

Server Setup Guide

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Creation Date and Time: June 2, 2010 1:46 PM



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Server Setup Guide

Server Setup Guide

Doc363: April 29, 2008 11:55 AM, Posted and Edited by Christopher Nuzum

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Server Setup

Doc249: March 22, 2008 4:17 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

In *Server Setup*, you can shutdown or restart the server, change journals, add and deactivate users and projects, change network settings, apply email settings, modify server preferences, and set up custom label actions.

You must have Server Setup permission to access Server Setup.

To access Server Setup, click the Server Setup link in the sidebar.



Server Name

Doc248: March 22, 2008 4:17 PM, Posted by Documentation Importer

Name Your Server and your Journal



Server Name

This name will be displayed in server setup to identify your server. If you administer multiple servers, this can remind you which one you are currently looking at.



The Server Name appears in the setup screens.



It's most useful in helping people who administer several servers to distinguish which server's setup pages they are currently looking at.

Modify

Current Journal

Doc52: March 22, 2008 3:52 PM, Posted by Documentation Importer

Current Journal

The server can display only one journal at a time.







The Traction journal is the container that holds all the projects, users, articles, attachments, and shared files. Traction runs one journal at a time.

Modify

If you wish to switch to a different journal, or create a new journal, click the *Modify* button. This will take you to the Journal Setup Overview.

Modify User Directory

If you wish to change your current journal to work with a different User Directory (e.g. switching to LDAP or Active Directory, or switching from one of those to Traction's built-in User Directory), click the *Modify User Directory* button. For more information, see the section Changing User Directories and Migrating Principals.

Starting with Traction Release 3.5, it is possible to store attachments in a version controlled file system based on WebDAV. Click the button below to move your existing attachments into WebDAV and begin using the WebDAV store for all attachments. Important! The migration process will restart the Traction several times.

Begin Migration to WebDAV

If you are not currently using the WebDAV attachment store, you will see an additional section to the right of the main section. This section includes a *Begin Migration to WebDAV* button. Clicking this button will create a WebDAV attachment store and copy all your attachments into it. Depending on the number and size of attachments in your journal this procedure can take between several minutes and several hours, and will require a few server restarts. We recommend you run Traction as an application during this procedure, so you can monitor its progress. Visiting any Traction URL during migration will also give a web page showing percentage completed. To learn more about using WebDAV in Traction, see How is WebDAV Used in Traction TeamPage

The rest of this section gives configuration information about your journal.

Server Information

Doc246: March 22, 2008 4:16 PM, Posted by Documentation Importer



Server Information
Information about your Traction Server, the system it is running on, and the Java runtime it is using. Traction Version Information Version: 3.6 Beta 3.0 Version ID: 3,593 Journal Format 1.1 Meta Format: 27 System Information Running as User: cjn Server Directory: /Users/cjn/src/r36 Operating System: Mac OS X OS Version: 10.3.9 OS Architecture: ppc Free Memory (JVM): 391.1 MB Used Memory (JVM): 21.3 MB Total Memory (JVM): 412.4 MB Java Version Information Verdor

Verdor

Verdor

Location: RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Home

Ciasspath: J.Lsescijonisrch38:

(Iline breaks added for M. Jsescijonisrch38):

RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Homel/./Classes/jsse.jar.

RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Homel/./Classes/jsse.jar.

RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Homel/./Classes/jsse.jar.

RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Homel/./Classes/jsse.jar.

RystemulbranjiFrameworks/JavaVM.framework/Versions/1.4.2/Homel/./Classes/jsse.jar.

Alsersicinisrch38/hibpati.jar.

Alsersicin Version: 1.4.2_05 Vendor: Apple Computer, Inc. Location: /System/Library/Frameworks/JavaVM.framework/Versions/1.4.2/Home Ext Dirs: /Library/Java/Extensions: /System/Library/Java/Extensions: /System/Library/Frameworks/JavaVM.framework/Versions/1.4.2/Home/lib/ext Type: Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; .NET CLR 1.1.4322; .NET CLR 1.0.3705)



This section provides a great deal of information about your Traction server, the system it's running on, the Java subsystem it's using, and the browser you are using to visit the page. This information is valuable to support when diagnosing problems, and may optionally be included in feedback forms.

Event Listeners

Doc98: March 22, 2008 3:58 PM, Posted by Documentation Importer

Whenever an article (of any type) is posted to Traction, an event is generated. *Listeners* are plug-ins that can listen for these events and take any action.

Traction includes listeners for:

- Email notification
- Jabber instant message notification
 - Saving copies of Traction pages as static web pages.

Additional listeners can be written using Traction's Java SDK. For more information on creating custom listeners, see the Knowledge Base article How can I create a Listener that gets called when an entry is posted to Traction? (requires login).

To enable listeners, you must check the Enable checkbox.

Event Listeners Z Enable

The following event listeners are configured to run.

Each one corresponds to a properties file in the config/events/listeners directory. If no user is specified, the listener will run as the user that caused the event to fire

They can be invoked via a URL by specifying listener= [name], where [name] is the name of the listener listed in the table. A listener can be deactivated by renaming the file so that it doesn't end in ".properties" and clicking Clear All Caches.

The list of listeners currently configured appears below.

File	Name	Description	User	Events	Enabled
debugevent.properties	Debug Event Logger	Logs a message to Debug.event.		[*]	Image: Control of the
emailnotifier.properties	Email Notifier	Emails new or updated entries to a user according to various preferences.	*	[email, reclassify, post]	₽ ġ

Starting with version 3.7, listeners can be individually enabled and disabled using the checkboxes in the



last column.

How can I create a listener that updates a file with Traction view contents each time the server is updated?

The following reprint of the Knowledge Base article <u>Support1032</u>: <u>How can I create a listener that updates a file with Traction view contents each time the server is updated?</u> is provided for developers.

The Url2File listener lets you specify a set of Traction views and the files to which their content should be written. Each time an entry is added to one of the matching projects, all the pages are updated.

One use for this is to have a static RSS XML file updated each time an entry is added to Traction, so that every RSS view doesn't have to demand extra CPU from the server.

Like all listeners, as many instances as you like can be registered; each listener can update one or more files.

To create a notifier called myrssnotifier that updates an RSS feed, first, create a new file "myrssnotifier.properties" in config/events/listeners/.

Note: Line breaks are significant! In this annotated example, lines beginning with # are comments and all lines shown using this style must start with a keyword followed by an = sign at the beginning of a line.

Into this file, add the line:

tractionview=tsi.sdk.view.listener.Url2File

This line specifies the Url2File listener, which handles updating the files.

Next, fill in the information that will appear in Server Setup | General, where the notifier can be turned on and off.

display_name=My RSS Feed Updater

description=Writes out a static copy of the RSS views we care about

Now, decided who the notifier will run as. Since we're doing a public RSS feed, we'll only include entries visible to Visitor.

The user which this listener should run as. If unspecified, the listener runs as the

user who posted the entry which triggered the listener

user=Visitor

Now, determine which projects should trigger the notifier to create output. Pay special attention to the requirement for a | pipe character before and after each project in the list.

If set, updateprojects allows updates to happen only for the specified projects.

there must be a | before the first and after the last project; the server

checks for "|current project|" in the String below.

updateprojects=|Public|Comment|

If set, skipprojects prevents updates for the listed projects. Same syntax rules # apply as for updateprojects.



skipprojects=|Private|

Finally, you can give a list of Traction URL's and the files to which they should be written. Note that filenames are relative to the server directory. Also note that each of the url/file pairs has a number after it, starting with 0.

A list of urls and the files to which they should be published. all file paths are

relative to the server directory, and all URL paths are relative to the root.

url0 = /servlet/tsi. Submit?proj = Public&sdate = &edate = All&type = rchron&brief = y&skin = ajcrss&rsstitle = My%20 Public%20 Stufffer = v&skin = ajcrss&rsstitle = My%20 Public%20 Stuffer = v&skin = ajcrss&rsstitle = v&skin = ajcrs&rsstitle

file0=pub/publicrss.xml

url1=/servlet/tsi. Submit?proj=Comment & sdate=& edate=All & type=rchron & brief=y & skin=rss & rsstitle=Your % 20 Comments with the project of the projec

file1=pub/commentsrss.xml

Note there is one subtlety in the example above: the sdate= URL parameter has no value (is blank). This means "use now" for the start date.

Feed Manager

Doc112: March 22, 2008 4:02 PM, Posted by Documentation Importer

If your server is licensed to use the Feed Manager, this control will appear.

Feed Manager
☑ Enable Automatic Feed Ingestion

Traction can read RSS and Atom feeds and optionally post the
articles from those feeds to a Traction project.

Launch Feed Manager

You can turn on and off feed ingestion with the checkbox. The *Launch Feed Manager* button will take you to the interface where you can configure feeds. See Launching the Feed Manager for additional details.

Contact Link

Doc47: March 22, 2008 3:51 PM, Posted by Documentation Importer

Contact Link

This link will be used for the 'Contact Us' link appearing at the bottom of each page.

mailto:info@tractionsoftware.com

✓ Use the default value (mailto:info@tractionsoftware.com)



This section controls the destination of the *contact us* link that appears in the footer of Traction views.

You can change it to another mailto: URL, or to the URL of a web page. For example, setting the link to:

Contact Link

This link will be used for the 'Contact Us' link appearing at the bottom of each page.

http://www.tractionsoftware.com

Use the default value (mailto:info@tractionsoftware.com)

would point the contact link to Traction's public web site.

Note: It's important to include the URL protocol, e.g. mailto: or http:// at the front of the value you specify.

Feedback URL

Doc113: March 22, 2008 4:02 PM, Posted by Documentation Importer

Feedback URL

This is the URL of the script to which feedback forms should be posted.

http://www.tractionsoftware.com/cgi-bin/submitbug.pl

Use the default value (http://www.tractionsoftware.com/cgi-bin/submitbug.pl)

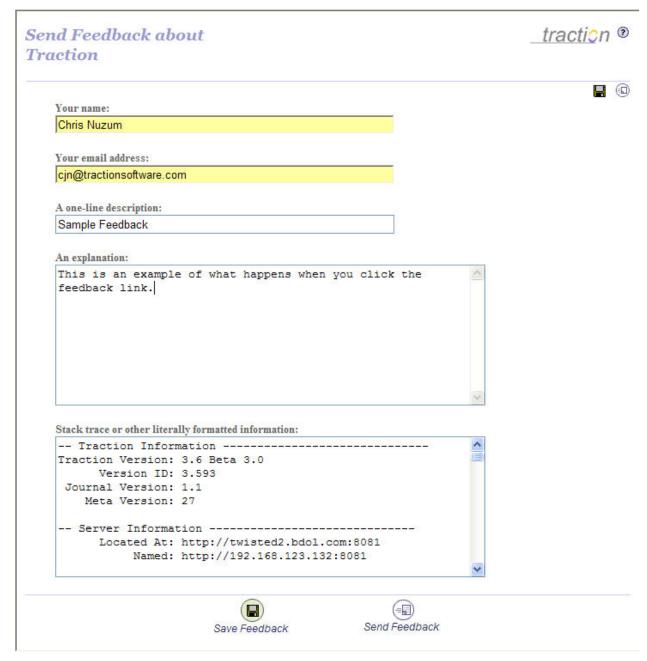
This link specifies the target of the feedback form. This is an HTML form that is posted by the Traction feedback page. The feedback page can be initiated by an error detected by Traction, or by clicking the feedback link in the page footer:

```
Geedback • contact us • help
Copyright © 2005 Two described Systems, Inc. All rights reserved.

Powered By traction
```

The feedback page lets people fill in an explanation of what happened, and includes details about their server that may be useful to support.





If you need to redirect the feedback form, contact support@tractionsoftware.com for sample CGI scripts for handling the feedback request.

Copyright Notice

Doc48: March 22, 2008 3:51 PM, Posted by Documentation Importer



Copyright Notice

This following copyright notice will appear at the bottom of each page. The {0} symbol will be replaced with the current date (e.g. 2005), or use the {1} symbol to display for a date range starting with the first article in your journal (e.g. 2002-2005).

Copyright © {0} Twisted Systems, Inc. All rights reserved.

✓ Use the default value (Copyright © {0} Twisted Systems, Inc. All rights reserved.)

This section lets you customize the copyright notice that appears in the page footer.

feedback • contact us • help Copyright © 2005 Twisted Systems, Inc. All rights reserved.

Powered By traction

The copyright holder defaults to the company name in your license.

The variable {0} is used to represent the current year.

The variable {1} is used to represent the range of years, starting with the first year in which content was posted to your journal, and ending with the current year. For example, filling in:

Copyright Notice

This following copyright notice will appear at the bottom of each page. The {0} symbol will be replaced with the current date (e.g. 2005), or use the {1} symbol to display for a date range starting with the first article in your journal (e.g. 2002-2005).

Copyright @ {1} Chris Nuzum

Use the default value (Copyright © {0} Twisted Systems, Inc. All rights reserved.)

results in the notice:

feedback • contact us • help Copyright @ 2002-2005 Chris Nuzum

Powered By traction'

Removing the Copyright Notice

To remove the copyright, set the Copyright Notice fields to blank.

Copyright Notice

This following copyright notice will appear at the bottom of each page. The {0} symbol will be replaced with the current date (e.g. 2005), or use the {1} symbol to display for a date range starting with the first article in your journal (e.g. 2002-2005).

Use the default value (Copyright © {0} Twisted Systems, Inc. All rights reserved.	ved.)
---	-------



This results in:

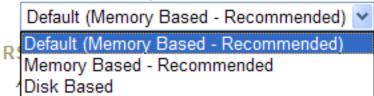
feedback . contact us . help

Powered By traction

Fulltext Index Implementation

Doc124: March 22, 2008 4:03 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Fulltext Index Implementation



We recommend that all Traction servers use the Memory Based fulltext index, which keeps the vocabulary in memory. The memory-based index also supports leading and trailing wildcards, e.g. *topher, Chris*. The disk-based index supports only trailing wildcards, e.g. chris*.

The disk based index requires mmap support that *is not stable on Windows* in versions of Java prior to 1.5. This often leads to full-text index update failures after rebooting without shutting down Traction cleanly (e.g. after an automatic Windows Update). When this happens, the fulltext index can fail to update until after complete Rebuild, Restart, and Shutdown has been performed (after which the index's contents are complete and correct).

Several earlier versions of Traction shipped defaulting to the disk-based index. We advise that all customers use this menu to change their settings to use the memory-based index.

RSS-to-HTML XSL Stylesheet

Doc229: March 22, 2008 4:14 PM, Posted by Documentation Importer

This setting lets you control the XSLT stylesheet referred to by Traction's RSS feeds.

RSS-to-HTML XSL Stylesheet

Allows you to specify your own XSL stylesheet for rendering RSS to HTML.

/html/xsl/rss2html.xsl

✓ Use the default value (/html/xsl/rss2html.xsl)

Traction's default stylesheet produces HTML views of RSS feeds that look like this:



This web page is actually a data file that is meant to be read by RSS reader programs.

[Back]

Traction Demo - All Projects Chronology

All Projects Chronology

The 36 items currently in this feed:

- 1. re: The Hubble Project Overview
- re: A concept paper for the new product
- Upscale, Downscale
- A Quest for Furniture With Nothing to Hide
 Day and Night, You Are the One
- A Garden's Future, in Glass Houses
- Realty Agents Add Elastic to Their Ethics
- What to Do With a Chunky Entertainment Center
- 9. Traction Software References
- 10. re: Traction Software References
- 11. re: Traction Software References
- 12. New Bulleted List
- 13. Other Ideas [convergence, FAQ, position]
- Traction Software References
- 15. 05/03/2005 Pentagon Hosts Country Music Stars Concert [important]
- 16. 04/28/2005 Armed Forces Full Honor Review and Award Ceremony for Deputy Secretary Wolfowitz [important]
- 17. 04/27/2005 Captain America and Spiderman Visit Pentagon [important]
- 18. Growing Up Denatured
- Francine du Plessix Gray: A Back Turned On the High Life
 Is Cork Making a Comeback?
- 21. A Pied-à-Terre Firmly Planted in the Seine
- 22. Roses, Playing Well With Garden's Others
- A Little Too Peaceful
- 24. 04/28/2005 Armed Forces Full Honor Review and Award Ceremony for Deputy Secretary Wolfowitz [important]
- 25. 04/27/2005 Captain America and Spiderman Visit Pentagon [important]
- Growing Up Denatured
- 27. Francine du Plessix Gray: A Back Turned On the High Life
- 28. <u>Is Cork Making a Comeback?</u>
- 29. A Pied-à-Terre Firmly Planted in the Seine
- 30. Roses, Playing Well With Garden's Others
- 31. A Little Too Peaceful
- re: I graduated from the 8a program. What contracts can I still bid on?
- 33. re: Need definition as to eligibility of an 8a during aguisition cycle
- 34. I graduated from the 8a program. What contracts can I still bid on? [FAQ]
- 35. re: Need definition as to eligibility of an 8a during aguisition cycle
- 36. Need definition as to eligibility of an 8a during aguisition cycle

[Back to the previous page.]

If you would like to use a different stylesheet, enter its URL in the box.

You can store your own stylesheets in the /html/xsl directory, but be sure to name the file uniquely; if you choose a filename used by Traction, your stylesheet will be overwritten on upgrade.



Atom-to-HTML XSL Stylesheet

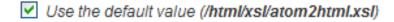
Doc15: March 22, 2008 3:46 PM, Posted by Documentation Importer

This setting lets you control the XSLT stylesheet referred to by Traction's Atom feeds.

Atom-to-HTML XSL Stylesheet

Allows you to specify your own XSL stylesheet for rendering Atom to HTML.

/html/xsl/atom2html.xsl



Traction's default stylesheet produces HTML views of Atom feeds that look like this:



This web page is actually a data file that is meant to be read by ATOM reader programs.

[Back]

Traction Demo - All Projects Chronology

The 36 items currently in this feed:

- 1. re: The Hubble Project Overview
- re: A concept paper for the new product
- Upscale, Downscale
- A Quest for Furniture With Nothing to Hide
- 5. Day and Night, You Are the One
- A Garden's Future, in Glass Houses
- 7. Realty Agents Add Elastic to Their Ethics
- 8. What to Do With a Chunky Entertainment Center
- Traction Software References
- re: Traction Software References
- 11. re: Traction Software References
- 12. New Bulleted List

- Other Ideas [convergence, FAQ, position]
 Traction Software References
 05/03/2005 Pentagon Hosts Country Music Stars Concert [important]
- 04/28/2005 Armed Forces Full Honor Review and Award Ceremony for Deputy Secretary Wolfowitz [important]
- 17. 04/27/2005 Captain America and Spiderman Visit Pentagon [important]
- 18. Growing Up Denatured
- 19. Francine du Plessix Gray: A Back Turned On the High Life
- 20. <u>Is Cork Making a Comeback?</u>
- 21. A Pied-à-Terre Firmly Planted in the Seine
- 22. Roses, Playing Well With Garden's Others
- A Little Too Peaceful
- 24. 04/28/2005 Armed Forces Full Honor Review and Award Ceremony for Deputy Secretary Wolfowitz [important]
- 04/27/2005 Captain America and Spiderman Visit Pentagon [important]
- Growing Up Denatured
- 27. Francine du Plessix Gray: A Back Turned On the High Life
- 28. Is Cork Making a Comeback?
- A Pied-à-Terre Firmly Planted in the Seine
- 30. Roses, Playing Well With Garden's Others
- A Little Too Peaceful
- 32. re: I graduated from the 8a program. What contracts can I still bid on?
- 33. re: Need definition as to eligibility of an 8a during aguisition cycle
- 34. I graduated from the 8a program. What contracts can I still bid on? [FAQ]
- 35. re: Need definition as to eligibility of an 8a during aguisition cycle
- 36. Need definition as to eligibility of an 8a during againstion cycle

[Back to the previous page.]

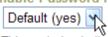
If you would like to use a different stylesheet, enter its URL in the box.

You can store your own stylesheets in the /html/xsl directory, but be sure to name the file uniquely; if you choose a filename used by Traction, your stylesheet will be overwritten on upgrade.



Enable Password RecoveryDoc91: March 22, 2008 3:57 PM, Posted by Documentation Importer

Enable Password Recovery



This controls whether users who forget their passwords are allowed to request that a password change URL be emailed to them. This URL is good for one hour. If an email address is entered, the ticket is mailed to that email address. If a Traction username is entered, the ticket is mailed to that account's preferred email address.

Traction's Password Recovery mechanism is described in the section What if you Forget Your Password

When enabled, the password form expands when a user clicks Forgot your Password? to provide a text box into which they can type their email address or account name. If a match is found in Traction, a change password link good for one hour is mailed to the corresponding email address.



Welcome to traction

Welcome to Traction. Please log in.

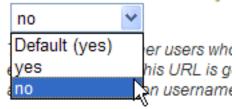
Us	ser
Pā	assword
	Remember me
Lo	ogin
	Login as Visitor
For	got your password?
Ent	er Username or Email address
a te tha use	ou enter a registered email address emporary password will be mailed to t address. If you enter your Traction ername, the password will be mailed your primary email address.
	Request Password

Deutsch | English | Français | 日本語



You can disable the password recovery features by setting this option to no.

Enable Password Recovery



This removes the "Forgot your password?" option from the login page.



Welcome to traction"

Welcome to Traction. Please log in.

Password	
Remember me	
Login	

Deutsch | English | Français | 日本語



Login Form OptionsDoc162: March 22, 2008 4:07 PM, Posted by Documentation Importer

Login Form Configuration Controls

You can click the various controls on the login form below to jump to the documentation for that control.



Welcome to traction

Welcome to Traction. Please log in.

Use	r.
Pass	sword
▼ (encode login with my IP Address more secure)
R	emember me
Laci	
Logi	
Lo	ogin as Visitor
	ogin as Visitor
Forgot	your password?
Forgot	
Enter	your password? Username or Email address enter a registered email address porary password will be mailed to
Enter If you a tem that a usern	your password? Username or Email address enter a registered email address

Deutsch | English | Français | 日本語



Encode Login with IP Address

Doc95: March 22, 2008 3:57 PM, Posted by Documentation Importer

Encode Login with IP Address Default (yes)

If yes, the IP address of a browser contacting the Traction server will be encoded in the login cookie. This will prohibit the exact cookie value from being used in a browser on a client with a different IP address. This will add additional security, but it may not work if the client is contacting the server through a router that uses identifies itself by different IP addresses.

If yes, the IP address of a browser contacting the Traction server will be encoded in the login cookie. This will prohibit the exact cookie value from being used in a browser on a client with a different IP address.

Note: This will add additional security, but it may not work if the client is contacting the server through a router that uses identifies itself by different IP addresses.

Show Checkbox on Login Form for Encode Login with IP Address

Doc267: March 22, 2008 4:19 PM, Posted by Documentation Importer

Show Checkbox on Login Form for Encode Login with IP Address Default (yes)

If yes, a checkbox will appear on the login form which allows the user to decide to have their Idon encoded with the IP address. The value for the Encode login with IP Address setting will serve as the default value for the checkbox. Allowing a user to decide will allow users connecting from behind certain routers to disable this feature.

If yes, a checkbox will appear on the login form which allows the user to decide to have their login encoded with the IP address. The value for the Encode Login with IP Address setting will serve as the default value for the checkbox. Allowing a user to decide will allow users connecting from behind certain routers to disable this feature.

Login form with checkbox:



Welcome to traction Welcome to Traction. Please log in. User Password Encode login with my IP Address Remember me Login Login as Visitor Forgot your password?

Deutsch | English | Français | 日本語

Login form without checkbox:





Welcome to Traction. Please log in.

If you would like to browse any public pages, you may log in as "Visitor"; no password is required.

Us	ser			
Pā	issword			
Lo	Remember n	ne		
	Login as Vi	sitor]	
Fore	qot your passv	vord?		

Deutsch | English | Français | 日本語



Default Login Cookie Lifetime

Doc61: March 22, 2008 3:54 PM, Posted by Documentation Importer



When using Traction's built-in authenticator, logins are maintained in a browser cookie that will expire either when the user closes their browser or when the user manually signs out.

This setting does not apply when using NTLM or LDAP X.509 authentication.

Show Remember Me Checkbox on Login Form

Doc276: March 22, 2008 4:20 PM, Posted by Documentation Importer

Show Remember Me Checkbox on Login Form Default (yes)

If yes, a checkbox will appear on the login form which allows the user to override the default choice selected using the Default Login Cookie Lifetime control (shown above).

If yes, a checkbox will appear on the login form which allows the user to override the default choice selected using the Default Login Cookie Lifetime control.

Clear Cache

Doc36: March 22, 2008 3:48 PM, Posted by Documentation Importer

Clear Cache

Most caches can be cleared by pressing button below. Some server configuration options require the server to be restarted to pick up changes.

Clear Caches

You can force Traction to clear its caches by clicking the Clear Caches button.

This will cause:

- All config files to be re-parsed. For example, you may need to do this after installing a new skin or custom view, listener, SDL tag, or other plug-in.
- Data (e.g. user profile information and group membership) cached from external directory servers to be flushed. The user's next access will refetch this information from the directory server. (Note: this cache is normally refreshed every five minutes)
- Cached Traction articles and other data structures to be flushed. As a result, the first few views after clearing caches may take slightly longer than normal to complete.

Page 36 of 291

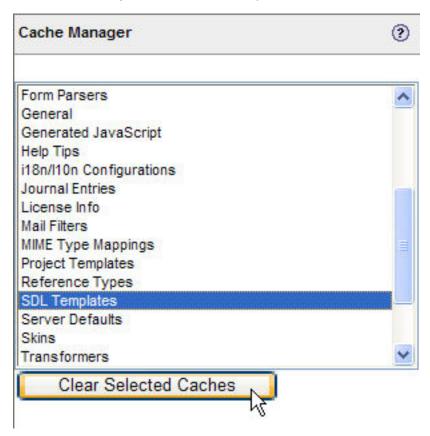


Java Garbage Collection, to release any memory being used by unreferenced objects.

In most cases, clearing caches is sufficient to cause a server configuration change to take effect. One notable exception is that the server must actually be Rebuild, Restart, and Shutdown for new locales to be added, or for modifications to existing locale files to take effect.

Cache Manager

Traction 3.7 and later include a special interface that lets you selectively clear caches. Type /cachemanager into the Rapid Selector search box to access the Cache Manager interface. You can select the caches you wish to clear, then press the "clear selected caches" button.



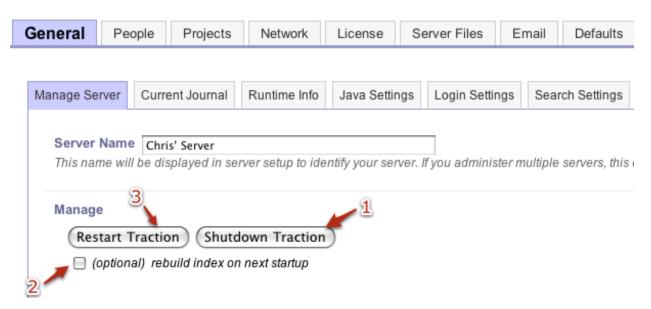
This can be used, for example, to force re-parsing of configuration files in order to install a new plug-in while not causing a large principal cache to be jettisoned.

Rebuild, Restart, and Shutdown

Doc232: March 22, 2008 4:15 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

You can rebuild, restart, and shut down from Server Setup > General.





How can I rebuild my TeamPage server's indexes?

If you get errors when you post articles, or if wiki page names don't seem to behave properly, your server may need to regenerate its indexes. This often happens as a consequence of a forced shutdown or power outage.

To rebuild the indexes, check the checkbox rebuild checkbox (2), and then press the restart button (3), and accept the confirmation dialog. When the rebuild completes, usually after a few minutes, your system should once again work properly.

How do I restart my TeamPage server?

If you need to restart your server, for example after installing or updating certain plug-ins, press the restart button (3), and accept the confirmation dialog.

How do I shut down my TeamPage server?

The best way to shut down the server is to press the Shutdown button (1).

Server Setup - People Tab

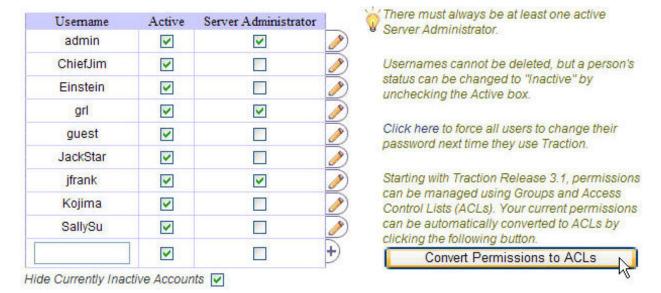
Doc257: March 22, 2008 4:18 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

In the People tab, you can *add*, *deactivate*, and *activate* user accounts. You can also launch the ACL and Traction Group editors, and convert old-style permissions matrices to ACL rules.

Converting Permissions to ACLs

If you have an older journal and would like to upgrade to Access Control Lists, press the Convert Permissions to ACLs button.

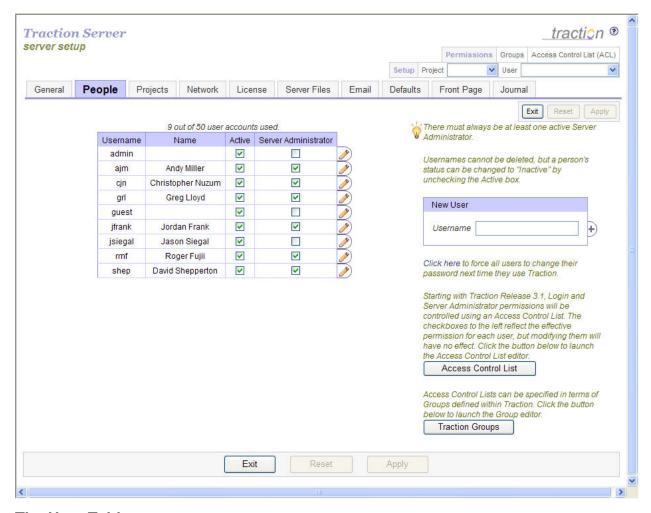




Overview of the People Page

Assuming you are configured to use ACLs, a typical People page looks like this:





The User Table

The table on the left lists all users. By default, inactive users are not displayed.



6	out	of	50	user	accou	nts	used
•	Out	0	-		account	1100	uvcu

Username	Name	Active	Server Administrator	
admin		~		1
ajm	Andy Miller	✓	✓	1
cjn	Christopher Nuzum	~	✓	1
grl	Greg Lloyd	✓	~	
guest		✓		
jfrank	Jordan Frank	✓	~	

Hide Currently Inactive Accounts

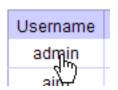
If you wish to show inactive users, un-check the checkbox below the table labeled "Hide Currently Inactive Accounts". This will reveal users who have been deactivated.

6 out of 50 user accounts used.

Username	Name	Active	Server Administrator	
admin		~		1
ajm	Andy Miller	~	~	1
cjn	Christopher Nuzum	~	~	(A)
grl	Greg Lloyd	~	~	1
guest		~		(A)
jfrank	Jordan Frank	~	~	1
jsiegal	Jason Siegal			1
rmf	Roger Fujii			1
shep	David Shepperton			1

Hide Currently Inactive Accounts

You can click a user's username to see that users' details. For example, clicking admin





shows a window summarizing user **admin**'s profile information. You can click the *Setup* link in this window to go to that user's Personal Information page.



The total number of active accounts allowed is controlled by your license. As users come and go, you may freely add, deactivate and reactivate their accounts. A user with an inactive account cannot log in, but all information relating to that user, including their preferences, is preserved.

To deactivate an account, un-check the checkbox in the Active column next to the username and press the *Apply* button.



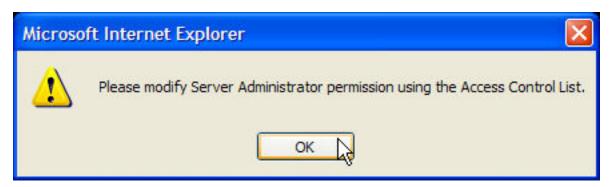
7 out of 50 user accounts used.

Username	Name	Active	Server Administrator	
admin		~		(A)
ajm	Andy Miller	~	✓	(1)
cjn	Christopher Nuzum	✓	✓	1
grl	Greg Lloyd	✓	✓	1
guest		~		1
jfrank	Jordan Frank	~	✓	1
jsiegal	Jason Siegal	✓		1
rmf	Roger Fujii		✓	1
shep	David Shepperton	4	~	1
		N		

If your license is limited to a specific number of user accounts, the number of active and available accounts is dynamically updated at the top of the table.

To reactivate the account, re-check the checkbox.

The Server Administrator column lists who has *Administer Server* permissions defined in the Server ACL. When using ACLs, you must use the Using the Server ACL Editor Intro to edit this information. If you try to click one of the checkboxes, Traction will remind you:



You can also click the pencil icon to the right of each row to jump to the user's Personal Information page.



9 out of 50 user accounts used.

Username	Name	Active	Server Administrator	
admin		~		JAK)
ajm	Andy Miller	~	~	
cjn	Christopher Nuzum	✓	~	1
grl	Greg Lloyd	✓	~	1
guest		~		1
jfrank	Jordan Frank	~	~	1
jsiegal	Jason Siegal	✓		
rmf	Roger Fujii	✓	~	1
shep	David Shepperton	✓	~	

Forcing All Users to Change their Password on their Next Login

To the right of the user table is a tip that includes a *Click Here* link. If you click this, all users will be required to select a new password the next time they access Traction.

Username	(+)

Click here to force all users to change their passive of next time they use Traction.

Starting with Traction Release 3.1, Login and Server Administrator permissions will be controlled using an Access Control List. The

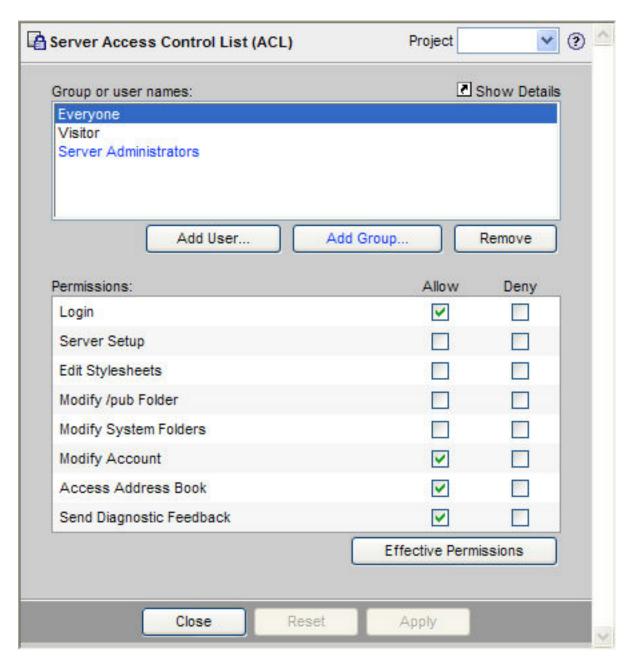
The Server ACL Editor Launcher

Access Control List

To launch the Server ACL Editor, click the Access Control List button.

The Access Control List will open in a new window.





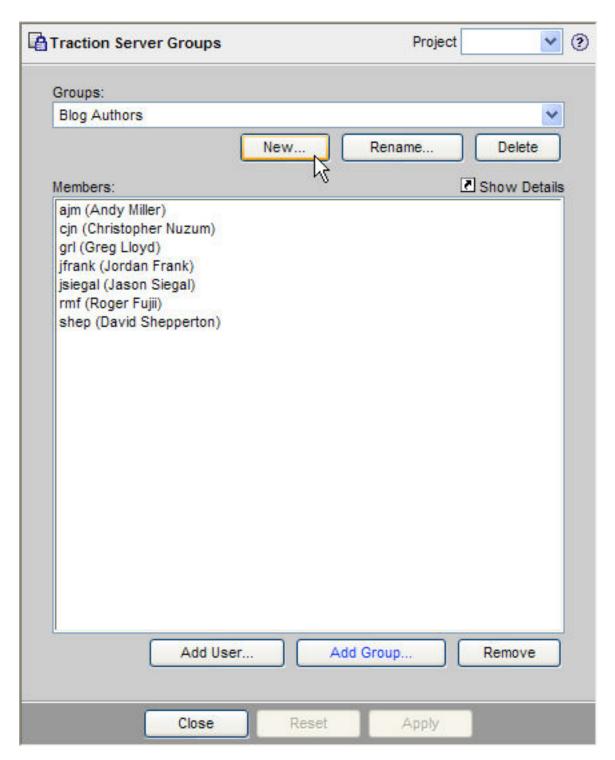
The Traction Group Editor Launcher

Traction Groups

To launch the Traction Group Editor, click the *Traction Groups* button.

The Traction Groups editor will open in a new window.



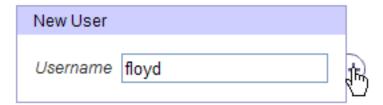


Adding a New User

To create a new user account, type a new username into the text input in the New User section in the



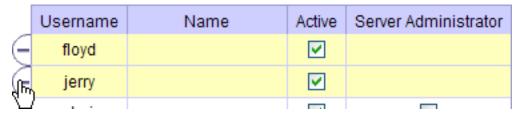
right column of the page, and click the +) icon. See below for user naming criteria.



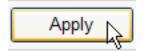
A new row is added for the new user. The actual account will not be created until you press apply.

	Username	Name	Active	Server Administrator
Θ	floyd		V	

You can add as many users as you like. To remove a user, click the (- icon.



When you are done, press the apply button.



The new user will be appear in the list sorted alphabetically.

cjn	Chris Nuzum	~	~	1
floyd		✓		1
grl	Greg Lloyd	~	~	1

Valid Usernames

Traction usernames must not include parentheses (), 'single' quotes, or "double" quotes.

These usernames are all valid:

- john.doe@mycompany.com
- JohnDoe
- John.Doe
- John_Doe
- John Doe
- johndoe
- jdoe



jdoe2

None of these usernames are valid:

- john'g'doe
- john"g"doe
- john(g)doe

Note that a username is a unique identifier used for login authentication. Each user's *full name* can be specified in Personal Information, and it is usually this full name that is displayed for other users to see.

Note: If you intend for a user to also have a personal project, it is nice if that personal project name matches the username (though it doesn't have to) to allow consistency and to support the "personal note" feature in the Context Menu which lets a person comment automatically into their own project, if one exists. In the case that you want a user name to match a personal project name, be sure to also obey project naming rules detailed in Server Setup - Project Tab when choosing a username.

Renaming Users

Once an account has been created, a permanent, unique user ID is associated with that account. Accounts, once created, can not be removed. They can, however, be permanently deactivated and hidden, or renamed and reused. If you re-use an account, bear in mind that any articles posted by the original username will subsequently be attributed to the replacement username.

Server Administrators can change the username associated with an account on the given user's Personal Information page. If you are a server administrator, the Username field on this page will be editable.

Username	Christopher]
Name	Chris Nuzum

Setting Passwords

Server administrators can set the password for a new user on the Personal Password page.

Setting Permissions

After creating a new user, you can use the Traction Groups to add the user to appropriate groups, and the Access Control List to set their permissions. A table of each user's permissions is available on the Permissions tab.

Access Control List

Doc4: March 22, 2008 3:44 PM, Posted by Documentation Importer

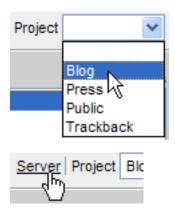
Access Control Lists (ACLs)

The section Using the Server ACL Editor Intro in the *Using the Server ACL Editor* chapter explains how to configure server-level user permissions; the section Overview of the Project ACL Editor in the *Using the Project ACL Editor* chapter explains how to configure project-level permissions.

You can get from the Server ACL Editor to the Project ACL Editor and back using the controls at the top



of either ACL Editor window:



ACLs can specify permissions for users and groups. Groups can be defined at the server level using the Traction Groups, or at the project level using the Project Setup - Members, which are also accessible from one another in the same way that the Server ACL Editor and Project ACL Editor are.

Traction Groups

Doc297: March 22, 2008 4:22 PM, Posted by Documentation Importer

Traction Group Editor

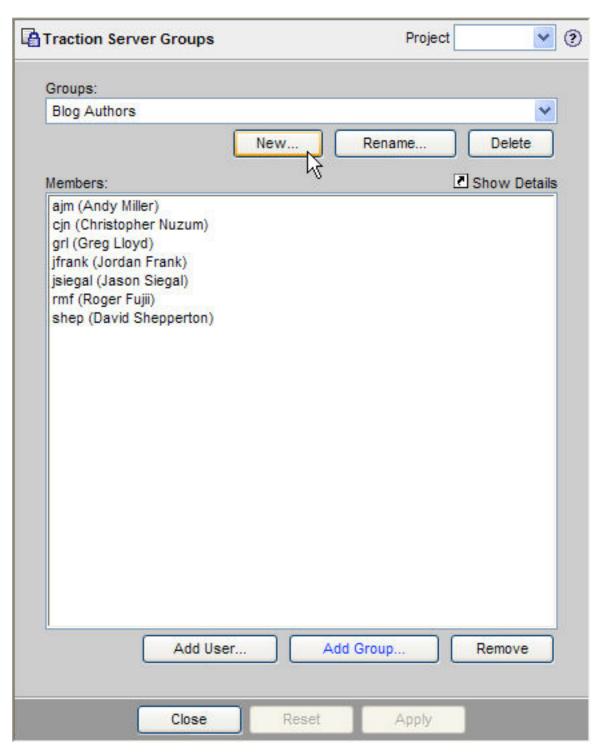
Traction's ACL rules can be defined for users and groups. Groups, in turn, can be defined in terms of users, groups in an *external* directory system, and groups defined *inside* Traction.

The Traction Group Editor lets you define groups inside Traction, at the server and project levels. Groups defined at the server level can be referenced in *any* ACL inside Traction, whereas groups at the project level can only be referenced in *that project*'s ACL.

Creating a New Group

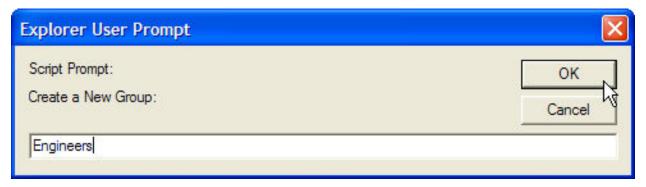
To create a new Group, click the New button at the top of the group editor.





