iAPPS Content Manager® User Guide

Version 4.8

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1 ABOUT THIS GUIDE

This overview of the *iAPPS Content Manager User Guide* describes the following:

- How the guide is organized for your reference
- Related documentation

1.1 Organization

This User Guide is organized into chapters:

- Chapters 1 through 4 introduce iAPPS Content Manager, content management terms and processes, and user roles. They also explain how to use the Control Center and Site Editor to perform basic content management tasks.
- Chapters 5 through 12 explain how to manage menus, pages, forms, blogs, libraries, lists, and RSS by way of the main navigation menu.
- Chapters 13 -16 explain how to perform site, user and workflow management tasks using the iAPPS Content Manager Administration menu.

1.2 Related Documentation

iAPPS Content Manager Documentation

In addition to this User Guide, the iAPPS Content Manager documentation also includes the *iAPPS Content Manager Developer's Guide.* The Developer's Guide is intended for those who are responsible for the design and development of websites within iAPPS Content Manager.

iAPPS Framework Documentation

The *iAPPS Framework Developer Guide* is written for developers who use the iAPPS Framework to develop custom web-based applications. The iAPPS Framework is an application integration platform (AIP).

IAPPS Suite Documentation

In addition there are User and Developer Guides for iAPPS Commerce, Analyzer and Marketier.

Part I: Introduction to iAPPS Content Manager

Control Center and Site Editor Tasks

2 iAPPS CONTENT MANAGER OVERVIEW

This chapter introduces the iAPPS Content Manager, content management terms, content management processes, and user roles.

2.1 iAPPS Content Manager

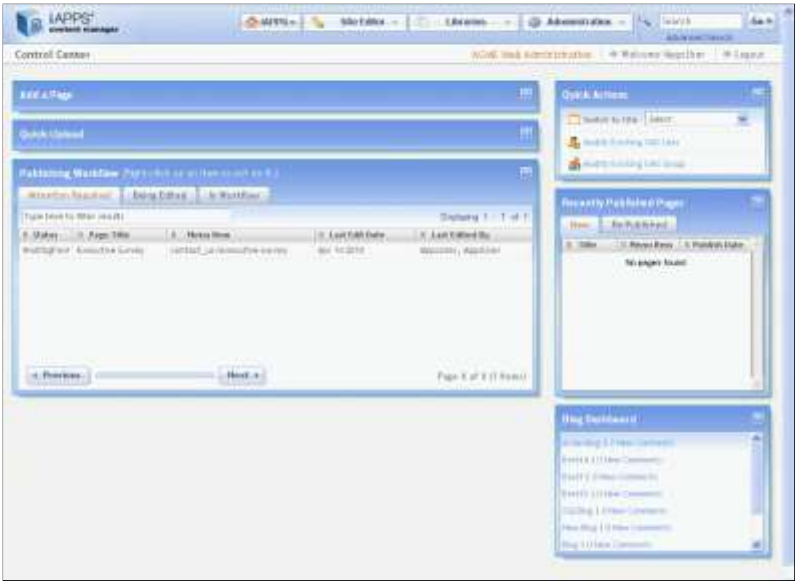
iAPPS Content Manager is a Content Management System (CMS) that enables website administrators to create and manage multiple websites, CMS users, and website users.

Users can create and edit pages for websites using page templates, which define a page’s layout and content options. Pages can include text, images, multimedia, and links to documents such as PDF and MS Word files.

With iAPPS Content Manager, multiple users can work on the same pages at different times, as determined by user roles and assigned workflows.

The user interface for iAPPS Content Manager consists of a **Control Center** for frequently performed tasks, and a **Site Editor** for creating and editing pages and submitting them into workflow.

iAPPS Content Manager Control Center



iAPPS Content Manager Site Editor

2.2 Multi-language User Interface

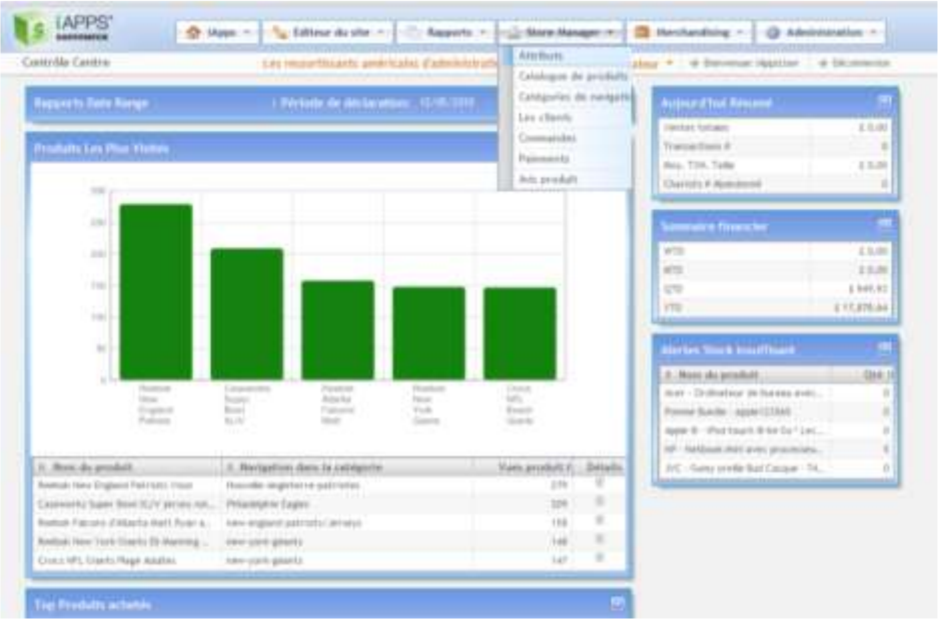
The iAPPS Administrative User Interface supports English, French, Spanish and German. The Admin containers, commands and Control Center menu language will change depending on the language of the browser you are using to access iAPPS.

How you change the language of your browser varies depends on which browser you are using. Note: To change languages in many browsers you will need to download a different version of the browser or special language files.

For more information, see

- For Firefox, see http://www.mozilla.org/en-US/firefox/all.html
- For IE, http://windows.microsoft.com/de-DE/windows/downloads/languages
- For Safari, http://www.apple.com/safari/download/
- For Chrome, you can add and change languages under **Tools,→ Options → Web**

The iAPPS Control Center in French language.



2.3 iAPPS Content Manager Terms

You need to be familiar with the following terms before:

- Creating or managing sites or users in iAPPS Content Manager
- Creating and managing content for sites in iAPPS Content Manager

Term	Definition
Archive	To store items, such as page templates, which are not in current use. These are stored in an archived folder, but are not deleted. Archived items can be restored (unarchived) if needed.
Activate	See **deactivate**.
CSS	Cascading Style Sheets. Style definitions (for example, font size and color) for elements in a page (such as headings) that are included in a separate file, which may be shared by multiple pages.
CMS	Content Management System. iAPPS Content Manager is a web CMS. A CMS is used to track your internal and external content and

Term	Definition
	to align your content with your company goals.
CMS group	A group of users who create and manage content for a site in iAPPS Content Manager.
CMS object	A CMS object is a component of a web page that can be managed by a CMS user. A CMS object may be one of the following: • menu item • page • file • image • content item • content item definition template • page template • style sheet (CSS) • list
CMS user	A user who creates and manages content for a site in iAPPS Content Manager.
Container	A Container in iAPPS Content Manager is a section in the Control Center or other iAPPS screen that provides access to commonly used features and functions. A Container in **Site Editor** is a pre-defined box on a page template where CMS users can insert pre-defined types of content such as text, images, multimedia, etc.
Content	Refers to the things a CMS user may insert in a page, including text, images, multimedia, links to documents such as PDF and MS Word files, etc.
Content area	Refers in general to the area on a page where CMS users can insert text, images, etc.
Content Definition Template	A pre-defined layout that specifies the exact placement of text, images, and other content. The content item definition template uses an XML form to store types of content and a stylesheet (.xslt) to create the output.
Content item	A single piece of content in a page. A content item can include text,

Term	Definition
	images, etc. in a pre-defined layout (refer to content item definition template); or, a content item can include text, images, etc. in whatever layout (free form) a CMS user creates. For example, a CMS user might type in a press release with text and images in either a pre-defined layout or a free form layout.
Data Libraries	Collectively refers to the three libraries in iAPPS Content Manager that contain data that CMS users can insert into pages. These are the Content Items Library, Images Library, and Files Library.
Deactivate	To make a user inactive; that is, deny him or her access to iAPPS Content Manager. A user can be activated; that is, granted access again if needed.
Directory	A folder that contains images, files, or content items for a site in iAPPS Content Manager. Images and files go into a physical folder (like in MS Windows Explorer). Content items have only virtual folders; they do not have a corresponding physical structure. Note that pages are stored under **Menus and Pages** and not under "directories".
Display Libraries	Collectively refers to the three libraries in iAPPS Content Manager that contain items that are used to define and format pages and content. These are the Styles (CSS) Library, Page Templates Library, and Content Definitions Library.
File	A document such as a PDF or MS Word file. Files are stored in the Files Library. Files generally do not open directly inside a page; CMS users can insert links to files in their pages. Multimedia files, such as Flash movies, are also stored in the Files Library. Unlike the other file types, multimedia files open directly inside a page.
Image	A graphic such as a logo, photo or line drawing. Images are stored in the Images Library and CMS users can insert images into pages.
Index terms	Terms that reference specific CMS objects for indexing, including content items, pages, files, images, and users. Index terms can be used throughout your site and the product suite for varying types of material. Even users can be assigned index terms, which can also

Term	Definition
	be assigned automatically or manually. Their exact uses will vary depending on your specific site setup, but index terms allow website creators to group, filter or collect information. So for example, a retail site could have an index term assigned to buyers of certain products. They might then run a Marketier email campaign with information on similar products. .
List	A group of CMS objects, (such as files) that are displayed on a single webpage. Content Manager displays these objects in a numbered or bulleted list.
Menu item	An option on a site menu. A website user clicks a menu item to move to another page.
Page	A single page on a site that contains a collection of text, images, multimedia, etc. A page is created from a page template, and represents the full-screen view in the browser (everything the site visitor sees in the browser window is part of the page). Pages are stored under “Menu Items” and not under “directories”.
Page template	A page with a pre-designed format and pre-defined containers that CMS users can use to create a page, then fill in that page with text, images, multimedia, etc.
Properties	The attributes of a CMS object, such as the title and description of a page or file.
RSS feed	A Really Simple Syndication (RSS) feed contains content in the form of pages from an associated web site. A feed allows website visitors to receive automatic notifications when the content is updated. An RSS feed may consist of multiple channels.
RSS channel	A RSS channel is one stream in an RSS feed. A CMS user can define one or more channels that contain one or more website pages. The channels make up the feed that website visitors can receive.
Security levels	Settings that determine access level permissions for website users.
Site	A connected group of pages. Also referred to as website.

Term	Definition
Style sheet	Refer to ***CSS***.
Unarchive	Refer to ***archive***.
User roles	User roles define the tasks that CMS users can perform. These roles include author, approver, and publisher, among others. Refer to Section 1.4 for a complete list of user roles.
Workflow	The specified order in which a page is sent from one CMS user to another for tasks such as editing, approval, and publishing.
XML	Extensible Markup Language. A computer markup language that manages custom tagging for your information storage needs.

2.4 Content Management Process

The process you follow to manage your site content depends on the number of people who are involved in creating, editing, and approving content for the site. It also depends on your specific role in managing the content or the site itself.

This section describes some examples of content management processes. These examples include:

- Creating a new page for a site and submitting it into the workflow.
- Editing, approving, and publishing an existing page to the site.

2.4.1 Process for Creating a New Page

If you are responsible for creating a new page for a site, this is the general process you might follow:

From **Control Center**, select **Libraries→Menus and Pages**.

Right-click on the menu item where you want to create the new page, and choose the **Add Page** option from the context menu. If you are creating an new menu item, right-click on the top-level menu item and select **Add Menu**.

Alternatively, you can create a new page in Site Editor by selecting the Menu item where you want the new page, right-clicking and selecting **Create and Connect New Page.**

Enter a name for your new page and choose the page template for building the page. Template allow users to quickly place items in the correct locations on the page.

Locate the areas in the template that you can edit by rolling the cursor over an area. If a green box appears you can edit or add items there.

Fill in the page with the appropriate content. This might include content items, lists, images, multimedia, or link to files such as PDF and MS Word documents.

- *Content items* are stored in the Content Items Library
- *Images* are stored in the Images Library
- *Multimedia and other files* are stored in the Files Library

> ⓘ Storing images and files in a library enables you to use them in more than one place on your site. If you need to update the image or file, you can re-upload it to the Images or Files Library using the same file name as the existing version. All links to that file will then point to the updated version.

After you have created your page, save it as a draft or submit it into workflow. If you submit your page into workflow, the next person in the pre-assigned workflow sequence can work on it. That person's responsibility might be to edit the page or to approve or reject it for publication on the site.

Once a page goes through all the steps in its workflow, it can be published. After the page is published, website users can view it as part of the site.

2.4.2 Process for Editing, Approving, and Publishing a Page

If you are responsible for editing, approving, and publishing an existing page for a site, this is the general process you might follow:

1. In the **Publishing Workflow** container in the **Control Center**, locate the page that requires your attention.
2. Right-click the page name and select **Open page in editor** from the menu.
3. Edit the page as needed.
4. Save the revised page and preview how it will look on the site.
5. Approve, reject, or publish the page, depending on the options available to you in that workflow. If you reject the page, it returns to the previous step in the workflow.

After the page is published, website users can view it as part of the site. See Managing Workflows for more information.

2.5 User Roles and Permissions

User roles and their corresponding permissions determine what content management, site management, or user management tasks you can perform in iAPPS Content Manager. The table below provides an overview of the different user roles and the tasks each role has permissions to perform. You can also click the “Explain Permissions” link from **Administration→CMS Users→View/Edit CMS User Permissions**. User Permissions Tables with a complete list of each task can be found in the Administrative tasks chapter.

User Roles and Permissions

User Role	Permissions
Author	Authors have permissions to create and edit pages, connect them to the site menu, and submit them into workflow. Authors can assign index terms to pages and delete pages. They can also create and delete lists. There are two types of Authors: **Menu-based Authors** are permitted to work on pages on specific menu items only. **Global Authors** are permitted to work on all pages under all menu items Authors will see the workflows for those items that have permissions for. **Note: If a menu-based author is assigned to a group with more permissions then the individual user, then the author will gain all the permissions of the group.**
Approver	Approvers can do everything Authors can do. In addition, Approvers can review another Author’s pages and approve or reject them. They will see workflows that involve them. There are two types of Approvers: **Menu-based Approvers** are permitted work on pages on specific menu items only. **Global Approvers** are permitted to work on all pages under all menu items. **Note: If a menu-based approver is assigned to a group with more permissions, then they will gain all the permissions of the group.**
Publisher	Publishers can do everything Authors and Approvers can do. In addition, they can publish pages live on the site. There are two types of Publishers: **Menu-based Publishers** are permitted to work on pages on

User Role	Permissions
	specific menu items only. **Global Publishers** are permitted to work on all pages under all menu items. They will see and be able to create workflows on all pages. **Note: If a menu-based publisher is assigned to a group with more permissions, then the publisher will gain all the permissions of the group.**
Content Administrator	Content Administrators can do everything Authors, Approvers, and Publishers can do. In addition, Content Administrators can create and edit menu items, and manage libraries of files, images, and templates. They can also create and assign workflows, and manage website users and security levels. Refer to Tables 2 through 5 for a complete list of permissions for Content Administrations.
Navigational Editor	Navigational Editors have permissions to add sub-menu items, rename menu items, and connect pages to menu items. Users cannot be assigned solely Navigational Editor status and permissions. Refer to Table 2 for a complete list of permissions for Navigational Editors. **Note: If a menu-based editor is assigned to a group with more permissions, then they will gain all the permissions of the group.**
Manager	Managers have permissions to manage libraries of content items, files, and images. Refer to Table 3 for a complete list of permissions for Managers.
Viewer	Viewers can only view content items, files, and images.
Archiver	Archivers can archive published pages.
Site Administrator	Site Administrators have permissions to edit, backup, and delete a site. They can also manage, create and delete CMS groups, CMS users, and website users.
Installation Administrator	Installation Administrators have permission to create new sites in iAPPS Content Manager. They can edit, backup, and delete sites. They can also add, edit, and delete CMS users.

The following table provides a list of menu, page, and list management tasks available from the iAPPS Content Manager Control Center. It shows which user roles have permission to perform each of these tasks.

Menu, Page, and List Management Tasks and User Roles

Tasks/User Role	Content Administrator	Navigational Editor	Author	Approver	Publisher
MANAGE MENUS:					
Rename a menu item	✓	✓			
Delete a menu item	✓	✓			
Add a sub-menu item	✓	✓			
Make a menu item invisible	✓	✓			
Edit menu item properties	✓	✓			
Add a page to a menu item	✓	✓	✓	✓	✓
Set a menu item as home page	✓	✓			
MANAGE PAGES:					
Jump to page in **Site Editor**	✓		✓	✓	✓
Edit page properties	✓		✓	✓	✓
Connect page to menu item	✓		✓	✓	✓
Assign index terms	✓		✓	✓	✓
Add a page	✓		✓	✓	✓
Delete a page	✓		✓	✓	✓
View page history	✓		✓	✓	✓
Archive pages	✓				

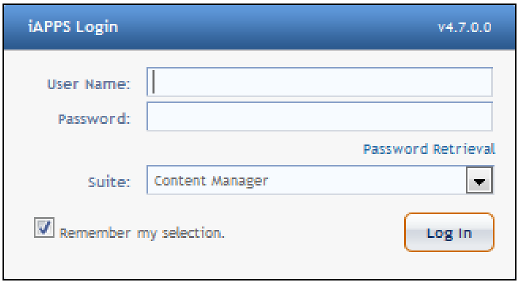
Tasks/User Role	Content Administrator	Navigational Editor	Author	Approver	Publisher
MANAGE LISTS:					
Add a list	✓		✓	✓	✓
View and edit a list	✓		✓	✓	✓
Delete a list	✓		✓	✓	✓

2.6 Login to iAPPS Content Manager

iAPPS Content Manager can be accessed only with a valid user name and password. Each iAPPS user is assigned a unique user name and password.

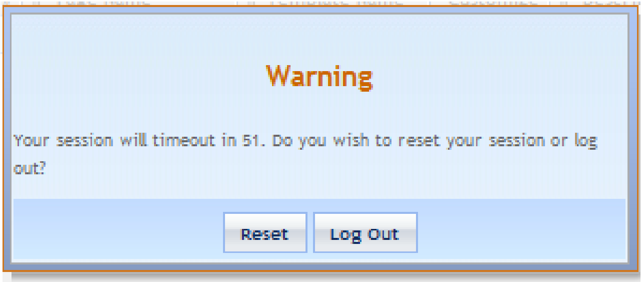
To login to iAPPS Content Manager:

- Type in your user name and password.
- Click the “Log In” button. If you want your name and password to be saved on the computer you are using, click the “Remember my selection.”



If you have forgotten your password, click the “Password Retrieval” link. Enter your user name and click the “Submit” button.

Your iAPPS session has a default log-out time of 20 minutes. If the session has no activity for 20 minutes, a warning message appears with the number of seconds left:

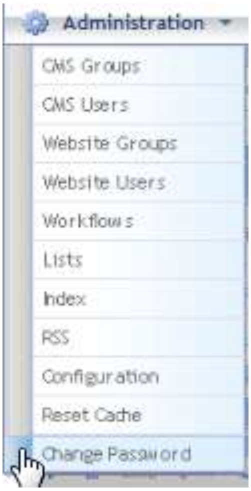


Click “Reset” if you want to continue your session. Otherwise you will be logged out.

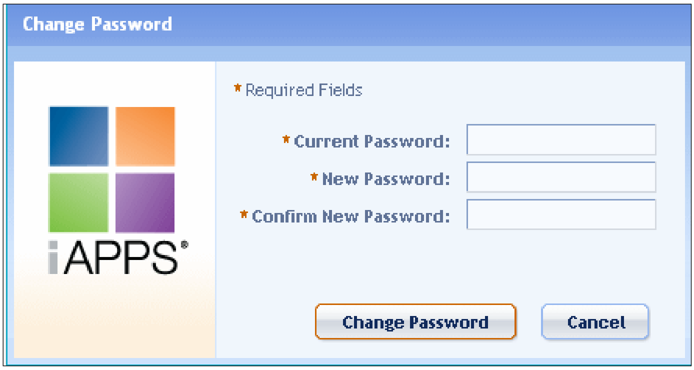
2.7 Changing Your Password

You must be logged in with your current password to change your password.

- To change your user password, select **Administration → Change Password** from the main navigation menu in the iAPPS Content Manager **Control Center**:



The **Change Password** container appears:

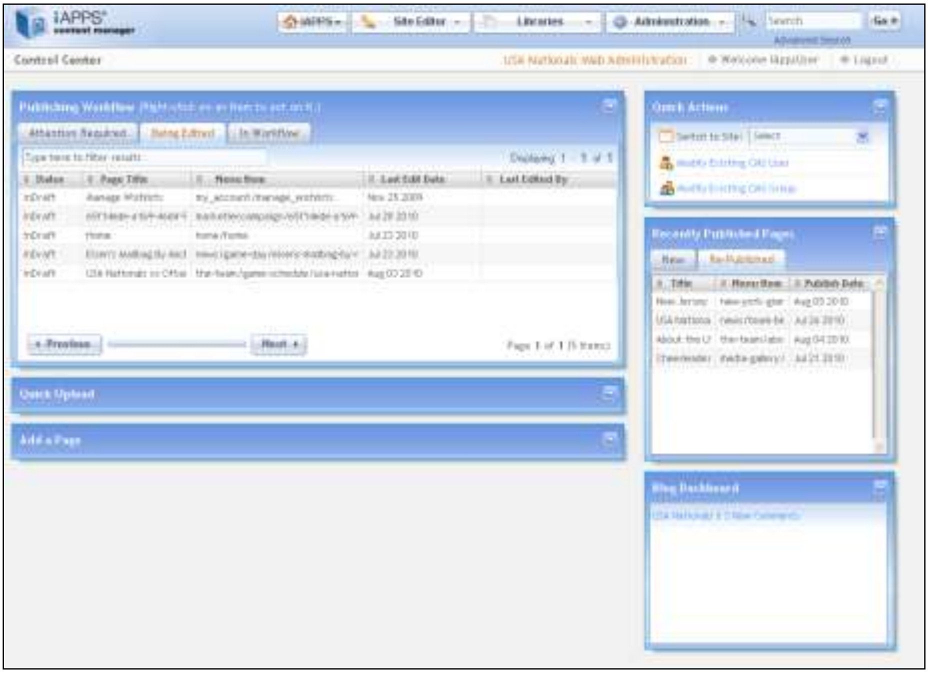


- Enter your current password in the “Current Password” field.
- Enter your new password in the “New Password” field.
- Enter your new password in the “Confirm New Password” field.
- Click the “Change Password” button.

3 THE iAPPS CONTENT MANAGER CONTROL CENTER

When you first launch iAPPS Content Manager, the **Control Center** page appears. The **Control Center** is your dashboard to all iAPPS functionality. It provides you with a main navigation menu and boxed sections called *containers*, which provide quick and easy access to commonly used features and functions. The **Control Center** also includes a **Search** function.

Content Manager Control Center



3.1 Main Navigation Menu Bar

The main navigation menu bar appears at the top of the **Control Center**. The options available to you within each of the navigation menus will depend on your user role. See User Roles and Permissions for details on user roles within iAPPS Content Manager.

> ⓘ The more permissions or roles that you have, the more options you will see. If you right-click on an item and don't see a drop-down menu, you cannot perform any actions on that item.

The **iAPPS** menu provides quick access to other products in iAPPS Product Suite to which you have access.

The **Site Editor** menu brings you to the **Site Editor** view, which allows you to edit your content in WYSIWYG mode. You can go directly to your home page or to the last page you visited.

The **Libraries** menu allows you to access your content libraries, including pages, images, downloadable files, forms, blogs, and blog comments. It also accesses content definitions, styles, page templates, and scripts.

The **Administration** menu allows you to manage internal and external groups of users. It also lets you manage lists, index terms, configuration, RSS, and passwords.

3.2 Control Center Containers

The contents of the **Control Center** are displayed in boxes called containers, which combine common features and functions.

- Click, hold, and drag containers to arrange them on the page.
- You can minimize or maximize a container by clicking the snap button ( ) in its top-right-hand corner. iAPPS remembers your container placement the next time you login.
- The containers available to you will depend on your user role.

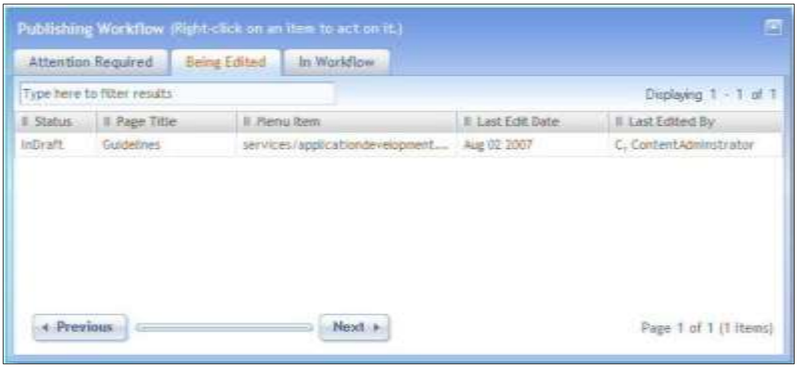
Containers you might see as part of your **Control Center** include:

- **Publishing Workflow**
- **Add a Page**
- **Quick Upload**
- **Recently Published Pages**

- **Add User**
- **Quick Actions**
- **Blog Dashboard**
- **Manage a Site**
- **iAPPS Content Manager Installation Information**

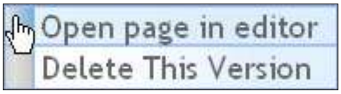
3.2.1 Publishing Workflow Container

The **Publishing Workflow** container has three tabs from which you manage pages that are in a Workflow:



Publishing Workflow Tab	Lists
Attention Required	Pages that cannot display. This might happen because you have not approved a page for publication.
Being Edited	Pages that have been created but are not yet in a Workflow.
In Workflow	Pages that are in a Workflow.

From any tab in this container you can open a page in Site Editor or delete the current version of the page. To open the page in **Site Editor**, right-click the page in the list and select **Open page in editor**.



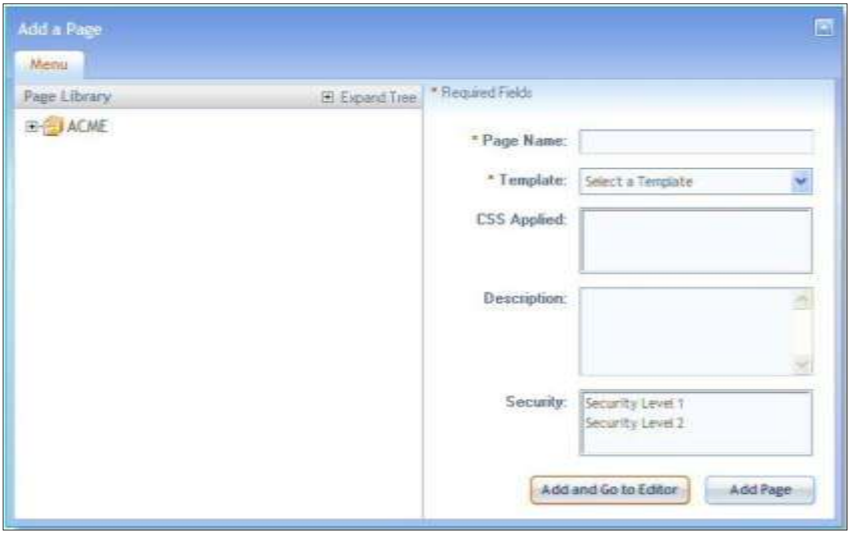
The page opens in **Site Editor** allowing you to take action on the page. See Chapter 3 of this Guide for a description of **Site Editor**.

To delete the current version of the page, right-click the page in the list on the *Being Edited* tab and select **Delete This Version.**

The page no longer appears in the **Publishing Workflow** container.

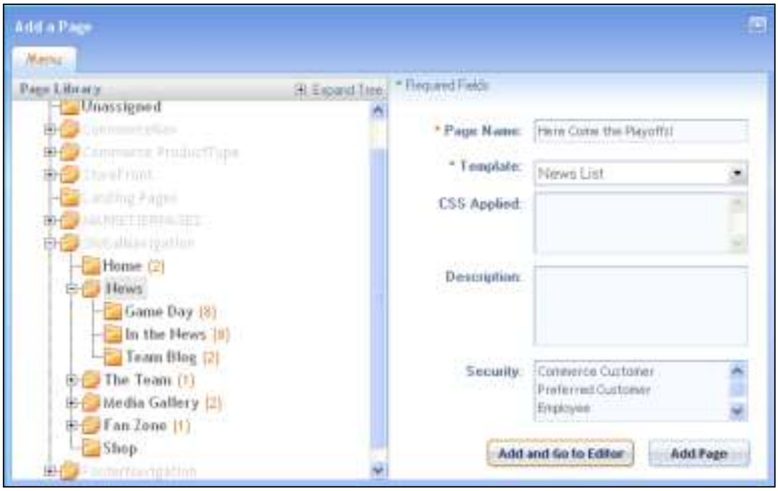
3.2.2 Add a Page Container

The **Add a Page** container lets you immediately add a page to the Page Library.



To add a page, follow these steps:

- Select the location in the Page Library where you want to add the page.



6. Fill in the appropriate information for the page.

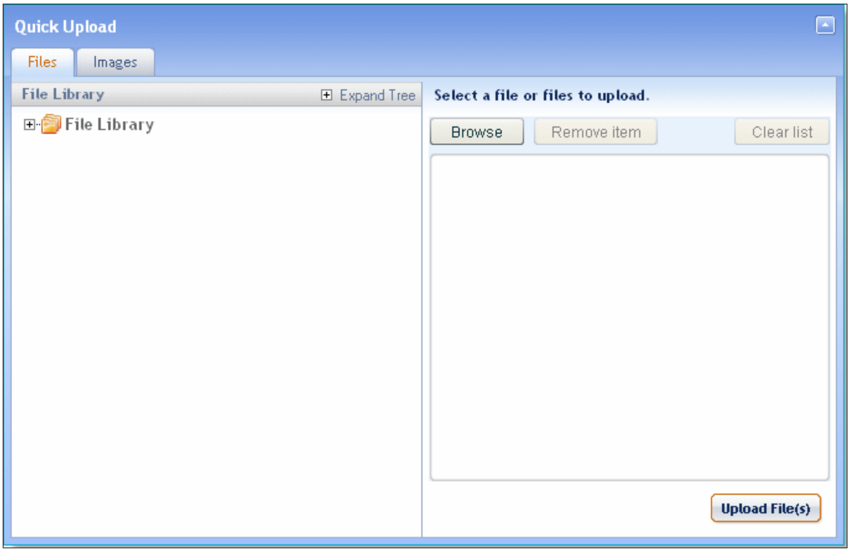
Click “Add Page” if you only want to add the page. Click “Add and Go to Editor” to edit the page in **Site Editor** after adding it.

Add Page	Add and Go to Editor
The new page appears in the Menu and Page	• The new page appears in the Menu and Page Library in the page list for the menu

Add Page	Add and Go to Editor
Library in the page list for the menu item where you selected to add the page.	item where you selected to add the page and open the page in **Site Editor**. • After you edit and save the page (**Page Actions → Save as draft**), the page appears in the **Publishing Workflow** container.

3.2.3 Quick Upload Container

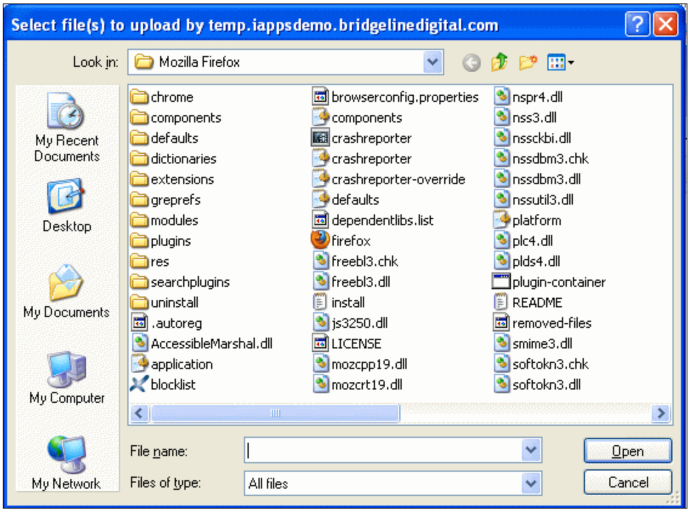
The **Quick Upload** container enables you to immediately upload files and images from your local machine to the Files and the Images Library.



To upload files or images, follow these steps:

- Click the appropriate tab for the items you want to upload: ***Files*** or ***Images***.

Select the directory to which you want to upload the file or image and click the “Browse” button on the right-hand side of the screen. A “Select file(s) to upload” dialog appears:



Select the file(s) or image(s) you want to upload. Hold the control key and click to select more than one file. The file(s) that you selected will appear in a pop-up:

Click the “Upload File(s)” button. An Upload Status dialog appears. Click the “Close” button when upload completes. The uploaded files are now stored in the selected Files or Images directory.

3.2.4 Recently Published Pages Container

The **Recently Published Pages** container displays a list of the pages that have been published during the last 15 days. This container includes two tabs: the ***New*** tab shows items published for the first time, and ***Re-Published*** shows item that have been previously published:

To open a page directly from the Recently Published Pages container, follow these steps:

- Click the appropriate tab for the page you want to access: ***New*** or ***Re-Published***.
- Right-click the page in the list and select **Open Page in Editor**.

- CMS opens the page in the **Site Editor**. Use the **Site Editor** to view or edit the page and save your file. If you submit the updated page to a workflow, it will appear in the workflow for approval or publication.

3.2.5 Add User Container

The **Add User** container in the Control Center lets a Site Administrator quickly add a CMS user to iAPPS Content Manager.

To add a CMS user, follow these steps:

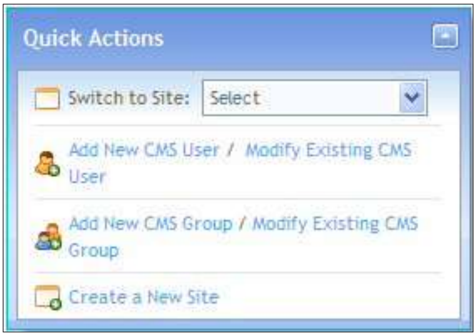
- Fill in the appropriate information for the user and add user roles.
- Click the “Add User” button.

3.2.6 Quick Actions Container

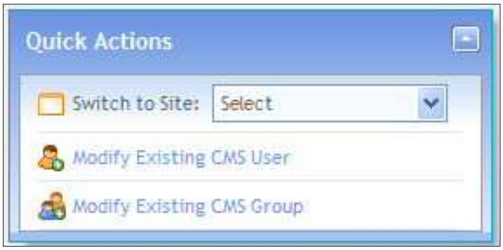
The **Quick Actions** container allows you to quickly access common tasks. The tasks that appear in your container depend on your user role. The tasks you might see include:

- Switch to another website in iAPPS Content Manager
- Add new CMS user/Modify existing CMS user
- Add new CMS group/Modify existing CMS group
- Create a new site

The following example shows a **Quick Actions** container for a user with the System Administrator role.



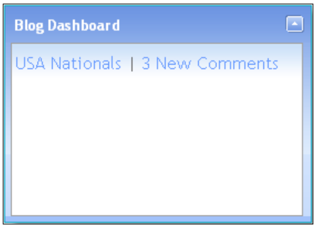
The following example shows a **Quick Action** container for a user with the Content Administrator role.



For instructions on how to add and modify users and groups, and how to create a new website, please refer to *Part III: Site and User Management* in this guide.

3.2.7 Blog Dashboard Container

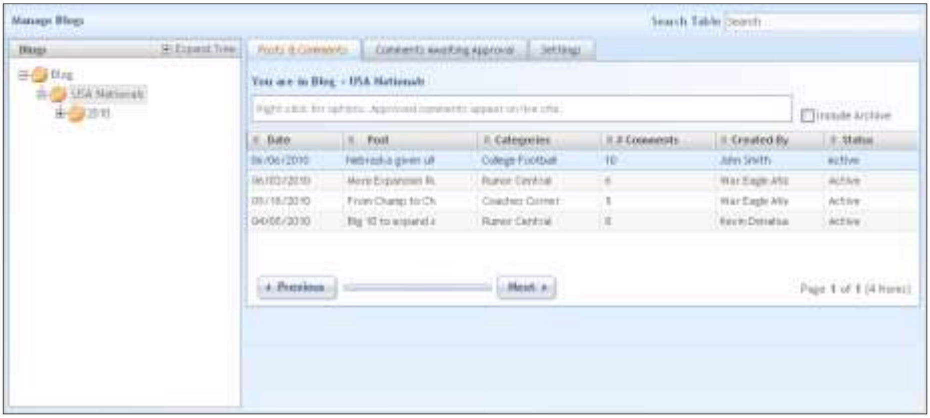
The **Blog Dashboard** displays a list of the blogs available on the site and any blog activity requiring action.



From the Blog Dashboard, you can:

- View all activity for a blog
- View blog activity requiring approval

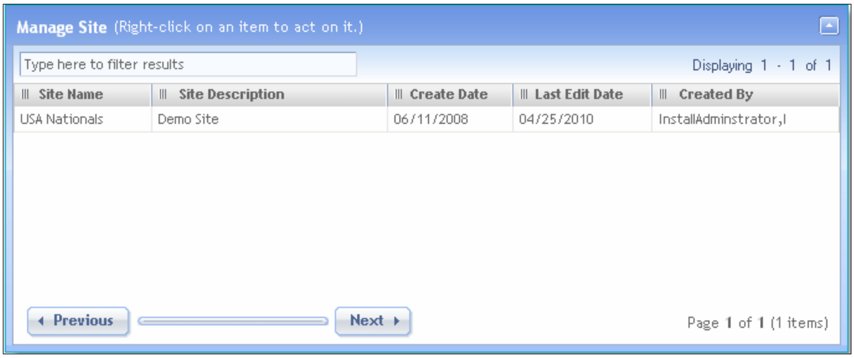
To view all activity for a blog, click a blog name. The **Manage Blogs** container displays all activity for the selected blog.



To view activity requiring action for a blog, click the recent activity link, *3 New Comments*, for example. From here you can approve or delete comments. For more information, see the Blogs section.

3.2.8 Manage Site Container

The **Manage Site** container allows the Installation Administrator and System Administrator to manage any of the websites in iAPPS Content Manager.

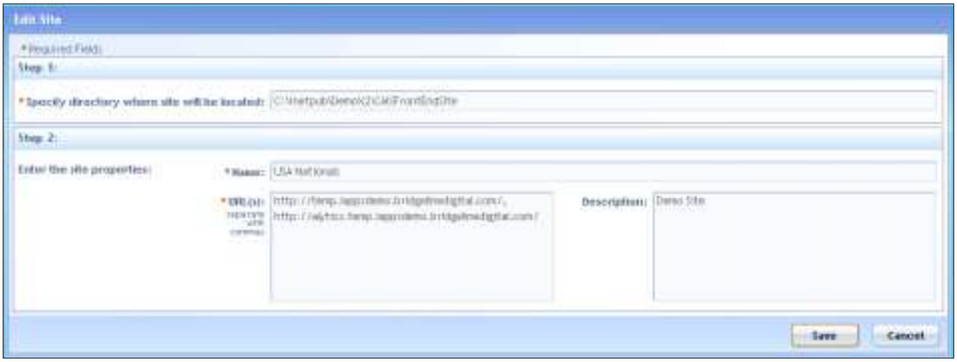


To manage a site, follow these steps:

Select the site in the list that you want to manage.

Right-click the site and select **View/Edit Properties**.

The **Edit Site** container appears.

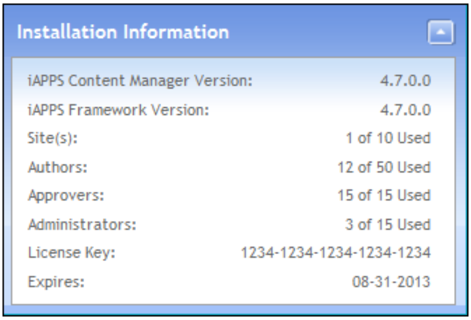


Use the wizard to specify the directory where the site will be located and to edit the site properties.

Click the “Save” button when you have finished.

3.2.9 iAPPS Content Manager Installation Information Container

Installation Administrators can also see **Installation Information** container in the Control Center, which displays the following information:



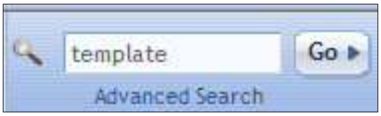
- iAPPS Content Manager Version #
- iAPPS Framework Version #
- The number of websites managed by iAPPS Content Manager (out of the total number available by license)

- The number of authors out of the total number available by license
- The number of Approvers out of the total number available by license
- The number of Administrators out of the total number available by license
- License key
- Expiration date for the license

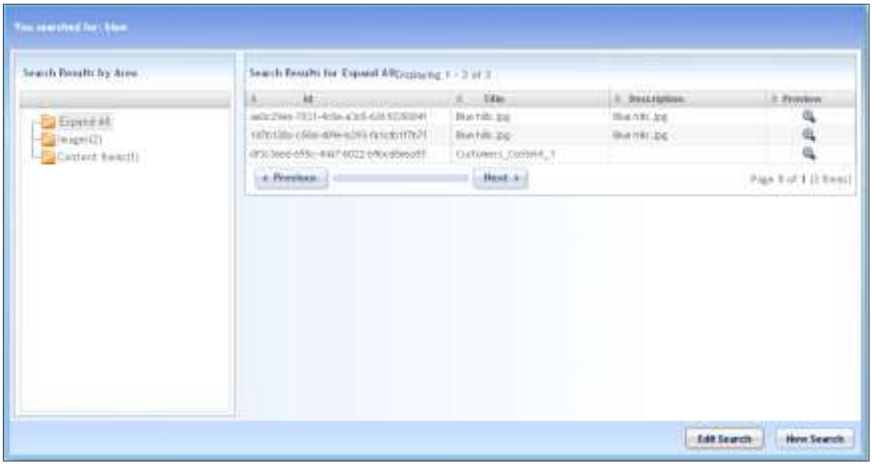
3.3 Search and Advanced Search

The ***Search*** function lets you enter one or more keywords to locate CMS objects in the site. The search occurs on all libraries, users, and groups, and matches the keywords against all the properties of these, to produce a list of results.

The ***Search*** function is located at the top right of the **Control Center**. To perform a basic search, enter one or more keywords in the ***Search*** field and click the "Go" button.



In the **Search Results** container, you can view all the results or view results by area, such as within content items or images.



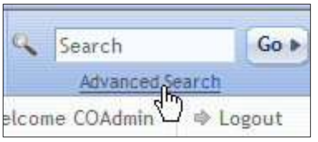
The ***Advanced Search*** function allows you to refine your search more specifically. You can refine the search by any or all of the following:

- Type of CMS object (images, files, users and so forth)

- Date the CMS object was created
- Date the CMS object was last edited

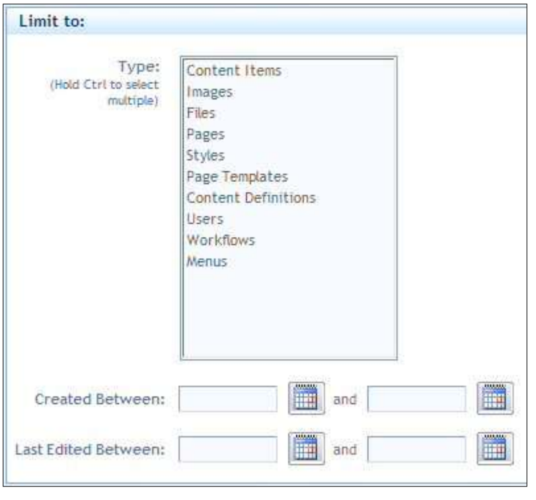
To perform an advanced search, follow these steps:

- Click the ***Advanced Search*** link in the ***Search*** box.



- Enter terms in the “Search Terms”field:

- Select the type(s) of content object you want to limit the search to and select either a date range for which an object was created or last edited:



- Click the “Search” button.

The **Search Results** container lets you view all the results or view results by type, such as within content items or images.

3.4 Customize Your Control Center

You can customize your view of the **Control Center** in two ways:

- To rearrange the containers, click the top of a container to drag and drop it into another location in the **Control Center**.
- To minimize a container, click the snap arrow in the top right-hand corner of the container.

> ⓘ Containers cannot be deleted; CMS displays the combination of containers in the Control Center based on your user role and assigned permissions.

Examples of Minimized Containers

4 USING SITE EDITOR TO MANAGE CONTENT PAGES

The chapter details the features and functions of **Site Editor**.

Site Editor enables you to quickly and easily manage a site in the front-end view. You can manage site pages and content from **Site Editor**.

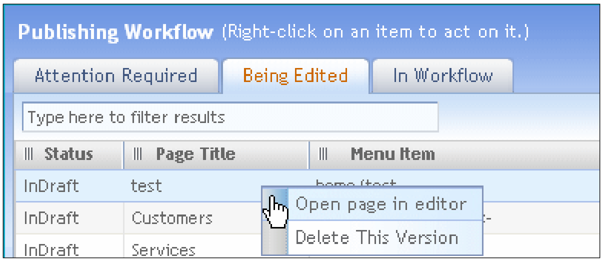
This means you can do the majority of upkeep on your website through the Site Editor's interface and easily see your site content changes in real time. Typically, you can also accomplish many of the same tasks through the Libraries interface and the Menus and Pages Container.

> ⓘ Remember that your tasks and access may change depending on your permissions. The site administrator can assign permission to change material to authors for the entire site or only certain sections or pages.

4.1 Accessing the Site Editor

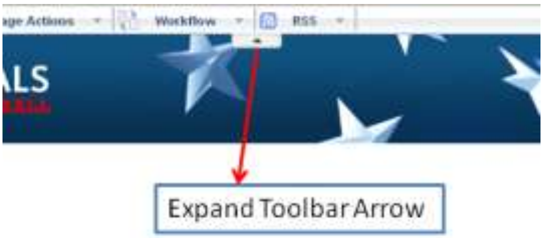
You can access the **Site Editor** in several ways. You can click Site Editor on the main navigation menu in the Control Center and select either **Jump to Home** (to go to the site's homepage) or **Jump to Last Visited Page** (to go to last page opened in Site Editor).

You may also right-click on a page anywhere it appears in a list of pages, such as the **Publishing Workflow** container in the **Control Center** or in Menus and Pages and select **Open page in Editor**:



Site Editor opens with its toolbar closed by default. To open the toolbar, click the pull-down arrow at the top of the screen.

Click the down-arrow [▼] at the top-middle of the window to expand the Site Editor toolbar.

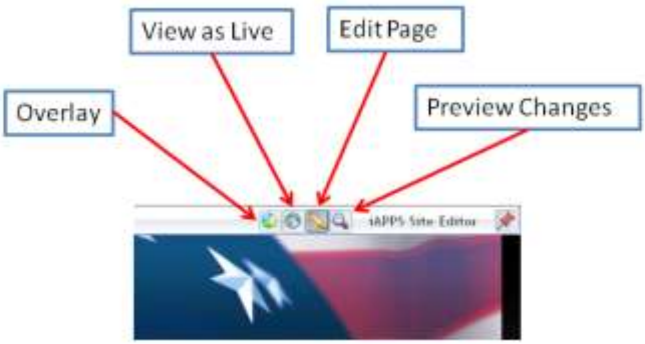


ⓘ This button both expands and collapses the Site Editor toolbar

You can lock the toolbar in the expanded state by clicking the Pin on the right:

4.2 Site Editor Display Modes

Click the **Edit Page** icon at the top-right side of the window to enter Edit Mode.



You can display a page in **Site Editor** in one of the following modes by clicking the appropriate mode icon in the upper right-hand corner of the **Site Editor** toolbar:

To get into this mode	Use this Site Editor icon
Click the **Overlay** icon to view an overlay on the complete page showing: • How many visitors clicked on each clickable area in the page • The percentage of all clicks on this page received by each clickable area.	
Click the **View as Live** icon to view the page as it appears live on the website.	
Click the **Edit** icon to make the page editable.	
Click the **Preview Changes** icon to preview your edits in a page before it is published.	

