



Sitecore Poll Module Administrator Guide

Installation and configuration advice for administrators and developers

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Chapter 1

Introduction

This document contains important hint and tips for developers that use the Poll Module. In it you will learn how to properly install the module, and also get to know important features of it.

This manual contains the following chapters:

- **Chapter 1, Introduction**
The first chapter is a brief introduction to this manual.
- **Chapter 2, Installation**
The second chapter covers useful installation aspects.
- **Chapter 3, Using Polls**
The third chapter delivers a brief overview of the Poll module's functionality and its features.
- **Chapter 4, Developer Hints**
The fourth chapter provides more 'insider' information about the Poll Module for developers and system architects.

Chapter 2

Installation Guide

The Poll Module is distributed as a standard Sitecore package. In order to start using it, you should install the package via the Sitecore desktop link *Sitecore » Development Tools » Installation Wizard*. The following sections describe the installation process in detail.

The Sitecore Poll Module is designed for Sitecore CMS starting from version 6.0.0 and higher. It can be installed both on Sitecore Starter Kit and on a clean Sitecore solution.

Note

For the module to work, it is not required to restart the Sitecore client after the installation.

2.1 Installing Poll Module

The Poll Module is installed with the Sitecore Installation Wizard available via the Sitecore desktop link *Sitecore » Development Tools » Installation Wizard*. The following sections will guide you through the package installation process.

2.1.1 Upload the Package

- Select the Upload button to open the Upload Wizard.
- Select the Browse button on the Select Files step and locate the Poll package on your local machine.
- Select the Open button on the Choose File dialog when you have selected the Poll package.
- Select the “Next »” button on the Select Files step.
- Select the “Next »” button again, on the Overwrite Existing Files step.
- Select the “Finish” button to close the Upload Wizard.

2.1.2 Install the Package

- Select the “Next »” button on the Specify Package step.
- Read the Shared Source License and select the “I accept the terms of the license agreement” radio button.
- Select the “Next »” button on the License Agreement step.
- Read the Readme information.
- Select the “Next »” button on the Readme step.
The Installation Wizard now displays the *Ready to Install* step, which shows the revision of the Poll package you will install.
- Select the “Install” button to begin the installation.

Choose “Overwrite All” for files when prompted.

It is not required to restart the Sitecore client after the installation for the module to work.

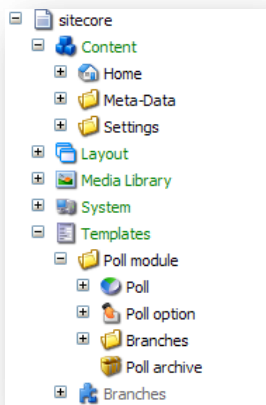
2.1.3 Templates, Controls, Accounts and Features Available after Installation

The Poll module package installation adds a number of templates and controls to your Sitecore solution.

The following templates are installed in the `/Templates/Poll Module` folder:

- **Poll** – the template used to create poll Items.
- **Poll option** - the template used to create items that contain poll options.
- **Poll archive** - the template used to store older polls.
- **Branches/Create new Poll** - a branch template that is used to run a wizard that creates a new poll.

You can see these templates in the following image:



The following web controls are installed:

- **Poll Wizard**- a wizard that helps to create a poll
- **Poll Info** – a viewer for poll items
- **Poll Voting Sublayout**- a sublayout to render backend pages

Apart from that, installation adds a new account to the Sitecore Security - sitecore/poll. This account is used for communicating with the Sitecore web service. You must not delete it, disable or change its password. This account can access only the required poll items. The account access rights must not be changed, either.

If you are using servers with staging scenario implemented, you must change the reference to the server which contains the master database. This setting is stored in the `/App_Config/Include/PollConfig.config` file, in the `"Poll.StagingMasterUrl"` setting.

Chapter 3

Using Poll Module

This chapter describes how to configure and use the Poll module.

The chapter includes the following sections:

- Creating a New Poll
- Managing Existing Polls
- Archiving Polls

3.1 Creating a New Poll

Polls can be created in two different ways:

1. **Using the Page Editor** - the Page Editor enables you to place a poll on a certain spot on a page and to manage it. Recommended for users with basic knowledge of Sitecore.
2. **Using the Content Editor** – the Content Editor provides all poll creation and management options, such as closing the poll, etc.

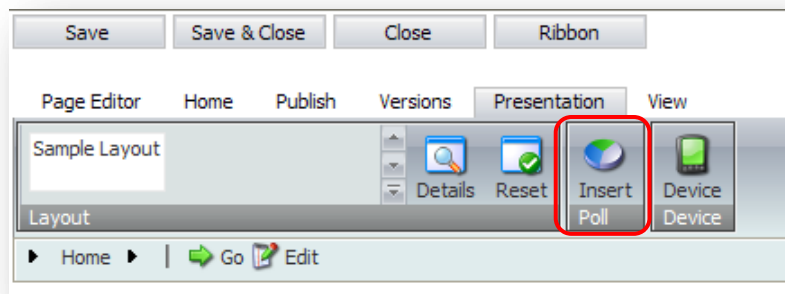
3.1.1 Creating a New Poll Using Page Editor

Follow the next steps to create a poll using the Page Editor.

1. Log in to your web site in the Page Editor mode.
2. Navigate to page where a poll needs to be placed.
3. Click the **Edit** button and then click the **Ribbon** button to make the ribbon visible.



