Administrator Guide To Managing Your Web Site
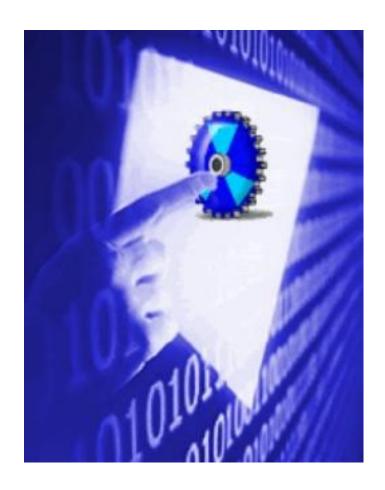
Revised 02.29.2012

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Managing Your User Account

Changing your Password

How to update the password associated with your user profile.

1. Login to the site.

2. Click on your [Display Name] link (typically located in the top right corner of the site. This displays the user profile page.

3. Click the Edit Profile link. This displays the Manage Profile page.

4. Click the ▣ Manage Password link.

5. In the **Change Password** section, update the following fields:

    a. In the **Current Password** text box, enter your current password.

    b. In the **New Password** text box, enter your new password.

    c. In the **Confirm Password** text box, re-enter your new password.

6. Click the ◆ Change Password link.
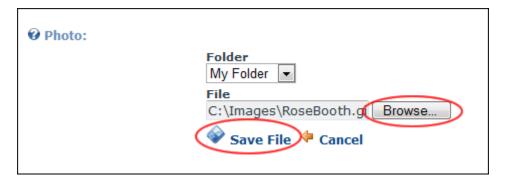
Managing your Profile Photo

How to manage the photo associated with your user profile.

1. Go to the Manage Profile page of the View Profile (also titled My Profile) module. See "Managing your User Profile"

2. Go to the **Photo** field and select from these options:

Uploading a New Image

1. Click the ⬆Upload File link.

2. Click the **Browse...** button and select the file from your computer.

3. Click the Save File link to save the selected file.

4. This displays the selected image.

5. Click the Update link.

Selecting a Previously Uploaded Image

1. At **File**, select the required photo from the drop-down list. This displays the image to the right of this field.

Removing Images from Profile

1. At **File**, select **<None Specified>**.

Managing your User Credentials

How to manage your user credentials including your names and email address. Note: Your user name cannot be changed.

Mandatory fields are indicated by the **Required** ⊝ button.

1. Login to the site.

2. Click on your [Display Name] link (typically located in the top right corner of the site).

3. Click the Edit Profile link. This displays the Manage Profile page.

4. Update any of these User Credentials:

   a. In the **First Name** text box, edit your first name.

   b. In the **Last Name** text box, edit your last name.

   c. In the **Display Name** text box, edit the name you want to be displayed to other site members.

   d. In the **Email Address** text box, edit your email address.

5. Click the ◆Update link.

Managing your User Credentials

Managing your User Profile

How to manage all your personal user details including your name, contact details, biography, photo, time zone and preferred locale. The fields used in this example are typical for a US based site, however sites in other countries will typically use local names for address fields, etc. You can also set the visibility of each field. **Public** sets a field as visible to anyone who is able to view your user profile, **Members Only** sets a field as visible to authenticated site members, **Admin Only** sets a field as visible to Administrators only.

Mandatory fields are indicated by the **Required** ⬅ button.

1. Login to the site.

2. Click on your [Display Name] link (typically located in the top right corner of the site).

3. Click the Edit Profile link.

4. Click the 👥Manage Profile link.

5. Complete or edit any of the following fields and select the **Visibility** of each field:

   a. In the **Prefix** text box, enter a prefix for the name. E.g. Mrs

   b. In the **First Name** text box, enter the first name. E.g. Elizabeth

   c. In the **Middle Name** text box, enter the first name. E.g. Angela

   d. In the **Last Name** text box, enter the first name. E.g. Smith

   e. In the **Suffix** text box, enter a suffix for the name. E.g. MD

   f. In the **Unit** text box, enter a unit number. E.g. Flat 2

g. In the **Street** text box, enter the street address. E.g. 101 Blackburn Road

h. In the **City** text box, enter the city. E.g. New York

i. In the **Region** text box, enter/select the region. E.g. New York

j. At **Country**, select a country from the drop-down box.

k. In the **Postal Code** text box, enter/select the postal code. E.g. 11111

l. In the **Telephone** text box, enter your telephone number.

m. In the **Cell/Mobile** text box, enter your mobile number.

n. In the **Fax** text box, enter your facsimile number.

o. In the **Website** text box, enter your web site URL. E.g. www.ecozany.com

p. In the **IM** text box, enter you instant messenger id. E.g. rose.booth@ecozany.com

q. At **Photo**, select, upload or remove a photo or image for your profile. See "Managing your Profile Photo"

r. In the **Biography** Editor, enter a biography.

s. At **Time Zone**, select a time zone from the drop-down box.

t. At **Preferred Locale**, select the name of your locale from the drop-down box.

   i. Select one of these options:

      - **Display English Name**, select to display your locale in English. E.g. Italy.

      - **Display Native Name**: Select to display the native spelling of your locale. E.g. Italia.

6. Click the Update link.

Subscribing to Member Services NOTE: This feature is currently unavailable

Configuring Your Web Site
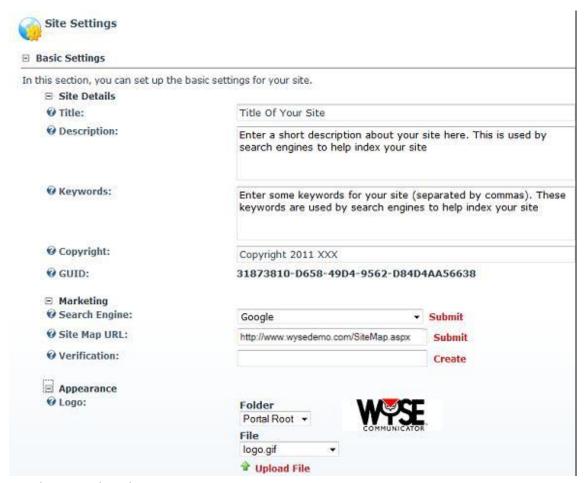
Overview of the Admin Tools
NOTE: The Admin page and its child pages are displayed ONLY to Administrators.

About the Site Settings Page
The Site Settings page enables Administrators to configure basic and advanced site settings.
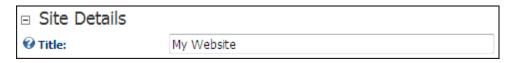
Setting the site title

How to set the site title which is displayed in the title bar of the Web browser.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section.

3. In the **Title** text box, enter a title for the site.

4. Click the ♦Update link.

The Site Title

Setting the site description

How to set the description used by search engines to index this site.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section.

3. In the **Description** text box, enter a description for this site.
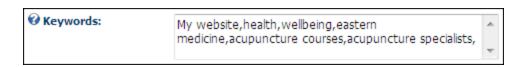
4. Click the ♦Update link.

Adding the site keywords

How to add keywords that are used by search engines to index this site.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section.

3. In the **Keywords** text box, enter one or more keywords that are common and unique to your site, separated by commas.
   E.g. pets,pet products,pet beds,dog food,dog beds.

4. Click the Update link.

Displaying the default site Copyright

How to set the copyright notice for the site to automatically display the current year and the site title.

NOTE: If the title of your site is **My Web site**, leave the field blank to display **Copyright (c) 2011 My Web site**. If the Title field is blank, the copyright notice will instead display the text Copyright (c) 2011.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section.

3. In the **Copyright** text box, leave the field blank.

4. Click the Update link.

Creating a unique Copyright

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section.

3. In the **Copyright** text box, enter your unique copyright text.

4. Click the Update link.

Marketing

Submitting your Site to Search Engines

How to submit the site to one or more search engines for indexing. This will add the site to the search engine's list of sites to be indexed.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section and ensure the Title, Description and Keywords fields are complete.

3. Go to the **Basic Settings - Marketing** section.

4. At **Search Engine**, select either the **Google**, **Yahoo** or **Microsoft** search engines.

5. Click the Submit link.

6. Repeat Steps 4-5 to submit your site to one or both of the other search engines.

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*Tip: Administrators can also add a title, description and keywords to **each** site page. The quality of this information will affect your ranking on search engines, therefore it is recommended that these fields are completed for all pages **before** submitting the site.*

Submitting your Site Map URL to Google

How to submit a site map URL of your site to Google for improved search optimization.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings - Site Details** section and ensure the Title, Description and Keywords fields are complete.

3. Go to the **Basic Settings - Site Marketing** section.

4. At **Site Map URL**, click the Submit link. This opens the Google Webmaster Tools web page in a new Web browser.

5. On Google Webmaster Tools:

   a. If you do not have a Google Account, sign up for one.

   b. Sign in to **Google Webmaster Tools** with your Google account.

   c. Go to the **Dashboard**.

   d. In the **Add Site** text box, enter the URL of your site.
      E.g. http://www.YourSite.com/

   e. Click the **OK** button to confirm.

   f. Click the Verify link.

g. Select **Upload an HTML file**. This will display a unique file name. Copy this name.

6. Return to your **Site Settings** page:

   a. In the **Verification** text box, enter the file name.

   b. Click the <u>Create</u> link.

7. Return to **Google Webmaster Tools**:

   a. Click the **Verified** button.

   b. On the **Google Sitemaps** tab, select **Add General Web Sitemap**.

   c. Copy and paste the URL displayed into the **Site Map URL** text box on your Site Setting page.
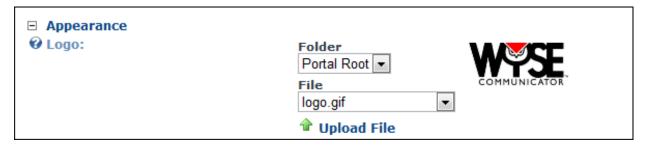
Submitting your Site Map URL to Google

Setting Your Site Logo

The site logo is generally displayed in the top section of your web site. Size of the logo is totally dependent upon the skin design being used so you should check with us for correct dimensions before uploading a new logo.

1. Navigate to Admin > **Site Settings**.

2. Go to the **Basic Settings** section.

3. **Maximize** ⊞ the **Appearance** section.

4. At **Logo**, select an existing image file - OR - Upload a new image file.
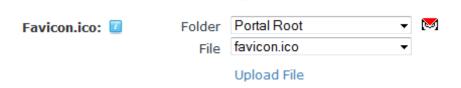
5. Click the <u>Update</u> link.

Setting the Favorites Icon

How to set the **favicon** for your site. A favicon (short for favorites icon) is an icon file, most commonly 16x16 pixels, associated with a particular web site. Browsers that support favicons typically display a site's favicon in the browser's address bar and next to the site's name in a list of bookmarks. Browsers that support a tabbed document interface typically show a site's favicon next to the site's title on the tab, and site-specific browsers use the favicon as desktop icon. The favicon is an important aspect of a site's brand.

NOTE: the icon MUST be an .ico file format!

1. Navigate to Admin > **Site Settings**.

2. Go to **Basic Settings** and Maximize ⊞ the **Appearance** section.

3. At **Favicon.ico**, select from these options:

4. To select an existing file: Select the **Folder** where the file resides and then selecting the required file from the **File** drop down list.

5. To upload a new file: Click the Upload File link and then click the **Browse...** button and select the file from your computer. Click the Save File link. The uploaded file will be selected automatically.

Favicon.ico: 🛈	Folder	Portal Root ▾ 📧
	File	favicon.ico ▾
		Upload File

You can create your favicon for free here: http://www.favicon.cc
(or any other free icon creator site that you may find)

INSTRUCTIONS (*for www.favicon.cc*)

1. Click on Import Image
2. Select your image and upload it
3. Download it (below the Preview section)
4. Be sure that it is named **favicon.ico**
5. Upload it (see step 5 directly above)

Now access your site in a browser to see your fav icon (note: Internet Explorer can be a bit stubborn due to caching, you will most likely have to clear your browser's cache and/or refresh several times before it displays to you. In other browsers, such as Firefox or Chrome, it usually appears immediately)

best practice is to use an image that is in the shape of a square. The favicon creator at the above link allows you to choose from 2 options, usually selecting 'Keep Dimensions' provides best results but depending upon the shape of your image, the second option may be better in your case. Experiment with it to see which type gives you the best results.

Managing Your Web Pages

This section provides information on viewing, adding and managing pages.
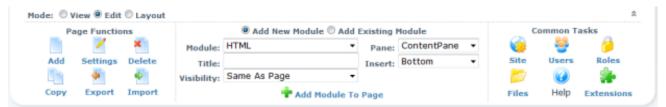
Viewing Any Page
How to view any page within a site, including those which are not included in the menu.
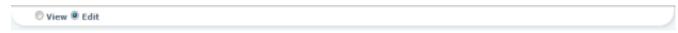
- **Option One**: If the page is visible (included) in the menu, then navigate to the page using the site navigation menu.

- **Option Two**: If the page is hidden (not included in the menu), you can create a link to the hidden page using a module to access it. NOTE: Administrators can view all hidden pages in the *Admin >Pages* section.

Adding A New Page
How to add a new page to your site using the **Control Panel**.