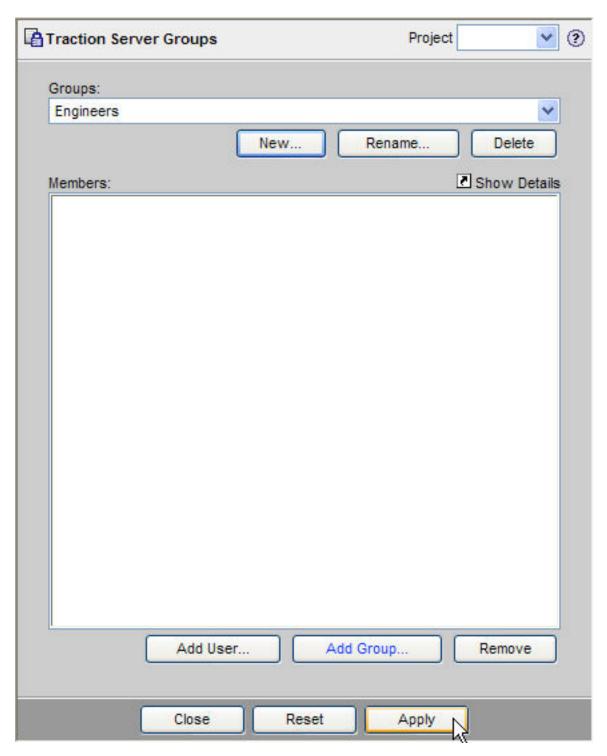
Type the new group's name into the dialog and press OK.





To apply your changes, press the Apply button at the bottom of the screen.





Adding a User to a Group

Click Add User.

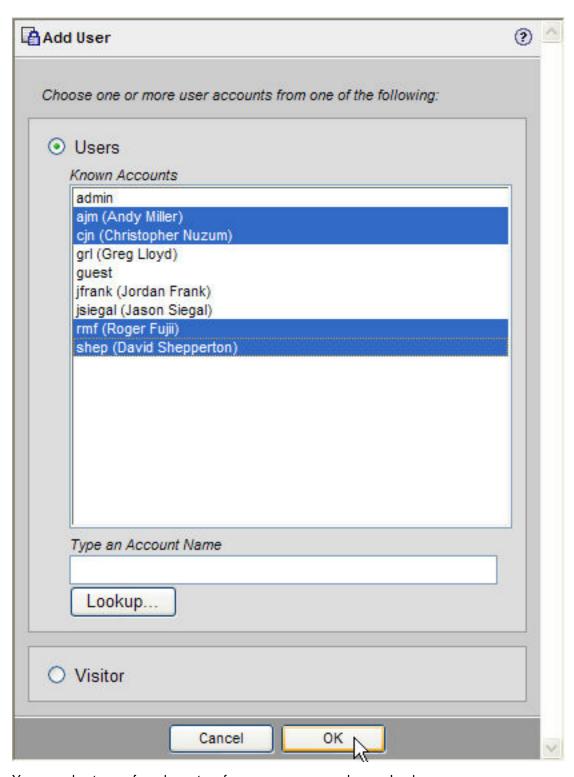




The user chooser appears.

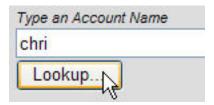
You can select as many users as you like. To select a contiguous block of users, press the Shift key while clicking and dragging your mouse pointer from the beginning of the block to the end of the block. To select multiple users individually, press the Control key (Command on the Macintosh) and click on each username individually. Press OK when you're finished selecting users.



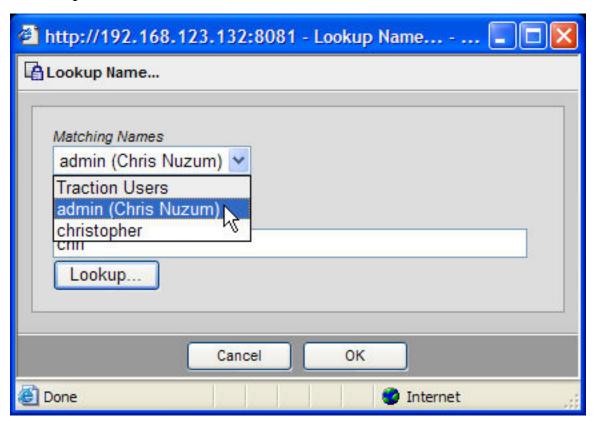


You can also type a few characters from a username and press Lookup.





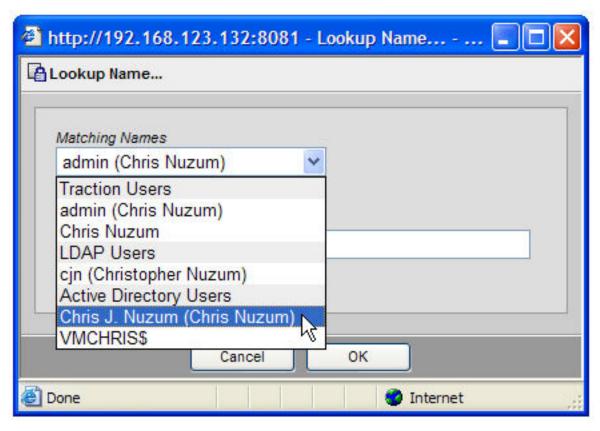
If there is a single result, it will automatically be selected and inserted into the group member list. Otherwise, the lookup window will appear with a list of matching names. You can select one from the list of matching names.



When you press OK, the user you selected will be added to the list.

If your server is connected to Active Directory or LDAP, the lookup also lets you select users from those directories. The users presented are grouped by directory.

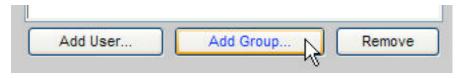




Adding a Group to a Group

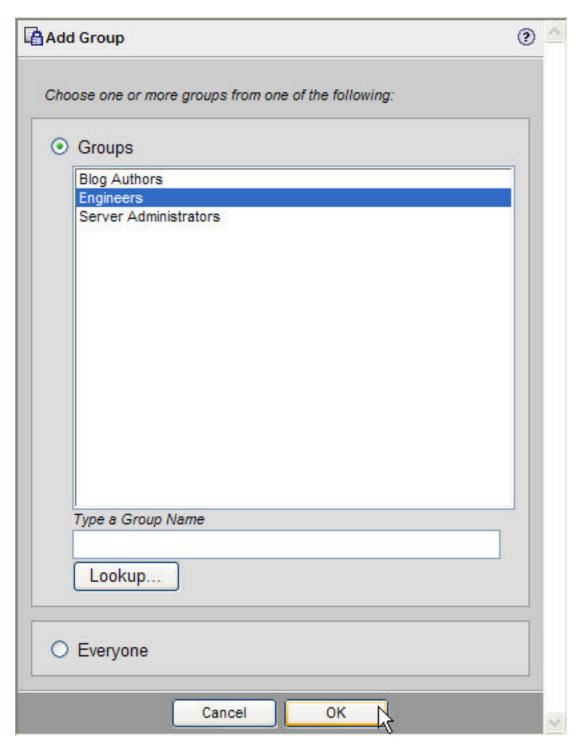
You can also add groups to other groups.

Let's say we want to add the Engineers group to the Server Administrators group. We first create the Server Administrators group, then click *Add Group*.



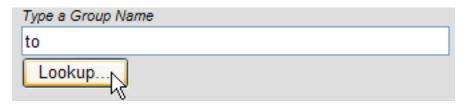
As with the user chooser, you can choose one or more groups using this form.



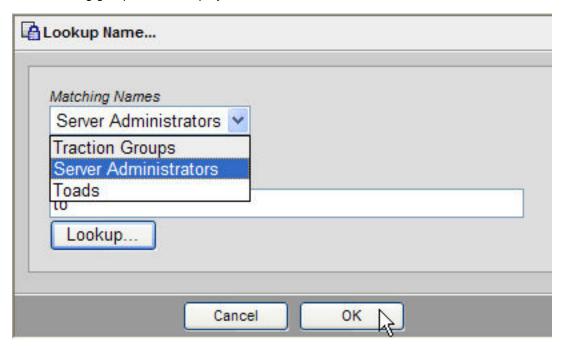


You can also type part of a group name and press Lookup.



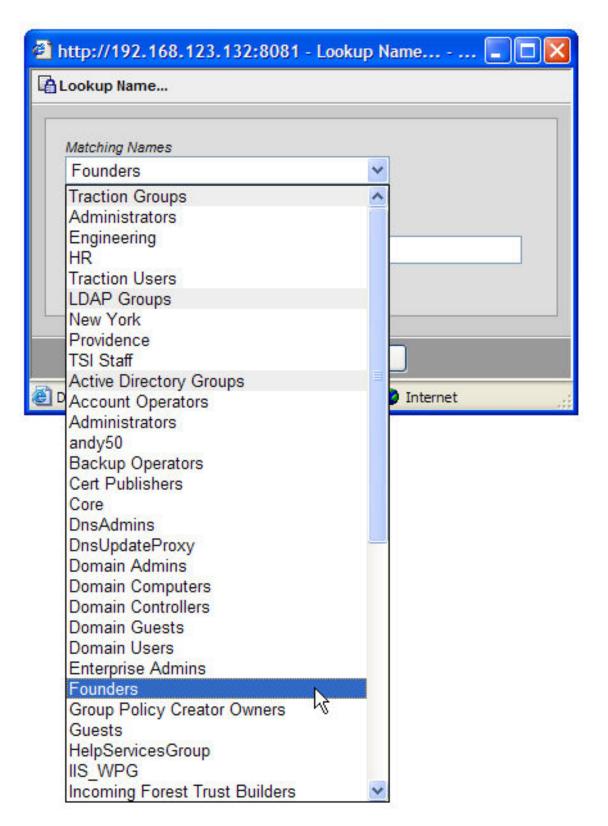


The matching groups will be displayed.



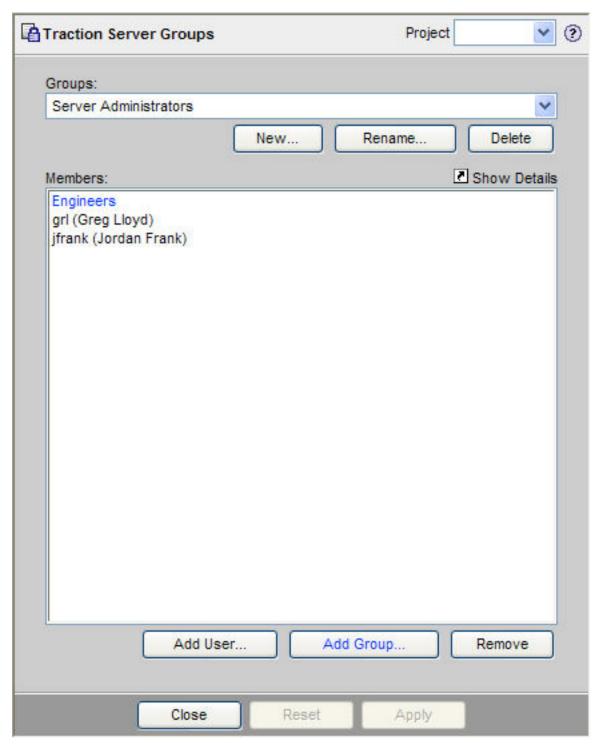
If your Server is connected to Active Directory or LDAP, your group lookup will also return groups defined in your directory. Groups are organized by the directory in which they are defined.







In the members pane, other groups appear in blue, while users appear in black.



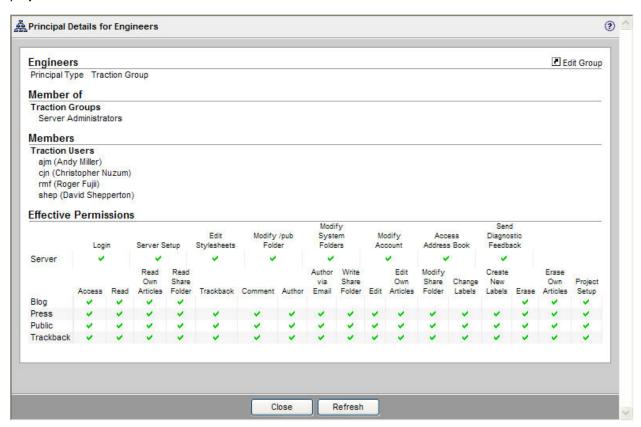
Showing User or Group Details



You can select a user or group and click *Show Details* to see detailed information about the selected principal.



Clicking *Show Details* for the Geniuses group shows that it is the member of another group, lists the users of the group, and shows the effective ACL permissions for the group at both the server level and for each project.

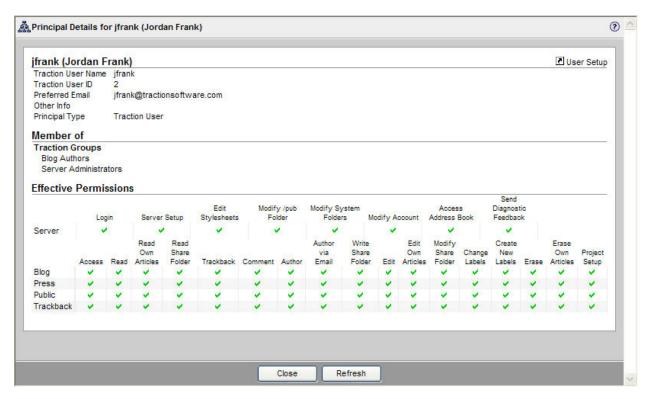


Similarly, Show Details for a user gives the details for that user.



This shows the details, group membership, and the effective permissions for the user.

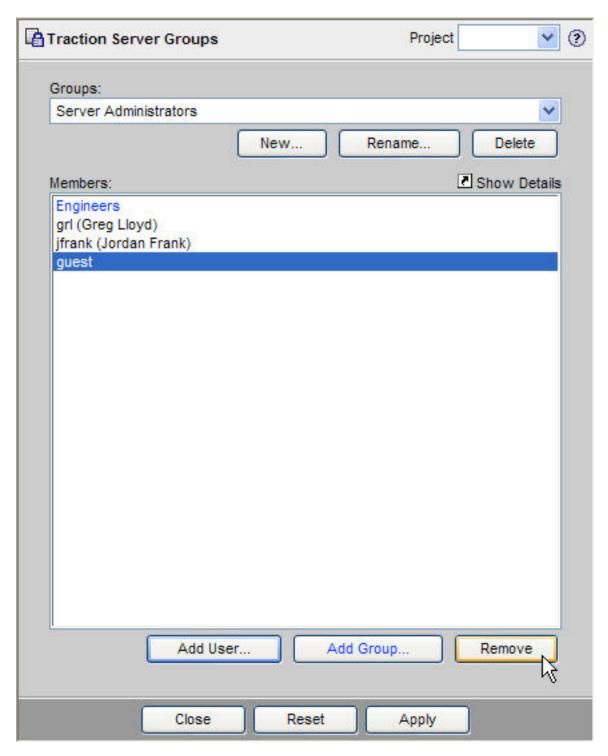




Removing Users or Groups from a Group

To remove a group our user, select who you want to remove and press the remove button.





Notice that when you do this, the *Apply* button becomes enabled.





To complete the remove, you must press Apply.

If you try to close the window or switch to another group, Traction will warn you. Pressing *OK* will apply your changes; *Cancel* will discard them.

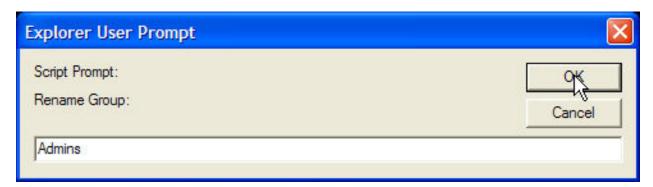


Renaming Groups

To rename a group, select a group and click the Rename button.



Choose a new name, and press OK.



Notice that when you do this, the *Apply* button becomes enabled.

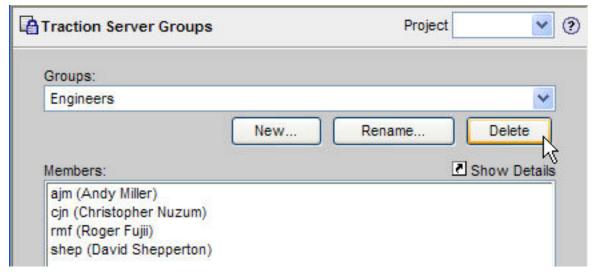




To complete the rename, you must press Apply.

Deleting Groups

To delete a group, select the group and press the delete button:



You will be asked to confirm this change:



Note: this change takes place *immediately*, and any references in ACLs to this group will become references to the group's former internal identifier.

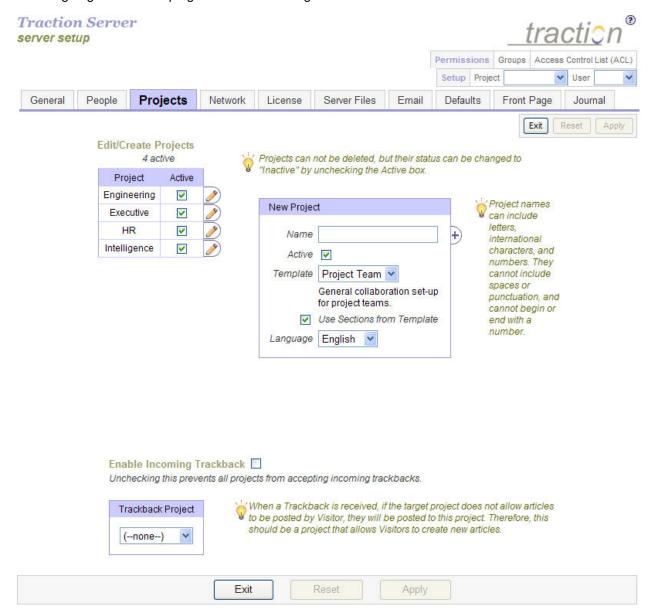
Server Setup - Project Tab

Doc258: March 22, 2008 4:18 PM, Posted by Documentation Importer

In the Project tab, you can create, deactivate, and reactivate projects. You can also configure how Traction handles Trackback A protocol where an author of a weblog post can notify another weblog that



the author has written an article that refers to a post in the other weblog. Traction supports both incoming and outgoing trackbacks. pings from other weblogs.



Creating a New Project

To create a new project, you must first choose a name. Since project names form part of the Traction IDs used for creating citations and other types of relationships, Traction requires that project names adhere to certain rules. Also, since people often *use* these Traction ID's, e.g. when directing someone to an article over the phone or when typing a citation link, it's good to adhere to certain naming guidelines.

What Can I Name My Project?

Project names:



- Can contain letters, numbers, and other UNICODE characters, including accented European, Greek, Cyrillic, Japanese, Chinese, Korean, etc.
- Cannot contain blanks or punctuation characters
- Cannot end in a number

What Should I Name My Project?

The primary role of projects in Traction is to designate the *audience* for a set of articles. That audience is defined by the project's Access Control List (ACL). For this reason, projects provide a *social* function beyond just identifying a topic (for which labels often suffice).

When you create a project, it should be for one of the following reasons:

- The planned **content** doesn't belong in an existing project. For example, one might create a *Support* project separate from an *Engineering* project even though the support and engineering teams may have full permissions to both projects.
- You have a new **audience** you would like to address. Using labels, projects let you share content with a new audience both from the new project *and from other projects*. For example, you might want to create a *Public* project, for sharing content with the entire Internet community, or a project for a specific partner or customer with whom you wish to exchange information.

Here are a few tips to keep in mind when you're naming a project.

- 1. Choose a **short** name. It's easier to cross-reference Marketing582: Categorization Software Market Sizing (Red Herring) than to look at MarketingWhitePapers582. Also, you can use a White Papers label to group the white papers within the Marketing project.
- Choose a clear name. MA582 is convenient, but cryptic. When possible, use names that already exist in your organization's culture.
- 3. Name a project as **broadly** as possible; if your organization launches several products a year, but the same core team is involved, create a project for the team and use labels to identify activities related to different launches. You can always create other projects for groups with different permissions, like managers or executives.
- 4. Use **singular** instead of plural names. If you have a project called Issue for tracking issues, you can refer to individual issues by number, e.g. Issue545. This makes more sense than referring to "Issues545".
- It's OK to use mixed case in project names, and can improve readability. Consider which is easier
 to read at a glance: MARKETRESEARCH, marketresearch, or MarketResearch. Traction ignores
 cases when sorting and processing project names.

Enter the Project Name

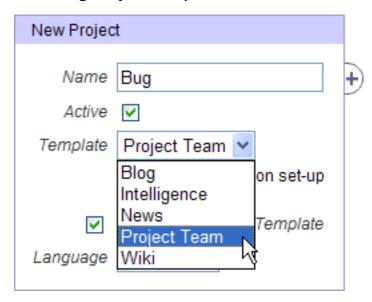
Enter the name of the project you wish to create.

Name	Bug
Active	▽



If you want it to be available for use immediately, leave the "Active" checkbox checked. If you prefer to configure permissions, newspage, and other settings before making it available to your users, you can make your new project initially inactive by un-checking that checkbox, and return to this page to activate it once you are satisfied with the configuration. Inactive projects do not appear in Traction's navigation interfaces, and do not accept new posts.

Choosing Project Templates



Project templates allow you to create a project with labels and newspage sections that have been tailored for a specific use-case.

Note: By default, the "Use Sections from Template" option checkbox is checked.



If you plan on using default newspage sections configured at the server level, you should un-check the checkbox. If you elect to use the sections from the template a section here, you will override the default. You can always choose sections from a template later using the Changing Front Page and Newspage Section Layouts on the Project Setup - Newspage page. If you are using a custom project template that you have designed for a certain class of projects, you will probably want to use the sections from your template.

For more information, read the Project Templates help topic.

Language

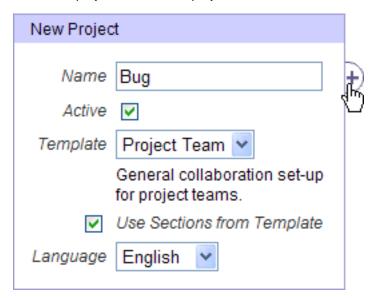
Traction's standard set of project templates are internationalized. When you apply a template, which creates labels and (optionally) sections for your project, you can choose the language in which you would like the labels (and sections) from that template to be created.



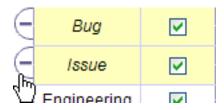


Add the New Project to the List of Projects to Create

After filling in the name of the project and reviewing the related settings the New Project form, click the +) to add the project to the list of projects to create.



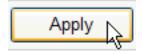
The list of projects to create appears at the top of the project list:



To remove a project from the list, click the (- button.

Note: The projects are not created until you apply the changes on this page.

When you are ready to create the projects, click the apply button at the bottom of the page.





The projects you created will appear, listed alphabetically.



You can now configure your new project using Project Setup interfaces. To navigate to Project Setup from this page, click the pencil icon to the right of the project you want to set up.

Deactivating or Activating a Project

You may want to deactivate a project when:

- The content in the project is no longer needed or relevant. For example, you may start with a Sandbox project to help the first people learn how Traction works. Once your journal has enough content for newcomers to learn by example, you might want to deactivate the Sandbox project.
- You want to create a new project, but your license limits the maximum number of projects to the number of projects that are currently active.

To deactivate a project, un-check the checkbox in the Active column next to the project's name and press *Apply*.

Edit/Create Projects

4 active



Inactive projects are listed in grey italic underneath the active projects.

To reactivate a project, click the checkbox next to it, and click Apply.



Edit/Create Projects

5 active



Configuring Incoming TrackBack

If you want authors of other weblogs on the Internet (including, but not limited to, other Traction-based weblogs) to be able to post to your journal notifications of their citations of articles in your journal, you can enable incoming TrackBack A protocol where an author of a weblog post can notify another weblog that the author has written an article that refers to a post in the other weblog. Traction supports both incoming and outgoing TrackBacks. See http://www.movabletype.org/trackback/beginners/ for details..

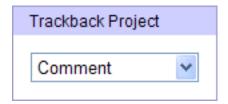
Whenever they cite content in your journal, they can send a TrackBack "ping", with a brief explanation. If you configure your server to accept these pings, they will be posted as articles with the *trackback* relationship to your original post. Traction lets you display these as related articles, or as comments.

Enable Incoming TrackBack

To enable TrackBack for your journal, you must check the checkbox.

Enable Incoming Trackback ✓ Unchecking this prevents all projects from accepting incoming trackbacks.

TrackBacks are not authenticated. Therefore, if you want a given project to be able to accept TrackBack articles, you must enable Visitor to post to that project. If you want to enable TrackBack, but you don't want to open up post permission to Visitor to the project where the article is posted, you can designate another project as a TrackBack project.



All incoming TrackBacks to projects that don't accept posts from Visitor will be sent to this project.

Note: You should make sure that the TrackBack project you designate allows Visitors to post.



After changing TrackBack settings, remember to apply your changes.

To learn more about TrackBack, see the section Trackback - In and Out.

Server Setup - Network Tab

Doc256: March 22, 2008 4:18 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

In the Network tab, you can activate HTTPS encryption, configure the Port and Address of the server, control gzip Compression, set up a Secure Access List, configure Traction to HTTP Proxy for Outgoing Requests, and Maximum Attachment Size.

Note: Unless otherwise noted, changes you make on this page will not take effect until the server is Rebuild, Restart, and Shutdown.

Security Level

Doc239: March 22, 2008 4:16 PM, Posted by Documentation Importer

Traction supports four encryption modes:

- 1. No encryption, the default.
- 2. HTTPS (TLS) encryption.
- HTTPS (TLS) encryption with optional X.509 certificates. In this mode, users will be allowed to log into Traction without a trusted client certificate, but they may use one if it is available.
- 4. HTTPS (TLS) encryption with required X.509 certificates. In this mode, only users with a trusted client certificate will be allowed to log into Traction. They will be able to log in with any valid Traction credentials. Users without a certificate will be denied access.
- 5. HTTPS (TLS) encryption with optional X.509 certificates. In this mode, users with a trusted client certificate will be allowed to log into Traction. They will be able to log in with any valid Traction credentials. Users who don't have a certificate will be treated as Visitor.

The procedure for configuring HTTPS is explained in the section Setting up HTTPS.

The options provided depend on your selection.

Security Level No Encryption

Transport Layer Security (TLS) is the new name for Secure Socket Layer (SSL). TLS Encryption is what most eCommerce websites use to transmit sensitive information. It prevents others from seeing what is being transmitted, but there is no validation of the particular client with which the server is communicating. TLS w/ Client Auth adds X.509 certificate authentication to TLS Encryption.



When you select TLS encryption, a link appears to the private key manager, where you can configure a private key and generate a certificate signing request (CSR).

Security Level TLS Encryption >

Transport Layer Security (TLS) is the new name for Secure Socket Layer (SSL). TLS Encryption is what most eCommerce websites use to transmit sensitive information. It prevents others from seeing what is being transmitted, but there is no validation of the particular client with which the server is communicating. TLS w/ Client Auth adds X.509 certificate authentication to TLS Encryption.



TLS Encryption requires a server private key. Click here to manage the private key.

If you select TLS with Client Auth, a second link appears, to the Trust Manager, where you can decide what certificates to trust.

Security Level TLS w/ Client Auth

Transport Layer Security (TLS) is the new name for Secure Socket Layer (SSL). TLS Encryption is what most eCommerce websites use to transmit sensitive information. It prevents others from seeing what is being transmitted, but there is no validation of the particular client with which the server is communicating. TLS w/ Client Auth adds X.509 certificate authentication to TLS Encryption.



TLS Encryption requires a server private key. Click here to manage the private key.



TLS with Client Authentication requires that client certificates be trusted.

Click here to manage trusted certificates.

Note: Changes to security level take effect when you press Apply. They do not require a server restart. After pressing apply, you may need to change the URL in your browser from http to https, or from https to http.

Note: It is possible to run Traction on up to 3 ports simultaneously, with different security settings on each. You might do this to allow unencrypted http access within your firewall but require https outside your firewall. This can only be configured by editing the Traction properties file while the server is shut down. Please contact Traction support (support@tractionsoftware.com) for instructions.



Port

Doc201: March 22, 2008 4:11 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

By default, Traction runs on port 8080. If you would like to run on a different port, you can enter a different port number here. The change will not take effect until you restart the server.



The port you select will become part of the URL.

If you also specify a Address, Traction will bind specifically to that IP address.

Note: It *is* possible to run Traction on up to 3 ports simultaneously, with different security settings on each. You might do this to allow unencrypted http access within your firewall but require https outside your firewall. This can only be configured by editing the Traction.properties file while the server is shut down. Please contact Traction support (support@tractionsoftware.com) for instructions.

Can I run Traction on protected ports like port 80 (HTTP) or 443 (HTTPS)?

Yes, provided that the port is not already in use and that Traction run as a Windows Administrator account or a Unix root user. Ports less than 1024 can only be accessed by programs running with root/Administrator permissions.

What if I already have a server running on the port Traction uses?

If you already have a process using that port, Traction will not be able to start and will report the following error to both the console and to the traction.log logfile:

```
*** Error ***

Could not initialize server on port 8080. Either another process is using the port, or the bind address specified (see URL below) is not on this machine.

Unable to start server on http://plum.local:8080

One or more sockets failed to bind. Traction will now exit.

Press the enter key to exit Traction.
```

If you receive this error, you will need to shut down the other server, or bind it to a different IP address than the one to which you bind the Traction server.

If I want to run on port 80, do I really have to run as root?

Techniques for working around this requirement exist, but tend to be very platform and installation specific and are outside the scope of what we cover in this guide.

Depending on your platform, you may be able to reroute traffic from port 80/443 to other ports. For example, on Solaris and BSD, you might add a line like this to ipnat.conf:

rdr dnet0 192.168.2.1/32 port 80 -> 192.168.2.1 port 8080

If you replace dnet0 with the interface you want to remap from and 192.168.2.1 with the IP address of the host running Traction, traffic on port 80 can be shifted to a non-root process on, in this case, Traction's



default port 8080. On Linux you can do the same thing using ipchains.

Some customers use a port-forwarding router to direct traffic to other ports.

Address

Doc8: March 22, 2008 3:45 PM, Posted by Documentation Importer

Server Address and Server Name

Specifying a Bind Address

Most operating systems, including Windows, Linux, Solaris, and Macintosh OS X, allow a computer to have multiple IP addresses on a single Network Interface Card (NIC).

By default, your Traction server will report the IP address it detects as active in this field.

If your server has multiple internet addresses, this allows you to restrict Traction to answer only to a specified address. In order to bind to only one address, you must specify the address and check the *bind* checkbox.

(optional: Used to select the correct ethernet address if the computer has more than one because it is attached to multiple networks, e.g. firewall machines. Selecting bind means talk only to that address; otherwise, the address is just used as the address the server publishes for itself.)

Specifying the Server Name

The bind address above lets you control the actual IP address that Traction uses.

However, you may want Traction to use a different address or host name when it creates fully-qualified URLs to refer to resources on your server. Traction creates such fully-qualified URLs in generated email messages (like the digest) and on certain other pages.

You might want to override the default Server Name if you:

- Want to bind to a specific IP address, but print URLs using a DNS name.
- Need to bind to a private network address behind your firewall (like 192.168.123.101), but print URLs using a public IP (or DNS) address passed through the firewall.

Enter the address you want to use for URL generation in the Server Name field. After you press apply, the text underneath will show the base URL that will used.



Server Name get-traction.com

Links into Traction will use the server base: http://get-traction.com:8081 (optional: Used to specify the name of your Traction Server. This overrides the value Traction gathers from its operating environment. When content is sent out from Traction, links back to the server are created using this name. An IP address will work if your server has no name.)

Note: if your server is configured to run on multiple ports with different security levels, you can use this field to designate which URL base and port you would like Traction to use for printing URLs. To do this, you can enter the complete base URL into this address, including the protocol (http or https).

Server Name https://foo.com:444

Links into Traction will use the server base: https://foo.com:444
(optional: Used to specify the name of your Traction Server. This overrides the value Traction gathers from its operating environment. When content is sent out from Traction, links back to the server are created using this name. An IP address will work if your server has no name.)

gzip Compression

Doc334: March 22, 2008 4:27 PM, Posted by Documentation Importer

You can enable and disable gzip compression using the checkbox.

gzip Compression enable gzip compression will significantly decrease the bandwidth used for text and html content, but it will increase the load on the server.

Enabling gzip compression can dramatically reduce the amount of data sent over the network, but it increases the CPU required on both the client and server to compress and decompress the data.

To control what file types are gzipped, see the next topic, gzip MIME Types.

gzip MIME Types

Doc335: March 22, 2008 4:27 PM, Posted by Documentation Importer

This setting lets you control the file types that are gzipped when gzip compression is activated. You can add additional types to this list, or remove types from this list. To restore the original list, click the *Restore Defaults* button.



gzip MIME Types

This is the list of MIME types that should be gzipped. The list should list MIME types separated by commas, with no additional space.

text/javascript_text/plain_text/html_text/xml_text/css_application/xml_application/x_atom+xml

Reset Defaults

Secure Access List

Doc238: March 22, 2008 4:16 PM, Posted by Documentation Importer

You can instruct Traction to only accept connection attempts from IP addresses or ranges that you specify in advance, for example those of customers or partners. When this feature is enabled, connection attempts from unlisted addresses will be ignored.

This interface has two columns. The first column lets you specify a list of addresses; the second lets you write notes to remind yourself who is represented by each address.

Secure Access List enable access control

(optional: to restrict access only from specified IP addresses)
You can type a hostname, e.g. myhost.mydomain.com, or an IP address.
Wildcards are legal in any or all slots in the numeric IP address, e.g.
192.168.2.*, but not in the hostname.

	Hosts	Notes	
\in	192.168.123.*	Internal network	
\in	128.148.*.*	Brown University	
\in	get-traction.com	Remote server	
			Ð

Note: You can use wildcards in any position in numerical addresses. Wildcards are *not* supported in DNS addresses.

These entries are supported in the host field:

- 192.168.2.*.
- 192.168.*.*
- 192.*.2.*

These are not supported:

192.*
 (not supported because it doesn't have a wildcard in each supported position)



192.168.*

(not supported because it doesn't have a wildcard in each supported position)

mycompany.*.com

(not supported because wildcards are only supported in numeric addresses)

*.mvcompanv.com

(not supported because wildcards are only supported in numeric addresses)

HTTP Proxy for Outgoing Requests

Doc129: March 22, 2008 4:04 PM, Posted by Documentation Importer

Besides *serving* HTTP requests from clients, for certain operations, a Traction server may also be issuing requests to *other* remote servers. Retrieving images to be attached to articles, fetching newsfeeds for use with the FeedReader component, and retrieving remote images to be embedded in exported content all potentially require a Traction server to make HTTP requests to remote hosts. In many environments, it will be necessary or useful to route such requests through an HTTP proxy server. Starting with version 3.7, your Traction server can be configured to use an HTTP proxy for its outbound HTTP requests.

The configuration interface for HTTP proxying is located on the Server Setup - Network tab:

Address		Port
Use Credentials for Proxy		8080
Use Credentials for Username	Password	
Use NTLM Authent	ication When Possible	

Traction will make outgoing HTTP requests to download referenced images and to download RSS and Atom feeds for the Feed Reader capability.

You can simply specify the address and port for the proxy server, or for more elaborate configurations, you can also specify the username/password credentials to be used to authenticate with the proxy.

Be sure that if you plan to use the credentials for the proxy, that the "Use Credentials for Proxy" checkbox is checked; and likewise, if you want Traction to use NTLM authentication with the proxy server, that the "Use NTLM Authentication When Possible" checkbox is checked. Also, be sure to check the "Use HTTP Proxy for outgoing requests" checkbox to enable HTTP proxy usage; even if you've entered the address and port of the server, it will not be used until you check that box.

Maximum Attachment Size



Doc167: March 22, 2008 4:07 PM, Posted by Documentation Importer

Important Note: This setting applies to all files that are received by your Traction server, regardless of how they arrive (uploaded via a web-browser; attached to an email message; included in a SOAP or other RPC payload; etc.).

If you wish to limit the size of attachments to Traction, click the *Enforce Maximum* checkbox and enter a size in megabytes. Attachments that users attempt to post that exceed this limit will be discarded.

Maximum Uploaded File Size 10 MB Enforce Maximum

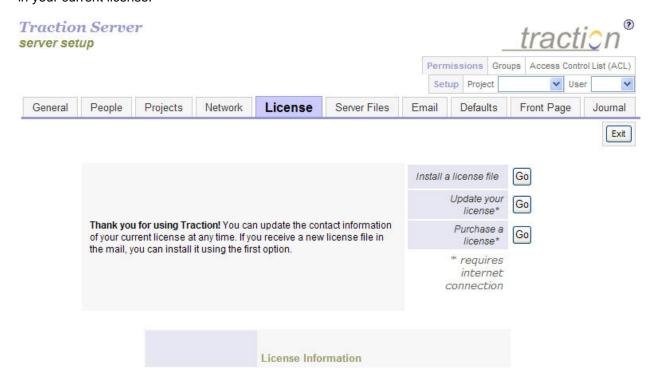
If the "Enforce Maximum" checkbox is checked, the server will not accept files any larger than the specified limit. Otherwise, uploaded files of any size will be permitted. Activate this feature in order to prevent users from uploading so much data that the disk volume where the journal is located fills up, causing the server to become inoperable. This setting affects all uploaded files, including article attachments, but it applies to individual files only.

In most situations where Traction is deployed to a known group of users, we recommend *not* enforcing a maximum attachment size. However, when exposing a Traction server to the public Internet and allowing Visitors to post, this can prevent malicious attempts to upload files large enough to fill the server's disk.

Server Setup - License Tab

Doc255: March 22, 2008 4:17 PM, Posted by Documentation Importer

The License tab lets you review the license you currently have installed and lets you install a new or updated license. You can also use Traction Software's license manager to update the contact information in your current license.





For information on installing a license file, see the section Installing a License.

To update your license information, click the Go button next to *Update your license*.

This will take you to the license server welcome page.

License Server



Welcome to the Traction Software, Inc. License Server. Please click next to continue.



Click *next* to continue. You can update any of the editable fields.



Street address: City: State or Province: Zip or postal code: Country:	Traction Software, Inc. 245 Waterman St. Suite 309 (International) Providence RI US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
City: State or Province: Zip or postal code: Country:	Suite 309 (International) Providence RI US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
City: City: Zip or postal code: Country:	(International) Providence RI US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
State or Province: Zip or postal code: Country:	Providence RI US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
State or Province: Zip or postal code: Country:	RI US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
Zip or postal code: Country:	US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
Zip or postal code: Country:	US residents: Please use the two-character abbreviation (e.g. CA) for the name of your state.
Country:	02906
1	United States V
	If your country is not listed above, please enter it below:
The above address is a:	Business
	Contact Person
Courtesy title:	Mr.
First name, initial:	Christopher J
Last name:	Nuzum
Job title:	сто
E-mail address:	cjn@tractionsoftware com
Voice phone:	401/528-1145
Fax:	

Click *register* when you have finished. This will take you to a confirmation page with the details of your license.



License Handler





Your New License Has Been Generated

Please review the information that appears in your license carefully. If there is an error, hit your browser's Back button and register again with the correct information.

If the information is correct, click next to continue.



License Information License ID: 806e0df.dba66353b1:5d43192.168.2.1 Master Owner ID: 806e0df:dba6635ad2:-6a7192.168.2.1 Additional Owner IDs: Expiration: none Evaluation License: no

If everything is correct, click the next arrow to continue.



This will return you to the original license page, but the details shown for your license will reflect the updates you just made.

Server - Server Files

Doc241: March 22, 2008 4:16 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Server Files

This tab lets you control many low-level Traction configuration settings. It also provides access to the various types of logfiles that Traction generates.

MIME type information

Doc165: March 22, 2008 4:07 PM, Posted by Documentation Importer, Edited by Paul Needham



If files are uploaded without an explicit MIME type being specified by the web browser, Traction will try to determine the MIME type of the file based on its extension, if one is present. The mime types file controls



the extensions Traction knows about. You can see the contents by clicking the View button. You can also use the Document Management Interface (DMI) to upload a modified version of the file with added or changed definitions.

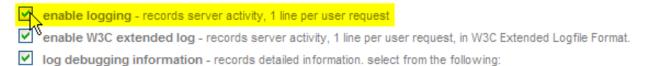
Server Log information

Doc247: March 22, 2008 4:17 PM, Posted by Documentation Importer



The traction.log file stored in the logs directory keeps a record of the server's activities and any errors encountered. You can inspect this file using the Log File Viewer by clicking the *View* button. To learn more about the Log File Viewer, see the section Troubleshooting Using the Log File Viewer.

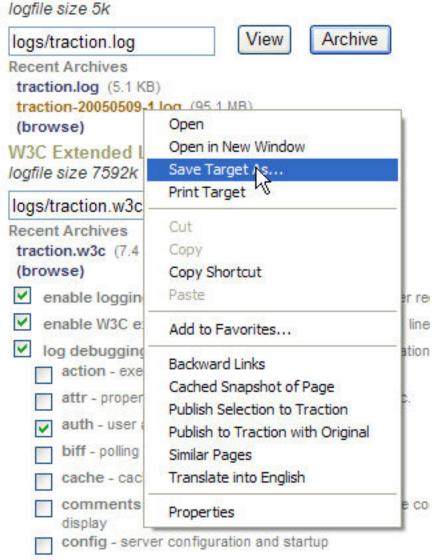
To turn on logging, click the enable logging checkbox and press Apply.



You can also archive the current copy of the logfile with a different filename. Clicking the *Archive* button saves the file with the name specified, followed by the date (YYYYMMDD), followed by the next available number for an archived file for that day's date. You can download the current logfile or any of the archived log files by right-clicking the filename and using the browser's *Save As* function.



Server Log information

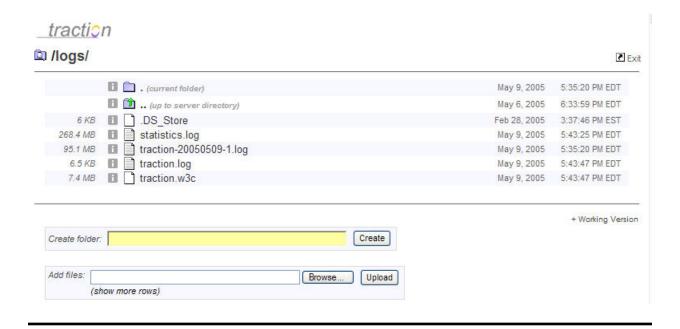


You can also browse the set of files in the logs directory by clicking the browse link.

Recent Archives traction.log (5.1 KB) traction-20050509-1.log (95.1 MB) (browse) W3C Extended Logfile Inform

This takes you to a Directory Listings and File Details using the Common File Interface view of the logs directory.





Debug Logging Controls

Doc57: March 22, 2008 3:53 PM, Posted by Documentation Importer

Traction is capable of generating additional Debug output to its logfile. This debug output can be invaluable in tracking down problems.

To enable debug logging, both the *enable logging* and *log debuging information* checkboxes <u>must both</u> <u>be checked</u>.