4.2.1 Managing Pages

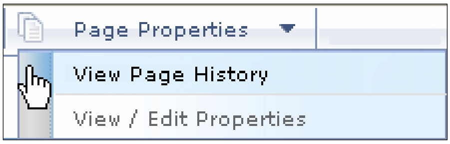
The **Site Editor** toolbar includes drop-down menus for managing pages.

Depending on your role, you can perform some or all of the following tasks for pages with the **Site Editor** toolbar:

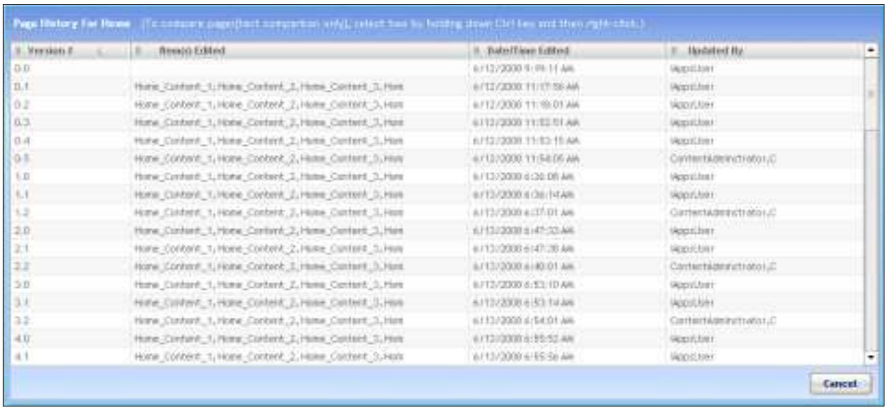
- View the history of a page
- View and edit the properties of a page
- Save a page as a draft
- Archive a page
- Submit a page into workflow
- Publish a page
- Add a page to an RSS channel

4.2.2 Viewing Page History

To view previous versions of a page, select **View Page History** from the **Page Properties** menu on **Site Editor** toolbar.



The **Page History for *Pagename*** container appears:



The list displays the following information for each page:

Page History Column	Description
Version #	Each time a user edits a page and **Saves as Draft** or **Archives** the page, Content Manager saves a unique copy of the page and assigns it a two part version number, #.#. Content Manager increments the version number as follows: First part increments each new day that a page is published. Second part increments each time on any given day that the page is saved as a draft. Therefore, the first day on which a page is published, the version numbers are: 0.0, 0.1, 0.2 and so forth. The next day on which the same page is published, the version numbers are: 1.0, 1.1, 1.2 and so forth.
Item(s) Edited	Lists the editable content areas on the page.
Date/Time Edited	Specifies the date and time the page was saved.
Updated By	Specifies the name of user who updated page.

From the Page History list, you can:

- Return to Site Editor
- Rollback to previous version
- Compare two versions

4.2.2.1 Returning to Site Editor

To return to viewing this page in **Site Editor**, click “Cancel” in the bottom right of the Page History list.

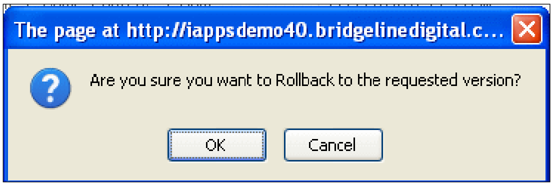
4.2.2.2 Rolling Back Version

You can roll back a page to revert that current version of it to an earlier one.

To roll back a page to an earlier version, follow these steps:

- Click on the version to which you want to roll back.
- Right-click that page and select **Roll Back to This Version**.

A confirm roll back dialog appears:



- Click the “OK” button. Content Manager displays the version of the page to which you selected to roll back in the **Site Editor**.

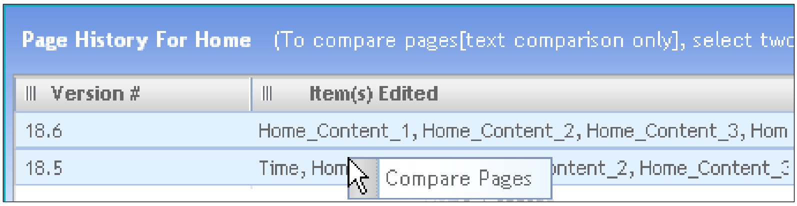
4.2.2.3 Comparing Page Versions

You can compare the differences between two versions of the same page.

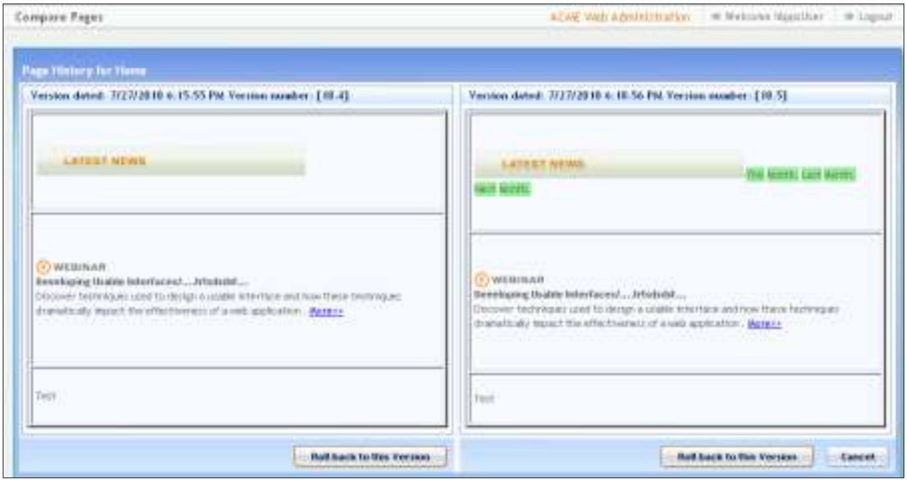
> ⓘ When you compare versions of a page, Content Manager displays the differences in the pages only of any free-form text in each of the pages. The comparison does not show differences in the pages of any text in a pre-defined content item definition template.

To compare versions of a page, follow these steps:

- Click on a version of the page to use for the comparison.
- Press the Control key and click on the second page to use for the comparison.
- Right-click and select **Compare Pages**.



A *Compare Pages* pop-up appears:



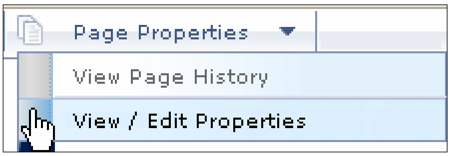
View the differences between the free-form texts in the pages. Optionally, you can roll back to one of the page versions used in the comparison.

- Click “Roll back to This Version.” Content Manager displays a roll back confirmation dialog.
- Click the “OK” button. The version of the page that you rolled back to appears in the **Site Editor**.
- Click the “Cancel” button when you finish comparing versions of a page to return to the Page History list.

4.2.3 Viewing / Editing Properties

To view and edit the properties of a page, follow these steps:

- Select **View/Edit Properties** from the **Page Properties** menu on the **Site Editor** toolbar.



- View and edit the basic Page Properties as described in the following table:

Page Properties Field	Description
This page exists in the following menus	Lists all of the menus within the site where this page is located.
Page Name	The name given to the page by the author.
Url Friendly Name	This name makes it easier for a user and a search engine crawler to decipher. It is used for Search Engine Optimization.
Template	The template used to create the page.
Page Description	Description of the contents or use of this page.

Click the  to view and edit **Advanced Properties**.

Advanced Page Properties Field	Description
Security Level	Specifies the security level(s) designating which website users have permissions to access this page.

Index Terms	Specifies index terms (a tag that you can use programmatically to aggregate pages or filter lists) assigned to this page.
Global CSS	Specifies the CSS file(s) that Content Manager automatically applies to all pages.
Apply Local CSS	Specifies the CSS file(s) that Content Manager applies to this page.

Click the to view and edit Search Engine Optimization properties.

Search Engine Optimization (SEO) Field	**Description**
H1 Tag	The <H1> tag value to appear in the rendered HTML of this page.
Title Tag	The <TITLE> tag value to appear in the rendered HTML of this page.
Keywords	Descriptive keywords about the page to power the internal site search engine.
Descriptive Metadata	The <META> tag value to appear in the rendered HTML of this page.
Other Metadata	Any other HTML meta data that you want to appear inside the rendered HTML of the page

Click the “Save Changes” button if you made any changes or click the “Cancel” button if you did not make any changes. The updated page appears in the **Site Editor**.

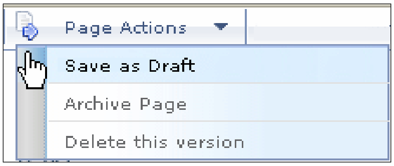
4.2.4 Working with Page Actions

Page actions include:

- Saving as Draft
- Archiving Page
- Deleting Page

4.2.4.1 Saving as Draft

The Save as Draft option saves the page as a draft. A draft is not meant to be submitted into the workflow; it is only a working copy**.** To save a page as a draft, select **Save as Draft** from the Page Actions menu on the **Site Editor** toolbar.

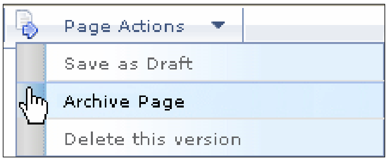


When the page refreshes, the draft is saved. You can return to the draft at a later time to resume work on it.

4.2.4.2 Archiving /Restoring Pages

The Archive Page option lets you move the page to the archived folder. Once that is done, the page is no longer live on the website.

To archive a page, select **Archive Page** from the **Page Actions** menu.



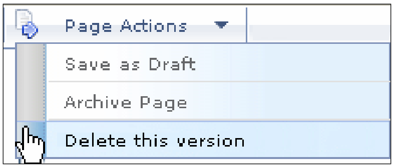
The page is moved to an archived folder.

To restore the page, follow these steps:

- Select **View Page History** from the **Page Properties** menu.
- Locate the page version in the list. Right-click and select **Roll Back to this Version** to restore the page.

4.2.4.3 Deleting Page

You can delete a version of a page when that version is opened in the **Site Editor**. To delete a version of a page, select **Delete this version** from the **Page Actions** menu.



Content Manager deletes the version of the page currently open in **Site Editor** and displays the previous version of the page.

4.2.5 Page Workflow

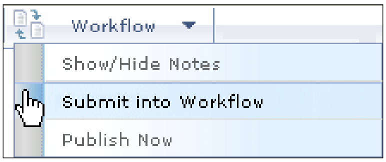
Page Workflow options include:

- Submit into Workflow
- Publish Now
- Show/Hide Notes

4.2.5.1 Submitting into Workflow

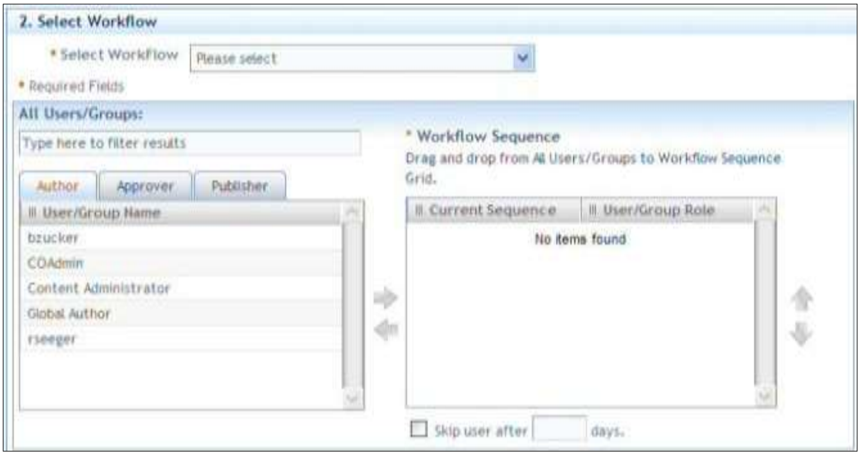
To submit a page into workflow, follow these steps:

- Select **Submit into Workflow** from the Workflow menu.

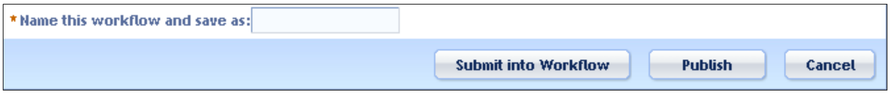


- Fill in the appropriate information. This includes a publish date (which can be set in the future) as well as a date for the content to be removed and automatically archived. The High Priority button simply sends the email notifying users about content waiting in their Review Container with high priority.

While you can alter a workflow sequence in the **Submit into Workflow** container, generally you will be submitting to an already existing workflow by choosing it from the "Select Workflow" field. You can get more information on setting up workflows both from the Creating a New Workflow section of this manual as well as from the *iAPPS User Scenario Manual.*

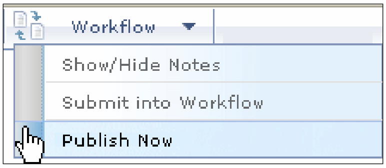


- Click the "Submit into Workflow" button to submit the page to the workflow, or click the "Publish" button if the page is ready to be published.



4.2.6 Publishing

When you publish a page, it goes live on the website. To publish a page from the **Site Editor**, select **Workflow → Publish Now**.

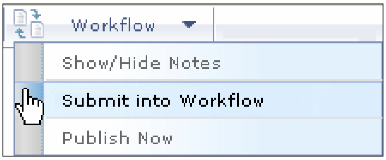


The page goes live on the website and appears in the **Recently Published Pages** container in the **Control Center**.

4.2.6.1 Publishing in the Future

You can also set your content to publish in the future.

To publish at a future date and time, choose **Submit into Workflow** under the **Workflow** menu.



Then simply set the date and time of day for publication in the *Publish Date* fields.

Then click the "Submit into Workflow" or "Publish" buttons as appropriate.

4.2.6.2 Archiving content automatically

If you want content to automatically be removed from the website when it becomes out of date (such as a promo for a holiday sale). Choose **Workflow →Submit into Workflow** and fill out the *Archive Date* fields in the Schedule Publication pane.

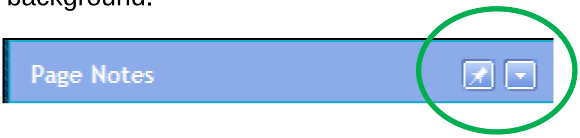
Then click the “Submit into Workflow” or “Publish” buttons as appropriate.

4.2.7 Working with Page Notes

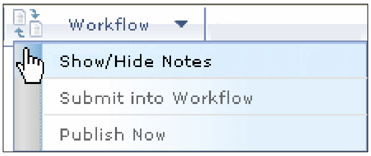
Content Manager also includes a feature that allows you to create and store notes about the page currently open in the **Site Editor**.

When you switch to Site Editor, the Page Notes will appear automatically.

You can drag and drop the Page Notes container around the screen, “pin” it open, or use the snap button to maximize or minimize the container. If you are not using the notes, they will fade into the background.



If you want to hide them entirely, select **Workflow → Show/Hide Notes**.



4.2.7.1 Creating Page Notes

To create a new page note, follow these steps:

- Click in the Page Notes dialog text box where *Click to add a comment* displays.
- A standard note appears in black text. To make an important note appear in red text, click the "High Priority" checkbox.
- Click the "Save Note" button. The note you entered appears in the Page Notes list.

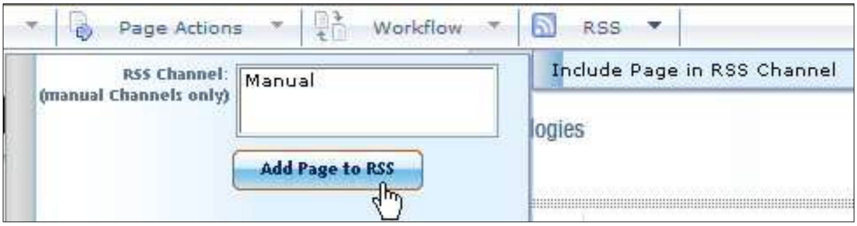
ⓘ Be careful with your entries. Page Notes cannot be deleted.

4.2.8 Adding Page to RSS Channel(s)

The Add Page to RSS Channel(s) option provides a list of all the manual RSS channels created. In the edit mode, the Selected Channels are highlighted. You can select or de-select the channels for the page.

To add a page to an RSS Channel, follow these steps:

- Select **Include Page in RSS Channel** from the **RSS** menu.

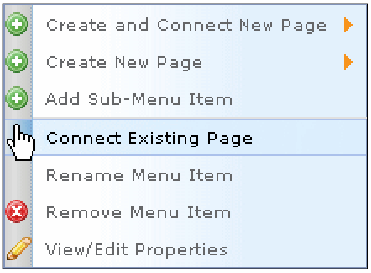


- Select the channel(s) in the popup layer to which you want to add the page and click the "Add Page to RSS" button.

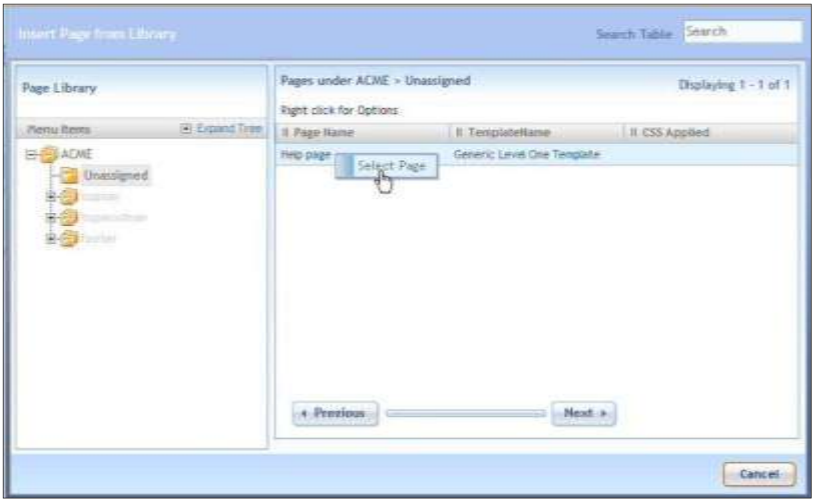
4.2.9 Connecting an Existing Page

To connect an existing page to a menu item, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar.
- Right-click a menu item and select **Connect Existing Page**.



The ***Insert Page From Library*** pop-up appears. Locate the page you want to connect to in the library page list.



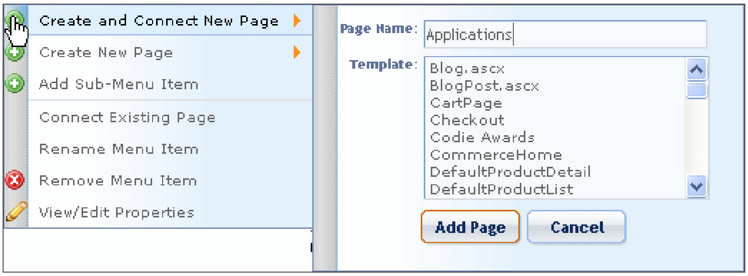
- Right-click the page and choose **Select Page**. Content Manager displays a confirmation dialog: Click the “OK” button.
- Content Manager connects this page to the selected menu item and stores it under that menu item.

4.2.10 Creating and Connecting New Page

To create a new page and connect it to a menu item, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar.

- Right-click the menu item to which you want to connect a page and select **Create and Connect New Page**.



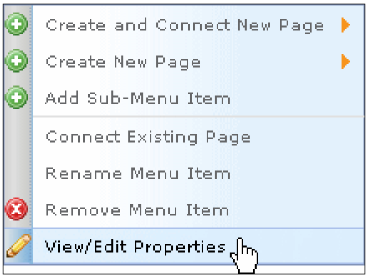
- Enter a name in the *Page Name* field.
- Click a template name to select one for this page.
- Click the **Add Page** button. The new page appears in **Site Editor**.
- Click the Edit icon on the **Site Editor** toolbar.
- Add content to the new page.

Content Manager connects the new page to the selected menu item and stores it under that menu item.

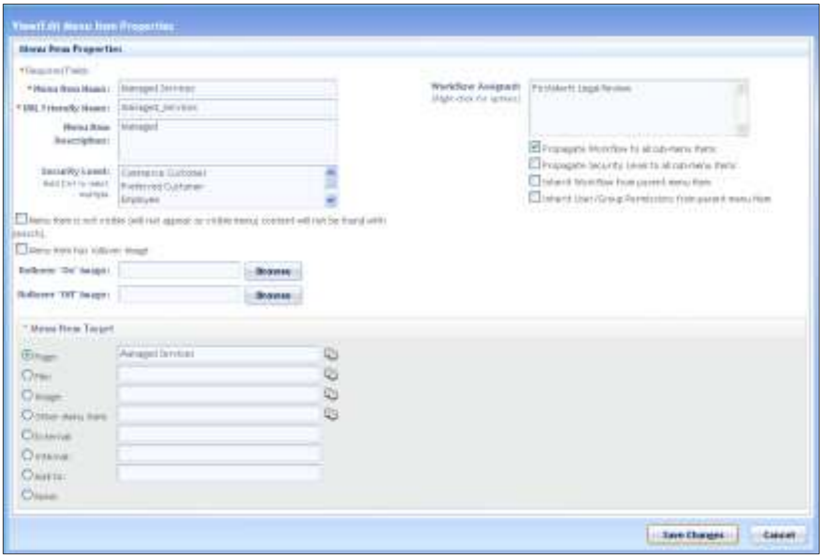
4.2.11 Viewing / Editing Menu Item Properties

To view and edit the properties of a menu item, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar.
- Right-click the menu item and select **View/Edit Properties**.



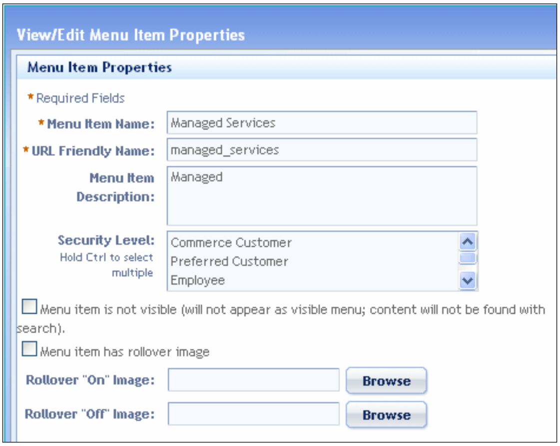
The **View/Edit Menu Item Properties** container appears:



- When you finish viewing and/or editing menu item properties, click the “Save” button if you made changes or the “Cancel” button to return to the page.

4.2.11.1 Viewing / Editing Menu item Properties

View and edit menu item properties as described in the following table.



Menu Item Property	Description
Menu Item Name	Name of menu item.
URL Friendly Name	A Web address that is easy for a user and a search engine crawler to decipher.
Menu Item Description	Brief description of content or use of this menu item.
Security Level	Assigns a security level to this menu item. Optionally, press Ctrl-Click on two or more security levels to assign multiple security levels to this menu item.
Menu item is not visible	Click this checkbox to make menu item not visible.
Menu item has rollover image	Click this checkbox to specify one or more rollover images to this menu item.
Rollover “On” Image	Click in the Rollover On Image field or click the “Browse” button to select an image to appear when a cursor rolls onto this menu item.
Rollover “Off” image	Click in the Rollover Off Image field or click the “Browse” button to select an image to appear when a cursor rolls off of this menu item.

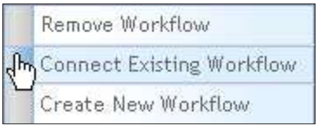
4.2.11.2 Viewing / Editing Menu Item Workflows

You can assign workflows to menu items. To manage menu item workflows, you can:

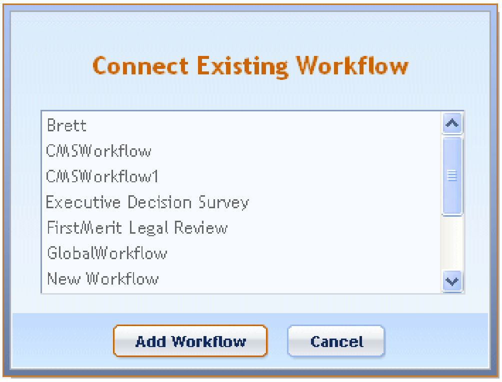
- Connect to an Existing Workflow
- Create a Workflow
- Remove a workflow

To connect a menu item to an existing workflow, follow these steps:

- Right-click in the **Workflow Assigned** selection box, and select **Connect Existing Workflow.**



The **Connect Existing Workflow** dialog appears:



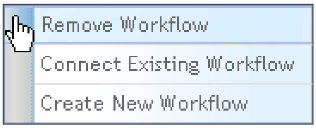
- Click on a workflow in the Connect Existing Workflow selection box and the click **Add Workflow** button. The selected workflow appears in the Workflow Assigned selection box.

To create a new workflow for a menu item, follow these steps:

- Right-click in the ***Workflow Assigned*** selection box, and select **Create New Workflow.**

- The **Manage Workflows** container appears. Create a workflow for the page. See managing workflows for how to create a workflow.

To remove a workflow, right-click on a workflow in the ***Workflow Assigned*** selection box and select **Remove Workflow**.



The workflow no longer appears in the selection box.

4.2.11.3 Setting Menu Item Options

You can set the menu item options described in the following table:

Menu Item Check Box Options	Description
Propagate Workflow to all sub-menu items	Click this checkbox to propagate an assigned workflow to all sub-menu items.
Propagate Security Level to all sub-menu items	Click this checkbox to propagate all selected security levels to all sub-menu items.
Inherit Workflow from parent menu item	Click this checkbox to assign a workflow to this menu item through inheritance of its parent menu item.
Inherit User/Group Permissions from parent menu item	Click this checkbox to assign user/group permissions to this menu item through inheritance of its parent menu item.

4.2.11.4 Viewing/Editing Menu Item Target

The *Menu Item Target* area allows you to view or select the target to which a menu item links. Targets include: page, image, external URL and more.

Select a menu item target by clicking the radio button for the appropriate target type as described in the following table:

Menu Item Target	Description
Page	Click the **Page** radio button to select a page as the menu item target. Click the browse icon.

Menu Item Target	Description
	The Insert Page from Library dialog appears. Locate the page to use, right-click and select: Select page. The name of the page appears in the Page field.
File	Click the **File** radio button to select a file as the menu item target. Click the browse icon. The Insert File from Library dialog appears. Locate the file to use, right-click and select: Select file. The name of the file appears in the File field.
Image	Click the **Image** radio button to select an image as the menu item target. Click the browse icon. The Insert Image from Library dialog appears. Locate the image to use, right-click and select: Select Image. The name of the image appears in the Image field.
Other Menu Item	Click the **Other Menu Item** radio button to select another menu item as the target of this menu item. Click the browse icon. The Select Menu Item for List dialog appears. Locate the image to use, click and click the Select Menu Item button. The name of the menu item appears in the Other Menu Item field.
External	Click the **External** radio button to specify an external URL to use as the target of this menu item. Specify the external URL in the field.
Internal	Click the **Internal** radio button to specify an internal URL as the target of this menu item. Specify the internal URL in the field.
Mail to:	Click the **Mail to:** radio button to specify an email recipient as the target of this menu item. Specify the Mail to: email address in the field.

Menu Item Target	Description
None	Click the **None** radio button to not assign a target to this menu item.

4.3 Managing Content Areas

A content area is a section of the page that displays content. Multiple content areas may exist on a single page including:

- Free-form content
- Content definition content.

Free-form or Rich Text content is placed in a blank container with few restrictions on how the content appears. Using the WYSIWYG Site Editor Toolbar, you can insert text, format it, and add links, flash videos or images. This type of material is saved as a Content Item in the Content Items Library.

Content Definitions are used to more closely control how content appears. The formatting, spacing and other style issues are pre-set as part of the definition. Content definitions are used for text that is often repeated in a site, such as a “Related Items” section or press releases which need to have certain pieces of information (such as contact name or a release date) appear in a set order or type of display. They are stored in the Content Definitions Library.

You can also create Code Snippets for material that you use on a regular basis.

4.3.1 Managing Free Form Content

You can perform the following tasks with free-form content:

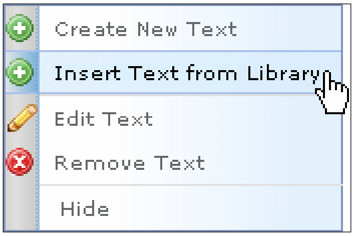
- Insert text from the library
- Edit text and create a link within that text
- Create a new content item
- Remove a content item
- Hiding a content item

4.3.1.1 Inserting Text from Library

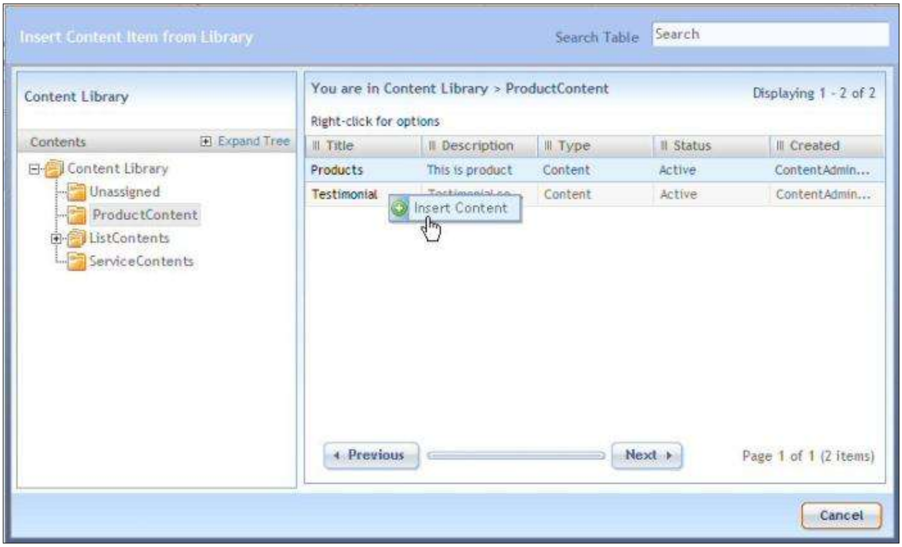
To insert a content item from the Library, follow these steps:

Click the Edit icon  on the **Site Editor** toolbar.

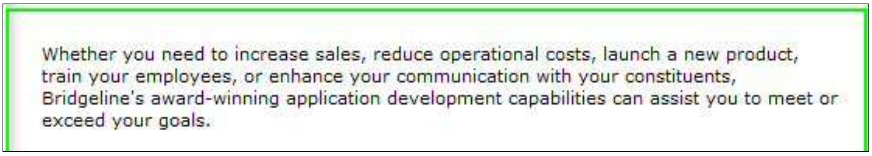
Right-click in the text container where you want to insert content and select Insert Text from Library.



The Insert Content Item Form Library dialog appears:



Right-click on the content item that you want to insert and select Insert Content. Content Manager inserts the selected text into the text container.

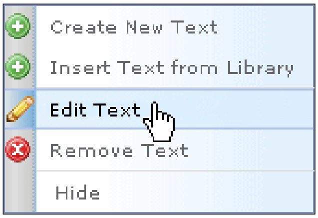


4.3.1.2 Editing Text

To edit text in a content item, follow these steps:

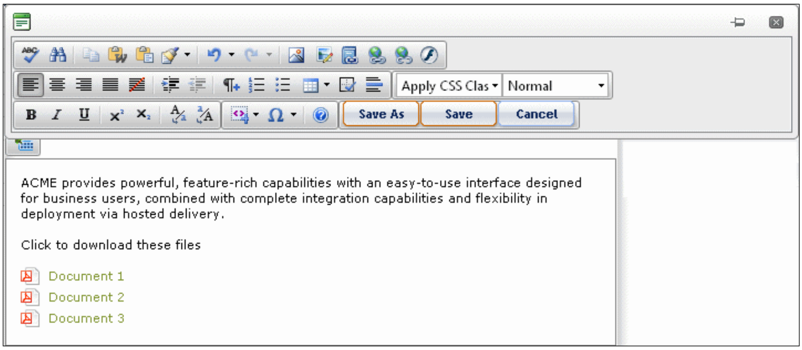
Click the Edit icon  on the **Site Editor** toolbar.

Right-click the text container that holds the content item that you want to edit and select Edit Text.



The editor toolbar appears above the selected text container. See the WYSIWYG Editor Toolbar for Editing Text section below for detailed information on the editor toolbar.

Edit the content and then click the “Save” button to retain your changes.

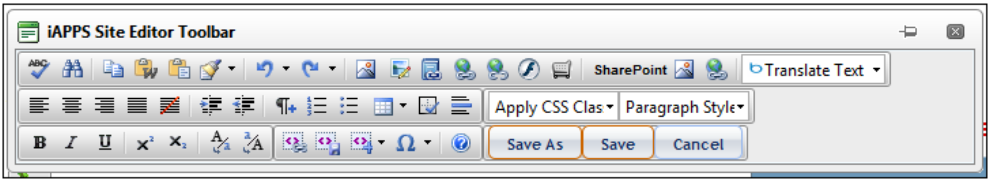


4.3.1.3 WYSIWYG Editor Toolbar for Editing Text

iAPPS features two toolbars for editing text in Rich text content areas or in content definitons.

The WYSIWYG editor toolbars use icons for all of the features and functions you need to optimize page content. Moving the cursor over a toolbar icon displays tooltips describing the function of that icon.

Rad Editor Toolbar

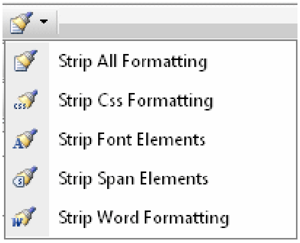
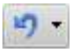


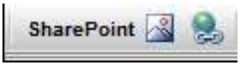
CK Editor Toolbar

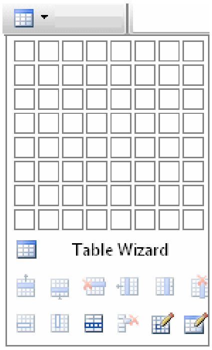
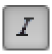
Which toolbar you will see is determined by your installation administrator, who can choose the editor in the Site Settings.

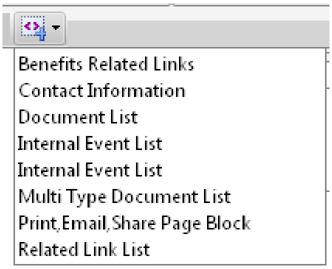
The following table describes the function of each icon in the Rad Editor WYSIWYG toolbar, and one below it shows the CK Editor Toolbar functions.

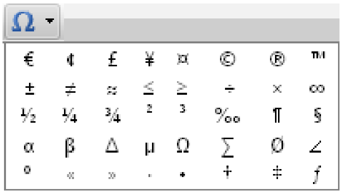
Rad Editor Icon	**Description**
	Spellchecker. Checks the spelling and grammar of the text.
	Find and Replace. Launches the Find and Replace feature.
	Copy. Copies selected content to clipboard.
	Paste from Word. Pastes content copied from Word, removing non-web tags.

Rad Editor Icon	Description
	Paste Plain Text. Removes formatting of text and pastes as plain text into the editor.
	Format Stripper. Strips text formatting according to the selected options: 
	Undo. Undoes the last action.
	Redo. Redoes/repeats the last action that has been undone.
	Insert image. Displays the Insert Image from Library dialog where you select an image to insert into text container.
	Edit Image. Displays an image editing dialog for the selected image.
	Link to Library. Displays dialog to specify link target for selected text to content in Content Manager libraries or an external URL.
	Hyperlink Manager. Displays dialog to specify link target for selected text to window, custom target, anchor, or email.
	Remove Link. Removes selected link.

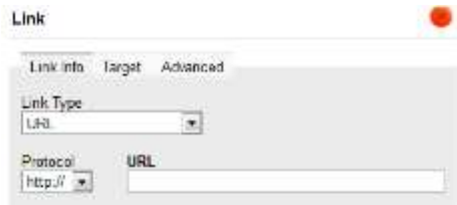
Rad Editor Icon	Description
	Insert Flash From Library. Displays dialog to insert a Flash file from a Content Manager library and set its properties.
	Insert links to SharePoint assets such as images, page and files. You will need to have all appropriate permissions for any SharePoint content. **Note:** Once content is drawn in from a SharePoint library, it is not dynamically updated. This is to prevent changes to your SharePoint library if users in iAPPS make changes to the content. If there are changes to your SharePoint content, you will need to reimport the material into iAPPS.
	Translate highlighted text into additional languages. Remember that this is a basic translator and you may want to have your website content reviewed by a professional translator.
	Left Alignment. Aligns selected text to the left.
	Center Alignment. Aligns selected text to the center.
	Right Alignment. Aligns selected text to the right.
	Justify. Aligns selected text justified.
	Remove Alignment.
	Indent. Indents selected text to the right.
	Outdent. Indents selected text to the left.
	New Paragraph. Inserts new paragraph.

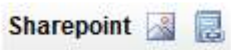
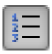
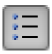
Rad Editor Icon	Description
	Numbered List. Inserts a numbered list.
	Bulleted List Inserts a bulleted list.
	Insert Table. Displays the table editor. 
	Show/Hide Borders. Shows/hides table borders.
	Horizontal Rule. Inserts a horizontal rule.
	Apply CSS Class. Displays a list of available CSS classes available to apply and the option to clear a previously applied class.
	Apply Paragraph Style. Displays a list of paragraph styles to apply to selected text.
	Bold. Applies bold formatting to selected text.
	Italic. Applies italic formatting to selected text.

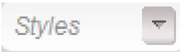
Rad Editor Icon	Description
	Underline text. Applies underline formatting to selected text.
	Superscript. Formats selected text as superscript.
	Subscript. Formats selected text as subscript.
	Convert to lower case. Formats all selected text as lower case characters, preserving the non-text elements such as images and tables.
	Convert to upper case. Formats all selected text as upper case characters, preserving the non-text elements such as images and tables.
	Snippet Manager. Displays Snippet Manager dialog where you can select snippet to insert or manage snippets.
	Save selection as snippet. Displays dialog to name selected text and save it as text snippet in Snippet Manager.
	Insert snippet code. Displays list of text snippets that you can insert into text. 
	Insert Symbol. Displays dialog to insert symbol into text.

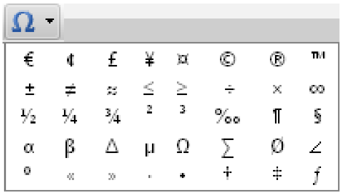
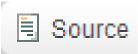
Rad Editor Icon	Description
	
	Help. Displays edit tools help dialog.
	Save As. Displays dialog to save text as new content item in content library.
	Save. Saves changes to existing content item in content library or displays dialog to save new text as new content item in content library.
	Cancel. Ends current function or closes editor.

CK Editor Icon	Description
	Check Spelling Checks the spelling and grammar of the text.
	Find Find text
	Replace. Replace text
	Select All Selects All Text
	Cut Cuts selected content and move to clipboard.

CK Editor Icon	Description
	Copy. Copies selected content to clipboard.
	Paste
	Paste Plain Text. Removes formatting of text and pastes as plain text into the editor.
	Paste from Word. Pastes content copied from Word, removing non-web tags.
	Remove Formatting Removes formats from highlighted text
	Undo. Undoes the last action.
	Redo. Redoes/repeats the last action that has been undone.
	Insert image. Displays the Insert Image from Library dialog where you select an image to insert into text container.
	Edit Image. Displays an image editing dialog for the selected image.
	Link to Library. Displays dialog to specify link target for selected text to content in Content Manager libraries or an external URL.
	Link Opens Dialog box to create hyperlinks to text anchors, URLs and email addresses 
	Unlink Removes selected link.
	Insert Anchor

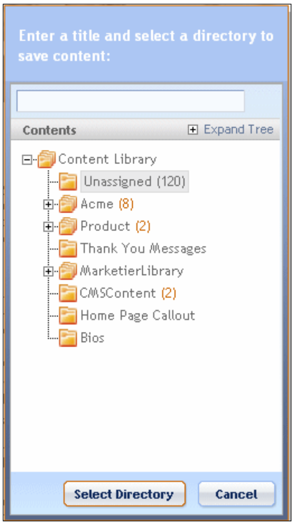
CK Editor Icon	Description
	Insert Flash From Library. Displays dialog to insert a Flash file from a Content Manager library and set its properties.
	Insert Product Image Opens a dialog where you can search for and choose a product to have its product image inserted on the page.
	Insert links to SharePoint assets such as images, page and files. You will need to have all appropriate permissions for any SharePoint content you wish to insert. **Note:** Once content is drawn in from a SharePoint library, it is not dynamically updated. This is to prevent changes to your SharePoint library if users in iAPPS make changes to the content. If there are changes to your SharePoint content, you will need to reimport the material into iAPPS.
	Translate highlighted text into additional languages. Remember that this is a basic translator and you may want to have your website content reviewed by a professional translator.
	Left Alignment. Aligns selected text to the left.
	Center Alignment. Aligns selected text to the center.
	Right Alignment. Aligns selected text to the right.
	Justify. Aligns selected text justified.
	Indent. Indents selected text to the right.
	Outdent. Indents selected text to the left.
	Numbered List. Inserts/removes a numbered list.
	Bulleted List Inserts/removes a bulleted list.
	Insert Table. Displays the table editor.

CK Editor Icon	Description
	
	Horizontal Rule. Inserts a horizontal rule.
	Apply CSS Class. Displays a list of available CSS classes available to format selected text. 
	Paragraph Format Shows the current style and displays a dropdown list of paragraph styles to apply to selected text, such as Header Size.
	Bold. Applies bold formatting to selected text.
	Italic. Applies italic formatting to selected text.
	Underline text. Applies underline formatting to selected text.
	Strikethrough Applies strikethrough formatting to selected text
	Insert subscript
	Insert superscript
	Text Direction from the Left
	Text Direction from the Right

CK Editor Icon	Description
	Insert Block Quote
	Insert div
	Insert Special Character Displays dialog to insert a symbol into text. 
	Show Blocks Displays individual paragraphs, and page divisions within the content area
	Save selection as snippet. Displays dialog to name selected text and save it as text snippet in Snippet Manager.
	View in Browser When working on an email in Marketier, inserting a View in Browser link allows users to quickly see the message in a web browser instead of their email program.
	Page Source Shows the source HTML for the relevant content area you are editing
	Help. Displays edit tools help dialog.
	Save. Saves changes to existing content item in content library or displays dialog to save new text as new content item in content library and then closes the toolbar and returns to Site Editor.
	Save As. Displays dialog to save text as new content item in content library.
	Cancel. Ends current function or closes editor.

The Editor Toolbar provides the following Save options:

Editor Save Option	New/Edited Text	Description
Save As	New/Edited	Creates a new text content item. A dialog appears in which you: • Select a directory in which to store this text item • Enter a title for the text in the dialog • Click Select Directory to save text item and close dialog.
Save	New	Creates a new text content item (as described for Save As option).
	Edited	Updates current text content item to reflect changes.



To close the editor toolbar:

Click the Close icon  in the corner of the toolbar.

Or, click the  icon in the text container.

Creating Link

You can use the Link icons to create a link to:

Link Icon	Description
	Links to: • A Page, File, or Image in the library • An external URL.
	Links to a: • Window – new, same, parent, or browser • Pane – search or media

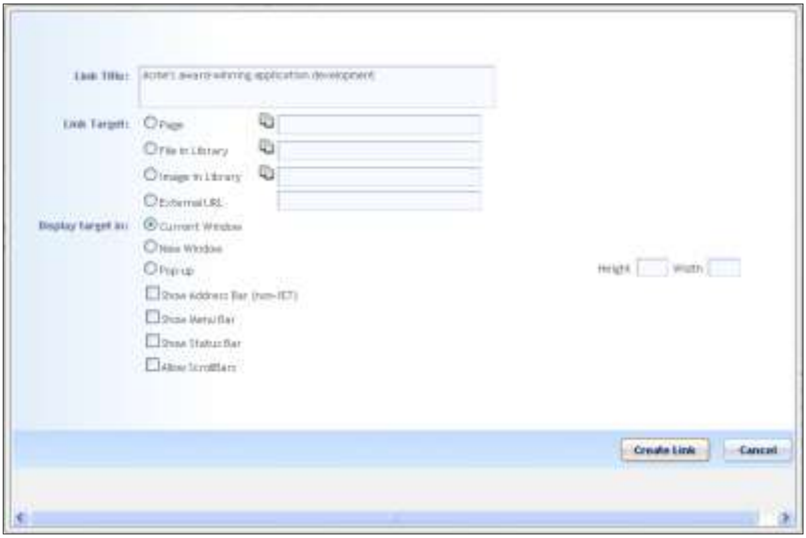
Link Icon	Description
	• Custom target • Anchor • An Email
	Removes an existing hyperlink.

Creating Link to Library

To create a link to an item in the library, follow these steps:

- Select (highlight) the text that you want to link to an item in the library, or an external URL.
- Click the Link to Library icon  in the editor toolbar.

  The Link to Library dialog appears.



- Click the radio button beside the target type (page, file, image, or external URL) to which you want to link the highlighted text.

- Click the Browse icon  to select the page, file, or image to which to link, or specify the external URL.
- Select the type of window (current, new, or pop-up) in which you want to display the linked item.
- Optionally, if you selected pop-up, specify Height and Width of the pop-up window.
- Click the checkbox beside any of the Show options to display.
- Click the **Create Link** button.

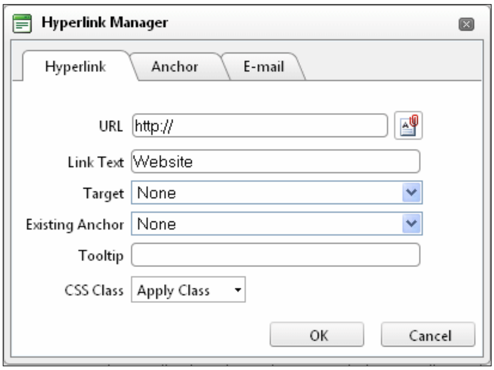
Creating Links to a Window, Custom Target, Anchor, or Email

To create a link within the text to a window, custom target, anchor, or email, follow these steps:

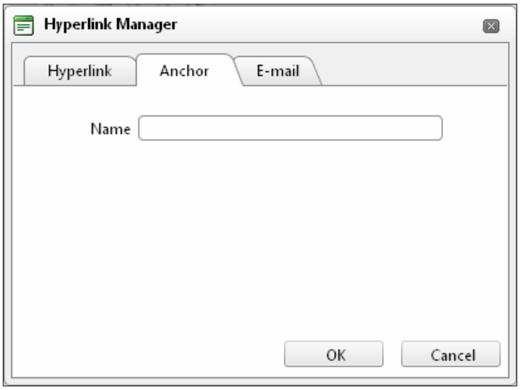
- Select (highlight) the text that you want to link to an item in the library, or external URL.
- Click the Hyperlink Manager  icon in the editor toolbar.

  The **Hyperlink Manager** dialog appears. It has a hyperlink, anchor and email tabs.

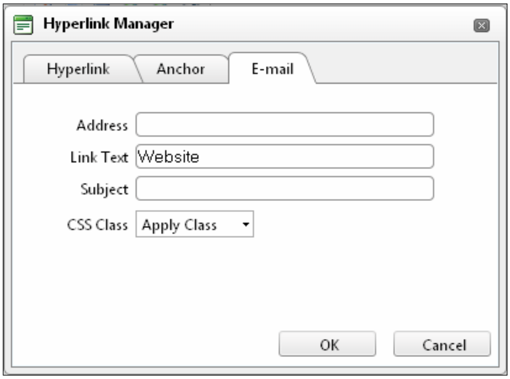
Hyperlink Tab



Anchor Tab



E-mail Tab



Specify the link target as described in the following table:

Tab	Field	Description
Hyperlink	URL	Click the document icon to select a document to use as the target of this link.
	Link Text	Enter the URL of a website to use as the target of this link.
	Target	Click the arrow in the pick list to select the type of window in which to display the target or to specify a custom target in which to

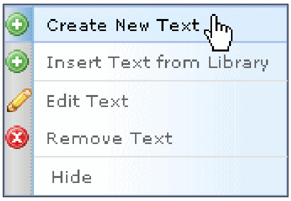
Tab	Field	Description
		display the target.
	Existing Anchor	Select an anchor to use as target of link. (Create anchors on the Anchor tab.)
	Tooltip	Tooltip text to appear when
	CSS Class	A CSS (Cascading Style Sheet) that creates formatting for the content.
Anchor	Name	Specify an anchor to use as link target and that you select in the Hyperlink tab.
E-mail	Address	Specify an email address to which to send an email as link target.
	Link Text	Text for link that appears in body of email that email recipient clicks to access link target.
	Subject	Text of email subject line.
	CSS Class	A CSS (Cascading Style Sheet) that creates formatting for the content.

