

Squiz Matrix User Manual Library

The Squiz Matrix User Manual Library is a prime resource for all up-to-date manuals about Squiz's flagship CMS

Easy Edit Suite Current for Version 4.8.1

Installation Guide

This guide will help you install the *Easy Edit Suite* on your Squiz Matrix System.

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This guide assumes that you are installing Squiz Matrix into `/home/websites/` - please make adjustments to commands as required.

You cannot use both the *Easy Edit Suite* and a *Simple Edit Interface* on a single *Design* file.

If you have added the *Easy Edit Suite* to a *Design* and need to remove it, refer to the [Removing the Easy Edit Suite From a Design](#) section in this chapter.

For previous releases of the *Easy Edit Suite*, refer to the [Installation Guide](#) for EES Phase 1 (Squiz Matrix 3.28.0 to 3.28.2) and Phase 2 (Squiz Matrix 3.28.3 to 4.4.0).

If you have already installed the *Easy Edit Suite* on your system and require information on upgrading your version, refer to the [Upgrade and Compatibility Guide](#) chapter in this manual.

Downloading the Easy Edit Suite to your Server

Running the following commands will download a copy of the latest stable version of the *Easy Edit Suite* using `wget` and unpack it in to the `matrix/data/public` folder. If you are not using the command line you can [download EES from the Squiz Suite website](#).

The downloaded file will contain a version number, so be sure to replace `[version]` with the current version number in the commands below. If the downloaded version does not match your Squiz Matrix version, please download a different copy from the [archived download page](#) on the Squiz Matrix web site.

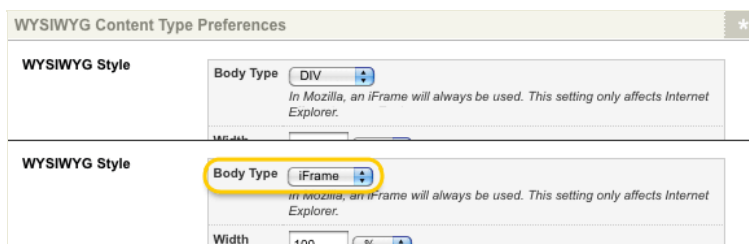
```
$ cd /home/websites/matrix/data/public
$ wget http://matrix.squizsuite.net/ees.tar.gz
$ tar -zxf ees_[version].tar.gz
$ rm ees_[version].tar.gz
```

Changing Global Preferences

The Easy Edit Suite requires that the *WYSIWYG Style - Body Type* option be set to *iFrame*. Please note that this change will not affect current WYSIWYG usage.

To set this option:

1. Click on the *System Configuration* button on the top right hand corner of the *Administration Interface* - a drop-down list will appear under this icon. From this list select *Global Preferences*. The *Global Preferences* screen will appear.
2. Acquire the lock(s) on the *Global Preferences* screen and locate the *WYSIWYG Content Type Preferences* section, as shown in the figure below.



The WYSIWYG Content Type Preferences section of the Global Preferences screen

3. In the *Body Type* field of the *WYSIWYG Style* options, select *iFrame* from the drop-down list, as highlighted in the figure above.
4. Click *Commit* to save this change.

The Javascript API

A *Javascript API* asset needs to be created for the *Easy Edit Suite* to communicate with the Squiz Matrix system.

Creating the Javascript API and Setting Permissions

To create the *Javascript API*:

1. Right click on the *Web Services Folder* in the *Asset Map* and select *New Child -> Web Services -> JavaScript API*.
2. Enter the name **Easy Edit Suite** for the asset and click *Commit*.
3. Right click on the *Javascript API* and select *Permissions*.
4. Acquire the lock(s) on the page and, under the *Read Permissions* section, select *Deny* for *Public Permissions*.
5. Apply *Read Permission* to the *Users* and *User Groups* that will have access to the *Easy Edit Suite*.
6. Click *Commit* to save this change.