- enable logging records server activity, 1 line per user request
- enable W3C extended log records server activity, 1 line per user request, in W3C Extended Logfile Format.
- log debugging information records detailed information, select from the following:

After enabling debug logging, you can choose what debug streams to enable by checking the checkboxes next to their names, then clicking the *Apply* button.



action - execution and display of actions		mailfilter - incoming email filtering
attr - property packing/unpacking, loading/storing, etc.		mailheader - output from mail threading
auth - user authentication, permissions checking		mailserver - dialog with mail server
biff - polling requests from other Traction clients		mailthread - mail thread timing and activity
cache - cache hits, misses, loads, stores	~	mime - low-level mail MIME processing
comments - Turning on this error stream will disable comment display		module - module selection, url transformation
config - server configuration and startup		multipart - multipart data parser.
digest - sending of digests		newsfeed - reading and writing of xml newsfeeds
distrib - mechanisms for handling multiple distributed servers		np - newspage generation code
encoding - character encoding platform differences.		out - miscellaneous output
entry - article properties, etc.		parser - xml parser during article submit
entrycache - caching of articles		perspective - perspective logic
erase - erasing articles		rs - rapid selector expression parsing (very verbose)
eval - search evaluator		sdk - internal SDK exceptions
event - a) used to debug listeners, b) enables listeners to be run via URLs	V	sdl - Skin Definition Language implementation
feed - RSS/Atom Feed Parsing		sdltag - Debug output from SDL tag implementations
file - attachments, drafts, etc.		sditemplate - Debug output from SDL templates
fileservlet - serving images, attachments, etc.		sendmail - sending articles via email
fop - output from the fop pdf generator		shutdown - shutdown semaphore
formparser - Form Data Parsing		soap - soap services
ftsearch - full-text search engine		ssi - SSL/TLS setup
ftupdate - full-text search update		test - batch testing Traction security and functionality
http - http headers, redirects, etc. and self induced requests		timing - timing output, for rough measuring
i18n - internationalization		trackback - sending and receiving trackbacks
img - image serve timing		user - user properties
io - general i/o		useragent - prints the user-agent used to make each request
iterators - iterator problem indicators		usersetup - personal setup interfaces
journal - low-level journal operations		view - view generation progress indicators
keepalive - http keep-alive		webdav - WebDAV subsystem
Idap - LDAP implementation		xform - xml tranformations
lock - semaphore locking		xmlrpc - xmlrpc handlers
mail - pop/imap mail reading		xref - cross reference panel

Special Development Debug Streams

A few debug streams have additional side-effects when enabled that can be helpful when developing Traction extensions and customizations.

Stream	Side-Effect
sdl	Turns off caching of SDL templates. This means that you can edit a template and reload the view



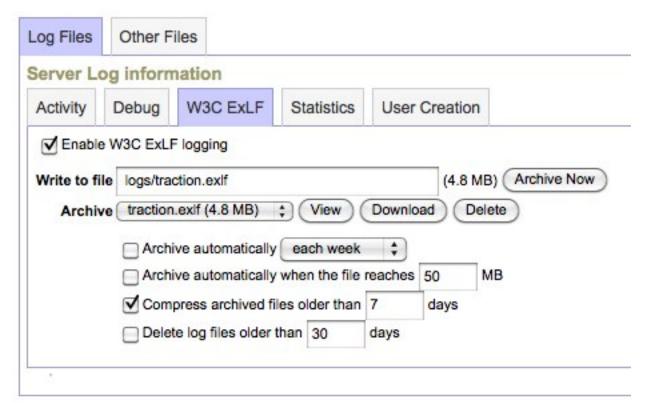
	immediately to see changes, without having to manually clear the server cache.				
xform	Turns off caching of XML transformation scripts, so you can edit transformation scripts and reload or re-parse without clearing caches.				
event	Enables listener views to be run directly by entering their URL. Normally listeners can only be invoked by posting Traction articles.				
mailserver	Echoes the complete conversation with the mail server to the console.				
timing	Gives timing information for Traction's content parsing and text transformation operations; and enables the SDL timer.* tags, which can be used to find out how much time the Traction server requires to generate pages or parts of pages.				

W3C Extended Logfile InformationDoc322: March 22, 2008 4:26 PM, Posted by Documentation Importer, Edited by Greg Lloyd

Traction supports industry-standard W3C Extended (ExLF) format logfiles. These logfiles only include information about requests from users, not server activity or debug information. They are easily used with logfile analysis software like NetTracker, WebTrends, Urchin, Analog, etc.

The W3C logfile controls work the same way as the Server Log information.





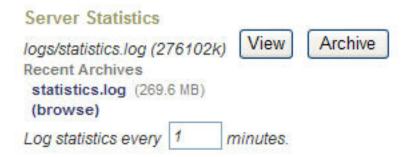
You can enable W3C logging by checking the *Enable W3C ExLF logging* checkbox and clicking the *Apply* button.

Server Statistics

Doc259: March 22, 2008 4:18 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Traction keeps track of the time and resources it consumes in the file statistics.log. You can control the log interval and explore the file using these controls.

See <u>Support668: How can I graph server memory usage?</u> for instructions on how to graph the server's memory usage.



Here is an example of the information Traction stores. This type of block is written to the logfile at the



above interval.

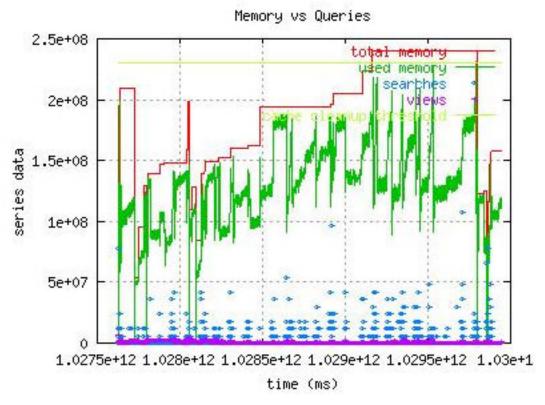


	609928ms = 19h 36m 49s nt interval: 15071ms = 15s					
Time	Operation	Current	Complete	Time*	Total*	
1115737804455	Search	0	0	0	0	3
1115737804455	View	1	0	0	30	
1115737804455	Files	0	0	0	86	
1115737804455	Append	0	0	0	0	1
Specific Operation	ins					
1115737804455	Post	0	0	0	0	
1115737804455	Erase	0	0	0	0	
1115737804455	Edit	0	0	0	0	İ
	ReclassifySingle	0	0	0	0	1
	ReclassifyMultiple	0	0	0	0	
1115737804455		0	0	0	0	
1115737804455		0	0	0	0	
1115737804455 1115737804455		0	0	0	0	
		0	0	0	0	9
1115737804455 1115737804455		0	0	0	0	
	POSLITACKDACK	Ů.	U	U	U	9
Specific Views 1115737804455	Single	0	0	0	0	
1115737804455	_	0	0	0	0	3
1115737804455		0	0	0	0	
1115737804455		0	0	0	0	3
1115737804455		0	0	0	0	
1115737804455		0	0	0	0	3
1115737804455	TopicRemoved	0	0	0	0	
1115737804455	TopicAddedPresent	0	0	0	0	3
1115737804455	TopicRemovedGone	0	0	0	0	
1115737804455	Newspage	0	0	0	0	1
1115737804455	Frontpage	0	0	0	0	
1115737804455	Visibility	0	0	0	0	1
1115737804455		0	0	0	0	
1115737804455		0	0	0	1	
1115737804455		1	0	0	22	
1115737804455	SDL	0	0	0	5	
SDK	C 1995	27		27		
1115737804455		0	0	0	2	-
1115737804455 1115737804455		0	0	0	3	33
1115737804455		0	0	0	0	
1115737804455		0	0	0	0	3
1115737804455		0	0	0	43	
1115737804455		0	0	0	0	į
	getLabeledEntries	0	0	0	6	
1115737804455	getLabelChangedEntries	0	0	0	6	
1115737804455	getSummaries	0	0	0	0	
1115737804455	getLabelUsage	0	0	0	0	1
1115737804455	getLabelActivity	0	0	0	0	
1115737804455	getJournalProperties	0	0	0	3	1
1115737804455	getProjects	0	2	0	53	
1115737804455	getUsers	0	2	2	48	
Search Details						
1115737804455		0	0	0	0	1
1115737804455			0	0	0	31
1115737804455			0	0	0	1
1115737804455		0	0	0	0	3
1115737804455		20	0	0	0	
1115737804455			0	0	0	31
1115737804455		U	0	U	U	-
Memory Cleanup 1115737804455		0	0	0	0	
1115737804455			0			1
1115737804455		0	0	0	0	-
		4		U	v	
JVM Memory Sta 1115737804455	FreeMemoryJVM	396482360	396482368	0	396482368	
	UsedMemoryJVM		36055232		36055232	
	TotalMemoryJVM		432537600		432537600	
	· ocalimonion ya vili	100010000	1000000000		10000000	9



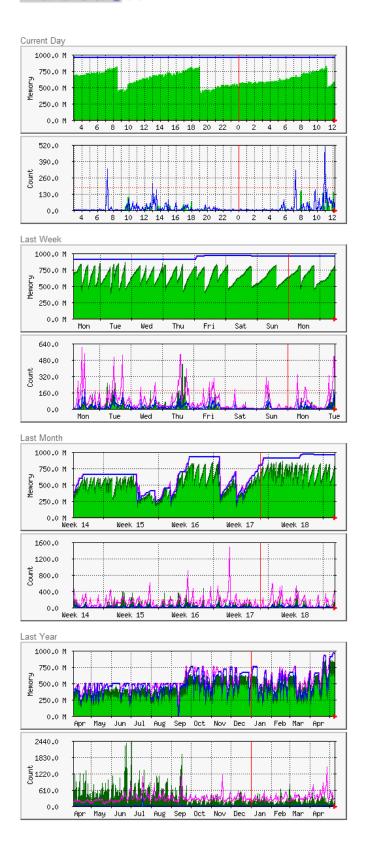
You can press the Record button to immediately write the current statistics to the logfile.

The Knowledge Base article How can I graph server statistics provides a gnuplot script you can use to graph the statics in a form like:



With a Unix computer, you can also use MRTG to create statistics graphs like these, which were created using a cron job, curl, and MRTG.





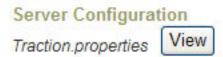


Please contact support@tractionsoftware.com if you would like a copy of the Unix scripts used to create these graphs.

Server Configuration

Doc242: March 22, 2008 4:16 PM, Posted by Documentation Importer

Much of Traction's configuration is represented in the Traction.properties file.



Clicking the *View* button will show you the current Traction.properties file.

Note: Certain changes to your server's configuration can be effected only by manually editing Traction.properties. But the Traction.properties file is written when the Traction server program exits: changes you make to Traction.properties while your server is running will not be reflected, and your changes will be overwritten when the server shuts down. **Make sure that you shut down your Traction server before making changes to Traction.properties.**

Force Client to Reload Static Resources

Doc1084: July 12, 2009 3:18 PM, Posted by Christopher Nuzum

If you have modified CSS stylesheets or JavaScript files on the server, press this button to make sure that the changes are propagated to all browsers. This increases a counter that is used in the filename for the files, which causes all browsers to load the files again rather than taking them from their local cache.

Transformer Configuration

Doc303: March 22, 2008 4:23 PM, Posted by Documentation Importer

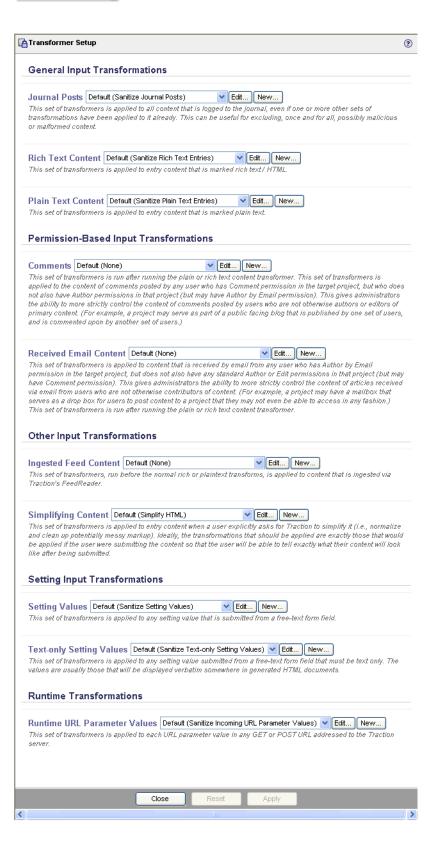
This control lets you open an editor to control the various transformations performed by Traction.



Cllick the *Edit* button to open the *Transformer Setup* window.

The Transformer Setup Window







This window lets you choose what sets of transformations are applied in the various situations described in the interface.

These transformers have several purposes:

- Remove SCRIPT, JavaScript, META, and other tags commonly used in cross-site scripting attacks.
- Normalize HTML content to make sure it is well formed.
- Make sure that no undesired top-level tags, e.g. HTML, HEAD, META, etc. are posted to the journal.
- Allow administrators to configure installation-specific transformations.

Each of the transformers listed in the Transformer Setup window is a *compound transformer*. Compound transformers consist of ordered lists of simple transformers and other compound transformers. Administrators can create new simple and compound transformers using the *Create and Edit Transformers Window*, which you can access by clicking the *Edit* or *New* button next to any of the selections. (The *Edit* button is not available if the currently selected transformer is not editable.)



Note: The standard transformations packaged with Traction can not be edited, but you can create new transformers and edit transformers you have created.

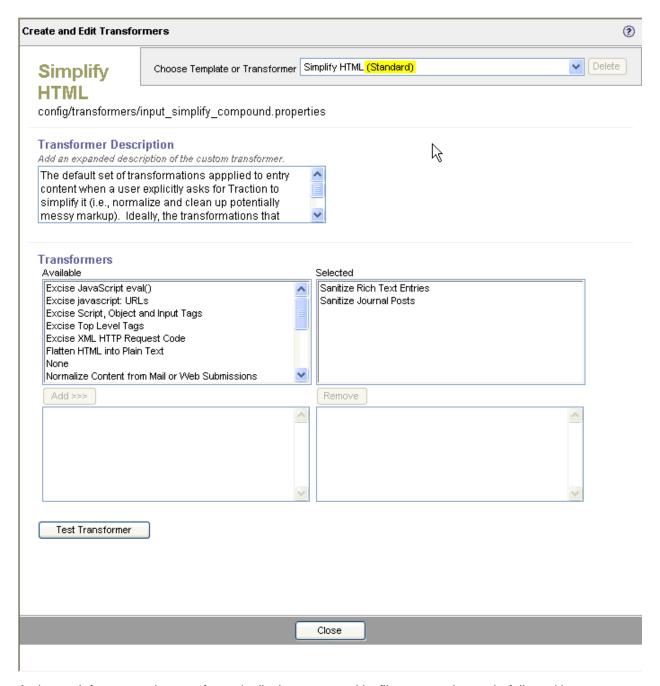
Inspecting and Testing Transformers with the Create and Edit Transformers Window

You can open any editable transformer in the list by clicking the *Edit* button next to it. Non-editable transformers in the list may still be inspected. For example, to inspect the default transformations applied when the user clicks the *Simplify HTML* button on the edit form, click the *New* button next to the selector labeled "Simplifying Content" to open the *Create and Edit Transformers* view in a new window.



Then choose "Simplify HTML (Standard)" from the list. Note that this transformation is listed as Standard. The Standard transformations are packaged with Traction and can not be modified, so there is no option to save these.





At the top left you see the transformer's display name and its filename underneath, followed by a description of what it does.

In the left column you see a list of all the defined transformers. On the right side are the transformations that are applied by this compound transformer.

If you want to test a transformer, click the Test Transformer button.



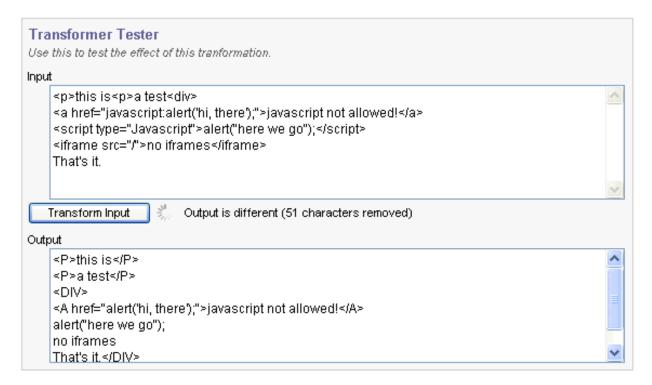


This button will be replaced with input and output areas. You can enter some content to transform in the input area.



When you press the *Transform Input* button, the output will appear in the output area:

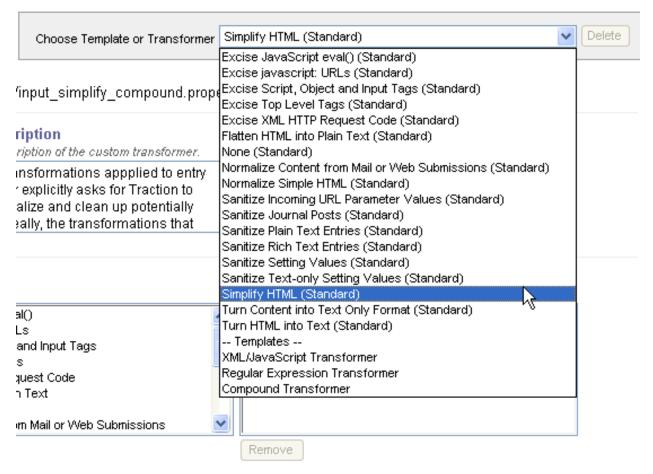




You can test any transformer this way.

You can use the pull-down menu in the top-right to visit any defined transformer.





You can use the *Delete* button to delete any transformer that you have defined. Standard transformers can not be deleted.

Creating New Transformers

Types of Transformers

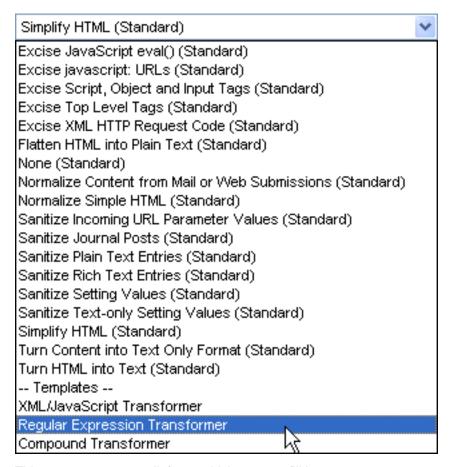
Traction currently supports creation of three types of transformers.

- Regular expression transformers let you use Java syntax regular expressions to rearrange content
- XML/JavaScript transformers apply Document Object Model (DOM) based transformations to HTML and XML content.
- Compound transformers invoke other transformers in a specified order.

Creating a New Regular Expression Transformer

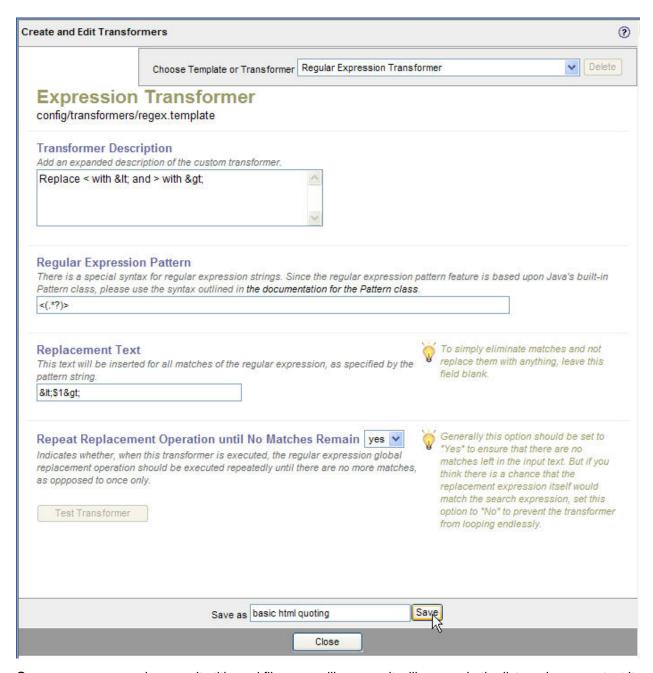
To create a new "regex" transformer, choose the Regular Expression Transformer template.





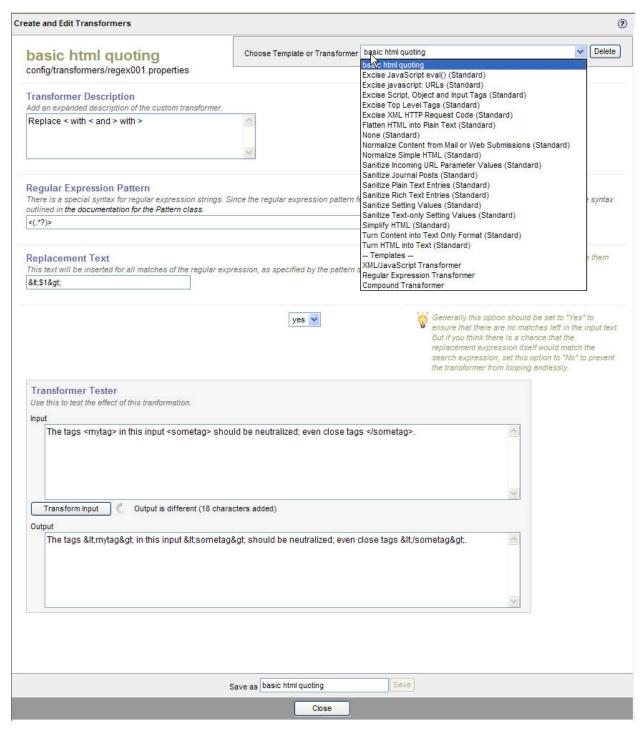
This opens up a new edit form, which you can fill in.





Once you save your changes, its title and filename will appear, it will appear in the list, and you can test it.





If you are connected to the internet, you should be able to follow the link below to the JavaDoc of the Java Regular Expression pattern class. This explains the syntax of the patterns supported by Traction.



Regular Expression Pattern

There is a special syntax for regular expression strings. Since the regular expression pattern feature is based upon Java's built-in Pattern class, please use the syntax outlined in the documentation for the Pattern class.

<(**?)>

Note: Normally the regular expression replacement operation is applied repeatedly until the result contains no more matches. This behavior can be disabled by changing the option below to "no", in which case the regular expression will only be applied once.



Note: It is easy to write a regular expression that always produces output that will match its pattern (depending upon the input). Even when the above option is set to "yes", Traction will not apply such transformations endlessly; it will cease processing without error after a fixed number of iterations.

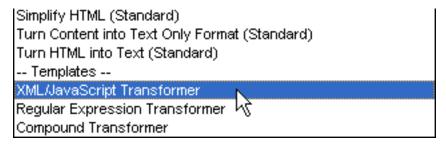
Creating a New XML/JavaScript Transformer

Traction includes a powerful SGML transformer that evaluates the DOM and allows ECMAScript code with full DOM access to be run on any matching nodes, producing arbitrarily transformed output. Traction includes a number of such scripts (in the lib directory with a .xf extension).

If an additional .xf script is installed in the lib directory, you can create a new transformer to enable it to be called in other compound transformers.

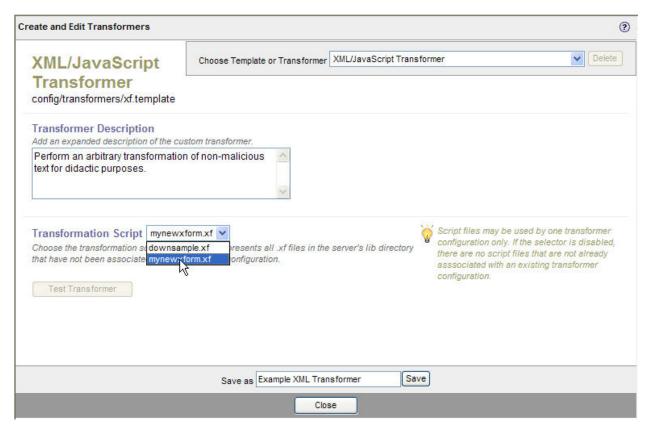
Note: .xf files can not be installed through Traction's web interface. They require access to the computer on which Traction runs.

To create a transformer to wrap an .xf script, choose XML/JavaScript Transformer from the pull-down menu.



The editor will appear. You can type a description and select the .xf script you wish to invoke.





Note: .xf scripts can only be listed in one transformer, so only .xf scripts that have not yet been wrapped in a transformer will be listed in the selector.

Now you can name and save your transformer.



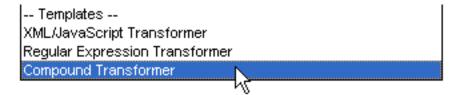
It will then appear in all the lists of transformers.

Creating a New Compound Transformer

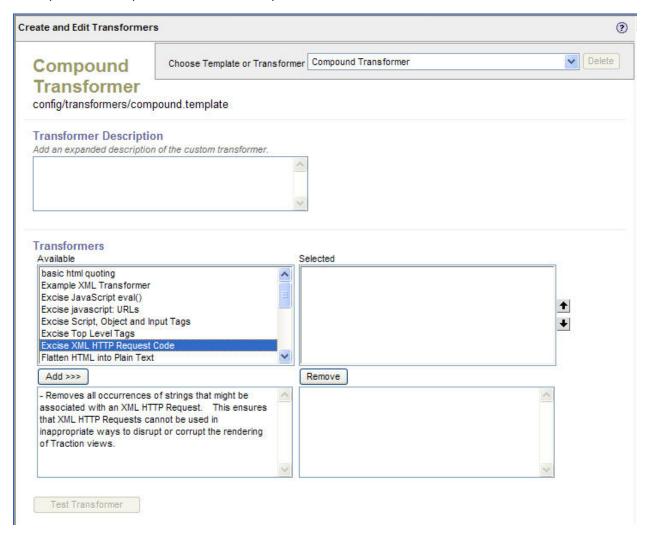
Compound transformers let you define a sequence of transformations to be applied in various situations. You can create alternatives to the transformers that are bundled with Traction. You might do this to prevent users from posting certain content or to allow them to post content that is barred by default (like FORM and IFRAME tags).

To create a new compound transformer, choose Compound Transformer from the pull-down menu.





This opens the Compound Transformer template.



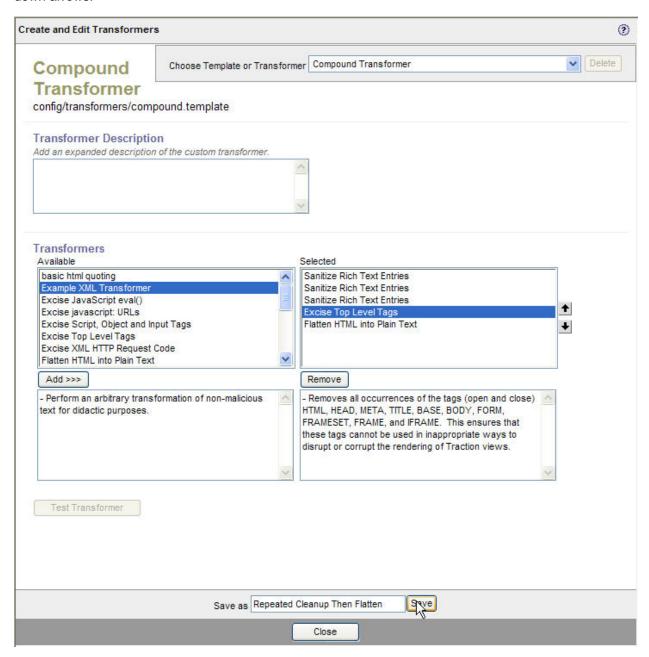
You can enter a description for the transformer. Your description will be shown whenever the transformer is selected.

Underneath the description field is a list of all available transformers. Click on a transformer in this list to see its description.

The transformer or transformers that are highlighted in the "Available" selector, click the "add" button. This will copy the highlighted transformers from the "Available" list to the "Selected" list. You can add multiple instances of a transformation. The transformations in the "Selected" list are applied in the order in



which they are listed. To move a transformer in this list, highlight it by clicking on it and use the up and down arrows.



When you have completed defining the compound transformer you can save it, test it, and select it in the list of transformers in the Transformer Setup window.



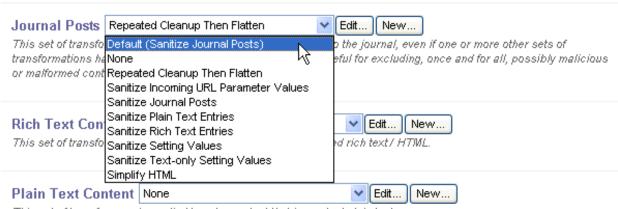
General Input Transformations



Restoring Factory Settings

If you decide that you want to revert from a customized transformer regimen to the defaults, you can just choose the default value indicated for each selection in the Transformer Setup window.

General Input Transformations



This set of transformers is applied to entry content that is marked plain text.

Since standard transformers can not be edited, resetting each selection to its default value will reestablish the default configuration.

Don't forget to click the Apply button at the bottom of the page to apply your changes.

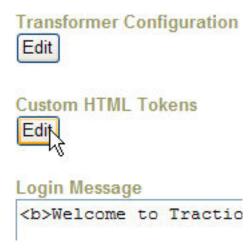
Custom HTML Tokens

Doc53: March 22, 2008 3:52 PM, Posted by Documentation Importer

As of version 3.7, Traction supports customized tokens, for which various renderings may be made available in different contexts. The Custom HTML Tokens interface allows templating of custom tokens



used for HTML renderings of content. You can access this interface by clicking the Edit button beneath the "Custom HTML Tokens" button on the Server Files tab of the Server Setup interface.



So far, the only type of token that can be configured from this interface is a regular expression token. Traction applies regular expression tokens at display time by scanning text tokens for sequences that match a given regular expression, and replacing all such occurrences with some other specified text. For example, one standard regular expression token that ships with Traction version 3.7 is a UPS™ tracking number token, that searches for alphanumeric sequences that have the same format as any of the known UPS™ tracking number formats, and replaces them with links to the UPS™ website's package tracking system, allowing a user to click on that link to view the tracking information for that package.

Custom HTML tokens represent one of Traction's advanced customization capabilities that most administrators will not have to use, but here is a walk-through for creating your own custom HTML regular expression token.

Token Description

First, we'll type a description for our token. The example we'll use here will be a token to match a key into a fictional company's sales reporting database.

Token Description

Add an expanded description of the custom token.

Matches database identifiers for our sales report system, and replaces them with a link to that report via the web-based front-end for the sales database system.

This description will help other administrators understand the purpose of this token.

Regular Expression Pattern Text

Next, we'll need to author a regular expression to match our fictional sales database key strings. In our example, the database keys come in one either of the following two formats:

4 uppercase letters, an optional dash ("-"), and 6 digits.



The letters "SDB", followed by an optional dash ("-"), and a 12 digit number, the first of which cannot be a 0.

Traction's regular expressions are based upon the functionality of the Java™ 2 Platform Standard Ed. 5.0's Pattern class. If you would like to review the regular expression rules in detail, please see the class documentation. In our case, the regular expression looks like this:

\b([A-Z]{4}-?[0-9]{6}b|SDB-?[1-9][0-9]{11})\b

Regular Expression Pattern

This is the regular expression pattern that is used to identify occurrences of this token. There is a special syntax for regular expression strings. Since the regular expression pattern feature is based upon Java's built-in Pattern class, please use the syntax outlined in the documentation for the Pattern class.

\b([A-Z]{4}-?[0-9]{6}|SDB-?[1-9][0-9]{11})\b

The \b matches word breaks, so their occurrence at the beginning and end of the pattern require that the text be its own word (i.e., not appear in the middle of a larger unbroken sequence). The numbers in brackets represent a reference to any one of the characters listed, and characters can be listed individually, or by range (e.g., A-Z). Numbers appearing in {curly braces} indicate that the preceding element (character or subsequence) should appear a certain number of times in succession. The question mark (?) indicates that the preceding element (character or subsequence) is optional (can appear or be omitted). The parentheses () form a capture group, which allows the formatting string used to create the replacement text to refer to portions of the original matched text.

Replacement Text: The "Formatting String"

The formatting string is the text that Traction will substitute for character strings that match the specified regular expression pattern. In our example, suppose we want to have a link that reads "Sales Report <ID>", and links into the tracking system with a URL of the form

http://salesdb.example.com/reports?key=<ID> (in both cases, <ID> refers to the sales report key our expression has helped us find). Our formatting string should look like this:

Sales Report {1}

Formatting String

This string will be substituted for each occurrence of the regular expression pattern.

Sales Report {1}

The 1 that appears in curly braces ($\{1\}$) refers to the portion of the text that was matched that was captured by the pattern's first capture group. In this case, that means it refers to the sales report database key (notice that we omitted the \b line break from our capture group so that extra spaces or breaks would not be included in the portion of the expression that we need to use in the replacement text to identify the report to which we want to link). The rest of the replacement text is an HTML ${\tt A}$ tag that is rendered as a link, and the clickable text of the link.

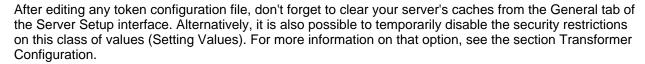
Note: Although basic HTML is accepted in this field, many tags, such as SCRIPT, IFRAME, OBJECT, and others, may be removed for security reasons. If you have a requirement for such markup, you can manually edit the token configuration file after you have saved it. The location of the file is given near the top of the page:



port Code

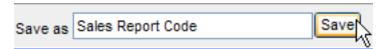
stances of a particular pattern with a given

- This mechanism is based upon Java's built-in regula not applied once only; instead, the input text has all
- in. (config/entry/tokens/html/regex001.properties)

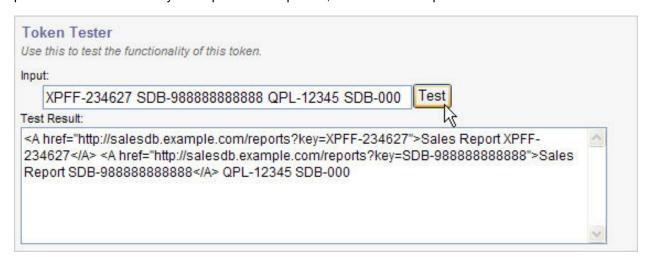


Saving and Testing the New Token

It is very important to test a new custom token configuration to make sure it's working properly. But we must first save it. We should choose a display name for the token that will help us easily identify it in the future, and then click the *Save* button at the bottom of the page.

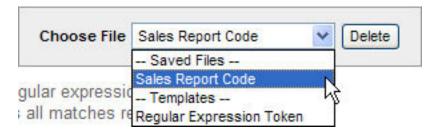


The save operation may take a moment, because adding a token configuration requires Traction to write a new token configuration file and then refresh its token configuration cache. After the operation completes, we can test our token by entering some sample text in the "Token Tester" section, and clicking the *Test* button. In the example here, we've used some test text that allows us to demonstrate that patterns that match exactly are replaced as expected, but other similar patterns are left intact:



Your saved token configuration can now be reviewed or edited by returning to this Edit Token interface and selecting it (by its display name) in the token file list in the top right corner of the page:





You may configure as many regular expression tokens as your Traction deployment requires, and your replacement text can take almost any form -- including nothing at all (effectively excising that information from displayed content, though it will still be visible to anyone who can edit the article in which the pattern appears). Be careful not to construct a regular expression that matches too broad a set of strings, so that you don't replace text that isn't a genuine instance of the type of expression you're trying to match.

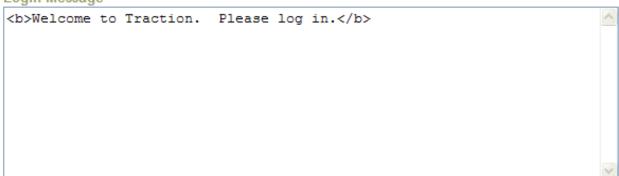
In the future, other types of customizable tokens (besides regular expression find-and-replace tokens) may be supported.

Login Message

Doc163: March 22, 2008 4:07 PM, Posted by Documentation Importer

This field lets you control the login message presented to users on a fresh login form.

Login Message



This field accepts basic HTML, including A tags (for links) and inline formatting tags (such as B, I, U, etc.).

Login Rejection Message

Doc164: March 22, 2008 4:07 PM, Posted by Documentation Importer

This field lets you control the message Traction displays when a user presents an invalid username or password.



Login Rejection Message

Oh no, you must have forgotten your password! If you can't remember, you can have Traction mail you a password change link. Click the "forgot your password?" link below.

This field accepts basic HTML, including A tags (for links) and inline formatting tags (such as B, I, U, etc.).

Thread Manager

Doc1085: July 12, 2009 3:21 PM, Posted by Christopher Nuzum

This view lets you see all the currently open connections and other threads running on your server. You can see the owner of the thread, how long it has been running, and what it is doing.

This is useful if you are planning to restart the server and want to know whether any users are currently active. It is also helpful for diagnosing other problems.

If your server is not behaving properly, this view lets you generate a complete thread trace, which you can copy to the clipboard and paste into a support request.

Maximum Heap Size

Doc168: March 22, 2008 4:08 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

When Restart is Enabled

You can control the maximum of memory to allow the Traction server to take up. For version 4.1, we recommend that you set this to 1500MB for 32-bit systems and 3000MB for 64-bit systems.

Maximum Heap Size 500 MB

This value will be passed to the JVM when the server starts. It indicates the maximum amount of memory that the JVM should allocate on its heap. After converting it to bytes, this size will be passed as the -Xmx parameter to the JVM.

When Restart is Not Enabled

If you do *not* use a restartable version of Traction (for example, if you run TractionNoRestart.exe) you should still set the maximum heap size here to match the memory allocation passed in the .lax file used to launch Traction. For example, if you use the TractionNoRestart.exe to launch Traction, your



TractionNoRestart.lax will include a line like:

LAX.NL.JAVA.OPTION.ADDITIONAL

sets maximum memory usage and turns on reduced signal flag

lax.nl.java.option.additional=-Xrs -Xmx768000000

In this case, you should *still* set the Maximum Heap Size setting to 768, in order to have the Memory Cleanup Threshold computed correctly. Failing to do this may lead to exhaustion of memory resources.

Memory Cleanup Threshold

Doc170: March 22, 2008 4:08 PM, Posted by Documentation Importer [image Doc170@1]

When the memory in use by your Traction server reaches this percentage of the amount specified in Maximum Heap Size, the Memory Cleanup Action is performed. We recommend a value of between 80% and 90% for this value.

Memory Cleanup Action

Doc169: March 22, 2008 4:08 PM, Posted by Documentation Importer, Edited by Christopher Nuzum When the Memory Cleanup Threshold is reached, the action selected here is performed.

Memory Cleanup Action

- None
- Flush Journal Cache
- Flush Journal and Server Caches
- Flush Journal and Server Caches, then force Garbage Collect

We recommend using the last setting, which will free up as much memory as possible.

Definitions

- The **Journal Cache** stores Traction articles. Normally, most articles are read once into the cache and then served from memory. Articles that have not been displayed for the longest period of time are rotated out of the cache to make room for new articles.
- The **Server Cache** stores configuration settings, like parsed SDL and .properties files, and data obtained from external directory servers.
- Garbage Collection is Java's way of freeing memory.



Runtime Cache Size

Doc235: March 22, 2008 4:16 PM, Posted by Documentation Importer

The runtime cache size setting is denominated in percentage with respect to the maximum heap size. The default value is 20%.

Runtime Cache Size

20.0

% of Maximum Heap Size

JVM Options

Doc150: March 22, 2008 4:06 PM, Posted by Documentation Importer

Traction is a pure Java application, and it is sometimes necessary or useful to pass custom command line arguments to the Java Virtual Machine in which the Traction server process is running.

JVM Options

StartTraction will pass these parameters to the Traction server.

This field is present mainly to make it easier for Traction Software's support staff to fine tune the operation of the JVM used to run your Traction server. Unless you have experience with Java command line parameters, and you fully understand the effects of the command line arguments you plan to supply; or you have prior instructions from Traction Software's support staff, it is not recommended that you make any changes to this field.

Temporary Files

Doc285: March 22, 2008 4:21 PM, Posted by Documentation Importer

This control lets you remove temporary files older than a specified age. The number and size of temporary files is listed.

Temporary Files

Temporary files are generally used for files uploaded to the server as attachments to articles although, any multipart post can result in a temp file. Sometimes, if the request is cancelled by the user, these files are not automatically deleted.

There are currently 138 temp files taking up 6.5 MB. Some of these may be attached to drafts, templates, or in-progress posts.

Delete all unreferenced files older than 3

3 days?

Delete Files



Temporary files that are attached to saved drafts will not be affected by this operation. However, files that have been uploaded by users who are actively in the process of creating a new article have no such protection. To give these users a time cushion to ensure that they have time to finalize their article, it is recommended to accept the default value of 3 days for the minimum age of files to be deleted. The main source of older temporary files is users who cancel creation of a new article after uploading files without using the post form's "Cancel" button, so deleting temporary files that have been on the server for longer than 3 days is usually safe.

Shared Folders

Doc265: March 22, 2008 4:19 PM, Posted by Documentation Importer

This list gives you a launch point to explore the various built-in folders that Traction is configured to serve.

Shared Folders
Browse Shared Folders
Public Folder (/pub)
Project Share Folder (/db/share)
Server Root Folder (/)

Server Setup - Email Tab

Doc251: March 22, 2008 4:17 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

On the Email tab, you can: Enable Incoming Email; specify an Outgoing Email (SMTP) Server; specify a collection of articles to be made available as templates; specify the Email Reply Format and Include Traction Links in Email Replies for email reply articles; and configure whether Traction's Enable Digest will be sent, when it will be sent, who will receive it, and which projects' content will be eligible for inclusion.

Enable Incoming Email

Doc89: March 22, 2008 3:57 PM, Posted by Documentation Importer

This control acts as a master switch for email. If it is not checked, email will not be ingested by any project, regardless of that project's mailbox settings.

Enable Incoming Email
Unchecking this prevents all projects from reading their mailboxes.

The section Configuring Projects to Read Mail explains how to set up project mailboxes.

Project Mail Server Settings



Doc209: March 22, 2008 4:12 PM, Posted by Documentation Importer

Project Mailbox Settings

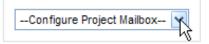
Each project has its own mailbox settings. Default settings for many of the project settings can be specified using the Configuring Projects to Read Mail section of the Server Email Settings window.

Getting to the Project Mailbox Settings

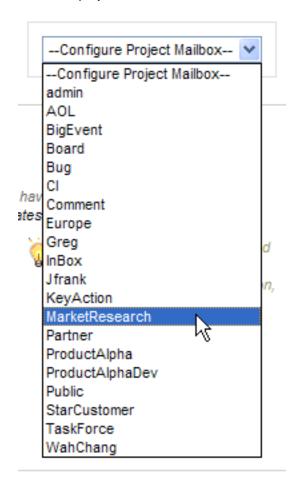
From Server Email Settings

There is a pull-down menu next to the Default Project Mailbox Settings title that lets you choose a project.

Default Project Mailbox Settings



Choose a project from the list.



This will take you to the Project Mailbox Settings window for the selected project.