Click the “OK” button to save and create your hyperlink.

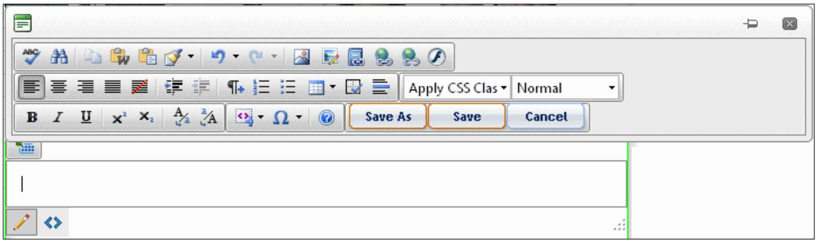
4.3.1.4 Creating New Text

To create new content, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click the text container in which you want to create content and select Create New Text.



The Toolbar appears:

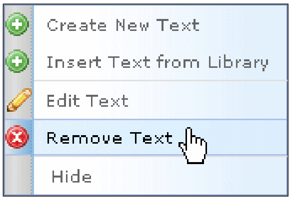


- Enter new content.
- Click the “Save As” button or the “Save” button.

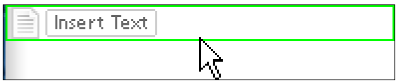
4.3.1.5 Removing Text Content

To remove text content, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click the content that you want to delete and select **Remove Text.**



- Content Manager deletes the text from the container and displays a container with an **Insert Text** message:



4.3.1.6 Hiding Text Content

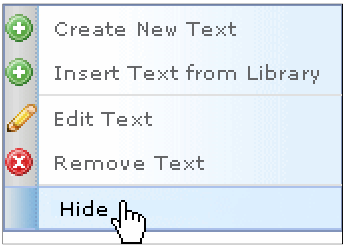
You can prevent text from displaying in a page by hiding it.

When you hide text, it displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes.

You can hide the text in a content area so that it does not display on the page.

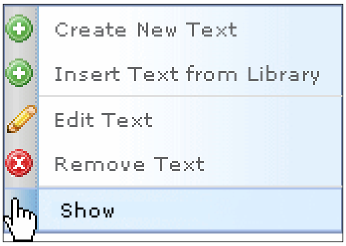
To hide text, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click the content that you want to hide and select Hide.

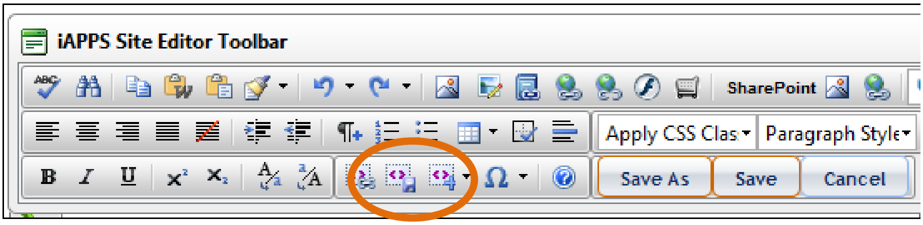


- The text now appears in **Site Editor** Edit mode, but not in Overlay or View as Live modes.

To display the text in all **Site Editor** modes, right-click the text and select Show.

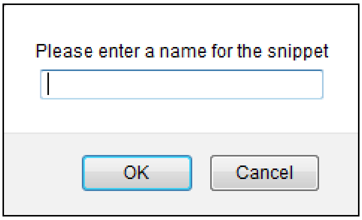


4.3.2 Creating Code Snippets



Code Snippets make formatting easier for material you use regularly and want to appear the same way every time. Once you have a section of text formatted the way you would like, you can highlight it and select **Save Selection as Snippet.** 

You can even use the HTML editor to help you format content before saving it as a code snippet.[Depending on which WYSIWYG editor you are using you can access the HTML for the page either by clicking the HTML Tab at the bottom or if you have no Tab, click “Source” in the tool bar.

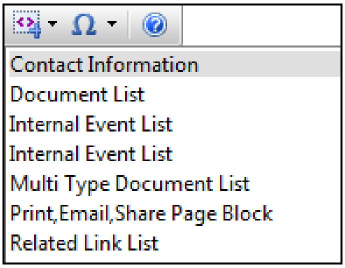


The system will prompt you to name your code snippet. Pick a meaningful name that will help others who might use the snippet know what it is.

The next time you want to use the material it will appear in the dropdown menu for **Insert Code Snippet**.

Right-click on the menu arrow and select the snippet you would like to use. (**Note:** if you simply click the **Insert Code Snippet** button it will automatically insert the last code snippet used.)

If your formatting is particularly complicated, your developer can also add code snippets for you.



4.3.3 Managing Content Definition Items

You can perform the following tasks with content definition items:

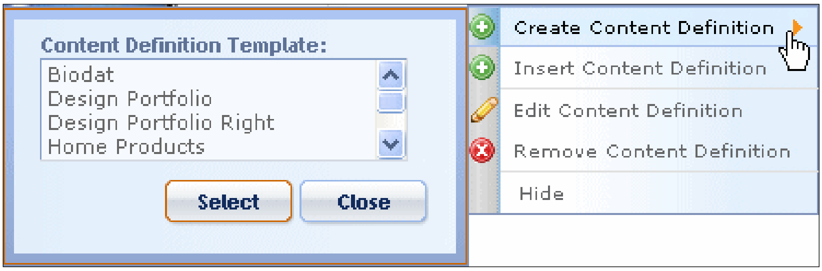
- Create Content Definition
- Insert Content Definition
- Edit Content Definition
- Remove Content Definition
- Hide/Show

4.3.3.1 Creating Content Definition

To create a content definition item, follow these steps:

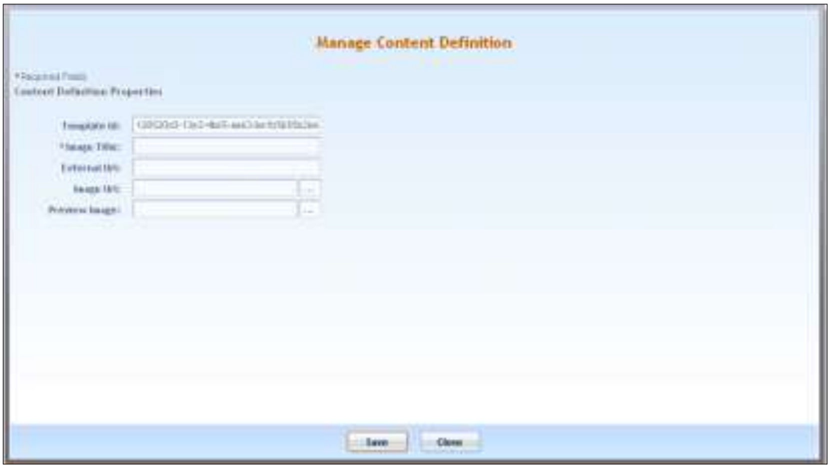
Click the Edit icon  on the **Site Editor** toolbar.

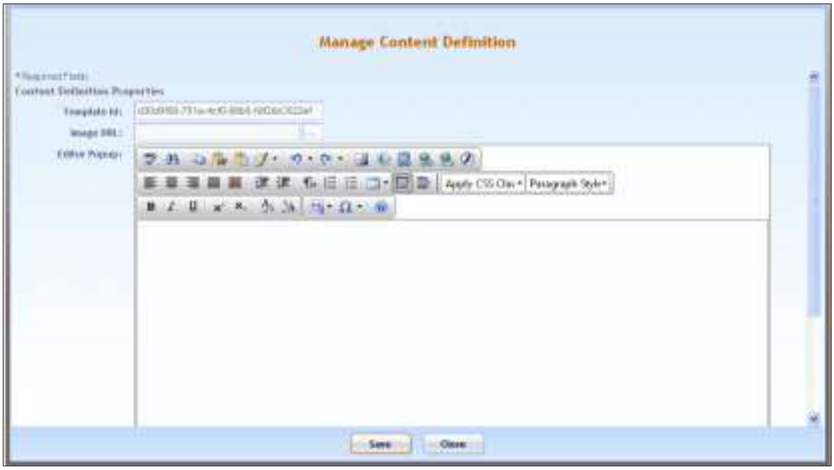
Right-click in a content definition container and select the arrow beside **Create Content Definition.**



Click on a ***Content Definition Template*** from the list and click “Select.” The **Manage Content Definition** dialog appears.

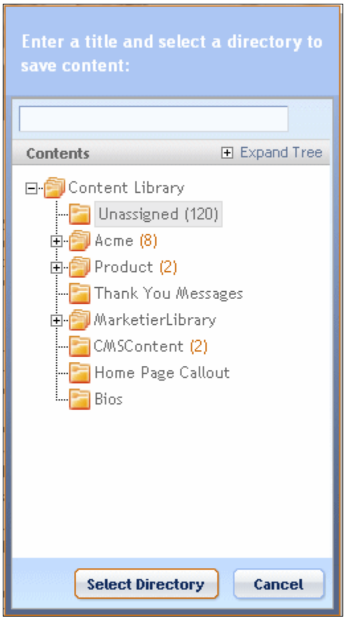
> ⓘ The appearance of the Manage Content Definition dialog varies depending upon the Content Definition Template that you choose. The figures below show two examples. You can check the custom iAPPS Template Guide you received at your training to find out more about what types of content definitions are available for your site implementation.





Complete the **Manage Content Definition** properties as appropriate.

Click the “Save” button. The **Save Content** dialog appears:



Select a directory in which to store this content definition, enter a title for it and click "Select Directory." Content Manager then:

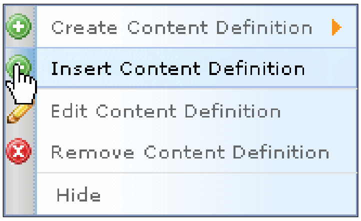
- Stores the content definition in the selected directory, and
- Displays the content definition in the content definition container on the page.

Your iAPPS Content Manager Administrator creates custom Content Definition properties for your iAPPS installation. For information on the available content definition properties, contact your Content Manager administrator.

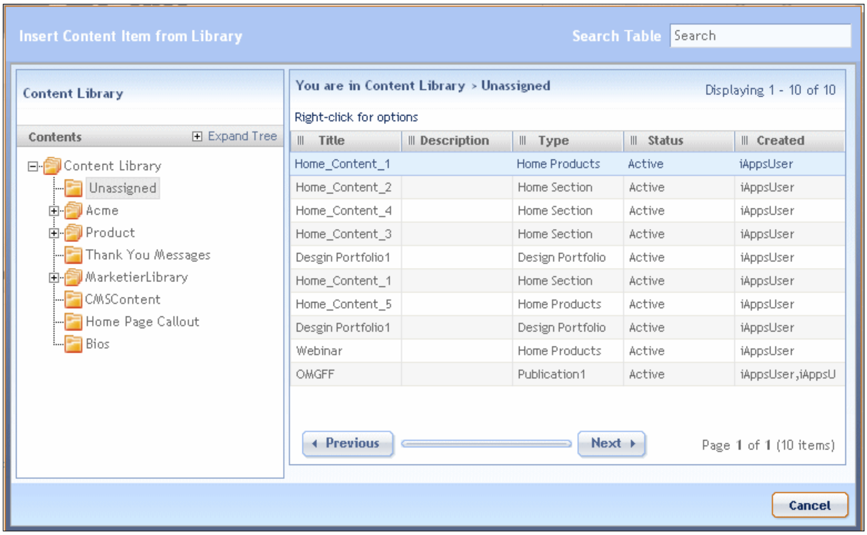
4.3.3.2 Inserting Content Definition Items

To insert an existing content definition item, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click in a **Content Definition** container.
- Select **Insert Content Definition.**



The **Insert Content Item from Library** container appears:



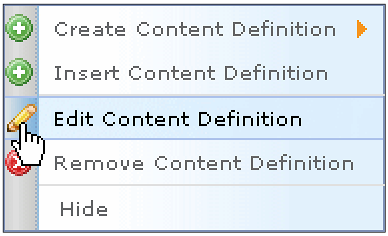
Right-click the content item that you want to insert and select **Insert Content**.

4.3.3.3 Editing Content Definition

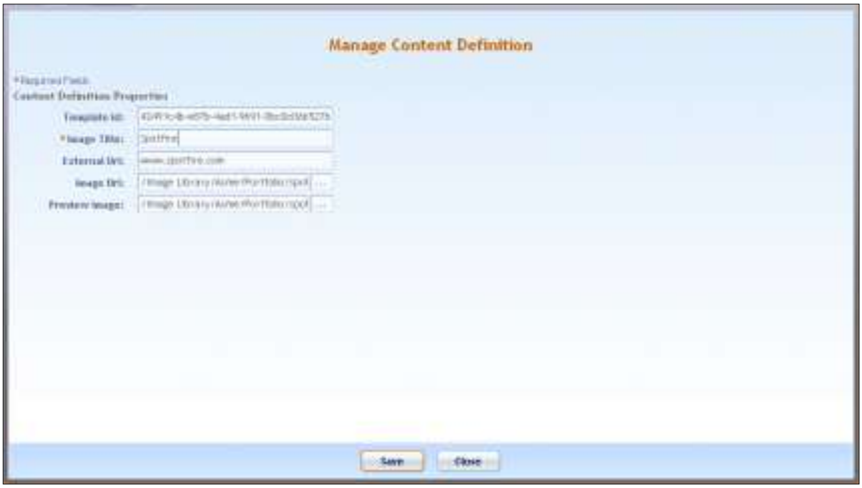
To edit an XML form, follow these steps:

Click the Edit icon  on the **Site Editor** toolbar.

Right-click in a content definition container and select Edit Content Definition.



A **Manage Content Definition** dialog appropriate to the selected type of content definition appears:



Edit Content Definition properties and content as necessary.

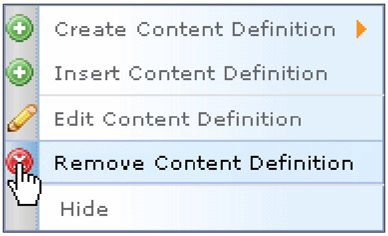
Click the “Save” button.

4.3.3.4 Removing Content Definition Item

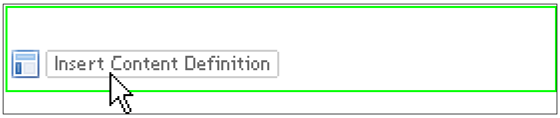
To remove a content definition item, follow these steps:

Click the Edit icon  on the **Site Editor** toolbar.

Right-click in the Content Definition container from which you want to remove a content definition and select Remove Content Definition.



An empty Content Definition container appears:



4.3.3.5 Hiding/Showing Content Definition Items

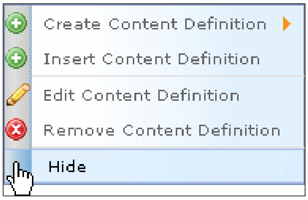
You can prevent a content definition item from displaying in a page by hiding it.

When you hide a content definition item, it displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes.

To hide a content definition item, follow these steps:

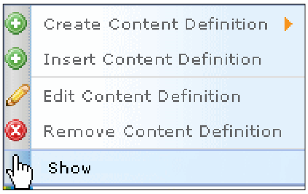
Click the Edit icon  on the **Site Editor** toolbar.

Right-click on the content definition item and select Hide.



The content definition item displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes.

To make the content definition item display in all modes again, right-click on the content definition item and select Show.



4.4 Managing Images

Images appear in image containers within a page template.

You can insert, delete and hide images in image containers.

> You can also insert multimedia files if your page template has been designed to hold multimedia, such as Flash and QuickTime. Please see your iAPPS System Administrator or Content Administrator for instructions on inserting multimedia files.

4.4.1 Inserting an Image from Library

To insert an image, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click an image container and select Insert Image from Library from the context menu.

The Insert Image from Library dialog appears.

- Locate the image in the Images Library.
- Right-click on the image and choose **Select Image.**

The selected image appears in the image container.

4.4.2 Removing an Image

To remove an image, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click the image and select **Remove Image**.

The deleted image no longer appears in the image container; the image container displays *Insert Image*.

4.4.3 Hiding/Showing an Image

You can prevent an image from displaying in a page by hiding it. When you hide an image, the image displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes. To hide an image, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar.
- Right-click the image and select Hide.

The image now appears in **Site Editor** Edit mode, but not in Overlay or View as Live modes.

To display the image in all **Site Editor** modes, right-click the image and select **Show**.

4.5 Inserting a List

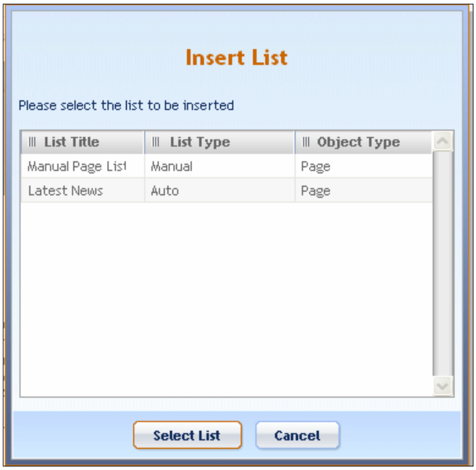
Content Manager provides the following types of lists that you can use in a Content list containers available in a page template.

- Page list
- File list
- Content list

In addition to inserting a list, you can also hide/show a list. To insert a list, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar.
- Right-click the list container and select Insert New List.

An Insert List dialog appears, displaying a list of the type of lists appropriate to the List Container you selected.



- Click on the list you want to insert.
- Click the **Select List** button.

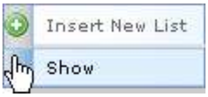
Content Manager inserts the list into the list container.

You can prevent a list from displaying in a page by hiding it. When you hide a list, it displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes. To hide a list, follow these steps:

- Click the Edit icon  on the **Site Editor** toolbar.
- Right-click the list and select Hide.

The list displays in the **Site Editor** Edit mode, but not in Overlay or View as Live modes.

To display the list again in all **Site Editor** modes, right-click the list and select **Show**.



Part II: Content Management Tasks

Part II of this guide explains how to perform content management tasks in iAPPS Content Manager by way of the main navigation menu.

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5 MANAGING MENUS

This chapter contains step-by-step instructions on how to manage the menu items within a site. Every site has a menu structure to enable users to navigate the website. Each menu item links to a single page in the website.

Every site has a *root menu,* which is usually named after the site. The root menu is created during site setup. This menu cannot be deleted.

A first-level menu added under the root menu is called a *menu group*. A menu group contains a group of menu items that share a common location. For example, a menu group named “topnav” contains menu items that are located in the top navigation menu. A menu group is invisible to website users.

5.1 Working with Menus

You can work with menus from:

- **Site Editor**
- **Menus and Pages** library

From **Site Editor** you can:

- Rename
- Remove
- Add a sub-menu item
- Connect existing page to menu item
- Create and connect new page to menu item
- Edit and view menu item properties

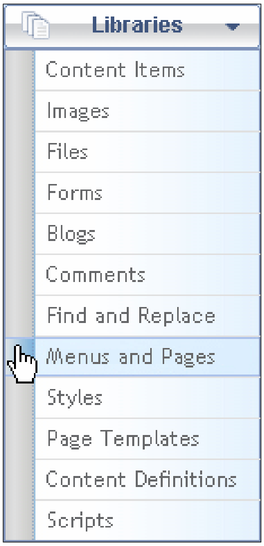
In addition, from the **Menus and Pages** library, you can also:

- Set as home
- View/Edit permissions

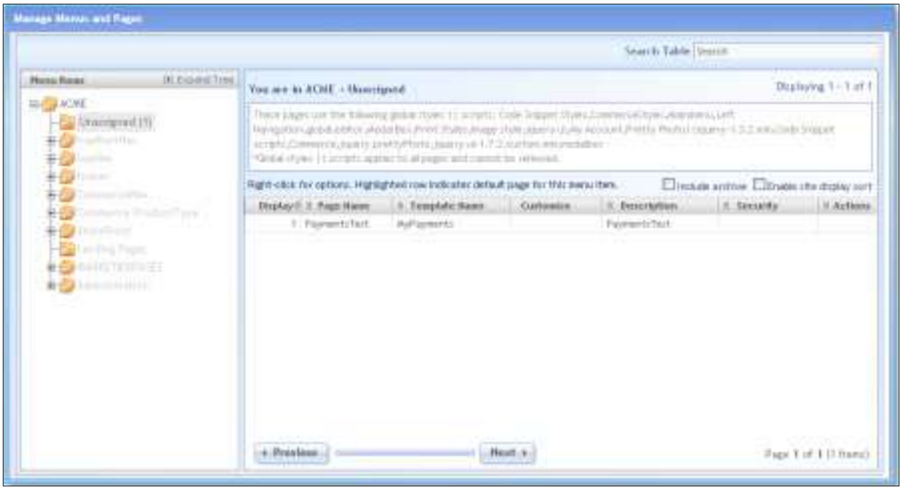
To manage menus in **Site Editor**, click the “Edit” icon on the toolbar:

The menu becomes editable as indicated by the green border that highlights the area when you roll the cursor over it.

Otherwise, select **Libraries → Menus and Pages** from the main navigation menu.



The **Manage Menus and Pages** container appears:



The **Manage Menus and Pages** container displays:

- Menu groups and menu items in the tree on left
- Pages associated with a menu item in the list on right.

You can work with a menu item or page by right-clicking it and selecting an action from the right-click menu options.

5.2 Managing Menu Items

You can manage menu items from:

- Site Editor
- Menus and Pages Library (**Libraries → Menus and Pages**)

To manage the menu items of a site, you can perform the following tasks:

Menu Right-Click Option	Site Editor	Menus and Pages Library	Top / Sub Menu Item
Add sub-menu item	✓	✓	Any
Rename menu item	✓	✓	Any
Remove/Delete menu Item	✓	✓	Any

Menu Right-Click Option	Site Editor	Menus and Pages Library	Top / Sub Menu Item
Edit properties	✓	✓	Any
Make Invisible		✓	Sub-menu
Set as home		✓	Sub-menu
View/Edit Permissions		✓	Sub-menu
Connect existing page to menu item	✓		Any
Create new page and connect to menu item	✓		Any
Create new page	✓	✓	Any

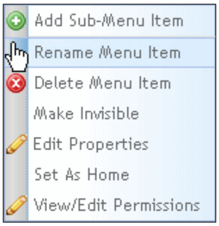
This section describes the right-click context menu items available from the **Manage Menus and Pages** libraries including:

- Add a sub-menu item
- Rename a menu item
- Delete a menu item
- Make invisible
- Edit properties
- Set as home
- View/Edit permissions

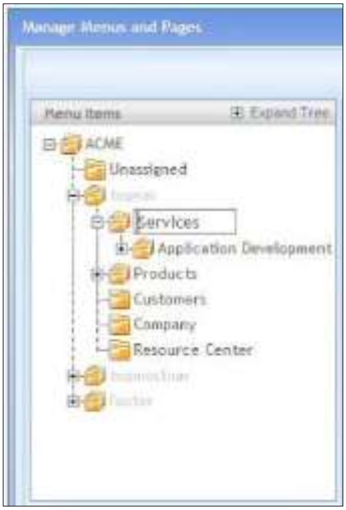
5.2.1 Renaming a Menu Item

Only Users with the Content Administrator or Nav Editor role can rename a menu item. To rename a menu item, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it. Locate the menu item you want to rename.
- Right-click the menu item and select **Rename Menu Item**.

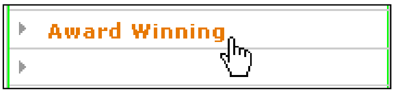


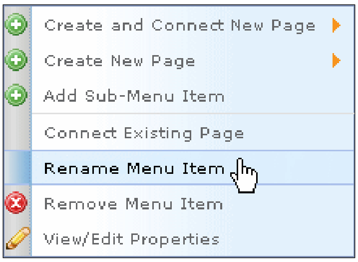
- Edit the menu item name and press the Enter key to save.



Alternatively, you can

- Click the Edit icon on the **Site Editor** toolbar. 
- Right-click a menu item and select **Rename Menu Item**.





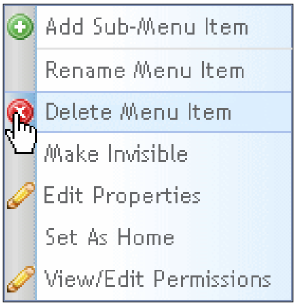
- Enter the new name and press the Enter key.

The menu item displays in the list with the new name.

5.2.2 Deleting a Menu Item

Only users with the Content Administrator or Nav Editor role can delete a menu item. To delete a menu item, follow these steps:

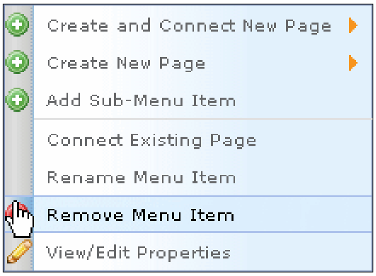
- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it. Locate the menu item you want to delete.
- Right-click the menu item that you want to delete and select **Delete Menu Item**.



- Content Manager displays a confirmation dialog. Click the “OK” button to confirm that you want to delete the menu item or “Cancel” to keep it.

Alternatively, from Site Editor, follow these steps:

- Click the Edit icon on the toolbar. 
    - Right-click a menu item and select **Remove Menu Item**.

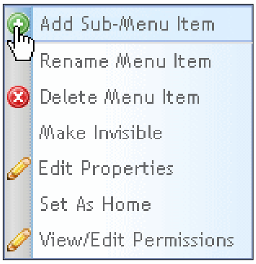


- A confirm dialog appears. Click the “OK” button to remove the menu item or “Cancel” to keep it:

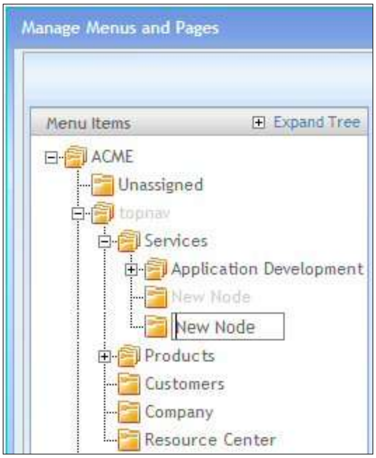
5.2.3 Adding a Sub-Menu Item

Only users with the Content Administrator or Nav Editor role can add a sub-menu item. To add a menu item, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it.
- Locate the menu item to which you want to add a sub-menu item.
- Right-click the menu item and select **Add Sub-Menu Item**.



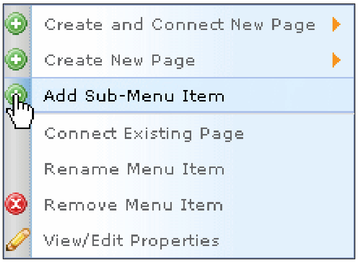
Type in the name of the new sub-menu item and press the Enter key to save.



The new sub-menu item appears under the menu group.

Alternatively, from Site Editor, follow these steps:

- Click the Edit icon on the **Site Editor** toolbar. 
- Right-click a menu item and select **Add Sub-Menu Item**:



- Type in a name for the sub-menu item and press the Enter key.

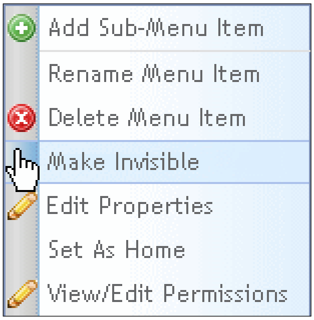
The new menu item displays in the list.

5.2.4 Making a Menu Item Invisible

Only users with the Content Administrator or Nav Editor role can make a menu item invisible. You can make a menu item invisible so that website users will no longer see it live on the site. (You will still be able to see the menu item in Edit mode in **Site Editor**.)

To make a menu item invisible, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it.
- Locate the menu item that you want to make invisible.
- Right-click the menu item that you want to make invisible and select **Make Invisible**.

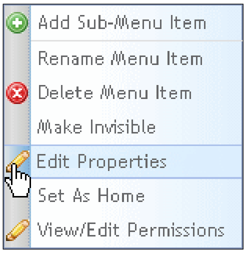


- To make a menu item visible again, right-click the menu item and select **Make Visible**.

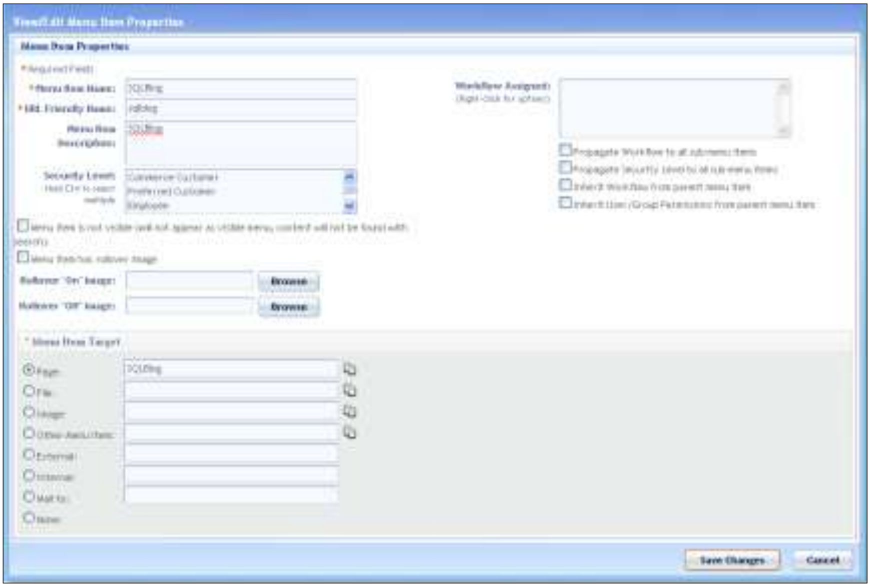
5.2.5 Editing Properties of a Menu Item

Only users with the Content Administrator or Nav Editor role can edit the properties of a menu item. To edit the properties of a menu item, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it.
- Locate the menu item for which you want to edit properties.
- Right-click the menu item and select **Edit Properties**.



The **View/Edit Menu Item Properties** container appears.



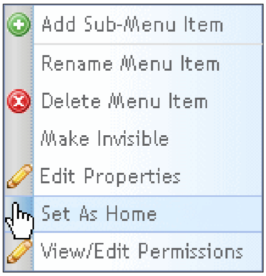
- Edit the Menu Item properties as necessary. Options include
  - Name
  - SEO Friendly Name, if different
  - Description
  - Security Level
  - Visibility on front end
  - Rollover image (optional)
  - Menu Target (such as another page)
  - Workflow Assigned.
- Click the “Save Changes” button to save your changes.

5.2.6 Set as Home

ⓘ Only users with the Content Administrator or the Nav Editor roles can set a page attached to a menu item as the home page of the site.

To set a menu item as home, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it.
- Right-click the menu item to which the page you want to set as the home page is connected and select **Set As Home**.



Content Manager displays a confirmation dialog:

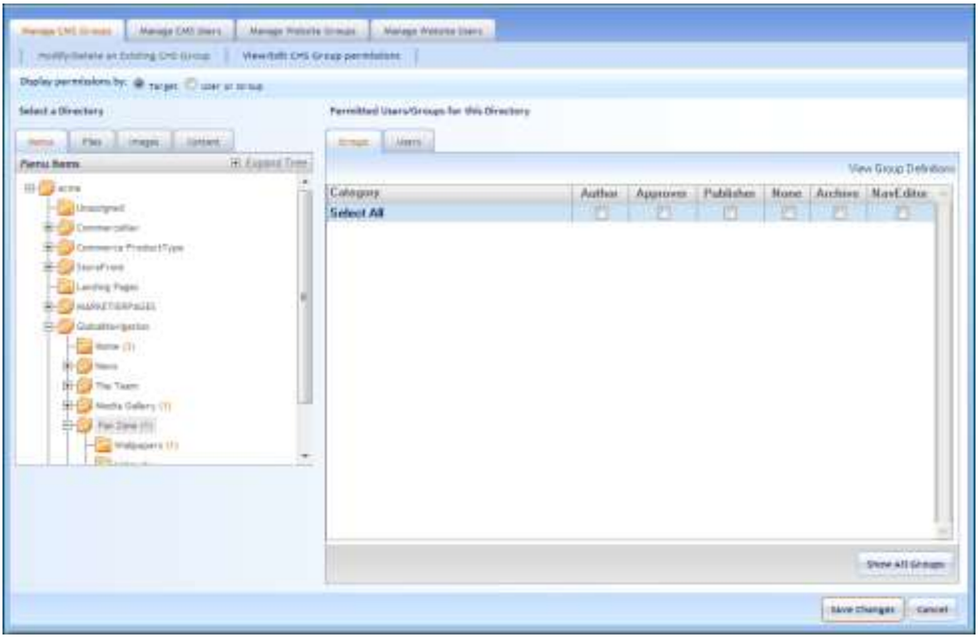
- Click the “OK” button to set the page connected to this menu item as the home page. Now all visits to the main domain name (www.company.com) will reach that page first.

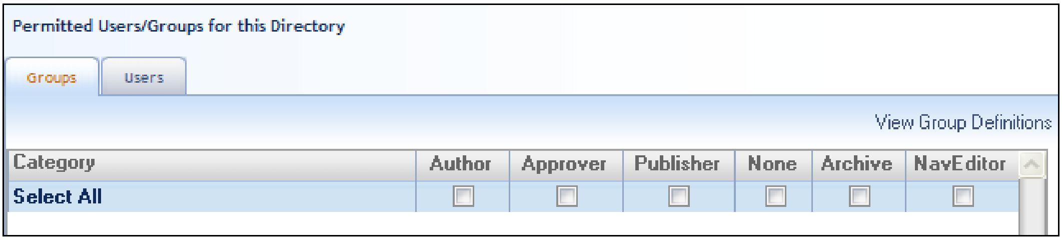
5.2.7 View/Edit Menu Item Permissions

Only users with the Content Administrator or Nav Editor role can view and edit permissions of a menu item. To view/edit menu item permissions, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Click the **+** to the left of a Menu Group to expand it.
- Locate the menu item to view or edit permissions

- Right-click the menu item and select **View/Edit Permissions.** The **User Administration** container appears with ***Manage CMS Groups*** active. From here you can choose either the ***Groups*** or the ***Users*** tab.





- View and edit the menu item permissions as needed.
- You can set permissions to edit items within that menu node and to edit the menu itself separately. Check “NavEditor” to allow menu edits. This means you can have users that can create and publish content within the node, as well as to add pages in that section of the site, but who would not be able to change the name of the menu item or set a page within it as home.
- Click the “Save Changes” button when you are finished.

6 MANAGING PAGES

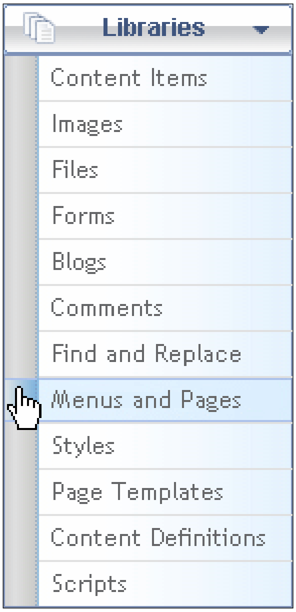
This chapter contains instructions for managing pages. The following table lists the actions available for managing pages from Menus and Pages Library and **Site Editor**:

Page Action	Available in Site Editor	Available in Menus and Pages Library
Add Page	✓	✓
Jump to Page in Editor		✓
Edit Page Properties	✓	✓
Connect the Page to Menu Item	✓	✓
Assign Index Terms	✓	✓
Delete Page	✓	✓
Delete this version of page	✓	
View Page History	✓	✓
Save as Draft	✓	
Archive Page	✓	✓
Submit Page into Workflow	✓	
Publish page	✓	✓
Include Page in RSS Channel	✓	
Move to top of display order	✓	✓
Move to bottom of display order	✓	✓

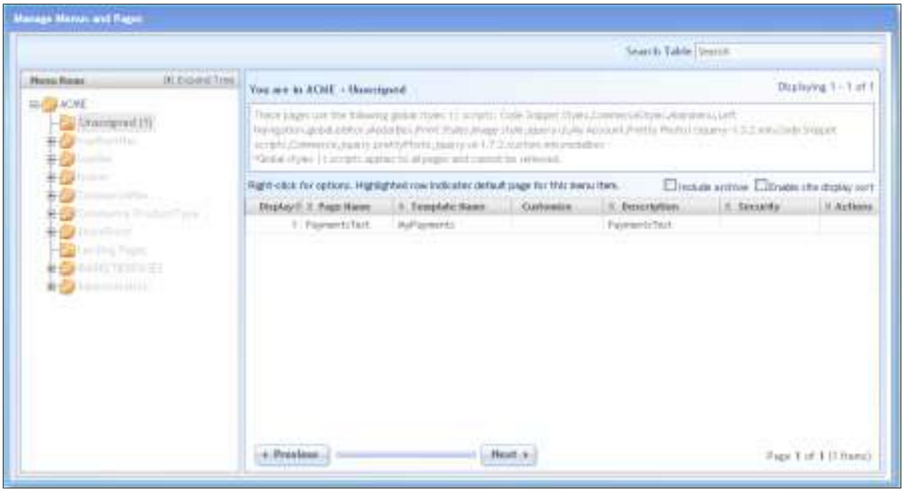
To manage pages, you perform the following tasks:

- Add a page
- Jump to a page in the **Site Editor**
- Edit page properties
- Connect a page to a menu item
- Assign index terms to a page
- Delete a page
- View page history
- Archive
- Publish now

To access the Menus and Pages library, select **Libraries → Menus and Pages** in the main navigation menu.



The **Manage Menus and Pages** container appears:



The **Manage Menus and Pages** container displays:

- Menu groups and menu items in the tree on left
- Pages associated with a menu item in the list on right

To work with a page:

- Click **+** to the left of a Menu Group to expand the list.
- Click on a menu item to view a list of the pages stored under it.
- Right-click on a page in the page list and select the appropriate options.

6.1 Adding a Page

You can add a page to a menu item from:

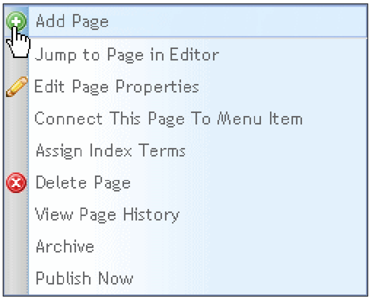
- Menus and Pages Library
- **CMS Control Center → Add a Page** container
- Right-clicking on a Menu item in Site Editor and choosing **Create and Connect Page.**

This section describes adding a page from the Menu and Page Library

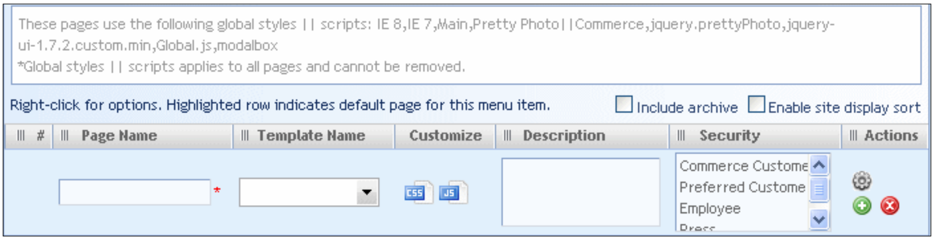
To add a page, follow these steps:

- Select **Libraries → Menus and Pages** in the main navigation menu.

- Click on the menu item in the menu item tree, on the left of the Menu and Pages Library page, to which you want to add a page.
- In the Pages list on the right, right-click on any row and select **Add Page**.

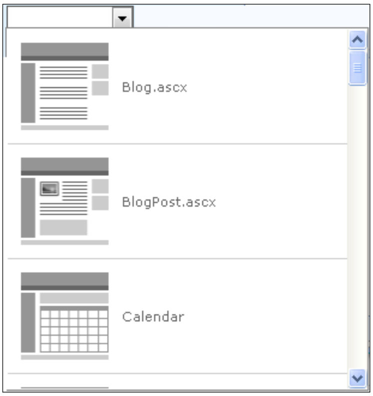
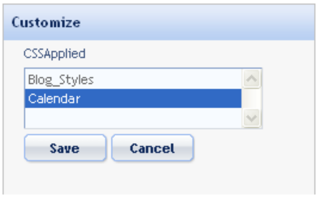
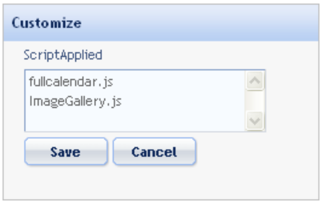


This will open editable page property fields:



- Enter page information as follows:

Page Field	Description
Page Name	Enter a unique name for this page.
Template Name	Click the arrow in the Template Name list and select a page template to define the layout of this page.

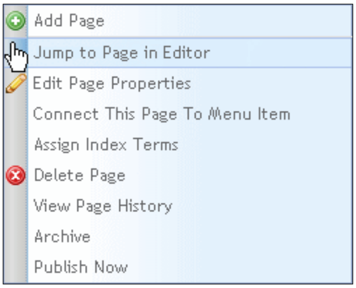
Page Field	Description
	
Customize	Optionally, select a custom CSS or Script for this page. Click the “CSS” or “JS” button. A CSSApplied or ScriptApplied dialog appears.  - Select a CSS or JS file to apply to this page. - Click “Save.”
Description	Enter a description of content or use of this page.
Security	Scroll through the security pick-list and click on a security level to assign to this page. Optionally, press Ctrl-click to select more than one security level.

- Click  to save the page. The new page appears in the page list.

6.2 Jump to Page in Editor

Only users with the Content Administrator, Author, Approver, or Publisher role can jump to a page in the **Site Editor**. To jump to a page in **Site Editor**, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click the page and select **Jump to Page in Editor**.

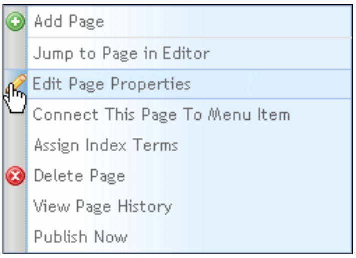


Content Manager opens the page in **Site Editor**.

6.3 Editing Page Properties

Only users with the Content Administrator, Author, Approver, or Publisher role can edit page properties. To edit page properties, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click on a page and select **Edit Page Properties**.



The page properties become editable:

- Edit page properties as necessary.
- Click the Save icon to save changes.

6.4 Managing Search Engine Optimization (SEO)

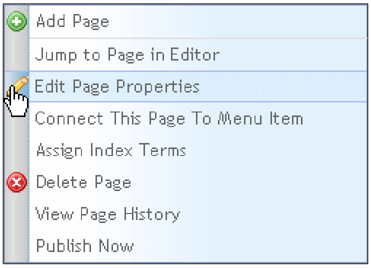
Search Engine Optimization (SEO) is a practice used to enhance organic traffic for a website. Good SEO helps your site rank higher in results lists from search engines such as Google and Bing.

SEO involves two main pieces: strategy and tactics. A strategy must be put together by people, but iAPPS can play a large role in helping you with the tactics of SEO, especially by helping create structure for your site content that Google understands.

Managing SEO for your site is a complicated process. See the *iAPPS User Scenario Guide* for more information on ensuring your site is SEO friendly or you can contact Bridgeline's Digital Strategy group for aid in a custom SEO strategy for your site.

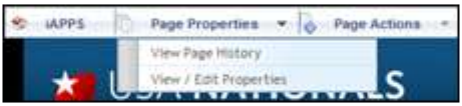
There are also things you can do to adjust SEO settings for individual pages. To manage SEO information, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click on a page and select **Edit Page Properties**.

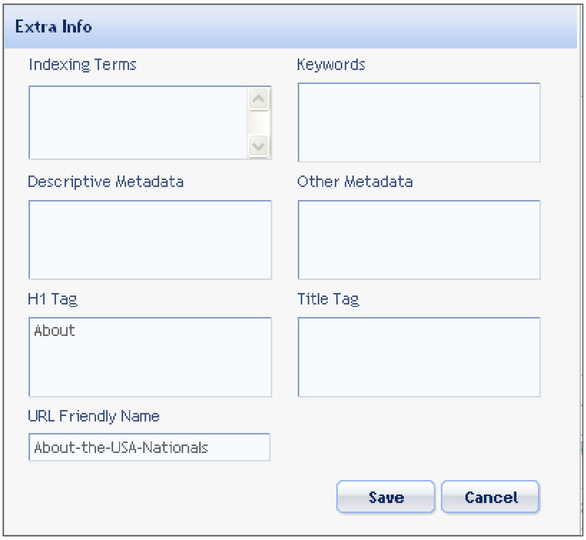


The page properties become editable.

ⓘ You can also reach Page Properties by through the Site Editor Menu



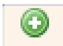
- Click . The Extra Info dialog appears, displaying SEO information fields:



- Edit the SEO fields as described in the following table:

SEO Field	Description
Indexing Terms	Index terms for the page. You can use index terms to relate content, pages, images, files and users to each other for personalized content or to generate automatic lists. See your site's custom implementation guide for more details on your organization's implementation of index terms.
Descriptive Metadata	The descriptive metadata for the page. This is a primary field for search engine and often displays in search results. Meta-descriptions give website users a brief explanation as to what a page is about. Meta-descriptions should be no longer than 150 characters and should have keywords appear as early as possible as often only the first 40 characters appear in search results.
H1 Tag	The H1 heading for the page
URL Friendly Name	Name of the page as it appears in the browser's URL address bar. The path is automatically specified based

SEO Field	Description
	on the site’s menu hierarchy, but you can change it.
Keywords	The keywords that you want to appear regarding the page’s content. Keywords are counted less by the search engines now but are still important.
Other Metadata	Other metadata (besides descriptive) that you want to include, such as a canonical metatag. (See the FAQs for a full description.) You can also have a metatag telling the search engines not to index the page.
Title Tag	The Page Title Tag. Page Titles are the short descriptions that appear on the top of a browser window and also within Search Results Page Titles should be no longer than 65-70 characters and should include a keyword heavy description of the page followed by the brand name.

- Click the “Save” button to save SEO information. The Extra Info dialog closes.
- Click the Save icon  to save changes to this page.

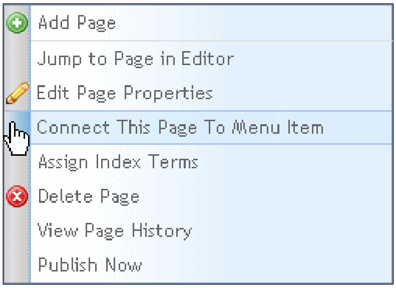
6.5 Connecting Page To / Disconnecting Page From a Menu Item

Only one page can be connected to a menu item. You can use the following methods to determine which page is connected to a menu item:

View Page Connection Option	Description
Page list	The page connected to a menu item appears highlighted in yellow in that menu item’s page list.
Menu-list properties	View the *Menu Item Target* section of a menu item’s properties to see which page, if any, is connected to that menu item.

To connect a page to a menu item, follow these steps:

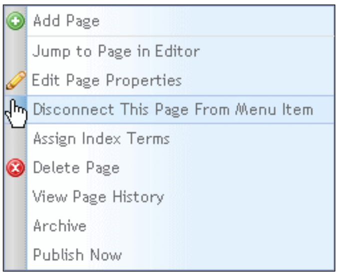
- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click the page you want to connect to a menu item and select **Connect This Page to Menu Item**.



The page connected to the menu item appears in the page list highlighted in yellow.

#	Page Name	Template Name	Customize	Description	Security	Actions
1	Team Photos	Media Gallery				
2	PR1	Contact Us				

- To change the page connected to a menu item either:

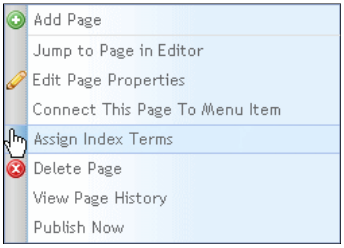
Connect Another Page	No Page Connected
Repeat the steps above to select a new page to connect to this menu item. Content Manager connects the selected page and automatically disconnects the previously connected page. The page list displays the connected page highlighted in yellow.	Right-click on the currently connected page (highlighted in yellow) and select **Disconnect This Page From Menu Item.**  Content Manager disconnects this page from the menu item and removes highlighting.