Configuring the Javascript API

On the *Details* screen of the **Easy Edit Suite** *Javascript API*, change the following fields:

- **Status:** set the *Status* of the *Javascript API* to *Live*.
- **Root Nodes:** select the *Site* assets that are to use the *Easy Edit Suite*. This should include the root nodes of any assets that are to be editable on the *Easy Edit Suite* that may not be located under a *Site*, such as *File* or *Image* assets linked under the *Media Folder*.
- **Allow Attributes on Create:** select *Yes*.
- **Return JSON:** select *Yes*.
- **Ignore Permissions:** select *No*.
- **Use Enhanced JS API:** select *Yes*.
- **Allow Batching Requests:** select *Yes*.
- Enable all the API functions in the **Core, Linking, Permissions, Workflow, Traversing and Metadata** sections.

Once you have made these changes, click *Commit*.

Tip: Keep a note of the *API Key* that is displayed on this screen while you are editing. You will need it later in the installation process.

Applying URLs

Each *Site* with a unique URL that is to use the *Easy Edit Suite* will require their URLs to be applied to various locations. This will ensure that there are no cross domain conflicts with the EES JavaScript calls to the *Javascript API* asset.

Upon first installing the *Easy Edit Suite* and/or adding new *Site* assets to use the *Easy Edit Suite*, check the following:

- The new URL(s) has been applied to the *Site* asset.
- The new URL(s) has been applied to the *Designs Folder*. Please note that if you are using an alternate design configuration to control your *Site's* design, then ensure the new URL(s) are applied to the relevant parent asset instead.
- The new URL(s) has been applied to the *Web Services Folder*. Please note that if your EES *Javascript API* is not located under the *Web Services Folder*, you will need to apply the URL(s) to the relevant parent asset instead.

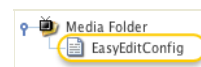
Tip: Remember to maintain the URL format of system folders when applying the URL of your *Site*. For example, if the URL of your *Site* is <http://www.example.com>, you would apply this URL to the *Designs Folder* as http://www.example.com/_designs and to the *Web Services Folder* as http://www.example.com/_web_services.

Constructing the Configuration File

The *Easy Edit Suite* assumes the presence of a configuration file containing JSON. A template of this configuration file can be found in `<easy_edit_system_root>/Examples/EasyEditConfigSample.js`.

To set up an editable configuration file inside your system, locate an accessible location inside Squiz Matrix.

1. Create a *JS File* asset, naming it *EasyEditConfig*, as shown in the figure on the right.
2. Edit the file and save the content sourced from the *EasyEditConfigSample.js* file.
3. On the *Permissions* screen, acquire the lock(s) on the page and, under the *Read Permissions* section, select *Deny* for *Public Permissions*.
4. Apply *Read Permission* to the *Users* and *User Groups* that will have access to the *Easy Edit Suite*.
5. Change the status of the file to *Live*.



The configuration file

Tip: Go to the [Web Paths](#) screen of the file and take note of the URL displayed there as you will need it later in this guide. This path will vary depending on the location of the file in the system. If this file has been created underneath the system's *Media Folder*, as per this example, its URL will be in the format `/_media/EasyEditConfig.js`.

Configuration Options

You can set a number of configuration options on the *Easy Edit Suite's* configuration file:

- **debug**: set this option to either **true** or **false** to tell the system if it is allowed to perform debugging operations. If this option is set to **true**, debugging information will be logged to web developer diagnostic tools (e.g. FireBug's console tab).
- **titleBar**: this text will be shown in the title bar of the browser. Use the keyword replacement `@asset_name@` to use the name of the asset in the title bar.
- **lockRefreshInterval**: this option determines how often the system should re-acquire locks for the currently active screen. The default value for this option is **120** seconds, the system default. This should be altered to match the current system's lock refresh interval, if it has been changed.
- **baseSiteUrls**: this option allows you to specify an array of base site URLs for the *Easy Edit Suite*. Please note that, for the majority of systems, this configuration will not be necessary.
- **JSAPI -> key**: this option must contain the *API Key of the Javascript API*, as shown in the figure below. This key is obtained on the details screen of your **Easy Edit Suite Javascript API**. If the *API Key* at any time changes, the configuration file will need to be updated.

```
// in stale data if users are likely to be editing the same asset
assetScreenCache:      false,

// JS API configuration options
JSAPI: {
  key:                  "11111111",
},

// Suffixes for matrix urls - This needs to match matrix system c
// values
editSuffix:            " edit".
```

