

Configure main settings

 Has to be revisited

 Specified, but no longer a priority, has to be revisited in light of latest chgs.

Story

Magnolia is easy to set up and configure through a special panel, from which I can access most static settings. I can see a small group of main topics, which in turn contain smaller setting units such as messaging or performance. Each setting unit uses one or several forms to set up one or several components associated with the unit.

I also have a favorites section at my disposal. I can mark setting units as favorites and then access them more easily and quickly through this section. In addition, I can also use a search box to search for a particular setting. Search works so well that I can find names used in a main topic, a setting unit or an individual setting - clicking on a result takes me to the corresponding form.

Description of desired behavior

The Setup panel

The Setup panel replaces the JCR browser to the "config" JCR workspace as the only means to configure Magnolia. It assembles settings, which are configured mainly during initial setup, for a migration or during maintenance. The overall nature of such settings is static and technical. By contrast, security settings and template definitions have panels of their own, which have to be changed more frequently and/or belong to the core competence of a CMS.

Settings are grouped into four **setting topics**:

- *Content Authoring*: definitions of processes and workflows, setup of content aggregators
- *User Interface*: overall configuration of AdminCentral, interface appearance and user experience
- *Infrastructure*: all technical aspects such as performance settings, messaging definitions and the chaining of instances
- *Other*: left for additional settings not clearly belonging to one of the above topics

Topics in turn contain **setting units**, which are comprised of a number of settings belonging together and configuring a single element, which may be a component or (Magnolia) module. Examples are "activation" for the definition of subscribers and their subscriptions, but also for providing a single switch to turn activation on or off, or "performance" for setting up the cache and its policy. A setting unit may then use any of the available forms such as the [single-page complex form](#) to further structure their settings.

Modules may add setting units and locate them under any of the available setting topics, but may not add any topics of their own. No mechanism exists for a module to add an individual setting to an existing setting group.

If a setting unit receives the **focus**, it highlights and a **description explaining the purpose of the unit** is shown. This is similar to how [field descriptions are handled in a form](#) - note however that in contrast to the latter, descriptions of setting units **are not optional**. In particular, they may not be replaced by a simple help page.

Notifications

If problems exist in one of the settings units due to missing or inaccurate values, the setup panel may emit notifications to inform the user.

In particular, right **after the initial setup stage** of Magnolia, any missing values which should be filled in, such as the *default base URL* or *mail settings*, will cause a [system warning message to be shown](#). This message may be acknowledged and ends up in the [list of system messages](#).

To ensure that such warnings are not lost in the stream of messages, the [tab of the settings & tools work area](#) as well as the menu entry leading to the setup panel shall both show a message light and labels. This is equal to how [personal messages are treated](#) by AdminCentral's main menu.

A **settings unit itself also shows the warning** using visual indicators such as a warning icon and background colors. This, in turn, is similar to [how the vertical tabs of a single-page complex form show validation messages](#).

A user thus sees there's an issue in settings & tools, clicks its tab, sees that there's a warning in the setup panel, selects it and then immediately realizes which of the settings units are affected. Actual warning or error messages on the subsequent forms are presented using the [mechanisms for showing form validation messages](#).

Search for settings

A user may also use the search box to search for settings. A search is performed on all settings topics and units as well as all strings used in forms making up the units. Clicking on a result takes you to the corresponding match according to the following list:

- match is a settings topic: opens the setup panel, puts the **focus** on the first unit in the topic
- match is a settings unit: opens the setup panel, sets the focus on the unit
- match is a string in a form inside a unit: opens the setup panel, then opens the settings unit which shows the form, chooses the vertical tab where the string was found

The last matching is demanding in that strings in forms have to be properly mapped to the tabs and the settings unit showing them. *Alternatively, matching a string inside a form could also just act like a match of a settings unit:* the setup panel is opened and the focus is set on the unit showing the form containing the string that matched.