4. Select the **Presentation** tab. The **Insert** button is available in the Poll chunk.

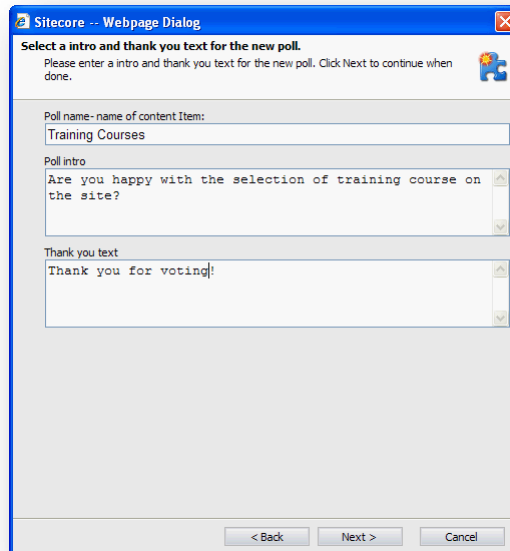


5. Click the **Insert** button to launch the Poll Wizard.

3.1.2 Poll Wizard

The Poll Wizard simplifies the process of creating a poll and filling its properties. It contains the following steps.

1. Specify the poll question.


 A screenshot of the 'Sitecore -- Webpage Dialog' window. The title bar says 'Sitecore -- Webpage Dialog'. The main content area is titled 'Select a intro and thank you text for the new poll.' and includes instructions: 'Please enter a intro and thank you text for the new poll. Click Next to continue when done.' There are three text input fields: 'Poll name- name of content Item:' with the value 'Training Courses', 'Poll intro' with the text 'Are you happy with the selection of training course on the site?', and 'Thank you text' with the text 'Thank you for voting!'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

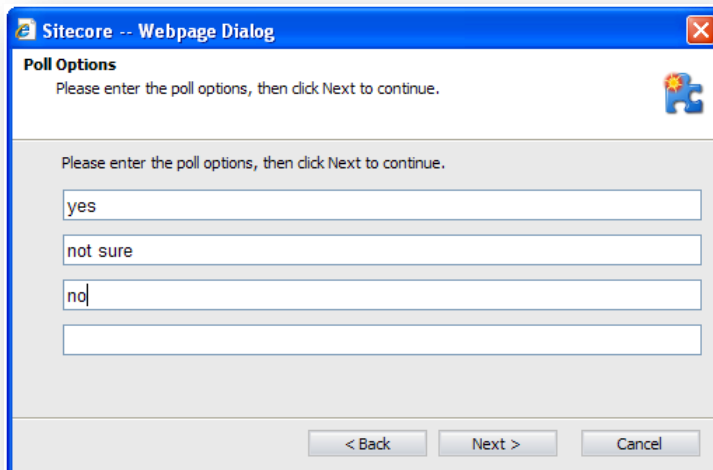
The **Poll name** field defines the Item name in the Content Tree.

The **Poll intro text** (the question of the poll) is shown above the poll options. This field can contain HTML tags.

The **Thank you text** appears after a site visitor places his or her vote. This field can also contain HTML tags.

Click the Next button when finished.

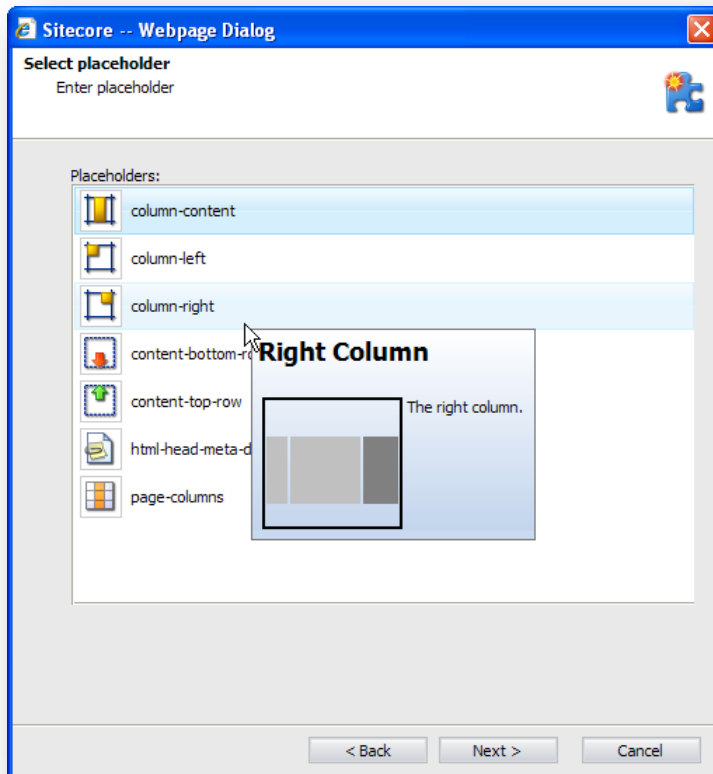
2. Add poll options.



The screenshot shows the 'Poll Options' dialog box in Sitecore. The title bar reads 'Sitecore -- Webpage Dialog'. The main heading is 'Poll Options' with a sub-instruction: 'Please enter the poll options, then click Next to continue.' Below this, there are four text input fields. The first three contain the text 'yes', 'not sure', and 'no' respectively. The fourth field is empty. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Note: even if you leave out the middle option, the rest of the options will appear on the site. Click Next to continue.