Setting the API Key in the configuration file

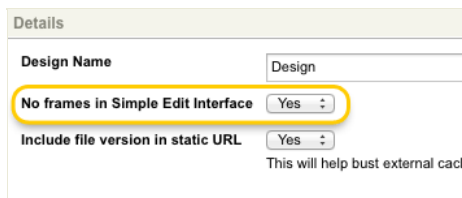
- **Suffixes**: a representation of the suffixes found in the Squiz Matrix *System Configuration* menu. If these suffixes are not using the system defaults, the values should be reflected in this option.
- **cascadeThreshold**: at times, the *Easy Edit Suite* will warn editors if they are about to affect a large number of assets. This number is determined in this option. A high value will result in less warnings for users but could potentially result in users unwittingly cascading changes across large sections of the system, resulting in failed actions or stale hipo jobs.
- **overlayTimeout**: when the loading animation is presented to an editor, it is generally waiting on a response back from the server. The action the editor is performing may result in a failed request on the server (due to memory exceeding, execution timeouts, database errors etc.). This option sets a timeout (in seconds) after which a warning will be displayed to the editor informing them that their request may have failed. Editors will have the option to continue with the request or cancel the request, which will reload the current asset in the editing interface.
- **defaultMode**: this option allows you to specify the default mode to display when the *Easy Edit Suite* is first loaded. The options available are either **edit** (*Edit Mode*) or **preview** (*Preview Mode*). By default, this option will be set to **edit**.
- **defaultScreen**: this option allows you to set the default edit screen to display when *Edit Mode* is initially loaded. For example, setting this option to **content** will load the *Content* screen when *Edit Mode* is first accessed. By default, this option is set to **details** (the *Details* screen).
- **showDifferencesInPreviewMode**: when the *Easy Edit Suite* is in *Preview Mode*, an asset that has a *Status* of *Safe Edit* can compare its content against the *Live* version of the asset. This configuration option allows you to enable this comparison when an asset is in *Preview Mode*. By default, this option is disabled, meaning that a comparison will not automatically be displayed for *Safe Edit* assets. Instead, a *Compare to Live* button will be shown, allowing users to manually enable the content comparison. For more information, refer to the [The Easy Edit Suite](#) chapter in this manual.
- **assetFinderCacheEnabled**: this option allows you to cache the *Asset Finder* results. By default, this option is set to **true**.
- **assetFinderLocations**: this option allows you to specify an array of custom root nodes to be listed on the *Asset Finder*. For more information on this option, refer to the [Asset Finder](#) chapter in this manual.
- **assetFinderMaxAssets**: this option allows you to specify the number of children to display under each asset in the *Asset Finder* before pagination occurs. By default, this option is set to **100** assets, meaning that only up to 100 assets will be displayed as children of each asset in the *Asset Finder*. Assets with more than 100 children will provide users with pagination tools to display any remaining children. Setting this field to **0** will remove pagination from the *Asset Finder* and display all child assets, irrespective of the amount.
- **cacheManagerDefaultExpiry**: certain information in the *Easy Edit Suite* is cached to improve performance. This configuration option allows you to set the expiry time (in minutes) for information stored in cache. By default, this option is set to **2** minutes.
- **useThumbnail**: this option allows you to enable the *Thumbnail* settings on the *Details* screen of assets. If this option is set to **false**, the *Thumbnail* section will not be displayed and these settings will not be available to users. By default, this option is set to **true**.
- **allowFutureStatusChange**: this option allows you to enable the *Future Status* settings on the *Details* screen of assets. If this option is set to **false**, the *Future Status* section will not be displayed and these settings will not be available to users. By default, this option is set to **true**.
- **showChildrenOnLinkingScreen**: this option allows you to enable the *Direct Children* settings on the *Linking* screen of assets. If this option is set to **false**, the *Direct Children* section will not be displayed and these settings will not be available to users. By default, this option is set to **true**.

