of the content tree, the sort order of the document and the name and ID number remain the same. The same document is shown below, but in different language versions.



G.1 Versions

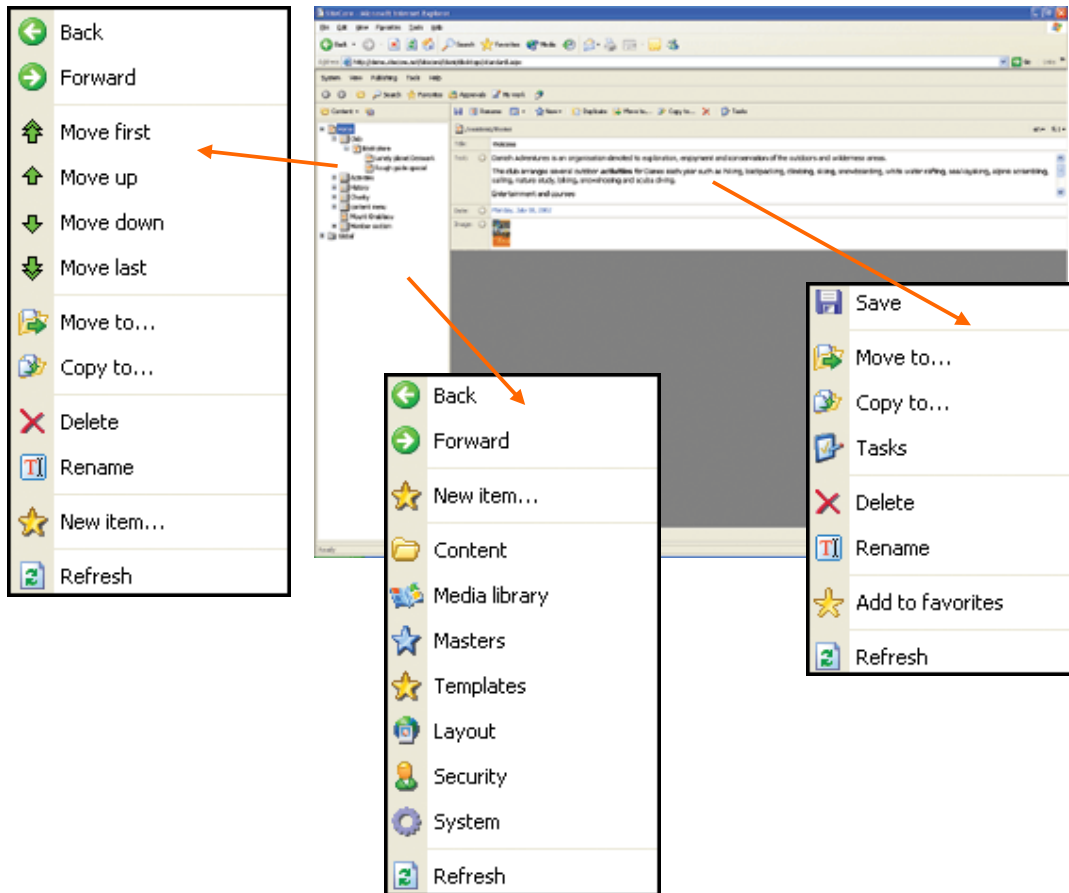
You may keep several versions of the same document. All versions may be viewed and new versions may be created.

By selecting “View list” at the bottom of the dropdown menu an interface opens up where you may create and delete versions.















H Right click menus












There are various right click menus which appear when you right click on the mouse. Depending on where you right click, the menu of the given area appears.







H.1 Right click on document







Menu items when right clicking on document		
	Back	Work in the same manner as the back and forward buttons of the Internet Explorer. This way it is possible to click your way back and forth in previously marked documents.
	Forward	
	Move first	Moves the marked document first in the list of documents in the area where the document is located.
	Move up	Moves the marked document up one place.
	Move down	Moves the marked document down one place.
	Move last	Moves the marked document last in the list of documents.
	Move to...	Moves the marked document. A dialogue box appears, and you may select where you wish to move the document in the tree structure.
	Copy to...	Copies the marked document. A dialogue box opens up and you may select where you want to insert the new document in the tree structure. The new document is a copy of the marked document. If it has any sub items these will also be copied.
	Delete	Deletes the marked document. A warning box always opens up, and you have the possibility to abort.
	Rename	Renames the document. An input box opens up where you may write the new name.
	New item...	This is used for inserting new documents directly from a template. In a dialogue box you select the type of template you want to base the document on.
	Refresh	Is used to refresh the tree structure.