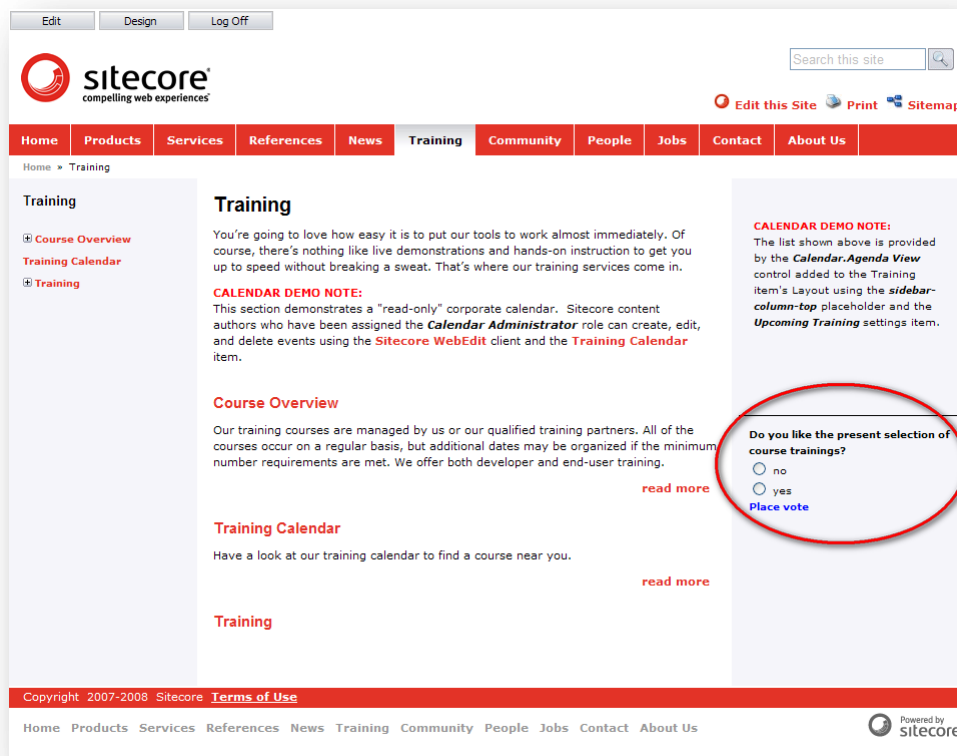
3. Choose the placeholder for the poll.
Move the pointer over a placeholder in this window to see where exactly the poll will be placed.



The screenshot shows the 'Select placeholder' dialog box in Sitecore. The title bar reads 'Sitecore -- Webpage Dialog'. The main heading is 'Select placeholder' with a sub-instruction: 'Enter placeholder'. Below this, there is a list of placeholders on the left: 'column-content', 'column-left', 'column-right', 'content-bottom-row', 'content-top-row', 'html-head-meta-d', and 'page-columns'. The 'column-right' placeholder is selected. To the right of the list, a preview window shows a diagram of a page layout with three columns. The rightmost column is highlighted and labeled 'Right Column' with the text 'The right column.' below it. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Click Next to finish the poll creation.

See how it looks on the front-end:



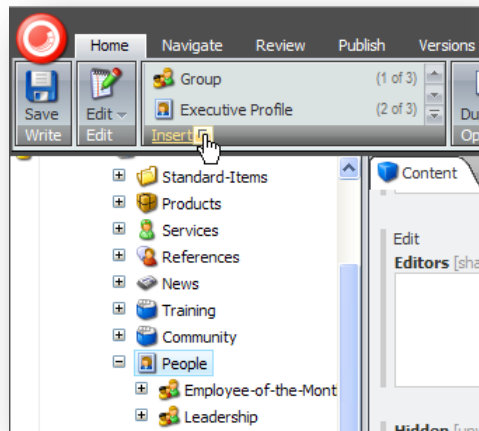
3.1.3 Creating a New Poll Using the Content Editor

Creating a poll using the Content Editor gives you the following advantages over the Page Editor:

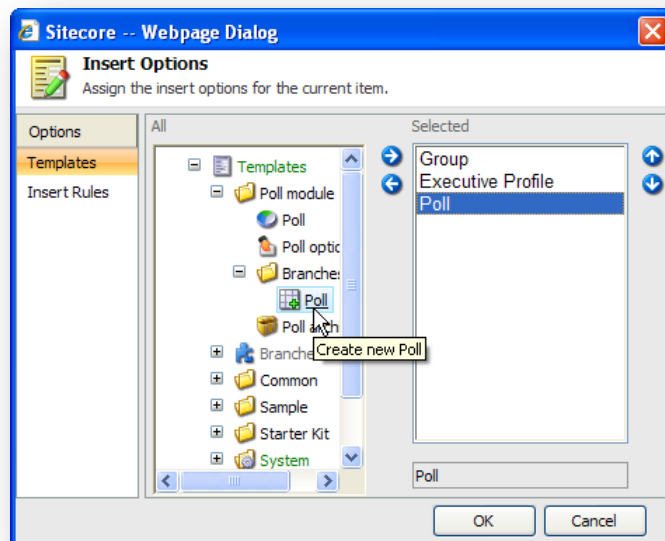
- Polls can be stored not only on a page, but in any item or a folder.
- You can manage all poll properties (for instance, edit the Thank you text, uncheck the “One vote per user” checkbox).