From Project Setup



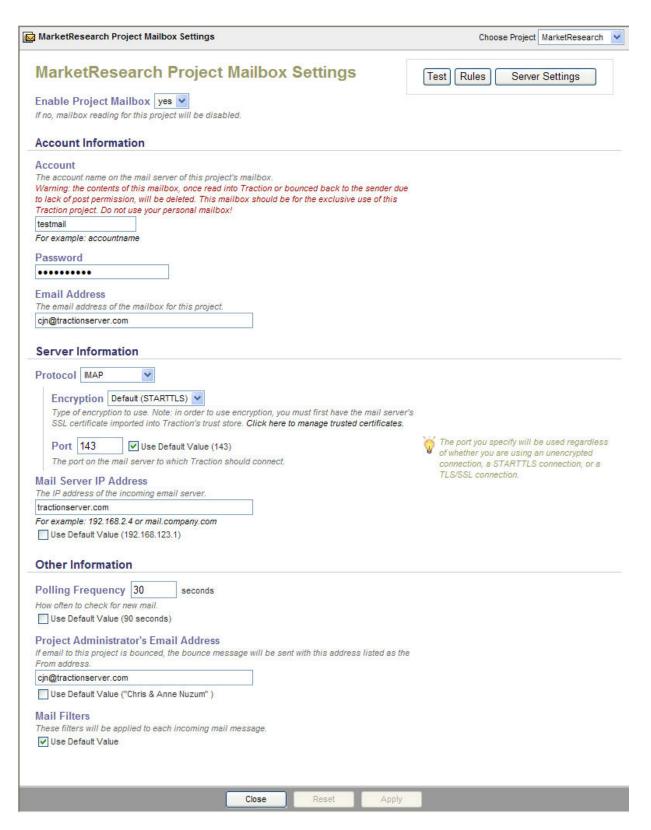
On the Mailbox tab of Project Setup, click the button *Edit Mail Server Settings* to launch the *Project Mailbox Settings* window.



The Project Mailbox Settings Window

Either of the two methods described above will launch the settings window.







Most of the settings on this page work exactly as described in the Configuring Projects to Read Mail section.

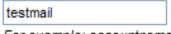
There are a few additional controls that appear only on this page:

Account

Account

The account name on the mail server of this project's mailbox.

Warning: the contents of this mailbox, once read into Traction or bounced back to the sender due to lack of post permission, will be deleted. This mailbox should be for the exclusive use of this Traction project. Do not use your personal mailbox!



For example: accountname

Here you enter the POP or IMAP account name of the mailbox on the mail server. This is the account Traction will use to log in to the mail server. Please note the warning in red and *do not use your own personal mailbox* -- all email in the account will be posted to the Traction project (if the sender has post permissions) or otherwise bounced to the original sender.

Password

Password	
•••••	

This is the password corresponding to the above username. It is stored encrypted in the Traction journal.

Email Address

Email Address

The email address of the mailbox for this project.

testmail@tractionserver.com

This is the actual address to which email should be sent. It will be displayed in user-visible views in order to inform people where to send email intended for this project.

Testing Email

Once all of the information on the page is correct, you can press the *Test* button.



This will attempt to contact the mailbox and will report success or failure. If the test does not succeed, the



error message displayed at the bottom should help you to diagnose the problem.



Traction Project Mail Setup Test

Protocol	imap
Host	tractionserver.com
useStartTLS	yes
port	143
Account	testmail
Password	
imap connection timeout	30000
imap timeout	30000

Contacting mail server...success

Determining mail folder... success

Opening mail folder... success

Counting messages in folder... success. (There are 0

messages in the mailbox)

Closing the mailbox folder... success.

Closing the mail store... success.

SMTP Server Test

Checking mail administrator's address... success.

SMTP Server information:

Requires POP pre-authentication:	no
SMTP server:	
Requires SMTP authentication:	yes
SMTP authentication username:	
SMTP authentication password	
SMTP connection timeout:	30000
SMTP data timeout:	30000
Use STARTTLS if available	yes
Use SMTPS	no
SMTP Port	587

Testing the SMTP configuration by attempting to send a message to cjn@tractionserver.com... success.

All tests succeeded. Mail settings appear to be configured properly.



The *Rules* button takes you to the *Mailbox* page in *Project Setup*, where you can Project Mail Rules. The *Server Settings* link takes you to the Configuring Projects to Read Mail section of the Server Email Settings window.

Configuring Projects to Read Mail

Doc44: March 22, 2008 3:51 PM, Posted by Documentation Importer

Setting Project Defaults at the Server Level

Each Traction project can be assigned a POP3 or IMAP4 mailbox, which it can poll on a specified interval. Mail messages and their attachments can be posted to that Project provided that the permissions settings of the project allow the sender to post via email.

Setting Mail Server Defaults

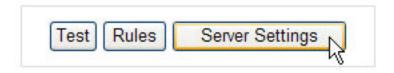
In order to simplify configuring many mailboxes on the same mail server, you can specify default settings for a mail server in Server Setup. Then, for each Project, you need only enter the username and password for the Project's mailbox.

You do not need to configure defaults; it is just a convenience.

Default project mailbox settings are specified on the Server Email Settings dialog, which you can launch from Server Setup | email by clicking the Advanced Settings button.

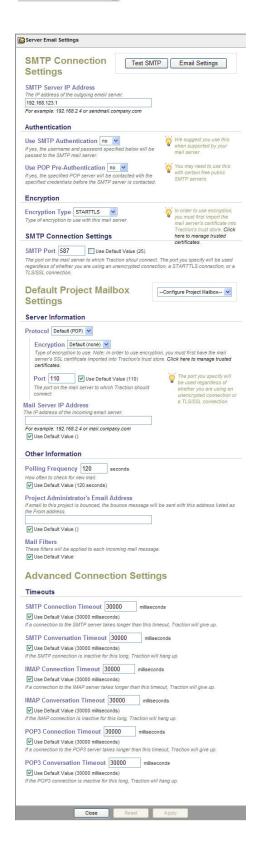


Alternatively, you can click the Server Settings button in any Project Mailbox Settings window.



This displays the Server Email Settings window. This window is divided into three sections: SMTP Connection Settings, Default Project Mailbox Settings., and Advanced Connection Settings.





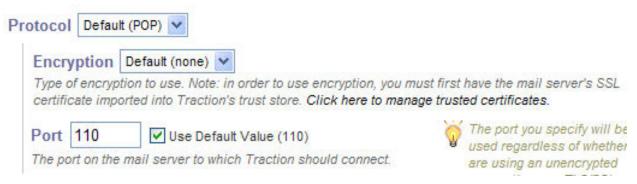


Server Information

Many of the values below have defaults listed. To apply a default, click the "use default" checkbox. The value will be reset to the default when you click the Apply button to apply your changes.

Protocol and Encryption

Select the protocol you would like to use with your mail server. You can choose POP or IMAP. Depending on your selection, the options underneath will change.



With POP, you can choose SSL. POP3 over SSL is usually referred to as POP3S.



With IMAP, you can choose STARTTLS or SSL. IMAP over SSL is referred to as IMAPS. Most administrators prefer STARTTLS to IMAPS, which is considered to be deprecated on most systems.





Important! If your mail server's certificate is not signed by a top-level certificate authority, you must configure Traction to trust your mail server. You do this using the Using the Trust Manager, which you can launch using the link in the tip text.

ore. Click here to manage trusted certificates.

The port you soe

The best time to use the Trust Manager is after testing your mailbox and getting the error:

javax.mail.MessagingException: * BYE JavaMail Exception:

javax.net.ssl.SSLHandshakeException:

sun.security.validator.ValidatorException: No trusted certificate found;
nested exception is: com.sun.mail.iap.ProtocolException: * BYE JavaMail
Exception: javax.net.ssl.SSLHandshakeException:

sun.security.validator.ValidatorException: No trusted certificate found. An example of doing this is provided below.

Port

Choose the port that your mail server uses for the protocol you chose.

The following table lists the default ports for the various protocols:

Protocol	Default Port
IMAP (with or without STARTTLS)	143
IMAPS	993
POP3	110
POP3S	995

Other Information

Polling Frequency

This control lets you specify how frequently projects should check for new mail.

Other Information

Polling Frequency 120 seconds

How often to check for new mail.

✓ Use Default Value (120 seconds)

Project Administrator's Email Address



If mail to a given project can not be posted, due to permissions, Traction will send an explanation to the sender. List here the address you would like those messages to be sent from.

Project Administrator's Email Address

If email to this project is bounced, the bounce message will be sent with this address listed as the From address.



Note: by default, bounce messages will *not* be sent to people who do not have a Traction account. If you want bounce messages to be sent to these people, set emailreceipttovisitor=true in Traction.properties while the server is shut down. By default, bounce messages *will* be sent to registered users if their posts are rejected. To turn these bounce messages off, you can set emailreceipttouser=false. There is currently no web interface to control these settings.

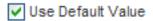
Mail Filters

You can control what mail filters are enabled. Mail filters are plug-ins that can evaluate, reject, or transform incoming email messages before they are posted.

Normally the default mail filters are enabled.

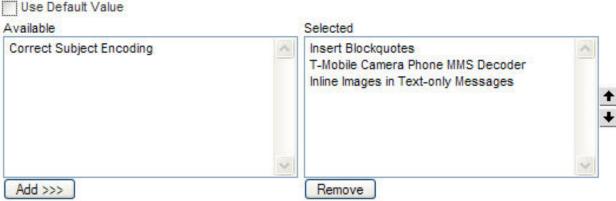
Mail Filters

These filters will be applied to each incoming mail message.



If you un-check the *Use Default Value* selection, the interface expands to show the list of mail filters installed in the server.

Mail Filters



The filters listed in the Selected column are evaluated in the order in which they appear in this list. You can change the order by selecting a filter and clicking the up and down arrows. If you would like to disable a filter, you can select it an click *Remove*. To enable a disabled filter, click *Add*.



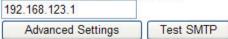
Configuring SMTP

Doc45: March 22, 2008 3:51 PM, Posted by Documentation Importer

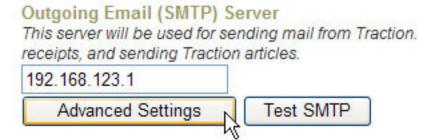
On the Server Setup | Email tab you can specify the address of an SMTP server.

Outgoing Email (SMTP) Server

This server will be used for sending mail from Traction. It must be specified to enable any outgoing email, such as digests, return receipts, and sending Traction articles.

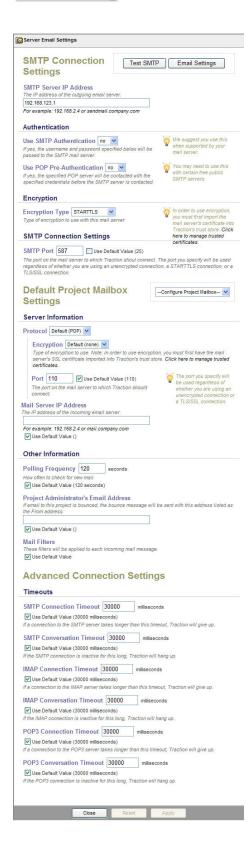


Many more options are available in the Advanced Settings window, which you can access by clicking the Advanced Settings button.



This displays the Server Email Settings window. This window is divided into three sections: SMTP Connection Settings, Default Project Mailbox Settings., and Advanced Connection Settings.







SMTP Server IP Address

Enter the IP address of your SMTP server here.

SMTP Server IP Address

The IP address of the outgoing email server.

192.168.123.1

For example: 192.168.2.4 or sendmail.company.com

Authentication

This governs how Traction authenticates to your SMTP server.

Use SMTP Authentication

If your server supports authentication, we suggest you change this setting from no to yes.

Use SMTP Authentication no leading in the second of the se

This will open up a username and password control:

Use SMTP Authentication yes

If yes, the username and password specified below will be passed to the SMTP mail server.

Account
test
For example: myaccount
Password
•••••

Enter the username and password of a user who is allowed to send mail using your SMTP server.

Important! Note: The password will be stored encrypted in Traction. When testing SMTP, the password will be disclosed to server administrators. Users who do not have Administer Server permissions will not see the password.

Use POP Pre-Authentication

While relatively rare, some mail providers require that you read email from their POP server before you



can send email using their SMTP server.

Use POP Pre-Authentication no V

If yes, the specified POP server will be contacted with the specified credentials before the SMTP server is contacted.

If your provider requires this type of authentication, change this setting to yes.

Use POP Pre-Authentication yes

If yes, the specified POP server will be contacted with the specified credentials before the SMTP server is contacted.

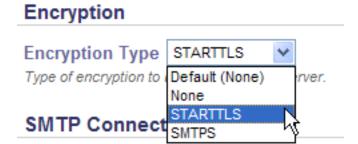
Server	
192.168.123.1	
For example: pop3.publicsmtpserver	.com
Account	
test	
Password	
•••••	

Enter the POP server's IP address, and the appropriate email account's username and password.

Note: No mail will be downloaded or deleted from the specified account.

Encryption

Traction supports both STARTTLS and SMTPS protocols.



Most administrators prefer STARTTLS, wherein a secure connection is negotiated after making an unencrypted connection if both the client and server support the protocol.

Traction also supports SMTPS, which opens an SSL connection to SMTP server running on a specific port.



Important! If your mail server's certificate is not signed by a top-level certificate authority, you must configure Traction to trust your mail server. You do this using the Using the Trust Manager, which you can launch using the link in the tip text.



The best time to launch the Trust Manager is after you have tried to test your connection and gotten the error: javax.mail.MessagingException: Can't send command to SMTP host; nested exception is: javax.net.ssl.SSLHandshakeException: sun.security.validator.ValidatorException: No trusted certificate found. The server's certificate will then be listed in the list of untrusted certificates and can be added to the list of trusted certificates with one click. This is covered in the example below.

SMTP Connection Settings

SMTP Port

This control lets you identify what port your SMTP server runs on.

SMTP Port	587	Use Default Value (25)
-----------	-----	------------------------

The port on the mail server to which Traction shoul connect. The port you specify will be used regardless of whether you are using an unencrypted connection, a STARTTLS connection, or a TLS/SSL connection.

The two most popular ports for SMTP are 25 and 587. Many systems enforce a 20-second wail period before sending mail on port 25. If you are using SMTPS you will need to enter the port your SMTPS server runs on, normally 465.

Timeouts

The final SMTP options you may need to modify are in the Advanced Connection Settings section.

Advanced Connection Settings

Timeouts SMTP Connection Timeout 30000 milliseconds ✓ Use Default Value (30000 milliseconds) If a connection to the SMTP server takes longer than this timeout, Traction will give up. SMTP Conversation Timeout 30000 milliseconds ✓ Use Default Value (30000 milliseconds) If the SMTP connection is inactive for this long, Traction will hang up.



Connection Timeout

The Connection Timeout governs how long Traction will wait for an SMTP server to answer a connection request.. If your server has a very long timeout specified (sometimes done to prevent abuse) you may need to increase this number.

Conversation Timeout

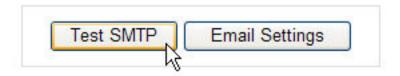
This setting controls how long Traction will wait for a non-responsive mail server before terminating the connection and abandoning the attempt to send mail.

Saving and Testing the Configuration

When you believe the settings have been entered correctly, click the Apply button at the bottom of the page.

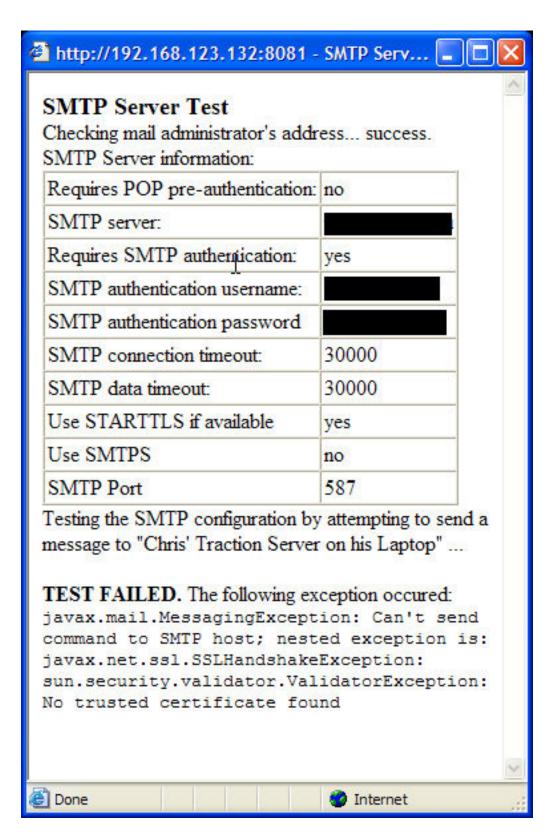


After you apply your changes, the Test SMTP button at the top of the page becomes enabled.



A window pops up showing the test results.







If you see the error listed, you need to add your mail server's certificate to the list of trusted certificates.

To do this, launch the trust manager by clicking the link next to the Encryption Type selector.

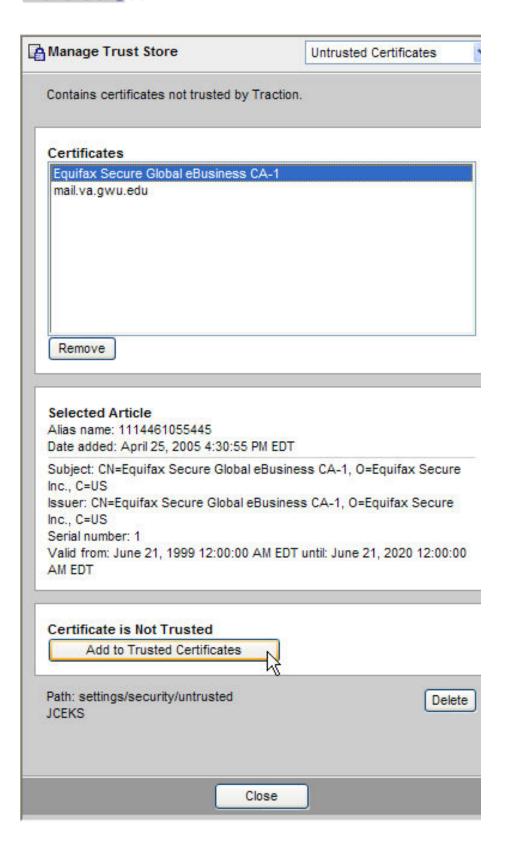


When the Trust Manager pops up, navigate to the list of Untrusted Certificates.



Select each certificate by clicking its name in the top panel, then click the button "Add to Trusted Certificates".







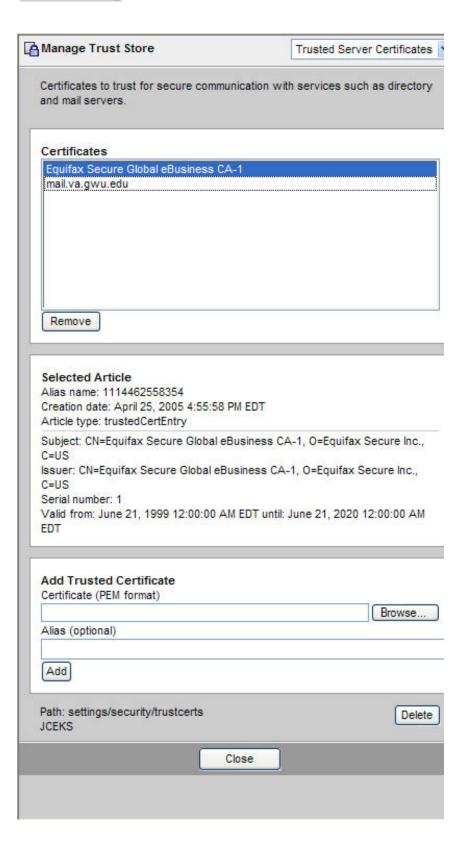
Each certificate you add will disappear from this page.

You can now switch to the page that lists the Trusted Certificates:



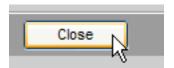
This page lets you verify and edit the list of trusted certificates. You can also upload a certificate to this page directly using the Browse button.





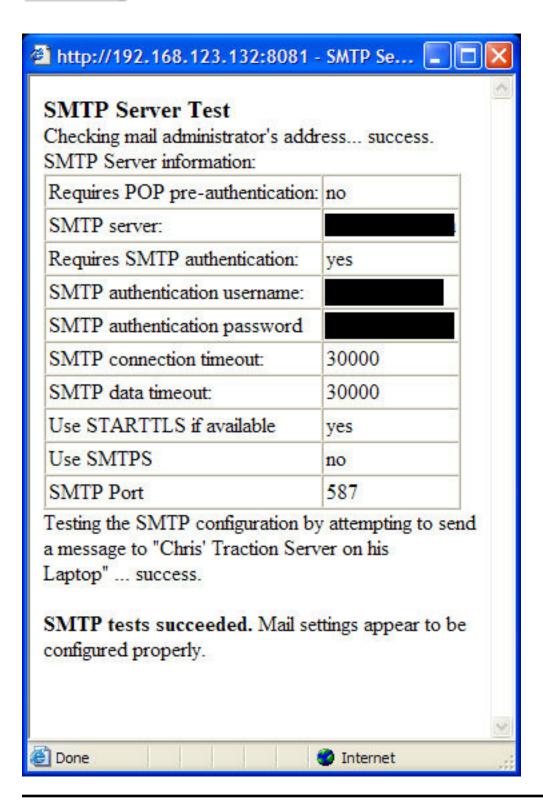


You can now close the window and repeat your mail test.



After you repeat the test, you should see the message, "SMTP tests succeeded. Mail settings appear to be configured properly."







Enable Digest

Doc88: March 22, 2008 3:57 PM, Posted by Documentation Importer

This control operates as a master switch for the email Executive Summary digest. If unchecked, no digests will be sent, regardless of any other configuration settings.

Enable Digest 🗹

If this is unchecked, Traction will not send email digests.

Digest Reply-to Address (Mail Digest Administrator)

Doc68: March 22, 2008 3:54 PM, Posted by Documentation Importer

Digest Reply-to Address (Mail Digest Administrator)

If someone attempts to reply to an automatically generated digest, mail will be sent to this address. This is used to prevent mail loops. The address must be valid. If you would like to use a friendly name for the Sender, it can be specified using the following format: "Digest Sender" <sender@yourdomain.com>

"Chris' Traction Server on his Laptop" <cjn@tractionserver.com>

This control lets you specify the address that is used as the From and Reply-to addresses for email digests sent by Traction. It must be specified.

You can enter just an email address, e.g. cjn@tractionsoftware.com, or you can enter both an address and a name, as shown above.

This person is also referred to as the *Mail Digest Administrator* because email replies, bounce messages, and out-of-office notifications triggered by the digest will be directed to this email address.

Recipients of Server Digests

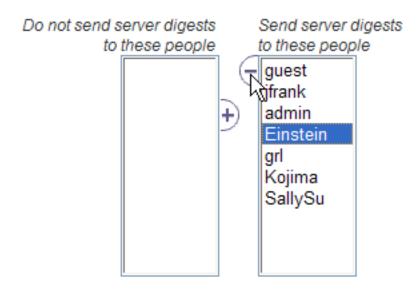
Doc233: March 22, 2008 4:15 PM, Posted by Documentation Importer

This section lets you controls what users are signed up to receive the default server digests.



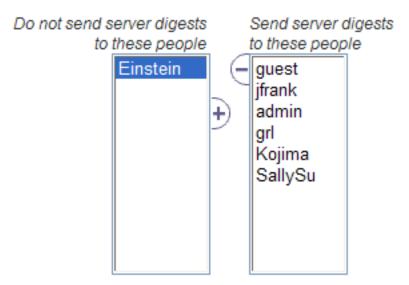
Recipients of Server Digests

Use the +) and (- tabs to select the default recipients for the server digests.



By default, all users with an email address configured in Personal Information are added to the digest.

To remove users from the list, select the users you wish to remove and click the (- button. You can move users in the other direction using the +) button.



By removing the user from the list, you are making the same change that users can make in opting out of the server digest using the Personal Preferences preference.

Click Apply to activate your changes.

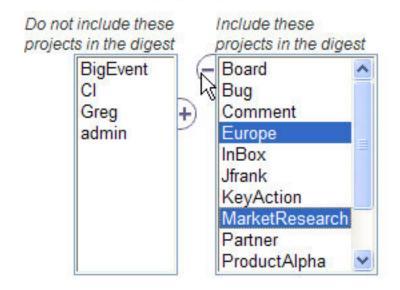


Projects to Include in DigestDoc224: March 22, 2008 4:14 PM, Posted by Documentation Importer

By default, all projects are eligible to have their content included in the digest. If you wish to exclude a project from ever having its content appear in any digest, you can select the projects you wish to exclude from the included column and click the (- button.

Projects to include in Digest

Use the +) and (- tabs to select which projects you wish to include in the digest.

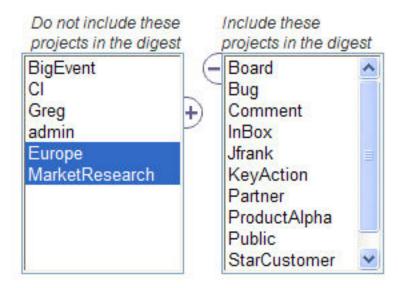


These projects will be moved to the excluded column.



Projects to include in Digest

Use the +) and (- tabs to select which projects you wish to include in the digest.



You must press Apply for these changes to take effect.

See the Digest Projects topic for help on changing what projects' content is included in digests.

Send Digest Now

Doc240: March 22, 2008 4:16 PM, Posted by Documentation Importer You can send a digest at any time by clicking this button.

Send Digest Now



If you wish to send a digest immediately, click the Go button. The next regularly scheduled digest will be sent on schedule, but will only have articles which have been added since the one you send now.

When you are just getting started, this button provides a good way to test that everything is configured properly. Just remember that after you send a digest, you need to post one or more new articles before another digest can be sent.

Email Reply Format

Doc82: March 22, 2008 3:56 PM, Posted and Edited by Documentation Importer

Type topic text here.



Include Traction Links in Email Replies

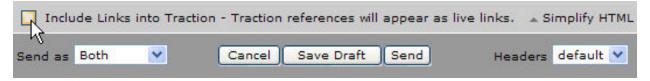
Doc135: March 22, 2008 4:04 PM, Posted and Edited by Documentation Importer

This setting allows server administrators to control whether live links back to Traction server are embedded in the body of email reply messages. If email replies are generally being sent to people who have no direct access to a Traction server, it is preferable to deactivate live links in email replies.

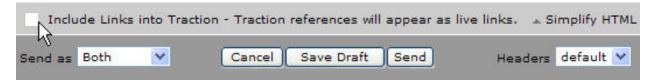
Include Traction Links in Email Replies Locked Locked

If this is checked, rapid selector cross references and other expressions included in the Email Reply Form will appear in the outgoing email. If this is unchecked, the expressions will still appear in the email, but they will not be live links back to the Traction Server.

The default setting is reflected in the *Email Reply* form.



If the *Locked* checkbox is checked, users will not be able to choose this setting on the *Email Reply* form. It might be a good idea to disable links into Traction if there are potential security concerns associated with making the address of the server known to third parties. Notice that in this case, the checkbox is still present, but is disabled (i.e., does not accept user input).



Outgoing Email Templates

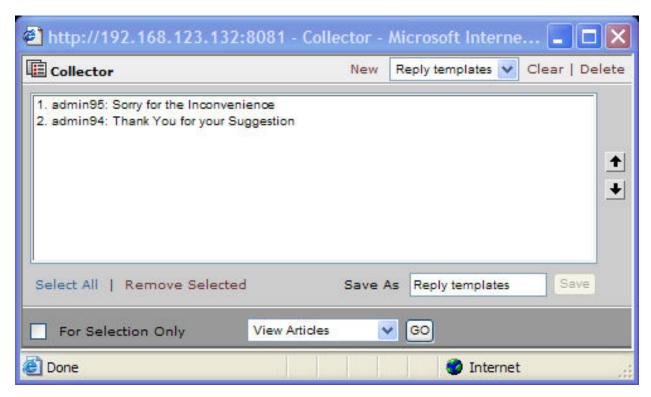
Doc188: March 22, 2008 4:10 PM, Posted by Documentation Importer, Edited by Jordan Frank

In many deployment scenarios, users will find that they need to repeatedly create articles that have the same general form and content. Two cases include (1) loading a template article into an email reply or add new article form or (2) launching a template from a section (see <u>Doc22</u>: <u>Sections Overview</u>). This page focuses on the first case.

An existing article can be loaded into an Add New Article or Email Reply form. This is especially common in the case of email replies (so the example below is organized around the email reply use case). You can designate any user's collection as the set of templates to use for email replies or any new articles.

Consider a collection like the one below (for more info on collections, see The Collector)





The articles in the collection can form the basis of email replies.



May 10, 2005

ģ.

admin95 (#) | TrackBack | May 10, 2005 | 1:05:30 PM EDT Posted by Chris Nuzum

Dear [person] -- We apologize for the inconvenence. 01 @

Sincerely, [you] 02 8



admin94 (#) | TrackBack | May 10, 2005 | 1:04:38 PM EDT Posted by Chris Nuzum

Dear [user] -- Thank you for your recent suggestion. We will consider it for a future release. 01 8

Collections to use for Templates can be designated in two places:

- 1) **Personal Templates**: My Account | Preferences | Editing Article Templates. Just select one of your Collections and hit Apply.
- 2) **Shared Templates:** Server Setup | Email | Composition Shared Article Templates. Select a User and then select one of their Collections, then hit Apply. Note: While all users will be able to see the contents of a given user's shared collection, the list of articles is permission filtered.

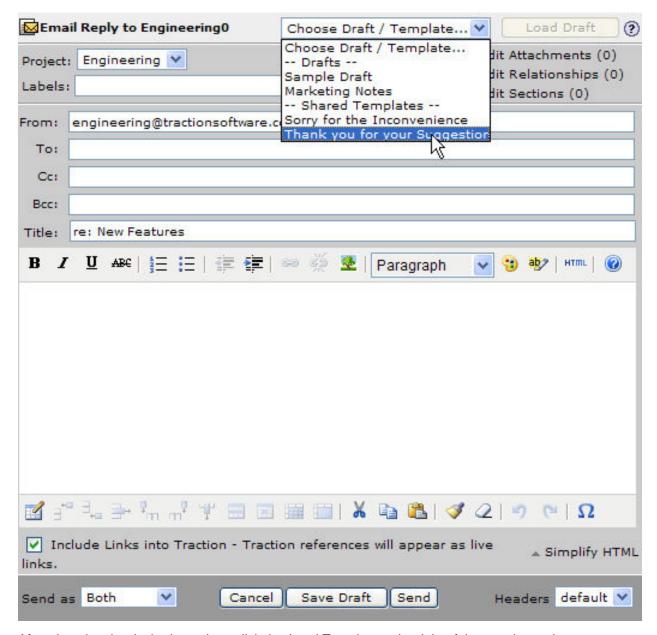
Now when you click Email Reply (or Add New Article) to an article posted via email,





You can choose a template from the *Choose Draft / Template* control.



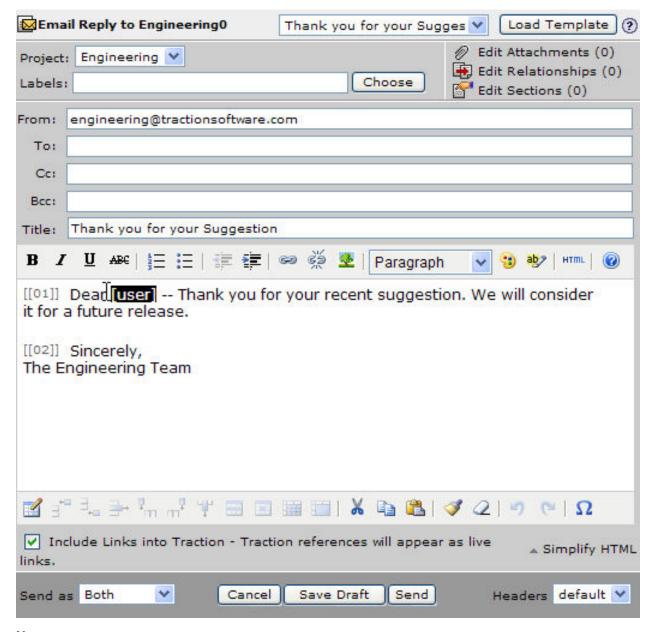


After choosing the desired template, click the *Load Template* to the right of the template selector.



The template entry's title, body, labels, plain-text mode setting, sections, and entry style are copied into the Email Reply form, and can be edited and personalized as necessary.





Notes:

- The templates visible to the user will depend on the user's permissions to read the template articles.
 Templates in projects a user can't read won't appear in the list of templates from which that user can choose.
- The person who owns the templates collection can add or remove templates over time.

Defaulting

Doc64: March 22, 2008 3:54 PM, Posted by Documentation Importer



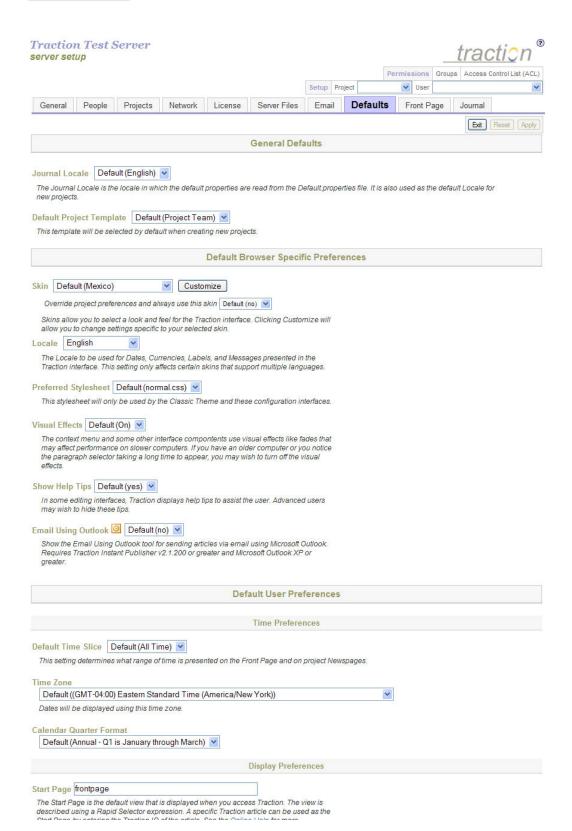
Traction has a simple defaulting system. You can set defaults for most project and user settings in Server Setup. Then you can override the defaults anytime you need to in Project or Personal setup.

Traction supports the following types of defaults:

- General Defaults apply globally.
- **Default Browser Specific Preferences** control settings that can be overridden on a per-user and per-browser basis. Per-browser settings are stored in cookies.
- Default User Preferences control settings that each user can modify in Personal Setup.
- **Default Project Preferences** control settings that project administrators can change in Project Setup.

The server setup defaults page is organized into the above sections.

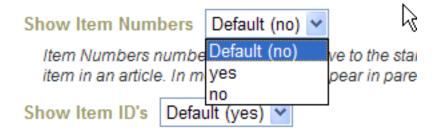




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Within other setup interfaces, you will generally find either a pull-down menu setting to use the default value, or a checkbox, depending on the type of the value being requested.



Comment depth 3

This is the depth to which comments on comments will be displayed in the single article view. If set to 0, no depth limit will be enforced.

✓ Use the default value (3)

If you specify to use the default, and the default changes, the current default will always apply. If you select an explicit value, a change to the default will not affect the value for the user or project that has overridden the default.

Journal Locale

Doc151: March 22, 2008 4:06 PM, Posted by Documentation Importer

Journal Locale Default (English)

The Journal Locale is the locale in which the default properties are read from the Default properties file. It is also used as the default Locale for new projects.

Each journal has a default locale, which determines the language of the ultimate defaults for the journal and which becomes the default locale for Server Setup - Project Tab created in the journal.

Default Project Template

Doc62: March 22, 2008 3:54 PM, Posted by Documentation Importer





This setting controls the template listed as the default template when Server Setup - Project Tab, or when copying sections or labels from a project template.

Skin Preference

Doc279: March 22, 2008 4:20 PM, Posted by Documentation Importer, Edited by Greg Lloyd

When set at the server level, this specifies the server's default skin. When set as a user preference, this sets the user's preferred skin for all browsers. When set at the browser level (via a cookie), this determines the skin to be used in that browser.



Skins allow you to select a look and feel for the Traction interface. Clicking Customize will allow you to change settings specific to your selected skin.

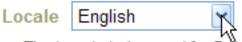
See Customizing Skin Settings for a description and examples of skin customization settings.

For more information on Traction skins, see Traction Skins.

Locale

Doc158: March 22, 2008 4:07 PM, Posted by Documentation Importer

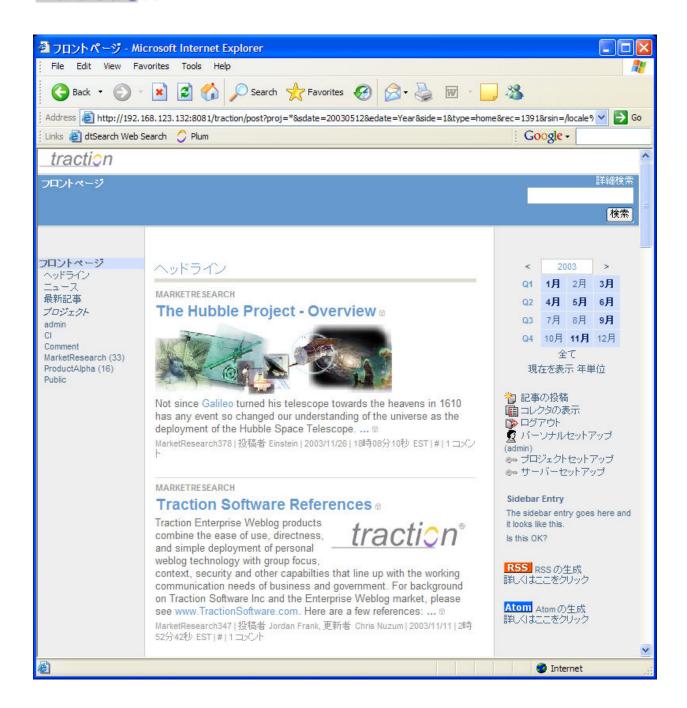
This controls the language used in Traction's web interface.



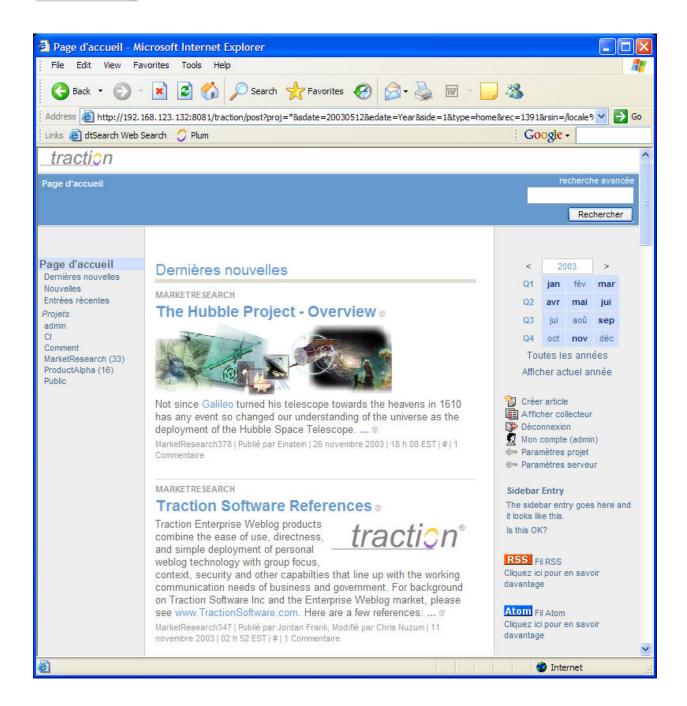
The Locale to be used for Dates, Currencies, Labels, and Messages presented in the Traction interface. This setting only affects certain skins that support multiple languages.

The examples below show the effect of choosing Japanese, French, German, and English.

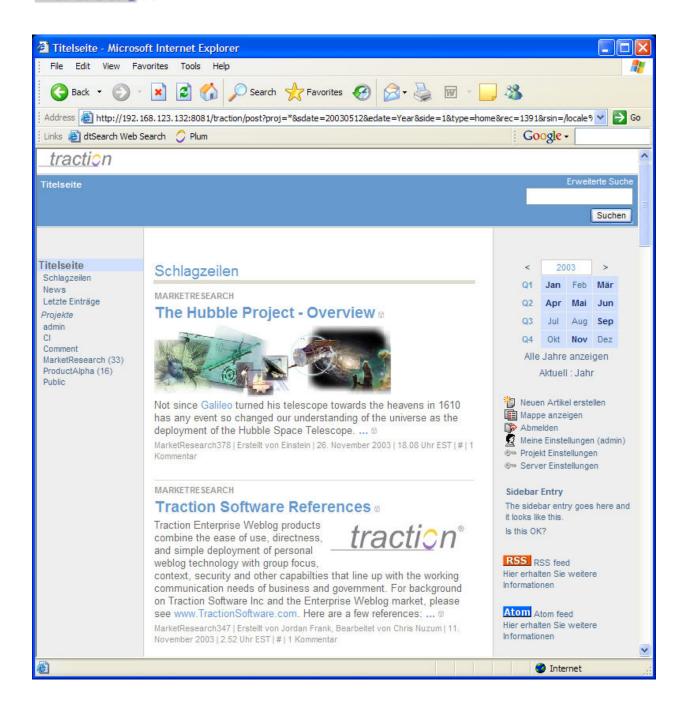




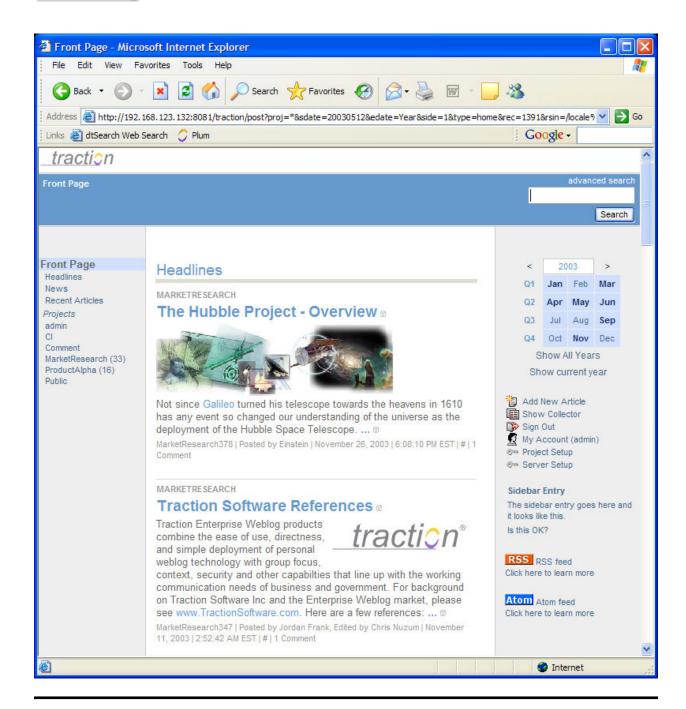












Preferred Stylesheet

Doc202: March 22, 2008 4:12 PM, Posted by Documentation Importer

This setting has been superceded by the Customizing Skin Settings and will be phased out.