Adding the Easy Edit Suite to your Design's Parse File

To use the *Easy Edit Suite* on a *Site*, the *Parse File* of the *Site's Design* must be edited.

To do this:

1. Locate the *Design* of the *Site* in the *Asset Map*. Right click on the *Design* and select *Details*.
2. Acquire the lock(s) on the *Details* screen. Locate the *Details* section of the screen and in the *No Frames in Simple Edit Interface* field, select *Yes*, as shown in the figure below. Click *Commit* to save this change.



The No Frames in Simple Edit Interface field

3. Right click on the *Design* and select *Edit Parse File*. Acquire the lock(s) on the page.
4. At the very top of the parse file, before any other code, add the following:

```
<MySource_AREA id_name="exit_area" design_area="exit" print="no"></MySource_AREA>

<MySource_AREA id_name="nested_EES_code" design_area="nest_content" print="no" />

<MySource_AREA id_name="simple_edit_EES" design_area="show_if">

  <MySource_SET name="condition" value="simple_edit_mode" />

  <MySource_THEN>

    <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd" >
    <html xmlns="http://www.w3.org/1999/xhtml" xml:lang="en" lang="en">
      <head>

        <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />

        <!-- EES install and implementation help: http://manuals.matrix.squizsuite.net/ees/chapters/installation -->

        <!-- The title tag is dynamically replaced by EES code, see your EES config.js file to customise -->
        <!-- Related install step: http://manuals.matrix.squizsuite.net/ees/chapters/installation/#Constructing-the-Cor
        <title>Loading Easy Edit Suite...</title>

        <!-- Use a nested standard page (set to raw html) for custom CSS and JS file references. Avoids editing design
        <MySource_PRINT id_name="nested_EES_code" />

      </head>
      <body></body>
    </html>

    <MySource_PRINT id_name="exit_area" />

  </MySource_THEN>

</MySource_AREA>
```

5. Click *Commit* to save this change.

Setting Up the EES Styles and Scripts Nested Standard Page

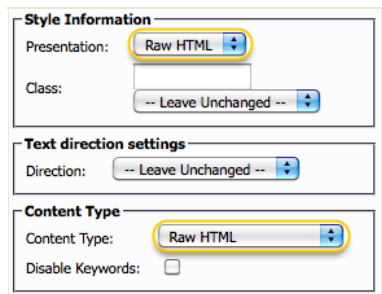
To setup the *Easy Edit Suite* on a *Site*, an **EES Styles and Scripts** *Standard Page* must now be created.

The content of this *Standard Page* will contain the *Easy Edit Suite* code, along with any other custom CSS styles and JavaScript code.

This *Standard Page* is then nested in the *Design* of your *Site*.

1. Create a new *Standard Page* called **EES Styles and Scripts**.
2. Make the *Standard Page* asset *Live* with public read access.
3. On the *Edit Contents* screen, edit the properties of the default *WYSIWYG Editor Content DIV*, changing the *Presentation* and *Content Types* to *Raw HTML*, as shown in the figure to the right.
4. In the new *Raw HTML Division*, add the following:

```
<!-- Easy Edit CSS -->
<link href="/_data/ees/easyedit.min.css" rel="stylesheet" type="text/css" media="screen" />
```



Setting the Raw HTML DIV

```

<!-- Squiz Matrix / Easy Edit JS API (replace with correct file path to JS API within web services folder, file path may vary) -->
<!-- Related install step: http://manuals.matrix.squizsuite.net/ees/chapters/installation#The-Javascript-API -->
<script type="text/javascript" src="/_web_services/xxxx.js"></script>

<!-- jQuery Files Required -->
<script type="text/javascript" src="/_data/ees/Libs/jquery/jquery-1.6.2.min.js"></script>
<script type="text/javascript" src="/_data/ees/Libs/jquery/jquery-ui-1.8/ui.custom.min.js"></script>
<script type="text/javascript" src="/_data/ees/Libs/jquery/jquery/jquery-ellipses.js"></script>
<script type="text/javascript" src="/_data/ees/Libs/jquery/validate-1.6.0/jquery.validate.min.js"></script>
<script type="text/javascript" src="/_data/ees/Libs/jquery/jquery.ba-bbq.min.js"></script>

<!-- Easy Edit Configuration (replace with correct file path, file path may vary per implementation) -->
<!-- Related install step: http://manuals.matrix.squizsuite.net/ees/chapters/installation#Constructing-the-Configuration-File -->
<script type="text/javascript" src="/_media/xxxx.js"></script>

<!-- Easy Edit Core Scripts (path to install directory within data/public/) -->
<script type="text/javascript" src="/_data/ees/easyedit.min.js"></script>
    
```