To create a poll using the Content Editor perform the following actions:

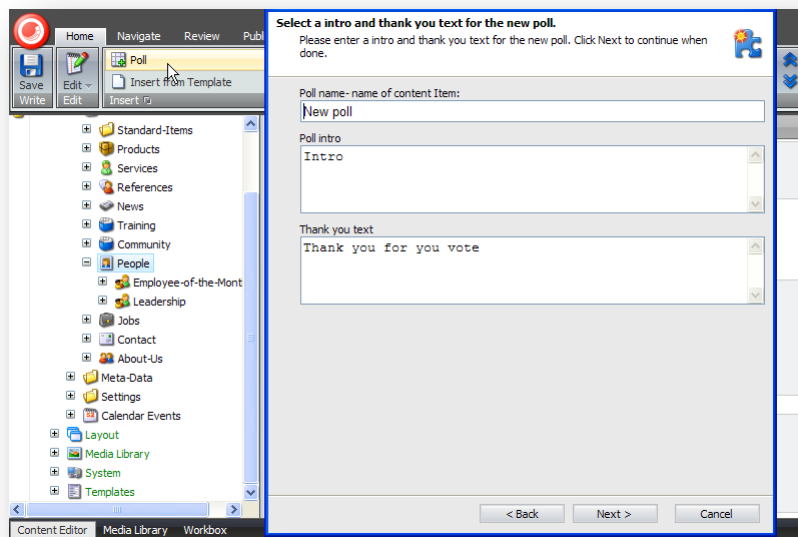
1. Select in the Content Tree the Item which will store a new poll.
2. Navigate to the **Home** tab and click the **Insert** control.



3. Add the poll branch to the selected Items and confirm your choice.

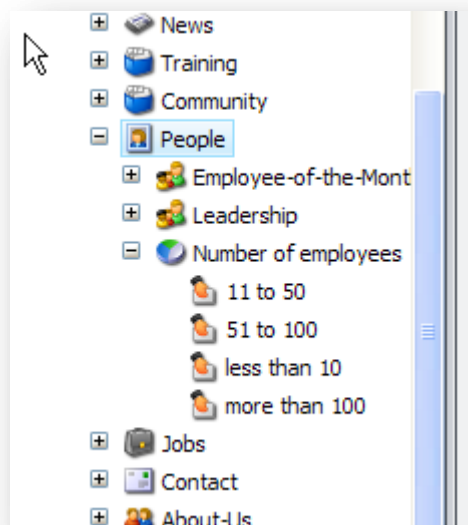


- Clicking the **Poll** branch in the **Insert** list runs the Poll Wizard.

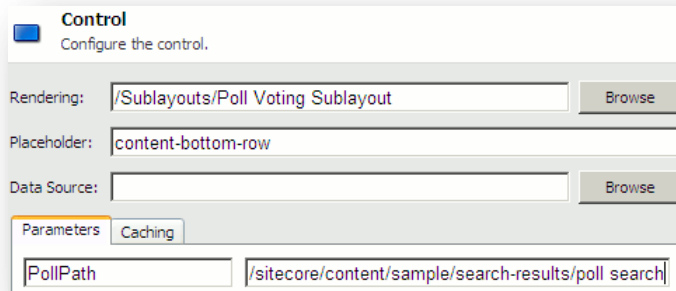


For detailed information on the Wizard see **Section 3.1.2, Poll Wizard**. This time the Wizard will, however, not display Step 3 (choosing a placeholder).

- The newly added poll will be displayed along with other subitems under the, selected on first step, item.



- In the next step define the placeholder and the rendering for the poll. Choose the “Poll Voting Sublayout” as a rendering. Add the PollPath attribute to rendering. The value to enter has to be the path to the added poll.



The screenshot shows the 'Control' configuration window with the following fields:

- Rendering:** /Sublayouts/Poll Voting Sublayout (with a 'Browse' button)
- Placeholder:** content-bottom-row
- Data Source:** (with a 'Browse' button)
- Parameters:** PollPath (with a value of /sitecore/content/sample/search-results/poll search)
- Caching:** (tabbed view)

The poll is now ready for use and can be previewed using the **Preview** functionality of the **Publish** tab.

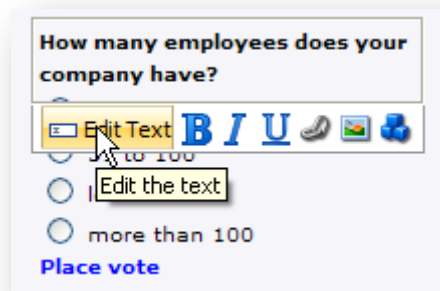
3.2 Managing Existing Polls

Polls can be managed in two different ways:

- Using the Page Editor** – the Page Editor enables you to place a poll on a certain spot on a page and to manage it. Recommended for users with basic knowledge of Sitecore.
- Using the Content Editor** – the Content Editor provides all poll creation and management options, such as closing the poll, etc.

3.2.1 Managing a Poll Using the Page Editor

- To be able to edit a poll on a certain Web site page log in to your Web site in the Page Editor mode.
- Go to the Web page with poll question and place the pointer over the element that you want to edit.



- Note that you can edit any visible text of the poll directly on the site. For edit poll question you can use the Text Editor buttons on the screenshot above to perform the following operations on the text:
 - Edit the text
 - Make the text bold
 - Make the text italicized
 - Underline text

- e. Insert a hyperlink within the text
- f. Insert a picture
- g. Go to the Content Editor for more editing options

Do not forget to save the changes. The page will reload automatically to apply the changes.