H.2 Right click under the tree structure

Menu items when right clicking under the tree structure		
	Back	Work in the same manner as the back and forward buttons of the Internet Explorer. This way it is possible to click your way back and forth in previously marked documents.
	Forward	
	New item...	This is used to insert new documents directly from a template. In a dialogue box you select the template on which the document should be based.
	Content	You switch to the content tree.
	Media library	You switch to the tree structure of the images stored in SiteCore.
	Masters	You switch to the masters tree.
	Templates	You switch to the template tree.
	Layout	You switch to the layout.
	Security	You switch to the security tree.
	System	You switch to the tree for system settings.
	Refresh	This is used to refresh the tree structure.

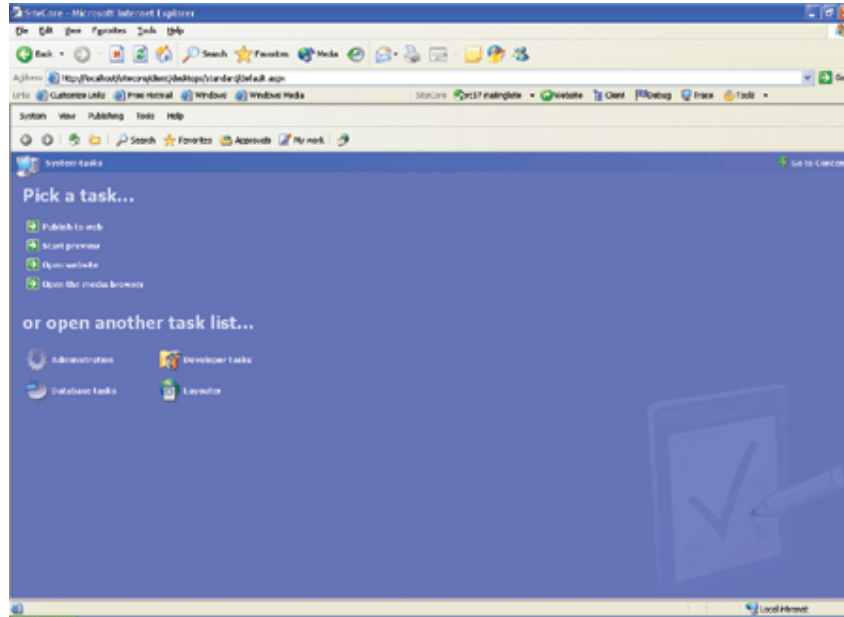
H.3 Right click in the field area

Menu items when right clicking on the field area		
	Save	Saves changes to the document.
	Save as a new version	Saves changes in a new version of the document.
	Publish this item	Publishes the marked document and all sub items.
	Move to...	Moves the marked document. A dialogue box appears and you may select where to move the document in the tree structure.

	Copy to...	Copies the marked document. A dialogue box opens up and you may select where you want to insert the new document in the tree structure. The new document is a copy of the marked document. If this has any sub items these will also be copied.
	Tasks	Shows an interface with all the document options.
	Delete	Deletes the marked document. A warning box always opens up, and you have the possibility to abort.
	Rename	Renames the document. An input box opens up where you may write the new name.
	Add to favourites	Adds the document to “Favourites”.
	Refresh	This is used to refresh the field area.