Visual Effects

Doc321: March 22, 2008 4:26 PM, Posted by Documentation Importer

As of version 3.7, Traction's standard skins use an improved and more attractive set of context menus (right click menus). These new context menus and some other interface components may employ visual effects that can tax slower computers. Use this control to activate or deactivate these effects.

Visual Effects Default (On)

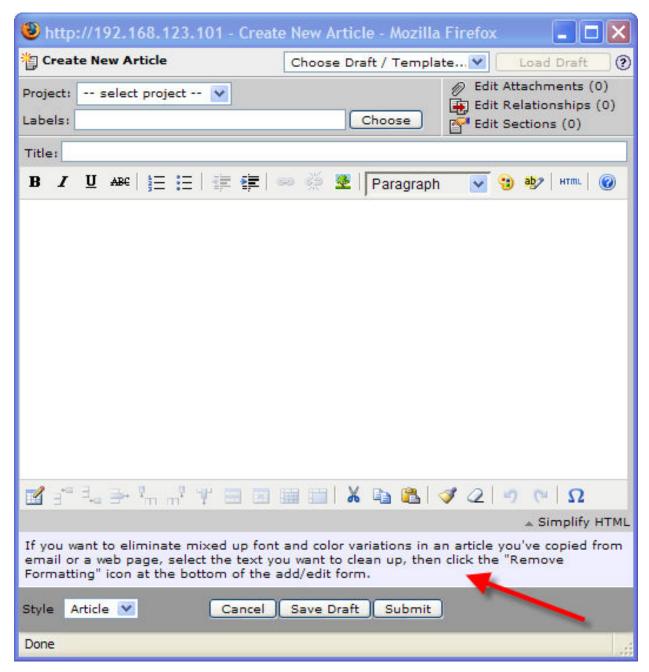
The context menu and some other interface components use visual effects like fades that may affect performance on slower computers. If you have an older computer or you notice the paragraph selector taking a long time to appear, you may wish to turn off the visual effects.

Show Help Tips

Doc270: March 22, 2008 4:20 PM, Posted by Documentation Importer

As of version 3.7, some views, such as the standard Create New Article view, include a tip that is chosen at random from a set of context sensitive helpful hints.





Some users may not need the information in the tips, or may find that they are an unnecessary distraction or waste of space. This control allows you to choose whether or not you want to see these tips.

Show Help Tips | Default (yes) 💌

In some editing interfaces, Traction displays help tips to assist the user. Advanced users may wish to hide these tips.



Email Using Outlook

Doc85: March 22, 2008 3:56 PM, Posted by Documentation Importer

Users who have both Microsoft Outlook XP or later and Traction Instant Publisher version 2.1.200 or later can choose to be presented with the "Email Using Outlook" tool in Traction's interfaces.



Show the Email Using Outlook tool for sending articles via email using Microsoft Outlook.

Requires Traction Instant Publisher v2.1.200 or greater and Microsoft Outlook XP or greater.

When this option is enabled, the "Email Using Outlook" tool will appear along with the standard "Email Articles" tool.



Navigation Mode

Doc1087: July 12, 2009 3:31 PM, Posted by Christopher Nuzum

This control lets you choose whether you wish by default to display only published articles and the published version of articles with drafts, or whether you would like to display draft articles and the latest draft version of published articles.

Installing Instant Publisher

Doc139: March 22, 2008 4:04 PM, Posted by Documentation Importer

Installing the Traction Instant Publisher (TIP)

Click on the *My Account* link from the *Tools* menu in your Traction browser. This takes you to your *My Account / Preferences* page.

There is a 3-step process to install the Instant Publisher:

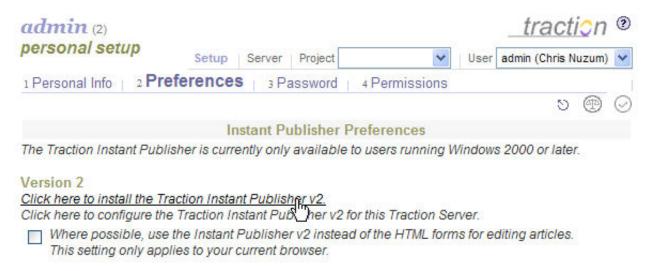
1. Installation



- Configuration (server, user name, password)
- 3. Replacing browser launched Add Article, Comment, and Edit forms.

Installation

Under Version 2, click where it says Click here to configure the Traction Instant Publisher v2.



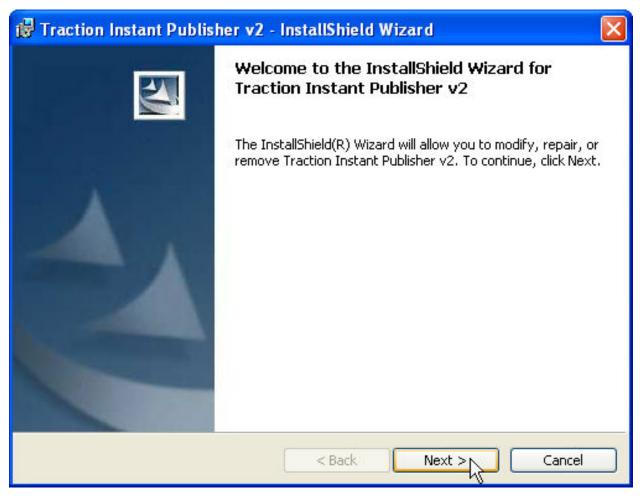
Click Open on the File Download menu.





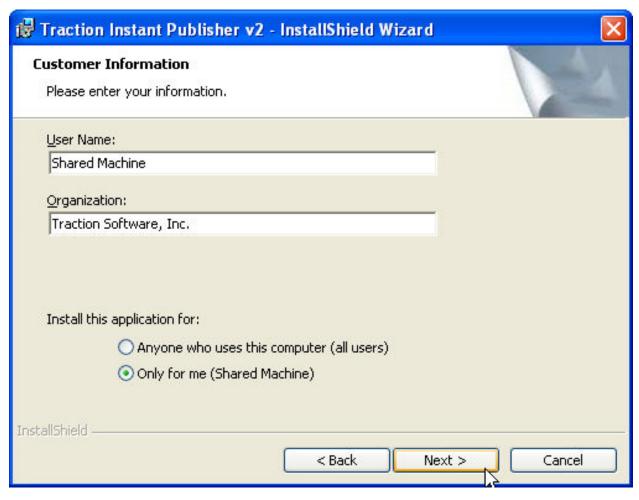
The install files will download and the installer will start up. Now click Next.





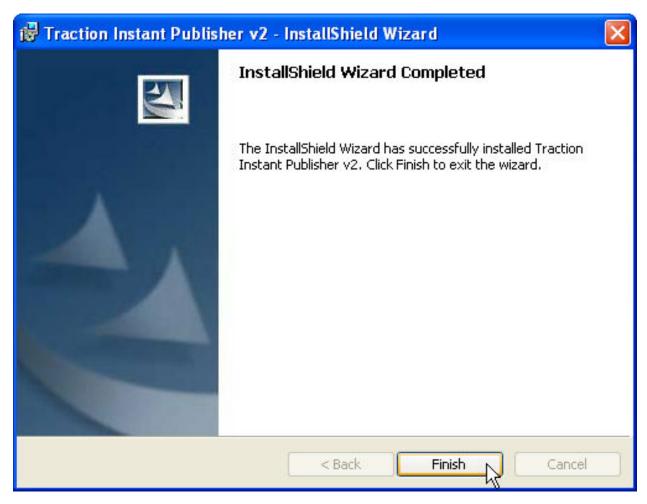
The following form should be filled in. If there is an option, select to install Only for me, then click Next.





The wizard will tell you that installation is complete. Click Finish.

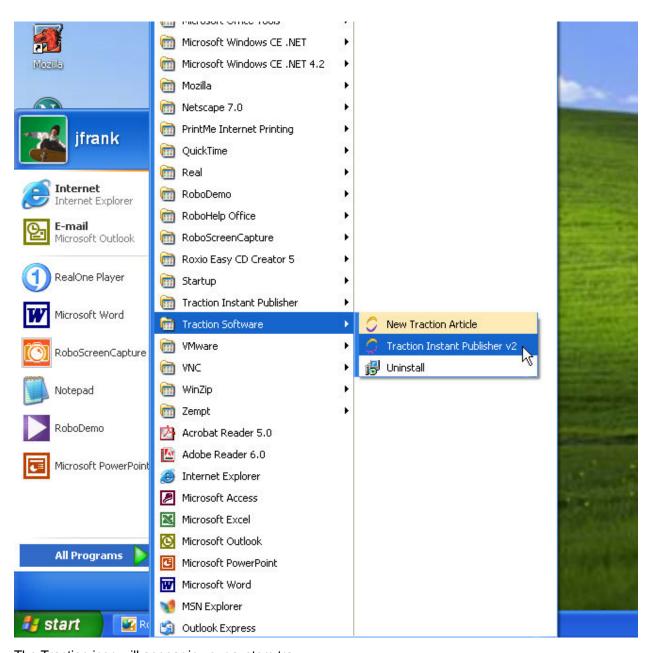




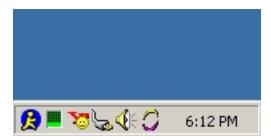
The Traction Instant Publisher is now installed and configured to publish to your server.

Now, to launch the publisher, you can navigate to *Start / Programs / Traction Software / Traction Instant Publisher V2*





The Traction icon will appear in your system tray





Configuration (Server, user name, password)

After installation, return to My Account | Preferences to configure the Instant Publisher. Click on the second line, as in the below image:

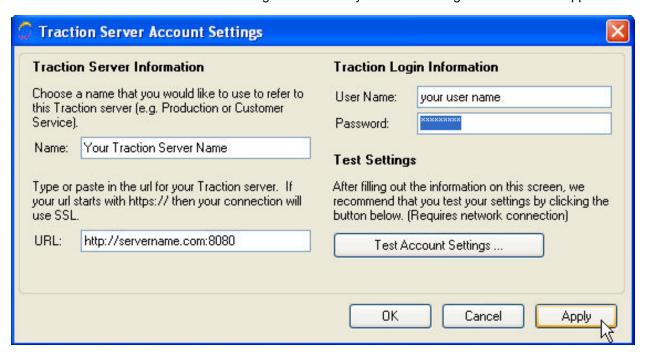
Version 2

Click here to install the Traction Instant Publisher v2.

Click here to configure the Traction Instant Publisher v2 for this Traction Server.

Where post_ble, use the Instant Publisher v2 instead of the HTML forms for editing articles.
This setting only applies to your current browser.

This will launch the Instant Publisher settings window with you server settings and user name applied.



Simply add your password and then click Apply. You can click Test Account Settings to verify that it is configured properly.

As of Instant Publisher Version 2.1, an Advanced button will also appear on this form. It is used when the URL used to contact the server differs from the URL with which the server identifies itself. In these cases, it is now possible to specify the mapping manually. For example, you might contact a server via HTTPS but the server may identify itself as running on HTTP.

Configuring your Instant Publisher for another Server

If you work with multiple Traction Servers, you can repeat this step on each server. The Instant Publisher has a menu where you select the server to which you want to publish.

Using the TIP instead of the HTML Add Article, Comment, and Edit forms.



The Instant Publisher can be configured as a substitute for the HTML *Add Article*, *Edit Article Consists of a Title, Text, Attachments and Labels* and *Comment* forms which you have learned about in previous sections of the User Guide. This will give you a WYSIWYG editor and a richer comment interface with the full capabilities of TIP V2.

To configure for Edit and Comment, click the *My Account* link. The *My Account* page will open to the *Preferences* page. In the Instant Publisher preferences section, check the box next to the text that says:

Where possible, use the Instant Publisher v2 instead of the HTML forms for editing articles.

This setting only applies to your current browser.

Then click the *Apply* icon in the upper right or bottom of the screen.

Instant Publisher Preferences

Doc145: March 22, 2008 4:06 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Instant Publisher Preferences

The Traction Instant Publisher is currently only available to users running Windows 2000 or later.

Version 2

Click here to install the Traction Instant Publisher v2.

Click here to configure the Traction Instant Publisher v2 for this Traction Server.

Where possible, use the Instant Publisher v2 instead of the HTML forms for editing articles. This setting only applies to your current browser.

The above two links and checkbox let you install, configure, and select the Traction Instant Publisher. See the section Installing Instant Publisher for instructions.

Other Instant Publisher Options

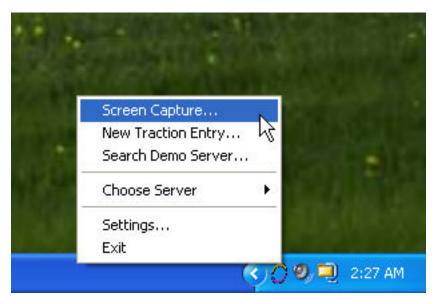
Doc186: March 22, 2008 4:10 PM, Posted by Documentation Importer

The Instant Publisher has a number of other conveniences that make it easy to get things into Traction:

Screen Capture

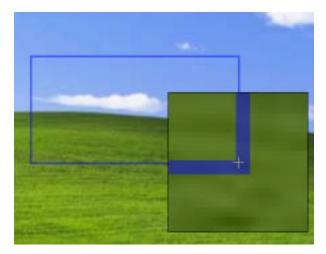
You can capture any region of the screen and post it using the screen capture option. When you choose *Screen Capture* from the TIP V2 menu, the cursor changes to a cross.





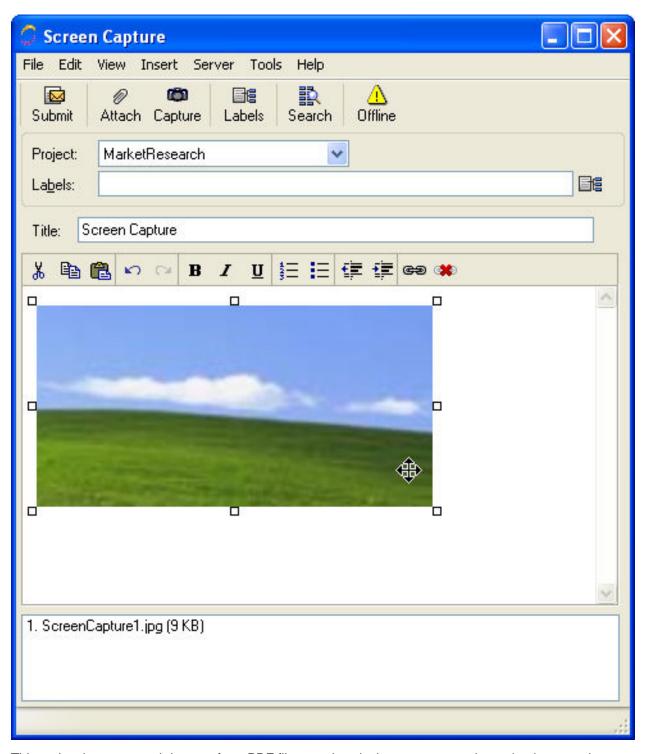
You can left-click and drag over a section of the screen.

Note: Hold down the Control and Shift keys together to zoom in while you drag.



When you let go, it will open a TIP V2 form with an image of the screen capture in the body of the form.



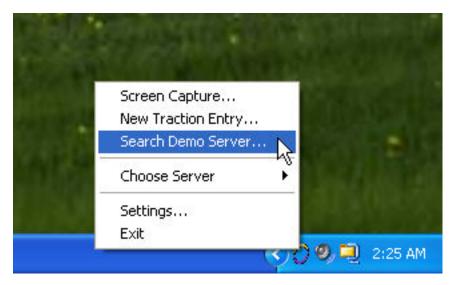


This makes it easy to grab images from PDF files or other desktop programs where simple cut and paste does not yield a nice looking result. You can capture additional regions once the Instant Publisher is open by clicking the camera icon on the button bar.



Search

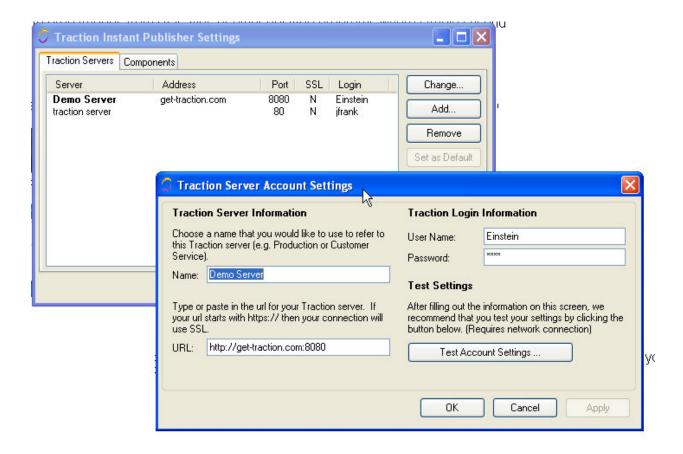
The instant publisher menu has a Search option. Choosing this option will open a browser and load the Advanced Search form in your browser.



Settings

Click the Settings option if you need to configure another server to which you want to publish or to change the settings (e.g. your name and password, or the server URL) of an existing server for which your Instant Publisher is configured.





Publishing an Article with Instant Publisher

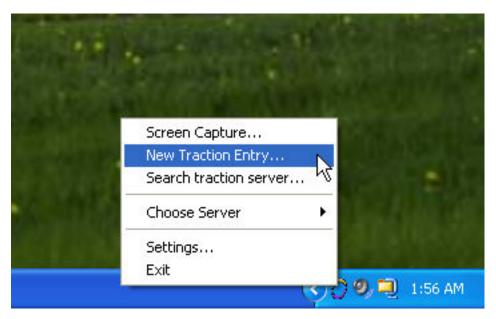
Doc225: March 22, 2008 4:14 PM, Posted by Documentation Importer

As an alternative to the *Add New Article* action from the Traction browser interface, you can choose the *New Traction Entry* option from the TIP V2 system tray menu.

The TIP includes basic HTML formatting options on the toolbar, and it supports drag & drop and cut & paste from most programs that support HTML or text.

First, right click on the Traction logo. A menu appears.





Left-click the New Article Consists of a Title, Text, Attachments and Labels option and the TIP V2 form will appear. (see below)

The TIP V2 form will appear. Like the *Add New Article* form, you can select a project, add a title and write text in the body. You can also:

1. **Screen Capture:** Put your cursor in the body of the form. Click on the button with a camera. The TIP V2 form will disappear and a cross-hair replaces your mouse. Left-click on the upper left of a section of the part of your screen you want to capture. Hold and Drag to the lower right of the area for selection. Then let go. An image will appear in the publisher window, where your cursor was.

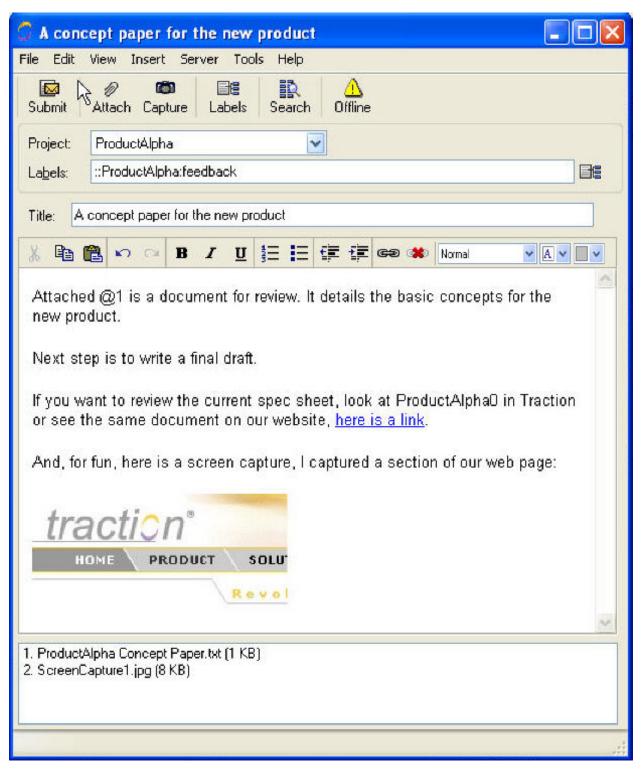
Tip: For precision capture, hold down the shift key to magnify the area of the screen under the cross-hair.

- 2. **Copy and Paste:** Copy any content from a desktop application. Paste into the publisher form. You can also drag and drop. If you drag and drop from Internet Explorer, TIP V2 may also include a link back to original source. Note, tables and other areas with complex formatting may or may not copy well, depending on the content.
- 3. **Apply Styles:** Apply font style (Bold, Italic, Underline), paragraph style (numbered list, bullet list, normal, Heading 1 etc..), font color, and background color.
- 4. **Insert a link to a website:** Write *Click Here* (or any other words), highlight the words, right-click, and select *Insert Link*. Paste the hyperlink into the box and click OK. This works for file, mail, and other links too.

Important Note: If you are linking to Traction Articles see the help section Making Links to Traction Articles

- 5. **Add Labels:** You can add labels at the article (title) or paragraph level. See Adding Labels with the Instant Publisher section below.
- 6. **Add an Attachment**: Simply drag a file into the Attachments window at the bottom of the TIP V2 form. Or, right click over the Attachment window and click to browse for a file.





Best Practice Tip: Always write a good first paragraph, this will appear in the ExecutiveSummary and in other views such as the multi-entry view and, in some cases, the front page and project newspage.



Adding Labels with the Instant Publisher

Labels can be added at the article (title) or paragraph level.

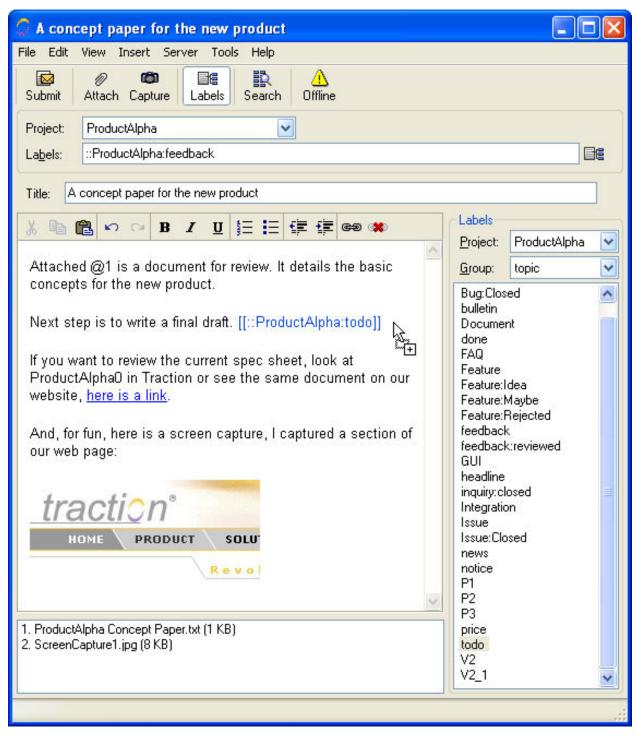
1. Article Level: To add labels to the article level, click the label chooser



to launch the Add a Label form. This form works the same as the Add New Article form.

2. **Paragraph Level**: To add labels to paragraphs, click the Labels button in the button bar. A project selector and label list appears at the right of the form. Left-click and drag a label to the end of a paragraph. It will appear in this format: [[::ProductAlpha:todo]] where ProductAlpha is the project name and Todo is the label name.





When you are satisfied with your entry, click *Submit* to send it to Traction. All the images in your selection are attached to the Traction article, see below for the result:

feedback



A concept paper for the new product

ProductAlpha102: November 25, 2003 2:24 am



⊕ Cross References; 2 Attachments

Attached @1 is a document for review. It details the basic concepts for the new product. 01 📓

Next step is to write a final draft. 02 📓



If you want to review the current spec sheet, look at ProductAlphaO: Traction TeamPage Spec Sheet in Traction or see the same document on our website, here is a link. 🗯 📓

And, for fun, here is a screen capture, I captured a section of our web page: 04 📓



Add a Comment on this Article



🍟 1. ProductAlpha Concept Paper.txt (1.2 KB)



🝟 2. ScreenCapture1.jpg (8.2 KB)

Related Entries:

references (1)

ProductAlphaO: Traction TeamPage Spec Sheet

The Traction Instant Publisher V2 (TIP V2)



Doc289: March 22, 2008 4:21 PM, Posted by Documentation Importer

The Traction® Instant Publisher™ (*TIP* for short) is an optional Windows application that, when loaded, will appear as a Traction logo in your system tray. TIP V2 runs using Microsoft's .NET which, if not already present on your system, will be installed when you install TIP V2. It supports rich text editing, drag and drop operation, screen capture, and management of file attachments.

TIP V2 makes it very fast and easy to:

- Publish: Compose new Traction articles, Right-Click Publish from Internet Explorer, and clip content from many desktop applications, capture in image of a portion of your screen
- Edit: You can choose to use the TIP V2 as your default editor
- Comment: You can choose to use the TIP V2 as your comment form

Default Time Slice

Doc63: March 22, 2008 3:54 PM, Posted by Documentation Importer

This preference allows a user to set their default time slice. In Traction, the term "time slice" refers to the starting and ending dates of for the range of time from which content is presented on a given page.

Time slice may be changed using a Navigating with the Rapid Selector, or by navigating with the calendar controls in most standard skins.

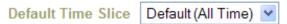


Changing time slice using the rapid selector.



Changing time slice using the calendar.

The default time slice refers to the time slice that is used when a user has not navigated into a specific time slice.



The term "time slice" refers to the starting and ending date of the range of time from which content is being displayed in a given page. The default time slice is used if none has been explicitly selected (by means of a rapid selector expression, an advanced search query, or calendar interface navigation).



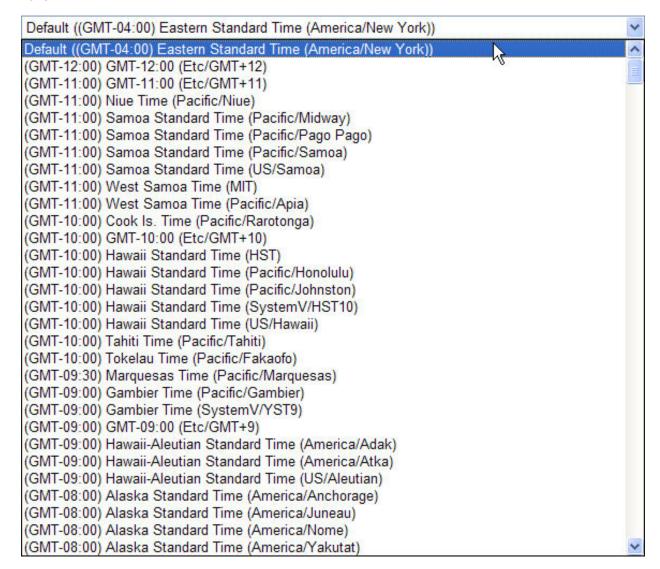
It is very common to set the default time slice to All Time so that content doesn't disappear at the end of a month, quarter, or other interval. Traction beginners often find this more intuitive.

Note: This preference used to be set on a per project basis. As of version 3.7, this is a user preference.

Time Zone

Doc291: March 22, 2008 4:21 PM, Posted by Documentation Importer

Traction records time in GMT. Traction's default time zone will be based on time zone set for the computer Traction runs on. If the computer is located in a different time zone from most users, you can set the default time zone to the time zone where the users are. Users who use your server from different time zones can specify their own time zone, and dates and times will be displayed relative to their time zone.





Calendar Quarter Format

Doc21: March 22, 2008 3:46 PM, Posted by Documentation Importer

Calendar Quarter Format

```
Default (Annual - Q1 is January through March)

Default (Annual - Q1 is January through March)

Hi Annual - Q1 is January through March
Fiscal - Q1 is October through December
None - Show bullets instead of numbers
```

The default calendar follows the Annual year:

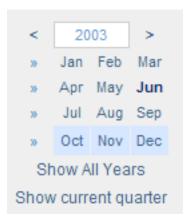


You can alternately choose to display the default fiscal year. Note that the quarters are *numbered* differently.



You can also show bullets instead of numbers.



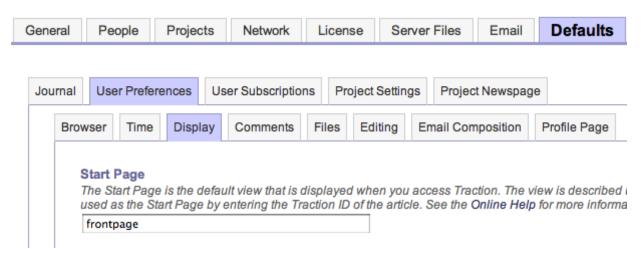


Start Page

Doc282: March 22, 2008 4:21 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

As of Traction 3.7, it is possible to specify what page users will see by default when they visit a Traction server. This default page is specified in terms of a Introduction to the Rapid Selector Guide.

Traction Software server setup



The default behavior is still for users to be directed to the server's front page.

Default Chunk Size

Doc58: March 22, 2008 3:53 PM, Posted by Documentation Importer

When any Traction view involves multiple entries, there may be so many results that it is impractical or



inconvenient to display them all in a single page. Therefore, Traction supports a behavior called "chunking", in which results are reported in chunks or blocks of 25, 50, or some other more convenient size. This preference allows users to specify how many results they want to see on a single page.

Default Chunk Size Default (25)

When a reverse chronological, topic, or other multi-entry view contains more than a certain number of entries, Traction can partition the list of entries into "chunks". Traction's interface allows the user to change the size of the chunk whenever a chunked view is loaded in the browser, but this option allows the user to choose what size chunk should be used by default.

This is the default chunk size only; the chunk size can be changed for any particular view using the standard chunk navigation controls that typically appear, along with a sorting control, at the bottom of the page. Users can even ask for *all* results to be displayed in a single page.



Snippet Length

Doc280: March 22, 2008 4:20 PM, Posted by Documentation Importer

The term "snippet" refers to a summary based on the first several words or characters appearing in a Traction article. Snippets are used in search result views to highlight search hits in the resulting articles.



Searching All Projects

February 3, 2006

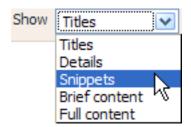
Sample Engineering Task List

Engineering 22 | February 3, 2006 | 6:54:13 PM EST | Posted by admin

... This is an example *task* list for the Engineering team. Each ...

Snippets volume can be used even when the page does not represent search results, by selecting "Snippets" in the volume control that appears near the top of the page in most skins.





This preference allows users to choose their preferred relative length for snippets.

Snippet Length Default (Medium)

Snippets are brief portions of content displayed in the Snippets volume.

Show Item ID s

Doc271: March 22, 2008 4:20 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Show Item ID's Default (yes)

Item ID's are the permanent identifier of the item, which the item's labels are attached to. Even if you move an item around in an article or add another item in front of it, its ID will always be the same. In most skins, they appear at the end of the paragraph and begin with a 0, like 03.

In the example below, item numbers are shown in yellow and ID's in green. Item numbers are a straight count, whereas ID's can be rearranged during edits. Comments and labels are attached to ID's. IDs are also displayed in the bottom right corner of the hover.

Comment60 (#) | TrackBack | May 12, 2005 | 5:50:52 PM EDT Posted and Edited by Chris Nuzum | View edit history 2 Comments

- (1) This is a new article. 01 🛭
- (2) This is the second paragraph. 👥 🛭
- (3) This paragraph was added between the second and third. It's number is three, but it's ID is 04.04 🛭
- (4) And this is the third. 03 8

Show Item Numbers



Doc272: March 22, 2008 4:20 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Show Item Numbers | Default (no) | >

Item Numbers number each item relative to the start of the article. They make it easy to refer to a particular item in an article. In most skins, they appear in parentheses to the left of each item, like (3).

In the example below, item numbers are shown in yellow and ID's in green. Item numbers are a straight count, whereas ID's can be rearranged during edits. Comments and labels are attached to ID's. IDs are also displayed in the bottom right corner of the hover.

This article illustrates comment depth a

Comment60 (#) | TrackBack | May 12, 2005 | 5:50:52 PM EDT Posted and Edited by Chris Nuzum | View edit history

- (1) This is a new article. or 🛭
- (2) This is the second paragraph. 🚾 🛭
- (3) This paragraph was added between the second and third. It's number is three, but it's ID is 04. 04 8
- (4) And this is the third. 03 8

Label Icons

Doc153: March 22, 2008 4:06 PM, Posted by Documentation Importer

Label Icons

Default (Icons in the left margin, labels in the right margin)

Default (Icons in the left margin, labels in the right margin) No Icons

Icons in the left margin, labels in the right margin

Icons and labels in the right margin Icons ONLY in the right margin

ws where the label appears. If you would ence affects the Modern skin and is

Note: This option was formerly used by the Modern skin only. As of version 3.7, there are no skins that still support this preference.

This is the default display (Icons in the left margin, labels in the right margin:



Zoom In -- Nice to Have: Based on a key combination, allow for Zoom in so that the user can fine tune the capture and be sure to include or exclude borders or other fine features of an image they are capturing. 02 %

Feature: Idea

7 comments



This is both on the right:

Zoom In -- Nice to Have: Based on a key combination, allow for Zoom in so that the user can fine tune the capture and be sure to include or exclude borders or other fine features of an image they are capturing. $02 \, \text{m}$



7 comments

This is icons only. Note: if a label doesn't have an icon, the text of the label will be displayed.

Zoom In -- Nice to Have: Based on a key combination, allow for Zoom in so that the user can fine tune the capture and be sure to include or exclude borders or other fine features of an image they are capturing. $02 \, ^{\circ}$



7 comments

This is no icons:

Zoom In -- Nice to Have: Based on a key combination, allow for Zoom in so that the user can fine tune the capture and be sure to include or exclude borders or other fine features of an image they are capturing. 02 0

7 comments

Transclude Titles By Default

Doc302: March 22, 2008 4:23 PM, Posted by Documentation Importer

Transclude Titles By Default Default (yes)

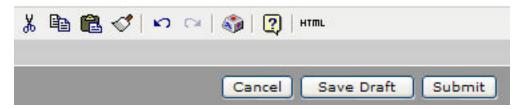
If yes, the title of cross-referenced articles will be displayed in the referencing article; e.g. a cross reference to "Acme23" will display as "Acme23: This is a great feature".

When you type a cross-reference (or "citation") in an article, e.g.



This is a cross-reference to comment38.





it is normally displayed as a hyperlink that shows the current title of the article linked to:

And this is the third. 03 8

This is a cross-reference to Comment38: Usage of this system. 05 🖾

If you don't have permission to see the article linked to, it displays as ordinary text.

If you want to preserve the hyperlink, but don't want to show the title by default, you can set this option to *No.* The resulting view will then look like:

And this is the third, 03 M

This is a cross-reference to Comment 38. 05 M

Hide System Articles

Doc130: March 22, 2008 4:04 PM, Posted by Documentation Importer

Hide System Articles Default (yes) ▼

Articles are automatically created to indicate edits, reclassifiations, erasures, and unlogged email messages. If yes, these articles will be hidden from most views. They will still be accessible from the list of cross references.

Normally records of reclassifications, updates, etc. are not displayed in full chronology views. This



preference allows users to indicate whether these records should be included in full chronology views.

Note: these records display only in *full* views, not in *brief* views.

Here is a sample label change and edit (update) record.

August 30, 2006

φ.

Updates Engineering 22, Sample Engineering Task List

Engineering69 | August 30, 2006 | 7:38:24 PM EDT Posted and Edited by admin | View edit history

Changed wording of 3rd task.

Show Actual Contents of this Version

Engineering 22, Sample Engineering Task List

- 2

reclassification

Changes Labels on Engineering 22, Sample Engineering Task List

Engineering70 | August 30, 2006 | 7:38:39 PM EDT Posted by admin

Note that label change records are labeled "reclassification" and can be shown in a topic view at any time, even without enabling this option:



August 30, 2006

Engineering 22, Sample Engineering Task List

众

Changes Labels on Engineering 22, Sample Engineering Task List

reclassification

Engineering 70 | August 30, 2006 | 7:38:39 PM EDT Posted by admin

July 12, 2006

reclassification

Engineering 47, Frequently Asked Questions

- 0

Changes Labels on Engineering47, Frequently Asked Questions

Engineering65 | July 12, 2006 | 11:25:49 AM EDT Posted by admin

Article Level Added: ::Engineering:bulletin

Amount of Ancestral Context to Include with Comments in News Feeds

Doc10: March 22, 2008 3:45 PM, Posted by Documentation Importer

Amount of Ancestral Context to Include with Comments in News Feeds

Default (Parent Item Only)

This setting governs the amount of ancestral context to include with a comment when it appears in syndicated news feeds (e.g. RSS or Atom). The parent refers to the paragraph or item commented on. The parent may itself be a comment on another paragraph. Ancestry refers to all parents and their parents. Full thread refers to the entire hierarchy of relations to which the given article belongs.

This preference allows users to control how much context is present in the RSS and Atom feeds they get from Traction. See Amount of Ancestral Context to Include with Comments in Email Notifications for a more detailed explanation.

Comment Depth

Doc37: March 22, 2008 3:48 PM, Posted by Documentation Importer



Comment depth 3

This is the depth to which comments on comments will be displayed in the single article view. If set to 0, no depth limit will be enforced.

✓ Use the default value (3)

This setting lets you control how many levels of nesting will be displayed. When the specified limit is reached, the lowest-level comment will report the number of comments directly on it.

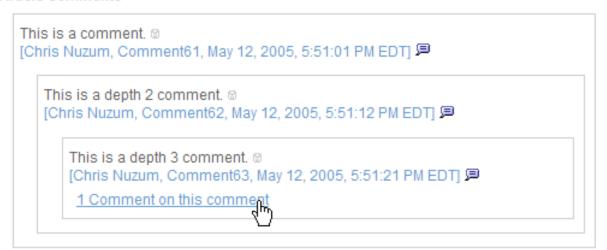
This article illustrates comment depth a

Comment60 (#) | TrackBack | May 12, 2005 | 5:50:52 PM EDT Posted by Chris Nuzum

◆ Cross References | ₱ 1 Comment

This is a new article. 01 8

Article Comments



To see the remaining comments, you can click that link.



re: This article illustrates comment depth a

Comment63 (#) | TrackBack | May 12, 2005 | 5:51:21 PM EDT Posted by Chris Nuzum

- Cross References | 1 Comment

re: This article illustrates comment depth @

This is a depth 2 comment.

[Chris Nuzum, Comment62.00, May 12, 2005, 5:51:12 PM EDT]

This is a depth 3 comment. or 8

Article Comments

This is a depth 4 comment.

[Chris Nuzum, Comment64, May 12, 2005, 5:51:30 PM EDT]

This is a depth 5 comment.

[Chris Nuzum, Comment65, May 12, 2005, 5:51:39 PM EDT]

If you prefer to have all comments always shown, you can set the depth to 0.

Comment depth 0

This is the depth to which comments on comments will be displayed in the single article view. If set to 0, no depth limit will be enforced.

Use the default value (3)

This will let all comments be displayed.



This article illustrates comment depth a

Comment60 (#) | TrackBack | May 12, 2005 | 5:50:52 PM EDT Posted by Chris Nuzum

- Cross References | P 1 Comment

This is a new article, of 80

Article Comments



Note: This preference is advisory for skins; certain skins may ignore this setting.

Comment Sort Order

Doc38: March 22, 2008 3:48 PM, Posted by Documentation Importer

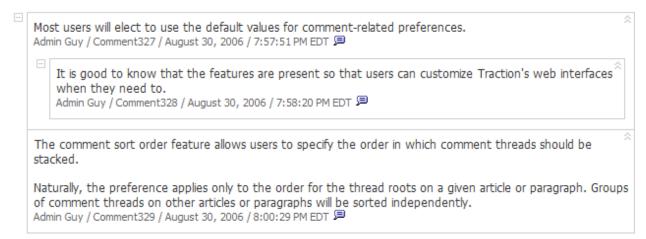
Comment Sort Order Default (Oldest First)

When multiple comments appear on an item, this setting specifies the order in which they should appear.

Traction usually displays comments in a threaded fashion so it's easy to determine what the comment's author is referring to. Ordinarily, the threads that refer to the same article or paragraph are stacked in chronological order, with the oldest thread at the top and the newest thread at the bottom.



Article Comments



This preference allows users to reverse this behavior, so that the newest comment threads appear at the top and the oldest appear at the bottom.

Article Comments

The comment sort order feature allows users to specify the order in which comment threads should be stacked.

Naturally, the preference applies only to the order for the thread roots on a given article or paragraph. Groups of comment threads on other articles or paragraphs will be sorted independently.

Admin Guy / Comment329 / August 30, 2006 / 8:00:29 PM EDT

Most users will elect to use the default values for comment-related preferences.

Admin Guy / Comment327 / August 30, 2006 / 7:57:51 PM EDT

It is good to know that the features are present so that users can customize Traction's web interfaces when they need to.

Admin Guy / Comment328 / August 30, 2006 / 7:58:20 PM EDT

Show Trackbacks With Comments

Doc277: March 22, 2008 4:20 PM, Posted by Documentation Importer



If yes, Trackbacks to articles will appear with comments.

This option lets you determine whether TrackBacks are displayed the same as inline comments. See Trackback InboundSetup for more information.



Sample Article Published to Public as News

news

(2)

Public0 (#) | trackback | 7/16/02 10:28 am posted by admin | edited by admin | view edit history Φ cross references | \blacksquare 2 comments

This is a sample article published to the Public project as News. It is immediately visible and searchable to all visitors. 01 🚳

You can always edit it, reclassify it to remove the News label, or erase it. 02 ®

Article Comments:



Reference Types to Be Displayed as Comments

Doc1088: July 12, 2009 3:36 PM, Posted by Christopher Nuzum

By default, Traction displays comments, outgoing email, incoming email, and trackbacks as inline comments. Using this control, you can customize the reference types that are displayed inline.