3.2.2 Managing a Poll Using the Content Editor

While managing a poll item among other things you can do the following:

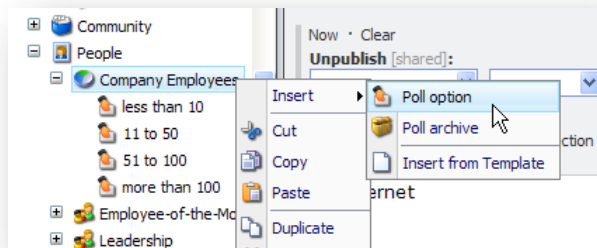
- Add, rename, edit, delete and sort poll options
- View poll results
- Reset poll results
- Close and unclosed the poll
- Start a sub-poll
- Allow site visitors to vote multiple times
- Define security preferences

These options will be described below in more detail.

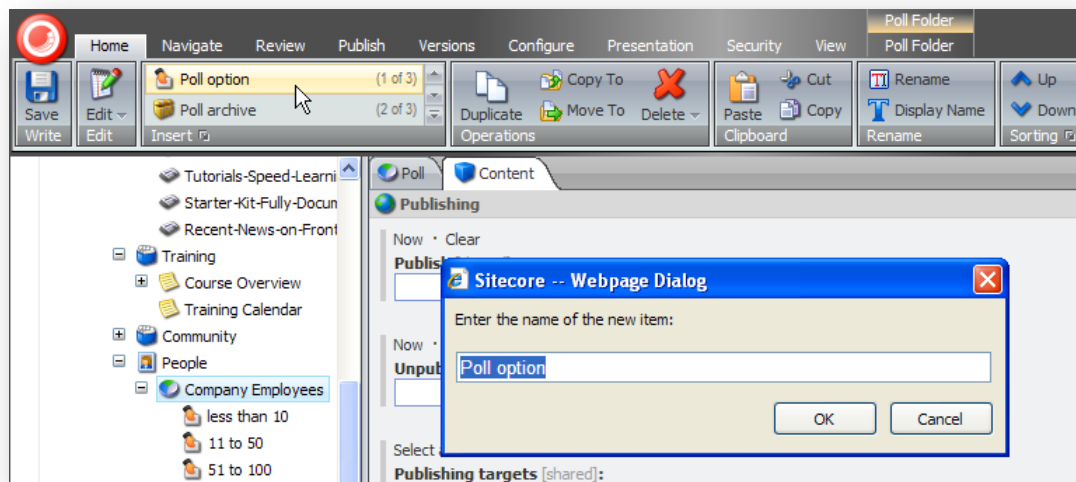
Adding, Renaming, Editing, Deleting and Sorting Poll Options

You can *add* a poll option in two ways:

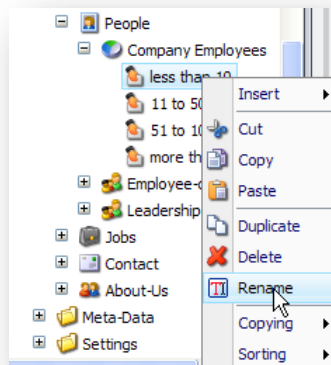
1. Insert a poll option by right-clicking on a poll item and using the Insert menu:



2. Insert a poll option using the Insert chunk on the Home tab:



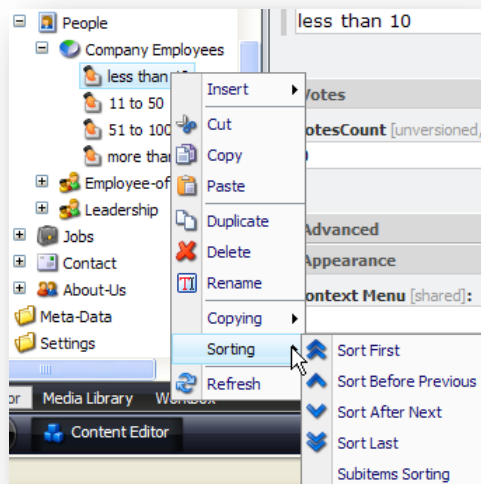
To *rename* a poll option right-click the required option item and click **Rename**.



To *edit* a poll option, just select it in the Content Editor.

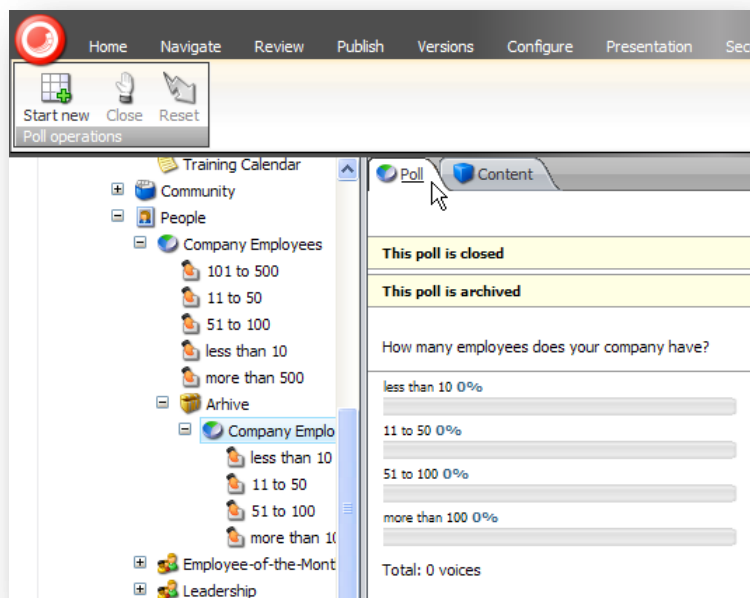
To *delete* a poll option right-click the option in question and select **Delete**.