View of the Control Panel (above image), located at the top of each web page within your site – viewable only by Administrators and any users with Edit Page permissions. Else the view is limited to View/Edit mode (below image)

1. Click on the HOME page link in the navigation menu.

2. On the Control Panel, click on the ⬜ Add button.

3. You will now be redirected to the **Page Details** section.

4. In the **Page Name** text box, enter a name for the page. This is the name which appears in the menu. *Note: the Page Name can be changed at any time after its creation*

5. In the **Page Title** text box, enter a short, descriptive sentence summarizing the page content. The title is used by search engines to identify the information contained on the
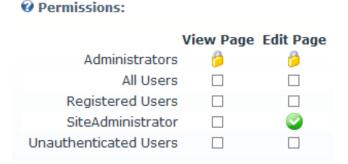
page. It is recommended that the title contains at least 5 highly descriptive words and does not exceed 200 characters.

6. In the **Description** text box, enter a description of the page content. The description is used by search engines to identify the information contained on the page. It is recommended that the description contains at least 5 words and does not exceed 1000 characters.

7. In the **Keywords** text box, enter key words for this page separated by comma.

8. At **Parent Page**, select **<None Specified>** to set this page as a parent page - OR – if it will be a child page, select the intended parent page from the drop-down box.
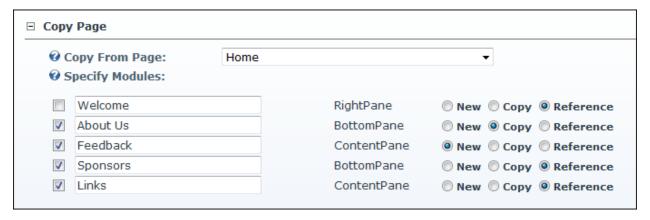
8a. At **Insert Page**, select from these options to choose the location of the new page in the menu:

  o Select a page from the drop-down box and then select to add the new page either **Before** or **After** that page in the menu on the current level.

  o Select **Add to End** to add the new page to the end of the menu on the current level.

9. At **Include In Menu?**, check ☑ the check box to include this page in the navigation menu- OR - Uncheck ☐the check box to hide the page. If a page is not included in the menu (hidden), you can still link to it based on its page URL.

10. Access the **Permissions** section. **IMPORTANT!** If you give *EDIT PAGE* permissions to any role other than the Administrators role, the users in that role will be able to add, modify or delete the page, as well as add, modify or delete modules on the page. It is best practice to apply editing permissions at the Module level, not the Page level.

11. OPTIONAL. **Copy Page** (this function is only available at time of new page creation)

  a. At **Copy From Page**, select the page to be copied.

  b. At **Specify Modules**, complete the following steps for each module:

c. To copy a module:

    i. In the module title text box, enter a new module title if required.

    ii. Select one of the following options:

        1. **New**: This will add the module without any content.

        2. **Copy**: This will add the module with an independent copy of the module content. Modifying copied content doesn't update the content of the original module. Note: This option will be disabled for modules which don't have content which can be copied such as the Feedback and Account Login modules.

        3. **Reference**: This will add the module with a referenced version of the copied content. Modifying referenced content updates both copies of the module.

d. To NOT copy a module:

    i. Uncheck ☐ the check box beside any module you do NOT want copy.

12. Access the **Advanced Settings** section.

13. In the **Appearance** section, complete any of the following **optional** settings:

a. At **Page Skin**, select a skin from the drop down list. If **<None Specified>** is selected, the default Web site Skin is used.

b. At **Page Container**, select a container from the drop down list. If **< None Specified >** is selected, the default Web site Container is used.

c. At **Disabled**, select from these options:

    ▪ Check ☑ the check box if the page will not contain any content, but rather serve as a placeholder. *i.e. When you click on the page name in the menu nothing happens*. This option is typically selected for a parent page to provide a way for users to navigate to its child pages.

- Unchecked ☐the check box for this page name to be a link to the page. This is the default option.

14. In the **Other Settings**, the following **OPTIONAL** settings are available:

   a. At **Secure?** check ☑ the check box to force this page to use a secure connection or secure socket layer (SSL). This option requires the Hosting Administrator to configure the SSL Settings on the Admin > Site Settings page.

   b. At **Site Map Priority**, enter the desired priority (between 0 and 1.0). This helps determine how this page is ranked in Google with respect to other pages on your site (0.5 is the default).

   c. At **Start Date**, click the Calendar link and select the first date the page is viewable. **Bug**: A known bug prevents Administrators from viewing a page with a start date before it goes live. As a workaround, consider setting the start date after adding content to the page.

   d. At **End Date**, click the Calendar link and select the last date the page is viewable. Note: Expired pages can be viewed by Administrators via the Admin > Pages page.

   e. At **Link URL**, to set this page to be a navigation link to another resource, select or add the Link here.

15. Click the ◆Update link.

Moving A Page

How to move a page to a new location on the site menu.

NOTE: do not attempt to move the HOME page from its current location!

1. Go to the required page.

2. Maximize ⯆ the Control Panel.

3. Select the Settings 📝 button.

4. Go to the **Page Details** section.

5. At the **Parent Page** drop-down, select a new parent page, or select **<None Specified>** to change this page to be a parent page (if currently a child page).

❷ Parent Page	<None Specified> ▼
❷ Insert Page:	○ Before ⦿ After ○ Add to End
	Home ▼

6. Click the ◆Update link

Copying a Page

See step #14 above in the *Add A New Page* section

Deleting a Page

How to delete a page from a site.

NOTE: the Home page cannot be deleted. The last visible page can also not be deleted.
Tip: Deleted pages (and Modules) are stored in the Recycle Bin where they can be restored or permanently deleted by Administrators.

1. Go to the required page.

2. Maximize ⩔ the Control Panel.

4. Select the Delete ❌ **button**.

5. This displays the message "Are you sure you want to delete this page?"

6. Click the **OK** button to confirm

Edit an existing Page
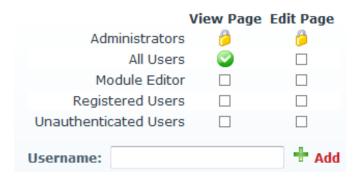
1. Go to the required page.

2. Maximize ⩔ the Control Panel.

3. Select the Settings ✏ button.

4. Go to the **Page Details** section.

5. Edit any page settings as necessary.

6. Click the ◆ Update link

About Page Permissions

How to set access to view, edit and manage pages and page content setting permissions by roles and/or usernames.

This tutorial provides an overview of the different page permissions available. For full details See "Setting Page Permissions" below.

- **View Page**: View permissions enable role users to view the page. The *All Users* role represents everyone (general public), and this role is usually not checked until a page is complete and ready for viewing.

- **Edit Page**: Edit permissions give users full administrative rights for the page.
  *Tip: if user will not be an Administrator it is best practice to set the **edit** permissions at the module level, not the page level.*
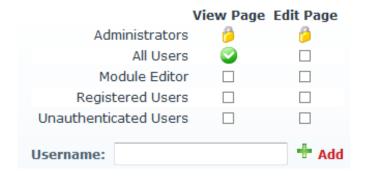
Setting Page Permissions

How to set page permissions by roles and/or username. **Note:** Access to view and set page permissions are only available to Administrators and any users that Administrators specify to have Edit permissions for the page. It is best practice to keep Administrators as the ONLY users with Page Edit permissions.

1. Go to the required page.

2. Maximize ⌄ the Control Panel.

3. Select the Edit ✎ button.

4. Go to the **Permissions** section.

5. In the **View Page** column, click on the check box beside a user role (or user) repeatedly until the correct permission is displayed.

   o ✅**Permission Granted**: Permission to view the page is granted.

   o ❌**Permission Denied**: Permission to view the page is denied.

   o ☐**Not Specified**: Permissions are not specified. Users cannot view the page unless they belong to another role/username which has been granted permission, or are granted Edit Page permissions.

6. In the **Edit Page** column, select from these options:

   o ✅**Permission Granted**: Users with Edit Page permissions have full administrative rights for the page. *Tip: It is best practice to keep Administrators as the ONLY users with Edit Page permission*s.

- o ❌**Permission Denied**: Permission to edit the page is denied.

- o ☐**Not Specified**: Permissions are not specified.

7. OPTIONAL. Define an existing Username (a registered user of your site). This may be useful when you only want one (or more) certain individuals to have view/edit access and not the entire list of users in a particular role.

   Click on the ADD button after entering a Username.

8. Click the 🔷Update link

Managing Your Security Roles

About the Security Roles Module

The Security Roles module enables the creation and management of security roles and security role groups. It also permits Administrators to manage users within roles.

Default Security Roles

The Security Roles module has three (3) default Security Roles: Administrators, Registered Users and Subscribers.

- **Administrators:** for Wyse Solutions personnel only.

- **Registered Users:** Everyone who is a registered user of this site is a member of this role. Members of this role can manage their User Profile and may be granted rights to view pages and modules which are only displayed to logged in users. Registered user accounts can be set as either Authorized or Unauthorized. If an account is Unauthorized, then the user cannot access pages/modules which are restricted to this role. This role cannot be deleted or modified.

- **Administrator:** Members of this role have full access to manage the site. This includes access to add, delete and edit all pages and modules on the site. Members of this role also have access to the Admin pages, which enable users to access all of the Site Administration modules.
  IMPORTANT! This role should not be deleted or modified!

Security Role Groups

The following terms are used throughout the web site. They refer to groups of users as well as their status.

- **All Users:** All Users refers to all site visitors regardless of whether they are logged in or registered on the site. This term is used on page and module setting pages to enable them to be set as accessible to all users. This term is not used on the Security Roles module.

- **Authenticated Users:** An authenticated user is a registered user who is logged into the site.

- **Unauthenticated Users:** An unauthenticated user is a site visitor who isn't logged into the site. This term is used on page settings and module setting pages, but not on the Security Roles module. A typical application for this user group would be to set a page or module as viewable to Unauthenticated Users, but not to All Users. Then when a user logs into the site the page or module would no longer be displayed. This could be used for information about joining the site which isn't relevant to users who are already registered.

About Security Role Settings
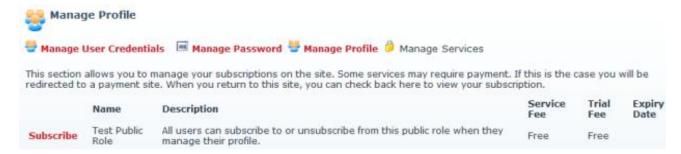
Security Roles can be configured in a number of ways to change the way users can access roles. The following options are available.

- **Public Role:** Roles set as public enable all registered users to be able to subscribe or unsubscribe to the role. Public Roles are managed by authenticated users under Membership Services on the User Account module.

- **Private Role:** When a role is not set as public, it is a private role. Only Administrators have access to manage user access to these roles, unless the role includes an RSVP Code.

- **NOT AVAILABLE** **RSVP Code:** When a role includes an RSVP code, users can subscribe to the role by entering the code into a text box under Manage Services on their profile. This provides a quick way to subscribe and also enables subscriptions to be limited to those with the code if the role is set as Private.

- **NOT AVAILABLE RSVP Link:** The RSVP link setting automatically adds a user to that role when they go to the RSVP link. This provides a very easy way of subscribing to a role.

- **Auto Assignment:** All registered users are automatically added to these roles upon registration. If the role is also set as Public, users can unsubscribe and unsubscribe to it. If the role is set as Private, only Administrators can manage user access.

Adding a Security Role (Basic Settings)

1. Select ➕**Add New Role** from the module menu.

2. In the **Basic Settings** section complete the following fields:

   a. In the **Role Name** text box, enter a name for the Security Role.

   b. In the **Description** text box, enter a brief description of the Security Role.

   c. **OPTIONAL**. At **Role Group**, select a group for this role if desired. *Note: One or more role groups must already be created to set this field. You can also associate a role with a role group at a later time.*

   d. At **Public Role?**, select one of the following options:

      - Check ☑the check box if all users are able to view details of this role and subscribe to this role. Users can subscribe to or unsubscribe from these roles when they manage their profile.

      - Uncheck ☐the check box if the role is Private. Only Administrators can add a user to a private role.

   e. At **Auto Assignment?**, choose from the following options:

      - Check ☑the check box if users are automatically assigned to this role.

      - Uncheck ☐the check box if users must be manually added to the role.

4. Click the 🔷Update link.

   NOTE: Advanced Settings are not applicable to your site

EXAMPLE OF A TYPICAL ROLE THAT YOU MAY WANT TO CREATE: **Module Editor**

Editing a Security Role

How to edit the settings and details of a security role.

1. If the required role is not displayed, at **Filter By Role Group** select the [Role Group Name] associated with the role, or select **<All Roles>**.

2. Click the **Edit** 🖊 button beside the role to be edited.

3. Edit the settings as required.

4. Click the 🔷Update link.

Deleting a Security Role

How to permanently delete a security role from the Security Roles module. This will also delete the information of which users were members of this role.

1. If the required role is not displayed, at **Filter By Role Group** select the [Role Group Name] associated with the role, or select **< All Roles >**.

2. Click the **Edit** 🖊 button beside the role to be deleted.

3. Click the ✖ Delete link. This displays the message "Are You Sure You Wish To Delete This Item?"

4. Click the **OK** button to confirm.

Adding a Role Group

How to add a role group to a Security Role. Role Groups enable you to group multiple roles together, making them easier to manage. E.g. A Role Group called Staff could have the following Security Roles associated with it: All Staff, Telemarketing, Marketing, Sales, Information Technology, etc. Roles can be filtered by Role Group, which is useful on sites with lots of roles. Once a role group has been added, one or more security roles can be added to the role group.