Show Location for Attachments in File Details

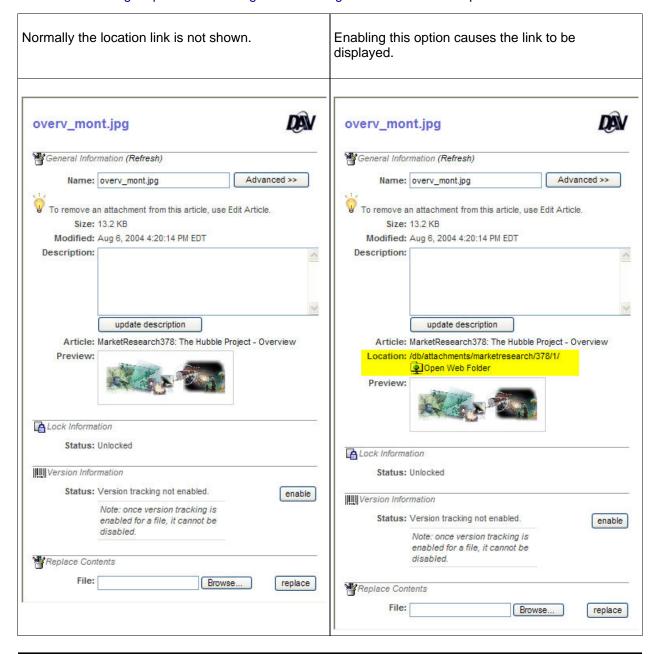
Doc273: March 22, 2008 4:20 PM, Posted by Documentation Importer

Show Location for Attachments in File Details | Default (no) | V

If yes, the folder location for attachments will be displayed in the file details view.



See also TeamPage Options and Configuration Settings in the WebDAV chapter.

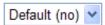


Show Edit Button for Microsoft Office Documents

Doc268: March 22, 2008 4:20 PM, Posted by Documentation Importer



Show Edit Button for Microsoft Office Documents | Default (no) | V



Allows you to launch Microsoft Office applications and save the edited document directly to the Traction server, rather than creating a temporary copy on your desktop. This is only available in Internet Explorer. To configure your Internet Explorer security settings to allow this feature, please see the help guide

This option is explained in the TeamPage Options and Configuration Settings portion of the WebDAV instructions.

Show Lock Option for Files

Doc274: March 22, 2008 4:20 PM, Posted by Documentation Importer

Show Lock Option for Files | Default (no) | V



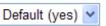
If yes, for WebDAV enabled files the option to Lock a file will appear in the file details view.

This option is described in the TeamPage Options and Configuration Settings section of the WebDAV chapter.

Show Open Folder Icons for Attachments

Doc275: March 22, 2008 4:20 PM, Posted by Documentation Importer

Show Open Folder Icons for Attachments | Default (yes) | V



This is only available in Internet Explorer. If yes, the attachments list will show a yellow open folder icon 🖳 that will open the web folder. From there, attachments can be edited using WebDAV enabled applications as if they were files on your computer.

This option is explained in the TeamPage Options and Configuration Settings portion of the WebDAV instructions.

Show Add Link for Sections

Doc266: March 22, 2008 4:19 PM, Posted by Documentation Importer

The term "sections" refers to newspaper-like sections, that are simply queries that aggregate articles according to some set of criteria. Many sections are driven by labels, or are simply lists of recent articles. In many cases, Traction can offer users the option to add an article to a section, and will initialize the Create New Article's "Labels" field with any labels that are necessary for the new article to appear in the section. This preference allows users to indicate whether they want the "Add" button to appear when it is possible for them to add an article to a section.

Show Add Link for Sections | Default (yes) | V



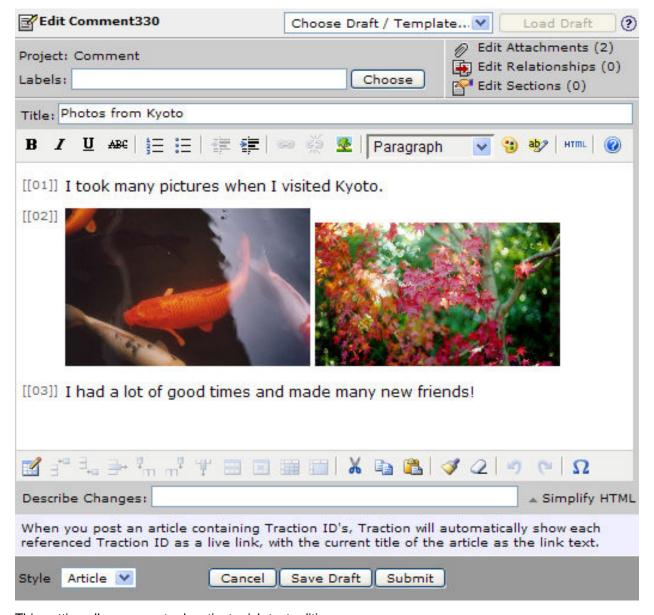
Each section has an option to show a link to add articles to the section. If this is set to no, these links will not appear regardless of the section setting.



Use Rich Text Edit Mode When Supported

Doc310: March 22, 2008 4:24 PM, Posted by Documentation Importer

An increasing number of browsers support HTML rich text editing, also called WYSIWYG editing ("What You See Is What You Get"). Normally rich text editing is enabled by default for new articles, comments, email replies, and the cover letters that go with emailed articles.



This setting allows users to deactivate rich text editing.



Use Rich Text Edit Mode When Supported Default (yes)

Starting with version 3.6, Traction supports a rich text edit mode for creating and editing articles and comments. This option allows users to choose whether or not to use rich text mode when it is supported by their browser.

When rich text edit mode has been deactivated, all the rich text controls for formatting text, inserting images and links, etc., are not displayed. Instead, the user has access to the raw article content.



Note: When plain text edit mode is in use, the Set Plain Text when Posting user preference comes into play.



Set Plain Text when Posting

Doc260: March 22, 2008 4:19 PM, Posted by Documentation Importer

In plain text edit mode, users have the option of checking the "Plain Text" checkbox. When activated, this option makes it so that users do not have to manually add HTML
 tags when they want line breaks; instead, they only have to press enter to insert a normal line break, and Traction will replace it with a
 when the article is displayed.





Line Break Demonstration

Comment331 | August 30, 2006 | 8:34:25 PM EDT Posted by Jordan Frank

I don't need to type an HTML BR tag to get a line break.

Traction inserts one automatically at display time when I check the "Plain Text" checkbox.

This preference allows users to set the default state of the "Plain Text" checkbox.

Set Plain Text when Posting Default (no)



If yes, the New Article and Comment windows will default to having Plain Text checked. This setting can still be changed before submitting the article.

Automatically Saved Drafts

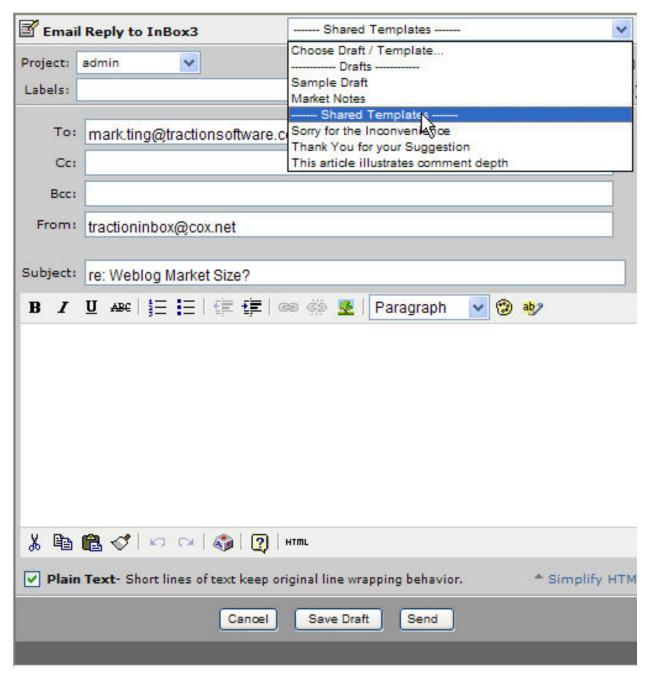
Doc699: January 13, 2009 4:55 PM, Posted by Paul Needham

Sort email reply templates alphabetically

Doc281: March 22, 2008 4:21 PM, Posted by Documentation Importer

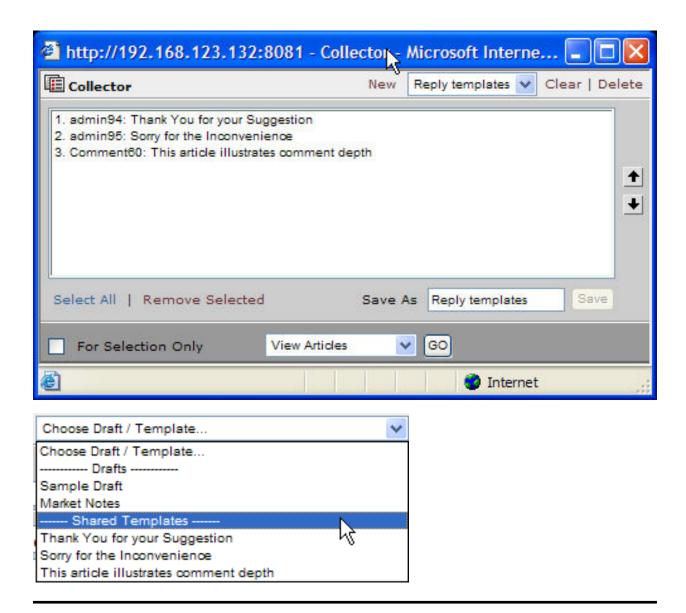
By default, the email reply templates are sorted alphabetically:





Turning them off sorts them in the order of the source collection:





Bcc Me when I Send Email

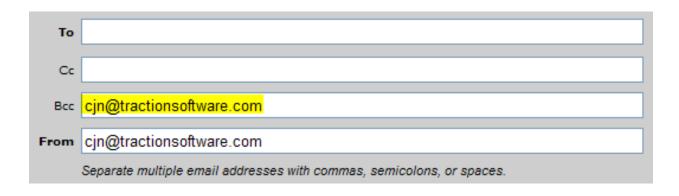
Doc20: March 22, 2008 3:46 PM, Posted by Documentation Importer

Bcc Me when I Send Email Default (no) V

If yes, when you email articles from Traction using either the Email Articles or the Email Reply forms, the BCC field will be prefilled with your preferred email address.

If set to Yes, the Bcc field of the *Email Articles* form will be initialized with the sender's default email address.



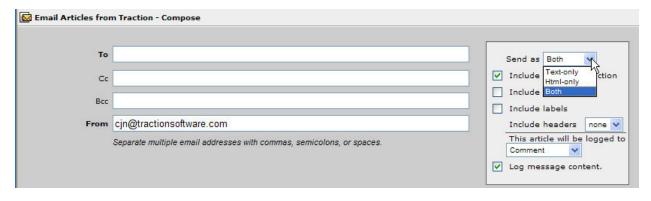


Email Articles As

Doc78: March 22, 2008 3:55 PM, Posted by Documentation Importer



This controls the default for how messages are sent on the Email Articles form.



Log Emailed Content

Doc160: March 22, 2008 4:07 PM, Posted by Documentation Importer



When emailing articles from Traction, users can choose whether any message content sent with the emailed articles will be included in the body of the article logged. The Email Articles form will default to the setting chosen here, but it can still be changed before the articles are sent.

This controls the default value of the *Log email content* checkbox on the email articles form.





Profile Page Preferences

Doc637: January 9, 2009 12:44 AM, Posted by Paul Needham, Edited by Jordan Frank

Profile Page preferences are set in the Personal Information tab.

In the Profile Page area you can:

- 1) Customize your Profile Sections
- 2) Choose your Profile Picture

Profile Sections

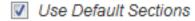
Doc575: December 30, 2008 8:45 PM, Posted and Edited by Paul Needham

Users' Profile Pages can include sections, both for reference by the user or by other users. See Personal Information for more information on setting up Profile Pages. See Sections Overview for more detailed information on the section settings.

The default sections for a Profile Page show articles and comments authored by the user of the profile being viewed. However, a system administrator or the user can customize the sections shown in a Profile Page as desired. Simply uncheck the *Use Default Sections* checkbox and change the sections as required.

Profile Sections

These sections will appear on your profile page.



In order to make a section on a Profile Page show only articles and/or comments authored by that user,



check the Only include posts by this user checkbox as shown below:



Otherwise, setting up sections on a Profile Page is no different than setting them up for use elsewhere.

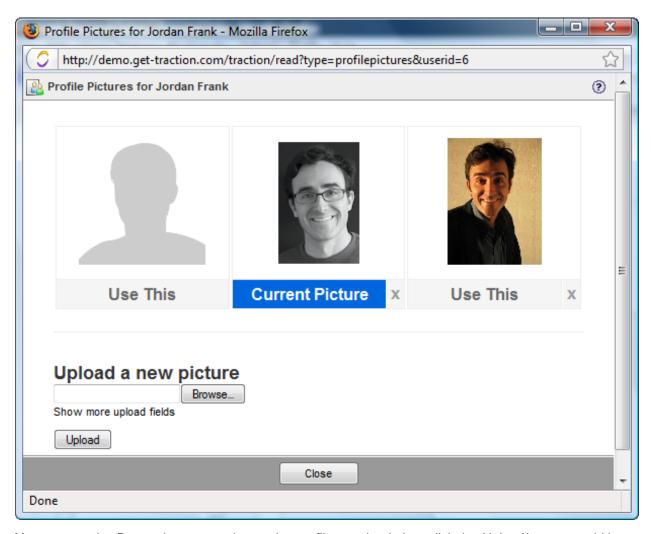
Note: Adding and configuring sections on a Profile Page does not require using the two step process described in Article Sections.

Profile Picture

Doc638: January 9, 2009 12:46 AM, Posted and Edited by Paul Needham

To add or change your *Profile Picture*, click the *Edit* button in the Profile Page area of Personal Information or the *Edit Picture* link that appears below your picture when viewing your Profile Page. The following form will pop up in a new window.





You can use the *Browse* button to select an image file to upload, then click the *Upload* button to add it to your gallery of available choices. The image should be in GIF, JPEG or PNG format and should be no larger than ???

You can see which image is currently being used as your Profile Picture by looking for "Current Picture" displayed below the preview. To change to a different image, click *Use This*.

To delete an image from your gallery, click the X below the image.

Email Digest

Doc899: February 22, 2009 3:51 PM, Posted by Paul Needham, Edited by Jordan Frank

The Email Digest is the most commonly-used type of notification

Traction supports Email Notifications, Jabber Notifications and RSS and Atom feeds, but the most popular notification type is the Email Digest. Traction can generate an email summary digest automatically, for each user. The digest includes content from each project depending on each user's individual



permissions and preferences.

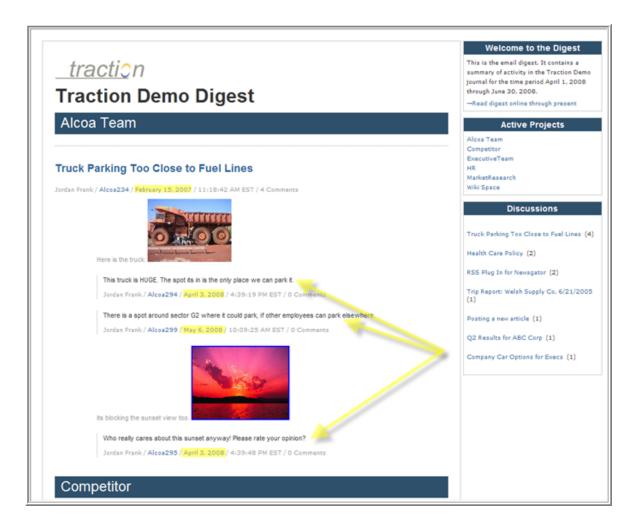
The digest summarizes new content since the last time it was sent to any given user. The content in the digest is based on the projects that can be seen by the user, the projects selected to be in the digest (My Digest Projects), and the sections which determine what content to include, and how.

Block Digest Format - Grouped by Activity

The default format is the **Block** digest skin with content **grouped by Activity**. The **Block 2** skin format is nearly identical, but shifts the contents of the right column to the bottom of the digest. **Block 2** is a better choice when users may have small format devices like iPhones. This format looks to the Digest Sections to determine what content to include - but then organizes the content entirely by project.

Because it organizes comments by Thread, the grouping by Activity format is especially good for scenarios where there is a reasonable to high amount of discussion. Note that comments in Project B threaded against an article in Project A will show up threaded against the article title in Project A.

You can see in the screenshot of the Activity styled digest below that a series of comments in the current digest period (April 1, 2008 to June 30, 200) are threaded against an article published in February 2007.





Block Digest Format - NOT Grouped by Activity

If the default is changed to group by section instead of by Activity, the digest lists out any sections that are specified and iterates over projects. It includes title and first paragraph of all new articles and comments. It generally organizes the information by project and raises important information (e.g. headlines) to the top:



Welcome to the Digest This is the email digest. It contains a summary of activity in the Traction Starter Journal Journal for the time period September 27, 2005 through August 23, 2006. traction **Traction Starter Journal Digest** Active Projects Headlines & News Engineering (16 articles) HR (6 articles) Intelligence (5 articles) Welcome to the Starter Journal - Read this First Active Discussions nin / Engineering0 / September 27, 2005 / 2:32:18 PM EDT / 0 Co Does the 401K policy allow for roll-overs (1) Thanks for trying Treaction. This journal may provide a good place to start, since it includes projects (group blogs) for teams byocally found in any organization. You can modify this journality adding new Traction blogs for groups in your organization (you can also turn off the starter projects), or create a new journal from scratch whenever you liss. Sample content has been based store and project and some setting options have been used to configure each project to give you a jump start and a few examples. Please click the *Site of this* article to read more. Engineering Articles What is a Bulletin? admin / Engineering53 / June 6, 2006 / 4:06:14 PM EDT / 0 Comments [bulletin, FAQ] The Bulletin label and corresponding section is used like a bulletin board to show key group information, rergardless of how new or old it may be. If you navigate forwards or backwards in time, the contents of other sections may change to reflect the selected time period, but the Bulletins section will stay the same. **Frequently Asked Questions** admin / Engineering47 / June 6, 2006 / 3:57:38 PM EDT / 0 Comments (bulletin FAQ) This article includes a section which contains an alphabetically sorted list of article titles marked with the Engineering project FAQ liabel. The section is also configured to include a button users can click to add an FAQ. You may also add an FAQ to any other article in the system. Executive Articles Sample Executive Idea, cross labeled to Engineering admin / ExecutiveO / June 6, 2006 / 4:12:58 PM EDT / 0 Com [:Engineering:PVI] This is a sample article in the Executive project. Perhaps I had an idea following reading Engineering 4. Sample Engineering and Executive Status Report, and decided to share it with the Executive project members. At the time or thereafter, I wanted to share it with the Engineering group. HR Articles re: Does the 401K policy allow for roll-overs admin / MR7 / June 5, 2006 / 11:38:04 AM EDT / 0 Comm The powerpoint attached to HRT: 461K Policy explains your options for changing your 401K after you leave the company. The short answer, however, is YES. Can I use sick days for paternity leave? I will go on paternity soon and wonder if I can be paid for the time I will be out of the office. Is it possible to use my sick days during this period of time? Intelligence Articles Intelligence Ethics Bulletin sómin / Intelligence4 / July 14, 2006 / 10:42:22 AM EDY / 0 Comm [bulletin] An inteligence project may include a Bulletin entry about the Ethics guidelines which will show in the Bulletins section regardless of the time side selected. Sample Intelligence Analysis on Apollo Objective admin / Intelligence3 / July 14, 2006 / IO:34:25 AM EDT / 0 Comm [analysis. Apollo] This sample analysis has the Analysis label to cafegorize it as an analysis report and the Apollo label to associated it with the Apollo objective defined at Intelligence0: Sample "Apollo" intelligence Objective (or KIT).

Front Page | Edit subscription

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Configuring the Digest

The administrator can configure the look and feel of the digest (including the Group By option) with the Digest - Customize Settings controls. The admin can manage the content and organization of the digest with Digest Sections and by selecting which projects are included in the digest. The administrator can also indicate what days and times it should be sent.

Users can over-ride administrator settings to change the project list for their digest, adjust the sections and change how often it is sent.

The digest keeps everyone informed, provides an easy way to get up to date without leaving the email client, and generates "demand pull" to your Traction server.

Server Digests Enabled

Doc245: March 22, 2008 4:16 PM, Posted by Documentation Importer



If checked, digests which are controlled by the server administrator will be sent to you. Server Digests (if any) are shown below as grey rows.

If this checkbox is selected, you will automatically receive all server digests that include articles that you are allowed to read. You can also configure your own Personal Digest Information.

Note: This checkbox controls the same setting as the Server Setup Recipients of Server Digests control, except that it only affects the currently selected account.

Server Digest Mail Format

Doc243: March 22, 2008 4:16 PM, Posted by Documentation Importer

This preference allows users to choose the format in which server digests will be sent to them.

Server Digest Mail Format

HTML only

O Text only

Both Text and HTML

If you prefer not to receive HTML mail, you can select *Text only*.

Note: the text-only version of the digest may not be merely a plain text version of the HTML digest. Most digest skins use the same simple hard-coded text only digest, which does not use the digest sections.

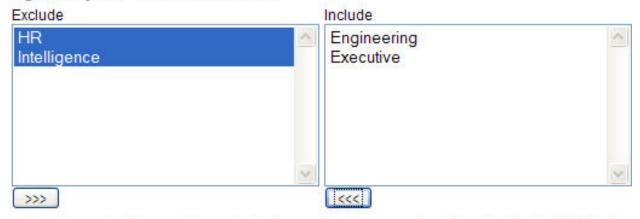
Digest Projects



Doc67: March 22, 2008 3:54 PM, Posted by Documentation Importer

This preference allows users to choose which projects' content will appear in digests they receive.

Digest Projects Use Default Value



To skip content from certain projects in your digests, move them from the "Include" list to the "Exclude" list.

By default, all projects are in the "Include" list. Server administrators may elect to change the default "Include" list.

Note: Besides changing this default listing, however, server administrators may also choose to restrict which projects are *eligible* to have their content appear in digests. Projects that are disallowed at the server level will never be represented in any digest. See the Projects to Include in Digest topic for more information on that feature.

Digest - Customize Settings

Doc66: March 22, 2008 3:54 PM, Posted by Documentation Importer, Edited by Jordan Frank

The Email Digest is the most popular form of notification. The Default Digest format is the Block digest. Using Traction's Skin Definition Language (SDL), multiple alternative digests can be created.

Customize the Digest Skin Settings

The Email Digest page shows examples of the Block digest. The **Digest** setting controls which digest format will be used and the Customize button controls the look and feel of the digest skin itself. This setting is found in the following tabs for Admins and Users respectively:

- Server Setup | Preferences | Defaults | User Subscriptions | Digest
- Personal Setup | User Subscriptions | Digest



Different digests vary in both appearance and content.

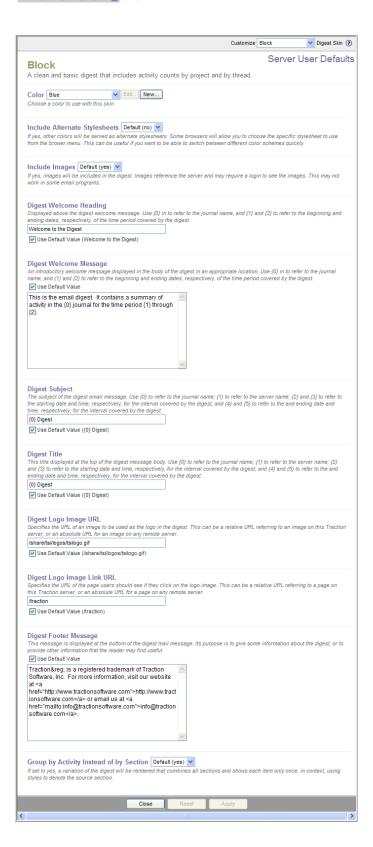
Clicking the *Customize* button displays the options available for the selected digest skin. The default *Block* digest has several options, including a choice of what color scheme to use, the text that should



appear in the subject and welcome message, and whether the content should group by Activity/Thread vs. by Project.

Note: the {0} variable refers to the Description field for the Current Journal (In the Server Setup | General | Current Journal tab).







Group by Activity Instead of By Section Setting

A setting that has a major influence on the organization of digests using the default *Block* skin appears at the bottom of the *Customize Block Digest Skin* window:

Group by Activity Instead of by Section Default (yes) -

If set to yes, a variation of the digest will be rendered that combines all sections and shows each item only once, in context, using styles to denote the source section.

Examples of each format appear in Email Digest

When set to yes, which is the default, the *Block* digest skin will not group articles and comments by section, but by project with styling elements to denote sections they belong to. Comments will be shown hierarchically under the articles/comments they are on. This digest organization works especially well when nested comments are frequently used, particularily if comments are posted in projects different than the projects that contain the articles being commented on.

Digest Sections

Doc69: March 22, 2008 3:54 PM, Posted by Documentation Importer, Edited by Jordan Frank

Configuring this section lets you control the contents of the Traction email Digest. See Sections Overview for more information on the specific section settings controls.

Note: By default, Traction TeamPage may be set to use the *Block* digest skin with a default setting that causes the digest to *Group by Activity* instead of *By Section*. This settings uses the sections to determine what content should appear but then displays that content by project. This has the advantage of being able to cluster discussion threads together - rather than breaking each comment into its own entry in the digest. The Digest Section setup screen is described in this article. For an overview of the digest, . This *Block* skin default works as follows:

Group by Activity Instead of By Section Setting

A setting that has a major influence on the organization of digests using the default *Block* skin appears at the bottom of the *Customize Block Digest Skin* window:

Group by Activity Instead of by Section Default (yes) ▼

If set to yes, a variation of the digest will be rendered that combines all sections and shows each item only once, in context, using styles to denote the source section.

When set to yes, which is the default, the *Block* digest skin will not group articles and comments by section, but by project with styling elements to denote sections they belong to. Comments will be shown hierarchically under the articles/comments they are on. This digest organization works especially well when nested comments are fequently used.

You need to change this setting to "no" for the default or customized Digest Sections to be used in the *Block* digest skin.

Digest Sections



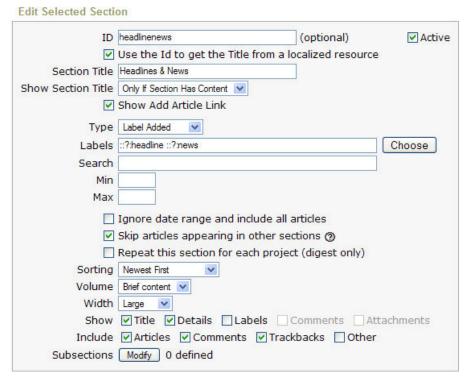
Digest Sections

You can customize Traction so that the sections you choose appear in your Digest.



If you want to customize the sections, uncheck the *Use Default Sections* checkbox. The digest section editing interface will appear.





For general instructions on using this interface to configure sections, see Sections Overview

In the context of digest sections, the label qualifier "::?" filters based on the list of projects selected in "My Digest Projects" rather than all projects which may be visible to a given user.

Email Notifications

Doc588: December 31, 2008 10:18 AM, Posted by Paul Needham, Edited by Jordan Frank

Many users are happy with the daily summary provided by the Email Digest, a permission filtered newsletter format that concisely shows all new content, and packs discussions into threads. However, other users may prefer more immediate notification via RSS/Atom Feeds, Email Notification or Jabber Instant Message Notifications.

Email Notification fits well with Email habits, provides nearly immediate notification and is highly



configurable so you can use it to monitor anything from all content, or a very specific search type query. Email Notification is a based on Traction's Listener and Notifier facilities. As mentioned, a Jabber Instant Message notifier with similar capabilities is also available as a plug-in.

Email notification is setup in the Server Setup | Defaults | User Subscriptions - Email Notifications tab. Each user can override the default settings in the My Account / Personal Setup | Subscriptions - Email Notifications tab.

Notification Examples

The following examples show notification of a new Article (a "Health Care Policy") followed by a notification that its been edited and a notification about a comment on it.

New Article Notification

The example below shows a newly published article titled "Health Care Policy" with the label Policy. You can easily follow the links back to comment on the entry.

Health Care Policy

Policy

HR94 | April 29, 2008 | 4:04 PM Posted by Jordan Frank 3 Comments

The standard policy covers employees for basic health care requirements.

Dental Coverage is not provided.

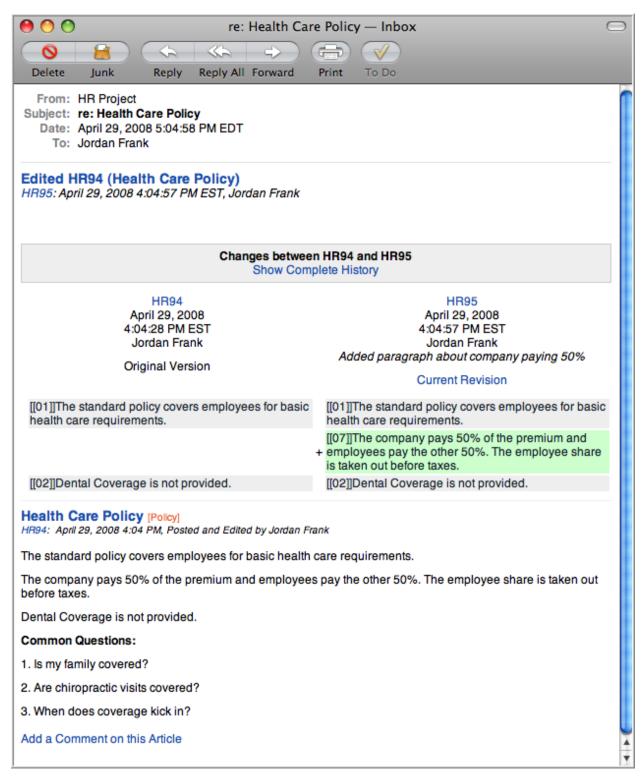
Common Questions:

- 1. Is my family covered?
- 2. Are chiropractic visits covered?
- 3. When does coverage kick in?

Edit Notification

This example shows the case where the article above has been edited. Specifically, a paragraph (highlighted in green) was added and nothing was removed. For context, the edit comparison shows the paragraphs above and below the new paragraph.





Comment Notification



As one component of Traction's exceptional support for threaded discussions, the comment example below shows the new comment and, for context, also includes quoted text to show you the text of the paragraph it comments on.



Fine Tuning The Email Notifier

Each Named User on a Traction TeamPage server can access their My Account link to manage their Email Digest and Email Notifier Subscriptions. You can filter by:

- * Your Events vs. Other Users' events: Just use this control to get notified of all activity.
- * Projects: Fine tune by restricting notifications to Projects you want to monitor.
- * Section: Use Section style configuration to tune notification to almost any query you can imagine.
- * Event Type: As an alternate to "by Section" Turn down the clamp by choosing which event types (e.g. New Article vs. Edit vs. Addition or Removal of a Label) are of interest.

Email Notification on Other Users Events

Doc80: March 22, 2008 3:56 PM, Posted by Documentation Importer

Email Notification on Other Users' Events Default (no)

Send an email notification to my preferred email address any time other users add or modify an article.

This preference lets users activate or deactivate email notification for events triggered by other users. For example, if an email notifier is configured to notify users when a new article is posted in the Intelligence project, changing this preference's value to "yes" for a particular user will allow them to receive an email notification when any other user posts a new article to the Intelligence project.



Here's a sample notification of a reclassification:

□ Subject: re: This article illustrates comment depth

From: no reply@tractionsoftware.com

Reply-To: no reply@tractionsoftware.com

Date: 6:22 PM

To: cjn@tractionsoftware.com

Comment 70: May 12, 2005 6:22:02 PM EDT, by Chris Nuzum

Comment60.03: And this is the third. +headline

Click here to view this article in Traction.

Here's one example of a newly posted comment might be displayed (see Amount of Ancestral Context to Include with Comments in Email Notifications):



Subject: re: This article illustrates comment depth

From: no reply@tractionsoftware.com Reply-To: no reply@tractionsoftware.com

Date: 6:24 PM

To: cjn@tractionsoftware.com

re: This article illustrates comment depth

Comment 71: May 12, 2005 6:24:22 PM EDT, by Chris Nuzum

re: This article illustrates comment depth

This is a depth 5 comment.

[Chris Nuzum, Comment 65, May 12, 2005, 5:51:39 PM EDT]

This is a depth 6 comment.

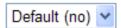
Add a Comment on this Article

Show all comments on Comment60: This article illustrates comment depth

Email Notification on Your Events

Doc81: March 22, 2008 3:56 PM, Posted by Documentation Importer

Email Notification on Your Events | Default (no) >



Send an email notification to my preferred email address any time I add or modify an article.

This preference lets users activate or deactivate email notification for events triggered by themselves. For example, if an email notifier is configured to notify users articles are edited in the Engineering project, changing this preference's value to "yes" for a particular user will allow them to receive an email notification of their own edits to articles in the Engineering project.

Here's a sample notification of a reclassification:



☐ Subject: re: This article illustrates comment depth

From: no reply@tractionsoftware.com

Reply-To: no reply@tractionsoftware.com

Date: 6:22 PM

To: cjn@tractionsoftware.com

Comment 70: May 12, 2005 6:22:02 PM EDT, by Chris Nuzum

Comment60.03: And this is the third. +headline

Click here to view this article in Traction.

Here's one example of a newly posted comment might be displayed (see Amount of Ancestral Context to Include with Comments in Email Notifications):



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re: This article illustrates comment depth

Comment 71: May 12, 2005 6:24:22 PM EDT, by Chris Nuzum

re: This article illustrates comment depth

This is a depth 5 comment.

[Chris Nuzum, Comment 65, May 12, 2005, 5:51:39 PM EDT]

This is a depth 6 comment.

Add a Comment on this Article

Show all comments on Comment60: This article illustrates comment depth

Subscribed Projects

Doc866: February 21, 2009 12:07 PM, Posted and Edited by Paul Needham

When setting up Email Notifications, you can use the Subscribed Projects area to choose which sections to receive notifications on. When the Use Default Value checkbox is checked, the projects determined by the server administrator will be used:

Subscribed Projects

Select which projects to subscribe to. You can also choose whether or not to automatically subscribe to new projects as they are created or otherwise become available to you.

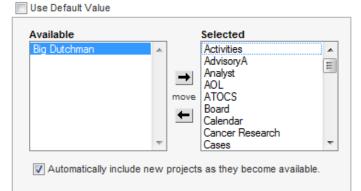
▼ Use Default Value

When you uncheck this checkbox, you can select which projects you don't want notifications on by placing them in Available and which projects you do want notifications on by placing them in Selected:



Subscribed Projects

Select which projects to subscribe to. You can also choose whether or not to automatically subscribe to new projects as they are created or otherwise become available to you.





If you want to be sure you are receiving notifications on new projects (that you are given read rights to) as they get created, make sure the *Automatically include new projects as they become available* checkbox is checked. If you want to selectively add projects yourself, uncheck this box.

This setting works in conjunction with the other Email Notification settings to determine when notifications will be sent. In particular, even if you leave all the available projects selected, you can confine notifications to specific projects based on how you configure sections used to filter notifications.

Filter Notifications Using Sections

Doc576: December 30, 2008 8:46 PM, Posted and Edited by Paul Needham

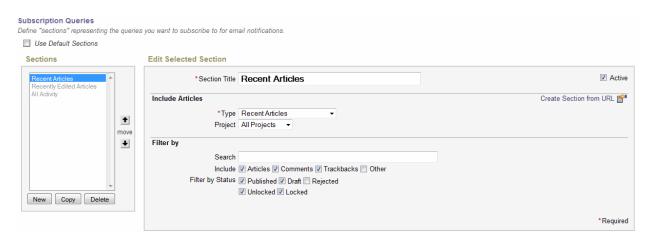
When setting up defaults for Email Notifications at the server level or when defining this for an individual account in My Account / Preferences, Traction provides the option to use sections to filter notifications. See Sections Overview for more detailed information on section settings. By default, section filtering is active.

Filter Notifications Using Sections Default (yes) ▼

Define sections to get more control over what notifications you'll receive.

When the Use Default Sections checkbox is unchecked, a simplified Edit Section form will be shown to allow you to customize the sections used to help filter when you receive email notifications. Three sections are provided by default with only the Recent Articles section in an active state. You can either modify these sections or create new ones.





The Recent Articles section above will cause an email notification to be sent anytime a new article is created. Using the Filter By settings, you can further define the types of articles that trigger a notification.

Note that this setting is dependent on Subscribed Projects to define which projects are included in *All Projects*. Likewise, if you are only interested in receiving notifications on activity in a single project, you can remove all other projects in Subscribed Projects, which simplifies setting up sections in Subscription Queries, as you can have the sections apply to *All Projects*, when creating sections to trigger notifications on specific actions.

Tip: An alternative way to set up criteria for triggering email notifications is to use Advanced | Filter Notifications by Event Type. You should determine if the desired notifications will be more easily defined using event types before setting up filtering by sections. Turning on filtering by event type will take precedence over any section filters you set up.

Filter Notifications by Event Type

Doc883: February 22, 2009 12:56 PM, Posted and Edited by Paul Needham

When setting up Email Notifications, you will typically want to narrow the types of actions that you receive email notices on in order to avoid cluttering up your email system with unnecessary notifications. You can do this by filtering using sections or by filtering by event type. Note that if you turn both methods on at once, you will receive this warning:

You have configured your notification subscriptions to be filtered by both event type and section queries. Please note that event type filtering takes precedence, so that you will not receive notifications on events other than your subscribed event types, even if you have a section query that would otherwise cause you to be notified.

You should select the filtering method that works best for narrowing down your email notifications in the manner desired and activate only that method.

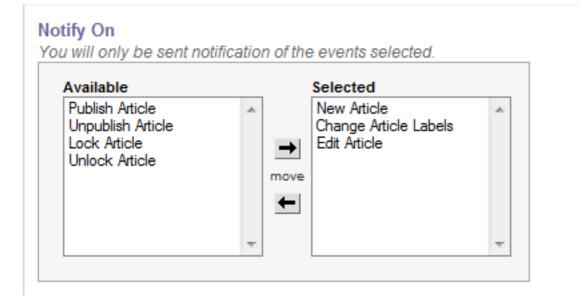
When using filtering by event type, you simply place the types that you want notifications on in *Selected* and place the types you don't want notifications on in *Available*.





Filter Notifications by Event Type yes ▼

List the types of events for which you would like to receive notifications.



As with filtering using sections, this setting interacts with other Email Notification settings. However, as opposed to filtering using sections, the event types chosen will always apply to all Subscribed Projects.

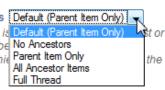
Amount of Ancestral Context to Include with Comments in Email Notifications

Doc9: March 22, 2008 3:45 PM, Posted by Documentation Importer, Edited by Jordan Frank

Amount of Ancestral Context to Include with Comments in Email Notifications | Default (Parent Item Only)

This setting governs the amount of ancestral context to include when an email notification is Default (Parent to update. The parent refers to the paragraph or item commented on. The parent may itself be paragraph. Ancestry refers to all parents and their parents. Full thread refers to the entire his given article belongs.

Default (Parent to update. The parent may itself be paragraph. Ancestry refers to the paragraph or item commented on. The parent may itself be paragraph. Ancestry refers to all parents and their parents. Full thread refers to the entire his paragraph. Ancestry refers to all parents and their parents. Full thread refers to the entire his paragraph.



When the email notifier sends a comment, you have the option to control how much context is provided around that comment. A range of options let you include no context at all, show the paragraph the comment is commenting on, or show the full thread with the new comment highlighted in yellow.

The default is the "Parent Item Only" option, which means that only the target paragraph, along with the target paragraph's article title and details:



Subject: re: This article illustrates comment depth

From: no reply@tractionsoftware.com Reply-To: no reply@tractionsoftware.com

Date: 6:24 PM

To: cjn@tractionsoftware.com

re: This article illustrates comment depth

Comment 71: May 12, 2005 6:24:22 PM EDT, by Chris Nuzum

re: This article illustrates comment depth
This is a depth 5 comment.
[Chris Nuzum, Comment 65, May 12, 2005, 5:51:39 PM EDT]

This is a depth 6 comment.

Add a Comment on this Article

Show all comments on Comment60: This article illustrates comment depth

The "No Ancestors" option omits thread context altogether:



☐ Subject: re: This article illustrates comment depth

From: no reply@tractionsoftware.com

Reply-To: no reply@tractionsoftware.com

Date: 6:30 PM

To: cjn@tractionsoftware.com

re: This article illustrates comment depth

Comment 72: May 12, 2005 6:30:12 PM EDT, by Chris Nuzum

This is a depth 7 comment.

Add a Comment on this Article

Show all comments on Comment60: This article illustrates comment depth

The "All Ancestors" option is like the "Parent Item Only" option, except that it causes the parent's parent to be displayed, as well as the parent's parent, and so on:



re: This article illustrates comment depth

Comment 74: May 12, 2005 6:31:03 PM EDT, by Chris Nuzum

This article illustrates comment depth

This is a new article. ...

[Chris Nuzum, Comment60, May 12, 2005, 5:50:52 PM EDT]

re: This article illustrates comment depth

This is a comment.

[Chris Nuzum, Comment61, May 12, 2005, 5:51:01 PM EDT]

re: This article illustrates comment depth

This is a depth 2 comment.

[Chris Nuzum, Comment62, May 12, 2005, 5:51:12 PM EDT]

re: This article illustrates comment depth

This is a depth 3 comment.

[Chris Nuzum, Comment 63, May 12, 2005, 5:51:21 PM EDT]

re: This article illustrates comment depth

This is a depth 4 comment.

[Chris Nuzum, Comment64, May 12, 2005, 5:51:30 PM EDT]

re: This article illustrates comment depth

This is a depth 5 comment.

[Chris Nuzum, Comment65, May 12, 2005, 5:51:39 PM EDT]

re: This article illustrates comment depth

This is a depth 6 comment.

[Chris Nuzum, Comment71, May 12, 2005, 6:24:22 PM EDT]

re: This article illustrates comment depth

This is a depth 7 comment.

[Chris Nuzum, Comment73, May 12, 2005, 6:30:34 PM EDT]

This is a depth 8 comment.

Add a Comment on this Article

Show all comments on Comment60: This article illustrates comment depth



The "Full Thread" option displays the entire thread. The newly added comment is highlighted with a yellow border:

re: This article illustrates comment depth

Comment 75: May 12, 2005 6:31:28 PM EDT, by Chris Nuzum

show comment added

This article illustrates comment depth

Comment60: May 12, 2005 5:50:52 PM EDT, by Chris Nuzum

This is a new article.

This is the second paragraph.

This paragraph was added between the second and third. It's number is three, but it's ID is 04.

And this is the third. [headline]

This is a cross-reference to Comment38: Usage of this system.