To *sort* poll options use the sorting controls from the item menu.

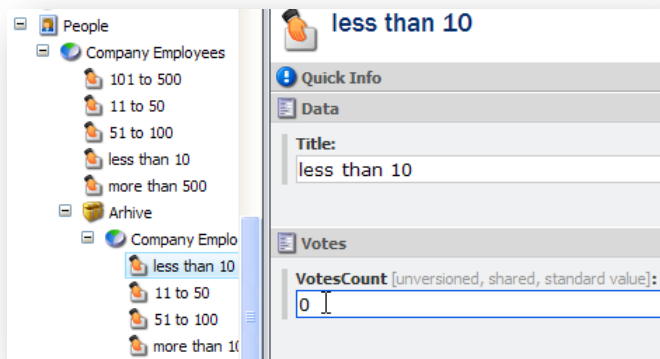


Viewing Poll Results

To view the poll results click the required poll in the Content Tree. The poll results will be displayed in the **Poll** tab on the right.

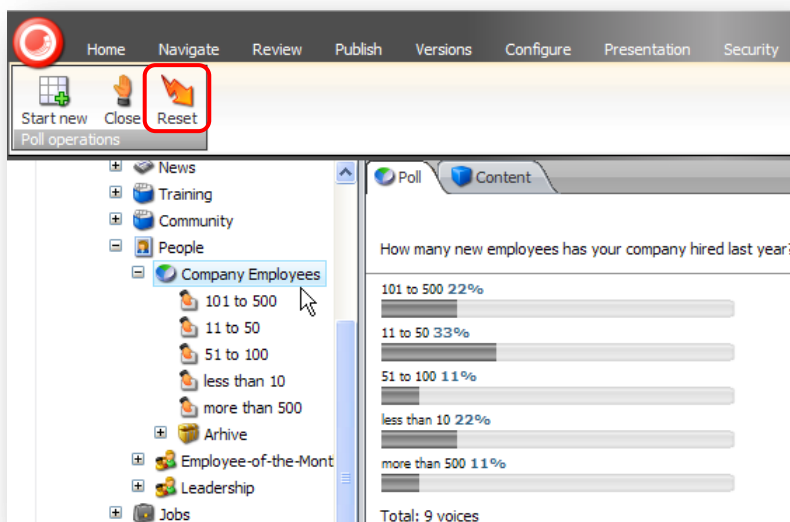


To view the number of votes for each single poll option, click this option. The results are stored in the **Votes** field section.



Resetting Poll Results

Poll voting results can be reset to the initial state. To reset poll results select the required poll item and click the **Reset** button in the **Poll operations** chunk. The number of votes for each separate poll option is reset to 0.

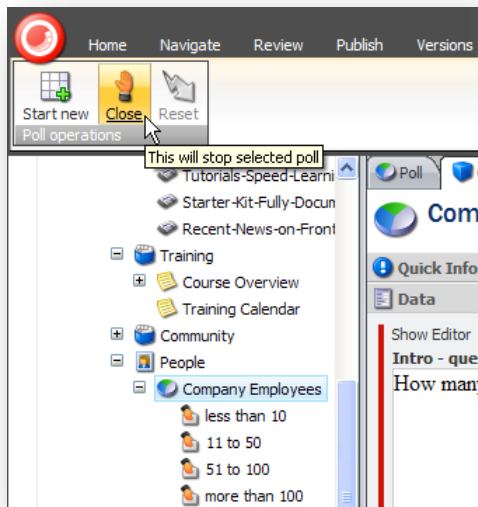


Note that you can perform Reset operation only on Polls which contain some votes. For Polls without votes this button is inactive.

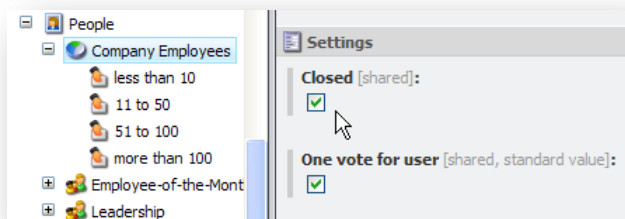
Closing and Unclosing Polls

Closing a poll in the Content Editor not only closes the poll for voting, but also hides the Poll on the web site. However, you can also unclosed the poll; and the poll will become visible on the site again.

To close the poll, click the respective button in the **Poll Operations** chunk.



Note that In the **Settings** field section the **Closed** checkbox is now checked.