1. Select ✚ **Add New Role Group** from the module menu - OR - Click the ✚ <u>Add New Role Group</u> link.

2. In the **Group Name** text box, enter a name for the Security Role Group. E.g. Staff

3. In the **Description** text box, enter a brief description of the Security Role Group.

4. Click the <u>Update</u> link.

Editing a Role Group

How to edit a security role group.

1. At **Filter By Role Group**, select the role group from the drop-down box. This displays the Edit button beside this field.

2. Click the **Edit** 🖊 button. This opens the Edit Role Group page.

3. In the **Group Name** text box, edit the name of the role group.

4. In the **Description** text box, edit the role group description.

5. Click the <u>Update</u> link.

Deleting a Role Group

How to delete a role group.

Tip: You must first remove all roles belonging to that role group. This can be achieved by editing each role associated with the Role Group and either changing the associated role group - OR - disassociating the role group from all roles. E.g. selecting <Global Roles>. If a role group has associated roles, the delete option will not be displayed.
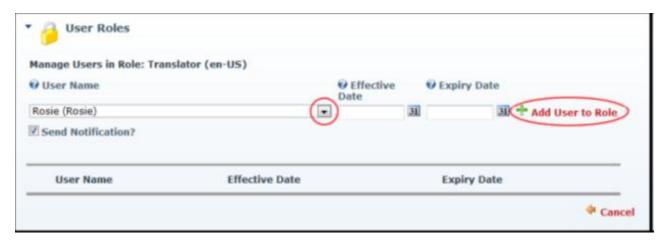
1. At **Filter By Role Group**, select the role group from the drop-down box.

2. Click the **Delete** ✖ button. This displays the message "Are You Sure You Wish To Delete This Item?"

3. Click the **OK** button to confirm.

Adding a User to a Security Role

How to add a user to a security role. Once a user is added to a new role they will immediately gain access to any modules or pages restricted to the members of the selected role. The user may need to refresh their Web browser to view additional areas of access.

1. Click the **Manage Users** button beside the required role.

2. At **User Name**, select or enter a user name.

3. **OPTIONAL**. At **Effective Date**, click the **Calendar** button and select the first date the user can access this role. Where no date is selected access will be immediately granted.

4. **OPTIONAL**. At **Expiry Date**, click the **Calendar** button and select the last date the user can access this role. Where no date is selected access will not expire.

5. **OPTIONAL**. At **Send Notification?**, select from the following options:

   ▪ Check ☑ the check box to send a notification email to the user. This option is ticked by default.

   ▪ Uncheck ☐ the check box to add the user to a role without sending them notification.

7. Click the ✚ Add User to Role link. The name of the user will be added to the list of users associated with this role.

7. Repeat Steps 3-7 to add new users.

8. Click the ◆Cancel link to return.

Deleting a User from a Security Role

How to delete a user from a security role. Users will immediately be denied access to any modules or pages which are restricted to members of the selected roles.
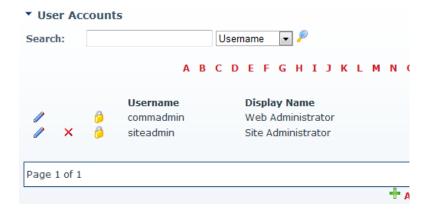
1. If the required role is not displayed, at **Filter By Role Group** select the [Role Group Name] associated with the role - OR - Select **<All Roles>**.

2. Click the **Manage Users** button beside the required role. This opens the Manage Users In Role page for the selected role.

3. Locate the user and click the **Delete** ✗ button located to the left of their name. This displays the message "Are you sure you want to remove [username] from the [role name] role?"

4. Click the **OK** button to confirm.

User Accounts

About the User Accounts Module

The User Accounts module enables the creation and management of registered user's account, as well as assignment of security roles. The fields displayed on the module can be set, as well as the way user accounts are handled.
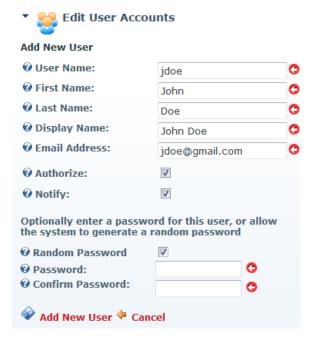
Adding a User Account

How to add new user account to the site using the User Accounts module.

1. Select ➕**Add New User** from the User Accounts module menu - OR - Click the ➕ Add New User link. This opens the Add New User page.

2. In the **User Name** text box, enter a user name. *The user name can never be changed.* Note: Usernames are unique; a new user cannot be added with an existing Username. If you attempt to save a user account using an existing username this displays the message: "A User Already Exists For the Username Specified. Please Register Again Using A Different Username."

3. In the **First Name** text box, enter the person's first name.

4. In the **Last Name** text box, enter the person's last name.

5. In the **Display Name** text box, enter the name to be displayed to other site members. Note: This field may not be displayed.

6. In the **Email Address** text box, enter a valid email address.

7. At **Authorize**, select from the following options:

   o Check ☑ the check box if the user is authorized to access the site. This will automatically provide access to the Registered User role and any roles set for Auto Assignment. This is the default setting. Generally a Registered User can only login to the site and access pages/modules assigned for viewing to the Registered User role.

   o Uncheck ☐ the check box if the new user is not yet authorized to access the site. The Administrator is required to authorize this account at a later date.

8. At **Notify**, select from the following options:

   o Check ☑ the check box to send a notification email to the user's email address. This is the default setting.

   o Uncheck ☐ the check box if you don't wish to send notification. If the account is not authorized, you may like to send the notification at a later time.

9. To create the user's password, select from these options:

   o To generate a random password, check ☑ the **Random Password** check box.

   o To create a password manually:

      a. Uncheck ☐ the **Random Password** check box.

      b. In the **Password** text box, enter a password.

      c. In the **Confirm Password** text box, re-enter the same password.

10. Click the ◆ Add New User link.

Editing a User Account

How to edit the details of a user's account using the User Accounts module.

NOTE: The user name field cannot be edited.

---

1. Find the user to be edited using a filter or by searching.

2. Click the **Edit** ✏ button beside their record. This opens the Edit User Accounts - **Manage User Credentials** page.

3. Edit one or more fields as required. Editable fields are the user's first name, last name, display name and email address.

4. Click the ◆Update link.

Tip: Additional options are also available on the ▦ Manage Profile Properties page.

Unauthorize an Authorized User
How to unauthorize a user account using the User Accounts module. Unauthorized users will be unable to login to the site or thereby removing their access to all role restricted areas.

1. Find the user to be unauthorized using a filter or by searching.

2. Click the **Edit** ✏ button beside their record. This opens the Edit User Accounts - Manage User Credentials page.

3. Click the 🔒UnAuthorize User link.

Authorizing an Unauthorized User
How to authorize an unauthorized user account.

1. Click the Unauthorized link to display only unauthorized accounts and find the required account.

2. Click the **Edit** ✏ button beside their record.

3. Click the 🔒Authorize User link.

4. This display the message "✅ User Successfully Authorized" at the top of the Edit User Accounts module. The Authorized check box is now checked.

Deleting a User Account

How to permanently delete a user account from a site using the User Accounts module.

Tip: If you don't want to permanently delete the user, you can unauthorize their account instead.

---

1. Find the user to be deleted using a filter or by searching.

2. Click the **Delete** ✕ button beside their record. This displays the message "Are You Sure You Wish To Delete This Item?"

3. Click the **OK** button to confirm.

Deleting all Unauthorized User Accounts

How to permanently delete all unauthorized user accounts using the User Accounts module.

1. **OPTIONAL.** Click the <u>Unauthorized</u> link to view a list of unauthorized users before deleting them.

2. Select ✕**Delete Unauthorized Users** from the module menu - OR - Click the ✕ <u>Delete Unauthorized Users</u> link. This displays the message "Are You Sure You Wish To Delete This Item?"

3. Click the **OK** button to confirm deletion.

Adding a User to a Security Role

How to add a user to a Security Role using the User Accounts module.

1. Find the required user by using a filter or by performing a search.

2. Click the **Manage Roles** 🔏 button beside the required user account.

3. At **Security Role**, select the role this user is to be added to.

4. **OPTIONAL**. At **Effective Date**, click the 🗓 <u>Calendar</u> link and select the first date the user can access this role. If no date is selected then access to this role is immediately granted.

5. **OPTIONAL**. At **Expiry Date**, click the 🗓 <u>Calendar</u> link and select the last date the user can access this role. If no date is selected then access to this role will not expire.

6. At **Send Notification?**, select from the following options:

   o Check ☑ the check box to send a notification email to the user informing them of their new role access. This is the default setting.

- Uncheck ☐ the check box to add the user to the role without notifying them.

7. Click the ✚ Add User to Role link.

8. Repeat Steps 3-7 to add this user to additional roles.

9. Click the ◀ Cancel link to return.

Deleting a User from a Security Role

How to delete a user from a security role using the User Accounts module.

1. Locate the required user using a filter or by performing a search.

2. Click the **Manage Roles** 🔒 button beside the required user account.

3. At **Send Notification?**, select from the following options:
   - Check ☑ the check box to send a notification email to the user informing them that they have been removed from the role. This is the default setting.
   - Uncheck ☐ the check box to delete role access without sending a notification email.

4. Click the **Delete** ✖ button beside the role the user is to be deleted from. This displays the message "Are You Sure You Wish To Delete This Item?"

5. Click **OK** to confirm deletion.

6. Repeat Steps 4-5 to delete this user from additional roles.

Forcing a Password Change

How to force a user to change their password next time they login to the site using the User Accounts module.

1. Find the required user using a filter or by searching.

2. Click the **Edit** ✏ button beside their user account.

3. Click the 🔒 Force Password Change link. This removes the Force Password Change link; checks ☑ the **Update Password** check box; and displays the message "User must update password on next login".

Managing a User Profile

How to manage all fields of a user's profile using the User Accounts module. Editable fields include address information, contact information, biography, time zone and preferred locale.

1. Find the user account to be edited using a filter or by searching.

2. Click the **Edit** ✎ button beside their user account.

3. Click the ▤ Manage Profile link.

4. Edit any fields as required.

5. Click the ◆ Update link.

Managing a User's Password

How to change or reset a user's password as well as view details regarding the user's current password settings using the User Accounts module.

1. Find the user to be edited using a filter or by searching.

2. Click the **Edit** ✎ button beside the required user account.

3. Click the ▦ Manage Password link.

4. The following details regarding the user's password are displayed:

   o **Password Last Changed**: Displays the date the password was last changed.

   o **Password Expires**: Displays the date the password will expire, if any.

5. To change the password, perform the following in the Change Password section:

   a. In the **New Password** text box, enter a new password.

   b. In the **Confirm Password** text box, re-enter the new password.

7. To reset the password, perform the following in the Reset Password section:

   a. Click the ⊞ Reset Password link. This generates a random password which is sent to the user's email address.

8. Click the ◀ Cancel link to return.

Managing User Account Settings

How to view and manage the settings applied to the User Accounts module. This task can be performed using either the User Accounts or Security Roles module.

1. Select ▦ **User Settings** from the User Accounts or the Security Roles module menu - OR - Click the ▦ User Settings link.

2. Go to the **User Account Settings** section.

3. For each of the below fields, set each column as visible (**True**) or hidden (**False**) on the User Account page:

   a. **Show Address Column**. This column is set as visible (True) by default.

b. **Show Authorized Column**. This column is set as visible (True) by default.

c. **Show Created Date Column**. This column is set as visible (True) by default.

d. **Show Name Column**. This column is set as visible (True) by default.

e. **Show Email Column**. This column is set as hidden (False) by default.

f. **Show First Name Column**. This column is set as hidden (False) by default.

g. **Show Last Login Column**. This column is set as hidden (False) by default.

h. **Show Last Name Column**. This column is set as hidden (False) by default.

i. **Show Telephone Column**. This column is set as visible (True) by default.

4. At **Default Display Mode**, select one of the following options to set the way the User Accounts page is displayed:

   ▪ **All**: All user accounts are displayed on the User Accounts module by default.

   ▪ **First Letter**: All user accounts for the first letter of the alphabet are displayed by default.

   • **None**: No user accounts are displayed on the User Accounts module by default.

5. At **Disable Results Paging**, select from these options:

   o **True**: Select to hide the page in the user accounts grid if only one page of records exists.

   o **False**: Select to display results paging regardless of the number of results.

6. At **Default Profile Visibility Mode**, select one of the following options to set the default visibility of user profiles:

   ▪ **All Users**: All users can view profiles by default.

   ▪ **Members Only**: Only registered users can view profiles by default.

   • **Admin Only**: Only Administrators can view profiles by default.

7. At **Display Profile Visibility**, select **True** to enable a user to override the Default Profile Visibility Mode as set at Step 6 - OR - Select **False** to remove this option.

8. At **Display Manage Services**, select **True** to display the Manage Services section in the Users profile - OR - Select **False** to hide it. This option is set as True by default.

9. In the **Users per Page** text box, enter the number of users to be displayed on each page. The default setting is 10.

10. In the **Display Name Format** text box, enter tokens to set the format of the users display name. Setting this option will remove the user's ability to edit their display name. Available tokens include [FIRSTNAME], [LASTNAME], [USERNAME].