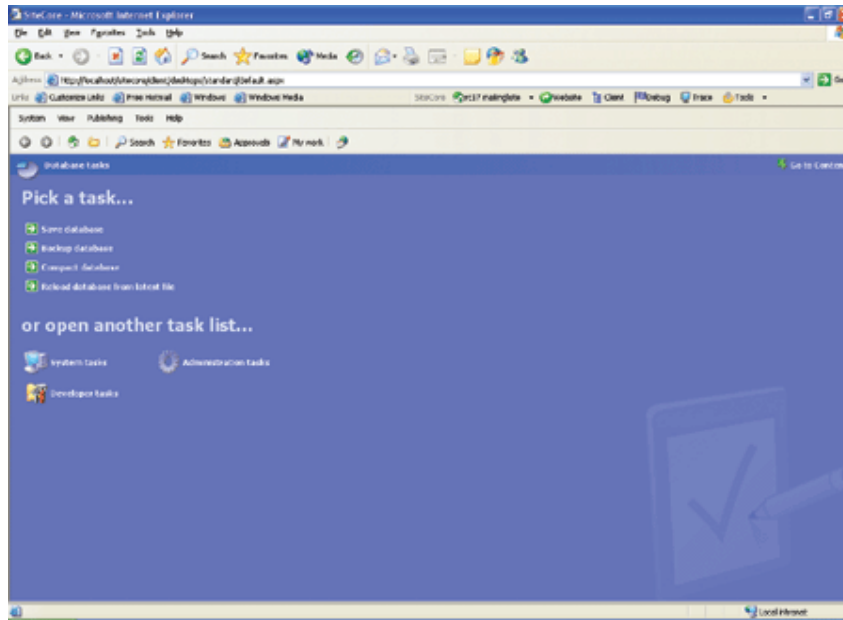
I Task interfaces

I.1 What can I do in the “System tasks” interface?



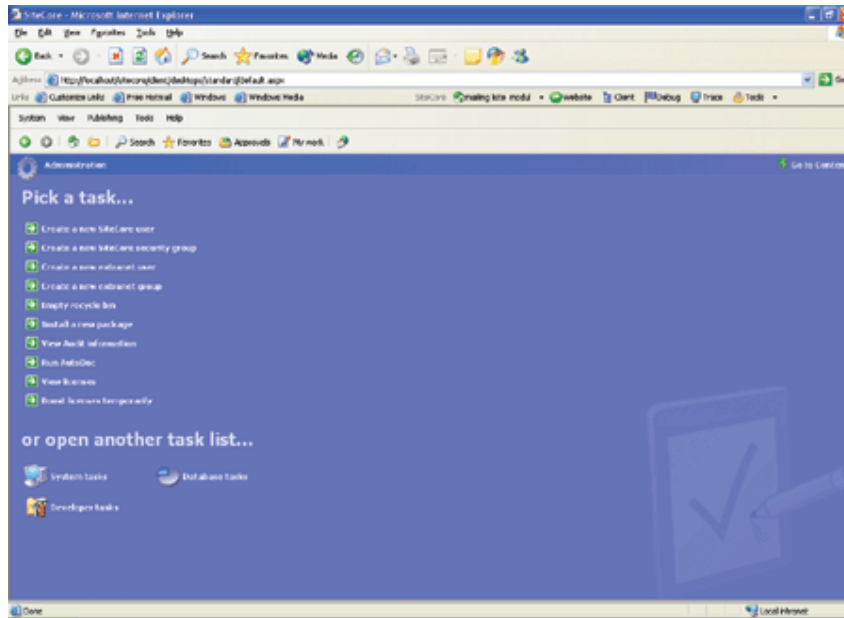
System tasks	
Publish to web	Published to website.
Start preview	Opens a new interface where you may preview your website. The website is shown with “content markers” so you may edit the content in this view.
Open website	Opens a new browser where the website can be viewed.
Open the media browser	Opens a dialogue box in the media library. Here you may save images which later may be inserted in your documents.

I.2 What can I do in the “Database tasks” interface?



Database tasks	
Save database	Saves the database.
Backup database	Copies the database.
Compact database	Cleans up the database.
Reload database	Fetches the latest saved copy of the database from latest file.

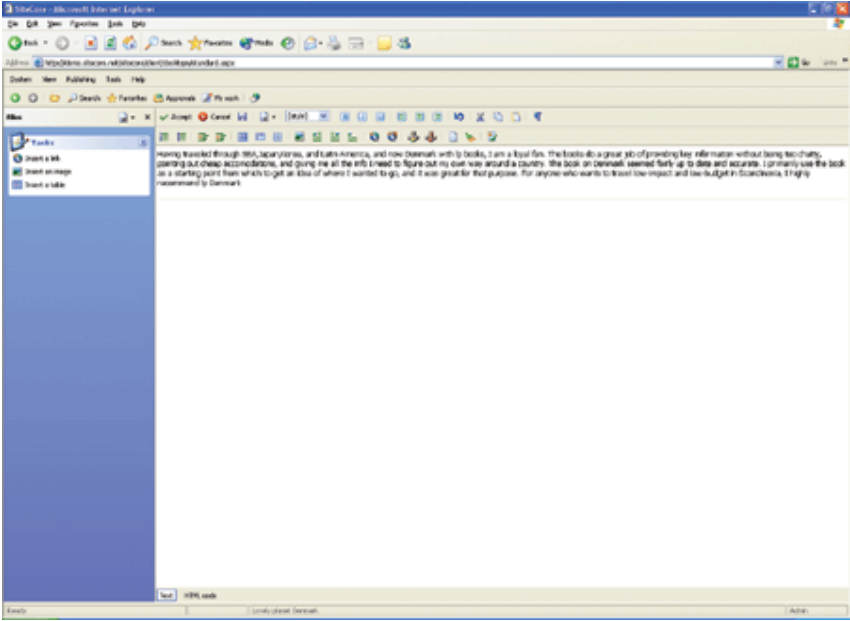
I.3 What can I do in the "administration tasks" interface?