6.6 Assigning Index Terms to a Page

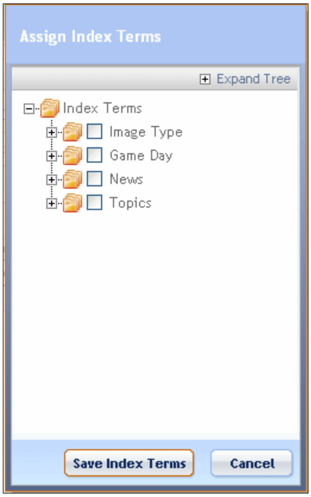
You can assign Index Terms (a tag that you can use programmatically to aggregate pages or filter lists) to pages.

To assign index terms to a page, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click the page and select **Assign Index Terms**.



The ***Assign Index Terms*** dialog appears:

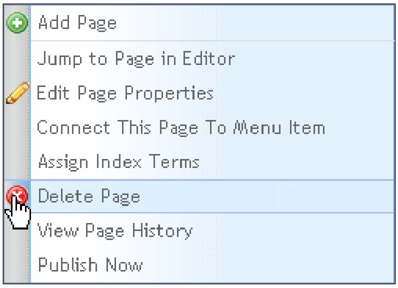


- Click **+** to expand the list of Index Terms.
- Click the check box beside the Index Term folder or individual Index Term to add to this page. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
- Click “Save Index Terms.”

6.7 Deleting a Page

To delete a page, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- In the list of pages, right-click the name of the page and select **Delete Page**.



A ***Warning*** dialog appears:

- Click the “Delete Page” button. A confirmation dialog appears. Click “OK”.

  The selected page no longer appears in the page list.

6.8 Viewing Page History

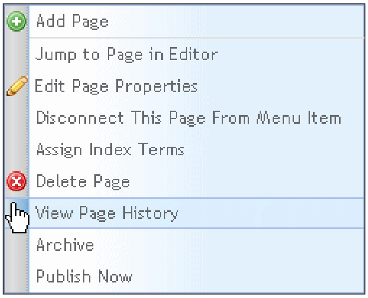
You can view a list of previous versions of a page in the **Page History** container.

From the **Page History** container, you can:

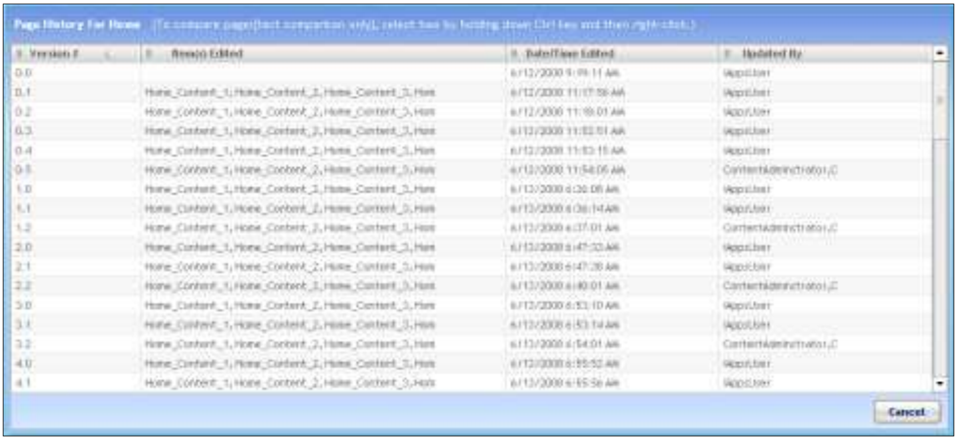
- Rollback to previous version
- Compare two versions

To view a page's history, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- In the list of pages, right-click the name of the page and select **View Page History.**



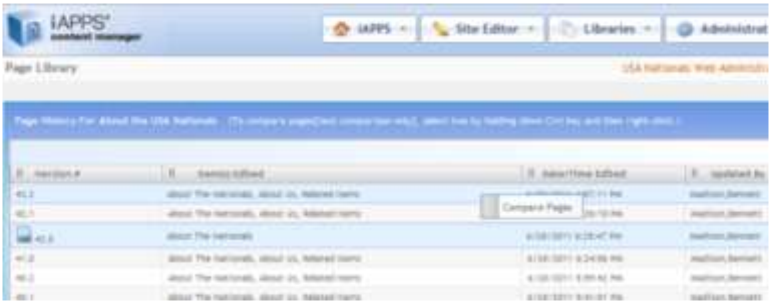
The **Page History for *Pagename*** container appears:



- View the page history in the list.
- Click the "Cancel" button to return to the **Menus and Pages** library.

Also in the Page History container, you can compare the content on two versions of the page.

- Select the two pages by clicking on the row while holding down the Control Key and then right-click and select **Compare Pages.**



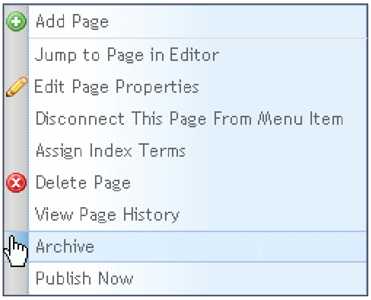
6.9 Archiving a Page/Making an Archived Page Active

You can archive a page that has previously been published to make it no longer visible on a site. Once a page has been published, you can only archive it, not delete it.

> ⓘ You can archive only pages that have been published.

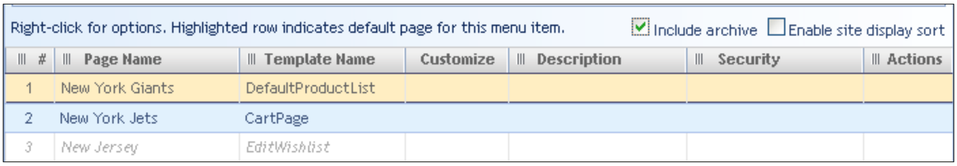
To archive a page, follow these steps:

- Select **Libraries → Menus and Pages** from the main navigation menu.
- Right-click the name of the page in the Page list and select **Archive**.

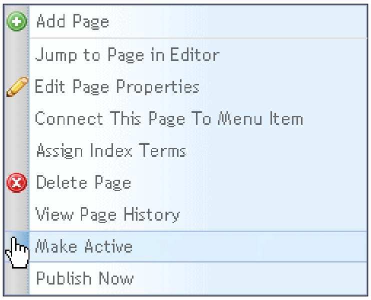


The page no longer appears in the Page list.

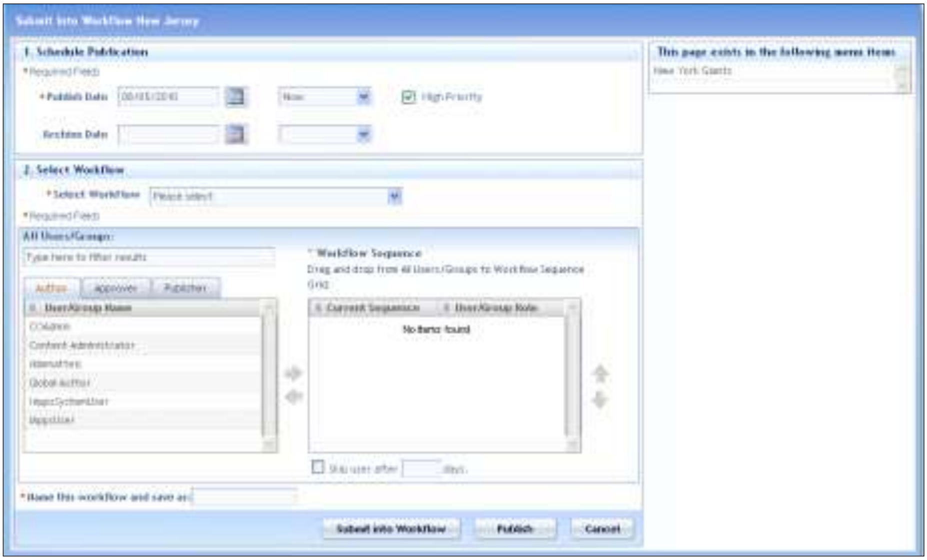
To view archived pages in the Page list, click the “Include Archive” check box. Archived pages display in the list in an *Italic* font when not selected:



To make a page active again, right-click on an archived page in the list and select **Make Active**.



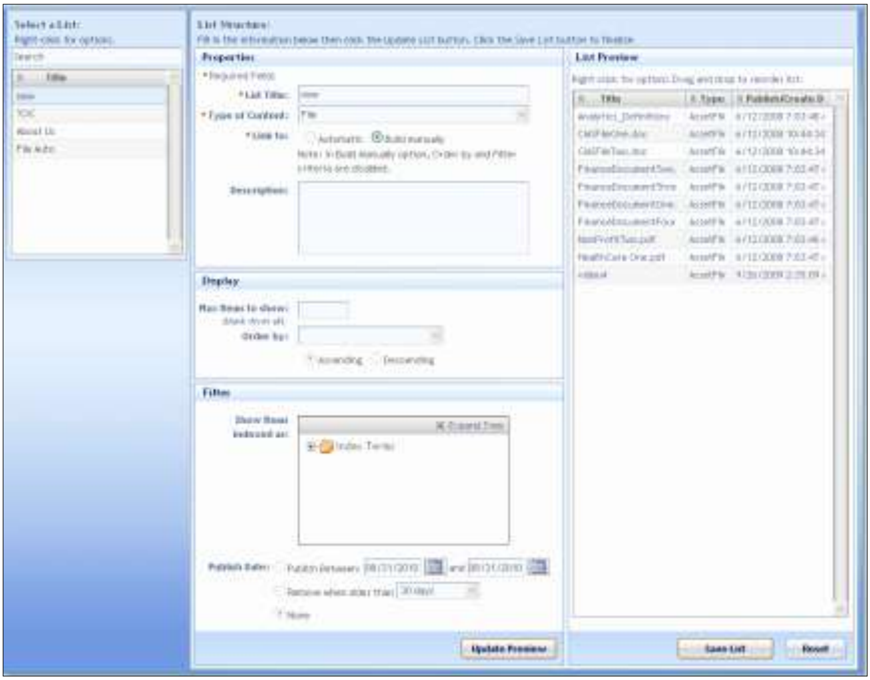
The **Publish Workflow** container appears. Select the appropriate workflow for this page.



7 MANAGING LISTS

This chapter contains step-by-step instructions for how to create and manage lists that you can use in pages throughout your site. To manage lists, select **Administration → Lists** from the main navigation menu.

The **Manage Lists** container appears, displaying information about the first list in the Select a List pane:



The **Manage Lists** container includes the following sections and right-click options for managing lists:

Manage List Pane	Description	Right-Click Options
Select a List	A pick-list displaying the existing lists.	• Add new list • View/Edit list • Delete list
Properties	Basic properties of the list including list item content	N/A

Manage List Pane	Description	Right-Click Options
	type.	
Display	Options for controlling how list displays on a page.	N/A
Filter	Index terms and publishing options for list.	N/A
List Preview	Displays list items for this list.	Automatic • Create new content of the content type selected for this list Manually Built • Add list Items • Create new file • Delete list items

7.1 Adding a New List

You can create the following types of lists:

Automatic	Content Manager automatically creates list items of all of the contents of the Content Items, Images, Files, or Menus and Pages library directory that you select.
Manual	Allows you to manually select list items in a Content Items, Images, Files, or Menus and Pages libraries directory or from a combination of these libraries.

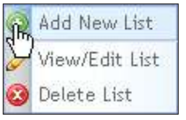
The following sections describe how to create each type of list.

7.1.1 Adding an Automatic List

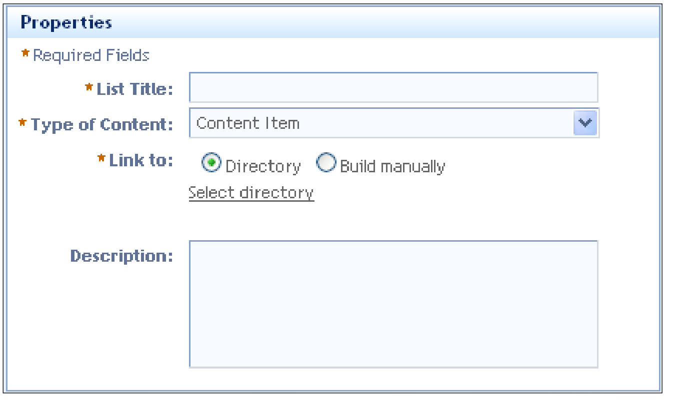
To add a new automatic list, follow these steps:

Select **Administration → Lists** from the main navigation menu.

Right-click any list and select Add New List.



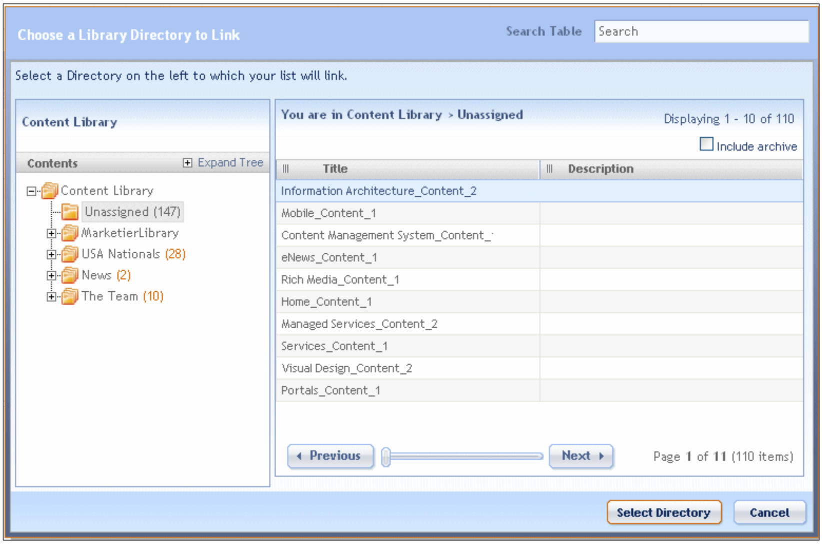
A blank List Properties page appears:

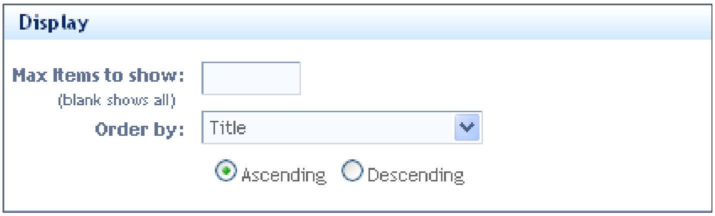


Specify the list properties as described in the following table:

List Property	Description
List Title	Enter a title to name this list.
Type of Content	Click the arrow in the pick-list to select the type of content to use as items for the list. Choices include: Content item, image, file, page, or Combo. **Note**: If you select Combo, Content Manager automatically selects the Build Manually radio button, as you can use various types of content as list items only for a list built manually.
Link to:	Specifies type of list to create:

List Property	Description
	• Click the Directory or Menu Item (if page selected as content type) radio button. • Click the Select Directory or Menu Item (if page selected as content type) link . **The Choose a Library Directory to Link** dialog appears, displaying the library associated with the type of content you selected in the *Type of Content* field. • Click on the directory which contains the content you want to use as items for this list. • Click the **Select Directory** button. The directory path you selected appears after Link to:
Description	Enter a brief description of the contents or use of this list.





- Specify the display options as described in the following table:

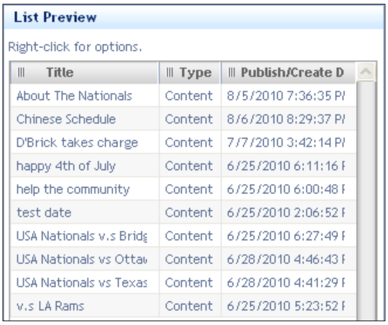
Display Option	Description
Max Items to Show	Enter the maximum number of the contents from the selected directory to display as list items. Leave field blank to display all contents.
Order by:	• Click the arrow in the Order by pick-list to specify the criteria by which to order contents from the selected directory: Title, Description, or Creation Date. • Click the appropriate radio button to select to display content items in ascending or descending order according to the order by criteria.

- Specify the filter options as described in the following table:

Filter Option	**Description**
Show Items indexed as	Optionally, specify filter terms to use for this list: • Click + to the left of Index Terms to expand the list. • Click the check box beside the Index Term folder or individual index term to add it to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
Publish Date	Optionally, specify a publish date on which this list will be available for use throughout Content Manager using one of the following options: Publish Between • Click the *Publish Between* radio button to specify a publish date range. • Click the calendar icons to specify the beginning and ending dates of the range. Remove When Older Than • Click the *Remove When Older than* radio button. • Click the arrow in the pick-list to specify an older than term. None • Click the *None* radio button to not specify a publish date.

- Click the **Update Preview** button.

  Content Manager populates the List Preview pane with a list of list items representing the content of the selected directory. Click “Save List” or “Clear Form” when finished.

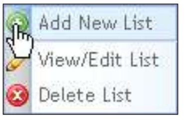


Save List	Clear Form
Click the “Save List” button at the bottom of the container. The title of the list you created appears in the Select a List pane.	Click the “Clear Form” button. A dialog appears, prompting you to confirm this action. Click the “OK” button. A blank **List Properties** container appears.

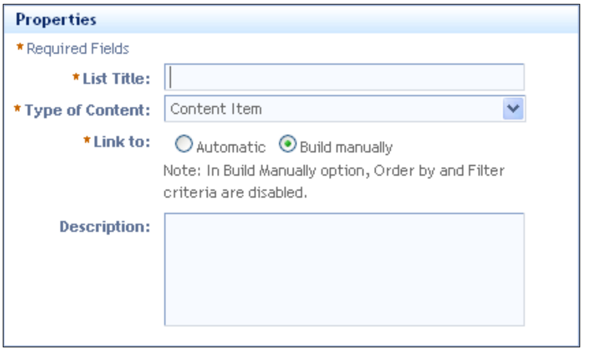
7.1.2 Adding a Manually-Built List

To add a new list that you build manually, follow these steps:

- Select the **Administration → Lists** from the main navigation menu.
- Right-click any list and select **Add New List**.



A blank Properties pop-up appears:

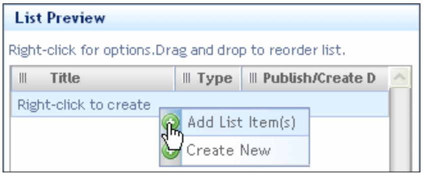


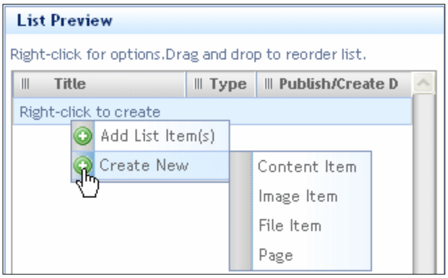
- Specify the list properties as described in the following table:

List Property	Description
List Title	Enter a title to name this list.

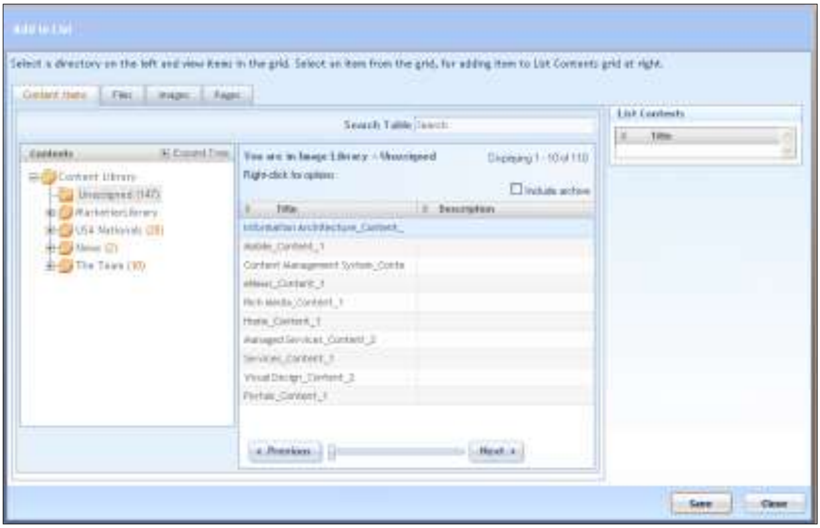
Type of Content	Click the arrow in the pick-list to select the type of content to use as items for the list. Choices include: Content item, image, file, page, or Combo. **Note**: If you select Combo, Content Manager automatically selects the Build Manually radio button, as you can use various types of content as list items only for a list built manually.
Link to:	Specifies type of list to create. Click the *Build Manually* radio button.
Description	Enter a brief description of contents or use of this list.

- Click the “Update Preview” button. The title of the list you created appears in the Select a List pane.
- To add items to the list, right-click on the ***Right-click to create*** line in the List Preview pane and select either **Add List Item** to add existing items from the library or **Create New** to create new content in a library





For Add To List items, an **Add to List** dialog appears, displaying the library for the content type selected for this list, or all of the appropriate Data Libraries if *Combo* is selected as content type:



- Search through the library to locate the content to add as an item to the list.
- Right-click on an item and select **Add to List** to select it. The title of the selected item appears in the List Contents pane.

- When you finish selecting all items to include in the list, click the “Save” Button. The selected items appear in the List Preview Pane.

7.1.2.1 Creating New

- Select the type of list to create: Content, Image, File item, or Page.
  The Manage Data Libraries page appears with the tab for the appropriate content type active.
- Create the item as appropriate for that content type.
- Select **Administration → Lists.**
- Right-click on the list to which you want to add this item and select **View/Edit List**.
- Follow the steps in *Adding List Items* section to add items to the list.

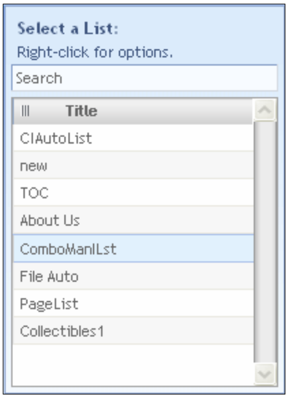
To: Save List	Reset
Click the “Save List” button.	Click the “Reset” button. A dialog appears,

Content Manager saves the list.	prompting you to confirm this action. Click the "OK" button. No items appear in the List Preview pane.

7.2 Viewing/Editing a List

To view or edit a list, follow these steps:

- Select **Administration → Lists** from the main navigation menu.
- To locate the list either enter a list name in the Search field or Scroll through the list



- Right-click the name of the list you want and select **View/Edit List.** Information about this list appears in the List Structure sections of the page.

  You can edit the following information about a list:

List Type	Editable Information
Automatic\Build Manually	List Title. Description.
Automatic	List Preview. Directory or menu item through which Content Manager populates items for list. • Click the link to select a new directory or menu item through which Content Manager

List Type	Editable Information
	populates items for this list.
Automatic	Display options.
Automatic	Filter options.
Build Manually	List Preview. • Add or remove list items from List Preview pane. To add item(s): • Right-click on an item in the List Preview pane and select Add List Item(s). Follow the steps in the *Adding List Items* section of this guide. To remove an item: • Right-click on an item in the List Preview pane and select Remove List Item(s). Content Manager deletes the item for the List Preview pane.

- Click **Update Preview** button to review your edits.
- Click the “Save List” button to finalize the list.

7.3 Deleting a List

To delete a list:

- Select the **Administration → Lists** option from the main navigation menu.
- To locate a list either enter a list name in the Search field or Scroll through the list
- Right-click the name of the list and select **Delete List.**
  A dialog appears prompting you to confirm that you want to delete this list:
- Click the “OK” button.

  The list no longer appears in the Select a List pane.

8 MANAGING FORMS, BLOGS AND COMMENTS

This chapter tells you how to add and format additional material for your site including

- Forms
- Blogs and Blog Comments
- Site Comments.

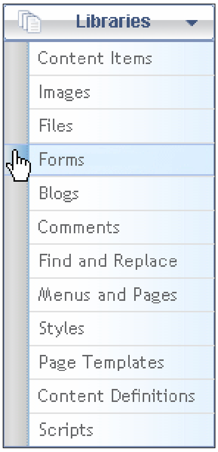
8.1 Managing Forms

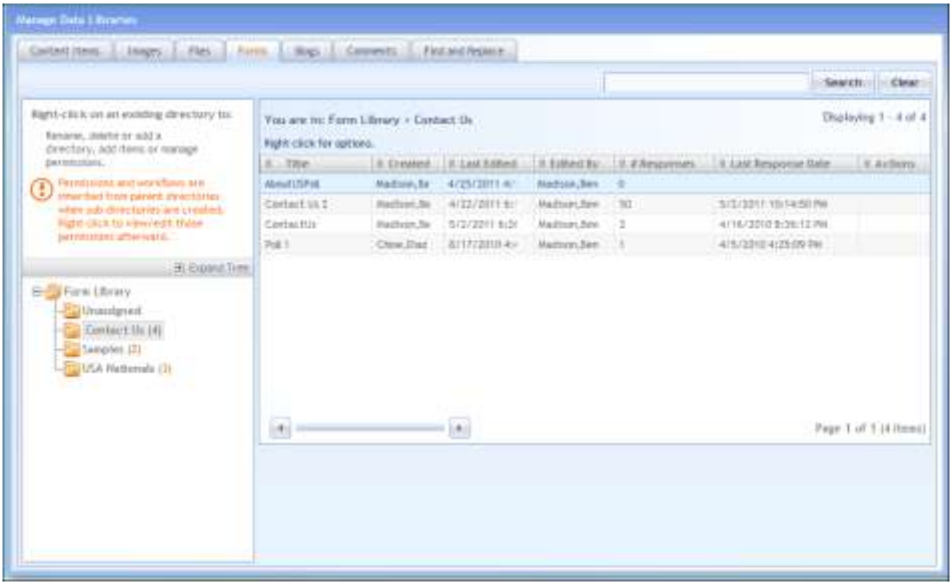
The Forms library allows you to design, store and manage web forms and one question polls.

To manage Forms, you perform the following tasks:

- Add form
- Add poll
- Edit properties
- Preview
- View results
- Delete form
- Download attachments

To manage the Forms Library, you first select **Libraries → Forms** from the main navigation menu at the top of Content Manager, or if already in the **Manage Data Libraries,** click the ***Forms*** tab.





The Forms tab displays the following:

- The Forms directory tree structure on the left
- A list of forms in the selected directory on the right

It displays the following information about each form in the selected directory:

Form Library Field	Description
Title	Name of form in Content Manager.
Created	Name of user who added form to library.
Last Edited	Date on which form was added or last edited.
Edited By	Name of user who last edited form.
# Responses	Number of users who completed form or poll.
Last Response Date	Last date on which a user completed a form or poll.

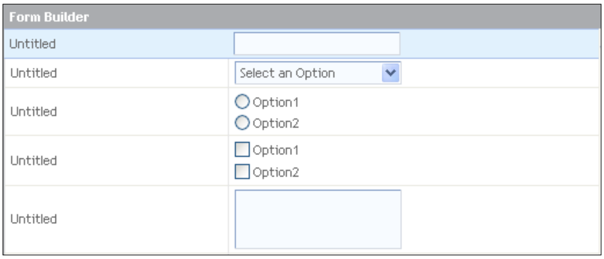
8.1.1 Adding a Form

Adding a Form requires the following major steps:

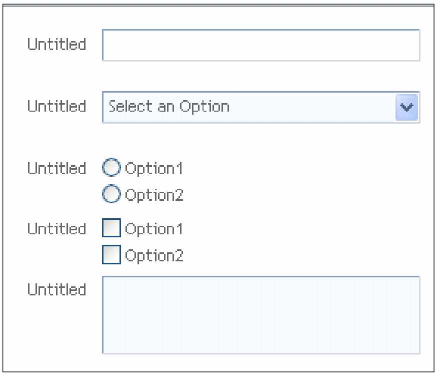
- Adding/Naming
- Designing layout
- Specifying properties
- Saving form
- Specifying form behaviors / Extra info

Content Manager provides you with a form builder that allows you to create a two column form similar to the following form edit view and preview.

Edit Form View



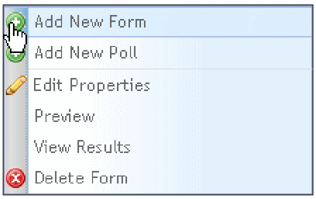
Form Preview



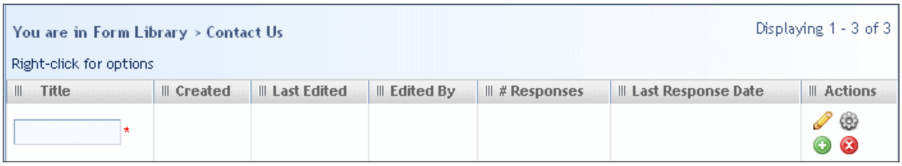
8.1.1.1 Adding/Naming a Form

To add / name a form, follow these steps:

- Select Libraries → Forms from the main navigation menu.
  The **Manage Display Libraries** container appears with the Forms tab active.
- Right-click the name of an existing form and select Add New Form.



A new record appears in the forms list with the Title field editable:



Enter a title for this form in the Title field.

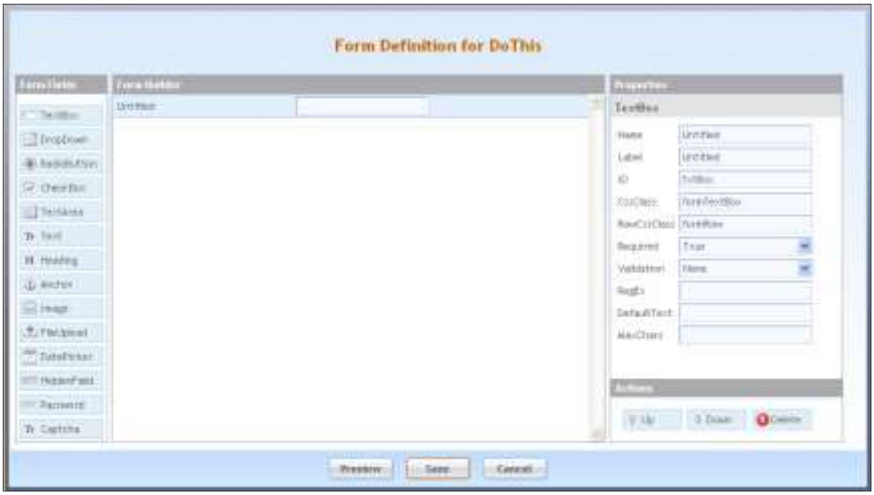
8.1.1.2 Designing Form Layout

To design the layout of a form, follow these steps:

- Click on a Form or the empty space in the forms library and select **Edit Form**, then .
  A Form Builder window appears displaying three columns:
  - Form Fields (left)
  - Form Builder (center)
  - Properties of selected form field (right)

To build a form, drag a form field from the Form Fields column into the Form Builder pane.

The selected form field appears in the Form Builder pane and Properties for that field appear in the Properties column.



The Form Builder provides the Form fields listed and described in the following table:

Form Field	Description
TextBox	A text field for user input.
DropDown	Drop down pick list.
RadioButton	Two option radio button list.
CheckBox	Two option check box list.
TextArea	A text box for user input.
Text	A text area to display information.
Heading	A heading area to display information.
Anchor	Anchor to make this form target of a link.
Image	Area to display image.
FileUpload	File selection field and browse functionality to upload a file.

Form Field	Description
DatePicker	Date selection field and calendar display functionality for user to input date.
HiddenField	Field that does not display to user, but allows you to add information for working with form in background.
Password	Field for user to enter password.
captcha	Adds challenge-response functionality between user and form.

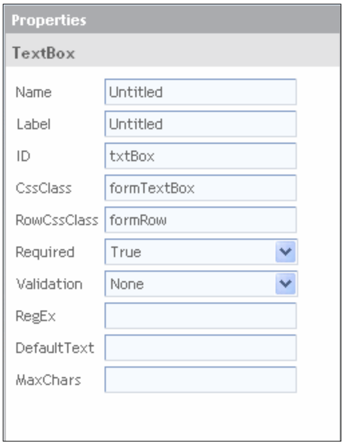
- Drag additional Form fields into the Form Builder pane.
- To move a field to a higher or lower horizontal position within the form builder pane, select a form field and click the **Up** or **Down** buttons.
- To remove a field from the form, select the field and click the Delete button. A dialog appears, prompting you to confirm that you want to delete field.
- Click the "OK" button.

  The selected field no longer appears in the Form Builder pane.

8.1.1.3 Specifying Form Field Properties

In addition to designing the layout of fields on a form, you also create the form design by creating label names for the fields and setting other properties of the field's behavior.

When you drag a field into the Form Builder pane, or click on a field already in the pane, properties for that field display in the Properties column.



To specify the properties of a form field, fill in these fields:

Form Field	Property	Description
All	Name	Enter a non-displaying name by which you can reference this field.
All Except: Text, Heading, Anchor, Image.	Label	Enter a label to appear beside this field that identifies the function of this field to the user.
All	ID	Enter a non-displaying ID by which you can reference this field.
All	CssClass	
All	RowCssClass	
All Except: Text, Heading, Anchor, Image, HiddenField,	Required	• Specifies whether a user is required to specify input in this field. • Click arrow in pick-list to choose true (default) or false. • True = required.

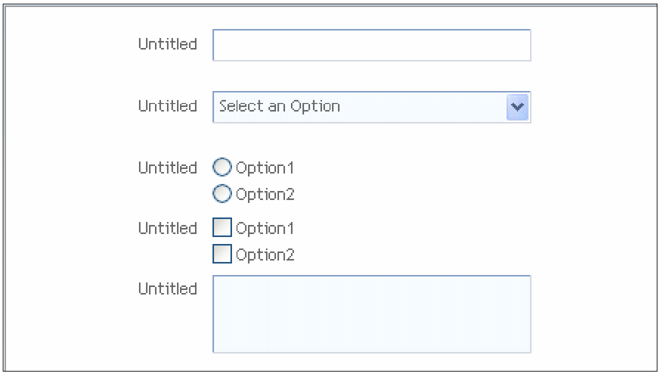
Form Field	Property	Description
captcha		• False = not required.
TextBox	Validation	• Specifies method by which field gets validated. • Click arrow in pick-list to select method. • Methods include: Alphabetic, Numeric, AlphaNumeric, Email, Zip, Phone
TextBox, Password	RegEx	Enter a regular expression to use for pattern matching.
TextBox, TextArea, DatePicker	DefaultText	Text to display in field when empty of user input.
TextBox	MaxChars	Maximum number of characters that a user can enter in this field.
DropDown, RadioButton, CheckBox	Items	Labels for options displayed in DropDown, RadioButton, or Checkbox.
DropDown	OnChange	Action to execute when OnChange event gets triggered.
Heading	Text	Text that displays in a bold font.
Anchor, Image	OnClick	Action to execute when OnClick event gets triggered.
Image	Src	Path and filename of physical image file.
	AltText	Text to display when Browser cannot display image.
FileUpload, DatePicker	IconPath	Specifies image file path for button displayed as part of this field type.

Form Field	Property	Description
DatePicker	Format	• Specifies required date format. • Click arrow in pick-list to select format. • Formats include: mm/dd/yy (default), dd/mm/yy, d MM yy, DD d MM yy.
	CustomFormat	Specifies a custom date format to use instead of the Format property options.
HiddenField	Value	Specifies default value for Hidden Field.
	Special	Specifies Hidden Fields • Click arrow in pick-list to select option. • Options include: None (default), PageUrl, PageTitle, Date, IP.

8.1.1.4 Previewing / Saving Forms

You can preview how a form actually appears to users.

- To preview the form, click the **Preview** button at the bottom of the Form Definition dialog.
  The form displays at it will appear to users:



- To save the form, click the “Save” button at the bottom of the Form Definition dialog.

  The Form Definition dialog closes and the Forms list appears.

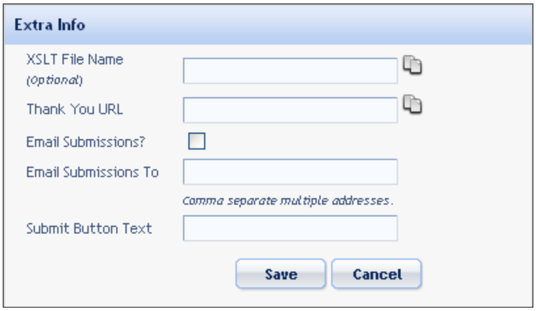
8.1.1.5 Specifying Form Behaviors / Extra Info

You can specify a number of form behaviors including:

- XSLT file
- Thank you URL
- Email submissions controls
- Submit button text

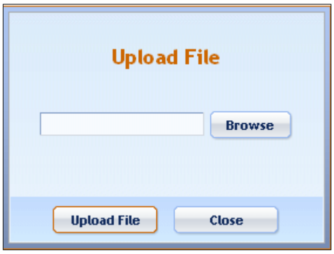
To specify additional form behaviors information, follow these steps:

- If form’s actions are not displayed, right-click and select Edit Properties
  The Form list appears with the selected form’s actions displayed.
- Click to bring up the Extra Info dialog.

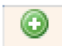


Specify Extra Info for this form as described in the following table:

Form Extra Info	Description
XSLT File name	• To add an XSLT file for this form, click . An Upload File dialog appears.

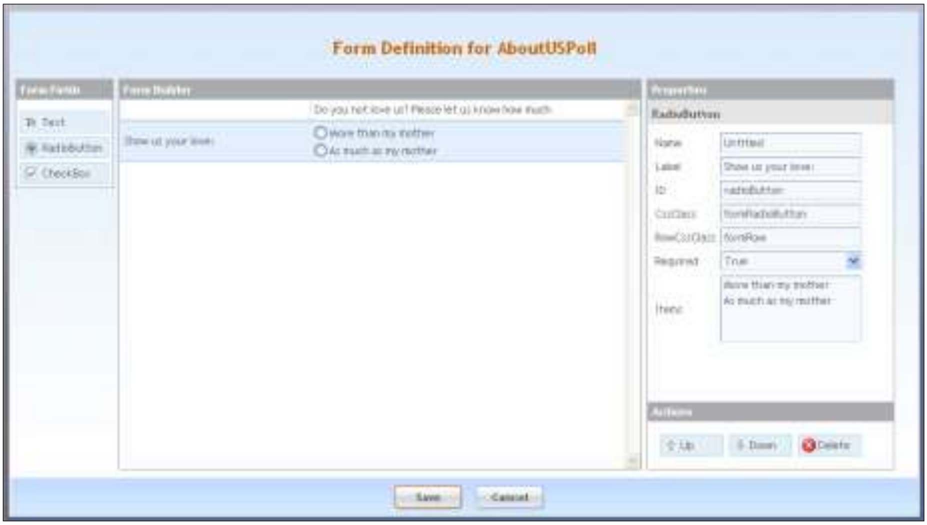
Form Extra Info	**Description**
	 • Click *Browse.* • Locate and select an XSLT file. • Click *Open.* The name of the selected file appears in the **Upload File** dialog. • Click *Upload File.* The name of the selected file appears in the *XSLT File Name* field.
Thank You URL	Specifies the URL or page to direct the user to after completing a form.
Email Submissions	Click the checkbox.
Email Submissions To	Specify email address(es) to which submissions will be emailed, if desired. Separate multiple addresses with commas.
Submit Button Text	Specify text to display on button that users click to submit form.

Click the “Save” button to store form Extra Info.

Click  under Actions to save this form.

8.1.2 Adding a Poll

Content Manager provides you with a form builder that allows you to create a single question poll similar to the following poll edit view:



Adding a Poll requires the following major steps:

- Adding/Naming
- Designing layout
- Specifying properties
- Saving form
- Specifying form behaviors / Extra info

8.1.2.1 Adding/Naming a Poll

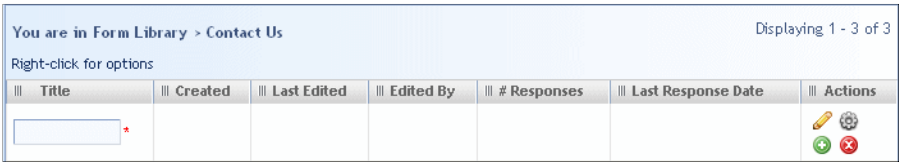
To add / name a poll, follow these steps:

- Select Libraries → Forms from the main navigation menu.

  The **Manage Display Libraries** container appears with the Forms tab active.

- Right-click the name of an existing form and select Add New Poll.

A new record appears in the forms list with the Title field editable:



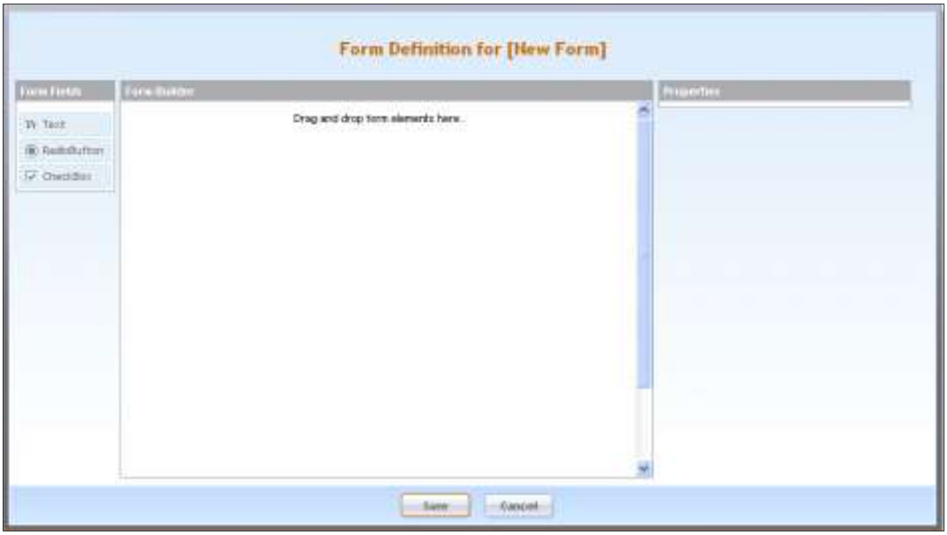
- Enter a title for this poll in the Title field.

8.1.2.2 Designing a Poll Layout

To design the layout of a poll, follow these steps:

Click . To bring up the Form Builder window which displays three columns:

- Form Fields (left)
- Form Builder (center)
- Properties of selected form field (right)

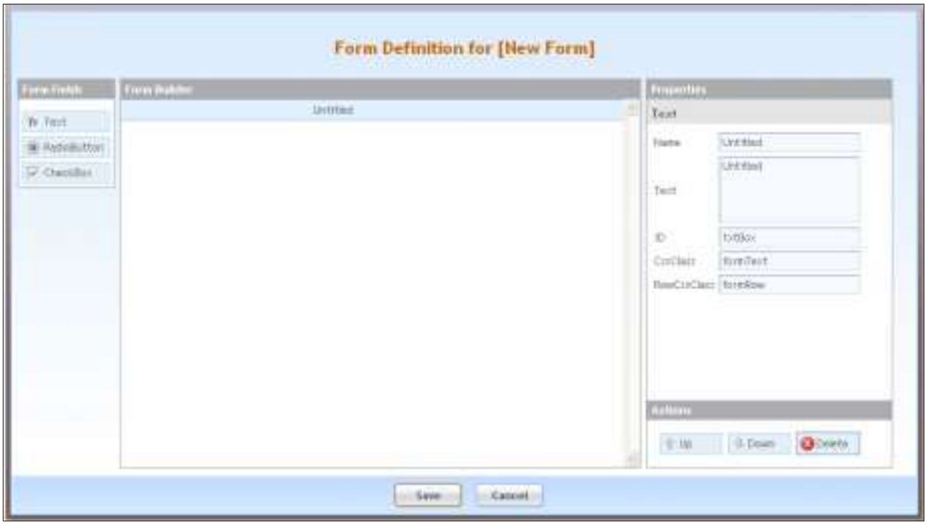


Drag a text field from the Form Fields column into the Form Builder pane.

Drag either a RadioButton or Checkbox control into the Form Builder pane.

> As you can include only one question in a poll, you can drag only one Text Field and one control field into the Form Builder pane to design a poll.

The selected form fields appear in the Form Builder pane and Properties for that field appear in the Properties column.



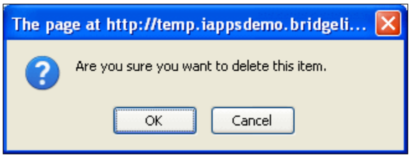
The Form Builder provides the Form fields for a poll listed and described in the following table:

Form Field	Description
Text	A text field to display the text of a question.
RadioButton	Two option radio button list to display answer choices.
CheckBox	Two option check box list to display answer choices.

- To move a field to a higher or lower horizontal position within the form builder pane, select a form field and click the **Up** or **Down** buttons.
- To remove a field from the form, select the field and click the **Delete** button.

ⓘ Form Builder does not allow you to add a text field after a control field. If you delete a text field, you cannot add a new one.

- A dialog appears, prompting you to confirm that you want to delete field.



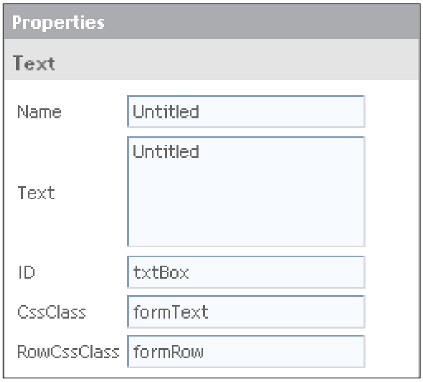
- Click the “OK” Button.

  The selected field no longer appears in the Form Builder pane.

8.1.2.3 Specifying Poll Field Properties

In addition to designing the layout of fields on a poll, you also create the form design by creating label names for the fields and setting other properties of the field’s behavior.

When you drag a field into the Form Builder pane, or click on a field already in the pane, properties for that field display in the Properties column.



Poll Fields have the following properties.

Poll Fields	Property	Description
All	Name	Enter a non-displaying name by which you can reference this field.
RadioButton, CheckBox	Label	Enter a label that introduces the poll answers available to the user.
All	ID	Enter a non-displaying ID by which you can reference this field.
All	CssClass	

Poll Fields	Property	Description
All	RowCssClass	
RadioButton, CheckBox	Required	Specifies whether a user is required to specify input in this field. Click arrow in pick-list to choose true (default) or false. True = required. False = not required.
RadioButton, CheckBox	Items	Labels for options displayed in RadioButton or Checkbox.

- To save the poll, click the “Save” button at the bottom of the Form Definition dialog.

  The Form Definition dialog closes and the Forms list appears.

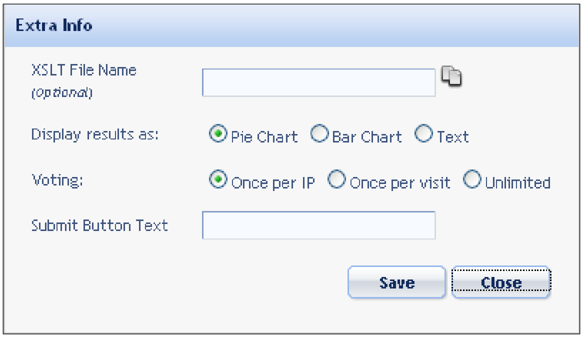
8.1.2.4 Specifying Poll Behaviors / Extra Info

You can specify a number of poll behaviors including:

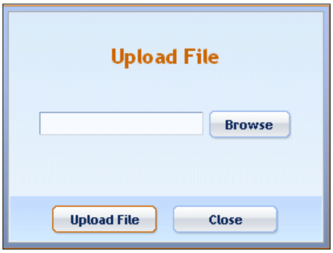
- XSLT file
- Format in which to display results
- User voting controls
- Submit button text

To specify additional form behaviors information, follow these steps:

- If poll’s actions are not displayed, right-click and select **Edit Properties.** If The Form list appears with the selected poll’s actions displayed.
- Click . An Extra Info dialog appears.



Specify Extra Info for this poll as described in the following table:

Poll Extra Info	Description
XSLT File name	• To add a XSLT file for this form, click . An **Upload File** dialog appears.  • Click *Browse.* • Locate and select a XSLT file. • Click *Open* The name of the selected file appears in the Upload File dialog. • Click *Upload File.* The name of the selected file appears in the *XSLT File Name* field.
Display Results As	Choose whether to display as • Click Pie Chart radio button • Click Bar Chart radio button • Click Text radio button
Voting	Choose voting rules. • Click Once per IP radio button • Click Once per visit radio button • Click Unlimited radio button
Submit Button Text	Specify text to appear on button that user clicks to submit form or poll.