11. In the **Email Address Validation** text box, modify the provided Email Validation Expression.

12. At **Users display mode in Manage Roles**, select one of the following display options for the User Name field on the Manage Roles page:

   ▪ **Combo Box**: User names are displayed in a drop down selection box. This is the default setting. Note: The Combo Box always displays using the user's display mode in Manage Roles field regardless of which option is set.

   ▪ **Text Box**: Displays a text box in which to enter a user name.

13. Click the Update link.

Setting the Login and Logout Options

How to set the login and logout options for your site. This task can be performed using either the User Accounts or Security Roles module.

1. Select **User Settings** from the User Accounts or Security Roles module menu - OR - Click the User Settings link.

2. Go to the **User Accounts Settings** section and set any of the following options:

   a. At **Redirect After Login**, select a page to redirect users to when they login to the site. To disable redirection choose the 'blank' option at the top of the pages list.

   b. At **Redirect After Logout**, select a page to redirect users to when they logout of the site. To disable redirection after login choose the 'blank' option at the top of the pages list. **NOT AVAILABLE: Redirect After Registration**

   c. **NOT AVAILABLE** At **Use CAPTCHA For Associating Logins**, select from these options:

      ▪ Select **True** to use the CAPTCHA security code with authentication methods (e.g. LiveID, OpenID) other than the default authentication method.

      ▪ Select False to only use CAPTCHA on the default authentication method.

   d. At **Require a Valid Profile for Login**, select from these options:

      ▪ **True**: Select to require users to update their profile during login if their profile no longer meets the requirements for a valid profile. E.g. If the required fields for a valid profile have changed since the user last logged in.

      ▪ **False**: Select if a valid profile is now required to login. This is the default setting.

3. Click the Update link.

Profile Properties

Managing Profile Properties

How to set the properties of the fields in the user profile using the User Accounts module.

1. Select **Manage Profile Properties** from the User Accounts module menu - OR - Click the Manage Profile Properties link. This displays the Manage Profile Properties page where you can perform any of the following management tasks.

Reordering Fields

- Click the **Down** button to move a field down one position on the profile page, and then click the Apply Changes link.

- Click the **Up** button to move a field up one position on the profile page, and then click the Apply Changes link.

Setting Fields as Required or Optional

1. At **Required**, select one or the following options:

   o Click on the check box located at the top of this column to set all fields at the same time as follows:

     o Check the check box to set all fields as required.

     o Uncheck the check box to set all fields as optional.

   o Check the check box beside a field to set it as mandatory on the User's Profile page. The user will be prompted to update this field when they edit their profile. Note: The field will only be required at Registration if set under User Settings. See "Setting Registration Options"

   o Uncheck the check box beside a field to set it as optional.

2. Click the Apply Changes link.

Setting Field Visibility

1. At **Visible**, select from the following options to set the visibility of fields on the Manage Profile page:

   o Click on the check box located at the top of this column to set **all fields** at the same time as follows:

     o Check the check box to set all fields are visible in the User Profile.

     o Uncheck the check box to set all fields as not visible in the User Profile.

- o Check ☑ the check box beside a field to set it as visible.

- o Uncheck ☐ the check box beside a field to set it as not visible.

2. Click the ◆Apply Changes link.

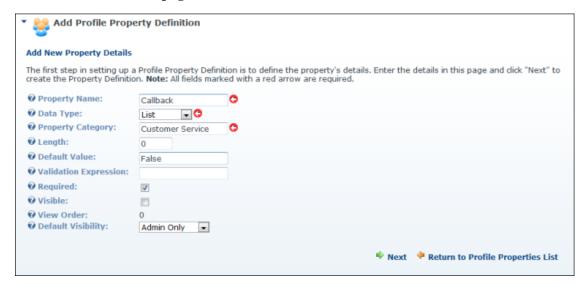### Refreshing the Profile Properties Grid

1. Click the ⟳ Refresh link located at the base of the module. This refreshes the grid with any recent updates.

Adding a Profile Property
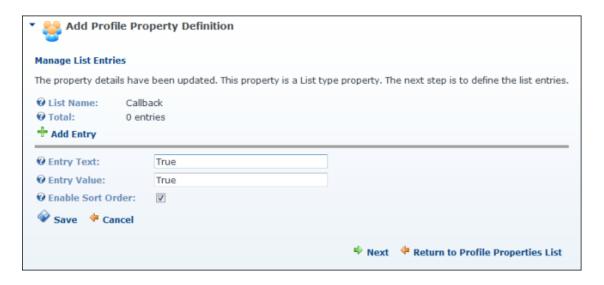
How to add a new property (field) to the user profile using the User Accounts module.

1. Select ▦ **Manage Profile Properties** from the module menu - OR - Click the ▦ Manage Profile Properties link.

2. Select ➕**Add New Profile Property** from the Manage Profile Properties menu - OR - Click the ➕ Add New Profile Property link. This opens the Add Profile Property Definition wizard.

3. On the Add New Property Details page complete the following:

   a. In the **Property Name** text box, enter a name for this property as it will appear on the Manage Profile page.

   b. At **Data Type**, select a data type from the following options: TrueFalse, Date, DateTime, Country, List, Locale, Page, Region, RichText, TimeZone, Integer, Text and Unknown.

   c. In the **Property Category** text box, enter the category that this property belongs to. This determined where it is displayed in the profile. Pre-existing categories are: Name, Address, Contact Info, Preferences.

   d. **OPTIONAL**. In the **Length** text box, enter the maximum character length for this field. This is only relevant to fields where users enter information such as Text and RichText data types.

   e. **OPTIONAL**. In the **Default Value** text box, enter the default value for this field.

   f. **OPTIONAL**. In the **Validation Expression** text box, enter a regular expression to validate data entered into this field.

   g. **OPTIONAL**. At **Required**, check ☑ the check box to set the field as required - OR - Uncheck ☐the check box to set it as optional.

   h. **OPTIONAL**. At **Visible**, check ☑ the check box to set the field as visible in the User Accounts module - OR - Uncheck ☐ the check box to hide it.

   i. **OPTIONAL**. In the **View Over** text box, enter the view order for this property.
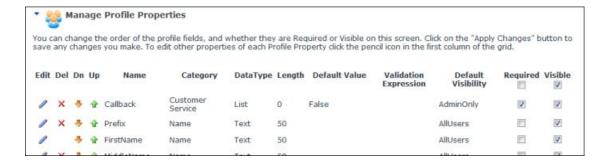
j. At **Default Visibility**, select one of the following options to set the default visibility of this property:

- **All Users**: All users can view this property by default.

- **Members Only**: Only registered users can view this property by default.

- **Admin Only**: Only Administrators can view this property by default.

k. Click the ⇨ Next link. This saves this information and opens the Manage List Entries page.

4. On the **Manage List Entries** page add the list entries for this property:

a. Click the ➕ Add Entry link. This displays the Add Entry fields.

b. In the **Entry Text** text box, enter the text to be displayed for this entry.

c. In the **Entry Value** text box, enter the value for this entry.

d. At **Enable Sort Order**, check ☑ the check box enable sort order to be modified - OR - Uncheck ☐ the check box to use the default order which is the order in which entries are saved.

e. Click the ◆ Save link.

5. Repeat Step 4 to add additional entries. Note: The Enable Sort Order field is only displayed when adding the first entry.

6. Click the ➡ Next link to manage localization and opens the Manage Localization page - OR - If localization isn't required, Skip to Step 9.

7. On the **Manage Localization** page, you can create different text for different languages. This requires you to have more than one language pack installed. Here's how to set the localized text for this property:

    a. At **Choose Language**, choose a language from the list of languages enabled on this portal.

    b. In the **Property Name** text box, edit the name of this property as it is displayed in the profile. For this example I have changed Prefix to Title.

    c. In the **Property Help** text box, edit the help for this property. For this example I have edited this text.

    d. In the **Required Error Message** text box, enter the error message to display for this field when the property is Required but not present.

    e. In the **Validation Error Message** text box, enter the error message to display for this field when the property fails the Regular Expression Validation.

    f. In the **Category Name** text box, enter the category name in the selected language.

    g. Click the 🔷 Save Localized Text link.

8. **OPTIONAL**. Repeat Step 7 to set localized text for other languages.

9. Click the ⬅ Return to Profile Properties List link to return to the Manage Profile Properties page where the new property is listed.

Manage Profile Properties

You can change the order of the profile fields, and whether they are Required or Visible on this screen. Click on the "Apply Changes" button to save any changes you make. To edit other properties of each Profile Property click the pencil icon in the first column of the grid.

Edit	Del	Dn	Up	Name	Category	DataType	Length	Default Value	Validation Expression	Default Visibility	Required	Visible
✎	×	⬇	⬆	Callback	Customer Service	List	0	False		AdminOnly	✓	✓
✎	×	⬇	⬆	Prefix	Name	Text	50			AllUsers	☐	✓
✎		⬇	⬆	FirstName	Name	Text	50			AllUsers	☐	✓

10. **OPTIONAL**. Move the property to the required position by clicking the **Down** ⬇ button repeatedly, and then click the ◆ Apply Changes link.

Edit User Accounts

👤 **Manage User Credentials** 🔒 **Manage Roles for this User** ▦ **Manage Password** 👤 Manage Profile

Edit Profile - Rose (Id: 3)

❓ **Callback**   False ▾ ⟲

❓ **Prefix:**

❓ **First Name:**   Rose

❓ **Middle Name:**

❓ **Last Name:**   Booth
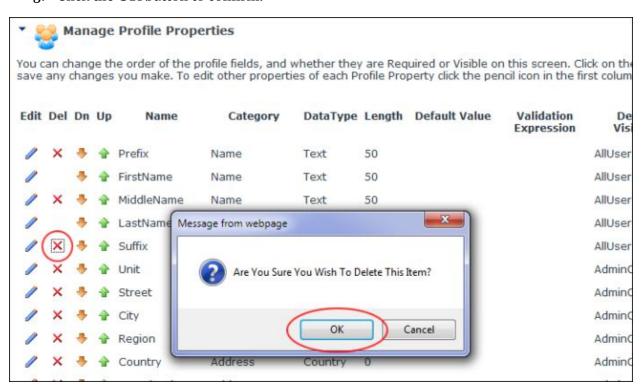
The new property displayed on the Manage Profile page

Deleting a Profile Property

How to delete a user profile property (field) using the User Accounts module.

1. Select 🔲 **Manage Profile Properties** from the User Accounts module menu - OR - Click the 🔲 Manage Profile Properties link.

2. In the **Del** column, click the **Delete** ✖ button beside the property to be deleted. This displays the message "Are You Sure You Wish To Delete This Item?"

3. Click the **OK** button to confirm.

Newsletters

About the Newsletters Module
The Newsletters module enables the Administrator to send bulk emails to all users belonging to one or more security roles and/or to one or more other defined email addresses. The module sends the newsletter to each recipient separately. Newsletters can be either plain text or HTML format, plus files and images can be attached to the email.
Once an email is sent, the Administrator will receive an email titled "Bulk Email Report for [Newsletter Subject]" containing the following details:
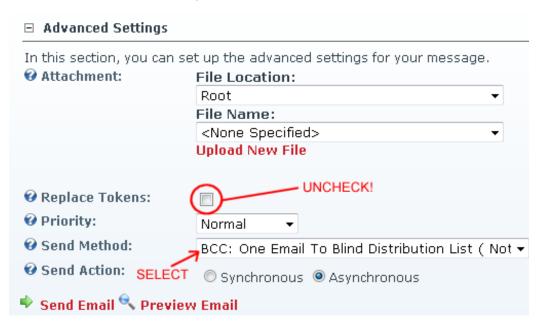
- The date and time when the bulk email operation commenced

- Number of Email Recipients

- Number of Email Messages

- The date and time when the bulk email operation was completed

Sending a Basic Newsletter
How to send a newsletter <u>without using</u> replacement tokens or personalization.

1. Go to the **Basic Settings** section and complete these fields:

   a. At **Addressees** complete one or both of these options:

      i. At **User Role(s)**, check ☑ the check box beside each of the roles to receive the newsletter. Note that users in multiple roles will only receive one copy of the newsletter.

      ii. In the **Additional Emails** text box, enter each of the email addresses to receive the newsletter separated by a semi-colon (;).
      e.g. john.black@domain.com;julie.black@domain.com

   b. **OPTIONAL**. In the **From** text box, enter/modify the email address to be displayed in the From field of this newsletter. If you are logged in to the site, the email address associated with your user account is displayed here by default.

   c. **OPTIONAL**. In the **Reply To** text box, enter the reply to email address for the email.

   d. In the **Subject** text box, enter a subject title for the email.

2. Go to the **Message** section and enter the body of the newsletter into the **Editor**. (Select Basic Text Box to send a plain text email - OR - Select Rich Text Box to send an HTML email with formatting and images).

3. **OPTIONAL**. Click the <u>Preview Email</u> link to preview the newsletter.

4. **OPTIONAL**. **Maximize** ⊞the **Advanced Settings** section to set any of the following optional settings:

   i. At **Attachment**, select the required attachment.

ii.   At **Replace Tokens?**, **uncheck ☐ the check box**.

iii.   At **Priority**, select the priority of the email (**High**, **Normal**, or **Low**) from the drop-down box. The default setting is Normal.

iv.   At **Send Method**, select **BCC: One Email To Blind Distribution List (Not Personalized)**.

v.   At **Send Action**, select from the following options:

i.   **Synchronous**: Emails are all sent before your page refreshes. This method is suitable for small mail outs of approximately 100 or less.

ii.   **Asynchronous**: This starts a separate thread (user process) to send emails. This method is suitable for large mail outs of approximately 100 or more.