Article Comments

This comment was posted later than the first comment. [Chris Nuzum, Comment66, May 12, 2005, 5:55:58 PM EDT] This is a comment. [Chris Muzum, Comment61, May 12, 2005, 5:51:01 PM EDT] This is a depth 2 comment. [Chris Nuzum, Comment62, May 12, 2005, 5:51:12 PM EDT] This is a depth 3 comment. [Chris Nuzum, Comment63, May 12, 2005, 5:51:21 PM EDT] This is a depth 4 comment. [Chris Nuzum, Comment 64, May 12, 2005, 5:51:30 PM EDT] This is a depth 5 comment. [Chris Nuzum, Comment65, May 12, 2005, 5:51:39 PM EDT] This is a depth 7 comment. [Chris Nuzum, Comment72, May 12, 2005, 6:30:12 PM EDT] This is a depth 6 comment. [Chris Nuzum, Comment71, May 12, 2005, 6:24:22 PM EDT] This is a depth 7 comment. [Chris Nuzum, Comment73, May 12, 2005, 6:30:34 PM EDT] This is a depth 8 comment. [Chris Nuzum, Comment74, May 12, 2005, 6:31:03 PM EDT] This is a depth 9 comment! [Chris Nuzum, Comment75, May 12, 2005, 6:31:28 PM EDT]

When using the "full thread" option, users can click the "show comment added" link at the top right of the message body to jump right to the newly added comment.



Jabber Notifications

Doc891: February 22, 2009 3:03 PM, Posted by Paul Needham

Display

Doc71: March 22, 2008 3:55 PM, Posted by Documentation Importer

Project Setup - Display

This page allows project administrators to adjust various preferences associated with a project, such as which logo image to associate with the project, whether email replies to entries in the project should be use a particular from address or a particular subject line by default, and which article should be used as the sidebar article for views centered on the project.

Project Logo Image

Doc207: March 22, 2008 4:12 PM, Posted by Documentation Importer



This setting determines the logo image that appears on the Front Page and the default logo for Traction projects that don't specify their own logo image.

The Traction logo is the usual default:



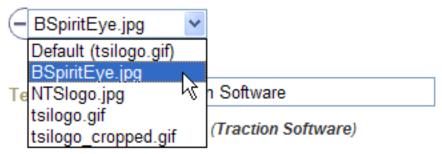
You can upload a new image from your computer by choosing its filename with the *Browse* button, then clicking the +).





The file you just uploaded will then appear in the list. You can press the (- to remove the listed filename from the server.

Project Logo Image

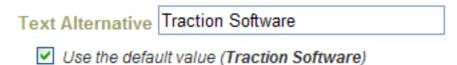


After applying changes on the page, the new logo is used.



Text Alternative

Doc286: March 22, 2008 4:21 PM, Posted by Documentation Importer



This controls the alt text attribute of the HTML IMG tag rendered for the project logo image.

Link To

Doc155: March 22, 2008 4:06 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

The project logo image is a link. This project preference controls the URL that the project logo image link targets.



Link To	/traction
Us	e the default value (/traction)

Normally clicking the logo image takes the user to their Start Page, but you can define the link to take you anywhere else by entering a different URL.



Front Page

Sidebar Article

Doc278: March 22, 2008 4:20 PM, Posted by Documentation Importer

The standard Traction skins all provide a spot for authored content to be included in the interface. This is often used for a welcome message, or useful navigation links.

Sidebar Shortcuts

This article (Engineering 13: Sidebar Shortcuts) is set as the default Sidebar Article. Click on the title "Sidebar Shortcuts" and edit this article to inloude useful shortcut links.

You can change the server Sidebar Article in Server Setup / Defaults and over-ride it in each project in Project Setup / Display.

Shortcut links to Resolved Issues and Questions:

- Resolved Issues
- Resolved Questions

The server default Sidebar Article is used for all views that apply to more than one project, e.g. the Front Page, or a reverse chronological view across all projects. If a project overrides the Sidebar Article, the project's selection will appear on all views that apply to a single project, e.g. the Project Newspage, or single entry views of entries in that project.



Any article can be designated as a sidebar article. First, write the content you would like to appear:

admin61 (#) | TrackBack | November 11, 2004 | 10:30:44 PM EST Posted and Edited by Chris Nuzum | View edit history

The sidebar entry goes here and it looks like this. of @

To designate this article as the Sidebar Article, enter its Article ID in the Sidebar Article slot and press apply.

Sidebar Article	admin61	
The TractionId of articles from this		r in the sidebar of views that displa
Use the defa	ult value (none specified)	

Project Editing Preferences

Doc503: December 24, 2008 6:31 PM, Posted by Paul Needham

Default Entry Style

Doc59: March 22, 2008 3:54 PM, Posted by Documentation Importer

This project preference allows administrators to specify whether entries are going to be *Article* style or *Page* style by default.

Default Entry Style Default (Article)

Determines the initial value of the Style option when submitting a new article.

The *Article* style represents the standard Traction entry style. The *Page* style represents more of a wiki style, in which each entry is a wiki page. In the standard Traction skins, the *Page* style also has a slightly different display style, that emphasizes presentation and editing over commenting (the inline comment form, for example, does not appear in single entry views of *Page* style entries).

This sets the default only; users can still elect a different style when submitting an entry.

Name Articles by Default

Doc481: December 17, 2008 12:34 AM, Posted by Paul Needham, Edited by Jordan Frank

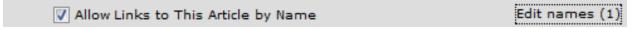


Name Articles by Default Default (no) ▼

Indicates whether, by default, articles in this project will support being linked to by name. If "Yes" has been selected for the "Require Articles in This Project to Have at Least One Name" setting, this setting will be ignored.

In projects where you want to encourage, but not require, wiki page naming, set this value to Yes. (another setting, Require Articles in This Project to Have at Least One Name will, instead, force page naming in a project).

This setting determines whether the *Allow Links to This Article by Name* checkbox in the Article Editor is checked by default. If set to "yes," the checkbox will be checked and when articles are posted, the article's title will be used as a wiki Page Name.



Note that when the checkbox is checked, the link to the right will change from *Add names* to *Edit names* and show how many names have been assigned to the article. Clicking the *Edit Names* link will allow the user to add additional names or edit existing names for this page.

This setting works in conjunction with the Require Articles in This Project to Have at Least One Name setting.

Require Articles in This Project to Have at Least One Name

Doc482: December 17, 2008 1:12 AM, Posted by Paul Needham, Edited by Jordan Frank

Require Articles in This Project to Have at Least One Name yes

Indicates whether or not articles posted in this project will be required to have at least one name.

Set this value to Yes in wiki style projects where it's essential that every article have a unique page name.

When set to "yes," this setting forces the *Allow Links to This Article* checkbox in the Article Editor to be checked and makes it unable to be toggled off (as indicated by being grayed out).



This means that articles in this project must all have at least one name (one of which must be the article title). If users click on *Edit names*, they will be able to add or remove names, etc. using the following form:





Note: Users can remove the existing article title as a name, but will not be allowed to save the change unless they have designated another available name as the title. Thus there will always be at least one unique name assigned to the article.

If this setting is set to "yes" the Name Articles by Default setting will be ignored.

Publishers Publish by Default

Doc467: December 13, 2008 8:35 PM, Posted by Paul Needham, Edited by Jordan Frank

Publishers Publish by Default Default (yes) ▼

Indicates whether users' new articles and edits that they have permission to publish will be published by default.

In a moderation enabled project, if a user has Publish or Publish Own permission (In addition to Author or Comment), the Publish checkbox (see image below) may appear in the Article Editor or Comment form.



This Publishers Publish by Default setting determines whether the *Publish* checkbox in the Article Editor is checked or unchecked by default.

If set to "yes," the box will be checked (as in the image below) and the article will be published when *Post Article* is clicked.



Whether Publishers are allowed to toggle the checkbox is determined by Allow Publishers to Choose Whether to Publish.

Note: The checkbox only appears when creating or editing articles in projects where draft support has been enabled and then only for users who have Publish permissions.

Allow Publishers to Choose Whether to Publish

Doc471: December 14, 2008 8:32 PM, Posted by Paul Needham, Edited by Jordan Frank

Allow Publishers to Choose Whether to Publish Default (yes) ▼

Indicates whether users will be allowed to choose whether to publish new articles and edits that they have permission to publish.

This setting determines whether a Publisher will be allowed to toggle the *Publish* checkbox in the Article Editor.

If set to "yes," a Publisher can change whether the article will be automatically published when *Post Article* is clicked.



If Set to "No," the setting in Publishers Publish by Default will determine whether content submitted by Authors who have Publish permission is initially in a Published (Yes) or Draft (No) state. If the combination of controls force content into a Draft state, then a user with Publish (or Publish Own permission) would have to click "Publish" button in the interface after posting their article.

Note the following warning:



If you grant everyone in a project "Publish Own" permission, choose "Yes" for "Publishers Publish by Default", and choose "No" for this setting, you will effectively deactivate the publish feature for this project.

Moderation Project for Posting Comments

Doc474: December 14, 2008 9:41 PM, Posted by Paul Needham, Edited by Jordan Frank



Moderation Project for Posting Com-	ments Test 🔻
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The moderation project is used as the default project for posting comments on articles in this project.

Generally, you will want comments in the same project as the content it is commenting on - and, thus, will leave this setting in its original state (e.g. If you are setting up the Test project, leave this setting on the Test project).

However, If you want to encourage people to comment to a different project, you can use this setting to designate which project will appear by default in the *Project* selector when a user chooses to comment. Naturally, accounts must be given comment permissions for the chosen project (otherwise, they will see "-- select project --" and have to choose).

Generally, the value of using a moderation project for comments is that the accounts that have been given read or publish rights for the designated moderation project can be different from the project being commented on.

This setting does not FORCE comments into the default Moderation project, it just uses the selection you make a default suggestion. Use the y Posting Comments to Other Projects setting to force comments into a given project (or even to the project you are setting up).

Posting Comments to Other Projects

Doc475: December 14, 2008 9:55 PM, Posted by Paul Needham, Edited by Jordan Frank

Posting Comments to Other Projects

Comments Can Be Posted to Any Project

Indicates whether users will be allowed to post comments on articles in this project in projects other than the moderation project.

Though users generally comment into the same project as the article they are reading, by default it is possible to comment to any project where the user has Comment permissions.

This setting determines whether the user will be able to select alternative projects when commenting with the Article Editor or inline comment form.

If set to "Comments Can Be Posted to Any Project," users will be able to use the *Project* selector to choose to post the comment to another project where they have author permissions.

This setting works in conjunction with Moderation Project for Posting Comments.

Disabling Comments Entirely In a Given Project: If you want to disable commenting entirely within a given project (generally, wiki style projects used for scenarios like documentation), set this project to its "No" setting (Comments Cannot be Posted to Any Project) and Deny comments in the Permissions for the moderation project.

Inline Comment Settings

Doc137: March 22, 2008 4:04 PM, Posted by Documentation Importer, Edited by Christopher Nuzum



These settings control certain aspects of the inline comment form for users submitting comments to a particular project, namely: whether the inline comment form will include a label selector; whether the user must choose a label; what the default label is; and whether Visitors must enter their name and email in the fields provided with the inline comment form.

Show Label Selector in Inline Comment Form Default (no) Indicates whether the label selector will be displayed in the inline comment form, when the user chooses to post a comment to this project. Note that if the label selector is not displayed, the default comment label for this project will still be applied. Force Label Selection for Inline Comment Default (no) Indicates whether the user will be forced to choose a label when posting an inline comment to this project. If you choose to hide the label selector, this setting will be ignored, and the default label will be applied (which may be no label at all). Default Comment Label Inline Comment in the inline comment form, when the user chooses to post a comment to this project. Require Visitor to Enter Name When Commenting Default (no) Indicates whether a Visitor submitting a comment to this project will be required to enter their name.

Require Visitor to Enter Email When Commenting Default (no)

Indicates whether a Visitor submitting a comment to this project will be required to enter their email.

By default no label selector is present in the inline comment form, no label is applied, and Visitors are not forced to enter a name and email along with their comment. But in certain cases, it may be useful to set these properties for particular projects.

Show Label Selector in Inline Comment Form

Doc484: December 21, 2008 12:24 PM, Posted and Edited by Paul Needham

Show Label Selector in Inline Comment Form Default (no) ▼

Indicates whether the label selector will be displayed in the inline comment form, when the user chooses to post a comment to this project. Note that if the label selector is not displayed, the default comment label for this project will still be applied.



This setting determines whether the Label Selector is available in the inline comment form, not just the Article Editor window.

The label selector for the inline comment form is a simple pulldown menu which only allows selection of one existing label from the project that the comment will be written to. If the user selects a project where this setting has been set to "no," the label selector will disappear.

Force Label Selection for Inline Comment

Doc485: December 21, 2008 12:49 PM, Posted by Paul Needham, Edited by Jordan Frank

Force Label Selection for Inline Comment Default (no) ▼

Indicates whether the user will be forced to choose a label when posting an inline comment to this project. If you choose to hide the label selector, this setting will be ignored, and the default label will be applied (which may be no label at all).

When set to "yes," this setting requires at least one label to be applied to a comment posted via the inline comment form. As indicated, the behavior in this case depends on two other settings:

- 1) If a label has been selected in Default Comment Label, it will be selected by default when a comment is created using the inline comment form.
- 2) If Show Label Selector in Inline Comment Form is set to "yes," the designated default label will be selected and the user can use the label selector to select alternate labels to be applied. If set to "no," the designated Default Comment Label (if any) will be applied as the only label, unless the user opens the Article Editor window to access the label selector there.

Default Comment Label

Doc490: December 21, 2008 2:38 PM, Posted by Paul Needham, Edited by Jordan Frank

Default Comment Label ▼

This label will be the label selected by default in the inline comment form, when the user chooses to post a comment to this project.

This setting allows a default label to be set for comments made with the inline comment form.

- If left blank, and Show Label Selector in Inline Comment Form is set to Yes, the selector will appear but (as shown above) with no label designated.
- If a label is designated here, it will be selected by default when Show Label Selector in Inline Comment Form is set to "yes."
- If the Show Label Selector in Inline Comment Form setting is set to "no" and Force Label Selection for Inline Comment is set to "yes," the default comment label will be applied automatically as the only label.

Note: A default comment label is only applied when comments are allowed to be posted to the project it is set for. When comments are being posted to a different moderation project, or any other project a user



may select, the default comment label will not be applied. This is true even if the designated label exists in the other (moderation or selected) project.

Require Visitor to Enter Name When Commenting

Doc477: December 14, 2008 10:31 PM, Posted by Paul Needham, Edited by Jordan Frank

Require Visitor to Enter Name When Commenting Default (no) -

Indicates whether a Visitor submitting a comment to this project will be required to enter their name.

A "Visitor" is a user who can access your server, but has not logged in. If the Visitor account is given comment permissions, the Visitor will be have the option to include their Name and Email address. (note, however, all comments made by a Visitor will show as Authored by "Visitor" - the Name and E-mail address information will appear in the comment footer).

When this setting, "Required Visitor to Enter Name When Commenting" is set to "yes," the user will have to provide a value in the Name field.

There is, of course, no assurance that people commenting on your server as Visitor will enter their real names, but this does provide a way to require it.

To also require an email address, use Require Visitor to Enter Email When Commenting.

Require Visitor to Enter Email When Commenting

Doc478: December 14, 2008 10:36 PM, Posted by Paul Needham, Edited by Jordan Frank

Require Visitor to Enter Email When Commenting Default (no) 🔻

Indicates whether a Visitor submitting a comment to this project will be required to enter their email.

A "Visitor" is a user who can access your server, but has not logged in. If the Visitor account is given comment permissions, the Visitor will be have the option to include their Name and Email address. (note, however, all comments made by a Visitor will show as Authored by "Visitor" - the Name and E-mail address information will appear in the comment footer).

When this setting, "Required Visitor to Enter Email When Commenting" is set to "yes," the user will have to provide a value in the Email field.

There is, of course, no assurance that people using the Visitor account will enter their real email address, but this does require that a value is provided.

To prompt for the user's name, use Require Visitor to Enter Name When Commenting.

Unreadable Content Post Confirmation Messages

Doc308: March 22, 2008 4:24 PM, Posted by Documentation Importer

Sometimes a project's access controls are such that a user can post an article or comment, but cannot read it. In these cases, users will see a confirmation message. These three settings allow project



administrators to customize the confirmation message depending upon whether the article posted was a comment, an email reply, or an ordinary article:

Unreadable Content Post Confirmation Messages

Unreadable Article Post Confirmation Message

If a user submits an ordinary new article in a project in which they do not have Read or Read Own Articles permission, this is the message that will be displayed in the submission confirmation view. The text {0} and {1} will be replaced by the Traction ID or title of the article or item being commented on and the project in which the comment was posted, respectively.

Your new article has been posted to the {0} project.

✓ Use Default Value (Your new article has been posted to the {0} project.)

Unreadable Comment Post Confirmation Message

If a user creates a comment in a project in which they do not have Read or Read Own Articles permission, this is the message that will be displayed in the submission confirmation view. The text {0} and {1} will be replaced by the Traction ID or title of the article or item being commented on and the project in which the comment was posted, respectively.

Your comment on {0} has been posted to the {1} project.

Use Default Value (Your comment on {0} has been posted to the {1} project.)

Unreadable Email Reply Post Confirmation Message

If a user creates a mail reply in a project in which they do not have Read or Read Own Articles permission, this is the message that will be displayed in the submission confirmation view. The text {0} and {1} will be replaced by the Traction ID or title of the article being replied to and the project in which the reply was posted, respectively.

Your email reply to {0} has been posted to the {1} project.

■ Use Default Value (Your email reply to {0} has been posted to the {1} project.)

For example, we might wish to allow ordinary users to post a tip to the Intelligence project, but we might want that project to be, for those users, a drop box, into which they post an article with which they will have no further involvement. In that case, we might want to change the confirmation message to, "Thanks for your tip!"

Unreadable Article Post Confirmation Message

If a user submits an ordinary new article in a project in which they do not have Read or Read Own Articles permission, this is the message that will be displayed in the submission confirmation view. The text {0} and {1} will be replaced by the Traction ID or title of the article or item being commented on and the project in which the comment was posted, respectively.

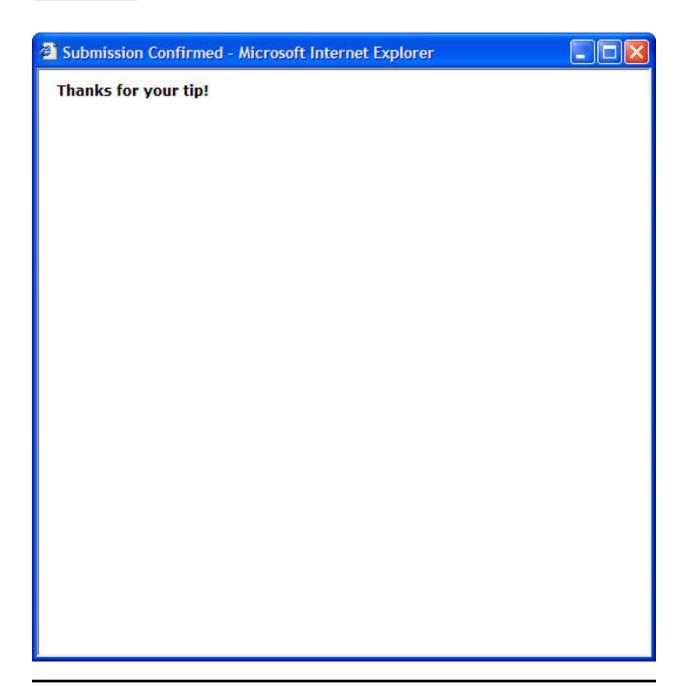
Thanks for your tip!

Use Default Value (Your new article has been posted to the {0} project.)

osc berault value (rout new article has been posted to the (o) project.)

Users who post a new article to this Intelligence project will now see this confirmation message:





Entry Filters

Doc96: March 22, 2008 3:57 PM, Posted by Documentation Importer

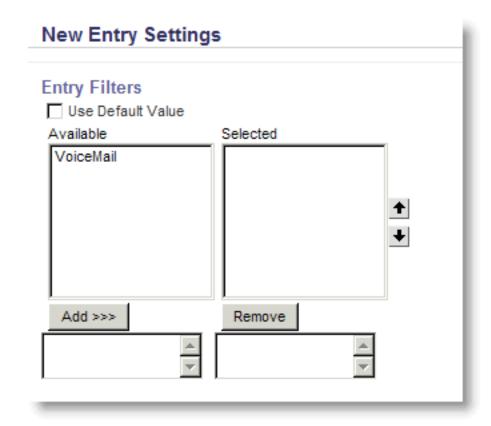
New Entry Settings

Entry Filters

Traction supports add-on extensions that allow entries to be transformed before they are saved. Individual



projects can override the set of active and inactive entry filters.



The default set of active entry filters can be specified in Server Setup | Defaults by clicking the Edit Default Project Settings button.

Number of Files to Show in Shared Folder Portlet

Doc184: March 22, 2008 4:10 PM, Posted by Documentation Importer

Number of Files to Show in Shared Folder Portlet







Number of Files to Show in Shared Folder Portlet

Number of Files to Show in Shared Folder Portlet



The number selected here represents the maximum number of files to be displayed in the project share folder portlet.

This control determines how many files appear in the sidebar listing of recently modified shared files. It can be set between 0 and 20.

Automatically Version Control Attachments

Doc16: March 22, 2008 3:46 PM, Posted by Documentation Importer

Automatically Version Control Attachments



Puts under version control all newly created attachments to articles in this project. This will ensure a complete auto trail of all changes to attachmnets.

This project preference determines whether attachments to articles in this project are placed under version control.

This feature requires a WebDAV attachment store. To learn more about this feature, see the section Putting a File Under Version Control.

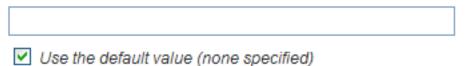
Override Email Reply Subject

Doc190: March 22, 2008 4:10 PM, Posted by Documentation Importer

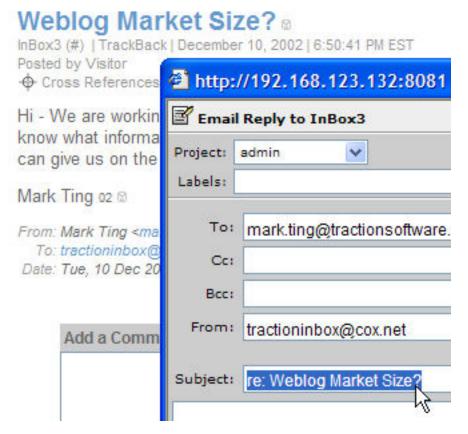


Override Email Reply Subject

This subject will be used instead of the normal default subject which is either "re: [the original subject]" or the name of the reply template being used.



Normally, the default reply message's subject is the standard email message threading subject, "re: <original subject>" (or, if the original message's subject already begins with some form of "re:", then simply "<original subject>"), e.g.



This project preference allows administrators to change the default reply message subject.



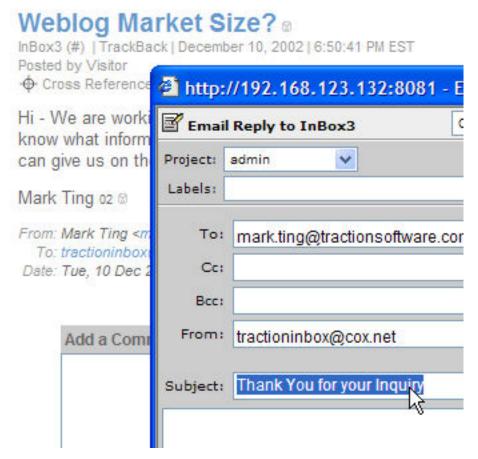
Override Email Reply Subject

This subject will be used instead of the normal default subject which is either "re: [the original subject]" or the name of the reply template being used.

Thank You for your Inquiry

Use the default value (none specified)

Using the value in the above example would result in this subject:



The user typing the email reply can still change the subject.

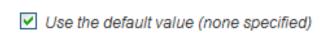
Override Email Reply From Address

Doc189: March 22, 2008 4:10 PM, Posted by Documentation Importer, Edited by Christopher Nuzum



Override Email Reply From Address

This from address will be used instead of the preferred email address of the person sending the reply.

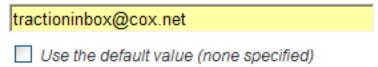


When a user is using the email reply feature to reply to an email message, the "from" address is initially from their preferred email address. This project preference allows an initial value to be specified that universally overrides the initial "from" address for email replies to entries in a particular project.

For example, it may be desirable for replies to articles emailed to the InBox project to always be listed as having originated from the InBox project's email address. In that case, we might specify:

Override Email Reply From Address

This from address will be used instead of the preferred email address of the person sending the reply.

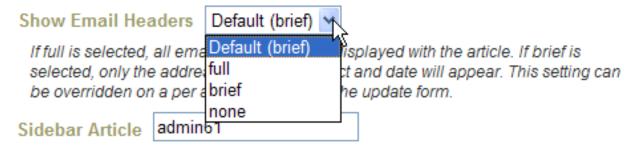


Then when we reply to an email message logged to the InBox project, the "From:" field will initially have the value we've specified:



Show Email Headers

Doc269: March 22, 2008 4:20 PM, Posted by Documentation Importer



Traction preserves all email headers, both for email messages received and email messages sent. By default, a "brief" version of the headers, including only the most common fields, is displayed in a block at



the bottom of the entry. Sometimes, it can be useful to set the default "header volume" setting for a particular project to something other than the "brief" treatment. This project preference allows administrators to set the header volume to brief, full, or none.

The *brief* header volume might look like this:

Weblog Market Size?

:MarketResearch:done :MarketResearch:question

InBox3 (#) | TrackBack | December 10, 2002 | 6:50:41 PM EST Posted by Visitor

Cross References

Hi - We are working on a second stage market plan for the Alpha product and need to know what information you have on the size of the Weblog market. Any pointers you can give us on the business and consumer side would be interesting. Thanks! 01

Output

Description:

Mark Ting 02 ®

From: Mark Ting <mark.ting@tractionsoftware.com>

To: tractioninbox@cox.net

Date: Tue, 10 Dec 2002 18:49:19 -0500

The full header volume includes all headers, and might look like this:



Weblog Market Size?



InBox3 (#) | TrackBack | December 10, 2002 | 6:50:41 PM EST Posted by Visitor

· Cross References

Hi - We are working on a second stage market plan for the Alpha product and need to know what information you have on the size of the Weblog market. Any pointers you can give us on the business and consumer side would be interesting. Thanks! 01 ®

Mark Ting 02 8

Return-Path: <mark.ting@tractionsoftware.com>

Received: from twisted1.bdol.com ([208.139.47.10]) by fed1mtai03.cox.net (InterMail

vM.5.01.04.05 201-253-122-122-105-20011231) with ESMTP id

<20021210234840.GHOA15461.fed1mtai03.cox.net@twisted1.bdol.com>

for <tractioninbox@cox.net>; Tue, 10 Dec 2002 18:48:40 -0500

Received: from muck ([208.139.47.11]) by twisted1.bdol.com (8.11.6/8.11.0) with

ESMTP id gBANmen31413 for <tractioninbox@cox.net>; Tue, 10 Dec

2002 18:48:40 -0500

From: "Mark Ting" <mark.ting@tractionsoftware.com>

To: <tractioninbox@cox.net> Subject: Weblog Market Size?

Date: Tue, 10 Dec 2002 18:49:19 -0500

Message-ID: <001101c2a0a6\$c1c677e0\$937ba8c0@muck>

MIME-Version: 1.0

Content-Type: text/plain; charset="us-ascii"

Content-Transfer-Encoding: 7bit

X-Priority: 3 (Normal)

X-MSMail-Priority: Normal

X-Mailer: Microsoft Outlook, Build 10.0.2627

Importance: Normal

X-MimeOLE: Produced By Microsoft MimeOLE V6.00.2600.0000

The *none* header volume option causes the header block to be omitted completely.

This option does not affect what email header information is stored in Traction's journal; it affects what is displayed only.

Newspage Sections

Doc181: March 22, 2008 4:10 PM, Posted by Documentation Importer, Edited by Paul Needham

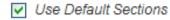
Write this. See Sections Overview for more detailed information on the section settings.



Newspage Sections

You can customize Traction so that the sections you choose appear on your Project Newspage. In Server Setup, you can specify the default set of Sections to appear on each Project Newspage. In Project Setup, you can override the default and customize the sections for that Project.

In the title of the section, {0} will be substituted with the current Project name.



This lets you define the sections that should appear on the newspage.

Sections Overview

Doc22: March 22, 2008 3:46 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Using sections, you can make your Front page or a project newspage as simple as a single page or blog-style list of articles, or you can create a dashboard with section panels displaying any cross section at any volume level -- you can show as little as just titles or entire pages within a section.

Sections can be used as Front Page Sections, Newspage Sections, Article Sections, Profile Sections, Email Digest Sections and in filtering Email Notifications.

Sections may be filled by dynamic queries or static lists that you indicate in the section configuration or in a Collection. You can create sections based on any of the following criteria, and, in many cases, you may include additional boolean conditions by limiting on search criteria:

- Recent articles and comments, for all projects or a specific project
- Recent edits, for all projects or a specific project
- Recent discussions, for all projects or a specific project
- Recent Page Naming Activity including new, requested, removed, and renamed page names as well
 as orphaned pages
- Recent Page and Comment Moderation Activity including actions taken to Publish, Reject, Lock and Unlock articles or comments.
- Tagging: Label, Label Added or Label Removed conditions for all projects or a specific project (articles which have/had a given label - ordered based on date posted, the date they were tagged with the label, or the date the label was removed from the article)
- Search and FAST Search Module driven queries
- A Collection belonging to and managed a given user
- Specific articles which you cite by Traction ID

Sections can be sorted based on alphabetical (forward or reverse), chronological (forward or reverse), random, discussion activity or in a specified order.

Sections may be configured to show as much or as little content as you like. You can configure sections to display:

- Titles: just the title
- Details: Title plus Author, Date Posted, Number of Comments and Number of Attachments
- Snippets: Title, Details, and a set number of characters with formatting removed



- Brief: Title, Details, and the first paragraph (and other paragraphs that have labels)
- Full: Title, Details, and full article content (showing comments and attachments, if desired)

In Brief and Full sections, it's possible to suppress the Title and Details information - so that the article content floats in the section space.

If you have activated Page and Comment Moderation, sections can be set to show or exclude articles and comments which are in Published, Unpublished, Rejected, Locked or Unlocked status.

The contents of all sections are displayed with permission filters applied, so that users only see information to which they have read rights.

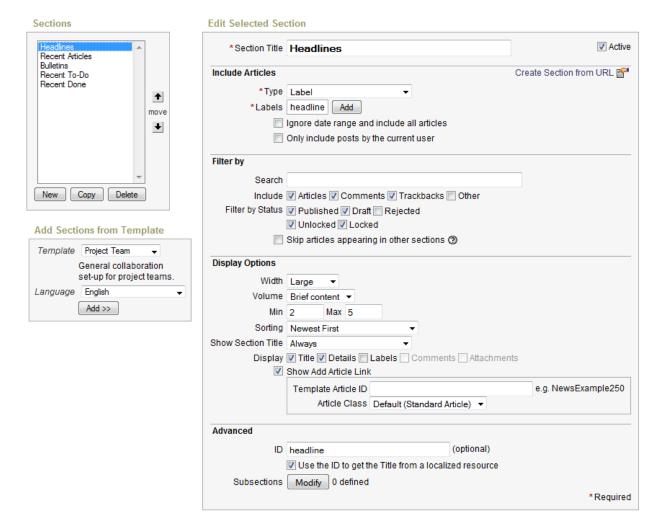
This help topic covers

- 1. What the various section configuration settings do
- 2. An example of the Front Page section setup (server admin permissions required)
- 3. How to edit the default sections for all projects (server admin permissions required)
- 4. An example of Project Newspage specific section setup (project admin permissions required)
- 5. An example of using a section in the body of an article
- 6. An example of the *Email Digest* section setup (available at both server and My Account levels)
- 7. An example of using a section to filter *Email Notifications*

What the Section Configuration Settings Do

The basic *Edit Section* form provides a number of settings that can be used to configure how a section acts and appears.





The English Default *News* Template sections, as shown above, are Headlines, Recent Articles, Bulletins, Recent To-Do and Recent Done. Notice that the sections can be re-ordered and edited. The following describes the values for each line in the *Edit Selected Section* side of the form.

Review the Project Templates help topic to learn about the default templates.

Section Title

This is how the section will be titled where shown. You can name it anything you like. The section title can be suppressed in the Display Options.

The {0} Option in Section Titles

You can edit the existing sections or add new ones. Anywhere you see {0} text, the corresponding screen in Project *Newspage* section setup will be replaced with the Project name itself, so the title text *{0} Headlines* will become *TaskForce Headlines* in the *TaskForce* project (see the Project *Newspage* section setup screen below). This option is most commonly used in Digest Sections, wherein the *{0}* Articles section iterates over all the digest projects and, therefore, lists out a series of sections that appear as *Alpha Articles* followed by *Beta Articles* and so on.



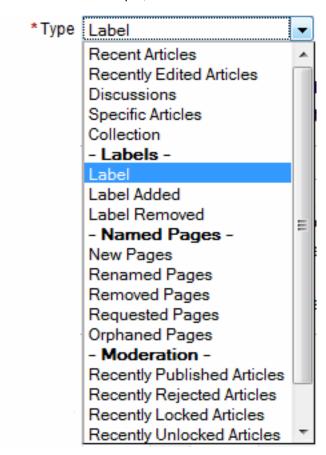
The Active Checkbox

When this box is checked, the section is active. Unchecking this box allows you to keep this section and its settings in the list, but have it be inactive so it doesn't actually display to users.

Include Articles

Type

This drop down allows you to drive the content of the section. There are a large number of *Type* options. In the *Headline* example, *Label* is chosen and the :*headline* label is chosen from the list.



Recent Articles

This will cause the most recent articles in a given timeslice to appear.

Recently Edited Articles

Selecting this *Type* will selected articles that have been edited at least once. As opposed to *Recent Articles*, you do not have the *Include* option to select *Comment*, *Trackback* or *Other*.

Discussions

This section Type is used to make it easy to show and consolidate "discussion threads," that is articles



which have one or more nested comments. Only articles that have at least one comment will be included and the hierarchy of comments made on other comments in a thread will be clearly displayed.

When the *Discussions* section *Type* is chosen, four additional sort orders are available in the drop down: Last Active Thread First, Earliest Active Thread First, Most Commented-on First and Least Commented-on First.

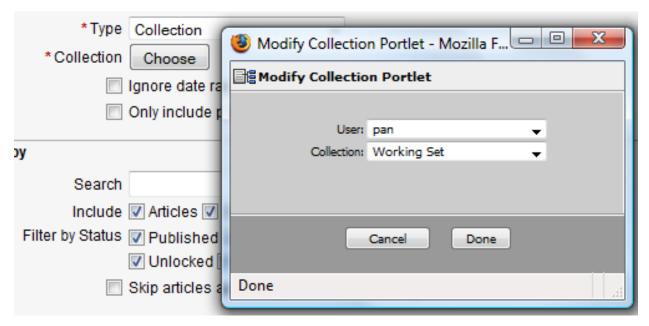
In a Traction TeamPage deployment involving a lot of comments, a Recent Articles and Comments section may end up showing 10 comments in a row with the same title (e.g. "re: Budget Meeting"). In this case, it may be preferable to remove comments from the Front Page Recent Articles section and add a Discussions section showing Last Active Thread First.

Specific Articles

This *Type* allows you to specify one or more specific articles to display by typing in the Traction ID (project name and a number, e.g. Engineering10) of each. Such a section is not "dynamic" in that you must edit the section definition if you wish to change which articles are displayed.

Collection Option

Choose this *Type* if you want to make an arbitrary list of articles which you actively control appear in the section. You then have to choose a collection. Collections are made by individual users and can be named. You will be able to select a user and any of that user's saved collections.



Note: If you select this option, when users click the resulting *Section Title* link, the selected *timeslice* will not change but Traction will show a view of all articles in the specified collection.

Label Options

If you chose the *Label, Label Added*, or *Label Removed* option, then you have to choose one or more labels by clicking the *Add* button to the right of the *Labels* line or by manually typing in the appropriate label.



Label vs Label Added and Label Removed: The *Label* choice will cause an *article* marked *Headline* to appear in the *timeslice* that the associated *article* was posted. The *Label Added* or *Label Removed* options order articles based on the date/time an action was taken to tag an article with a given label or the date/time an action was taken to remove (un-tag) a label from an article.

Note: This will also impact the *Newest First* and *Oldest First* sort orders. If the section is set to a type of *Label*, the date used for sorting will be the article date. If set to a type of *Label Added* or *Label Removed*, the date used for sorting will be the date that the label was added or removed.

Named Pages Options

See Page Name Management and Name History for information on these options.

Moderation Options

See Page and Comment Moderation for information on these options.

FAST Search Options

These are only available if you have the optional FAST Search Module installed. See Using FAST Searches in Sections.

Ignore Date Range and Include All Entries

Checking this option causes the section to ignore the selected *timeslice* and ignore the *min* and *max* settings. For example, this is the default in the *Bulletins* section. You would want to use this setting to show important articles that are "timeless" - in sections for content like bulletins, FAQs, Policies and so on

Note: If you select this option, when users click the resulting *Section Title* link, they will be taken to an *All Time* view showing all the articles meeting the criteria specified in the section definition.

Only Include Posts by the Current User/Only Include Posts by this User

Checking Only Include Posts by the Current User will filter the section for matching articles authored by the the user that is logged in and reading the section.

In the case of a Profile page, the Only Include Posts by this User option filters by the account that the Profile is for.

Create Section from URL

When you click this link, you will be able to enter a URL from a Traction view which Traction will parse to create the section settings. This is particularly useful when creating sections based on FAST Search Module views.

Filter by

The **Section Type** setting in **Include Articles** above is the primary filter for section content. The **Filter by** settings let you drill down further and filter by content type (article or comment) or moderation status (published, draft or rejected)



Filter by	
Search	
Include	✓ Articles ✓ Comments ✓ Trackbacks Other
Filter by Status	☑ Published ☑ Draft — Rejected
	✓ Unlocked ✓ Locked
	Skip articles appearing in other sections ②

Search

You can constrain the list of articles to be shown in the section based on a Rapid Selector expression.

See the **Project Newspage Section Setup** screenshot below for an example of constraining a list of articles with the *Objective label* to only the subset that is also marked with the *ToDo* label. The expression used there is "i(:objective and)" which ensures that the two labels appear together (at the title or paragraph level)

Another useful example is to filter a Recent Edits section, which could be very "noisy," for a certain type of content, such as the articles with the *requirement* or *policy* label. To do this, simply add ":requirement" to the search box.

Include

Using checkboxes you can specify any combination of Articles, Comments, Trackbacks and Other.

The *Other* option is rarely used, it is for events like Reclassification (when labels are changed) and Update (when articles are edited) events.

Filter by Status

If Page and Comment Moderation is being used, you can filter by the status of articles and comments.

Skip Articles Appearing in Other Sections

If you click this, the page will not include articles that are already displayed in a previous section, *If and only if* the previous section was also set to *Skip Articles*.

Display Options

The display options allow you to specify the width (how many "columns" in the interface), volume (titles to full article), number of articles, and sorting. You can also constrain how much meta-data appears (e.g. title, author/date details).



Display Options	
Width	Large 💠
Volume	Full content 💠
Min	Max
Sorting	None
Show Section Title	Never 💠
Display	☑ Title ☐ Details ☐ Labels ☐ Comments ☐ Attachments

Width

The effect of the width setting depends on the skin that is used and the view type. In the default skin (mexico) Front Page and Project Newspages, *Large* is full width while *Medium* results in a two column layout and *Small* results in a four column layout.

However, in the default skins, single articles and email digest views ignore the width setting.

Note that the actual behavior of the sections is determined by both the Width setting of a given column and the Width settings of the sections before and after it. For instance, if a *newspage* has only two sections, the first set to *Large* and the second set to *Medium*, they will both appear as full page width, since the first section is not allowed to display as less than this width. Traction adjusts the behavior of the section set to *Medium* to that of *Large*, as it provides no benefit to show it at half page width.

Volume

A pulldown menu provides the same *Volume* selections that are available in a Traction view: *Titles*, *Details*, *Snippets*, *Brief Content* and *Full Content*.

Brief volume generally displays Title and the first paragraph (or Item block) but may display other paragraphs matching a tag that is specified in the **Section Type in the Include Articles** settings and **Search** parameter in the **Filter By** settings. Brief will also display images if they are in the selected paragraph. The text in a *Snippet* volume displayed follows these same rules.

Min and Max

These sections designate the minimum and maximum number of articles or comments to display in the section.

Min: If the Minimum is positive (e.g. 5), it will show at least the Min number of articles or comments, drawing from earlier *timeslices* if nothing is posted in the current *timeslice*. If the *timeslice* is set to All (the default), then the Min setting is ignored.

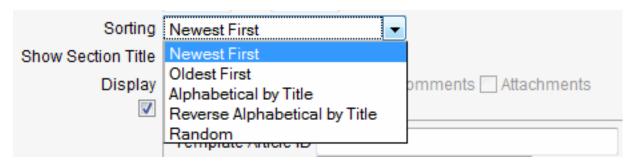
Max: Set this to control the amount of space this section takes up when there are a large number of articles that match its criteria. When there are more than the specified number of articles, a link *Read More* {section name} will be automatically shown at the end of the displayed list.

If you do not specify a maximum, there may be an unlimited number of articles or comments from the *timeslice* in this section.



Sorting

You can choose whether the sections should show content with Newest Articles First (the default), Oldest First, Alphabetical by Title, Reverse Alphabetical by Title or Random.



In the case you create a section based on a *Collection*, you also have the option *None*, which will result in sorting based on actual the sort order of the articles in the collection.

When a section *Type* of *Discussions* is chosen, four additional sort orders are available in the drop down: Last Active Thread First, Earliest Active Thread First, Most Commented-on First and Least Commented-on First.

Show Section Title

You can choose whether the section title shows *Always* (the default), *Only if Section has Content* or *Never*. Generally, you will keep the default to display the section title, but the ability to turn it off provides a great deal of control over the display of the section.

Display

You can use the provided checkboxes to specify whether you want the section to display any combination of *Title*, *Details*, *Labels*, *Comments* and *Attachments*. Note: some options may be grayed out as unavailable based on the section *Type* and *Volume* selected.

Turning all display options off can make a page stand-alone nicely on a wiki style newspage or can make a series of articles take on the appearance of a single article.

Show Add Article Link / Button

Including the Add Button encourages users with Author permissions to add to the section.

When this checkbox is checked, an *Add* button will be displayed as part of the section title. When clicked, the *Add New Article* form will be invoked and populated with such labels as are specified in the section setup.

The concept is to make it easy to create a new article that is automatically added to a particular section. The box can be unchecked to hide the button when this action does not make sense for a given section.





Additionally, it is possible to specify a template article to be loaded or a custom form to be called when the *Add* button is clicked. Either enter the Article ID of the template article or use the pulldown menu to select a custom form that has been installed via the Traction plug-in interface.

Advanced

ID

The ID line is optional and is required only if there is already or you are going to create a localized (language) resource for this section. In this case, you can create a corresponding section for the other language which has the same ID but a different Title and the equivalent set of content based on a label.