Click the “Save” button to store form properties.

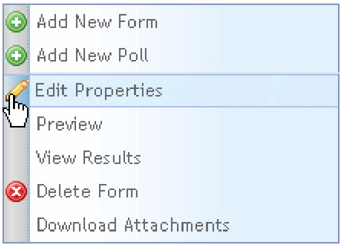
Click under Actions to save this form.

8.1.3 Editing Form/Poll Properties

To edit the properties of a form or poll, follow these steps:

- Select **Libraries → Forms** from the main navigation menu.

  The **Manage Display Libraries** container appears with the Forms tab active.
- Right-click the name of an existing form / poll and select Edit Properties.



The Title field of the selected form / poll becomes editable:

- Either:

Click	Click
To edit form design or form field properties and make the Form Definition dialog box appear. See *Adding a Form* or *Adding a Poll* section for information.	To edit extra info for the form / poll and make the Extra Info dialog appear. See *Adding a Form* or *Adding a Poll* section for information on Extra Info.

- Click under Actions to save changes.

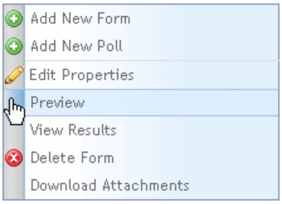
8.1.4 Previewing a Form / Poll

To preview the exact appearance of a form or poll, follow these steps:

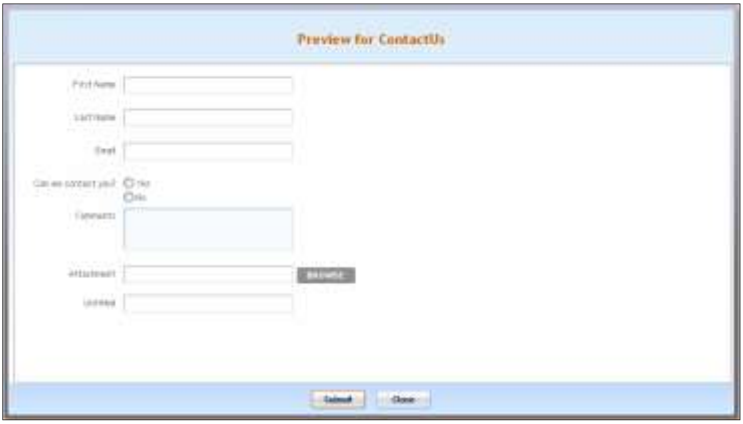
- Select **Libraries → Forms** from the main navigation menu.

  The **Manage Display Libraries** container appears with the Forms tab active.

- Right-click the name of an existing form / poll and select **Preview.**



Content Manager displays the exact appearance of the form / poll in a window:



- Optionally, complete a form and click the **Submit** button.

  Content Manager stores your response to the form and closes the preview.

- Click the **Close** button when finish previewing a poll or a form for which you did not submit a response.

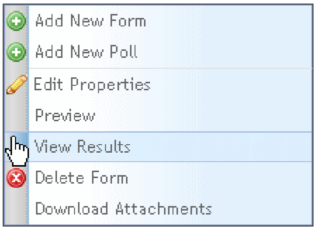
8.1.5 Viewing Form / Poll Results

To view the results of a form or poll, follow these steps:

- Select **Libraries → Forms** from the main navigation menu.

  The **Manage Display Libraries** container appears with the Forms tab active.

- Right-click the name of an existing form / poll and select View Results.



A **View Results** dialog appears:

Select what results to view:

Dates the form was completed

- ○ - Click the All Dates checkbox to view results from all dates.

Or

- ○ - Unclick the All Dates checkbox and select a date range by specifying a Start and End Date for the range of dates to view results.

Fields

- ○ - Click the Show All checkbox to view results from all fields.

Or

- ○ - Unclick the Show All checkbox and click the check box beside each field for which you want to view results.

- Click the “View Results” button at the bottom of the dialog.

A *Results* dialog appears:

From the Results dialog, you can

○ Export results to a file in any of the following formats: Excel, CSV, Text. ▪ -Click on the appropriate format ▪ A Save file dialog appears. ▪ Click OK. ▪ Select the location in which to save file, enter a filename and click Save.	○ Click the checkbox to the left of a response and click the **Delete** button. ▪ The selected response record no long appears in the Results dialog

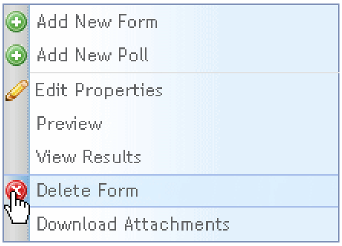
- Click the **Close** button when you finish viewing and managing results.

  The Results dialog closes and the forms list appears.

8.1.6 Deleting a Form / Poll

To delete a form or poll, follow these steps:

- Select **Libraries → Forms** from the main navigation menu.
  The **Manage Display Libraries** container appears with the Forms tab active.
- Right-click the name of an existing form / poll and select **Delete Form**.



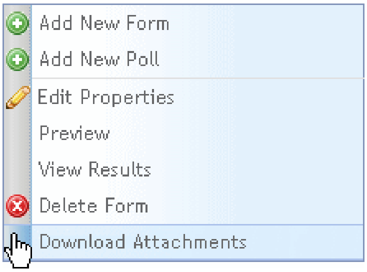
  A dialog box appears, prompting you to confirm that you want to delete the form:

- Click the “OK” button. Content Manager deletes the form and displays a success dialog.

8.1.7 Downloading Attachments

To download attachments from a form that required users to include an attachment, follow these steps:

- Select **Libraries → Forms** from the main navigation menu.
  The **Manage Display Libraries** container appears with the Forms tab active.
- Right-click the name of an existing form and select Download Attachments.



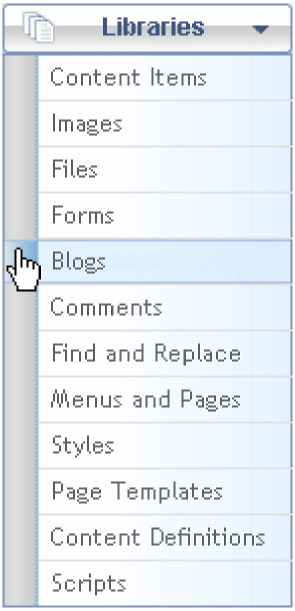
- A download attachments dialog appears. Click “OK”.

8.2 Managing Blogs

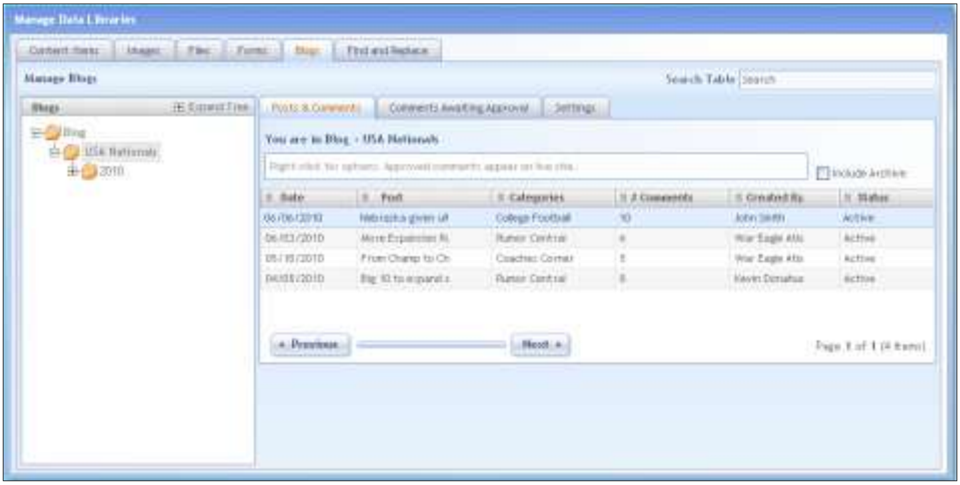
The Blogs library allows you to design, store and manage web blogs and blog activity. To manage the Blogs Library, you can perform the following tasks:

- Blogs
    - Add blog
    - Rename blog
    - Delete blog
    - Jump to blog in **Site Editor**
- Posts
    - Add new post
    - Edit post
    - Make post sticky
    - Delete post
    - Assign index terms
    - View post comments
    - Jump to post in **Site Editor**
- Comments
    - Approve
    - Delete

To manage the Blogs Library, you first select **Libraries → Blogs** from the main navigation menu at the top of Content Manager, or, if you are already in the **Manage Data Libraries** container, click the ***Blogs*** tab.



Manage Data Libraries appears with the Blogs tab active:



The Blogs tab displays the following:

- The Blogs directory tree structure on the left
- Post and Comments tab, displaying a list of posts in the selected directory and number of comments, if any, associated with that post

- Comments Awaiting Approval tab, displaying comments to posts
- Settings tab where you can set options for how a blog operates
- The Blogs library displays the following information about each post listed on the Posts & Comments tab:

Blog Library Posts & Comments Field	**Description**
Date	Date on which form was posted or last edited.
Post	Displays a portion of the title (subject) of the post. Place cursor over this field to see full title of post.
Categories	Lists index terms specified for this post. Place cursor over this field to see complete list index terms assigned to this post.
# Comments	Lists total number of comments for the post.
Created By	Name of user who added post.
Status	Active or Archived. • Active posts appear on the Blog. • Archived posts remain in Content Manager, but do not appear on the Blog.

The Blogs library displays the following information about each post listed on the ***Comments Awaiting Approval*** tab:

Blog Library Comments Awaiting Approval Field	**Description**
Post Name	Title of post to which comment was added.
Post Date	Date on which post was added to blog.
Comment Details / Actions	Specifies information about comment including: name of user who added comment, date comment was added, and title of comment. Provides links by which a blog administrator can manage comments including: approving, deleting, editing, or replying to user who entered comment.

From the Blogs Library you can perform the following actions with Blogs:

Blogs Library Section	Right-Click Context Menu Option
Blogs directory tree root	Add a Blog
Blogs sub-directory	Rename Blog
	Delete Blog
	Jump to Blog in Site Editor
Posts & Comments	Add New Post
	Edit Post
	Make Post Sticky
	Archive Post
	Delete Post
	Assign Index Terms
	View Post Comments
	Jump to Post in Site Editor
Comments Awaiting Approval Tab	Approve or delete comments
Settings Tab	Specify blog display and comment settings and the menu to which to connect the blog

8.2.1 Adding a Blog

To add a new blog,:

- Right-click on the Blog root directory and select **Add Blog.** A new sub-directory node appears under Blogs
- Enter a name for the Blog.
  The new Blog name appears in the Blogs Library directory tree.

See the following section to specify settings for the blog.

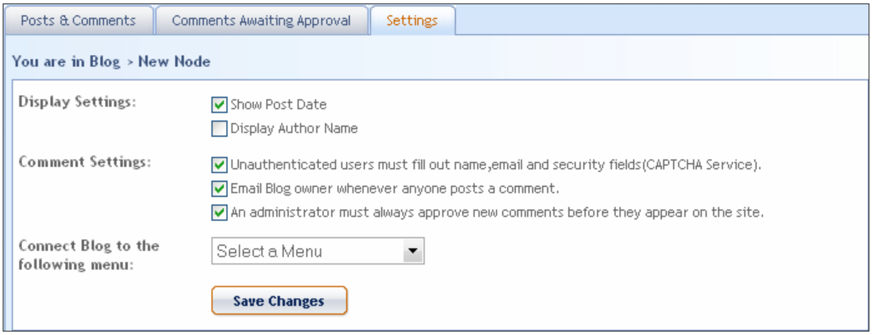
8.2.2 Specifying Blog Settings

At anytime after creating a blog, you can specify settings for it.

To specify Blog settings, follow these steps:

- Click the ***Settings*** tab.

The Settings appear:

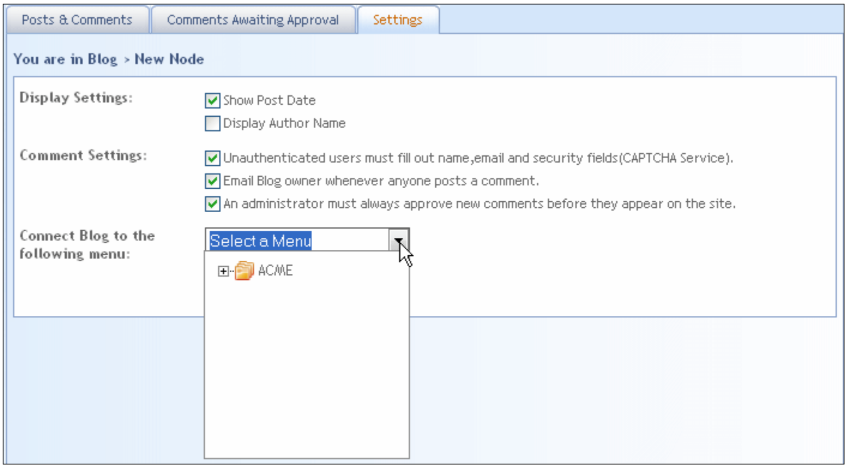


- Specify Blogs Display and Comment setting as specified in the following table:

Blog Settings	**Options**
Display Settings controls how Content Manger handles comments entered on a Blog page.	Show Post Date - Click this check box to display on blog the date on which each post was entered. Display Author Name - Click this check box to display on blog the name of the author who enters each post.
Comment Settings controls how Content Manger handles comments entered on a Blog page.	Unauthenticated users must fill out name, email and security fields(CAPTCHA Service). • Click this check box to require authentication of users. Email Blog owner whenever anyone posts a comment • Click this checkbox to email Blog owner whenever someone posts a comment. An administrator must always approve new comments before they appear on the site • Click this checkbox to require an administrator to approve or delete comments before displaying on the blog.

To connect this blog to a menu item

- Click the arrow in the Select a Menu pick-list beside *Connect Blog to the following menu.* A menu tree appears:



- Click **+** beside the menu root to expand the menu list.
- Click on a menu item to select it.

  The Menu Item appears in the *Connect Blog to the following menu* pick-list. The Blog appears under the selected menu item on the site.

- When you finish specifying settings for this blog, click the “Save Changes” button. A settings successfully changed dialog appears.

8.2.3 Renaming a Blog

To rename a blog, follow these steps:

- Right click on a blog name in the blogs directory tree and select **Rename Blog**.

- The blog name becomes editable.
- Enter a new name for the blog and press Enter.

The new blog name appears in the directory tree.

8.2.4 Deleting a Blog

To delete a blog, follow these steps:

- Right click on a blog name in the blogs directory tree and select **Delete Blog**.

- Content Manager displays a dialog prompting you to confirm you want to delete this blog:
- Click the “OK” button to delete the blog.

  Content Manager deletes the blog and all posts associated with it. The blog sub-directory no longer appears in the Blog library directory tree.

8.2.5 Jumping to Blog in Site Editor

You can jump from the Blogs library to the **Site Editor** to view how a blog appears in the Site.

To jump to blog in **Site Editor**, follow these steps:

- Right-click on a blog in the blog library directory tree and select Jump to blog in **Site Editor**.

The **Site Editor** opens, displaying the selected blog:

To return to Blogs library, select **IAPPS → Content Manager Last Admin page**.

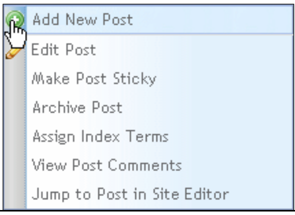
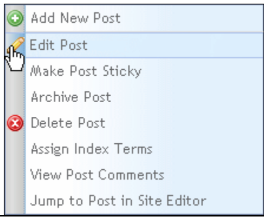
8.2.6 Adding / Editing a Post

You can add a post to a blog or edit posts from the Blogs library.

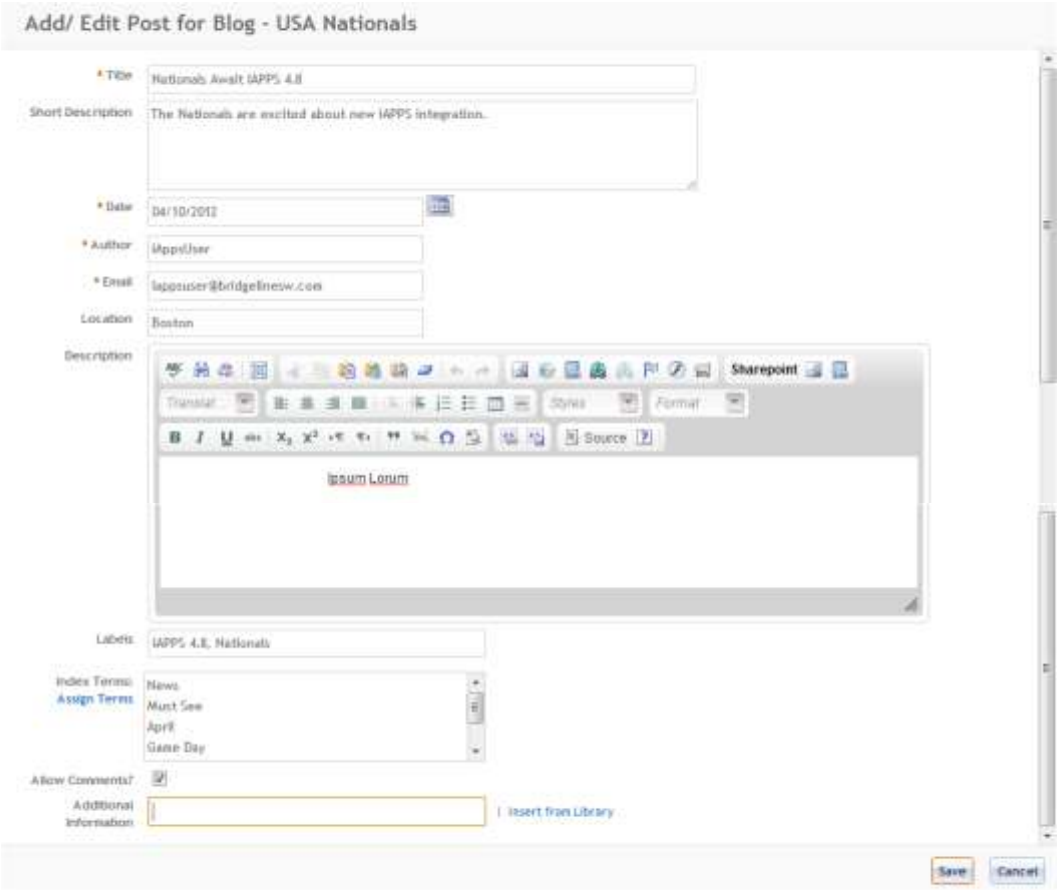
Blog comments display submitter name as a link to the email address of the poster.

To add / edit a post to a blog from the Blogs library, follow these steps:

- Click the name of the blog in the directory tree to which you want to add / edit a post.
- To

<table>
<tr>
<td>Add Post – Right Right-click in the posts list and select Add New Post.

</td>
<td>Edit Post -- Right-click on the post in the posts list to edit and select Edit Post.

</td>
</tr>
</table>

The blog post editor appears:



Enter blog post properties as described in the following table:

Blog Post Property	Description
Title	Title of post to appear on Blog.
Short Description	Short description of post to appear in Blog post list.
Date	Date on which post added. Content Manager selects current date by default. Click the calendar icon to add post with a different date.

Blog Post Property	**Description**
Author	Name of user who added post. Content Manager indicated logged-in user as author by default.
Email	Email address of user who authors post
Location	Specifies the location of the author of the post, for example as in a news items byline.
Labels	Specify tags to place on content to organize blog postings by categories. These labels are not exposed by default, but are used for custom coding or searching. Your developer can tell you more about them.
Index Terms: Assign Terms	Index terms assigned to this post to display in the Categories column in the posts lists. • Click the Assign Terms link to specify index terms for this post. • The Assign Index Terms dialog appears. • Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder. • Click the **Save Index Terms** button.
Allow Comments?	Click this checkbox for iAPPS to allow users to add comments to this post.
Additional Information	This allows for the creation of custom Blog Post property fields. For example, along with Location or Author name, you might want to include an author photo. To add an additional field, a developer must create a content definition for it. Users can then add content to the field by clicking the Insert from Library link although the content will not appear on the front-end until a developer modifies the XSLT to account for the addition.

Create or edit the contents of the post message in the Description text box.

Edit Post View	**Description**
Design	Allows you to create / edit message using WYSIWYG editor.
HTML	Allows you to create / edit message using HTML markup.
Preview	Displays message as it appears on blog.
Source	If your company is using the CKEditor toobar, you will not get the above options. To edit the HTML, instead click the “Source” button on the toolbar.

- Click the “Save” button. A post saved successfully dialog appears.
- Click the “OK” button.

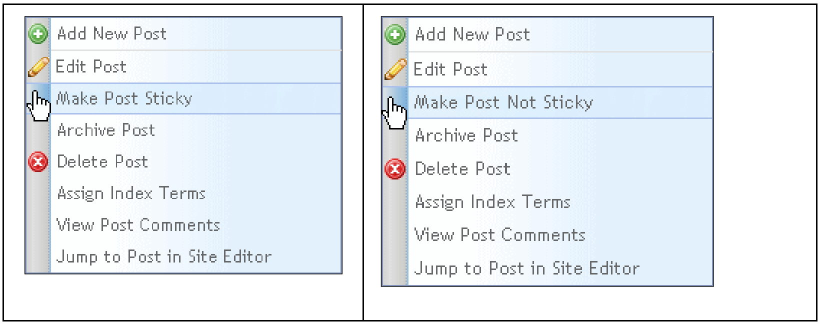
  Content Manager:
  - Displays a summary of the new post in the post list
  - Stores the post in a directory under that blog for the month in which the post was added.

8.2.7 Making a Post Sticky / Not Sticky

Typically, blogs displays posts in descending order from newest post to oldest. You can select a post to be always displayed at the top of a blog by making it sticky. You can later remove the sticky designation from a post so that it then appears in the typical order on the blog.

To make a post sticky / not sticky:

Make Sticky	Make Not Sticky
Right-click on a post that is not sticky and select Make Post Sticky.	Right-click on a post with a status of sticky and select Make Post Not Sticky.



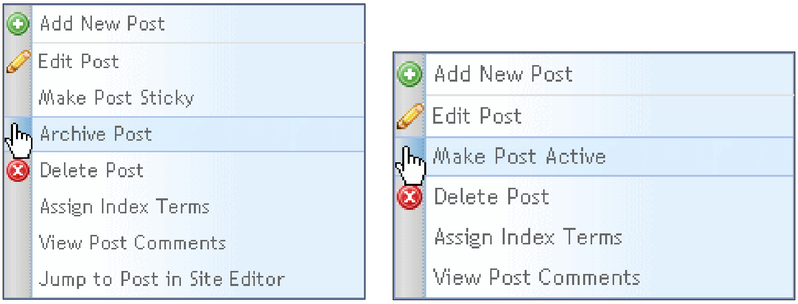
Content Manager makes the post sticky or not-sticky.

8.2.8 Archiving / Making Active a Post

Content Manager does not delete archived posts; it removes the post from display on the Blog.

ⓘ To view archived posts in the list, click the *Include Archive* check box at the top of the posts list.

To archive a post or make a post active, right-click on a post in the list and select **Archive Post** or **Make Post Active** as appropriate.



Content Manager changes the status it displays for the post in the Blogs library list and either:

- Stops displaying an archived post on the blog
- Displays an activated post on the blog.

8.2.9 Deleting a Post

You can delete a post from a blog.

To delete a post:

- Right-click on a post in the post list on ***the Posts & Comments*** tab and select **Delete Post.**
- A dialog appears prompting you to confirm that you want to delete this post:
- Click the “OK” button.
- Content Manager removes this post from the blog and the Blog Library.

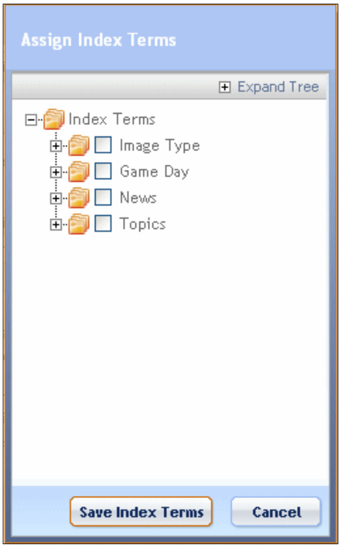
8.2.10 Assigning Index Terms to a Post

You can assign index terms to a post that Content Manager displays in the Categories column in the posts lists.

To assign index terms to a post:

- Right-click on a post in the post list on ***Posts & Comments*** tab and select **Assign Index Terms.**

  The Assign Index Terms dialog appears:



- Click the check box beside the Index Term folder or individual index term to add to this post. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
- Click the “Save Index Terms” button.

The index terms appear in the *Categories* column of the post list.

8.2.11 Viewing / Approving / Deleting Post Comments

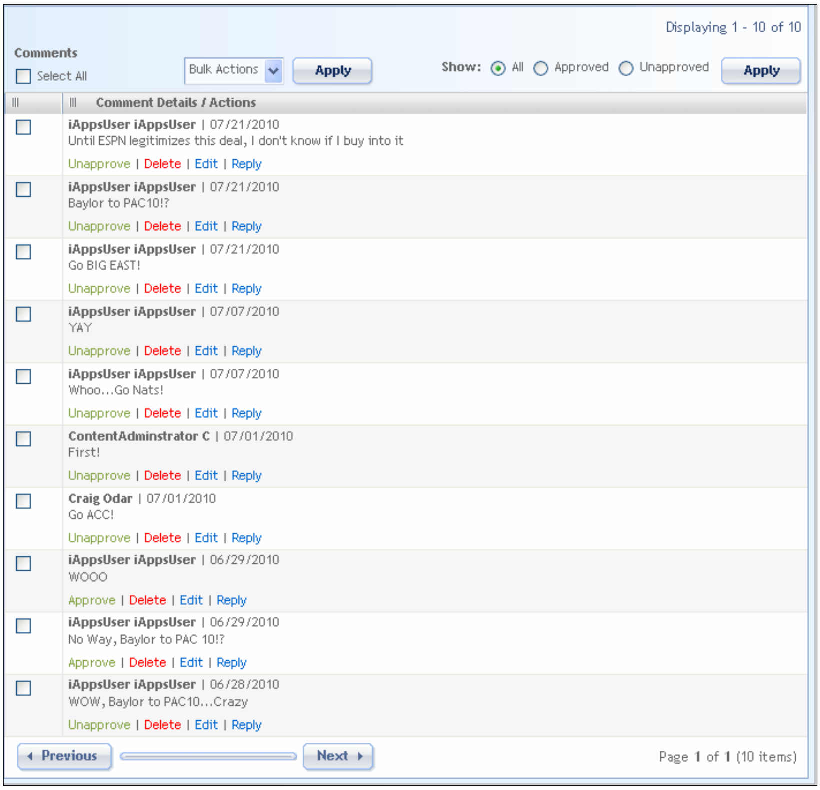
You can manage comments from the following areas of the Blogs Library:

Blogs Library Tab	Manage Comments Options
Posts & Comments	To view, approve/unapprove delete, edit or reply, right-click on a post in the post list on the Posts & Comments tab and select View Post Comments. See *Viewing / Approving / Deleting Post Comments* section of this guide for more details.
Comments Awaiting Approval	To view, approve/unapprove delete, edit or reply comments, click the Comments Awaiting Approval tab.

To view comments associated with a post

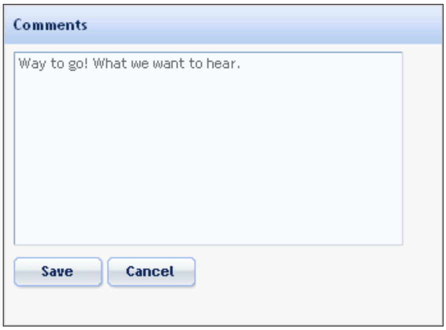
- Right-click on a post in the post list on ***Posts & Comments*** tab and select **View Post Comments.**

  A list of comments associated with this post appears:



You can view, approve, or delete post comments from the Posts & Comments tab as described in the following table:

Comment Actions	Description
Viewing	You can view: All, Approved, or Unapproved comments in the list. - To select which comments to view, click the appropriate radio button beside *Show* and then click the **Apply** button.
Selecting	To select comments to approve or delete either: - To select all comments, click the checkbox beside *Select All* to select all comments. A checkmark appears in the checkbox beside each comment in the list. - To select individual comments, click the checkbox beside each comment to select.
Bulk Approving / Deleting	After selecting two or more comments to take action on, click the arrow in the *Bulk Actions* list and select Approve or

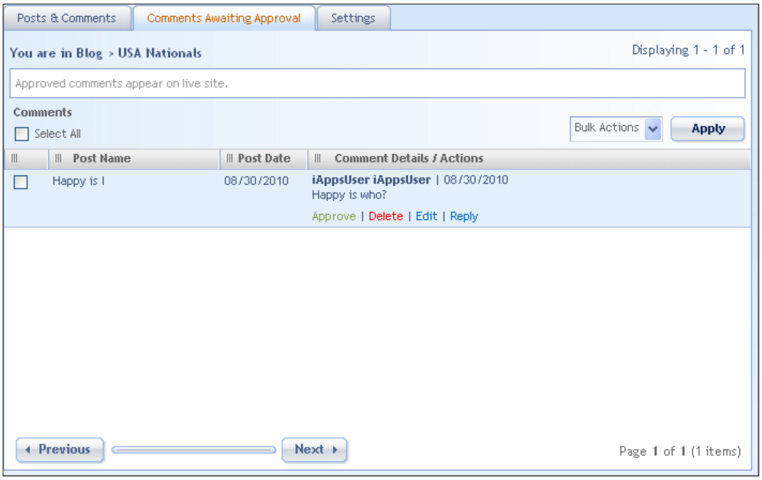
<table>
<tr><th>Comment Actions</th><th>Description</th></tr>
<tr><td></td><td>Delete.
To Approve comments:
- Click Bulk Actions > Approve.
- Click the Apply button.
An approved comments confirmation dialog appears.
- Click the OK Button.
Approved comments now appear on the blog.
To Delete comments:
- Click Bulk Actions > Delete.
- Click the Apply button.
A deleted confirmation dialog appears.
- Click the OK Button.
Deleted comments no longer appear on the blog or in the Blog Library.
Note: You can also delete a single comment by clicking the Delete link under it.</td></tr>
<tr><td>Single Comment Approving / Deleting</td><td>- Click the Approve or Delete link directly under the comment.
Content Manager performs the selected action as described for Bulk Approving / Deleting.</td></tr>
<tr><td>Unapproving</td><td>To unapprove a comment:
- Click the Unapprove link under it.
An unapproved confirmation dialog appears.
- Click the OK Button.
An Approve link appears under the comment in the list.</td></tr>
<tr><td>Editing</td><td>To edit a comment:
-Click the Edit link that appears under it.
A comments dialog appears.


- Edit the comment and click the Save button.
A comment updated confirmation dialog appears.</td></tr>
</table>

Comment Actions	Description
	-Click the *OK* Button.
Replying	To reply to a comment: - Click the Reply link under a comment. A blank comments dialog appears. - Enter a comment and click the *Save* button. A comment replied and approved confirmation dialog appears. -Click the *OK* Button.

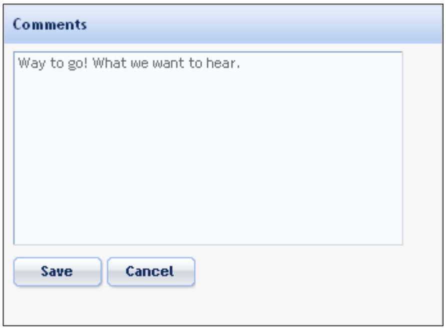
To close a comments list, click on another post in the post list.

8.2.12 Managing Blog Comments Awaiting Approval



From the ***Comments Awaiting Approval*** tab you can work with posts comments as described in the following table:

Comment Actions	Description
Selecting	To select comments to approve or delete either: - To select all comments, click the checkbox beside *Select All* to select all comments. A checkmark appears in the checkbox beside each comment in the list. - To select individual comments, click the checkbox beside each comment to select.
Bulk Approving / Deleting	After selecting two or more comments to take action on, click the arrow in the *Bulk Actions* list and select Approve or Delete.

Comment Actions	Description
	To Approve comments in bulk: - Click Bulk Actions → Approve. - Click the **Apply** button. An approved comments confirmation dialog appears. - Click the "OK" Button. Approved comments now appear on the blog. To Delete comments in bulk: - Click Bulk Actions → Delete. - Click the **Apply** button. A deleted confirmation dialog appears. - Click the "OK" Button. Deleted comments no longer appear on the blog nor in the Blog Library. **Note**: You can also delete a single comment by clicking the *Delete* link under it.
Single Comment Approving / Deleting	- Click the Approve or Delete link directly under the comment. Content Manager performs the selected action as described for Bulk Approving / Deleting.
Unapproving	To unapprove a comment: - Click the *Unapprove* link under it. An unapproved confirmation dialog appears. - Click the "OK" Button. An Approve link appears under the comment in the list.
Editing	To edit a comment: -Click the Edit link that appears under it. A comments dialog appears.  - Edit the comment and click the "Save" button. A comment updated confirmation dialog appears. -Click the "OK" Button.

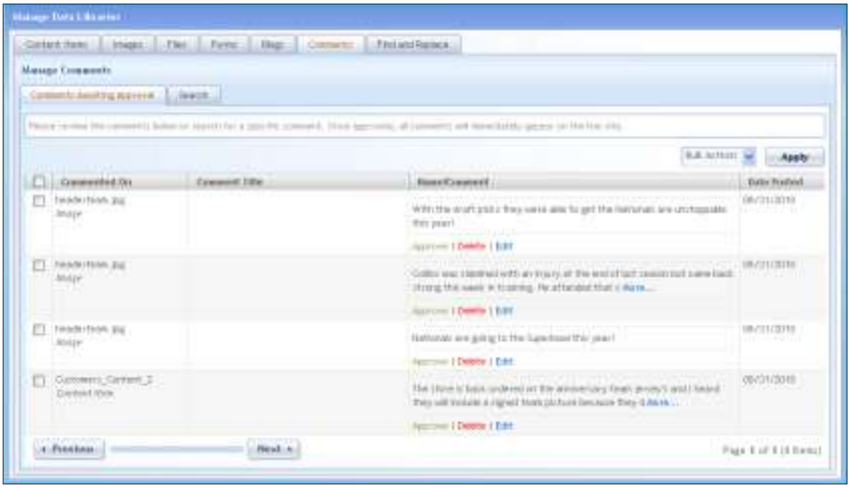
Comment Actions	Description
Replying	To reply to a comment: - Click the Reply link under a comment. A blank comments dialog appears. - Enter a comment and click the “Save” button. A comment replied and approved confirmation dialog appears. -Click the “OK” Button.

8.3 Managing Comments

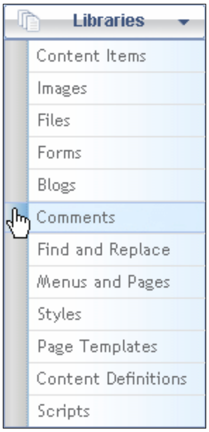
You can set any page in your website to allow comments.

In addition, you can also set a parameter that requires comments to receive an administrative approval before they display on the page.

If comments are allowed on a page and set to require approval, when users enter comments, the comments appear in the Comments Awaiting Approval tab on the Manage Comments page.



To access the Manage Comments page, select **Libraries → Comments.**



The ***Comments Awaiting Approval*** tab displays the following:

Field	Description
Commented On	Specifies content area of page on which user made comment.
Comment Title	Displays user entered title of comment when comment form on page contains a title field.
Name/Comment	Displays actual text of user comment and action links by which you can approve, delete, or edit this comment.
Date Posted	Displays the date on which the comment was posted on the page.

From the Manage Comments page you can:

- Approve, delete or edit a single comment
- Approve or delete a group of comments
- Search comments

8.3.1 Approving / Deleting Comments

To approve or delete comments, follow these steps:

- Select **Libraries → Comments**.
  The Manage Comments page appears with the ***Comments Awaiting Approval*** tab active.
- Locate the comment to act on in the list.

- Click the check boxes beside each comment you want to approve or delete. To select all comments in the list, click the check box in the column heading (to the left of the Commented On column).
- Click the arrow in the Bulk Actions pick-list and select either Approve or Delete. A confirmation dialog box appears.
- Click OK.
  Approved messages now appear on the website in the location where users entered the comments. Deleted comments no longer appear in Content Manager or on the website.

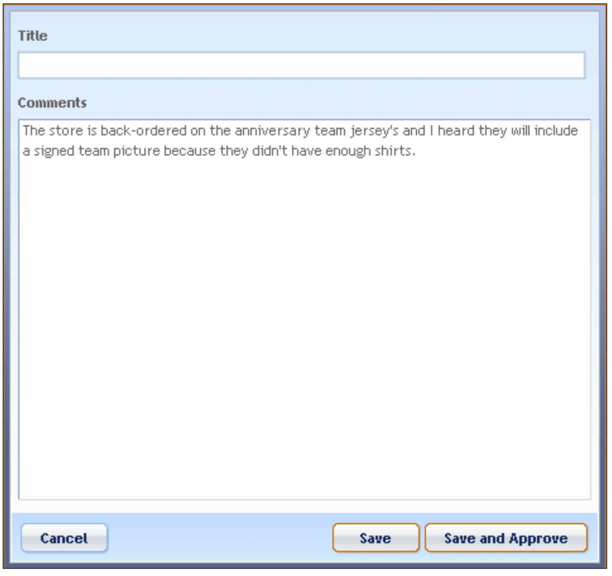
8.3.2 Editing a Comment

You can edit a comment before approving it.

To edit a comment, follow these steps:

- Select **Libraries → Comments**.
  The Manage Comments page appears with the Comments Awaiting Approval tab active.
- Locate the comment to act on in the list.
- Click Edit in the Name/Comment column.

  Content Manager displays the comment in a dialog.



Edit the comment or add additional text.

When you finish editing, either:

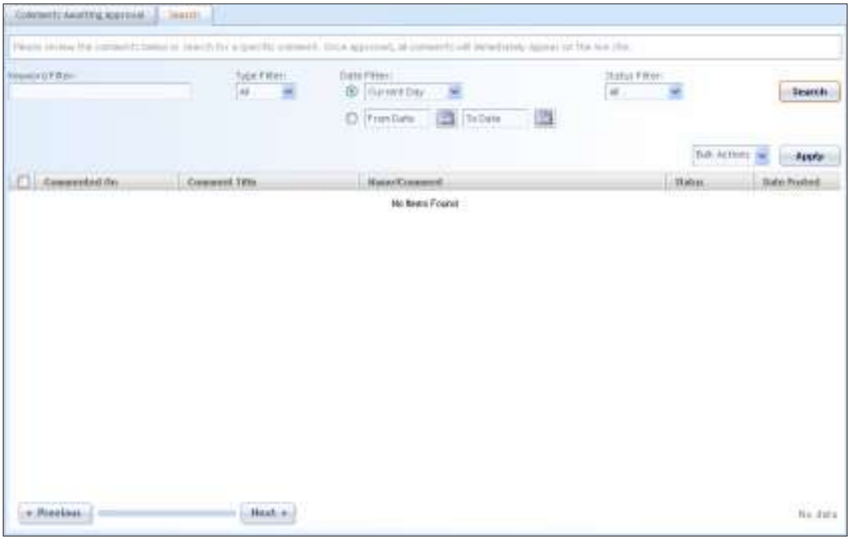
To Save Edits	To Save Edits and Approve
Click the “Save” button. The edited comment appears in the Comments Awaiting Approval list.	Click the “Save and Approve” button. The edited comment now appears on the website in the location where the user added it.

8.3.3 Searching Comments

You can search the Comments Awaiting Approval list for specific comments based on various filter criteria.

To search the Comments Awaiting Approval list, follow these steps:

- Select **Libraries → Comments.**
  The **Manage Comments** container appears.
- Click the ***Search*** tab.



Specify any of the following search criteria:

Comments Search Filter	Description
Keyword filter	Specify a keyword to locate comments containing this keyword.
Type Filter	To search for comments matching a comment type (content, page image file), click the arrow in the Type Filter pick-list to select a comment type.
Date Filter	Allows you to search for comments within a general time frame, or a specific range. • To search for comments created within a general time frame, click the radio button beside Current Day, then click the arrow in the pick list to select the time frame. • To search for comments created with a specific time range, click the radio button beside From Date, then click the date picker icons to specify the From- and to dates of the range.
Status filter	To search for comments matching a status (Approved, Unapproved), click the arrow in the Status Filter pick-list to select a status.

- Click the **Search** button.
  A list of comments matching the specified search filters appears.
- Optionally, to act on the listed comments in bulk:
  Either:
  - Click the check boxes beside each comment you want to approve/unapprove or delete
  - Click the check box in the column heading (to the left of the Commented On column) to select all comments in the list
- Then click the arrow in the Bulk Actions pick-list and select either **Approve/Unapprove** or **Delete.**

9 MANAGING RSS CHANNELS AND FEEDS

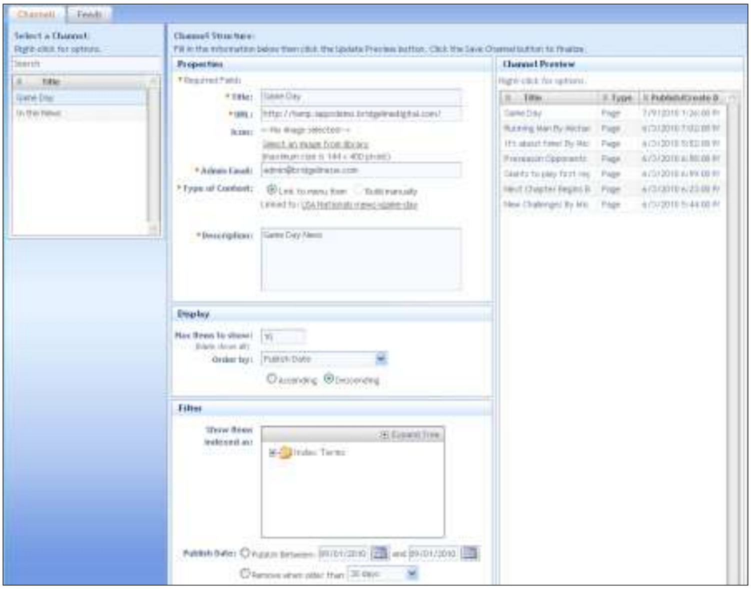
This chapter contains step-by-step instructions on how to manage RSS channels and feeds.

A Really Simple Syndication (RSS) feed contains content in the form of pages from an associated web site. A feed allows website visitors to receive automatic notifications when the content is updated instead of having to visit the website directly. RSS feeds may consist of multiple channels that contain one or more website pages. The channels make up the feed that website visitors can receive.

Only Content Administrators can perform RSS tasks, such as

- Add a new RSS channel
- Delete an RSS channel
- View and edit an RSS channel
- Add a new RSS feed
- Delete an RSS feed
- Edit an RSS feed

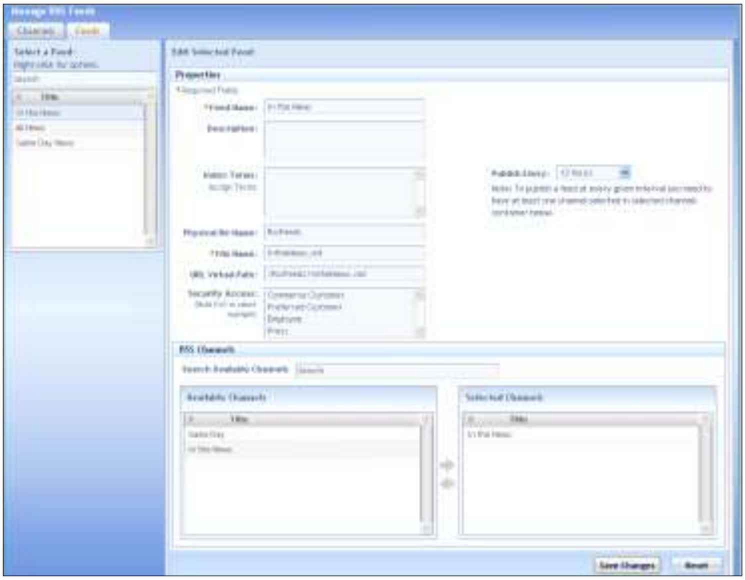
To manage RSS channels and feeds, first select **Administration → RSS** from the main navigation menu to activate the **Manage RSS Channels** container:



The ***Manage RSS Channel*** tab includes the following sections and right-click options for managing RSS channels:

Manage Channels Pane	Description	Right-Click Options
Select a Channel	A pick-list displaying the existing channels.	• Add new channel • Delete channel • View/Edit channel
Properties	Basic properties of the channel including URL.	N/A
Display	Options for controlling how channel displays on a page.	N/A
Filter	Index terms and publishing options for channel.	N/A
List Preview	Displays content items for this channel.	Automatic • Create new content of the content type selected for this channel Manually Built • Add Channel Items • Create new page

To manage RSS Feeds, click the Feeds tab to activate the ***Manage RSS Feeds*** tab.



The Manage RSS Feeds tab includes the following sections and right-click options for managing RSS feeds:

Manage Feeds Pane	Description	Right-Click Options
Select a Feed	A pick-list displaying the existing feeds.	Add new feed Delete feed View/Edit feed
Properties	Basic properties of the feed including physical directory name, filename, URL virtual path and more.	N/A
RSS Channels	Options for selecting channels with which to associate this feed.	N/A

9.1 Adding a New RSS Channel

You can create the following types of RSS channels:

Automatic	Content Manager automatically creates items of all of the pages in the selected menu directory.

Build Manually	Allows you to create items by manually selecting pages from any menu directory.

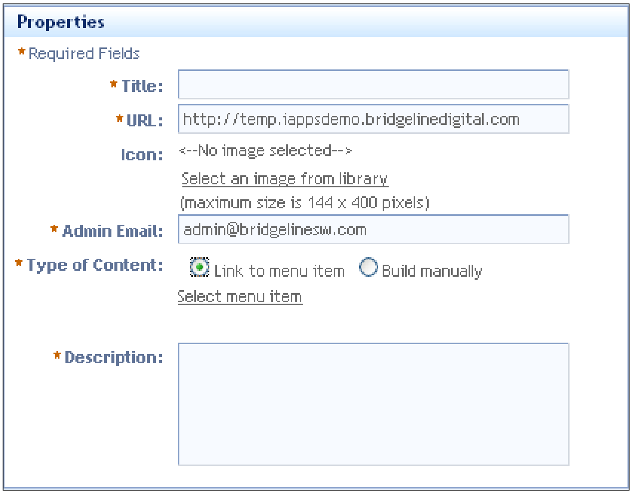
The following sections describe how to create each type of channel.

9.1.1 Adding an Automatic Channel

To add a new RSS channel, follow these steps:

- Select the **Administration → RSS** from the main navigation menu.
- Right-click an RSS channel in the Select a Channel pane and select **Add New Channel**.

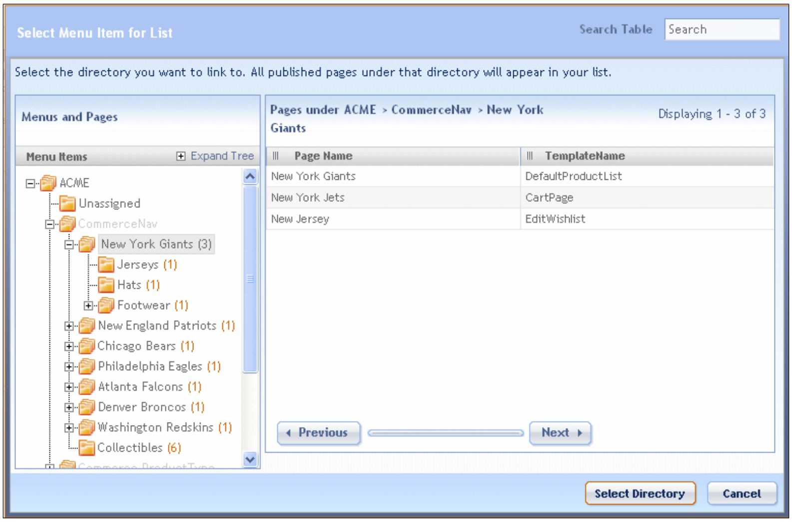
A blank RSS Channel properties page appears.