5. Click the Send Email link. This displays either a **Successful** or **Not Successful** message. For Synchronous send action, the message doesn't display until after all emails have been sent. For Asynchronous send action, the message displays once the send action has successfully commenced.

The Bulk Email Report

When a bulk email is sent using the Newsletters module, the Administrator will receive an email titled "Bulk Email Report for [Newsletter Subject]" containing the following details:

- The date and time when the bulk email operation commenced

- Number of Email Recipients

- Number of Email Messages

- The date and time when the bulk email operation was completed

- Status Report listing any errors which occurred

- List of Recipients

From: host@ecozany.com
To: host@ecozany.com
Cc:
Subject: Bulk Email Report for 'EcoZany Newsletter - October 2011'.

Bulkmail Report

Operation started at: 7/12/2010 1:04:14 PM
EmailRecipients: 2
EmailMessages: 2
Operation completed: 7/12/2010 1:04:14 PM

Status Report:
No errors occured during sending.

Recipients:
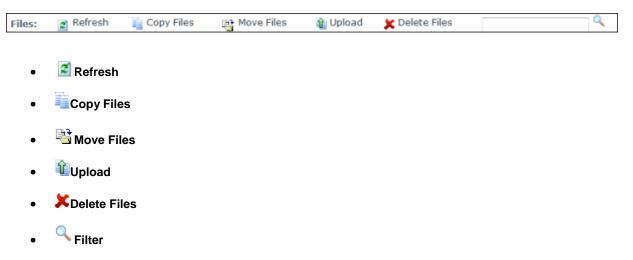admin@ecozany.com
rose.booth@ecozany.com

File Manager

About the File Manager Module

The File Manager Module enables the management of files on this site. This module allows authorized users to upload new files, download files, delete files, and synchronize the file upload directory. It also provides information on the amount of disk space used and available.
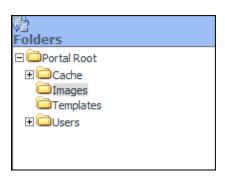
Folders Toolbar: Located at the very top of the File Manager, this toolbar enables the management of folders, as well as file synchronization. The Folders Toolbar includes the following tools:

- **Add Folder**

- **Delete Folder**

- **Synchronize Files** / **Recursive**:

Files Toolbar: Located below the Folders toolbar, this toolbar enable management of files within the selected folder. The File Toolbar includes the following tools:

- **Refresh**

- **Copy Files**

- **Move Files**

- **Upload**

- **Delete Files**

- **Filter**

Folder Explorer: Located on the left of the File Manager, the Folder Explorer enables users to navigate to folders using a hierarchical structure.

Files Window: This central window lists files within the selected folder. Note: Use the Files Navigation bar to access files not displayed. This section provides the following options:

- **Rename File**

- **Delete File**

- **Select All**: Click to select all files; or **UnSelect All**: Click to unselect all files.

- **Select File**: Select one or more individual files to perform any of the above tasks on the Files Toolbar.

- **Unzip File**

	File Name	Date		Size	
	CSS Properties.PDF	2/22/2011 12:33:46 PM	A	101,863	
	lc.jpe	3/3/2011 4:27:03 PM	A	16,418	
	logo.gif	2/17/2011 9:35:14 AM	A	5,082	
	network-tools.png	2/17/2011 12:42:42 PM	A	42,174	
	portal.css	2/14/2011 2:10:42 PM	A	3,617	
	WebAdministratorGuide.pdf	2/22/2011 12:37:26 PM	A	32	

Files Navigation Bar: This bar provides navigation and file display tools. It displays the Page [Page Number] of [Number of Pages]: enables the user to scroll through files when there are more items than displayed on one page. E.g. Page 1 of 5.

Page 1 of 3

Folder Information Bar: This information bar is located below the Folder Explorer and provides details related to the File Manager. The following information is displayed from left to right:

- Folder Address

- Used and Available Space

- Items Per Page: Select the number of Items (files) displayed in the Files Window. The default setting is ten (10) and this setting defaults back to ten (10) when the page is refreshed. Other options are: 15, 20, 30, 40, and 50.

Portal Root\Images\   Used: 3.30MB of [unlimited]   Items Per Page: 10

Folder Security Settings: This section enables Administrators to control security role access to each folder. Three basic levels of permission are available: Open Files in Folder, Browse Files in Folder, and Write to Folder.
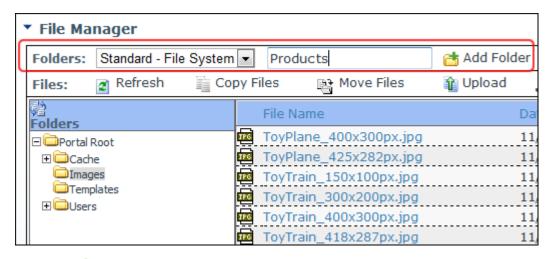
Adding a New Folder

How to add a new folder to the File Manager module. The new folder will inherit the permissions assigned to its parent folder.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the folder which will be the parent for the new folder.

3. On the Folders Toolbar, select one of the following options from the **Folders** drop-down list:

   o **Standard - File System**: Select this option to store most of your files. This is the default option.

   o **Secure - File System**: Select this option if you want to encrypt the file name to prevent direct linking to this file.

   o **Secure - Database**: Stores files as a byte array in the database rather than in the usual file system.

4. In the **Folders** text box, enter a name for the new folder.

5. Click the 📁 **Add Folder** button. This displays the new folder in the Folder Explorer.

Deleting a Folder

How to permanently delete empty folders from the File Manager.

Note: A folder cannot be deleted if it has any child folders, or if it contains any files. If you wish to keep files which are located within a folder which you are about to delete, you can move them to another folder.
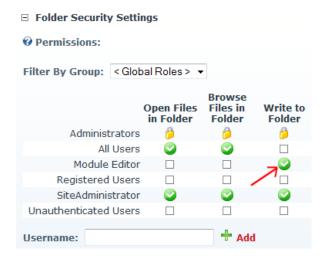
---

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the folder to be deleted. See "Navigating to and Selecting Folders"

3. Click the 🗑 **Delete Folder** button. This displays the message "Delete Folder: [Folder Location:Folder Name]?"

4. Click the **OK** button to confirm deletion.
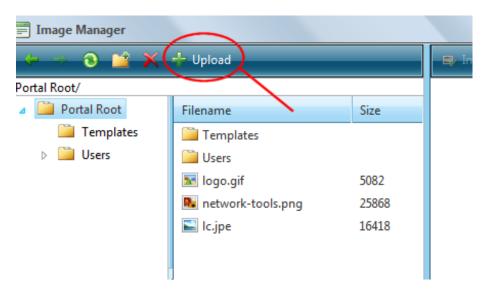
Overview of Folder Security Settings

The File Manager module enables authorized users to manage access to one or more folders within the File Manager by setting Folder Security Settings. Here's a description of the different permissions which can be set:

- **Open Files in Folder**: Enables authorized users to view the files within this folder which are displayed or linked to on the site. **All Users** are granted this permission by default.

- **Browse Files in Folder**: Enables authorized users to browse and select the files within this folder. Users are granted permission to their personal folder by default. This enables them to manage their profile image, etc.

- **Write to Folder**: Enables authorized users to perform all file management tasks for files within this folder.

IMPORTANT! You must grant **Write** permissions to any roles that will be managing module content within your web site – else the role user(s) will not be able to upload any files or create folders from modules which have access to the File Manager.

Although your role users which manage module content won't have direct access to the File Manager, various modules (such as the HTML module shown below) allow for uploading files into it (as well as create new folders). If write access is not granted to the role user the Upload and Add New Folder buttons will be disabled to them.

You can fine tune the various permissions to be folder specific. For example, you could not allow write access to the Portal Root directory, but yet have subfolders within it that have write permissions (other than the default personal folder for the user). Users are granted write permission to their personal folder by default. Personal folders are defined by a number (which is the user's actual ID number that is attached to their site user account – see sample below).

Portal Root/Users/005/05/5/

Note: users can ONLY see their individual folder in the **Users** directory – no one else's, however Administrators can see all user folders in the **Users** directory.
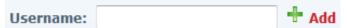
Assigning Folder Permissions by Role

How to assign permissions to manage a folder of the File Manager to users with one or more roles.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the folder to have permissions assigned. The name of the selected folder is displayed in the Folders Information Bar.

3. Go to the **Folder Security Settings** section. The current permission settings are displayed.

4. **OPTIONAL**. At **Permissions**, select **< All Roles >** from the Filter By Group drop-down box (if displayed) to view all available roles.

5. Check ☑ the check box in one or more columns to grant permissions to that role.

6. Click the ◈Update link.

Assigning Folder Permission to a User

How to assign access to view folders and upload to folders of the File Manager module.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the folder to have permissions assigned. The name of the selected folder is displayed in the Folders Information Bar.

3. Go to the **Folder Security Settings** section. The current permission settings are displayed.

4. At **Permissions**, enter the username of the user into the Username text box.

5. Click the <u>Add</u> link. This adds the user's name to the Permission role list.

6. Check ☑ the check box in one or more columns beside this user's name to grant them folder permissions.

7. Repeat Step 4-6 for to assign folder permission to additional users.

8. Click the ◆<u>Update</u> link.

Uploading Files

How to upload one or more individual files or a zipped (compressed) file to the File Manager module. These files can then be viewed using various modules such as Links, Media, HTML, etc.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select a folder that you are authorized to upload files to.

3. Click the 🔼 **Upload** button located on the Files toolbar. This opens the File Upload page.

4. Click the **Browse...** button and select a file from your computer.

5. **OPTIONAL**. At the drop-down box, change the folder which the file will be uploaded to. The default selection is the folder you chose at Step 1.

6. **OPTIONAL**. At **Decompress ZIP Files?**, select from the following options if you are uploading a zip file that you wish to decompress (unzip) during upload.

    o Check ☑ the check box to decompress the files while uploading them. This adds both the ZIP file and all the individual files to the selected folder.

    o Uncheck ☐ the check box to upload the file as a zipped folder. You can unzip the files at a later time if required.

7. Click the ◆ <u>Upload File</u> link. If upload is successful, the [FileName] Uploaded Successfully message is displayed.
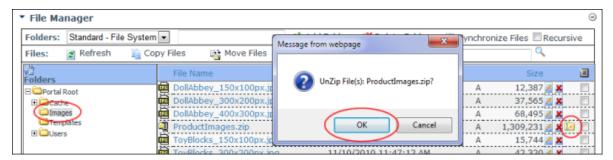
8. Repeat Steps 4-7 to upload additional files - OR - Click ⬅Return to return to the module.
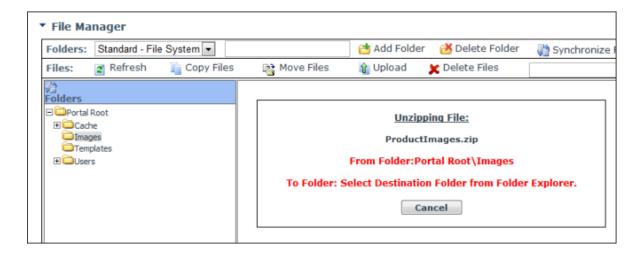
Unzipping Compressed Files

How to decompress a zipped folder of files (compressed files) within the File Manager module.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the Folder containing the file to be unzipped.

3. Click the **Unzip File** ⬚ button beside the file to be decompressed. This displays the message asking "UnZip Files(s): [FileName]?"

4. Click the **OK** button to confirm. This displays a message asking you to select the destination folder from the Folder Explorer.

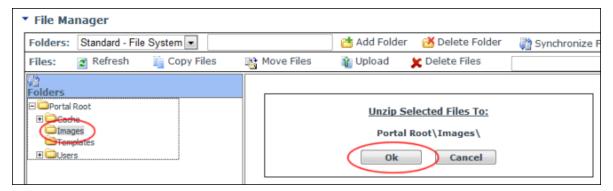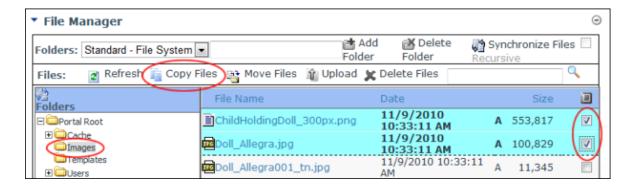5. Navigate to and select the folder you want to unzip the files to. This displays the Unzip Select Files To message. Note: If you wish to unzip the files into the folder where they currently reside, then you must click the folder name **twice**.

6. Click the **OK** button to confirm. The files are now unzipped in the selected folder. The original zip file is still located in the original folder.

Copying Files

How to copy one or more files from one folder to another folder of the File Manager module.

1. Navigate to Admin > **File Manager**.
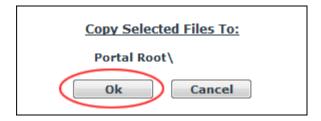
2. Navigate to and select the folder where the files to be copied are located.

3. In the Files Window, check ☑ the check box beside each of the files to be copied - OR - Click the **Select All** ☑ button to select all of the files displayed in the Files Window.

4. Click the ▤**Copy Files** button. This displays the "Copy Checked Files?" message.

5. Click the **Ok** button to confirm. This displays the Copying Files message which lists the names of the files to be copied and requests that you select the destination folder.