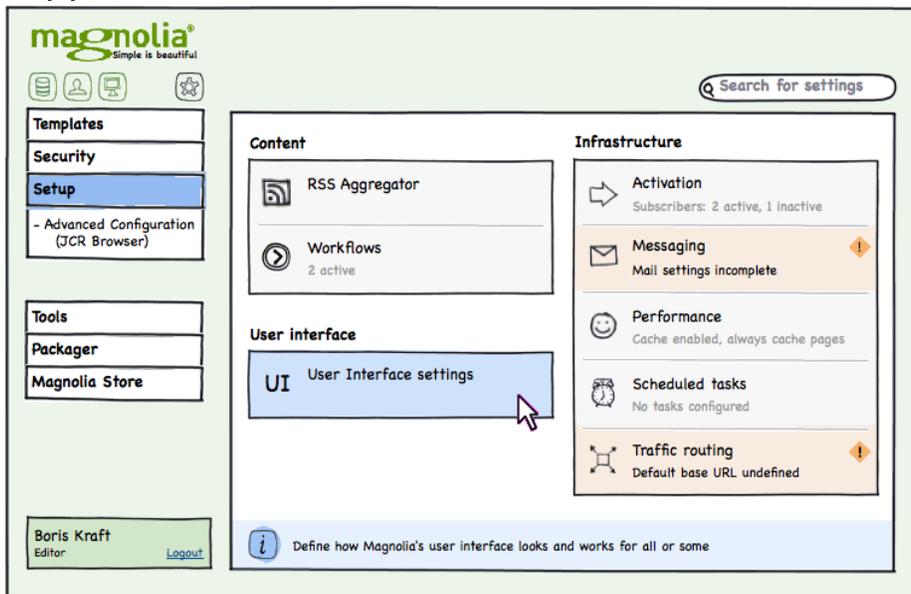
Advanced configuration using the JCR browser

Previously, configuring Magnolia was only possible by using a JCR browser to edit nodes directly. The goal of the Setup panel is to make setup and maintenance of Magnolia easier. For the panel, we pick out configuration topics, which are common during these two stages, and cover them with specific, tailored user interfaces to make them easier to handle. Both configuration options (browser and panel) will be supported in Magnolia 5, but the browser should become the choice for advanced configuration tasks only.

The menu item opening the Setup panel shall thus expose a sub item for opening the JCR browser. This will offer a user with the proper access right the familiar interface known from previous versions of Magnolia containing the two root nodes "server" and "modules".

Mockups

Setup panel



- Good**
- provides settings overview
 - layout references vertical tabs of forms (less to learn)
 - layout resembles typical control panel layouts
 - simple to layout, scales indefinitely
 - icons help to look for a particular topic
- Bad**
- could be visually a bit less loud
- Note**
- Groups are intentionally misbalanced. They can't be properly balanced, so may as well use them to bundle more technical (right) and less technical (left) groups.

Control

- panels, favorites, notifications

Notifications

Warnings on problems with settings

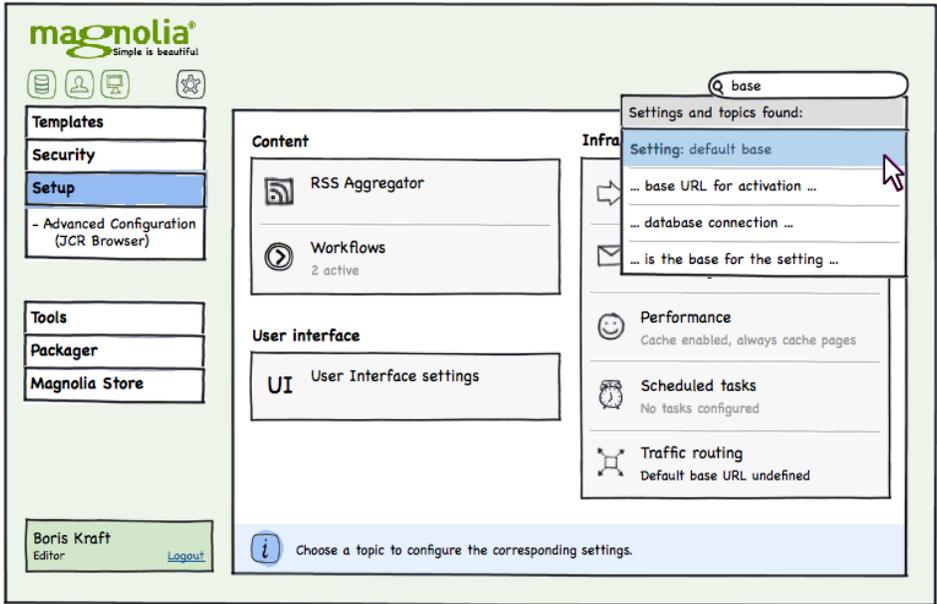
The screenshot shows the Magnolia administration interface. At the top left is the Magnolia logo with the tagline "Simple is beautiful". Below the logo are icons for home, user, and help. A search bar labeled "Search for settings" is at the top right. On the left side, there is a navigation menu with categories: Templates, Security, Setup (highlighted in blue with a yellow badge indicating "2 warnings"), - Advanced Configuration (JCR Browser), Tools, Packager, and Magnolia Store. At the bottom left, the user "Boris Kraft" is logged in as "Editor" with a "Logout" link. The main content area is divided into several sections: "Content" with "RSS Aggregator" and "Workflows (2 active)"; "User interface" with "UI User Interface settings"; "Instance" with "Activation (Subscribers: 2 active, 1 inactive)", "Performance (Cache enabled, always cache pages)", and "Traffic routing (Default base URL undefined) with a warning icon"; and "Infrastructure" with "Messaging (Mail settings incomplete) with a warning icon" and "Scheduled tasks (No tasks configured)".