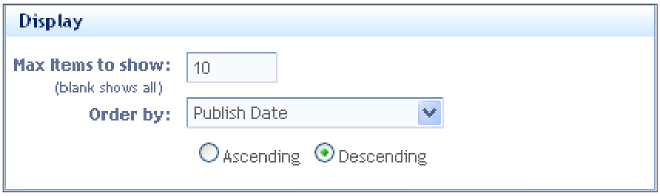


- Specify the channel properties as described in the following table:

Channel Property	Description
Title	Enter a title to name this channel.
URL	Enter the URL of this channel.

Channel Property	Description
Icon	- To select an image to use as an icon for this channel, click Select an image from library. The Insert Image from Library dialog appears. - Select a directory from the images tree. - Locate the image to use in the images list for the selected directory. - Right-click on the image and choose **Select Image**. The path and filename of the selected images appears beside Icon in the properties pane.
Admin Email	Email address of the channel administrator.
Type of Content	Specifies type of channel to create: - Click the Link to menu Item radio button. - Click the Select Menu Item link . The Select Menu Item for List dialog appears. - Click on the menu directory which contains the pages you want to use as items for this list. - Click the **Select Directory** button. The directory path appears after Linked to:
Description	Enter a brief description of the contents or use of this channel.





- Specify the display options as described in the following table:

Display Option	Description
Max Items to Show	Enter the maximum number of pages from the selected menu directory to display as channel items. Leave field blank to display all pages.
Order by:	Click the arrow in the *Order by* pick-list to specify the criteria by which to order pages from the selected directory: Title, Description, or Publish date. Click the appropriate radio button to select to display pages in ascending or descending order according to the order by criteria.

- Specify the filter options as described in the following table:

Filter Option	Description
Show Items indexed	Optionally, specify filter terms to use for this channel:

Filter Option	Description
as	• Click + to the left of Index Terms to expand the list. • Click the check box beside the Index Term folder or individual index term to add to this channel. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
Publish Date	Optionally, specify a publish date on which this channel will be available for use with one of the following options: *Publish Between* • Click the Publish Between radio button to specify a publish date range. • Click the calendar icons to specify the beginning and ending dates of the range. *Remove When Older Than* • Click the Remove When Older than radio button. • Click the arrow in the pick-list to specify an older than term. *None* • Click the None radio button to not specify a publish date.

- Click the **Update Preview** button.
  Content Manager populates the Channel Preview pane with a list of pages from the selected menu directory:

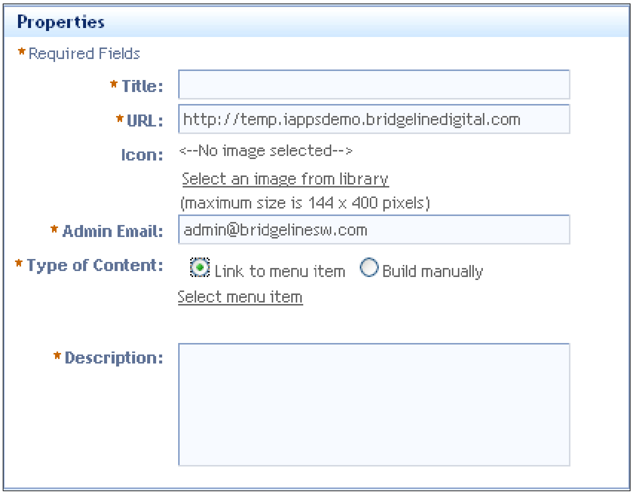
- Click the “Save Channel” button to save the new channel. The name of the new channel appears in the Select a Channel pane.

9.1.2 Adding a Build Manually Channel

To add a new RSS channel that you build manually, follow these steps:

- Select the **Administration → RSS** from the main navigation menu
- Right-click an RSS channel in the Select a Channel pane and select **Add New Channel.**

A blank RSS Channel properties page appears.



- Specify the channel properties as described in the following table:

Channel Property	Description
Title	Enter a title to name this channel.
URL	Enter the URL of this channel.
Icon	- To select an image to use as an icon for this channel, click Select an image from library. The Insert Image from Library dialog appears. - Select a directory from the images tree.

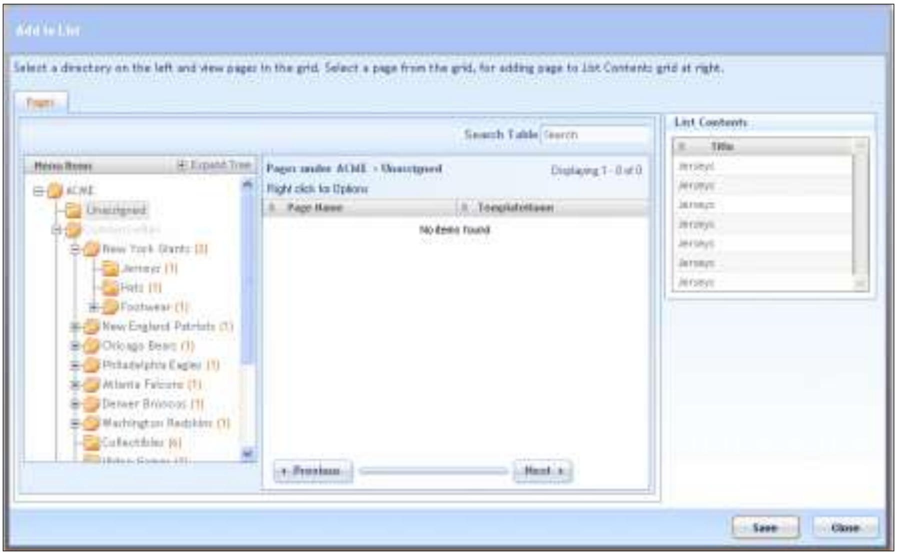
Channel Property	Description
	- Locate the image to use in the images list for the selected directory. - Right-click on the image and choose Select Image. The path and filename of the selected images appears beside Icon in the properties pane.
Admin Email	Email address of the channel administrator.
Type of Content	Specifies type of list to create: - Click the Build Manually radio button.
Description	Enter a brief description of the contents or use of this channel.

- Optionally, specify Max Items to Show in the Display options pane. Enter the maximum number of pages to display as channel items. Leave field blank to display all pages.
- Click the **Update Preview** button.
- To add items to the list, right-click on the *Right-click to create* line in the List Preview pane and select either:

Add Channel Item(s)	Create New Page
To add an existing item from a library.	To create a new page in the Menus and Page Library.

Adding Channel Items

Once you have chosen to add items, a Pages library dialog appears:



- Search through the library to locate the pages to add as channel items.
- Right-click on a page and choose **Add to List** to select it.

The title of the selected page appears in the List Contents pane.

- When you finish selecting all pages to include in the channel, click the “Save” Button.
  The Pages library dialog closes and the selected pages appear in the List Preview Pane.

Creating New

- Create a new page as described in the *Adding a Page* section of this guide.
- Select **Administration → RSS.**
- Right-click on the list to which you want to add and select **View/Edit RSS.**
- Follow the steps in *Adding List Items* section to add this item to the list.
- Click the **“**Save Channel” button to save the new channel.
  The name of the new channel appears in the Select a Channel pane.

9.2 Deleting an RSS Channel

To delete an RSS channel, follow these steps:

- Select **Administration → RSS** from the main navigation menu. The **Manage RSS Channels** page appears with the ***Channels*** tab active.
- To locate a channel either Scroll through the list or enter a name in the Search field.
- Right-click the name of the selected channel and select **Delete Channel**.

A dialog appears prompting you to confirm deletion.

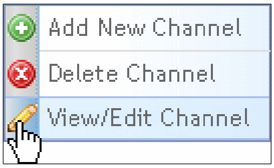
- Click the “OK” button. The deleted channel no longer appears in the Select a Channel pane.

9.3 Viewing / Editing an RSS Channel

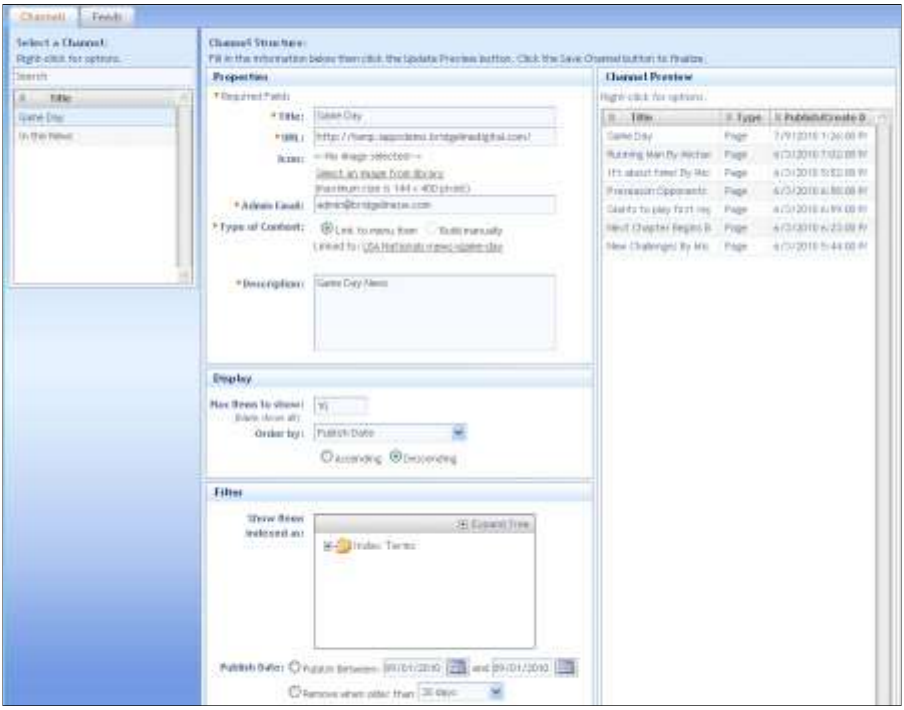
The RSS channel page displays information about the first channel listed in the Select a Channel pane by default.

To edit an RSS channel, follow these steps:

- Select **Administration → RSS** from the main navigation menu.
- To locate a channel either Scroll through the list or enter a name in the Search field.
- Right-click the name of the channel and select **View/Edit Channel**.



The RSS channel page displays information about the selected channel:



- View or edit the channel information as described in the *Adding a New Channel* section of this guide. You can edit the channel information listed in the following table:

Channel Type	Editable Information
Automatic\Build Manually	Any Property except Type of Content
Automatic	Channel Preview. • Click the **Linked to** link in Type of Content and select the menu directory containing the pages for this channel.
Automatic	Display options.
Automatic	Filter options.
Build Manually	Channel Preview. • Add or remove list items from List Preview pane. To add item(s): • Right-click on a page in the Channel Preview pane and select Add Channel

Channel Type	Editable Information
	Item(s). Follow the steps in the *Adding Channel Items* section of this guide. To remove an item: • Right-click on an item in the Channel Preview pane and select Remove Channel Item(s). Content Manager deletes the item for the List Preview pane.

- Click the **Update Preview** button to review channel information in progress, or click the "Save Channel" button to finalize the list.

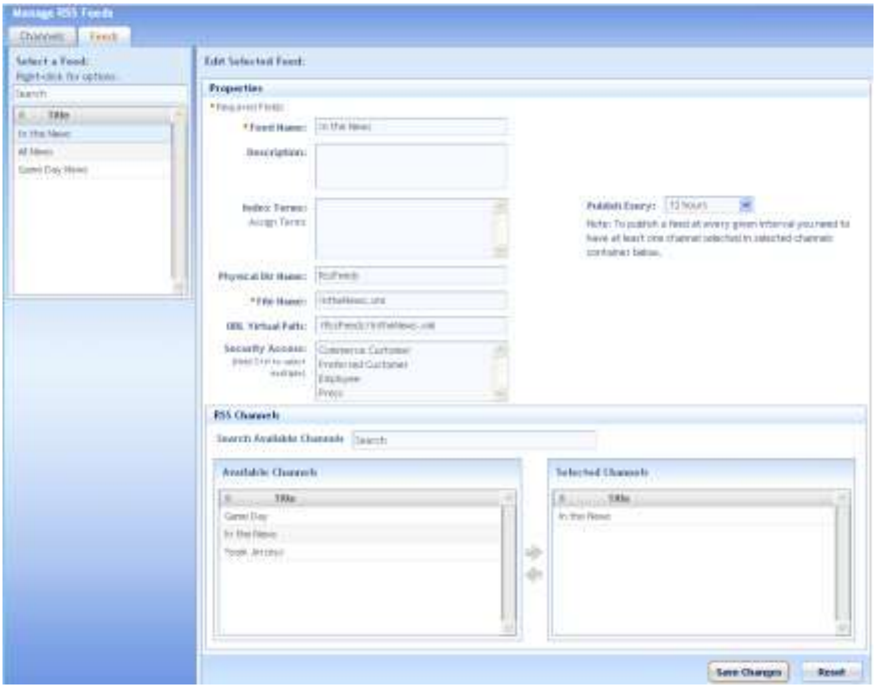
9.4 Managing RSS Feeds

Managing RSS feeds includes the following tasks:

- Add a new RSS feed
- Delete an RSS feed
- Edit an RSS feed

To access the Manage RSS Feeds page, follow these steps:

- Select **Administration → RSS** from the main navigation menu. The Manage RSS page appears.
- Click the ***Feeds*** tab to make it active. The **Manage RSS Feeds** container appears: From here you can go to Add, Delete and Edit Feeds.

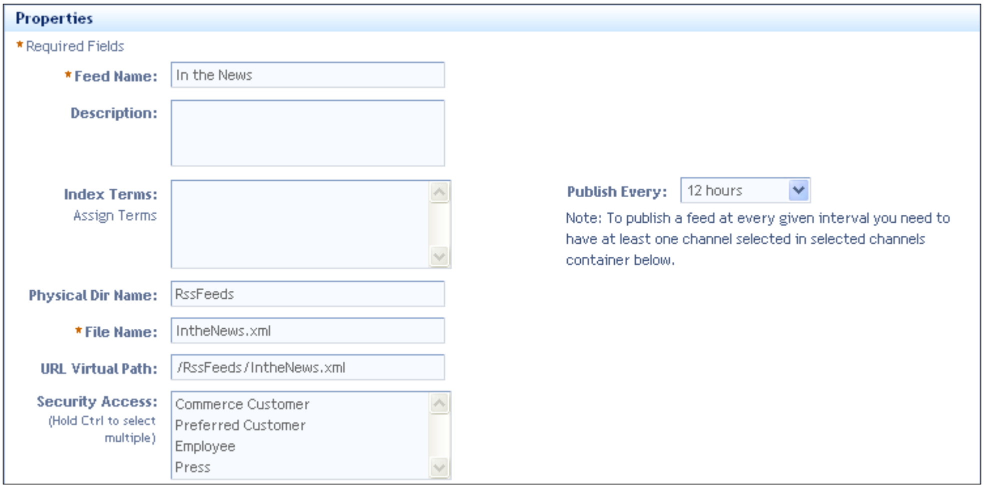


9.5 Adding a New RSS Feed

To add a new RSS feed:

- Right-click a feed in the Select a Feeds pane and select **Add New Feed.**

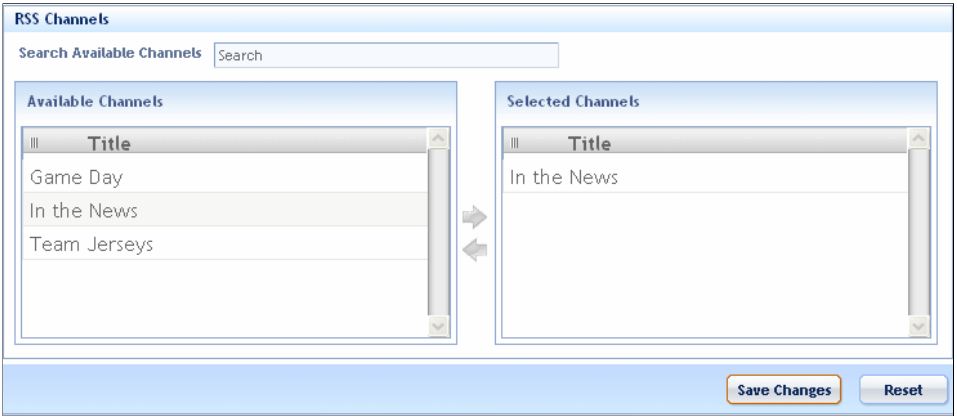
A blank Properties pane appears:



Complete the fee properties information as described in the following table:

Feed Property	Description
Feed Name	Enter name for this feed.
Description	Enter a brief description of the contents or use of this feed.
Index Terms: Assign Terms	Displays index terms assigned to this post, which Content Manager displays in the Categories column in the posts lists. • Click the Assign Terms link to specify index terms for this post. • The Assign Index Terms dialog appears. • Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder. • Click the “Save Index Terms” button.
Physical Dir Name	Name of physical directory where Content Manager stores feeds.
File Name	Name of physical file associated with this feed.
URL Virtual Path	Specifies the URL off of the main site’s domain (for example, http://www.bridgelinedigital.com/) where a user can access the RSS feed. For example, /RSS/NewsFeed/ would place the RSS feed at the URL of http://www.bridgelinedigital.com/RSS/NewsFeed/.
Security Access	Scroll through the security pick-list and click on a security level to assign to this feed. Optionally, press Ctrl-click to select more

	than one security level.
Publish Every	Click the arrow in the combo-box and select the term at which you want Content Manager to publish this feed. You must associate this feed with an RSS channel for Content Manager to publish it.



- Select an RSS Channel for this feed:

  - Click on a Channel in the Available Channels pick-list.

  - Click  to add that Channel to the Selected Channels pick-list.

  - Click  to remove a Channel from the Selected Channels pick-list.

- Click the “Save Changes” button. The RSS feed appears in the Select a Feed pane.

9.6 Deleting an RSS Feed

Only users with the Content Administrator role can delete an RSS feed.

To delete an RSS feed, follow these steps:

- To locate a feed either enter a feed name in the Search field or Scroll through the list.
- Right-click the name of the feed and select Delete Feed.

A dialog appears prompting you to confirm deleting this feed: Click the "OK" button.

The feed no longer appears in the Select a Feed pane.

9.7 Viewing / Editing an RSS Feed

To view and edit an RSS feed, follow these steps:

- To locate a feed either enter a feed name in the Search field or Scroll through the list.
- Right-click the name of the feed and select **View/Edit Feed**.

- Information about the selected feed appears in the **Manage Feeds** container.
- View or edit the feed information as described in the *Adding a New Feed* section of this guide.
- Click the "Save Changes" button.

10 MANAGING DATA LIBRARIES

The Data Libraries consist of the following:

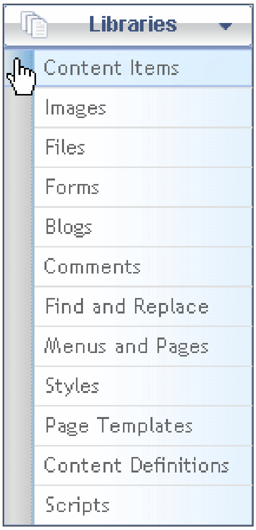
- Content Items Library
- Images Library
- Files Library
- Forms Library
- Blogs Library

10.1 Managing the Content Items Library

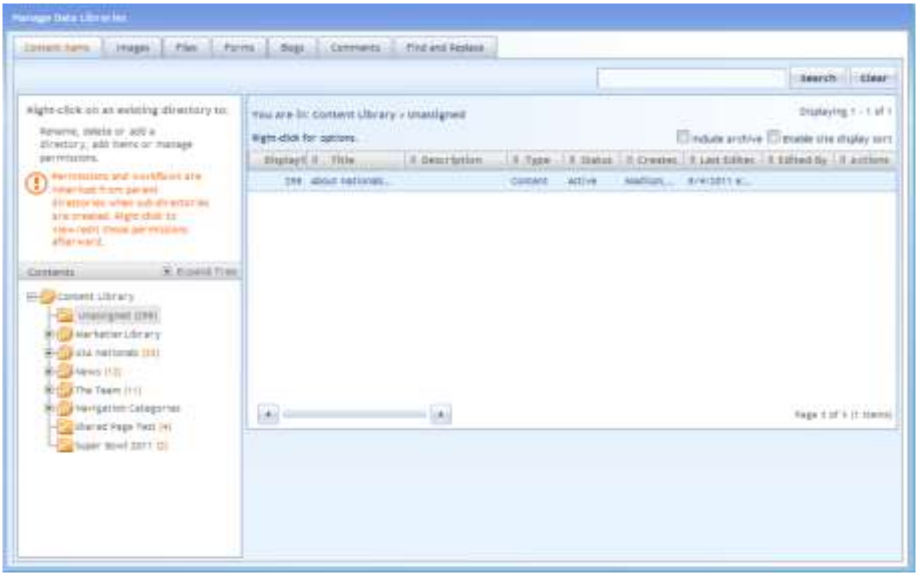
Content Items are stored for use on the website in various libraries. Generally only Content Administrators or Managers can edit the Content Library. You can perform the following tasks for the Content Items Library:

- Add a new content item
- Edit properties or text of a content item
- Assign index terms to a content item
- Archive a content item

To manage the Content Items Library, you first select **Libraries → Content Items** from the main navigation menu.



The **Manage Data Libraries** container appears with the ***Content Items*** tab active:



The ***Content Items*** tab displays the following:

- The Content Library directory tree structure on the left
- A list of content items in the selected directory on the right. The Content Library displays information about each content item.

Content Item Descriptions

Content Items Field	Description
Display	Content Manager automatically assigns a number to each content item added to the library. Click the Display heading to sort the content item list by item number.
Title	Name of content item in Content Manager.
Description	Brief explanation of the content item.
Type	Type of template used for this content item.
Status	“Active” or “Archived.” “Active” can be inserted into a page.

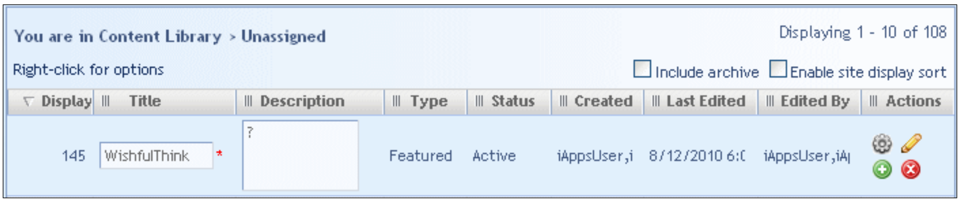
Content Items Field	Description
	“Archived” exists in library but cannot be used in a page.
Created	Name of user who added item to library.
Last Edited	Date on which content item was added or last edited.
Edited By	Name of user who last edited item.

10.1.1 Editing Content Item Properties

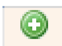
To edit content item properties:

- Right-click the content item and select **Edit Properties**:

The selected content item fields become editable. You can edit the “Title” and “Description”:



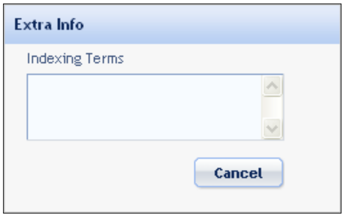
To edit the XML content of an item, click the Edit icon . The ***Manage Content Definition*** pop-up appears.

- Edit the content in the editor window and click the “Save” button to save your edits and return to the Content Items list.
- Click  under ***Actions*** to save all changes.

10.1.2 Assigning Index Terms to a Content Item

You can assign index terms (tags that you can use programmatically to aggregate pages or filter lists) to content items in a number of ways.

While editing or adding a Content Item, you can specify Index Terms by clicking the Extra Info icon 

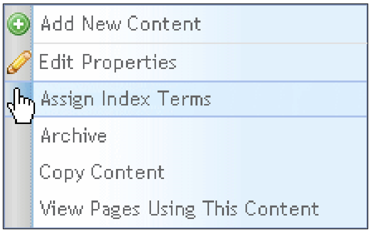


- Enter index terms from your list.

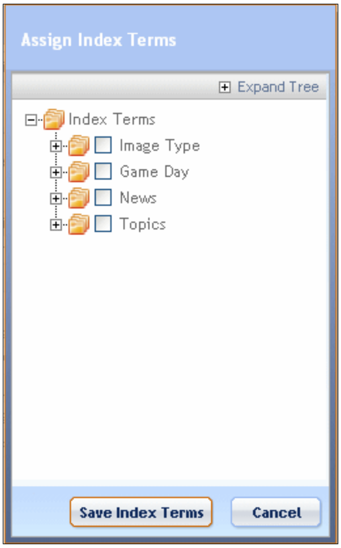
Alternatively, select **Libraries → Content Items** from the main navigation menu at the top of Content Manager

Manage Data Libraries appears with the ***Content Items*** tab active.

- Right-click the content item and select **Assign Index Terms.**



The **Assign Index Terms** dialog box appears:



- Click the check box(es) beside an Index Term folder or individual Index Terms to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
- Click the “Save Index Terms” button.

10.1.3 Archiving/Making Active a Content Item

Content Manager does not delete archived content items, but makes them unavailable by moving them to an archived folder.

To archive a content item, follow these steps:

- Select **Libraries → Content** Items from the main navigation menu. The **Manage Data Libraries** container appears with the ***Content Items*** tab active.

> ⓘ To view archived content items in the list, click the *Include Archive* check box at the top of the content item list.

- Right-click the name of a content item and select **Archive** or **Make Active** as appropriate.

Content Manager displays a warning dialog indicating when a content item you select to archive is being used:

- Click the *Archive* button. Content Manager changes the status it displays for the content item in the content item library list and either:
    - Moves an archived file to the archived folder
    - Removes an activated file from the archived folder.

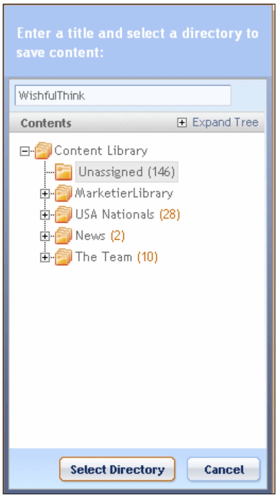
10.1.4 Copying Content

You can create a new content item by copying the content of an existing content item.

To copy an existing content item, follow these steps:

- Select **Libraries → Content Items** from the main navigation menu. **Manage Data Libraries** appears with the ***Content Items*** tab active.
- Right-click the name of a content item and select **Copy Content.**

A dialog box appears:



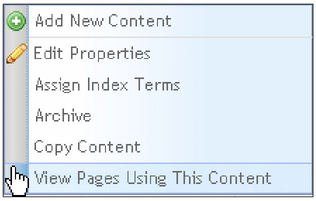
- Enter a title for the new content item in the text field at the top of the dialog.
- Click the directory in which to store the content item.
- Click the *Select Directory* button.

Content Manager creates a copy of the selected content item and saves it with the specified title in the content item library.

10.1.5 Viewing Pages Using a Content Item

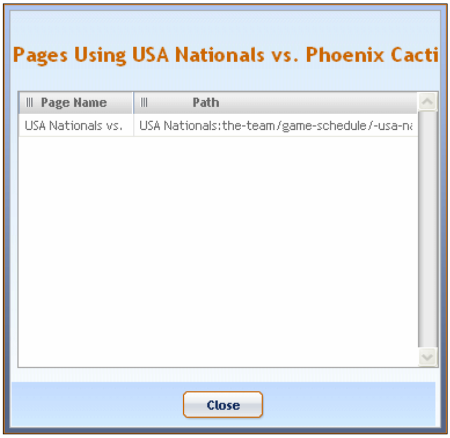
To view the pages using a content item, follow these steps:

- Select **Libraries → Content Items** from the main navigation menu at the top of Content Manager
  Manage Data Libraries appears with the ***Content Items*** tab active.
- Right-click the name of a content item and select **View Pages Using this Content**.



A dialog appears displaying either:

- No pages use the selected content item
- List of the pages that use the selected content item.



- Click the **Close** button to close dialog.

10.2 Managing the Images Library

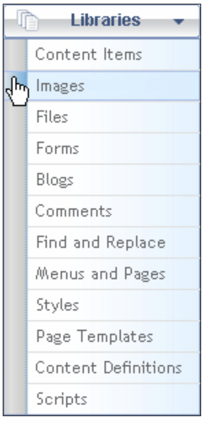
The Images library stores image files for use on the website.

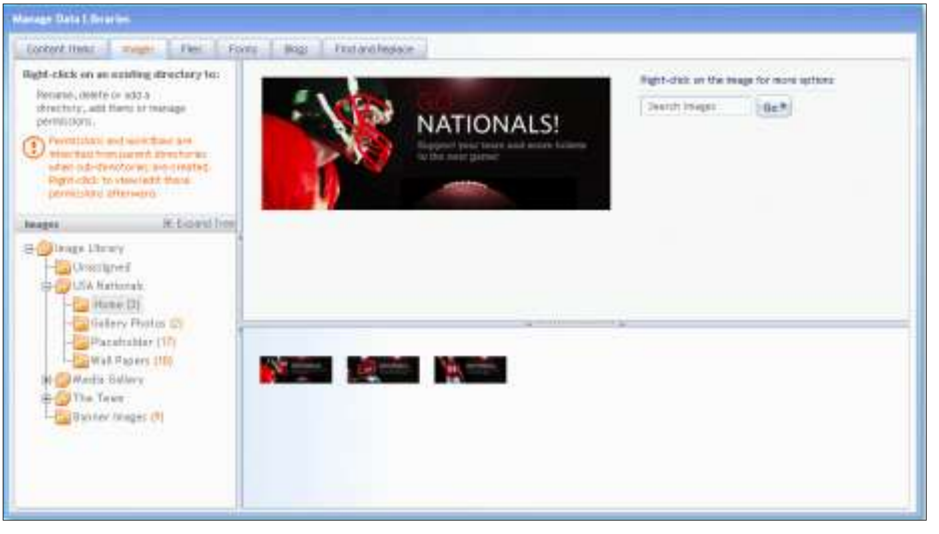
While managing the Images Library, you can perform the following tasks:

- Search Images Library
- Add images to directory
- Sort images in directory
- Edit image
- View/Edit image information
- View the history of an image and rollback to a previous version
- Show the actual size of an image

- Assign index terms to an image
- Delete an image

To manage the Images Library, you first select **Libraries → Images** from the main navigation menu at the top of Content Manager, or if already in **Manage Data Libraries**, click the *Images* tab.





The images tab is divided into three panes:

- Left pane displays: the Images Library directory tree structure

- Right pane top displays: the Search images field and a large view of the selected image
- Right pane bottom displays: a list of Images in the selected directory

From the Images Library you can perform the following actions with Images:

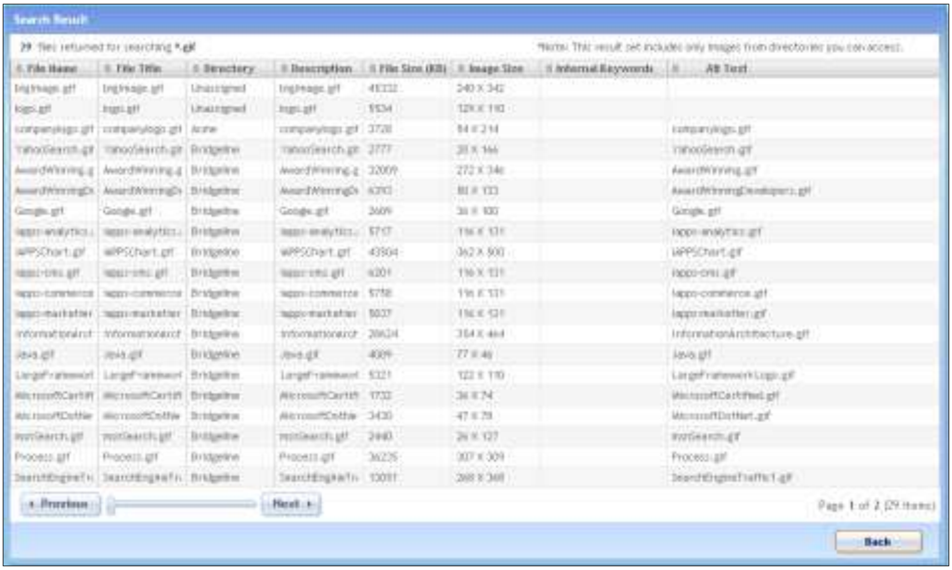
Pane	Right-Click Context Menu Option
Left	• Add image(s) to directory
Right - Top	• Search Images Library • Assign index terms • Edit image • View/Edit image information • Show actual size • Delete image
Right - Bottom	• Search Images Library • Assign index terms • Edit image • View/Edit image information • Show actual size • Delete image • Add images • View History / Rollback • Sort images by . . • View pages using this image

10.2.1 Searching the Images Library

To search for an image in the Images library, follow these steps:

- Select **Libraries → Images** from the main navigation menu.
  The **Manage Data Libraries** container appears with the ***Images*** tab active.
- Enter search term in the search field and click the *Go* button.

Content Manager displays a list of images matching your search criteria:



> ⓘ The search results display only images from directories in the Images Library that you can access.

The search results display the following information about each image listed:

Images Search Results Column	Description
File Name	Name of physical image file.
File Title	Title of image in Content Manager Images Library.
Directory	Images Library directory where image is stored.
Description	Brief description of the content or use of this image.
File Size	Physical size of file in number of Kilobytes (KB).
Image Size	Image display dimensions in pixels, specified as width by height.

Images Search Results Column	Description
Internal Keywords	Specify any descriptive keywords about the page to help power the internal site search engine.
Alt Text	Text to display in place of the image in the event that a browser cannot display the image.

From the Search Results, you can:

Search Results Right-click Options	Description
View History / Rollback	Displays image version and uploaded date and allows you to rollback image to earlier version.
Show Actual Size	Displays the image size in a pop-up window.
Open Image/File Directory	Displays the Image Library directory tree.

After viewing search results, click the **Back** button to return to the Images Library list.

10.2.2 Sorting Images in a Directory

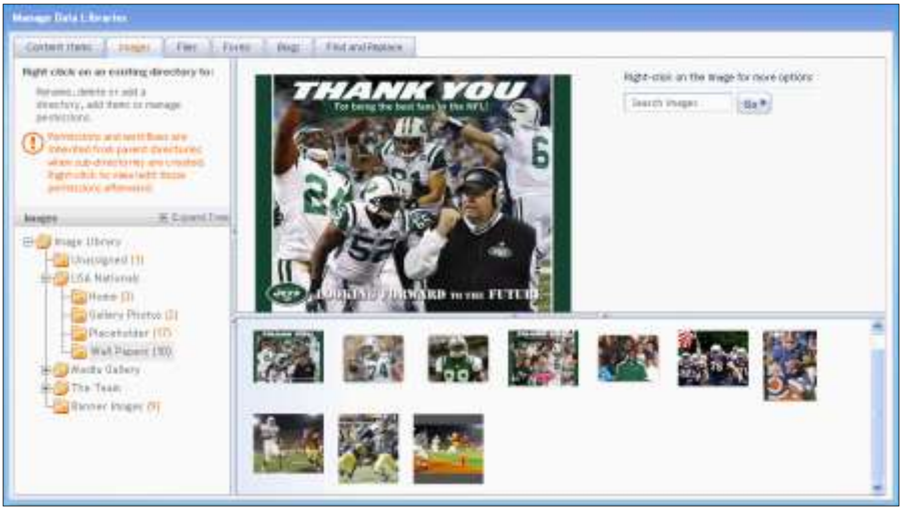
You can select the order by which images in a directory are sorted for display.

Sort options include by:

- File name
- File title
- File size
- Upload date

To select the order by which pictures are sorted in a directory, follow these steps:

- Click the name of a directory in the Images directory tree.
  The right panes display the images in that directory.



- Right-click on an image in the bottom-right pane and select **Sort Images By.**

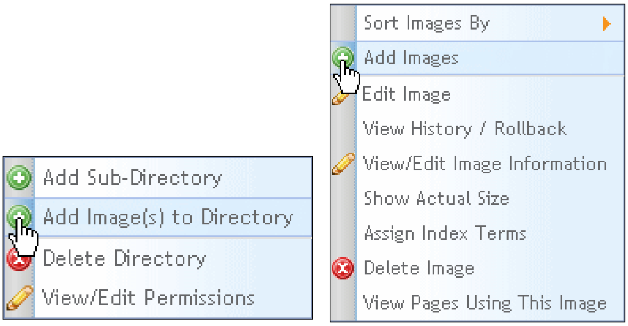
- Click the sort type.

Content Manager sorts the images according to your sort order selection.

10.2.3 Adding an Image

To add an image to the Images Library from the

Directory Tree	Bottom Images Pane
Right click on a directory and select **Add Image(s) To Directory**.	Right click on image and select **Add Images**.



An Upload files dialog appears.

- Click the **Browse** button to locate files.
  A Select files dialog appears.

- Locate and select the image to download and click the **Open** button.
  The name of the image appears the Image / File Quick Upload dialog.

- Click the **Upload Files** button.
  An Upload Status dialog appears.

- Click the *Close* button when the upload completes to close the Status dialog.
- Click the *Close* button to close the Image / File Quick Upload dialog.

The uploaded image appears in the directory.

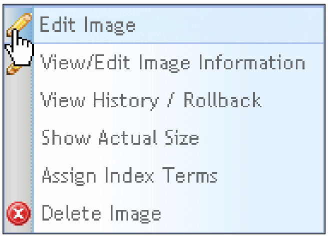
10.2.4 Editing an Image

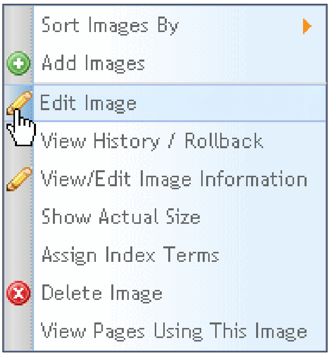
Content Manager provides you with the following options for editing an image:

- Crop
- Rotate left or right
- Flip vertically or horizontally
- Resize

To edit an image in Content Manager, follow these steps:

- Select **Libraries → Images** from the main navigation menu.
  The **Manage Data Libraries** container appears with the ***Images*** tab active.
- Right-click on an image in the top or bottom images pane and select **Edit Image.**



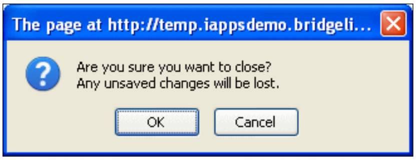


An Editing image dialog appears:

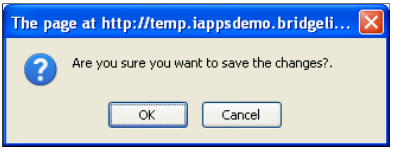
Edit the picture as follows:

Edit Option	Description
	Crop image.
	Rotate left.
	Rotate Right.
	Flip vertical.
	Flip horizontal.
Resize	- By exact width and height of image: Enter number of pixels in width and height fields. - Constrained by specified width: Click the *Constrain: width* radio button and enter number of pixels in Width field. - Constrained by specified height: Click the *Constrain: height* radio button and enter number of pixels in height field.

To cancel changes and:

Keep Editor Open	Close Editor
Click the “Reset Original Image” button. Content Manager discards changes and keeps image open in editor.	• Click the “Close” Button. • A dialog appears, warning that changes will be lost.  • Click the “OK” button. Content Manager discards changes to the image and closes the editor.

To save changes to:

Existing File	New File
Click the “Save” Button. A dialog appears prompting you to confirm.  Click the “OK” button. Content Manager overwrites existing image file to reflect edits and closes the image editor.	• Click the “Save As” button. A save content dialog box appears. • Enter a title for the new image in the text field at the top of the dialog. • Click the directory in which to store the content item. • Click the **Select Directory** button. Content Manager saves the edits to a new Image file with the specified title in the Images Library and closes the image editor.

10.2.5 Inserting Image Maps

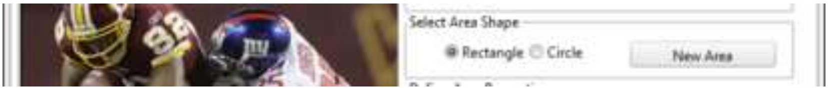
You can turn your images into “image Maps” once inserted. This simply means choosing one or more areas that will operate as a hyperlink and bring you to another page in the site or an outside url in the same way that a text hyperlink does. You might want to do this to allow clickable text within an image or to allow “button” functionality within an otherwise solid image.

To create image maps,

1. Select an image in a content area, content definition, or container, right click the

image and select **Image Map Editor.**

2. In the Image Map Editor dialog box, choose an appropriate shape (circle or square).



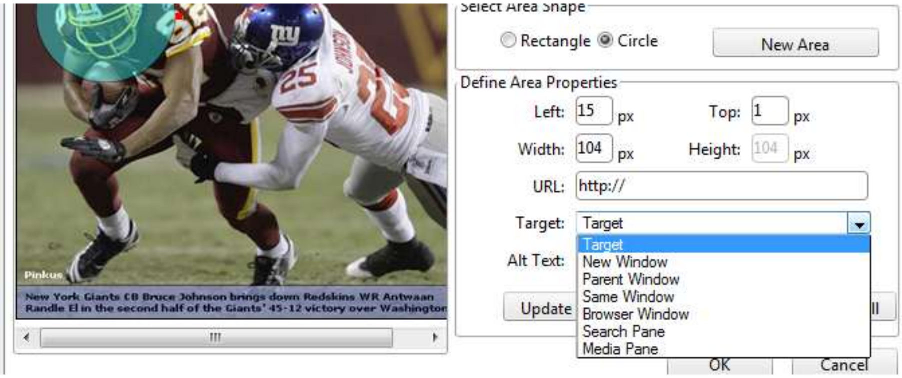
3. Click on the image and drag your mouse to create the “hot spot” for your image. It will appear as an aqua shape. You can drag the area around the image and resize it by dragging on the tiny red square at the edge of the image map.

4. Next enter the URL you would like your area to connect to.

5. Next, select how you want your area to behave. Opening in a New Window is

best for external URLs and Same Window is best for within your site.

6. Be sure to add alternate text.



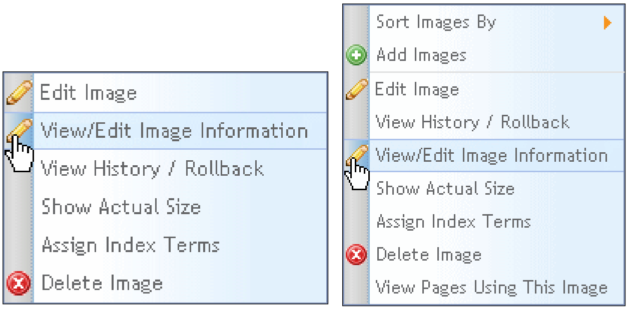
7. If you want to add more than one hotspot, simply click “New Area,” and then return to the photo or graphic to add another shape. If you decide you’ve made a mistake, highlight the hot area and click “Remove Area”

8. Click “OK” when you are finished to return to Site Editor. Don’t forget to Save as Draft , publish the page or submit it to workflow.

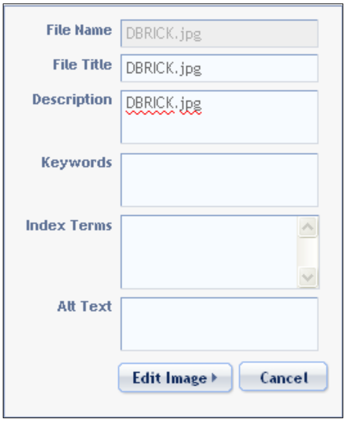
10.2.6 Viewing/Editing Image Information

To view and edit image information, follow these steps:

- Select **Libraries → Images** from the main navigation menu or click the *Images* tab in the **Manage Data Libraries** container.
- Right-click an image in the top or bottom images pane and select **View/Edit Image Information.**



An image information pop-up appears:



View or edit the image information as follows:

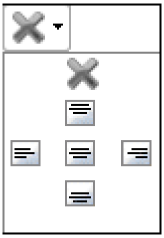
Image Info. Field	Description
File Name	Name of physical image file.
Title	Name of image file in Content Manager.
Description	Brief explanation of the content or use of the image.
Keywords	Enter or edit keywords.
Index Terms	Remove index terms from this image.
Alt Text	Text to display if a browser cannot display image.

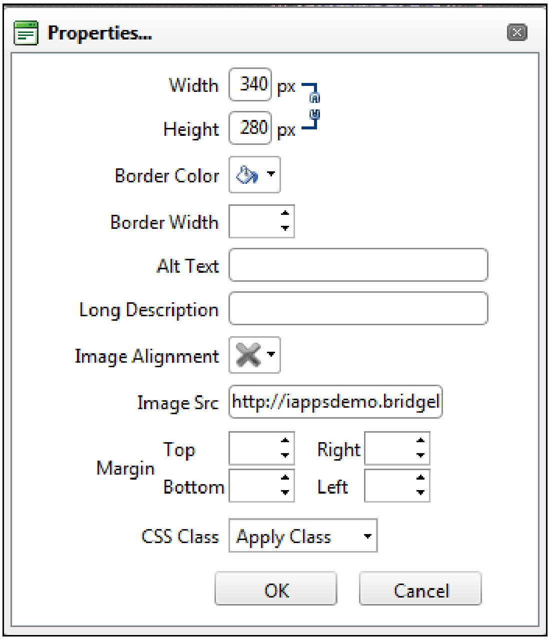
- Click the **Edit Image** button to save your edits.

10.2.6.1 Viewing/Editing Image Properties

You can also see and change image Properties by right-clicking on an image that is inserted into a page.

This will bring up a dialog box that will allow you to add descriptions and Alt Text (described in the table above) as well as easily change the picture size, margins (the space between the image and its surrounding text) or add or change the image border color and width. Click on Image Alignment to change the alignment of the image within the text area or container (centered, up, down, or left or right). Click "OK" to continue.



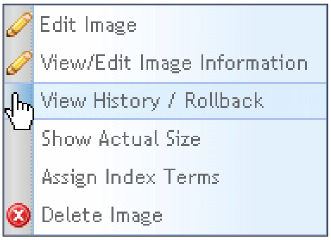


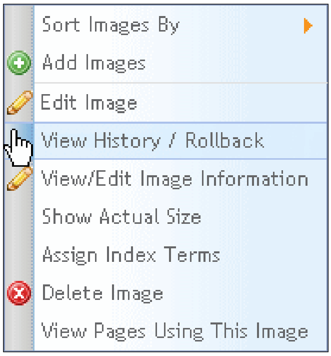
10.2.7 Viewing Image History/Rolling-back an Image

To view image history or rollback to a previous version, follow these steps:

Select **Libraries → Images** from the main navigation menu or from the **Manage Data Libraries** page select the *Images* tab.

Right-click an image in the top or bottom images pane and select View History / Rollback.





The **Image History for [selected image]** page appears, displaying the information described in the following table:

Image History Field	Description
Version #	Each time a user edits an image and saves the changes, Content Manager saves a unique copy of the image and assigns it a two part version number, #.#. Content Manager increments the version number as follows: • First part - increments each new day that an image is saved. • Second part - increments each time on any given day that the image is saved.
File Size (KB)	Physical size of file in number of Kilobytes (KB).
Date First Used	Date on which a user first selected to insert this image in a page or page template.
Uploaded By	Name of user who uploaded image into Image library.

After viewing image history, click the **Return to Image Library** button to exit.

Optionally, to rollback the image to an earlier version, right-click on the version you want to rollback to and select Rollback to This Version.

Content Manager rolls the image back to the selected version and displays the Image Library.

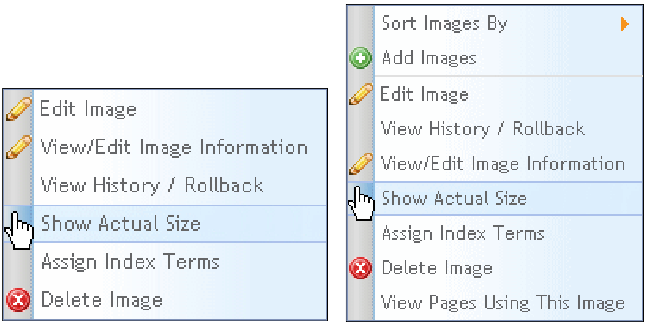
10.2.8 Viewing Actual Size of Image

Only users with the Content Administrator or Manager role can edit image information. Users with the viewer role can only view the image information.

To view actual size of an image, follow these steps:

Select Libraries → Images from the main navigation menu. The Manage Data Libraries container appears with the Images tab active.