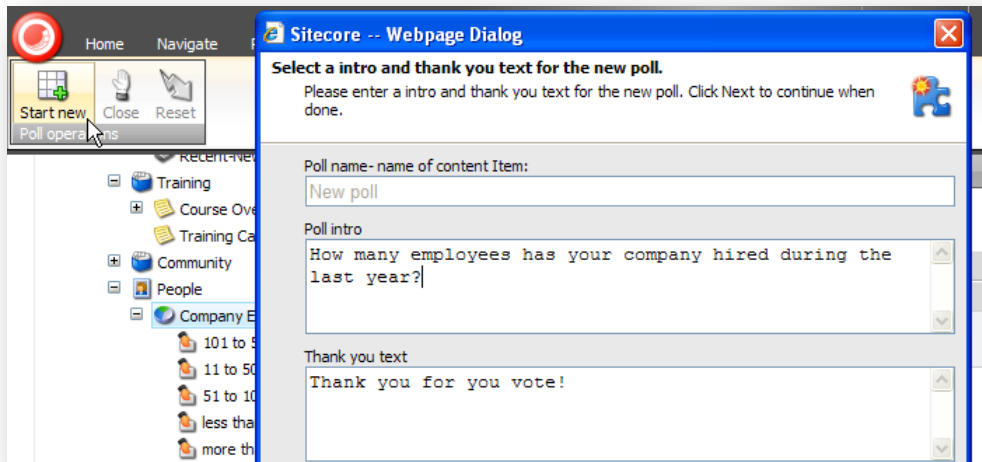


To make the poll visible again unclosed the poll by unchecking the **Closed** checkbox.

Starting a Sub-Poll

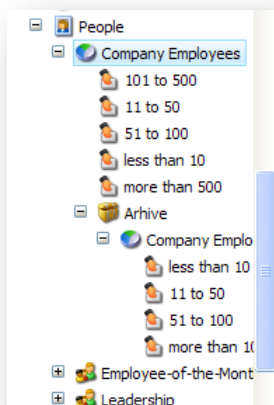
Sub-polls are created when you want to arrange a poll with poll options and a question different from an existing poll, but you want the new poll to use the same item in the content tree so that you don't have to edit the renderings. At the same time, the results of the previous poll are preserved in an archive.

To create a sub-poll, select an existing poll and click the **Start new** button in the Poll Operations chunk.



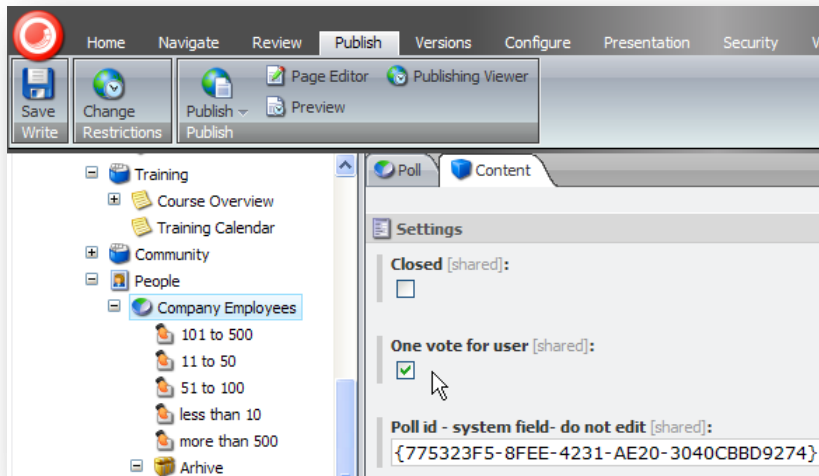
Notice that the **Poll name** field in the Wizard dialog is grayed out because the sub poll you create will use the same item as the previous one.

A newly created sub-poll is placed on top of the previous poll into the same item. The older poll will be put in the **Archive** folder as shown below.

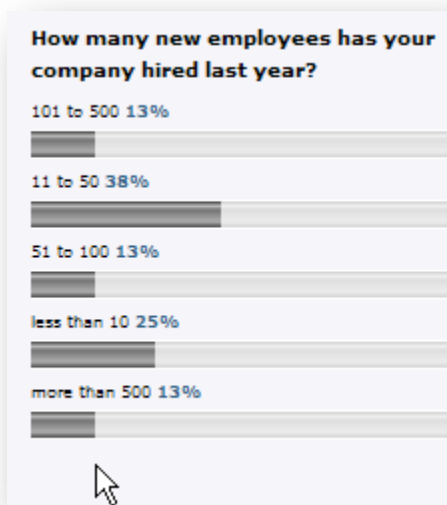


Allowing/Forbidding a Site Visitor to Vote Multiple Times

This option is controlled by the **One vote per user** setting:



If the **One vote per user** checkbox is selected, a site visitor can only vote once in a particular browser. After a site visitor has voted, a cookie ID corresponding to the current poll is created. As a result the site visitor who voted will not see the poll form any more. He or she will only see the vote results.



Note

In fact a site visitor can vote multiple times even if the checkbox is selected. To do this he or she has to delete the cookies of the browser involved.

If the **One vote per user** checkbox is not checked, a site visitor will be able to vote multiple times from one and same browser, just by refreshing page

Defining security preferences

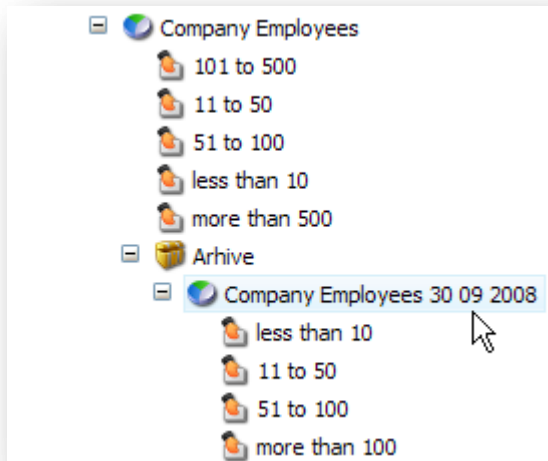
You can restrict access to the poll items like to any other Sitecore items.