6. Navigate to and select the folder you want to copy the files to. Note: Files cannot be copied to the same folder. This displays the Copy Selected Files To message which displays the name of the selected folder.

7. Click the **Ok** button.

Moving Files

How to move one or more selected files from one folder into another folder within the File Manager module.

1. Navigate to Admin > **File Manager**.
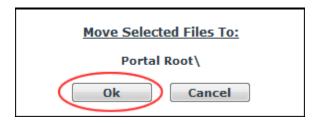
2. Navigate to and select the folder where the files to be moved are located.

3. In the Files Window, check ☑the check box beside each of the files to be moved - OR - Click the **Select All** ☑button to select all of the files displayed in the Files Window.

4. Click the 🔄 **Move Files** button. This displays the "Move Checked Files?" message.

5. Click the **Ok** button to confirm. This displays the Moving Files message which lists the names of the files to be moved and requests that you select the destination folder.

6. Navigate to and select the folder you want to move the files to. Note: Files cannot be moved to the same folder. This displays the Moving Selected Files To message which displays the name of the selected folder.
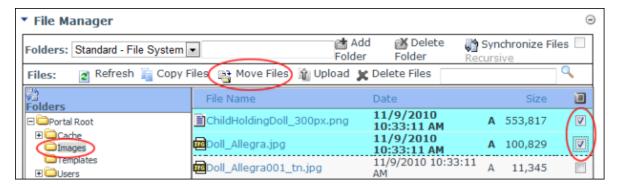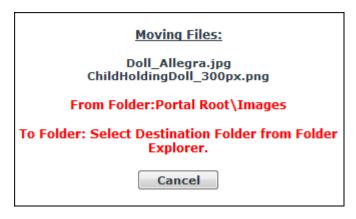
7. Click the **Ok** button.

Deleting a File

How to permanently delete a single file from the File Manager module.

1. Navigate to Admin > **File Manager**.

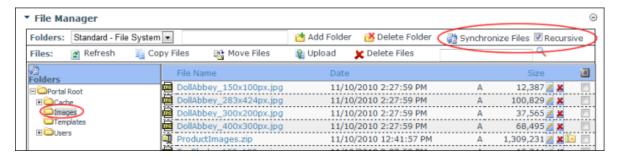2. Navigate to and select the folder containing the file to be deleted.

3. In the Files Window, navigate to the required file.

4. Click the **Delete File** ✖ button beside the file to be deleted. A message asking "Are You Sure You Wish to Delete The File [FileName]?" is displayed.

5. Click **OK** to confirm deletion.

Synchronizing Files within a Folder

How to synchronize the files inside one or more folders of the File Manager module. Synchronizing ensures the files listed match the files within the database. Use this feature when you wish to refresh the file list within multiple folders.

1. Navigate to Admin > **File Manager**.

2. Navigate to and select the folder to be synchronized.

3. **OPTIONAL**. At **Recursive**, check ☑ the check to synchronize all child folders of the selected folder.

4. Click the 📑 **Synchronize Files** button. The Folder Explorer is minimized when synchronization is completed.

Renaming a File

How to rename a file in the File Manager module.

WARNING. Renaming a file does not update any other references to this file across your site. e.g. If the file is an image displayed in the HTML module, then the path to the image will be broken and you are required to manually update the image. As such, it is recommended that you only rename a file when it is first uploaded and has yet to be used on the site.

1. Navigate to Admin > **File Manager**.

2. Click the **Rename File** ✎ button beside the file to be renamed.

3. In the **File Name** text box, enter a new name for the file.

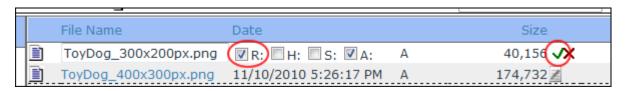4. Click the **Save Changes** ✔ button to save your changes.

Setting the Read Only Property of a File
How to set the read only property of a file in the File Manager module.

NOTE: Setting a file as Read Only does not prevent it from being deleted.

---

1. Navigate to Admin > **File Manager**.

2. Locate the required file.

3. Click the **Rename File** ✎ button beside the file to be edited.

4. At the **R** check box, select one of the following options:

   o Check ☑ the check box to set the file as read only.

   o Uncheck ☐ the check box to remove the read only property from the file.

5. Click the **Save Changes** ✔ button to save your changes - OR - Click the **Cancel Rename** ✘ button to cancel.

File Name	Date					Size	
ToyDog_300x200px.png	☑ R:	☐ H:	☐ S:	☑ A:	A	40,156	✔ ✘
ToyDog_400x300px.png	11/10/2010 5:26:17 PM				A	174,732	✎

H = Hidden (hidden files won't display on your site if you check this option)

S = (allow Indexing Service to index this file)

A = Archive (allow file to be archived by the operating system. **This is the default option**)

Important Uploading Note About File Names For Web Use
Your files will not render in a web browser if you have uploaded files (either documents or images) that do not meet the defined file naming conventions listed below. You can use the rename tool in File Manager to remove any of the following characters:

The following characters cannot be used in file names for web use:

= \ ` | ; / : " < > ? # ! $ % ^ *

Recycle Bin

About the Recycle Bin Module
The Recycle Bin module stores all pages and modules that have been deleted from the site.
These pages and modules can be restored to the portal or permanently removed.

The Pages Window

- Pages are listed in the Recycle Bin by page name

- Pages are listed in the order that they were deleted from most recently deleted to first deleted

The Modules Window

- Modules are listed in the Recycle Bin by page name - module title. E.g. Home - Announcements

- Modules are listed in the order that they were deleted from most recently deleted to first deleted

Restoring Modules and Pages

- Restoring a page will restore it to its previous location on the site menu. All modules (including content) will also be restored.

- A module (including content) is restored to a selected page

Deleting Modules and Pages
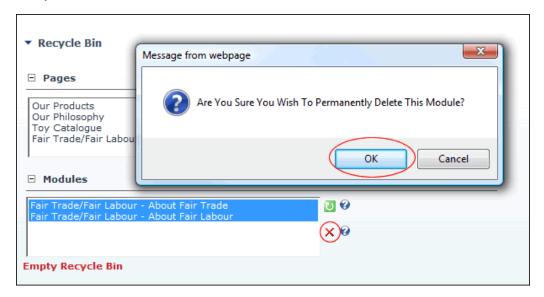
- Deletion is permanent

- Page deletion includes modules and content

- Module deletion includes content

Tip: ***It is recommended that unwanted pages and modules be regularly deleted from the recycle bin****. This will ensure that the Recycle Bin doesn't become so large that Administrators must search through a large number of modules and pages to find the required item.*

Deleting Modules from the Recycle Bin

How to permanently delete one or more modules (including module content) from your site using the Recycle Bin module.

1. Go to the Recycle Bin module.

2. In the **Modules** window, select one or more modules.

3. Click the **Delete** ✕ button. This displays the message "Are You Sure You Wish To Permanently Delete This Module?"

4. Click **OK** to confirm deletion.

Deleting Pages from the Recycle Bin

How to permanently delete one or more pages (including modules and module content) from your database using the Recycle Bin module.
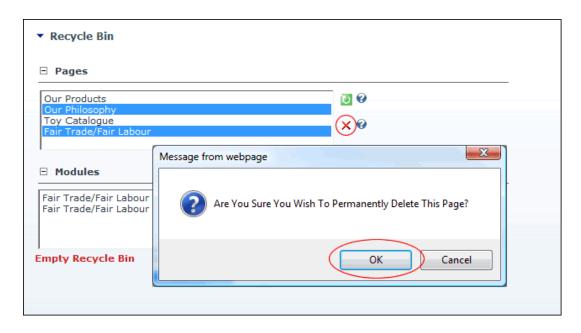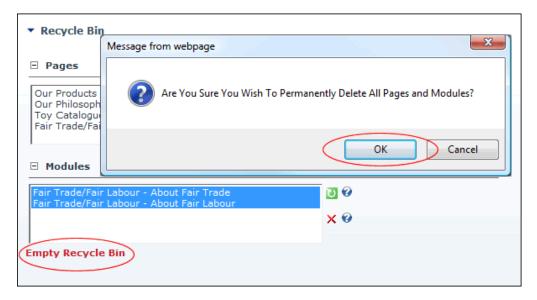
1. In the **Pages** window, click on the name of each page to be permanently deleted.

2. Click the **Delete** ✕ button. This displays the "Are You Sure You Wish To Permanently Delete This Page" message.

3. Click **OK** to confirm deletion.

Emptying the Recycle Bin

How to permanently delete all pages and modules from the Recycle Bin module.

1. Click the <u>Empty Recycle Bin</u> link. This displays the message "Are You Sure You Wish To Permanently Delete All Pages and Modules?"

2. Click the **OK** button to confirm deletion.

Restoring Deleted Modules

How to restore one or more deleted modules (including module content) to their original page using the Recycle Bin module.

1. In the **Modules** window, click on the name of each module to be restored.

2. Click the **Restore** ⟳ button.

Restoring Deleted Pages

How to restore one or more deleted pages to the site using the Recycle Bin module.
This restores the selected pages including any modules and module content on those pages prior to deletion. The pages are restored to their previous location in the pages list and site menu.

This restores the selected pages including any modules and module content on those pages prior to deletion. The pages are restored to their previous location in the pages list and site menu.

Tip: You cannot restore a page whose parent page has also been deleted unless you restore the parent page first.

1. In the **Pages** window, click on the name of each page to be restored.

2. Click the **Restore** ⟳ button.

Google Analytics

About the Google Analytics Module
The Google Analytics module is located on the Admin >Google Analytics page. This module enables Administrators to analyze and improve online search results.

What Is Google Analytics and why should I consider using it?
Taken directly from the Google Analytics site (http://www.google.ca/analytics/), Google Analytics is...
"...the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible and easy-to-use features now let you see and analyze your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives and create higher converting web sites."
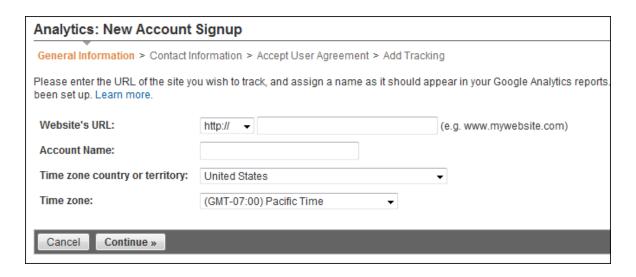
How do I get an account?

1. Go to http://www.google.ca/analytics/.

2. Click the Sign Up Now link and follow the prompts.

3. Once you gain access to the Google Analytics dashboard, go ahead and create an account for your site. Here are different pathways for new users and existing Google Analytics users.

New Users

1. At **My Analytics Accounts** (located on the top right) select "Create New Account" from the drop-down box and then click the **Sign Up** button. This displays the "Analytics: New Account Signup" page.

2. Complete the "Analytics: New Account Signup" information as per your requirements, along with the Contact Information, and User Agreement pages.
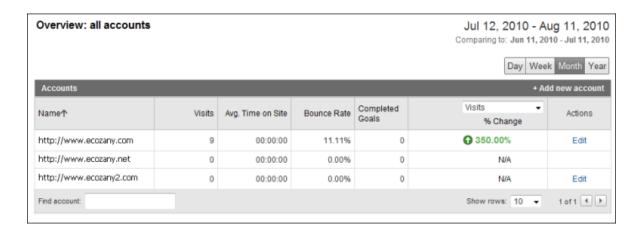
3. Once complete, you will end up on the "Add Tracking" page, which should resemble something similar to the below image. The single most important piece of information on this page is the Tracking ID, based on the above screen shot our new Tracking ID is: "UA-17965093-1". Copy this down in a safe place.
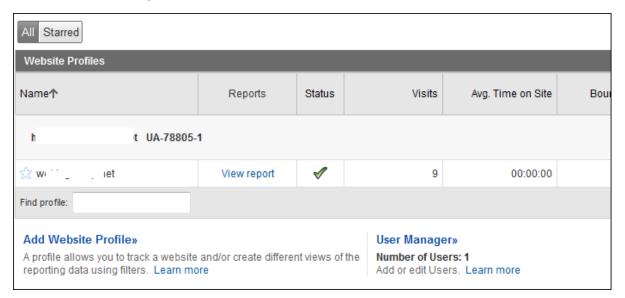
Existing Users

1. Existing Users should see their account on the home page of Google Analytics, something similar to this image:

2. Under the Name field, click the relevant Domain which you need to start tracking. It should switch over, and now the Name field includes the URL along with the tracking code to the right. Similar to:

3. As you can see above, the tracking code is "UA-78805-1", copy this down into a safe place. You are now ready to begin "Setting Google Analytics"

Setting Google Analytics

How to configure Google Analytics for your site. You must sign up for a Google Analytics account to complete this tutorial.

1. Go to the **Google Analytics** module.

2. In the **Tracking ID** text box, enter the web site tracking ID that you obtained from Google when you signed up for an account.

3. **OPTIONAL.**In the **URL Parameter** text box, enter the Javascript code fragment that will be passed as a parameter to the page tracker (used to customize the value tracked in Google Analytics instead of the default location.href value).

From this point forward you will be able to access various daily reports on the Analytics site regarding your web site's activity.