Administration tasks	
Create a new SiteCore user	Creates a new SiteCore user.
Create a new SiteCore security group	Creates a new SiteCore user group.
Create a new extranet user	Creates a new extranet user.
Create a new extranet group	Creates a new extranet user group.
Empty recycle bin	Empties the recycle bin. Deletes all documents located in the recycle bin.
Install a new package	Installs new modules for your solution.
View audit information	View information concerning changes in SiteCore.
Run "Autodoc"	Opens up documentation to all areas of SiteCore.
View licenses	Shows the purchased licenses.
Boost licenses	The option to buy temporary user licenses. These licenses are valid for 24 hrs, and may be used if you need more users in periods than the number of licenses you have.














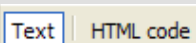
J The possibilities of the HTML editor

An HTML editor behaves slightly different than a text processing program e.g. Word. Most icons resemble those known from Word and work in the same way. There are a few extra icons which require getting used to.



HTML Editor Icons		
	Accept	Saves changes and close the HTML editor.
	Cancel	Closes the HTML editor without saving changes.
	Save	Saves changes.
	Tasks	This icon has a list of icons to the various menu bars you may select to open in the left side of the interface. These menu bars may be closed by clicking on the "X" in the upper right corner. From these menus you may draw various elements into the HTML editor. The various menus will be explained below.

	Styles	Various options concerning format type of the text. This function works in the same way as when selecting headings in Word. The format of the various types is decisive for the design and is set up by the programmer.
	Bold	Bold font
	Italic	Italic font
	Underline	Underlined font
	Colour	By clicking on this icon, a colour palette appears from which a colour for the text may be selected.
	Justify left	Aligns the text to the left.
	Justify centre	Centres the text.
	Justify right	Aligns the text to the right.
	Undo	Undo the latest typing.
	Cut	Cuts
	Copy	Copies
	Paste	Inserts the copied or cut section.
	Show all tags	Shows the tags in the text area. This icon contains an extra feature which needs installing by the user. This is very simple, the only thing required is to be especially attentive to close the Internet Explorer, and reopen it before being able to use the newly installed functionality. To fully benefit from this functionality, knowledge of HTML is necessary
	Numbered list	Creates a numbered list.
	Bulleted list	Creates a bulleted list.
	Increase indent	Makes an indent in the text.
	Decrease indent	Moves back the text.

	Insert table	Opens a side menu bar from where you may insert tables. You may also select various properties for the tables. This icon may also be used if you want to edit an existing table.
	Toggle design	Is used by developers.
	Insert image	Inserts an image. A dialogue box opens from where you may insert an image and then select various properties applying to the image.
	Align image left	Aligns the image to the left. If you mark an inserted image you may then select to align the image to the left or to the right.
	Align image right	Aligns the image to the right.
	Remove image alignment	Removes all previous settings concerning a image alignment
	Insert Link	Inserts a link. A dialogue box appears from where you may select the type of link you wish to insert, where you want to link to and other settings.
	Remove link	Removes previously created links
	Insert anchor	Inserts an anchor. An input box appears where you may enter the name of the anchor.
	Remove anchor	Removes a previously created anchor.
	Clear all content	Deletes everything in the text field. By using this icon you ensure that all text and previous formats have been erased.
	Remove formatting tags	Deletes formats to text (bold, italic and underlined).
	Clean HTML	If you copy from Word, this icon may be used to "clean" the text. It ensures that all superfluous is deleted in order to leave a clean HTML.
	Text/HTML code tab	You may choose to view the code of the text by changing the editor to HTML code.