Right-click an image in the top or bottom images pane and select **Show Actual Size**.



Content Manager displays a full size view of the image in a pop-up window:

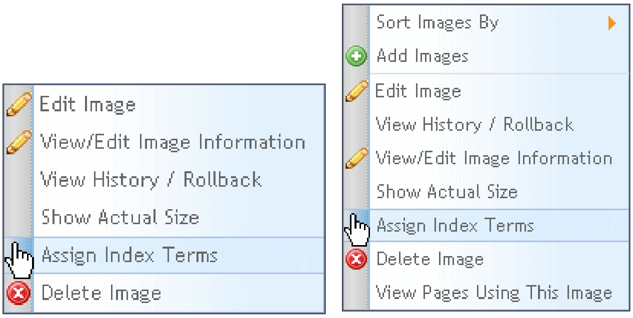
Click the **Close** button to close the pop-up window.

10.2.9 Assigning Index Terms to Image

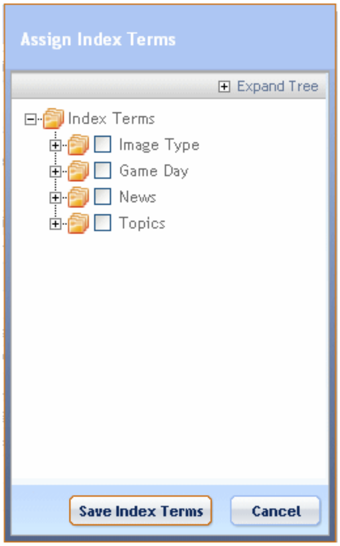
To assign index terms to an image, follow these steps:

- Select **Libraries → Images** from the main navigation menu.
  The Manage Data Libraries page appears with the Images tab active.

- Right-click an image in the top or bottom images pane and select **Assign Index Terms.**



The **Assign Index Terms** dialog box appears:

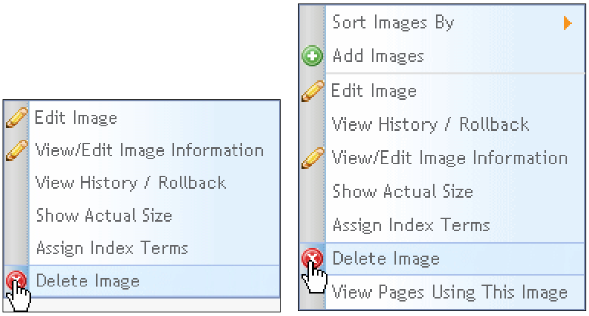


- Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
- Click the “Save Index Terms” button.

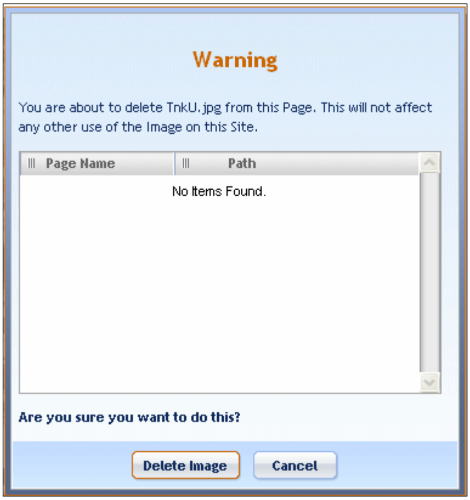
10.2.10 Deleting an Image

To delete an image, follow these steps:

- Select **Libraries → Images** from the main navigation menu. The Manage Data Libraries container appears with the ***Images*** tab active.
- Right-click an image in the top or bottom images pane and select **Delete Image**.



A warning dialog box appears, prompting you to confirm that you want to delete image:



- Click the **Delete Image** button.

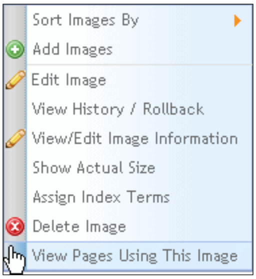
  Content Manger permanently removes the image from the Image Library.

10.2.11 Viewing Pages Using an Image

To view pages using an image, follow these steps:

- Select Libraries → Images from the main navigation menu.
  The Manage Data Libraries page appears with the Images tab active.

- Right-click an image in the bottom images pane and select **View Pages Using This Image**.



A dialog appears displaying either:

- No items found or
- A list of the pages that use the selected image.

Click the **Close** button to close dialog.

ⓘ Note: This functionality only works immediately when an image is inserted into an image container on a template. If you insert images into a rich text container, it will not come up as being used on that page until the site is refreshed overnight.

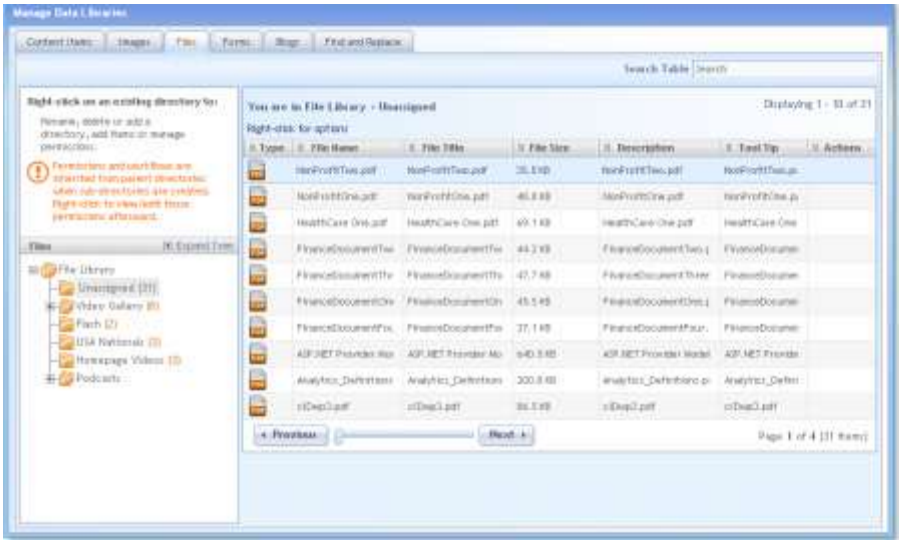
10.3 Managing the Files Library

To manage the Files Library, you can perform the following tasks:

- Add a file
- View a file
- Edit file properties
- View the history / rollback a file
- Delete a file
- Assign index terms to a file
- View pages that use a file

To manage the Files Library select:

Libraries → Files or if already in **Manage Data Libraries,** click the ***Files*** tab.



The Files tab displays the following:

- The Files Library directory tree structure on the left
- A list of files in the selected directory on the right

The Files library displays the following information about each file in the selected directory:

Files Library Field	**Description**
Type	File format or association with program that created it.

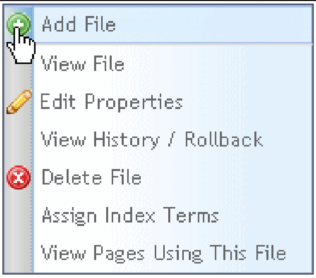
File Name	Name of physical file.
File Size	Size of physical file in Kilobytes (KB).
Description	Brief description of the content of the file or its use.
Tooltip	Information about this file that Content Manager displays as a tooltip.

10.3.1 Adding a File

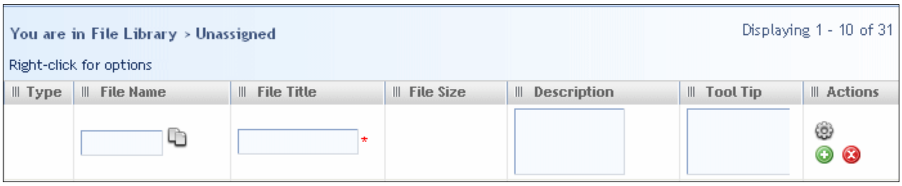
Only users with the Content Administrator or Manager role can add a file. Users with the Viewer role can only view the contents of this library.

To add a file to the Files Library, from the

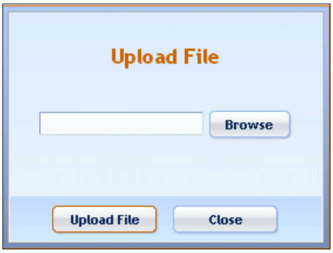
Directory Tree	**Files List**
Right click on a directory and select **Add File(s) To Directory**.	Right click on a file in the files list and select **Add File.**



A new row appears in Files list with editable fields.

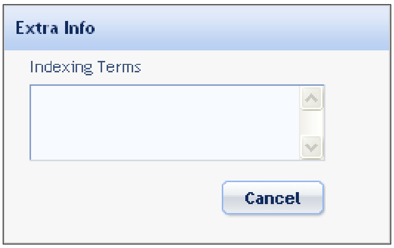


Complete the new file information as follows:

Files Library Field	Description
File Name	• Click to select the file to add. • An Upload File dialog appears.  • Click Browse • Locate and select the file to upload • Click Open. The name of the selected file appears in the Upload File dialog. • Click Upload File. The name of the selected file appears in the *File Name* field.
File Title	Enter a name for this file in CMS.
Description	Enter a brief description of the contents of this file or its use.
Tooltip	Optionally, enter information about this file for Content Manger to display as a tooltip.

Optionally, to specify indexing terms, click the Extra Info icon .

The Extra Info pop-up appears:



Add index term and Click  under Actions to Save.

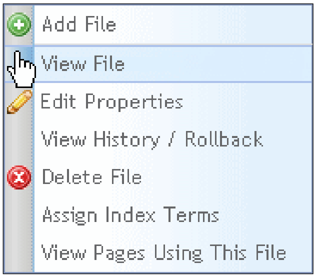
Content Manger adds the new file to the Files library.

10.3.2 Viewing a File

To view a file, follow these steps:

Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.

Right-click the file you want and select **View File**.



Content Manager displays the content of the file in a new browser window.

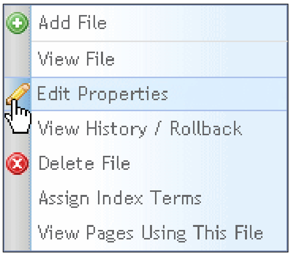
Close the window when you finish viewing the file contents.

10.3.3 Editing File Properties

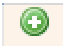
To edit the properties of a file, follow these steps:

Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.

- Right-click a file and select **Edit Properties.**



The property fields for the selected file become editable:

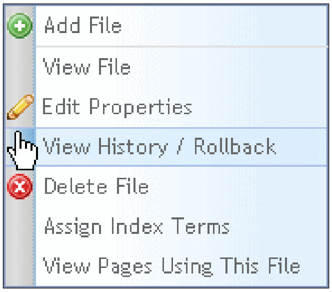
- Edit the file properties as described in the *Adding a File* section.
- Click  under Actions to save all changes.

10.3.4 Viewing File History / Rolling-back

To view the history of / rollback a file, follow these steps:

Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.

- Right-click a file and select View History / Rollback.



The History for selected image page appears, displaying the information described in the following table:

File History Field	Description
Version #	Each time a user saves a file, Content Manager saves a unique copy of the file and assigns it a two part version number, #.#. Content Manager increments the version number as follows: • First part - increments each new day that a file is saved. • Second part - increments each time on any given day that the file is saved.
File Size (KB)	Physical size of file in number of Kilobytes (KB).
Date First Used	Date on which a user first selected to insert this file in a page or page template.
Uploaded By	Name of user who uploaded file into Image library.

- After viewing file history, click the **Return to Image Library** button to exit.

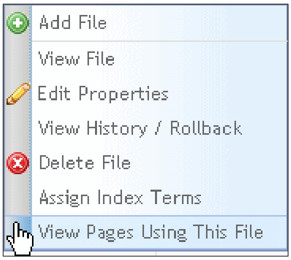
Optionally, to roll back the file to an earlier version, right-click on the version you want to rollback to and select Roll Back to This Version.

Content Manager rolls the file back to the selected version and displays the Files Library.

10.3.5 Viewing Pages Using a File

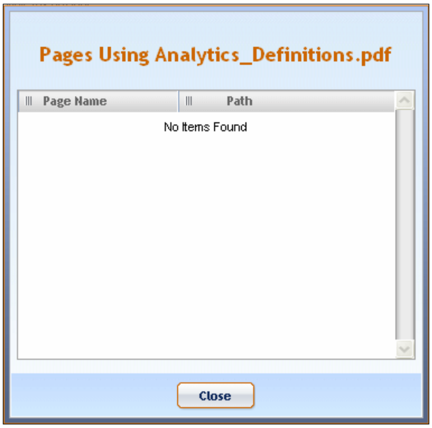
To view pages that use a file, follow these steps:

- Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.
- Right-click a file and select **View Pages Using This File**.



A dialog appears displaying either:

- A message that no pages use the selected file
- A list of the pages that use the selected file.



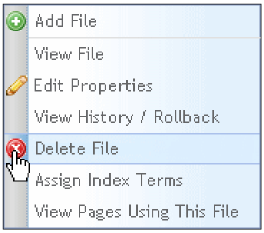
- Click the **Close** button to dismiss the dialog.

ⓘ Note: This functionality only works immediately when a file is inserted into a dedicated container on a template. If you insert files into a rich text container, they will not come up as being used on that page until the site is refreshed or indexed overnight.

10.3.6 Deleting a File

To delete a file, follow these steps:

- Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.
- Right-click a file and select Delete File.



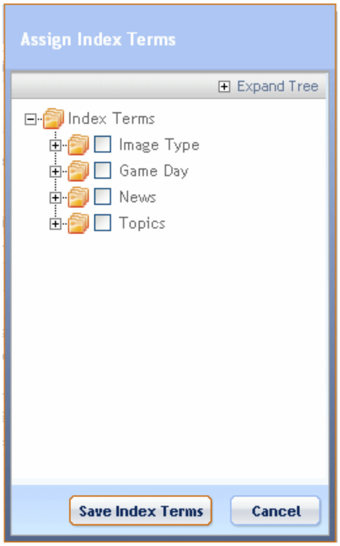
A warning dialog appears, prompting you to confirm deleting the file and all of its versions.

- Click the “Delete” button.
  A file deleted successfully dialog appears.
- Click “OK”.
  Content Manager removes the deleted filed from the Files library.

10.3.7 Assigning Index Terms to Files

To assign index terms to a file, follow these steps:

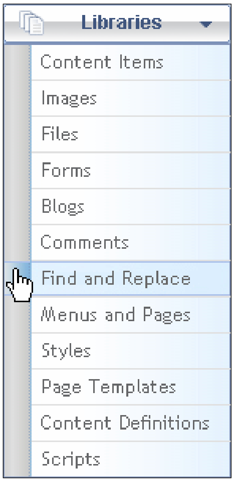
- Select **Libraries → Files** from the main navigation menu or the ***Files*** tab of the **Manage Data Libraries** container.
- Right-click a file and select **Assign Index Terms.** The Assign Index Terms dialog appears:



- Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder.
- Click the “Save Index Terms” button.

10.4 Searching / Finding / Replacing Data Libraries

You can search the Data Libraries to find, or to find and replace a term included in a file or item in the Data Libraries or specified as the value of property of a file or item in the Data Libraries.



To begin searching the Data Libraries, either:

- Select **Libraries → Find and Replace** from the menu bar, or click on the ***Find and Replace*** tab of the **Manage Data Libraries** Container.

Finding

To find or to find and replace in the data library:

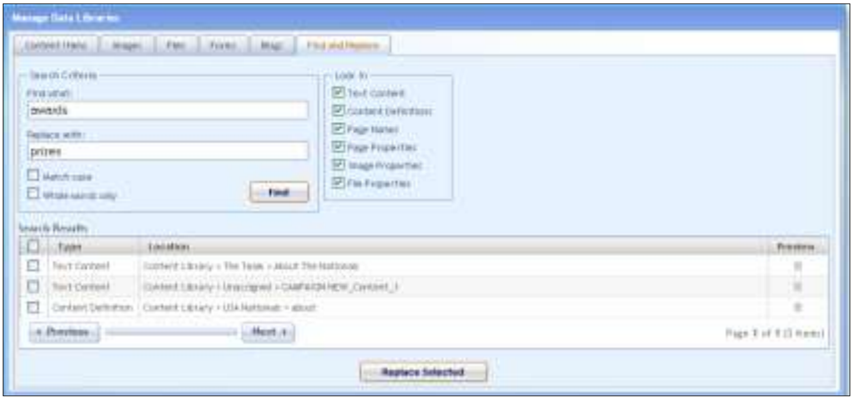
- Specify find and replace criteria as described in the following table:

Search Criteria	Description
Look in:	Click the checkbox beside each of the Data Library sections in which to search.
Find what:	Specify a search term as: • A letter • A portion of a word • A complete word

	• A phrase (multiple words separated by spaces)
Replace with:	Specify a term to replace the search term as: • A letter • A portion of a word • A complete word • A phrase (multiple words separated by spaces)
Match case	Click the Match case check box for Content Manager to find only terms that match the exact case as you entered the search term.
Whole words only	Click the Whole words only check box for Content Manager to find only whole words that match the search criteria that you entered.
Replace with:	Optionally, specify a term to replace the search term. Content Manager performs the replace as a separate operation from the find so you can specify a replaced term either before running or after running a search and successfully locating items that match the search criteria.

- Click the Find button.

  Content Manager displays the results of the search at the bottom of the page:

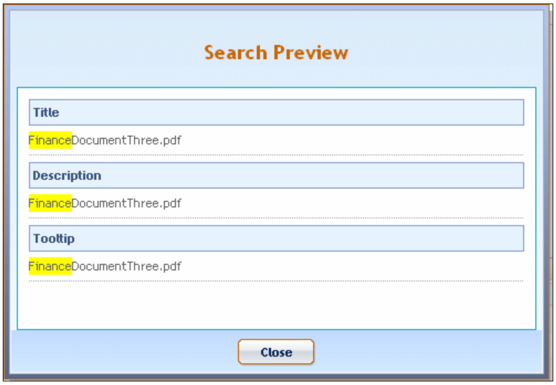


Optionally, to view where the search criteria term appears in an item appearing in the search results, click in the Preview column of that item.

Content Manager displays a preview of the search term located:

Within a document:

Within a Data Libraries properties section:



- Click the **Close** button to close the preview dialog.

Replacing

To replace a term that appears in a Data Libraries file or properties field, follow these steps:

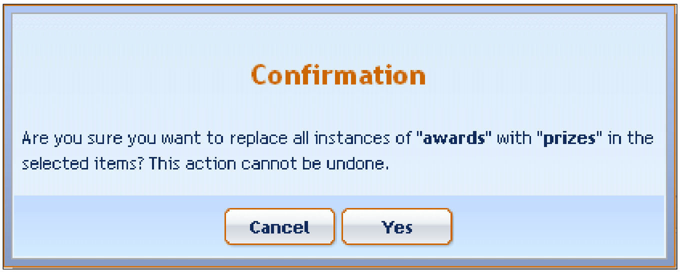
Enter a replacement term in the Replace with: field in the *Search Criteria* section of the page, if you haven't already.

Select the items in the search results list for which you want to replace the Find term as follows:

Select File Method	Description
All search results items	Click the checkbox in the left corner of the Search Results header field to replace the found term in all search results.
Selected items	Click the checkbox beside each item to select.

- Click the **Replace Selected** button.

  A dialog appears displaying the selected replacement conditions and prompting you to confirm that you want to perform this action:



- Click **Yes**. A Find and Replace progress dialog appears:

Optionally, click in the Preview column of a selected item to view the changes.

10.5 Managing Data Libraries Directories

Only users with the Content or Site Administrator roles can add or edit directories and sub-directories in the Content Items, Images, Files or Forms Libraries.

You can manage the directories of the following Data Libraries:

- Content Items
- Images
- Files
- Forms

To manage these directories, you can perform the following tasks:

- Add directory under library root directory
- Add sub-directory under a library sub-directory
- Rename a directory
- Delete a directory
- View / Edit permissions

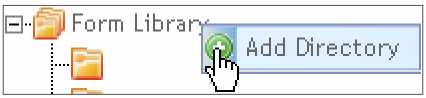
You can also upload files to the Files Library and images to the Images Library.

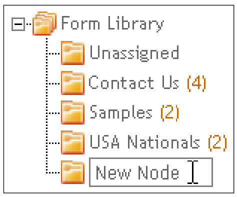
10.5.1 Adding a Directory under the Library Root

You can add a directory under the library root directory.

To add a directory under the library root directory, follow these steps:

- Right-click on the library root directory name (Content Library, Image Library, File Library, or Form Library) and select **Add Directory.**





- A New Node appears in the directory tree:
- Enter a name for the new directory and press *Enter.*

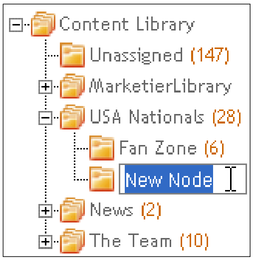
10.5.2 Adding a Sub-Directory

This example shows how to add a sub-directory in the Content Items Library. The steps are the same for the other Libraries.

To add a sub-directory, follow these steps:

- Right-click the directory to which you want to add a sub-directory and select Add Sub-Directory.

A new node appears under the selected directory:



- Enter a name for the sub-directory and press the Enter key.

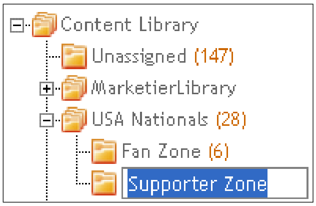
10.5.3 Renaming a Directory

This example shows how to rename a directory in the Content Items Library. The steps are similar for the other Data Libraries.

To rename a directory, follow these steps:

- Right-click the directory and select Rename Directory.

The directory name becomes editable:



- Edit the directory name and press Enter.

10.5.4 Deleting a Directory

When you delete a directory, Content Manager moves any files in that directory to the unassigned directory for that Data Library.

This example shows how to delete a directory in the Content Items Library. The steps are similar for other Data Libraries.

To delete a directory:

- Right-click the directory and select **Delete Directory.**

A dialog appears prompting you to confirm that you want to delete this directory:

- Click the “OK” button.

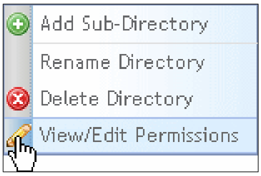
  Content Manager deletes the directory and moves any files in that directory to the unassigned directory for that Data Library.

10.5.5 Viewing / Editing Permissions for a Directory

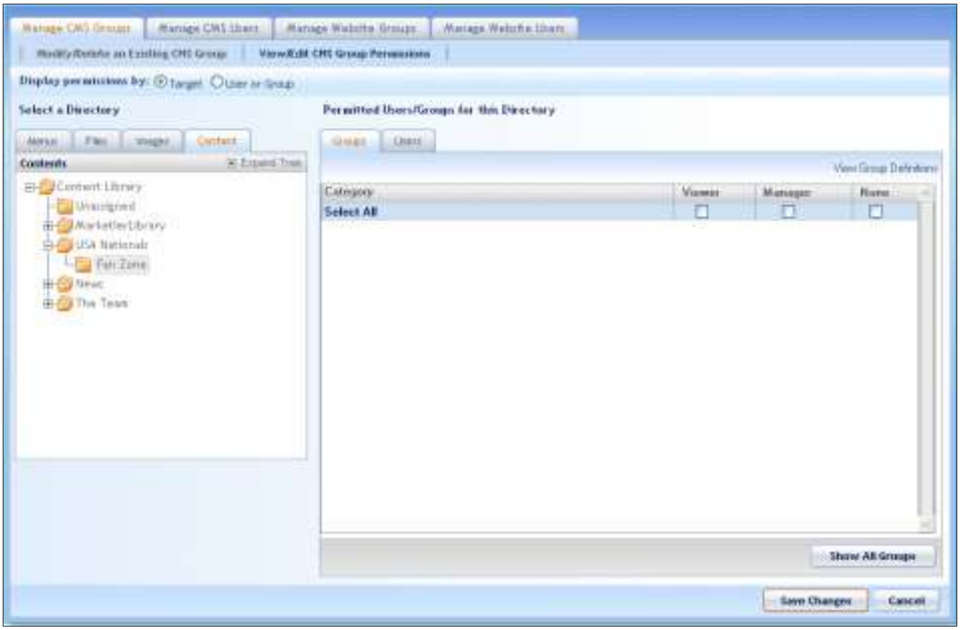
This example shows how to view/edit permissions in the Content Items Library. The steps are similar for the other Data Libraries.

To view/edit permissions, follow these steps:

- Right-click the directory and select **View/Edit Permissions.**



The ***Manage CMS Groups*** tab appears:



- Click on the directory you want to view in the Contents directory tree.
  The Permitted Users/Groups for this directory appear in the Groups tab.

- View and edit the permissions as needed and click the “Save Changes” button to save changes and return to the Data Library or the “Cancel” button to return to the Data Library without saving changes.

11 MANAGING DISPLAY LIBRARIES

This chapter contains step-by-step instructions on how to manage Display Libraries. The Display Libraries consist of the following:

- Styles Library
- Page Templates Library
- Content Definitions Library
- Scripts Library

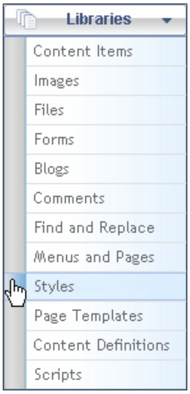
ⓘ Only Content Administrators can perform the actions in the chapter.

11.1 Managing Style Library Contents

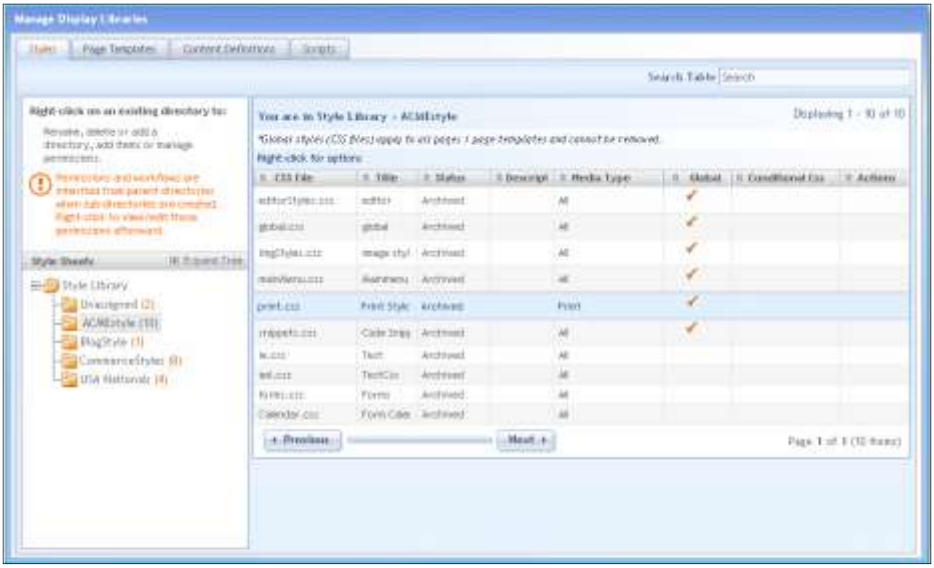
Cascading Style Sheet (CSS) files automatically format content so that users are saved this step and uniform styles are used for content through the site. To manage the Styles Library, you can perform the following tasks with CSS files:

- Add a CSS file
- Archive/Make Active
- Edit properties
- View the CSS source file
- View pages using a CSS file

To manage the Styles Library, select **Libraries → Styles** from the main navigation menu at the top of Content Manager:



The **Manage Display Libraries** container appears with ***Styles*** tab active:



The ***Styles*** tab displays the following:

- The Styles Library directory tree structure on the left
- A list of styles in the selected directory on the right

The Style library displays the following information about each Style:

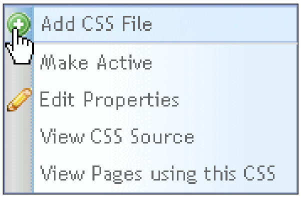
Style Library Field	Description
CSS File	Name of physical .css file associated with this style.
Title	Name of style in Content Manager associated with this .css file.
Status	Active or Archived. Active styles are available for use on a Page Template or Page. Archived styles exist in the library but are not available for use on a Page Template or Page.

Style Library Field	Description
Description	Brief explanation of the contents or use of this style.
Media Type	Specifies the type of media that renders this style when accessing page. Options include: All, Screen, Projection, Handheld, Print
Global	Click checkbox to indicate that this style is applied globally to all pages/page templates throughout iAPPS CMS.
Conditional CSS	Specifies conditions under which to use this Style.

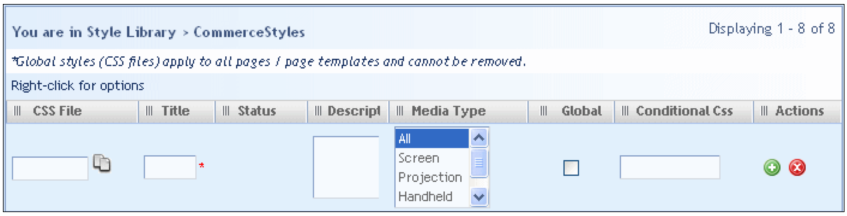
11.1.1 Adding a CSS File

You add a CSS file when you want to establish a new style for use in Pages. To add a CSS file, follow these steps:

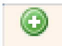
- Select **Libraries → Styles** from the main navigation menu. The **Manage Display Libraries** container appears with the Styles tab active.
- Right-click on an existing CSS file in the Style library list and select **Add CSS File**.



A new row with editable fields appears in the Style library list:



- Complete the new style definition.

- Click  under ***Actions*** to save this style. The new style appears in the Style library list.

11.1.2 Archiving / Making Active a CSS File

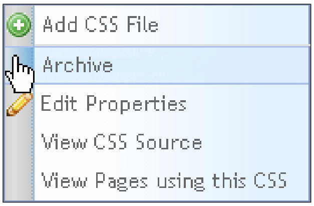
Only users with the Content Administrator role can archive a CSS file.

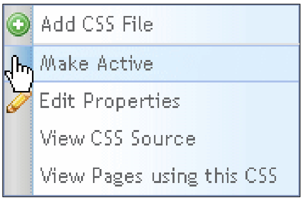
ⓘ An archived CSS file is not deleted from CMS, but moved into an archived folder.

To archive/make active a CSS file, follow these steps:

Select **Libraries → Styles** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Styles*** tab active.

Right-click on an existing CSS file in the Style library list and select **Archive** or **Make Active** as appropriate.





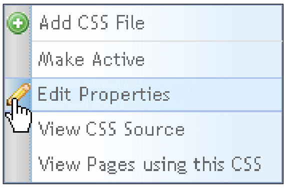
iAPPS CMS changes the status it displays for the style in the Style library list and either:

- Moves an archived style to the archived folder
- Removes an active style from the archived folder.

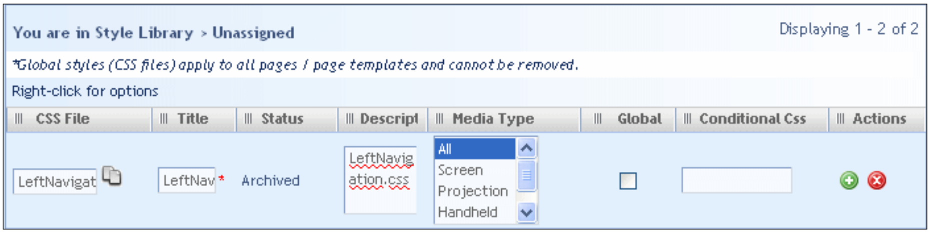
11.1.3 Editing CSS File Properties

To edit CSS file properties, follow these steps:

- Select **Libraries → Styles** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Styles*** tab active.
- Right-click on an existing CSS file in the Style library list and select **Edit Properties**.



The property fields of the selected css file become editable:



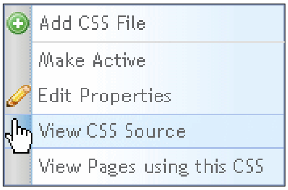
- Edit the properties of this css file as described in [Managing Style Library Contents].
- Click  under Actions to save changes to this style.

The property changes appear in the Style library list.

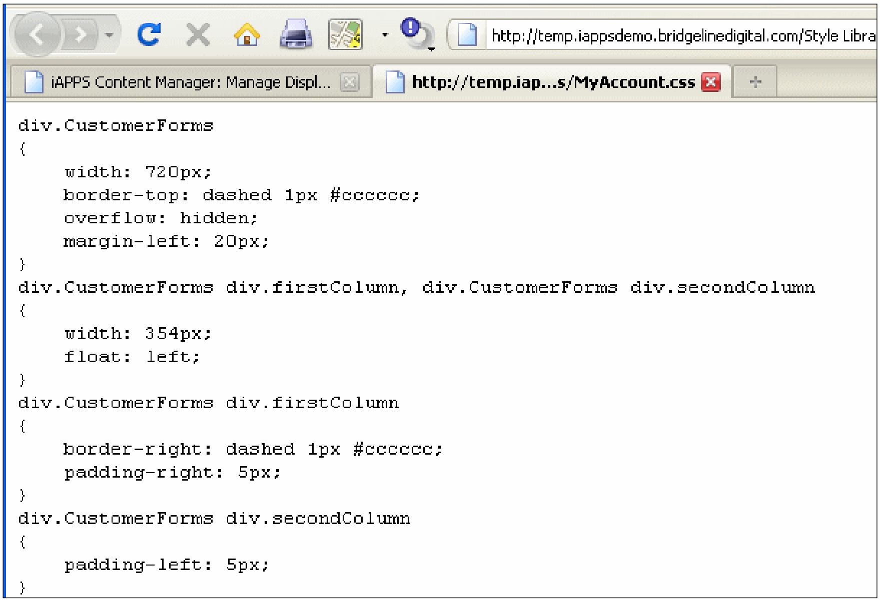
11.1.4 Viewing a CSS Source File

To view a CSS source file, follow these steps:

- Select **Libraries → Styles** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Styles*** tab active.
- Right-click on an existing CSS file in the Style library list and select **View CSS Source**.



Content Manager opens a new window or tab in your Internet browser and displays the content of the selected .css file:

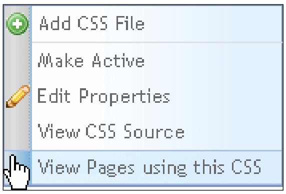


- View the CSS source file, then close the browser tab or window when you finish.

11.1.5 Viewing Pages Using This CSS

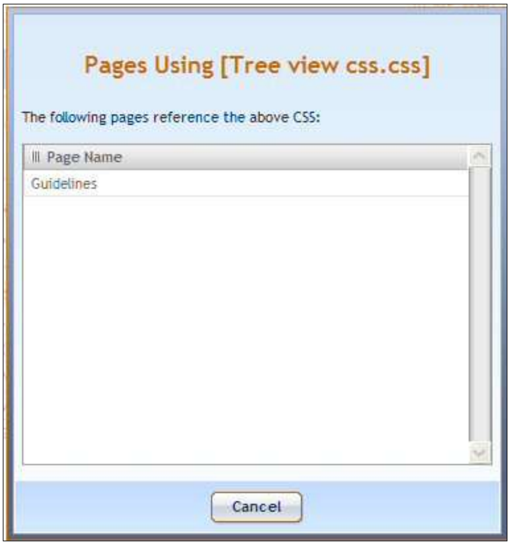
Only users with the Content Administrator role can view pages using a CSS file. To view pages using a CSS file, follow these steps:

- Select **Libraries → Styles** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Styles*** tab active.
- Right-click on an existing CSS file in the list and select **View Pages using this CSS**.



A **Pages Using** [CSS file] dialog appears, displaying either:

- A list of the pages using the selected CSS file
- A message indicating that no pages reference the selected CSS file



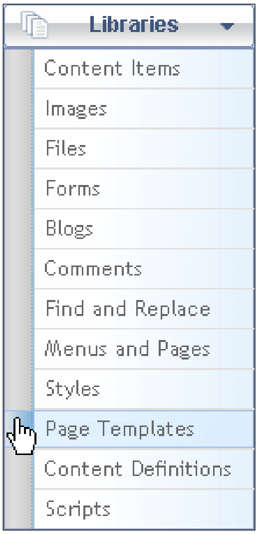
View the dialog, then click the “Cancel” button to return to the Style library.

11.2 Managing Page Templates Library Contents

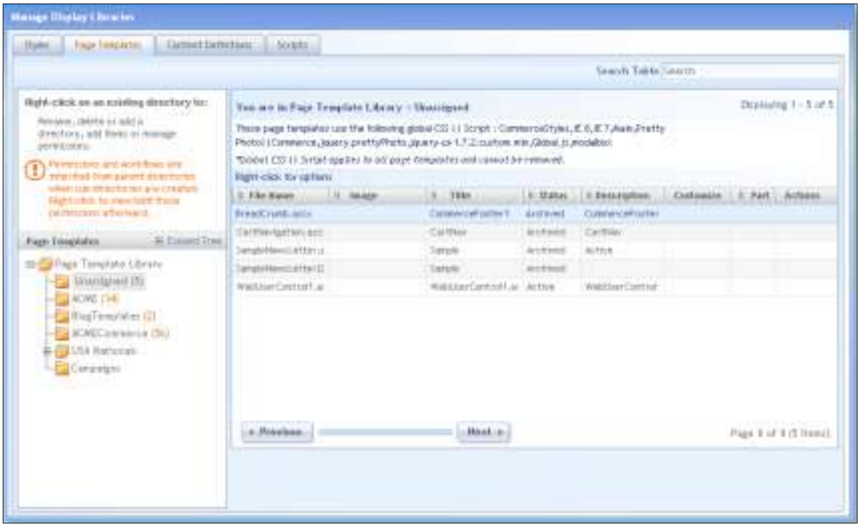
To manage the Page Templates Library, you perform the following tasks:

- Add a page template
- Preview a page template
- Archive/Make active a page template
- Edit properties
- View pages using a page template

To manage the Page Templates Library, select **Libraries → Page Templates** from the main navigation menu, or if you are already on the **Manage Display Libraries** container click the ***Page Templates*** tab.



The **Manage Display Libraries** container appears with the ***Page Templates*** tab active.



The ***Page Templates*** tab displays the following:

- The Page Template Library directory tree structure on the left
- A list of Page Templates in the selected directory on the right

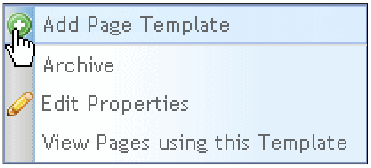
The Page Templates library displays the following information about each template:

Page Template Field	Description
File Name	Name of physical .ascx file associated with this page template.
Image	Image file that shows example of page template format.
Title	Name of page template style.
Status	Active or Archived. Active page templates can be used for creating a new page. Archived page templates exist in the library but cannot be used to create new pages.
Description	Brief explanation of the contents or use of this page template.
Customize	Click CSS or JS to select additional CSS (style) or JS (script) files to add to this template.
Part	Click part check box to indicate that this template is a page part; a template used in other templates.

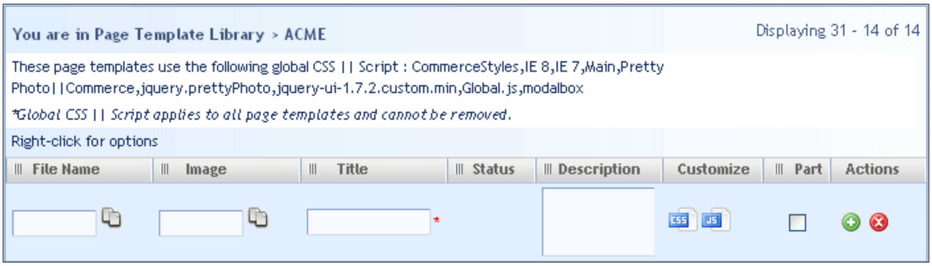
11.2.1 Adding a Page Template

Only users with the Content Administrator role can add a page template. To add a page template:

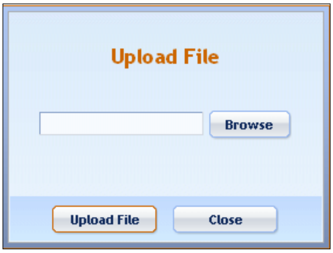
- Select **Libraries → Page Templates** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Page Templates*** tab active.
- Right-click the name of an existing template and select Add Page Template.

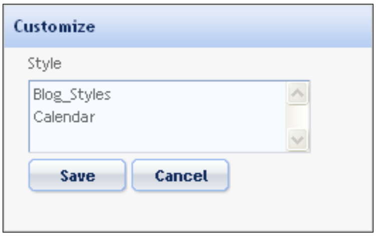


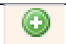
A new record appears in the page template list with editable fields:



Enter the new page template information as described in the following table:

Page Template Field	Description
File Name	To add a .ascx file for this page template, click . An Upload File dialog appears.  Click “Browse.” Locate and select the .ascx file associated with this page template. Click “Open.” The name of the selected file appears in the *Upload File* dialog. Click “Upload File.” The name of the selected file appears in the “File Name” field.
Image	To add an Image file that shows an example of this page template, click . An Upload File dialog appears. Click “Browse.” Locate and select the image file representing this page template.

Page Template Field	Description
	Click “Open.” The name of the selected file appears in the *Upload File* dialog. Click “Upload File.” The name of the selected file appears in the *Image* field.
Title	Enter a title for this page template.
Description	Enter a brief explanation of the contents or use of this page template file.
Customize	Click CSS or JS to select an additional CSS (style) or JS (script) file to add to this template. A Customize *Style* or *Script* dialog appears:  - Select a file from the list. - Click Save.
Part	Click part check box to indicate that this template is a page part; a template used in other templates.

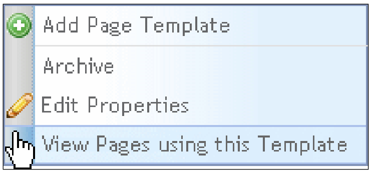
- Click  under Actions to save this new page template record.

11.2.2 Viewing Pages Using a Template

You can view pages that use a template. To do so:

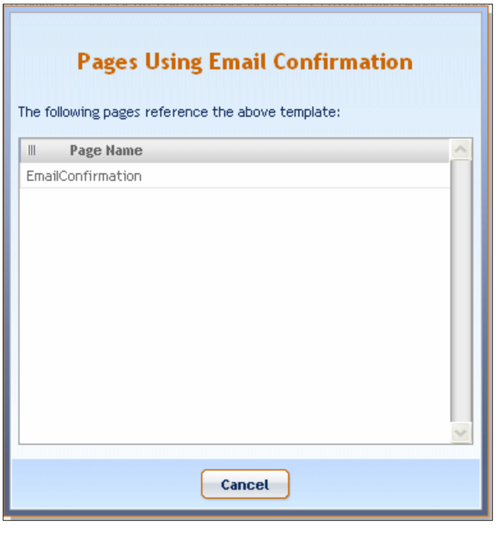
- Select **Libraries → Page Templates** from the main navigation menu.
  The **Manage Display Libraries** container appears with the Page Templates tab active.

- Right-click the name of an existing template and select **View Pages using this Template**.



A dialog appears displaying either:

  - No pages use the selected template
  - List of the pages that use the selected template.

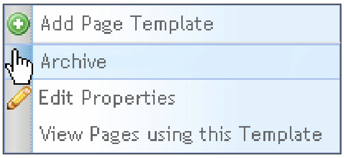


Click the "Cancel" button to close the dialog.

11.2.3 Archiving / Making Active a Page Template

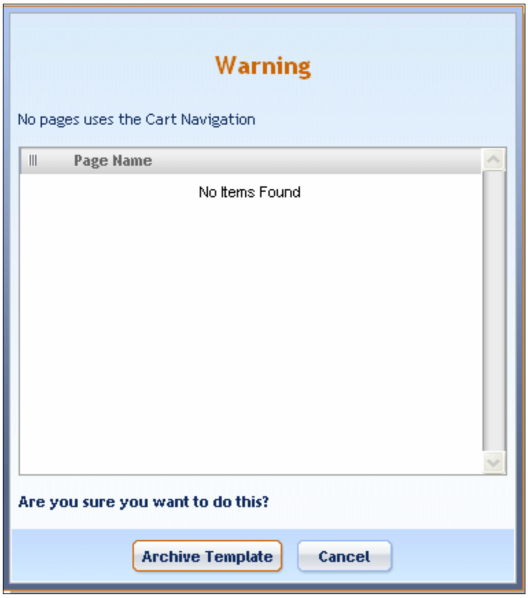
To archive a template, follow these steps:

- Select **Libraries → Page Templates** from the main navigation menu at the top of the iAPPS CMS page. The **Manage Display Libraries** container appears with the ***Page Templates*** tab active.
- Right-click the name of an existing template and select Archive Template.



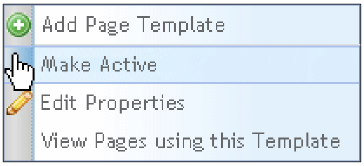
A warning dialog appears, listing the pages that use this page template, if any:

ⓘ Archiving a page template that is currently used by a page can corrupt that page. View and change any pages using a template before you archive.



- Click "Archive Template." Users can no longer create a new page based on this page template. The selected page template:
    - Appears in the Page Template library list with a status of *Archived*.
    - No longer displays in the *Template Name* list in the Page library.

To make a page template active again, right-click the name of a template with a status of *Archived* and select **Make Active**.



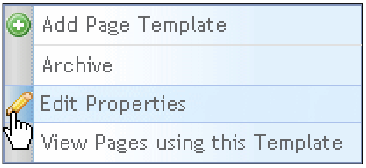
Users can now create a new page based on this page template. The selected page template:

- Appears in the Page Template library list with a status of Active.
- Displays in the *Template Name* pick-list in the Page library.

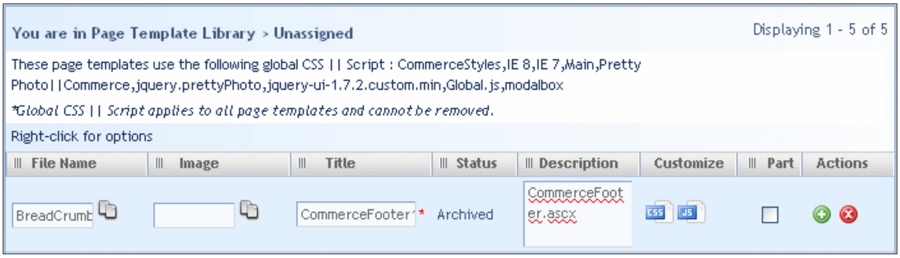
11.2.4 Editing Page Template Properties

To edit page template properties, follow these steps:

- Select **Libraries → Page Templates** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Page Templates*** tab active.
- Right-click the name of an existing template and select **Edit Properties.**



The properties fields for the selected page template become editable:



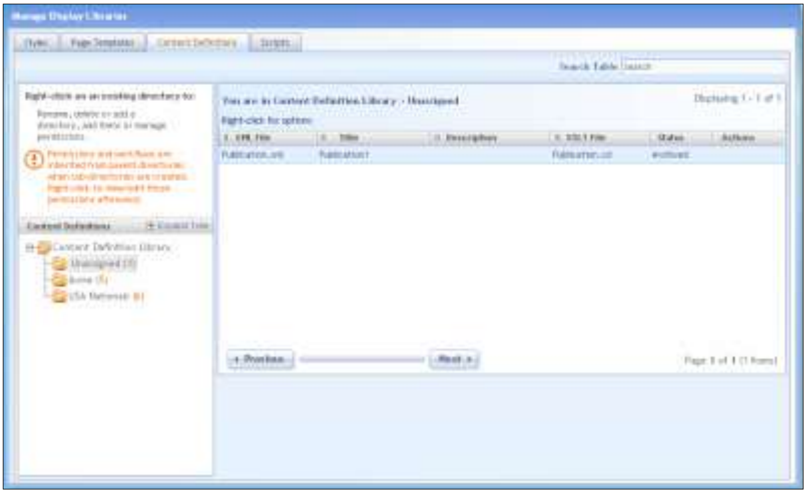
- Edit this page templates' properties as described in the *Adding Page Templates* section of this Guide.
- Click  under Actions to save changes to the page template record.

11.3 Managing Content Definitions Library Contents

A Content Definition template is an XML form that enables users to enter content in a specific pre-defined format. To manage the Content Definitions Library, you perform the following tasks:

- Add a content definition template
- Edit properties of a content definition template
- Archive a content definition template

To manage the Content Definitions Library, select **Libraries → Content Definitions** from the main navigation menu at the top Content Manager, or if you are already on the **Manage Display Libraries** container click the ***Content Definitions*** tab.