Subsections

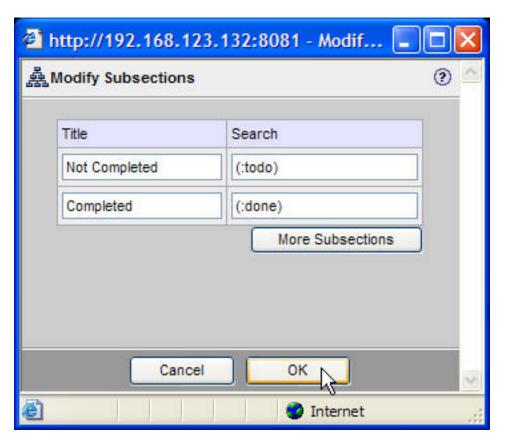
Subsection links appear in sidebar if your skin settings specify that Section Links should display. They offer an easy way to drill down to a set of content that is more specific than the section will display. For example, if a section calls for articles tagged *Objective*, a subsection may call for the set that also have a *To Do* or *Done* label. The sections editor lets you define subsections. Subsections are ways of partitioning sections using a search or rapid selector expression (see Introduction to the Rapid Selector Guide).

To launch the subsection editor, click Modify.



You can define subsections by typing a name and a search expression. You can add more slots for subsections by clicking the *More Subsections* button.





When you have finished, click OK, then apply your changes on the main page.

Currently subsections are displayed *only* in the left sidebar, and only if the option in Customizing Skin Settings to display sections in the sidebar is activated.





Each subsection is a link to the subset of the articles in the main section that match the search criteria. The title of the subsection is displayed in the locator after the section name, separated by a pipe "|" character, e.g.:

traction



Add Sections from Template

This menu appears below the list of sections. It allows you to add sections from a pre-defined template (templates are setup in config files). This is a fairly advanced feature, so use it with care, or call for support if you need assistance.



If, for example, you stripped down the sections in a project and want to add back the *Project Team* sections (e.g. Meeting Notes, Questions To Do, and so on) you can do this by selecting the Project Team template and clicking *Add*.

Add Sections from Template



After adding sections from a template, review the sections that filter by Label to ensure that you have included the matching labels in Project Setup - Labels.

Front Page Specific Sections

When you click the *Front Page* tab in *Server Setup*, you can access a *Edit Section* form specifically for the *Front Page*. See Front Page Sections for more detailed information.

The Traction TeamPage server will use default sections for the *Front Page* unless the *Use Default Sections* checkbox is unchecked, at which point the *Edit Section* form will be shown to allow you to make modifications.

Frontpage Sections

You can customize Traction so that the sections you choose appear on your Frontpage.



Many of the sections on the *Front Page* are used to collect together articles from multiple projects. The wildcard, *, is used to denote "all projects," so, for instance, when you look at a section with a *Type* of *Label* for headlines in all projects, the label syntax is "::*:headline."

Default Project Newspage Sections

Unless otherwise specified, new Traction projects will use the default sections specified at the Server Setup level. In Server Setup / Defaults / Project Newspage / Content, you can uncheck the *Use Default Sections* checkbox to access the *Edit Section* form and modify the default sections that projects use.



Newspage Sections

You can customize Traction so that the sections you choose appear on your Project Newspage.





✓ Use Default Sections

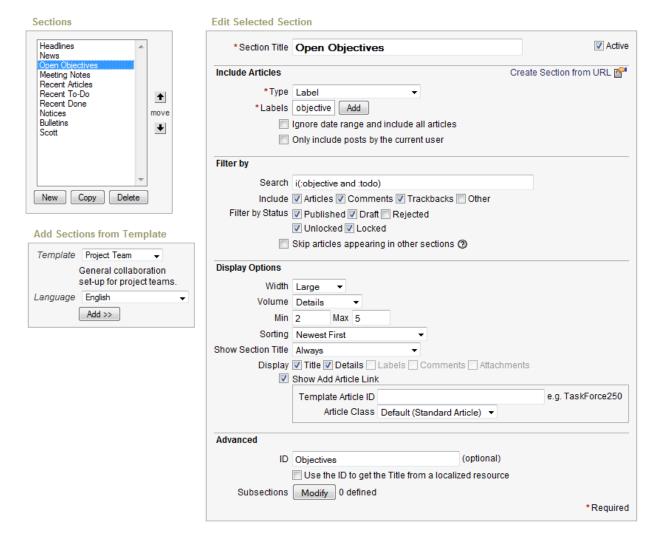
As indicated by the note, the modified default project sections that you create can be overridden on a project by project basis. Each project administrator can tailor a specific project's Newspage sections to fit the needs of the people using it.

Project Newspage Specific Sections

When a project administrator goes to Project Setup / Newspage / Content, the Edit Section form can be used to customize the sections for the selected project. See Newspage Sections for more detailed information.

In the example below, you see the Edit Section form for the TaskForce project. The areas in the default settings that had a {0} marker are now replaced with the TaskForce project name. Also, in the example below, the Open Objectives section is defined. It looks up articles with the Objective label, then refines the view to only those articles that ALSO have the ToDo label. (In this case, "i" specifies that both labels must be present together at the "item" level, that is a match will not occur if one label is at the article level and the other is at the paragraph level or if the labels are on different paragraphs of the same article.)





Using Sections in an Article

When editing an article in the *Article Editor*, you can use the use the *Edit Section* form to define sections that can be inserted into the body of the article. See Article Sections for more detailed information.

There are two steps to the process:

- 1. Clicking the *Add sections* link in the upper right invokes the *Section Editor* letting you define sections to be used in the article.
- 2. You then place a section into the body of the article by using the *Insert/Edit Widget* icon on the toolbar and selecting *Article Section*.

Tip: Expert users can avoid the second step (*Insert/Edit Widget*) by entering the appropriate *Rapid Selector* link syntax into the article. The syntax is "[[/section 1]]" where the 1 refers to the first section defined using the *Edit Section* form. You can replace the 1 with the Section ID value that you can associate with any given section.

Using Sections in a Profile Page

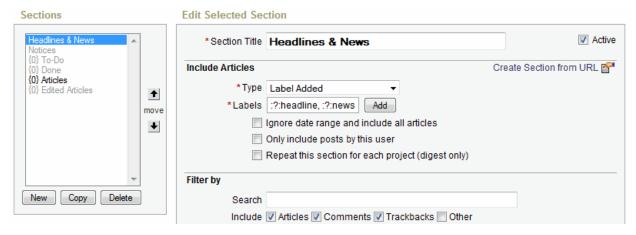


The default sections for a Profile Page show articles and comments authored by the user of the profile being viewed. However, a system administrator or the user can customize the sections shown in a Profile Page as desired. See Profile Sections for more detailed information.

Email Digest Specific Sections

When you click the off the checkbox for *Use Default Sections* in the *Digest Sections* entry in the *Server Setup / User Subscriptions / Email Digest* tab, you can access the *Edit Section* form to modify the default sections used by the *Email Digest*. See Digest for more detailed information. This same process also applies to personal email digests defined in *My Account / Subscriptions / Email Digest*.

You can see in the example below, that the *Headlines* & News section will pick up all articles for which the Headline or News label was added since the last digest.

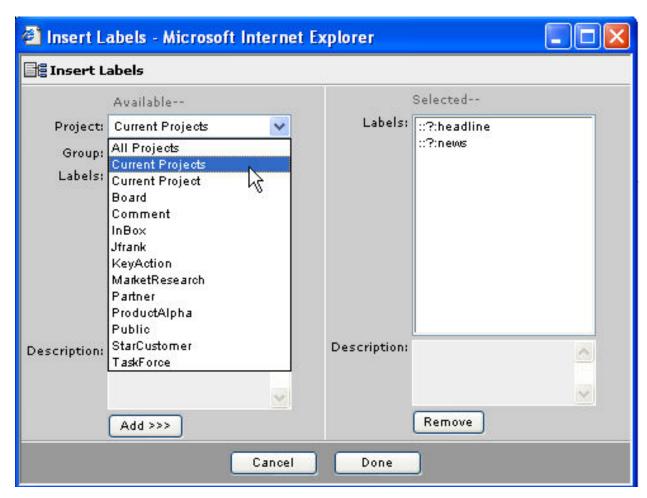


Note the use of the ? wildcard in this example. The ? wildcard refers to all projects listed in Digest Projects setting which is specified in Server Setup | Defaults | Subscriptions - Digest tab. Each user may override the Digest Projects setting in their own Personal Setup | Subscriptions - Digest tab. This is different from the * wildcard which refers to all projects that can be read by a particular user.

The label picker accessed by clicking the *Add* button to the right of the labels box causes the *Insert Labels* dialogue to show up (see below). For sections like *Headlines & News* that group information from many projects, you want to select "Current Projects" which will use the ? wildcard (choosing All Projects will use the * wildcard and, thus, ignore the *Projects to Include in Digest* list).

If you are making or editing a section that repeats for each project group, choose "Current Project" which will not use any wildcard. If you are creating a section specifically for a project (a rare case for the digest) then choose the project itself.





Repeat this section and {0} Articles

The combination of using *{0}* in the name of the digest section *and* checking the *Repeat this section* box causes Traction to iterate over the project list, write section headings that replace *{0}* with the project name, and output the title and first paragraph of each article in the corresponding sections.

Digest Style Selection and Customization

While not directly tied to setting up digest sections, it is important to note that the behavior of the digest is greatly influenced by one of the settings available for customizing the digest style. When you pick a style such as *Block*, you can click *Customize* to further tailor the digest style.



Among the various options you can modify, you will find this one:



Group by Activity Instead of by Section Default (yes) ▼

If set to yes, a variation of the digest will be rendered that combines all sections and shows each item only once, in context, using styles to denote the source section.

The *Group by Activity* setting is usually the best selection when digests include projects that consistently have a large number of nested comments. When this setting is set to Yes, the sections you have specified are used to determine what content appears but the content is organized strictly by project rather than section.

Changing the setting to "no" will produce digests where sections are displayed as specified in the section editor (e.g. a *Headlines* section spanning all projects may appear at the top of the digest - and then content for each project may appear in a section for each project).

Viewing the digest

You can test the digest by sending it now (see Server Setup - Email Tab), but that will send it to all recipients and will exclude all included articles from the next scheduled digest.

Another option is to simulate a digest view. To do this, go to your Front Page and type "/type digest_html" or "/type digest_text" into the search box. If you have a lot of content on your server, add the W or M parameter to scope to the current Week or Month: "/w type digest_html"

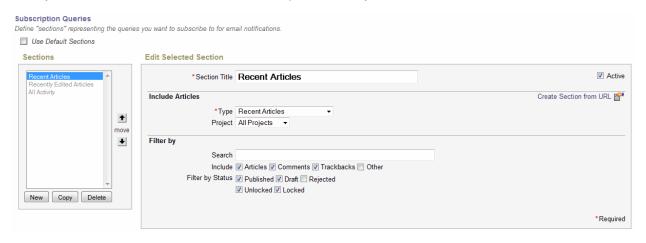
Filtering Email Notifications using Sections

When setting up defaults for *Email Notifications* at the server level or when defining this for an individual account in *My Account / Subscriptions - Email tab*, Traction provides the option to use sections to filter notifications. See Filter Notifications Using Sections for more detailed information.

Filter Notifications Using Sections Default (yes) ▼

Define sections to get more control over what notifications you'll receive.

When the *Use Default Sections* checkbox is unchecked, a simplified *Edit Section* form will be shown to allow you to customize the sections used to help filter when you receive email notifications.





Project Templates

Doc223: March 22, 2008 4:14 PM, Posted by Documentation Importer

Project Template Defaults

Project templates allow you to collect a common set of labels, newspage sections, and other properties associated with a particular type of project, and to create new projects that take on the template's properties. Labels and newspage sections can be copied from a project template at project creation time, or at any time after.

As of version 3.7, Traction's standard project templates are:

- Blog use this template for a project that will serve as an ordinary blog. It has a typical complement of labels. Its sections are Recent Articles, Recent Comments, Recent To-Do, and Recent Done.
- Intelligence this template can be used for projects that will serve as a space for gathering competitive intelligence information. It has additional CI-oriented labels, such as question, objective, HUMINT, and analysis, and several sections: Headlines, Analysis Reports, Questions To Do, Objectives To Do, Recent Articles, Bulletins, Recent To-Do, and Recent Done.
- News for use with a project that will be a space for news and information. It has a usual complement of news-oriented labels, and it has Headlines, Recent Articles, Bulletins, Recent To-Do and Recent Done sections.
- Project Team use this template to create a project for team collaboration. Besides the usual labels, this template has collaboration-oriented tags such as status, issue and meeting. Its sections are Headlines, Status Report, Meeting Notes, Issues To Do, Questions To Do, Recent Articles, Bulletins, Recent To-Do, and Recent Done.
- Wiki this template should be used to create projects that will be used as wikis. This template is special, because it doesn't have any special labels, but it has other special properties. It defines only one newspage section, which is a specific articles section that simply points to article 1 in the created project, effectively making the newspage an authored page that is governed by a single article. It also sets the Default Entry Style to Page instead of Article, since in a wiki project model, entries are meant to represent wiki pages.

All the standard project templates have the headline, to do, done, and FYI, labels, and the Project Team, Intelligence, and News templates all have bulletin and FAQ labels.

The template files can be edited, but it is recommended that instead of editing a standard template, you make a copy and make it an entirely separate template (this will prevent your changes from being overwritten or deleted during software upgrades). Naturally, you can also add your own project template files created from scratch. These files are located in a standard location. To see them:

From your browser:

http://traction.example.com:port/config/project/templates

On the computer running your Traction Server (assuming the software was installed directly under drive C:)

C:\Program Files\Traction\traction\server\config\project\templates



Creating Your Own Project Template

If you are interested in creating your own project template, please read the Traction Knowledge Base article, "How do I create my own project template?".

Project Navigation Links

Doc210: March 22, 2008 4:12 PM, Posted by Documentation Importer, Edited by Jordan Frank

Navigation Links

As of version 3.7, Traction supports customizing the left-hand navigation panel that appears in the Mexico, Ocean, and Earth skins using an XML template that specifies the hierarchy and positioning of navigation elements.

These two project settings allow a project administrator to indicate whether to use the XML-driven customized navigation interface for views centered on a particular project, and what XML to use. (This can also be done for the front page; see Frontpage Navigation Links.)



Navigation Links

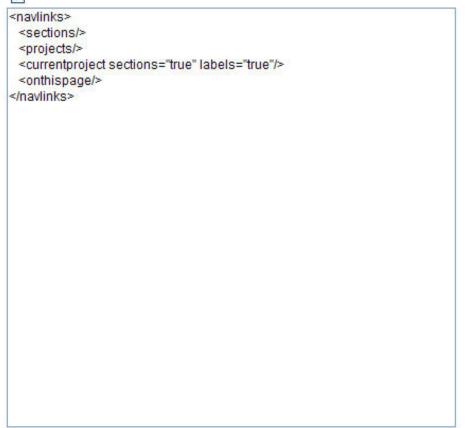
Override default navigation with content specified below in XML? Default (no)

This setting allows you to activate and deactive the override of the default navigation for certain skins using an authored XML fragment specified below.

Navigation Links XML Template

If enabled above and supported by the skin, the normal navigational elements usually displayed in the left column will be controlled instead by this XML fragment.

✓ Use Default Value



The root of the XML template must be the navlinks tag. Here is a list of the other tags that may appear in the XML template, and an explanation of what Traction will render in the location in the hierarchy where the tag appears:

- sections renders links to expanded views of the sections defined for the front page, if the user has elected to display them in the current context (the default behavior is to display this list on the front page only, so ordinarily, these links won't appear on views centered on a single project).
- projects renders a project activity listing, that may be a flat text listing or a selector depending upon the user's preference.



Projects
Engineering (81)
Executive (6)
HR (20)
Intelligence (6)

- project renders a project activity line for the project specified by the tag's name attribute. Use the display attribute to specify a display name for the project (other than the project's display name, which is printed by default).
- currentproject renders the name of the current project. If the sections attribute is not set to
 "false", the project's newspage sections will be listed; likewise, if the labels attribute is not set to
 "false", the label activity listing will be displayed for the project (listing the labels defined in the
 project and how many articles with that label are present in the current time slice). Here is an
 example of the rendering for the currentproject tag in the Mexico skin.

Executive Sections Headlines Status Reports Meeting Notes Issues To Do Questions To Do Recent Articles Bulletins Recent To Do Recently Done Labels bulletin done (1) FAQ FYI headline (2) issue meeting (1) question status (1) to do (1)

toc - renders a project's Table of Contents. The top-level items are the ones listed in Project Setup



> Newspage > Navigation Links > Root Articles. Underneath these are the children of each of the root articles, and then the children's children, and so on. The <toc/> syntax will render a title Contents followed by the links. To customize the title use this syntax <toc title="Table of Contents"/>

Table of Contents □ TeamPage RDB Documentation System Requirements Migrating Existing TeamPage Journals Creating a New Journal Rebuilding Journals Database Administration

- label renders a label activity line for the label specified by the tag's name attribute. Use the display attribute to specify a display name for the label (other than the label name).
- group renders a hierarchical group heading for a list of labels, taking the heading text from the name attribute. Usually, this tag will have any number of instances of the label tag and other instances of the group tag itself as children. Here is an example how to use the group tag and the label tag to create a hierarchical display of a set of labels:<group name="Computing">

```
<group name="Technologies">
<label name=":computing:hardware" display="Hardware" />
<label name=":computing:software" display="Software" />
<label name=":computing:programming" display="Programming" />
<label name=":computing:robotics" display="Robotics" />
<label name=":computing:security" display="Security" />
</aroup>
<group name="Types of Software">
<label name=":computing:software:audio" display="Audio" />
<label name=":computing:software:browsers" display="Web Browsers" />
<label name=":computing:software:email" display="Email" />
<label name=":computing:software:graphics" display="Graphics" />
<label name=":computing:software:os" display="Operating Systems" />
</group>
<group name="Standards">
<label name=":computing:standards:css" display="CSS" />
<label name=":computing:standards:dom" display="DOM" />
<label name=":computing:standards:html" display="HTML" />
<label name=":computing:standards:http" display="HTTP" />
<label name=":computing:standards:xml" display="XML" />
</group>
</group>
```

And here is what this might look like in the Mexico skin:



```
Computing
Technologies
 Hardware (1)
 Software
 Programming
 Robotics
 Security (1)
Types of Software
 Audio
 Web Browsers (34)
 Email
 Graphics
 Operating Systems
Standards
 CSS
 DOM
 HTML
 HTTP
 XML
```

• labelgroup - has the same effect as a group tag with label tag children for all labels in the current project whose names start with a given prefix, specified by the prefix attribute. Here is an example of how to use the labelgroup tag to show a hierarchical listing of the labels whose names begin with the prefix "bug:":

```
<group name="Bugs">
<group name="General">
<label name=":bug" display="bug"/><labelgroup prefix="bug:" />
<label name=":duplicate"/>
</group>
<!-- ... -->
</group>
```

And here is what this might look like in the Mexico skin:



```
Bugs
General
bug (1245)
believed fixed (51)
duplicate (54)
fixed (525)
mischaracterized (2)
not (62)
OBE (12)
unreproducible (118)
Vendor (3)
verified (25)
duplicate (62)
```

- remaininglabels renders a standard label activity listing for any labels whose activity has not already been displayed manually with an instance of the label tag.
- onthispage renders the "On This Page" block for the current view, which is a list of the labels appearing in the view. Next to each label is a number in parenthesis representing the number of occurrences of the label. Here is an example of the rendering for the onthispage tag in the Mexico skin.

On This Page
headline (2)
:Engineering:bulletin (1)
:Engineering:headline (1)
:HR:policy (1)

- sdl evaluates an SDL template or function. The template or function to be evaluated is specified in standard SDL template specification syntax using the tag's template attribute, e.g., <sdl template="com.traction.sdl.lib.elements#somefunction" />.
- link renders a link to the URL specified by the href attribute. The optional description attribute may be specified to indicate the text to be used for the title tip. The value of the name attribute is used as the link text. For example, this links to www.tractionsoftware.com: <link href="http://www.tractionsoftware.com/" description ="Open Traction Software Website" name="Traction Software"/>
- rslink renders a link to the Traction view or resource referenced by the rapid selector expression specified in the rs attribute. The rsattribute should include your rapid expression. The value of the name attribute is used as the link text. The optional descriptionattribute may be specified to indicate the text to be used for the title tip, and the display title of the target page (when applicable). e.g. To link to a section, you would use: <rslink rs="/section MyProj\$todo" name="Recent To Do" description="Recent To Do Items in My Project" />

Front Page Sections



Doc586: December 31, 2008 10:15 AM, Posted by Paul Needham, Edited by Jordan Frank

Traction's "Front Page" is an easily configured dashboard view that looks across all projects which the user can see. Sections on the Front Page determine what content to show and how to display it.

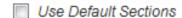
The Front Page is modeled on the front page of a newspaper, where you find headlines and items selected from the various newspaper sections, such as Business, Sports, etc.

In Traction, the Front Page normally has multiple *sections* that dynamically collect and display items from the projects that a given user has read rights to. See Sections Overview for more detailed information on the section settings.

A person with Server Administrator permissions can click the *Front Page* tab in *Server Setup* to access an *Edit Section* form specifically for the Front Page. When a Traction TeamPage server is first installed, the Front Page is set to use default settings for the sections. To customize the the Front Page sections, you can uncheck the *Use Default Sections* checkbox, at which point the *Edit Section* form will be shown to allow modifications to be made.

Frontpage Sections

You can customize Traction so that the sections you choose appear on your Frontpage.



Many of the sections on the Front Page are used to collect together articles from multiple projects. The wildcard, *, is used to denote "all projects," so, for instance, when you look at a section with a Type of Label for headlines in all projects, the label syntax is "::*:headline."

Tip: If you have projects that you do not want Front Page sections to display articles from, you can use an expression in the *Search* box to filter out those projects. For instance, to exclude a project "Test" from a section with a Type of Recent Articles, you can enter an expression such as "(NOT ::Test)" and articles from the Test project will not appear in that section. If you are careful about how you name your projects, you can use the * wildcard to exclude groups of projects, such as several documentation projects that you named starting with "Docs." In this case, you could use an expression like: "NOT (::Docs* OR ::Test)" to exclude all documentation projects plus the Test project.

Note: All projects included in a section Search expression should be configured to provide Access permissions to the Everyone Group. Currently, if a user without access to one or more of the included projects views a page containing the section, the expression will not evaluate correctly and will fail to act as a filter on the section content.

Frontpage Name

Doc121: March 22, 2008 4:03 PM, Posted by Documentation Importer

Server administrators who prefer an alternative to the default frontpage name of "Front Page" can use this setting to choose a new name to their liking.



Frontpage Name

The name for the front page. If left blank, the localized resource that corresponds to **Front Page** will be used.

CIHo	me
\square υ	se the default value (none specified)

The name you choose will appear in the locator (or "bread-crumb trail") navigation section at the top of most standard Traction skins. Here's an example of what a custom frontpage name looks like in the Mexico skin:



CI Home > All Projects	> Chronology
Projects	All Projects » Recent Articles Recent Comments All Recent
Engineering (19)	
Executive (3) HR (8) Intelligence (5)	All Projects Chronology

Frontpage Title

Doc123: March 22, 2008 4:03 PM, Posted by Documentation Importer

Server administrators who prefer an alternative to the default frontpage title of "Front Page" can use this setting to choose a new title to their liking.

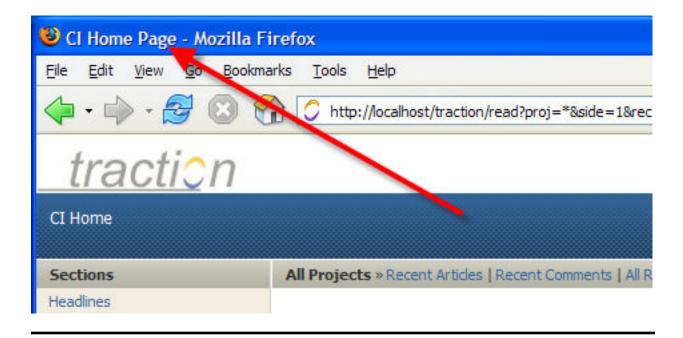
Frontpage Title

The title that is used as the HTML title, typically shown as the browser window title, for the front page. If left blank, the localized resource that corresponds to **Front Page** will be used.

CI Home Page	
Use the default value (none specified)	

The value entered here is used for the HTML TITLE element for the frontpage in standard Traction skins.





Frontpage Navigation Links

Doc122: March 22, 2008 4:03 PM, Posted by Documentation Importer

As of version 3.7, Traction supports customizing the left-hand navigation panel that appears in the Mexico, Ocean, and Earth skins using an XML template that specifies the hierarchy and positioning of navigation elements.

These two frontpage settings allow a server administrator to indicate whether to use the XML-driven customized navigation interface for frontpage views (and other multiple project views), and what XML to use. (This can also be done for project newspages and other single project views; see Project Navigation Links.)



Navigation Links

Override default navigation with content specified below in XML? Default (no) This setting allows you to activate and deactive the override of the default navigation for certain skins using an authored XML fragment specified below. **Navigation Links XML Template** If enabled above and supported by the skin, the normal navigational elements usually displayed in the left column will be controlled instead by this XML fragment. Use Default Value <navlinks> <sections/> cts/> </navlinks>

For an explanation of the Navigation Links XML syntax, see Project Navigation Links.

Server Setup - Journal

Doc254: March 22, 2008 4:17 PM, Posted by Documentation Importer

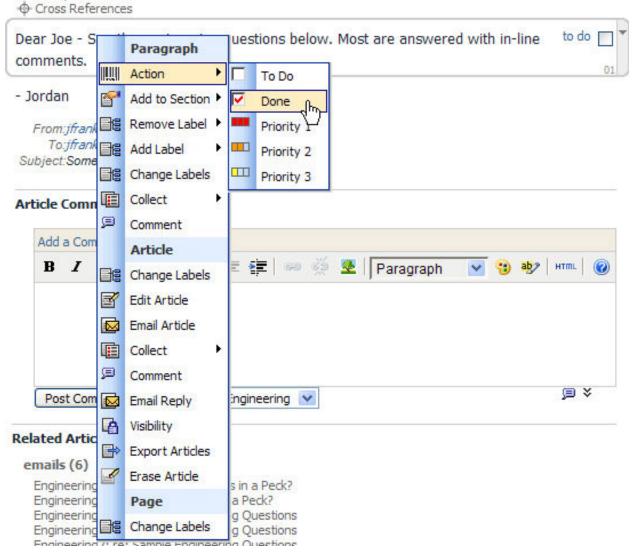
This page allows you to customize the Actions that appear in the Context Menu. Actions are like macros that can add and remove labels with a single click.

In the example below, the *Done* action is being selected. By default, the *Done* action removes any *to do* labels on an item and adds the *done* labels from corresponding project or projects.



Some Engineering Questions

Engineering71 | August 30, 2006 | 11:12:32 PM EDT Posted by admin



Note: In the special case of the *To Do* and *Done* actions, most Traction skins provide a checkbox that lets you invoke the action that would be required to toggle the current state. If a *to do* label appears, the checkbox will show as blank and will trigger the *Done* action; if the *done* label appears, the checkbox will show as checked and will trigger the *To Do* action. If both *To Do* and *Done* labels appear, the checkbox will appear with a grey check and will trigger the *To Do* action.

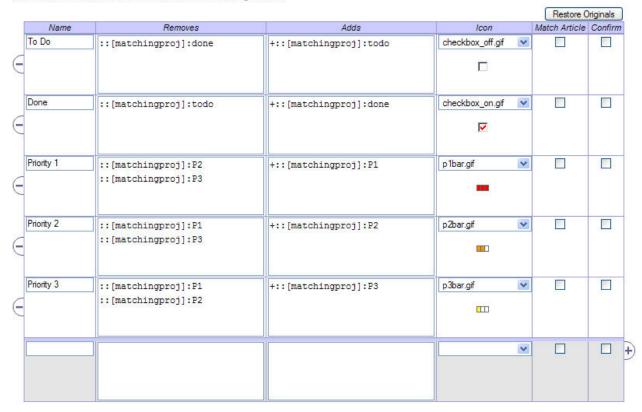
Overview of the Custom Label Action Editor

This form lets you define actions.



Custom Label Actions

Use the control below to add new actions or edit existing actions.



You can *name* each action and assign it an *icon*, which will appear in the context menu. Each action can be defined to *remove* a set of labels and *add* a set of labels. Normally actions take effect immediately. If you want the user to be required to preview the effect of an action in a *Change Labels* dialog before submitting, you can click the action's *Confirm* checkbox.

In the examples above, two sets of actions are defined:

- To Do and Done switch between the corresponding labels.
- Priority 1, Priority 2, and Priority 3 switch between these three priorities.

matchingproj

You'll notice that in the above example, all the actions are specified with a *matchingproj* project qualifier. This means that when the action is evaluated, for each project in which a matching label is found in the remove column, a label from the matching project should be added.

For example, the following paragraph is labeled *P1* in two projects:

Dear Joe - See the engineering questions below. Most are answered with	to do [
in-line comments.		
III-line comments.	:Intelligence:P1	



When the *Priority 2* action is invoked, both labels are converted to *P2* in the matching, or corresponding, projects:

Dear Joe - See the engineering questions below. Most are answered with
P2
in-line comments.

to do
P2
:Intelligence:P2

Match Entry

This is a special-purpose option and is very seldom useful. It works like this: when a specific label, such as *to do* is present on the title and you perform an Action such as *Done* on a *different* paragraph, the *to do* labels will be removed from both the title and the paragraph on which the action was triggered, but the *done* label will only be placed on the paragraph.

Adding a New Action

Let's add a new action called *Make Alert* that adds the *Alert* label from the Intelligence project and removes any headline or news labels. To define a new action, we must add a row that specifies the parameters of the action.

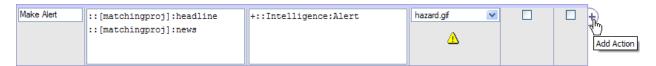
Syntax for Adds and Removes

Adds and removes are specified with the following syntax:

- 1.

 An optional "+" before the label defines the behavior if the label has not already been created in the project. If the "+" is present, the action will have the side-effect of creating the label. If the "+" is not present, the action will not add the label. In most cases you want the "+".
- 2.
- The name of a project or the special qualifier "[matchingproj]"
- 4.
- 5. The name of a label

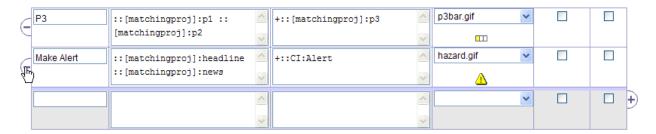
Here's the action definition corresponding to our example.



In this case, we name the action *Make Alert*. In the *Removes* column, we use matchingproj to remove any existing *headline* or *news* labels. In the *Adds* column, we use the [matchingproj] qualifier to make sure all other headline and news labels are removed. When choosing icons, you can select the field and use the up and down arrows to change the selection; during this process the icon is previewed underneath. You can also Upload an Icon your own icons and Delete an Icon icons from the list.

Note: In order to add this action to the list of actions, we must press the +). The action then appears in the list. If you just press *Apply* without clicking +) your definition will be discarded.

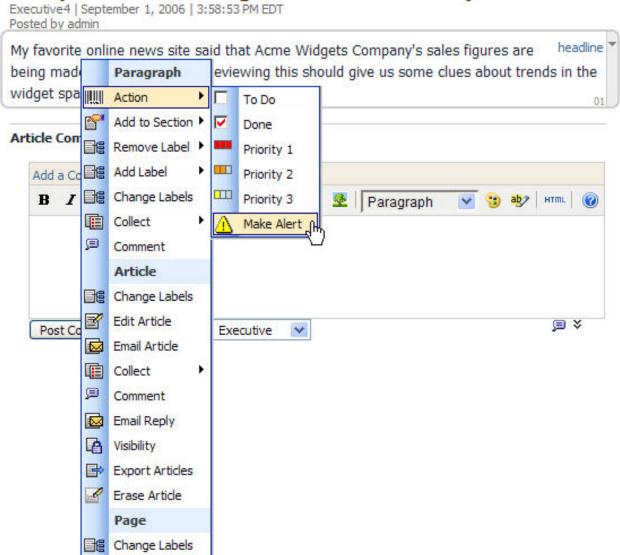




After adding or changing action, you must press Apply for the changes to take place.

After pressing Apply, our action appears in the context menu:

Competitors' Sales Figures Available Today



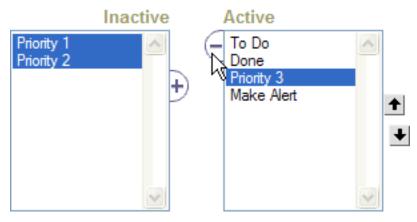


When we click on the action, the label on the paragraph instantly changes.

My favorite online news site said that Acme Widgets Company's sales :Intelligence:Alert figures are being made public tomorrow. Reviewing this should give us some clues about trends in the widget space.

Controlling the Set and Order of Actions in the Default Context Menu

The actions listed in the *Active* list are the actions that all users see by default, and the order they appear in this list is the order they will appear in the default context menu. Individual users can change the set of actions and the *order* of the actions listed in *their* context menu using the Personal Preferences control.



To make an action inactive, select it and click the (- button. You can select inactive actions and click the +) button to make them active. You can reorder the actions in the Active list by selecting one or more actions and clicking the up and down arrows to shift their positions.

Don't forget to click the Apply button to save any changes you make.

Custom Label Actions

Doc54: March 22, 2008 3:52 PM, Posted by Documentation Importer

You can rearrange the set of label actions that appear in your context menu. The default set of *Label Actions* is defined by Server Administrators on the page Server Setup - Journal. You can include actions that are not normally included, exclude those that are, and change the order in which the actions you include are listed.

Normally the default actions are selected:



Custom Label Actions

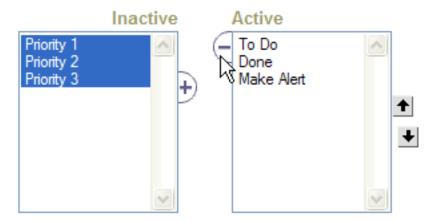
The Active actions will appear in the Action submenu of the Traction Context Menu.

Use Default Actions - uncheck this if you wish to override the selection of actions specified for this server.



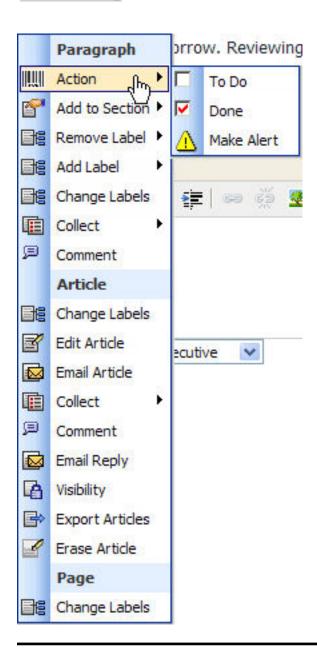
If you wish to change this, you can select Active actions and click (- to make them inactive and use the up and down arrows to rearrange them. You can also make inactive actions active and place them where you like.

For example, by setting the labels actions to this:



After you click the *Apply* button to save your changes, the context menu's Action submenu will reflect the contents of the "Active" list:





Upload an Icon

Doc309: March 22, 2008 4:24 PM, Posted by Documentation Importer



Upload an Icon

If you upload an icon with the same name as an icon that already exists, the old icon will be replaced. It is recommended that you use icons that are 16 x 16 pixels.



To upload an icon, click Browse to locate the icon file, then click the +) button to perform the upload.

Once an icon has been uploaded, it can be assigned to any action.

Delete an Icon

Doc65: March 22, 2008 3:54 PM, Posted by Documentation Importer

Delete an Icon



You can delete the icon whose filename is listed in this control by clicking the (- button. The currently selected icon is previewed to the right of the control.

Deleting standard icons is not recommended.

About Plug-ins

Doc2: March 22, 2008 3:44 PM, Posted by Documentation Importer, Edited by Christopher Nuzum

Version 3.7.3 of Traction introduced support for easily bundled and shared plug-in modules. "Plugins" extend the functionality of the Traction system by adding additional Java or SDL extensions to Traction. Administrators can install and maintain plugins using the web interface. Plugins can be configured using the web interface, and may optionally expose settings that project administrators or users can customize for their own needs.

Configure Plugins

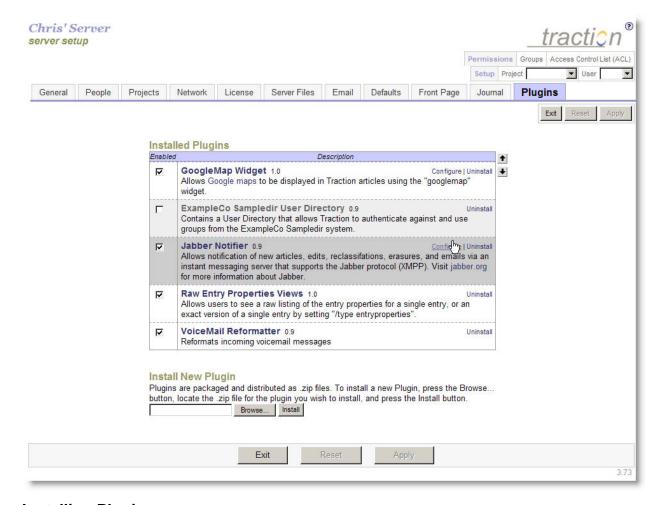
Doc39: March 22, 2008 3:49 PM, Posted by Documentation Importer

Configuring Plugins

Server Setup

On the Server Setup | Plugins tab administrators can install, activate and deactivate plugins, rearrange, and configure plugins.



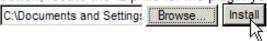


Installing Plugins

Traction plugins are delivered as .zip files. To install a new plugin or to upgrade an existing plugin, click the browse button, locate the .zip file, and press the install button.

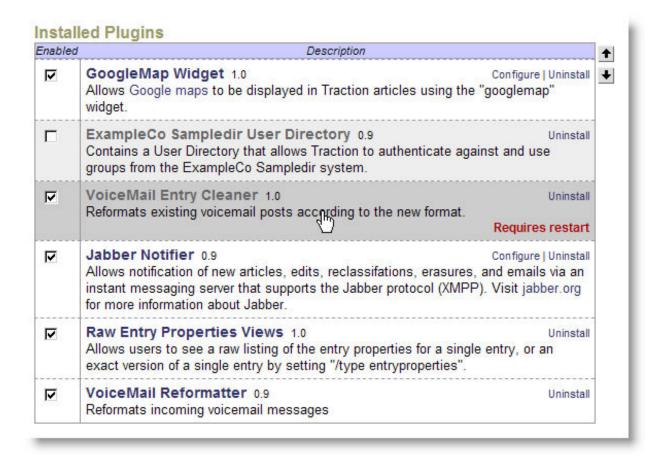
Install New Plugin

Plugins are packaged and distributed as .zip files. To install a new Plugin, press the Browse... button, locate the .zip file for the plugin you wish to install, and press the Install button.



The plugin will be added to the list. If the plugin includes Java classes or libraries, it will be flagged as "requires restart"; you need to restart Traction before the plugin's functionality will be available.





Reordering Plugins

In some cases, plugins may depend on each other and you may need to make sure that they appear in an order described by the provider of the plugin. To reorder the plugins, select a plugin by clicking its description and using the arrows to move the selected plugin up and down.



nable	d Description
굣	GoogleMap Widget 1.0 Configure Uninstal Allows Google maps to be displayed in Traction articles using the "googlemap" widget.
	ExampleCo Sampledir User Directory 0.9 Uninsta Contains a User Directory that allows Traction to authenticate against and use groups from the ExampleCo Sampledir system.
┍	VoiceMail Reformatter 0.9 Uninsta Reformats incoming voicemail messages
哮	VoiceMail Entry Cleaner 1.0 Reformats existing voicemail posts according to the new format.
ᅜ	Jabber Notifier 0.9 Configure Uninstal Allows notification of new articles, edits, reclassifations, erasures, and emails via an instant messaging server that supports the Jabber protocol (XMPP). Visit jabber.org for more information about Jabber.
V	Raw Entry Properties Views 1.0 Uninsta Allows users to see a raw listing of the entry properties for a single entry, or an exact version of a single entry by setting "/type entryproperties".

To apply changes, press the apply button at the bottom of the page. In rare cases when Java libraries or class files depend on a specific ordering, you may also need to restart Traction before the plugins will operate as designed.

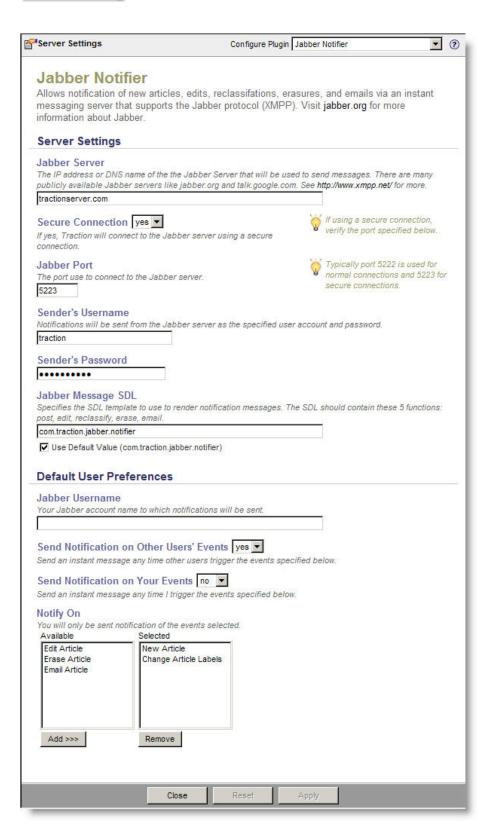
Configuring Plugins

Plugins may provide server, project, and user settings. Default project and user settings can be provided by the server administrator. To configure a plugin, press the configure link to the right of its description.



The plugin's settings editor will appear.

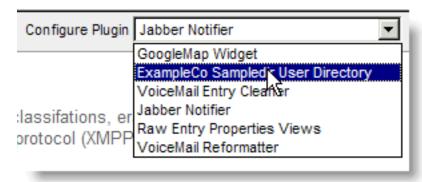






This plugin includes server settings and user settings. You can fill in the requested information and press apply to save the changes.

You can also switch between plugins using the setting editor.



Also see how to Plugins.

Using the TeamPage Feed Reader

Doc361: April 29, 2008 11:40 AM, Posted by Christopher Nuzum, Edited by Jordan Frank

TeamPage Feed Reader is an option you can purchase which will publish external feeds into your Traction TeamPage server. It is not to be confused with RSS Feeds which are published automatically from the Traction TeamPage Server.

- About RSS Ingestion
- Launching the Feed Manager
- Adding a Feed
- Editing a Feed
- Previewing a Feed
- Changing the Default Polling Interval
- Troubleshooting