3.3 Archiving Polls

Polls are archived automatically when a sub-poll is created with the **Start New Poll** command. See **Section Starting a Sub-Poll** for more details.

In the Archive you can view previous polls and their results.

An archived poll's name also includes the date when the poll was archived.



Chapter 4

Developer Hints

This chapter provides module architecture information for developers.

4.1 Module Architecture

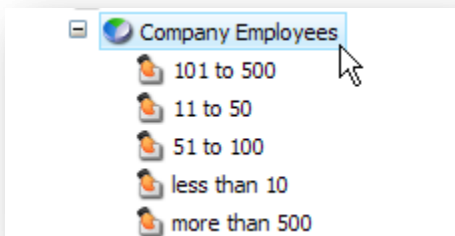
The current version of the Poll Module supports only one type of multiple choice questions - one from many. Voting is based on AJAX technologies so that only the poll item will be reloaded and not the whole page.

The Module supports staging scenarios. A poll module placed on a remote Web server can communicate with master database using the standard Sitecore WebService.

A poll module item has a nested structure of several levels.

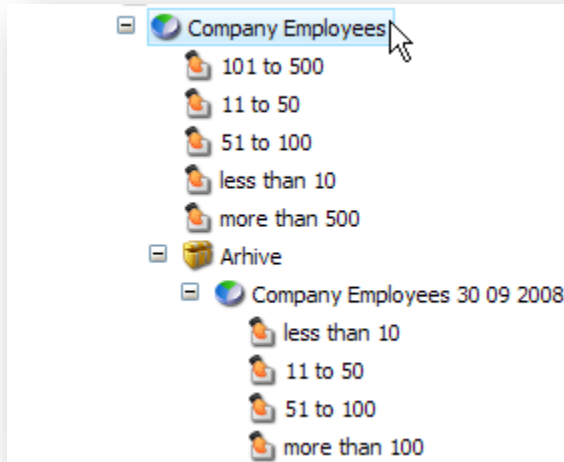
If a poll item does not contain an archive it consists of two levels:

- Poll item.
- Poll options



If a poll item includes earlier archived polls in the Archive folder it contains the following levels:

- Poll item
- Poll options and Archive folder
- Archive's poll item or items
- Archive's poll item's options

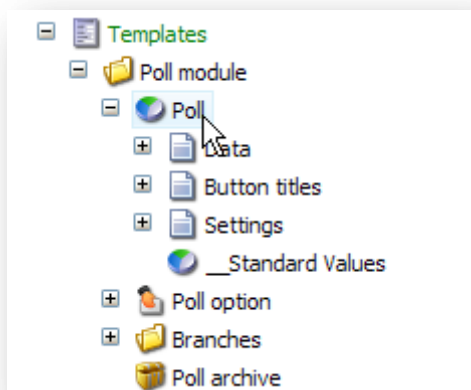


Warning

While adding a poll, make sure not use a rendering that would automatically take all subitems of an item for its output. A good practice example is a rendering which differentiates between different types of templates, for example the menu entry templates and the rest. Otherwise, you will not be able to insert polls normally at all.

4.1.1 Poll Item

The poll item is based on the poll item template.



The template has the following sections and fields:

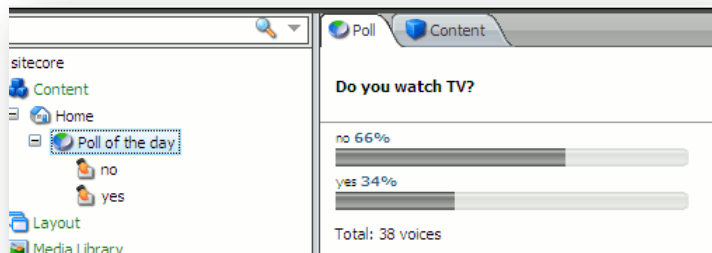
- The **Data** section contains the **Intro** and **Thank you** fields.
- The **Button titles** section contains title for **Place vote** button

- The section **Settings** contains a checkbox that indicates whether a poll is closed or not. The **Close** command in the contextual ribbon changes the state of this checkbox. Also this section contains the **One vote per user** checkbox.

The contextual ribbon of this Template allows performing such operations as create new, reset and close poll.

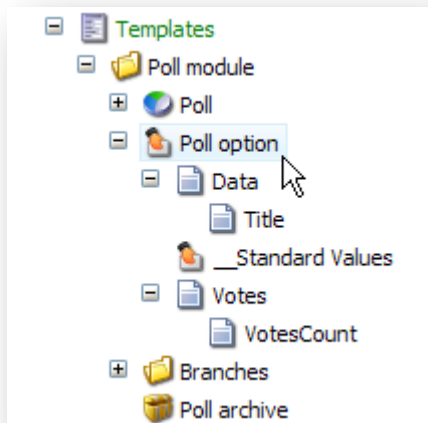
- **Start new** command creates a new poll.
- **Close** command prevents the poll control from rendering on the Web site.
- **Reset** nulls the votes count.

The Editor application of this Template displays current voting results, and indicates whether a poll is closed or archived.



4.1.2 Poll Item Options

Poll options are based on the poll option template.



Title is a mandatory field of the **Data** section, because it is used by client controls. Also a poll option item has the **VotesCount** field which contains a number of votes cast for this item.

4.1.3 Archived Poll Item

An archived poll item is based on the Poll archive template.