Modules

About Modules

Your web site uses a modular design system to display content on a page. One or more modules are added to each site page to create and manage your site's content. There are many different types of modules, each managing a different type of site content.
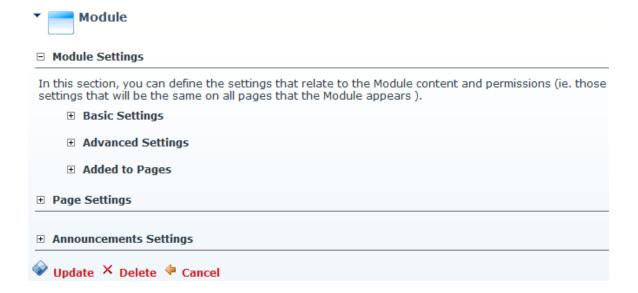
Role Based Access

Access to view and manage the content (modules) and settings of all portals is controlled using role based access. By associating a user's account with one or more roles (also called Security Roles) you can permit or deny them access to view and/or edit site modules. For more info regarding Security Roles see the *Managing Your Security Roles* section.
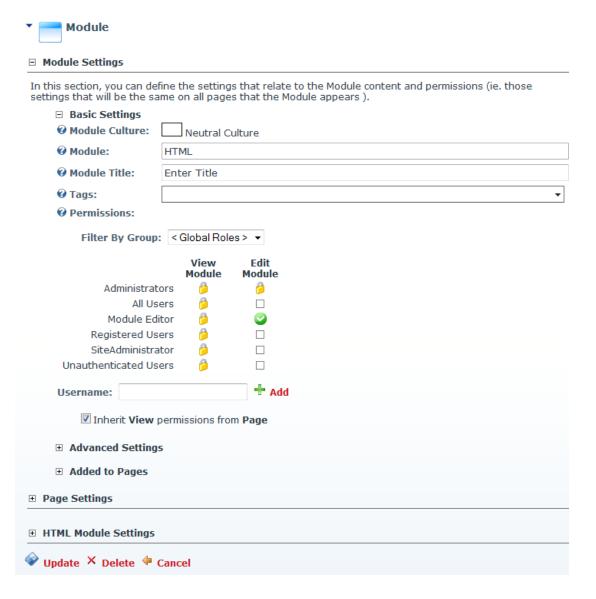
All modules have a Settings page which is accessed by clicking the Settings option in the module menu, or by clicking the **Settings** button at the base of the module. The Module Settings page enables authorized users to modify basic module settings related to the module content (e.g. module title, module header and footer, module start and end dates) and module permissions (e.g. which roles are able to view and edit a module). This page also controls more advanced settings related to the design of the module (containers, borders, printing) and site wide module settings.

The settings page is divided into these three major sections:

- **Module Settings**: Settings relating to the Module content. Module Settings are settings which are the same on all pages where the Module appears. This section includes module permissions where access to view, edit and manage the module is set. Some modules have additional permissions to add/edit and manage module content. This section is divided into Basic Settings, Advanced Settings and Added to Pages.

- **Page Settings**: Settings specific to this particular occurrence of the module for this page. This section is divided into Basic Settings and Advanced Settings.

- **Module Specific Settings**: Several modules have additional settings which are specific to this module type. This section is typically named according to the module type. E.g. This section is named *Links Settings* on the Links module. Modules which have specific settings include the Announcements, Documents, Events, FAQs and several others.

▾ ▭ **Module**

⊟ **Module Settings**

In this section, you can define the settings that relate to the Module content and permissions (ie. those settings that will be the same on all pages that the Module appears).

    ⊟ **Basic Settings**

❷ **Module Culture:** ☐ Neutral Culture

❷ **Module:** HTML

❷ **Module Title:** Enter Title

❷ **Tags:** ▾

❷ **Permissions:**

Filter By Group: < Global Roles > ▾

	View Module	Edit Module
Administrators	🔒	🔒
All Users	🔒	☐
Module Editor	🔒	✅
Registered Users	🔒	☐
SiteAdministrator	🔒	☐
Unauthenticated Users	🔒	☐

Username: [＿＿＿＿＿] ➕ **Add**

☑ Inherit **View** permissions from **Page**

⊞ **Advanced Settings**

⊞ **Added to Pages**

⊞ **Page Settings**

⊞ **HTML Module Settings**

◆ **Update** ✕ **Delete** ⬅ **Cancel**

About the Module Menu

An overview of the tools available from the module menu, also known as the module action menu. This menu enables users with the correct permissions to add and edit module content, delete or move modules. The menu also provides access to the Module Settings page where users can set module specific setting such as view and edit permissions and design settings can be configured.
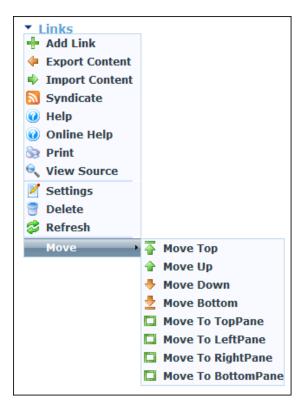
Function of Menu Icons

Icon	Name	Function
	Add/Edit [Item]	Add a new record to the module or edit the existing content.
	Export Content	Export content from the module. This content can then be imported to a new instance of the same module type. This option is not available on all modules.
	Import Content	Import content to the module. Content must first be exported from another instance of the same module type. This option is not available on all modules.
	Syndicate	The Syndicate option enables users to view a syndicated feed of the module content. This feed can be downloaded to your computer or displayed in another module such as the News Feeds (RSS) module. Syndication must be enabled on the Module Setting page of a module.
	Settings	Opens the module settings page for this module.
	Delete	Delete the module. Administrators are able to restore modules from the Recycle Bin.
	Refresh	Refreshes the module with the latest content.
(None)	**Move**	Move the module to a new pane on the current page, or to a new position within the current pane.

Opening the Module Menu

How to open the Module Menu, also known as the Module Action Menu.

Tip: If the Control Panel is displayed, ensure Mode is set to Edit.

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1.   Mouse over the ▼ module menu (located at module name). This opens the drop-down menu. The range of actions displayed will depend upon your permissions access to the module.

Exporting Module Content

How to export module content. Exported content can then be imported it into another module of the same type. E.g. You can only import content from a Links module into another Links module. Modules which allow content import/export are known as IPortable modules. Examples include the Announcements, FAQs, Help, Links, Media, Survey, HTML modules.

1. Select ⬅**Export Content** from the ▼module menu. This opens the Export Module page.

2. At **Folder**, select the folder where you want to save the exported content.

3. In the **File** text box, enter a name for the export file. Note: The module type is entered by default. It is useful to keep this as the start of the file name so you can easily identify the module type in the future. E.g. Links_Sponsors_December2011

4. Click the Export link. This creates an XML file which is saved to the selected folder.
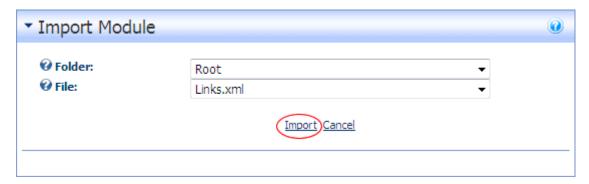
Importing Module Content

How to import module content. Before importing content, it must first be exported from a module of the same type. E.g. You can only import content from a Links module into another Links module. Modules which allow content import/export are known as IPortable modules. Examples include the Announcements, FAQs, Help, Links, Media, Survey, HTML modules.

1. Select ➡️ **Import Content** from the ▼ module menu. This opens the Import Module page.

2. At **Folder**, select the folder where exported file is located from the drop-down list.

3. At **File**, select the file name from the drop-down list.

4. Click the Import link.

Tip: If the module already contains content, the imported content is merged with the existing content.
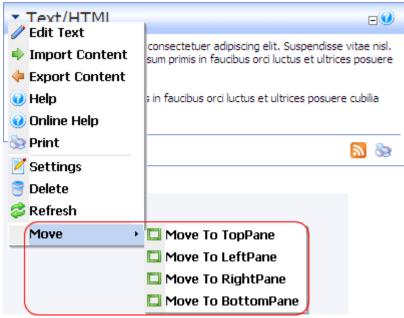
Moving a Module to a New Pane

How to move a module to another pane on the same page.

1. Mouse over the ▼ module menu.

2. Mouse over the **Move** option.

3. Select **Move To [PaneName]** from the available options. The pane names and number of panes listed depends upon the panes included in the skin set for this page. Typical options are:

   - **Move To TopPane**

   - **Move To LeftPane**

   - **Move To ContentPane**

   - **Move To RightPane**

   - **Move To BottomPane**
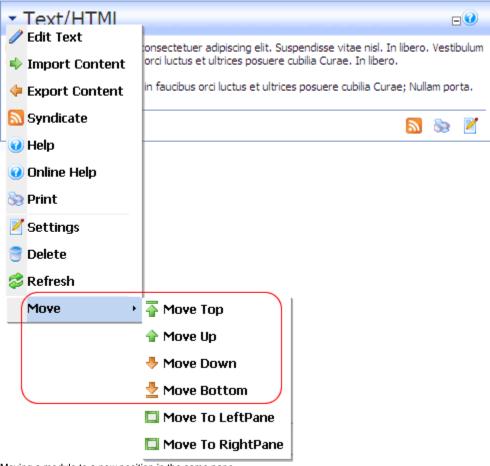

Moving a Module to a New Pane

Moving Module Position in Same Pane
How to move a module to a new position in the same pane.

1. Mouse over the ▼ module menu.

2. Mouse over the **Move** option.

3. Select a **Move [Position]** from the available options. These options depend upon the number of modules located in the pane. Typical options are:

   - **Move Top**: Moves the module to the top position in this pane

   - **Move Up**: Moves the module down one position in this pane

   - **Move Down**: Moves the module down one position in this pane

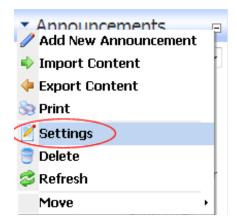   - **Move Bottom**: Moves the module to the bottom position in this pane

Moving a module to a new position in the same pane

Viewing/Editing Module Settings

How to access the Module Settings page of any module. This page provides Administrators with access to configure a wide range of module options such as permissions, design and layout. NOTE: these settings will not be accessible to your module content editors if their role is not defined for edit permissions in the page permissions, which is how you should set it up.

Tip: Ensure Mode is set to Edit on the Control Panel.

1. Select ✏️ **Settings** from the ▼ module menu - OR - Click the **Settings** ✏️ button (generally located in the bottom right corner of the module).

2. This opens the Module Settings page.

3. Edit one or more settings as required.

4. Click the 🔷 Update link.

Basic Settings

Setting the Module Title

1. In the **Module Title** text box, edit the module title, or you can delete it and not use a title.

2. Click the 🔷 Update link.
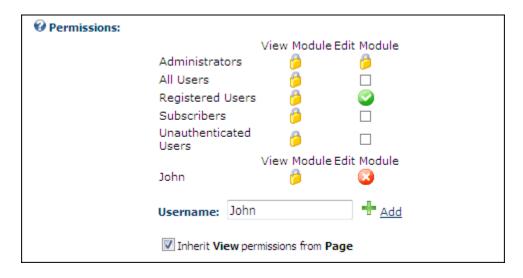
Setting Module Permissions

How to set permissions to view and edit a module. Permission can be granted or denied for a role or for an individual user.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. Go to the **Module Settings - Basic Settings** section.

3. Go to the **Permissions** field and select from the following options.

4. **OPTIONAL**. In the **Username** text box, enter the username of a user to whom you wish to grant or deny module permissions, and then click the ➕Add link. Repeat for additional usernames.

5. **OPTIONAL**. At **Filter By Group**, select from the following options:

   o **< All Roles >**: Select to view all roles (both global and group roles) in one single list.

   o **< Global Roles >**: Select to view all roles which are not associated with a Role Group. This includes Administrators, All Users, Registered Users, and Unauthenticated Users.

   o **[Role Name]**: Select the name of a Role Group to view the roles within that group.

6. **OPTIONAL**. At **Inherit View permissions from Page**, select from these options:

   o Check ☑the check box if the users which are authorized to view this module should be the same as the page it is located on. This displays the 🔒Security Roles image in the View Module column indicating that the view security is 'locked'. Skip to step 8.

   o Uncheck ☐the check box to set different permissions for viewing this module than set for the page it is located on. If you choose to uncheck this option, the check boxes at View Module will become available.

7. In the **View Module** column, by default all role checkboxes are locked as they are inheriting the page view permissions (see *Uncheck* in above step #6). Click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:

   o ☐**Not Specified**: Permissions are not specified. Users cannot view the module unless they belong to another role/username which has been granted permission.

   o ✅**Permission Granted**: Users can view the module.

   o ❌**Permission Denied**: Users cannot view the module.

8. In the **Edit Module** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:

   o ☐**Not Specified**: Permissions are not specified. Users cannot edit content unless they belong to another role/username which has been granted permission.

   o ✅**Permission Granted**: Users can edit content.

   o ❌**Permission Denied**: Users cannot edit content.

9. Click the ◆Update link.

Tip: When setting Permissions, you can change the selection at Filter By Group and set permissions for any of the related roles before updating.