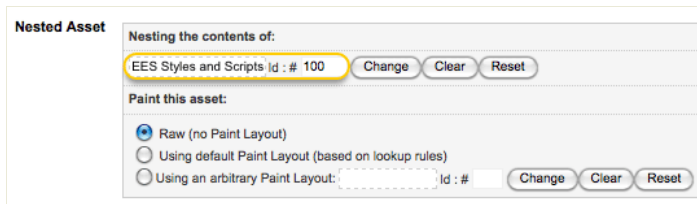
5. Edit the URL under the heading *Squiz Matrix / Easy Edit JS API*. Ensure this path matches the location of the JS API asset you created earlier.
6. Edit the URL under the heading *Easy Edit Configuration*. Ensure this path matches the location of your EES configuration file asset.

Tip: You can use this [Standard Page](#) to add custom CSS styles and JavaScript code to override existing EES styles, for example, use different screen tab background images, toolbar button images etc. For more information, refer to the [CSS Customisation](#) and [JavaScript Plugins](#) chapters in this manual.

7. On the *Details* screen of the base level (direct children) *Customisation(s)* of your *Site's Design*, customise the **nested_ees_code** design area.

Tip: If there are no existing *Customisations* on your *Design*, create a new *Design Customisation* on the *Customisations* screen.

8. On the *Details* screen of the customised design area, select the **EES Styles and Scripts** *Standard Page* asset in the *Nested Asset* field.



Nesting the EES Styles and Scripts Standard Page

The *Print* setting on the **Custom Styles and Scripts** design area should be set to **No**.

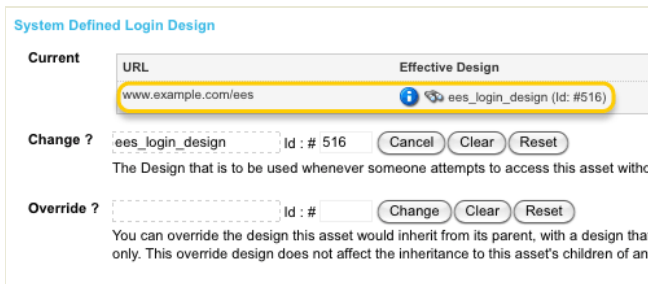
9. Apply the *Design Customisation* to your *Site*.

Setting the Easy Edit Suite Login Design

A *Login Design* is available for the *Easy Edit Suite* to maintain a consistent look and feel for users.

To apply the *Login Design*:

1. Right click on the *Site* that you have configured the *Easy Edit Suite* for and select *Settings*.
2. Acquire the lock(s) on the *Settings* screen and locate the *System Defined Login Design* section, shown in the figure below.



The System Defined Login Design section

3. Select the *Change* button in the *New?* field (titled *Change?* if a *Login Design* is already applied).

4. Locate the *ees_login_design* asset (located in the *System Design Folder*), right click on it and select *Use Me*.
5. Click *Commit* to save this change.

Removing the Easy Edit Suite from a Design

To remove the *Easy Edit Suite* from a *Design*:

1. Acquire the lock(s) on the *Edit Parse File* screen of the *Design* file.
2. Remove the *Exit Design Area* from the top of the parse file and click *Commit*. This will remove references to the EES in the parse file of the *Design*.
3. Acquire the lock(s) on the *Details* screen of the *Design* file.
4. In the *No Frames in Simple Edit Interface* field, select *No* and click *Commit*.

The *Easy Edit Suite* will now be removed from your *Design*.

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