Notification at end of setup

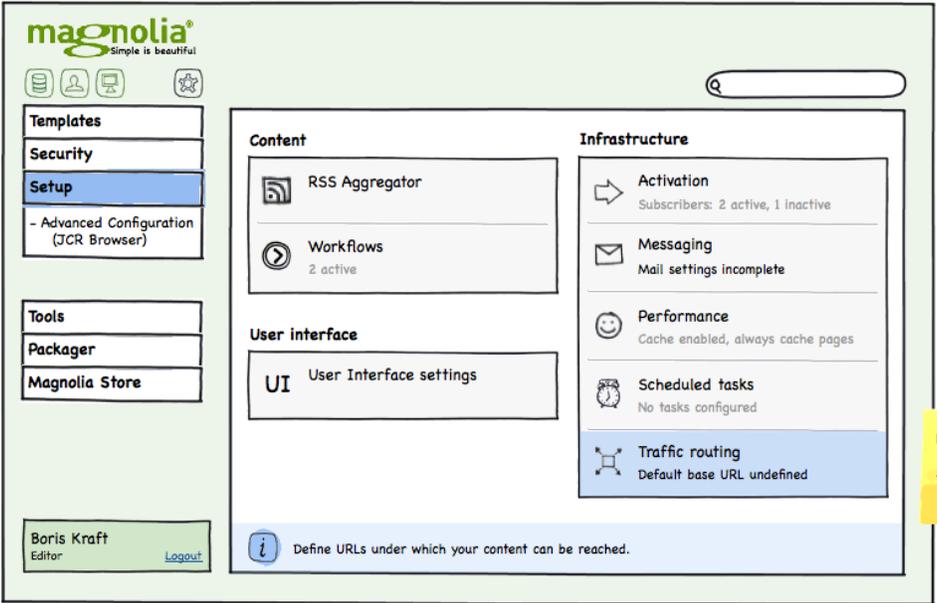
The notification box is yellow and contains the following text: "Conclude setup of this Magnolia instance" followed by a close button (X). Below this, it says "The following steps are still missing to finalize the set up of this instance:" and lists two bullet points: "• [Set the default base URI](#)" and "• [Specify the mail server settings](#)". A mouse cursor is pointing at the second link.

A simple rectangular box containing the text "Control" on the top line and "- notifications" on the bottom line.

Search for settings



Search for settings
- search results and focus on match



Hitting ENTER now takes you into the Traffic routing unit

The above mockup demonstrates a simple search implementation, which marks settings units even in the case a string inside their form matches. An advanced implementation would even open the form and switch to the tab containing the string.

Advanced configuration



Search for settings

- Templates
- Security
- Setup
 - Advanced Configuration (JCR Browser)

- Tools
- Packager
- Magnolia Store

Boris Kraft
Editor [Logout](#)

	Page name	Value	Type	Last modified	Status
<input type="checkbox"/>	server			Aug 2, 2010	●
<input type="checkbox"/>	modules			Aug 3, 2010	●
<input type="checkbox"/>	core			Aug 2, 2010	●
<input type="checkbox"/>	fix-preload-awt			Sep 30, 2010	●
<input type="checkbox"/>	exchange-simple			Sep 21, 2010	●
<input type="checkbox"/>	form			Sep 30, 2010	●
<input type="checkbox"/>	imaging			Jul 17, 2010	●
<input type="checkbox"/>	templating			Jun 3, 2010	●
<input type="checkbox"/>	adminInterface			Nov 18, 2010	●
<input type="checkbox"/>	cache			Nov 18, 2010	●
<input type="checkbox"/>	exchange-transactional			Nov 10, 2010	●
<input type="checkbox"/>	advanced-cache			Nov 7, 2010	●
<input type="checkbox"/>	content-translation-support			Oct 27, 2010	●
<input type="checkbox"/>	fckEditor			Nov 9, 2010	●

Search is visible,
but disabled

Advanced
- JCR browser shows