For Example: In the below image, permission to view the module are inherited from the page and permission to edit the module has been granted to **Registered Users**, apart from the user with the username John (a member of the Registered Users role).
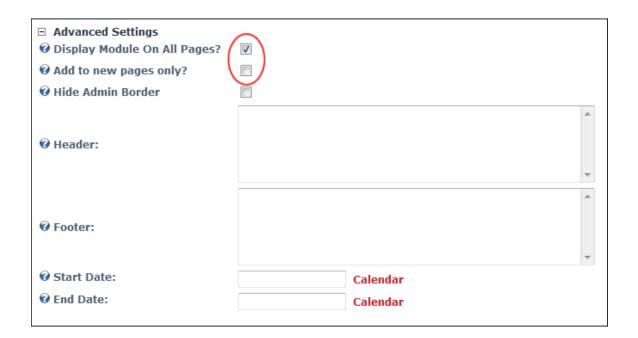
Advanced Settings

Displaying Module on all Pages
How to enable or disable a module displaying on all pages. Module content is shared therefore changes made on one instance of the module are reflected on all instances of the module. You can optionally set the module to only display on new pages. In this case the module isn't displayed on existing pages, apart from the page it is current displayed on.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. Go to the **Module Settings** section.

3. **Maximize** ⊞ the **Advanced Settings** section.

4. At **Display Module On All Pages?**, select from these options:

   o Check ☑ the check box. This displays the **Add To New Pages Only?** field.

      a. **OPTIONAL**. At **Add To New Pages Only?**, select from these options:

         ▪ Check ☑ the check box to only add the module to new pages which are added to the site.

         ▪ Uncheck ☐ the check box to add the module to both existing and new site pages.

   o Uncheck ☐ the check box to disable.

5. Click the ◆ Update link.

Tip: You can delete an instance of the module from a page without affecting this setting.

Setting a Module Header

OPTIONAL. How to add, edit or delete the header text which displays above the module content. Either plain text or HTML formatting such as headings, italic and bold can be used.

Tip: The header remains visible when the module is minimized.

1. Select ✏ **Settings** from the ▾ module menu - OR - Click the **Settings** ✏ button.

2. Go to the **Module Settings** section.

3. Maximize ⊞ the **Advanced Settings** section.

4. In the **Header** text box, add, edit or delete the header text as desired.
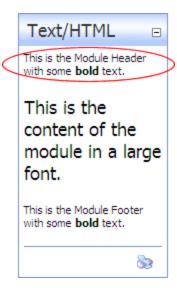
5. Click the ◆Update link.

Setting a Module Footer

OPTIONAL. How to add, edit or delete footer text which appears below the module content. Either plain text or HTML formatting such as headings, italic and bold can be used.

Tip: The footer remains visible when the module is minimized.

1. Select ✏ **Settings** from the ▾ module menu - OR - Click the **Settings** ✏ button.

2. Go to the **Module Settings** section.

3. Maximize ⊞ the **Advanced Settings** section.

4. In the **Footer** text box, add, edit or delete the footer text as desired.
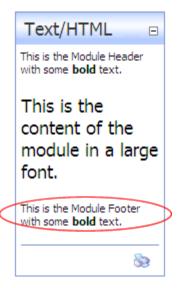
5. Click the ◆ Update link.

Setting Module Start Date

OPTIONAL. How to set the first day that a module is visible on a page. This allows you to create module content in advance.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. Go to the **Module Settings** section.

3. **Maximize** ⊞ the **Advanced Settings** section.

4. At **Start Date**, click the <u>Calendar</u> link and select the first day that the module will be visible on the site

5. Click the ◆<u>Update</u> link.

Setting Module End Date

OPTIONAL. How to set the expiry date for a module. The module will still be visible to Administrators after the end date enabling them to retain, edit and republish the content as desired.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. Go to the **Module Settings** section.

3. **Maximize** ⊞ the **Advanced Settings** section.

4. At **End Date**, click the <u>Calendar</u> link and then select the last day that the module will be visible on the site

5. Click the ◆<u>Update</u> link.

Added to Pages

Viewing Added To Pages List

How to view a list of the pages where a module is located. This setting includes a link to view the module on any of the listed pages.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. Go to the **Module Settings** section.

3. **Maximize** ⊞ the **Added To Page** section. This displays a hierarchical list of all pages (apart from the current page) where this module is located.

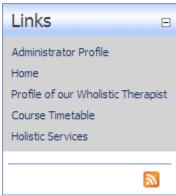4. Click on the linked [<u>Page Name</u>] to view the module on that page.

Page Settings

Basic Settings

Setting Module Background Color

How to set the background color of a module.

Tip: The look of this setting is dependent on the design of the module container applied to the module.

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1. Select ✏️ **Settings** from the ▾module menu - OR - Click the **Settings** ✏️ button.

2. **Maximize** ⊞the **Page Settings** section.

3. Go to the **Basic Settings** section.

4. In the **Color** text box, enter a color name or hex number. E.g. Navy or #CFCFCF. Find Color code charts at http://www.w3schools.com/Html/html_colors.asp

5. Click the 🔷Update link.

Module with background color set

Setting Visibility of Module Content

How to enable or disable the Maximize/Minimize button on a module. This button is typically displayed in top right corner of the module container. When content is minimized only the module title, header and footer are visible. **IMPORTANT**: The **Display Container?** setting must be checked to enable this function. If it is not, the Maximize/Minimize button cannot be viewed.

1. Select ✏️ **Settings** from the ▾module menu - OR - Click the **Settings** ✏️ button.

2. **Maximize** ⊞the **Page Settings** section.

3. Go to the **Basic Settings** section.

4. At **Collapse/Expand**, select from the following options:

   o **Maximized**: Module content is displayed (maximized) and the **Minimize**⊟ button is displayed.

- o **Minimized**: Module content is hidden (minimized) and the **Maximize**⊞ button is displayed.
- o **None**: Module content is displayed. No button is displayed.
5. At **Display Container?**, check ☑the check box to display the module container.
6. Click the ◆Update link.

Enter Title ⊟

Module Header

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Donec ipsum. Ut molestie tincidunt diam. Nulla consequat.

Module Footer

Maximized (Expanded) Content

Enter Title ⊞

Module Header
Module Footer

Minimized (Collapsed) Content

Setting the Module Container

How to set the decorative container on a module.

At Module Container, select the name of the module container you want to use on this module from the drop down list. NOTE: the default selection of <None Specified> will apply the Page skin's default container.

Optional. Click the Preview link to view the module with this container applied in a new browser window.
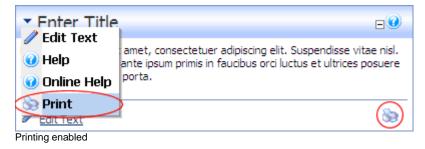
Module Container: 🛈 <None Specified> ▼ Preview

** To not display a container, simply uncheck ☑ the check box at Display Container?

Setting Module Printing

How to set the visibility of the print button. This button enables users to print the module content and is typically located in the bottom right corner of a module.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. **Maximize** ⊞ the **Page Settings** section.

3. Go to the **Basic Settings** section.

4. At **Allow Print?**, select from the following options:

   o Check ☑the check box to display the **Print** button and allow printing

   o Uncheck ☐the check box to hide Print button and disallow printing.

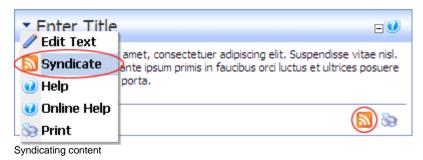5. Click the ◆Update link.

Printing enabled

Setting Module Syndication

How to enable or disable the RSS button on the module. Enabling syndication enables users to create a XML syndication of module content. The Syndication icon typically displays on the bottom right corner of the module and is also displayed on the module menu.

1. Select ✎ **Settings** from the ▾ module menu - OR - Click the **Settings** ✎ button.

2. **Maximize** ⊞the **Page Settings** section.

3. Go to the **Basic Settings** section.

4. At **Display Container?**, check ☑the check box to display the module container.

5. At **Allow Syndicate?**, select from the following options:

   o Check ☑the check box to display the RSS button and allow syndication

      o   Uncheck ☐the check box to hide RSS button and disallow syndication.

6. Click the ◆Update link.

Syndicating content

Cache Settings

Setting Module Cache Time **NOT AVAILABLE**

Advanced Settings

Setting the Default Page Settings for a Module

How to set the Page Settings on this module as the default settings for all new modules. You can optionally set these settings for all existing modules.

1. Select 🖊 **Settings** from the ▼module menu - OR - Click the **Settings** 🖊 button.

2. **Maximize** ⊞the **Page Settings** section.

3. **Maximize** ⊞the **Advanced Settings** section.

4. At **Set As Default Settings?**, check ☑the check box to use these page settings for all new modules.

5. **OPTIONAL.** At **Apply To All Modules?**, check ☑the check box to apply these page settings to all existing modules.

6. Click the ◆Update link.

Applying Page Settings to Existing Modules

How to apply the Page Settings for this module to all existing modules on the site.

1. Select 🖊 **Settings** from the ▼module menu - OR - Click the **Settings** 🖊 button.

2. **Maximize** ⊞the **Page Settings** section.

3. **Maximize** ⊞the **Advanced Settings** section.

4. At **Apply To All Modules?**, check ☑the check box to apply these page settings to all existing modules.

5. Click the ◆Update link.

Moving a Module to another Page

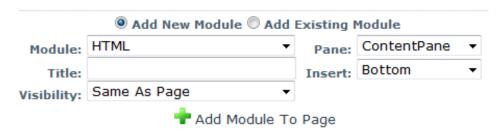How to move a module to another page in the site.

⊘ Move To Page: Home   ▾

1. Select 🖉 **Settings** from the ▾module menu - OR - Click the **Settings** 🖉 button.

2. **Maximize** ⊞ the **Page Settings** section.

3. **Maximize** ⊞ the **Advanced Settings** section.

4. At **Move To Page**, select the name of the page where you want to move the module to from the drop-down list.

5. Click the ◆Update link.

Adding a New Module

How to add a new module to a page using the Control Panel. Adding a new module inserts a module without any content into the current page.

Tip: You must be authorized to deploy a module and have the appropriate page editing permissions to add a module to a page.

1. Maximize ⌄ the Control Panel (at top of page)

◉ Add New Module ◯ Add Existing Module
Module: HTML   ▾   Pane: ContentPane ▾
Title: [   ]   Insert: Bottom   ▾
Visibility: Same As Page   ▾
➕ Add Module To Page

2. Go the center section and select **Add New Module**.

3. At **Module**, select the module to be added. (e.g. HTML)

4. **OPTIONAL.** In the **Title** text box, enter a Title for the module. (e.g. Products) If no title is entered, the name of the module is used by default. (e.g. Text/HTML)

5. **OPTIONAL**. At **Visibility**, select from the following options:

   o **Same As Page**: This sets the module as visible to all roles/users who can view this page. This is the default setting.

   o **Page Editors Only**: The sets module as only visible only to the roles/user who can edit this page. Select this option if you want to add content and configure the module settings before others can view the module.

6. **OPTIONAL**. At **Pane**, select the pane you want to insert the module into. The module is added to the Content Pane by default. The names of other panes will depend upon the skin applied to this page. If you select a pane other than the Content Pane, the position of the pane is briefly shown on the page.

7. **OPTIONAL**. At **Insert**, select the placement of the module from the first drop-down box. One or more of the following options is available, depending on the number of modules located in the selected pane:

   o **Top**: Select to add the module above all existing modules within the selected pane. Skip to Step 9.

   o **Above**: Select to add the module above another chosen module within the selected pane.

      a. At **Module**, select the module the new module will be added above.

   o **Below**: Select to add the module below another module within the selected pane.

      a. At **Module**, select the module the new module will be added below.

   o **Bottom**: This adds the module below all existing modules within the selected pane. This is the default option.

8. Click the **Add Module To Page** button.

Adding an Existing Module

How to add an existing module to the current page using the Iconbar. The module content is shared so if you update the content on one module the content in the other module also updates.

NOTE: You cannot add an existing module to the page where it already exists.

1. Maximize ⌄ the Control Panel (at top of page).

2. Go the Module Insertion section and select **Add Existing Module**.

3. At **Page**, select the page where the existing module is located.

4. At **Module**, select the module to be added.

5. **OPTIONAL**. At **Visibility**, select from the following options:

   o **Same As Page**: This sets the module as visible to all roles/users who can view this page. This is the default setting.

   o **Page Editors Only**: The sets module as only visible only to the roles/user who can edit this page. Select this option if you want to add content and configure the module settings before others can view the module.

6. **OPTIONAL**. At **Pane**, select the pane you want to insert the module into. The module is added to the Content Pane by default. The names of other panes will depend upon the design skin applied to this page. If you select a pane other than the Content Pane, the position of the pane is briefly shown on the page.

7. **OPTIONAL**. At **Insert**, select the placement of the module from the first drop-down box. One or more of the following options is available, depending on the number of modules located in the selected pane:

   o **Top**: Select to add the module above all existing modules within the selected pane. Skip to Step 9.

   o **Above**: Select to add the module above another chosen module within the selected pane.

       a. At **Module**, select the module the new module will be added above.

   o **Below**: Select to add the module below another module within the selected pane.

       a. At **Module**, select the module the new module will be added below.

   o **Bottom**: This adds the module below all existing modules within the selected pane. This is the default option.

8. Click the Add Module To Page button.

Deleting a Module

How to delete a module from a page.

Tip: Deleted modules are stored in the Recycle Bin.

---

1. Select ⬚ **Delete** from the ▾ module menu. This displays the message "Are You Sure You Want To Delete This Module?"

2. Click the **OK** button to confirm.

Adding Module Content

How to add content to a module – see the **Guide To Module Administration** manual for detailed instructions regarding specific modules.