The ***Content Definitions*** tab displays the following:

- The Content Definitions Library directory tree structure on the left
- A list of content definition files in the selected directory on the right

The Content Definitions library displays the following information about each file:

Content Definitions Field	Description
XML File	Name of physical .XML file associated with this content definition.

Title	Name of content definition file in CMS.
Description	Brief explanation of the contents or use of this content definition.
XSLT File	XSL Transformation (XSLT) file used with this XML file.
Status	Active or Archived. Active content definition file can be selected for use in a page. Archived content definition file exists in the library but cannot be selected for use in a page.

11.3.1 Adding a Content Definition Template

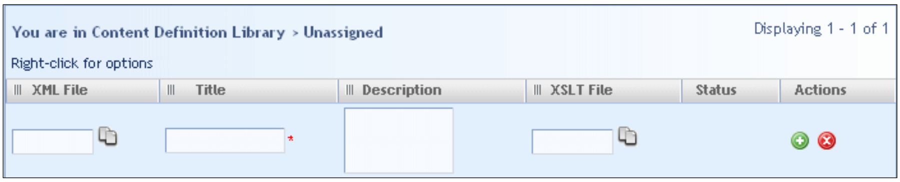
Only users with the Content Administrator role can add a content definition template. To add a content definition template, follow these steps:

- Select **Libraries → Content Definitions** from the main navigation menu.

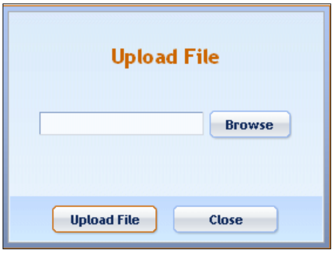
  The **Manage Display Libraries** container appears with the Content Definitions tab active.

- Right-click the name of the content definitions template and select **Add Content Definition**.

A new content definition template record appears in the content definition template list with editable fields:



- Enter template information as described in the following table:

Content Definition Field	Description
XML File	To add an XML file for this content definition template, click . An Upload File dialog appears.  • Click Browse. • Locate and select the XML file associated with this content definitions template. • Click Open. The name of the selected file appears in the Upload File dialog. • Click Upload File. The name of the selected file appears in the *XML File* field.
Title	Enter a title for this content definitions template.
Description	Enter a brief explanation of the contents or use of this content definition template.
XSLT File	To add an XSL Transformation (XSLT) file for the content definition XML file, click . An Upload File dialog appears. • Click Browse. • Locate and select the XSLT file associated with this content definitions template XML file. • Click Open. The name of the selected file appears in the Upload File dialog. • - Click Upload File. The name of the selected file appears in the *XSLT File* field.

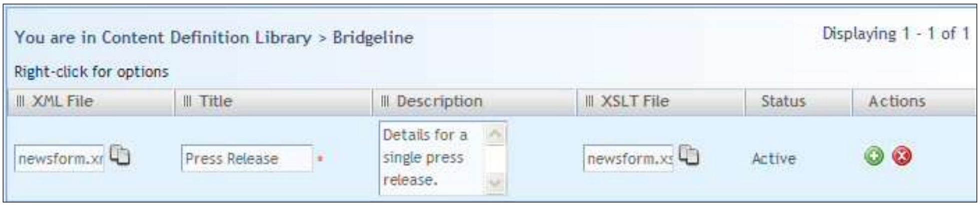
Click under Actions to Save.

The new content definition template appears in the template list.

11.3.2 Editing Properties of a Content Definition Template

Select **Libraries → Content Definitions** from the main navigation menu. Right-click the name of the content definitions template and select Edit Properties.

The fields for the selected content definition template become editable:



Edit template information as described in *Adding a Content Definition Template*.

Click  under Actions to Save.

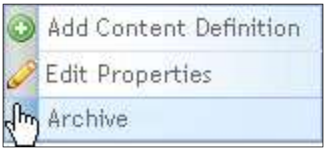
11.3.3 Archiving / Making Active a Content Definition Template

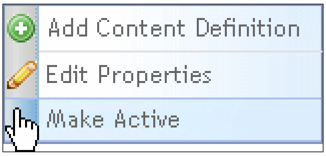
Only users with the Content Administrator role can archive a content definition template.

Content Manager does not delete an archived content definition template, but makes it unavailable by moving it to an archived folder.

To archive/make active a content definition template, follow these steps:

- Select **Libraries → Content Definitions** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Content Definitions*** tab active.
- Right-click the name of a content definitions template and select: **Archive** or **Make Active** as appropriate.





Content Manager changes the status it displays for the content definition file in the content definition library list and either:

- Moves an archived file to the archived folder
- Removes an active file from the archived folder.

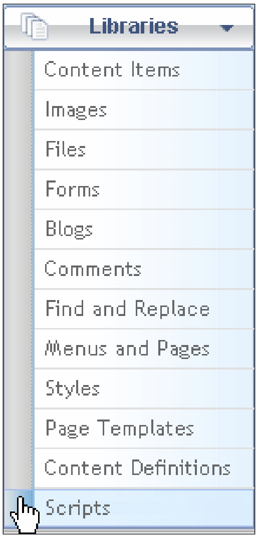
11.4 Managing Scripts Library

The script library stores and manages java scripts that you can use on page templates.

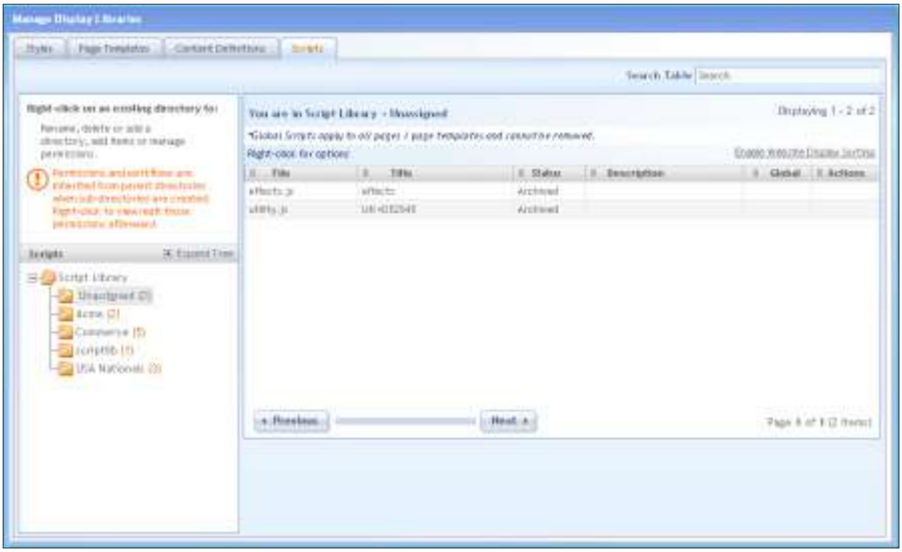
In managing the Scripts Library, you perform the following tasks:

- Add a script
- Archive/Make active
- Edit properties
- View script source
- View pages using script

To manage the Scripts Library, select **Libraries → Scripts** from the main navigation menu at the top Content Manager, or if you are already in the **Manage Display Libraries** container click the ***Scripts*** tab.



The **Manage Display Libraries** container appears with the Scripts tab active.



The ***Scripts*** tab displays the following:

- The Script Library directory tree structure on the left
- A list of scripts in the selected directory on the right

The Scripts Library displays the following information about each file:

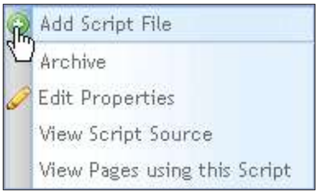
Scripts Library Field	Description
File	Name of physical .js file.
Title	Name of script in CMS.
Status	Active or Archived.
Description	Brief explanation of the contents of the script file or its use.
Global	Specifies whether script applies to all pages/page templates.

11.4.1 Adding a Script File

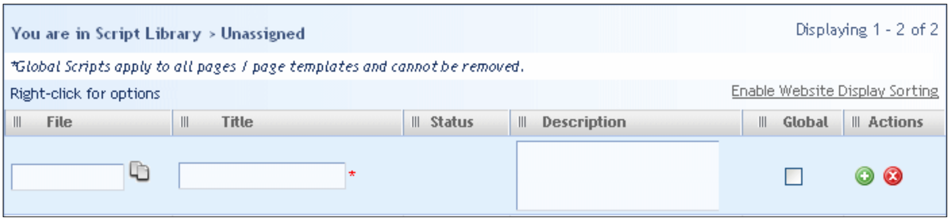
To add a script file, follow these steps:

- Select **Libraries → Scripts** from the main navigation menu.
  The **Manage Display Libraries** container appears with the Scripts tab active.

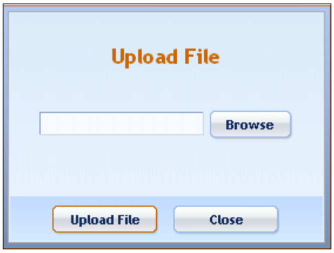
- Right-click the name of a script and select Add Script File.

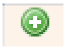


A new script file record appears in the script list with editable fields:



Enter script information as described in the following table:

Scripts Library Field	Description
File	To add a .js file for this script, click . An Upload File dialog appears.  • Click Browse. • Locate and select the .js file that contains this script. • Click Open. The name of the selected file appears in the Upload File dialog. • Click Upload File. The name of the selected file appears in the *File* field.
Title	Enter a name for this script in CMS.
Description	Enter a brief explanation of the contents of the script file or its use.
Global	Click the check box to indicate that this script applies globally, to all pages/page templates.

Click  under Actions to Save.

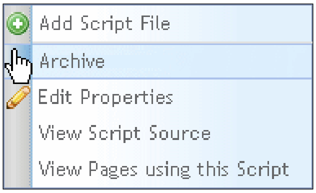
CMS adds the new script record to the Script library.

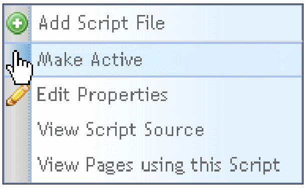
11.4.2 Archiving / Making Active a Script File

Content Manager does not delete an archived script file, but makes it unavailable by moving it to an archived folder.

To archive/make active a script file, follow these steps:

- Select **Libraries → Scripts** from the main navigation menu.
  The **Manage Display Libraries** container appears with the Scripts tab active.
- Right-click the name of a script template and select Archive or Make Active as appropriate.





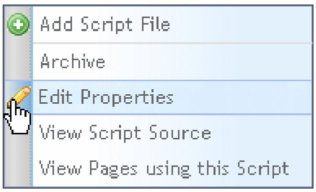
Content Manager changes the status it displays for the script file in the script library list and either

  - Moves an archived file to the archived folder
  - Removes an activated file from the archived folder.

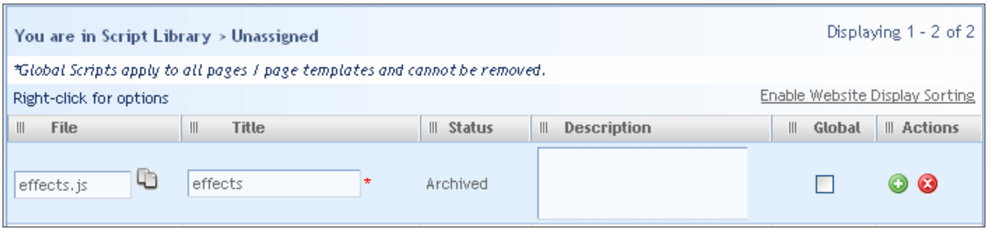
11.4.3 Editing Script File Properties

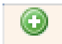
To edit the properties of a script file, follow these steps:

- Select **Libraries → Scripts** from the main navigation menu.
  The **Manage Display Libraries** container appears with the ***Scripts*** tab active.
- Right-click the name of the script file to edit and select **Edit Properties**.



The fields for the selected script become editable:

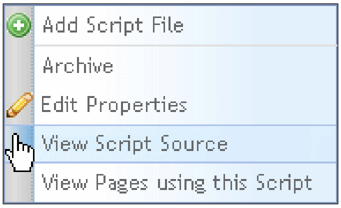


- Edit script information as described in the *Adding a Script File* section of this Guide.
- Click  under Actions to Save.

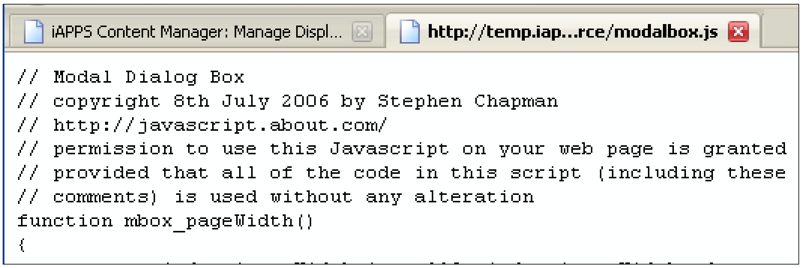
11.4.4 Viewing a Script Source File

You can view the content of a .js file associated with a CMS script. To view a .js source file, follow these steps:

- Select **Libraries → Scripts** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Scripts*** tab active.
- Right-click on an existing script file in the Script library list and select **View CSS Source**.



Content Manager opens a new window or tab in your Internet browser and displays the content of the selected .js file:

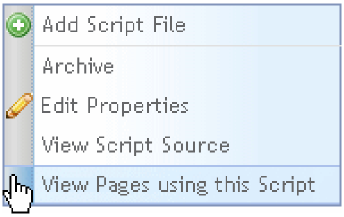


View CSS source file, then close the browser tab or window when you finish.

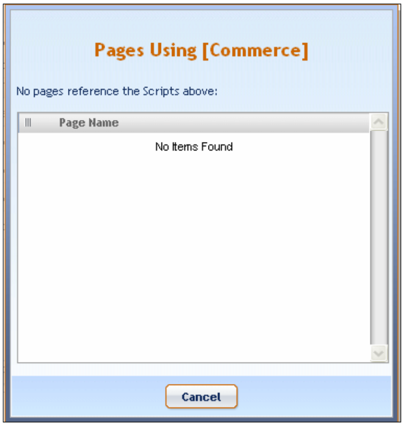
11.4.5 Viewing Pages Using This Script

Only users with the Content Administrator role can view the pages that use a specific template. To view pages that use a script, follow these steps:

- Select **Libraries → Scripts** from the main navigation menu. The **Manage Display Libraries** container appears with the ***Scripts*** tab active.
- Right-click the name of an existing script and select View Pages using this Script.



- A dialog appears displaying either:
  - No pages use the selected script
  - List of the pages that use the selected script.



- Click the “Cancel” button to close dialog.

11.5 Managing Directories of Display Libraries

Content Manager provides a default directory tree structure in which you store and organize your display library contents. The default structure includes:

- The directory tree root, named after the library type, (Style Library, Page Template Library, Content Definition Library, Script Library)
- A single sub-directory below the root named Unassigned, in which Content Manager stores files from deleted directories

You can add sub-directories to organize display libraries directory structures:

- Below the root
- Below other sub-directories

You manage the directories of the Display Libraries (Styles, Page Templates, Content Definitions, and Scripts) by:

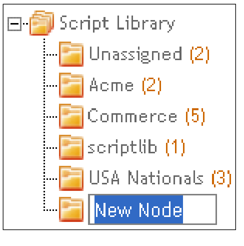
- Adding sub-directory under root directory
- Adding sub-directory under a sub-directory
- Renaming a directory
- Deleting a directory

11.5.1 Adding Sub-Directory from Root

You can add a directory off of the library root directory (Style Library, Page Template Library, Content Definition Library, and Script Library).

- Right-click on the display library root and select **Add Directory.**

A new node appears at the end of the directory tree level directly below root:



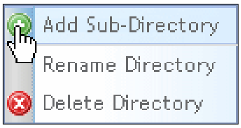
- Enter a name for the directory and press the Enter key to save. The new directory appears at the bottom of the directory tree.

11.5.2 Adding Sub-Directory from Sub-Directory

You can add a sub-directory at any level of the directory tree hierarchy.

Use this procedure to create a sub-directory at any level except the level directly below root.

- Right-click the directory to which you want to add a sub-directory and select Add Sub-Directory.



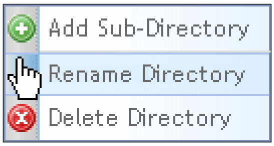
A new node appears under the selected sub-directory.

- Enter a name for this directory and press the Enter key to save. A new sub-directory appears in the directory tree.

11.5.3 Renaming a Directory

To rename a directory, follow these steps:

- Right-click the directory to rename and select **Rename Directory**.



The directory name becomes editable.

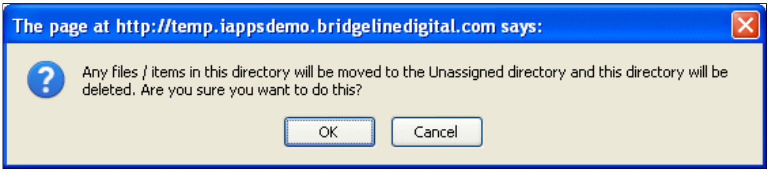
- Edit the directory name and press the Enter key to save.

11.5.4 Deleting a Directory

To delete a directory, follow these steps:

- Right-click the directory to delete and select **Delete Directory**.

A confirmation dialog appears indicating that CMS will move any files in this directory to the Unassigned directory:



- Click the “OK” button to delete the directory. Content Manager moves any files in the selected directory to the Unassigned directory and deletes the selected directory.

12 MANAGING INDEX TERMS

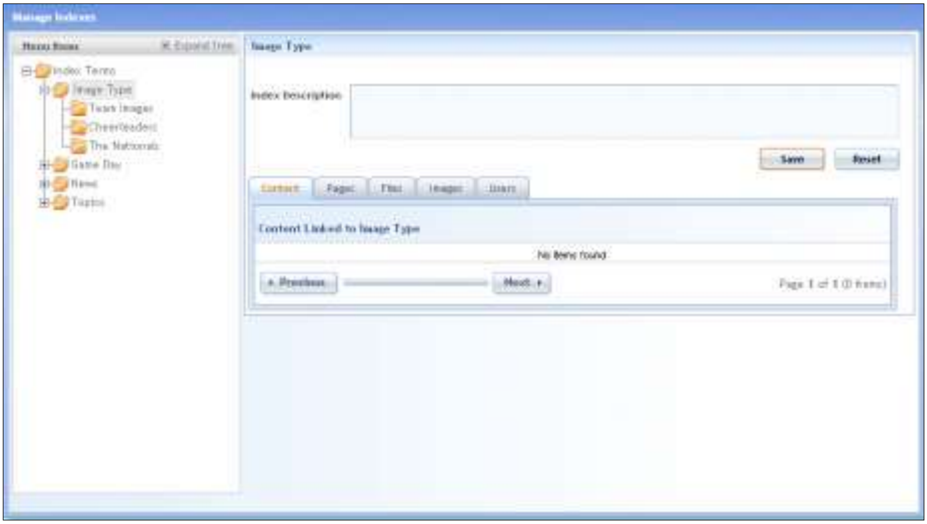
This chapter contains step-by-step instructions on how to manage Index Terms.

To manage indexes, you can perform the following tasks:

- Add an index sub-term
- Delete an index term
- Rename an index term

To manage indexes, you first select **Administration → Index** from the main navigation menu.

The Manage Indexes page appears:



The Manage Indexes page displays:

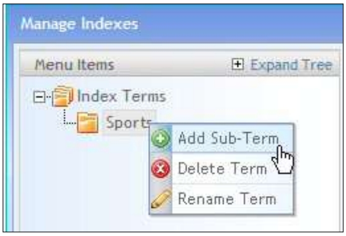
- Menu Items – the Index term tree structure.
- A description of the selected term.
- Any content in each of the Data Libraries or users in the users database assigned to this index term.

12.1 Adding an Index Sub-term

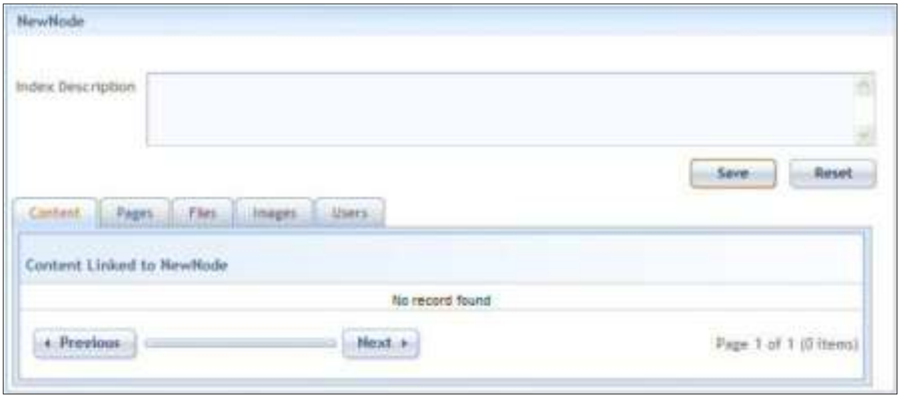
To add a sub-term to an index term, follow these steps:

- Select **Administration → Index** from the main navigation menu.
- Right-click the index term to which you want to add a sub-term and select Add Sub-Term.

  A New Node appears:



- Enter a name for the new sub-term and press the Enter key to save.
- Enter a brief description of the purpose or use of this sub-term in the Index Description text box.



Click the "Save" button.

12.2 Deleting an Index Term

Only users with the Content Administrator role can delete a term.

To delete an index term, follow these steps:

- Select **Administration → Index** from the main navigation menu.
- Right-click the index term and select **Delete Term.**

A dialog appears prompting you to confirm that you want to delete the selected term and its sub-terms:

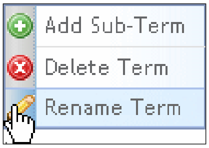
- Click the "OK" button.

The deleted term no longer appears in the index term tree structure.

12.3 Renaming an Index Term

To rename a term, follow these steps:

- Select **Administration → Index** from the main navigation menu.
- Right-click the index term and select **Rename Term**.



The term name becomes editable:

- Edit the name of the index term and press the Enter key to save.

Part III: Site and User Management Tasks

Part III of this guide explains how to perform site and user management tasks in iAPPS Content Manager.

These tasks include:

- Managing sites
- Managing groups
- Managing Content Management System (CMS) users
- Managing website users
- Configuring security levels

> Your user role determines whether you can perform site and user management tasks.

13 MANAGING CMS USERS AND GROUPS

This chapter contains step-by-step instructions on how to manage CMS groups and users. Only Administrators can manage users and groups. Below is a table of which administrators can perform which tasks:

Tasks	Content Administrator	Site Administrator	Installation Administrator
Manage CMS Groups:			
Add a new CMS group		✓	
Modify or delete a CMS group	✓	✓	
View and edit CMS group permissions	✓		
Edit Group Page or Menu Access	✓		
Deactivate/Activate CMS group	✓	✓	
Manage CMS Users:			
Add a new CMS user		✓	✓
Modify or delete a CMS user	✓	✓	✓
Deactivate/activate a CMS user	✓	✓	✓
View/Edit CMS user permissions	✓	✓	✓
Edit User Page or Menu Access	✓		

13.1 Managing CMS Groups

CMS groups help you quickly divide up work on your site.

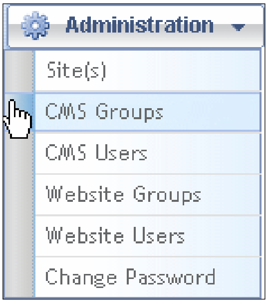
Groups are an important part of Workflows. For example, you could set up a group of Authors to create content and a Reviewers group to review content for publication.

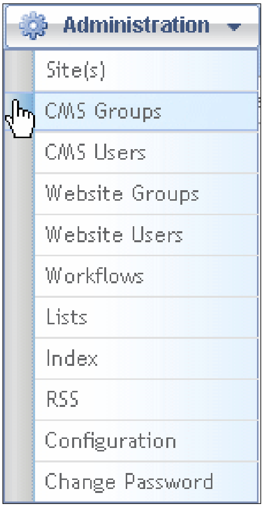
Groups are also helpful in managing permissions. Instead of setting menu or page access permissions for every user, you can create groups and then assign users to them. The users will share the access and permissions of the group. For example, if you wanted members of your research department to only be able to edit pages on research, you could create a Research Group and assign it permission to edit only the pages relevant to the department. Then you can simply assign users to the group instead of having to limit all the department's users individually.

Groups are especially helpful when members might leave or join a department. If someone moves from a department with limited access, you can simply add or delete them from a group.

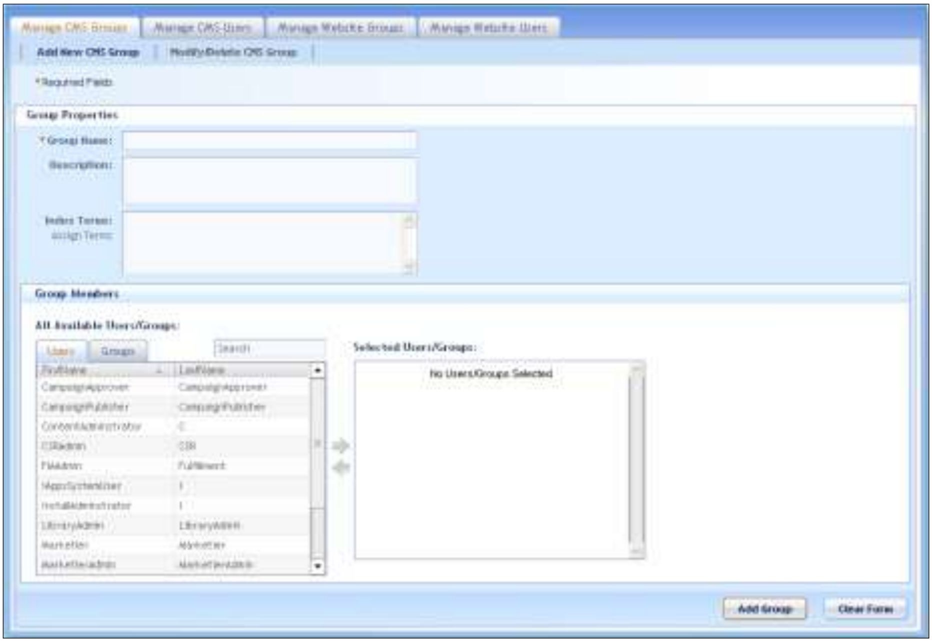
Remember only a Site Administrator can create groups, although Content Administrators can manage them afterward.

To manage groups, you select **Administration → CMS Groups** from the main navigation menu.





The **User Administration** page appears with the ***Manage CMS Groups*** tab active.



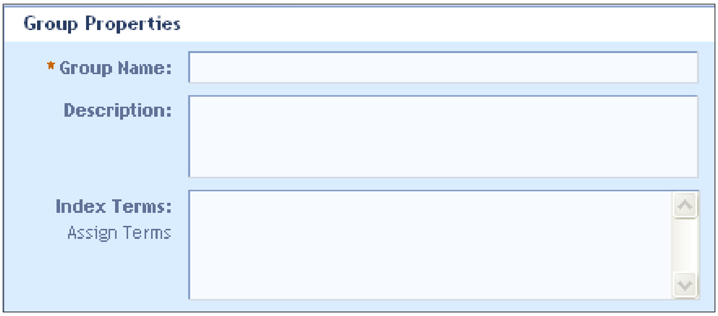
The ***Manage CMS Groups*** tab contains two sub-tabs, which vary depending on your role:

- *Add New CMS Group* (active by default) (only for Site Admins)
- *Modify/Delete CMS Group*
- *View/Edit CMS Group Permissions*

13.1.1 Adding a New CMS Group

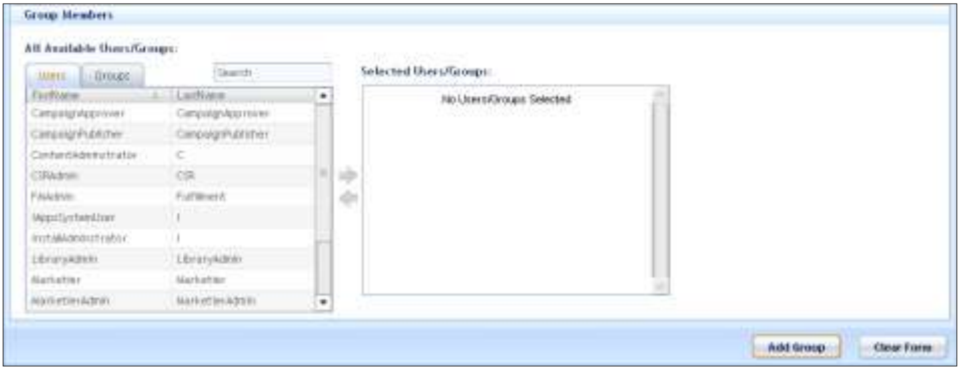
To add a new CMS group:

- Click the ***Add New CMS Group*** tab. This will open a “Group Properties” pop-up:



- Enter the properties of this group as described in the following table:

CMS Group Property	Description
Group Name	Name of group.
Description	Brief description of purpose or content of this group.
Index Terms: Assign Terms	- Click the Assign Terms link to specify index terms for this group. The Assign Index Terms dialog appears. - Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder. - Click the **Save Index Terms** button.



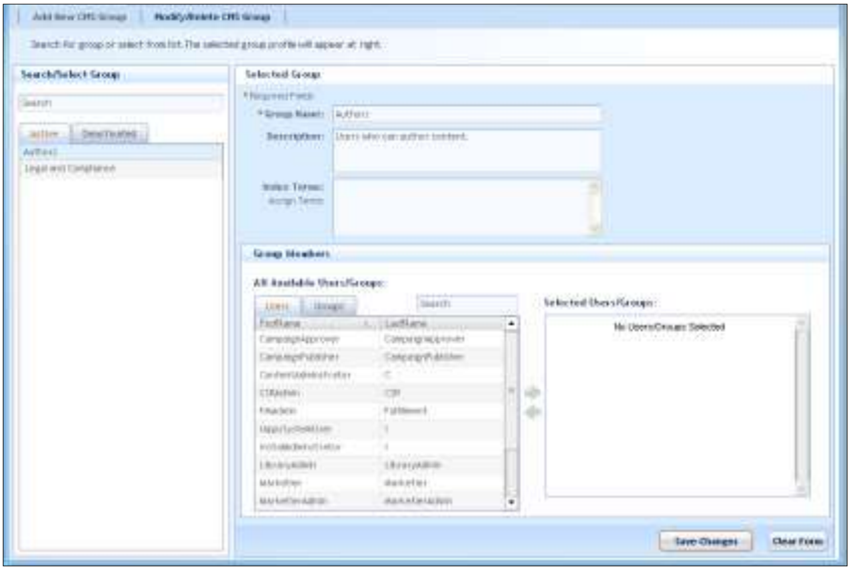
Add Members to this group as follows:

- Click on the Users or Groups tab to add users or groups to this new group.

- Click on a user or group name in the appropriate list and click to add to the Selected Users/Groups list.

Optionally, to remove a user or group from the Selected Users/Groups list, click on a user or group name in the Selected Users/Groups list and click .

- Click the “Add Group” button at the bottom of the screen. The ***Modify/Delete CMS Groups*** tab becomes active. The new group appears in the ***Search/Select Group*** pane.



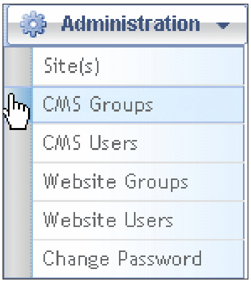
You can set the permissions for the group with the *View/Edit CMS Groups permissions* sub-tab. See Viewing CMS User Permissions.

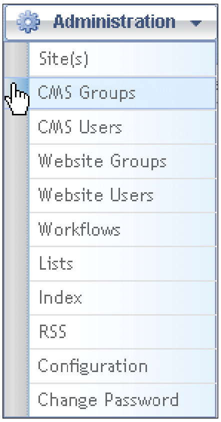
13.1.2 Modifying / Deleting a CMS Group

You can modify or delete a CMS group from the ***Modify/Delete CMS Groups*** tab.

To modify or delete CMS groups, follow these steps:

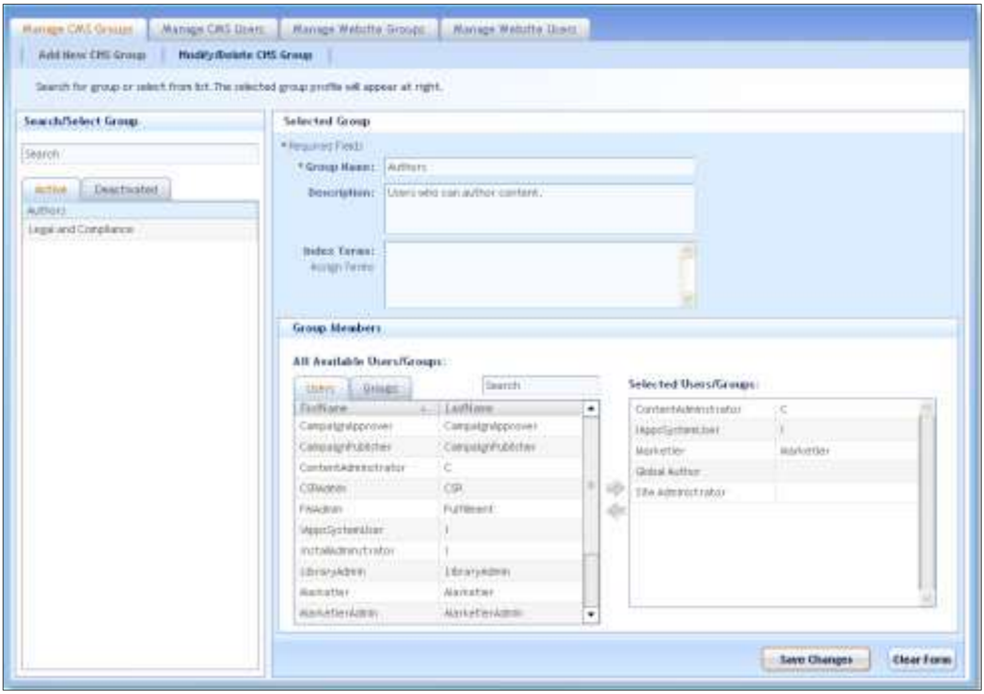
- Select **Administration →CMS Groups** from the main navigation menu.





The **User Administration** page appears with the ***Manage CMS Groups*** tab active.

- Click the *Modify/Delete CMS Group* sub-tab.



The ***Modify/Delete CMS Group*** page displays the following panes:

Manage CMS Group Column	Displays
Search/Select Group	List of the existing CMS groups. You can search or browse the list.
Selected Group	Properties of selected CMS Group.
Group Members	Members of the selected CMS group.

13.1.2.1 Modifying a CMS Group

You can later edit a CMS group's properties and group membership.

- Click the ***Modify/Delete CMS Groups*** tab.
- Locate a CMS Group by searching or scrolling the list.
  The *Modify/Delete CMS Group* pane displays information about the selected CMS group.
- Edit the CMS group as described in the *Adding a CMS Group* section of this guide.
- Click the "Save Changes" button.

13.1.2.2 Deleting / Deactivating / Activating a CMS Group

You can deactivate a group so that it remains in the CMS Groups database but cannot be used; alternatively, you can delete the group entirely.

> ⓘ Deactivating or deleting a group disassociates all the workflow responsibilities and permissions for that group. Before deactivating, you must reassign the workflow responsibilities and permissions.

To deactivate/activate a CMS Group, follow these steps:

- Click the *Modify/Delete CMS Groups* tab. The **Modify/Delete CMS Group** container appears. Click ***Active*** or ***Deactivated*** tab as appropriate.
- Locate a CMS Group by entering a group name in the Search field or Scroll through the list of groups.
  The Modify/Delete CMS Group pane displays information about the selected CMS group.
- Right-click the name of the CMS group whose status you want to change and select **Delete Group, Deactivate Group** or **Activate Group**

A dialog box appears prompting you to confirm this action: Click “OK”.

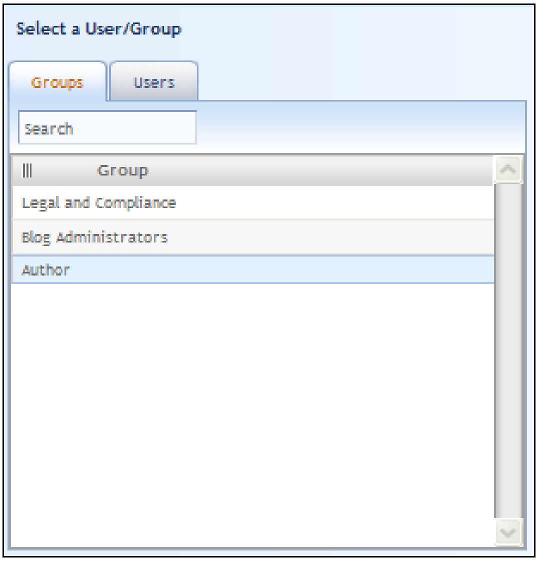
Deactivate or Activated CMS groups appear in the appropriate tab according to their current status. A deleted CMS group no longer appears in the Search/Select Group list.

13.1.3 Viewing / Editing CMS Group Permissions

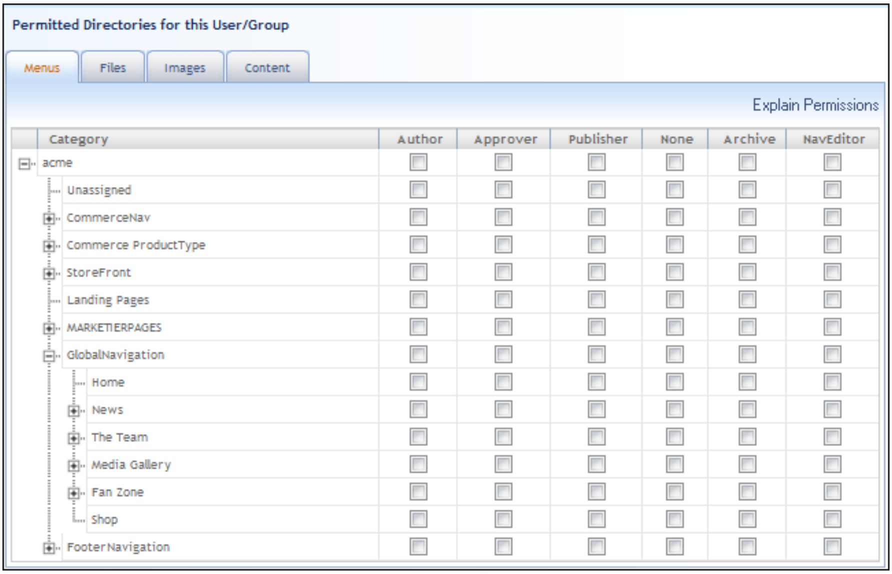
Only Content Administrators can edit CMS Group Permissions at the menu node or library level.

Follow these steps:

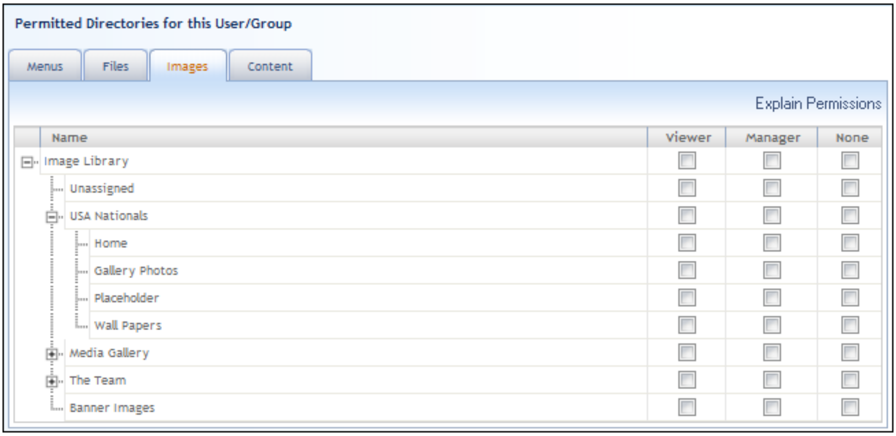
- Click the *View/Edit CMS Group* permissions subtab in the ***Manage CMS Groups*** tab to display permissions information.



- Locate a group by searching or scrolling through the list.
- Once highlighted, permissions for the menu structure and sections for the selected group appears.



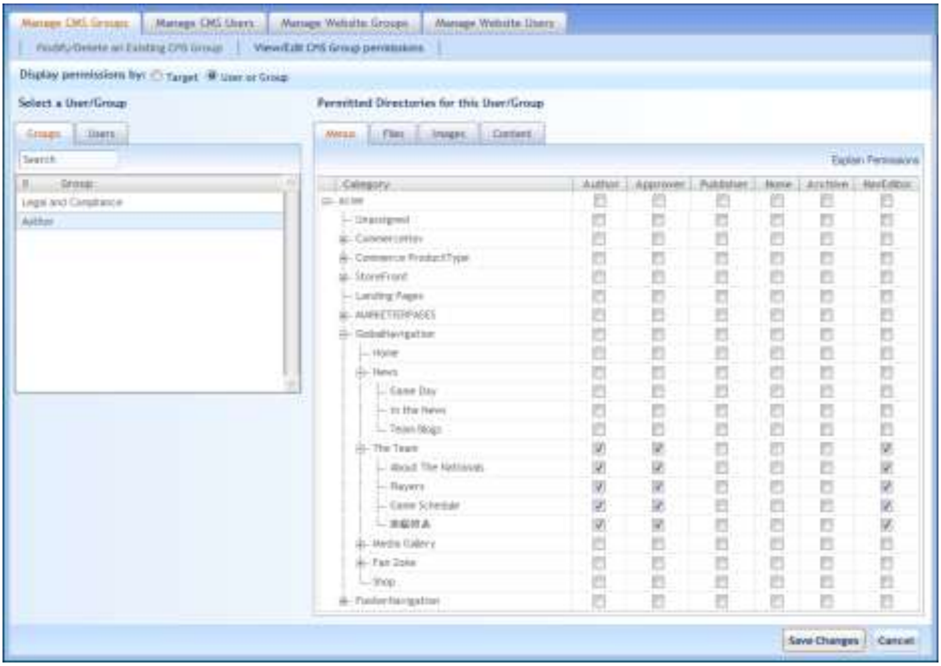
- If you want to assign permissions for file, image or content libraries, click on those tabs to display additional roles.



To edit permissions:

- Click + to the left of a directory tree to expand it and view permissions for all directories in that tree.

- To assign or un-assign permissions to all of the directories in a tree, click the checkboxes in the first displayed row. A dialog appears, prompting you to specify whether to propagate this permission to all levels below. Click the “OK” button to propagate or the **Cancel** button to not.
- To assign or un-assign permissions to an individual directory in a tree, locate that directory and click the checkbox beside it. A dialog appears, prompting you to specify whether to propagate this permission to all levels below. Click the “OK” button to propagate or the **Cancel** button to not.
- Checking the NavEditor Column will give the group permission to edit the navigational structure (move, delete or rename items) for the whole site or just an individual menu node, if desired.
- To quickly clear all permissions in a row, click the “None” Column. (Note: the check will disappear after you save.)



- Click the “Save Changes” button.

13.2 Managing CMS Users

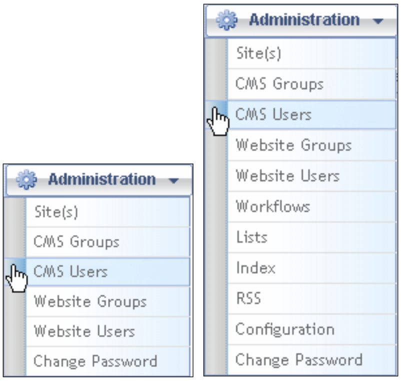
This section contains step-by-step instructions on how to manage CMS users. Only Install or Site Administrators can create CMS users. Content or Site Administrators can also perform the following tasks:

- Modify an existing CMS User
- Delete an existing CMS User
- View CMS User permissions

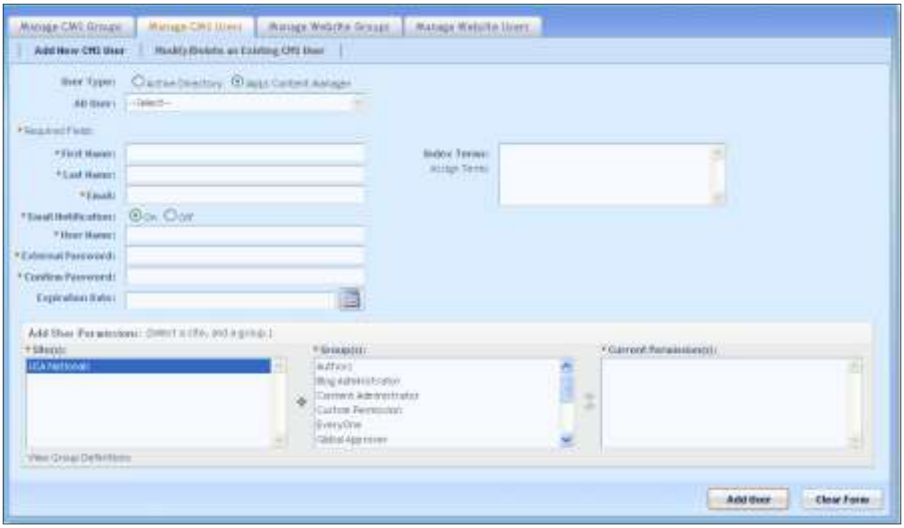
ⓘ An administrator can only modify a user who has equal or lower permissions to them. For example, if Bob has site administrator and content administrator privileges, he can modify settings for Keesha, who is a Content administrator. Both Bob and Keesha can modify settings for Sumit, who is an Author. But Keesha will not be able to modify Bob's settings because he is both a Site and a Content Administrator, and she has only Content Admin privileges. Nor will Bob be able to modify settings for Jill, the Installation Administrator.

To manage CMS Users,

- Select **Administration → CMS Users** from the main navigation menu.



The **User Administration** container appears with the ***Manage CMS Users*** tab active:



The ***Manage CMS Users*** tab contains two sub-tabs, which vary depending on your role:

- *Add New CMS User* (active by default) (only for Site and Installation Admins)
- *Modify/Delete an Existing CMS User*
- *View/Edit CMS User Permissions*

13.2.1 Adding a New CMS User

> ⓘ Only users with the Installation Administrator or Site Administrator role can add a new CMS user.

Click the Add New CMS User tab, if not already selected.

Enter CMS user information as described in the following table:

User Information Field	Description
User Type	Click the radio button for Active Directory or IAPPS Content Manager depending upon where the user information is stored.
AD User	If Active Directory selected as User Type, click the arrow in the pick-list to select .
First Name	First name of user.
Last Name	Last name of user.
Email	User's email address.
Email Notification	Click the checkbox beside on or off to select whether this user receives email notification.
User Name	Enter a login name of at least five characters in length for this user.
External Password	Enter the password user must enter to access iAPPS.
Confirm Password	Enter the password user must enter to access iAPPS again to confirm.
Expiration Date	Click the calendar icon to select a date on which this user's access to iAPPS expires.
Index Terms: Assign Terms	Click the Assign Terms link to specify index terms for this user. The Assign Index Terms dialog appears. Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder. Click the "Save Index Terms" button.

- Specify permissions for this user as follows:
- Click on the name of a site which this user can access.
    - Click to select a single (or Ctrl-Click to select multiple) group whose permissions you want to assign to this user. Click either or the **Add Permissions** button to add group(s) to the Current Permission(s) list.
    - Optionally, to remove a group or role from the Current Permission(s) list, click on a group name in the Current Permission(s) list and click either or the **Delete Permissions** button.
- Click the **Add User** button.
- The ***Modify/Delete User*** tab appears with the new user selected.

13.2.1.1 Adding a User via the Control Center.

If you have permissions, you can also add a new CMS user from the **Control Center**.

Simply enter user information in the **Add a User** container as described in the table above:

- Click the **Add User** button.

  An added user confirmation dialog box appears.
- Click the “OK” button.

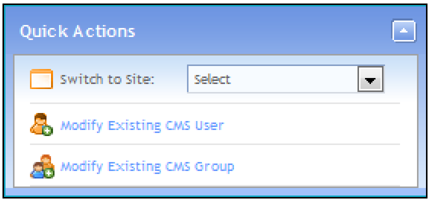
To view or edit the user information, select **Administration → CMS Users → Modify/Delete an Existing CMS User**.

13.2.2 Modifying / Deleting an Existing CMS User

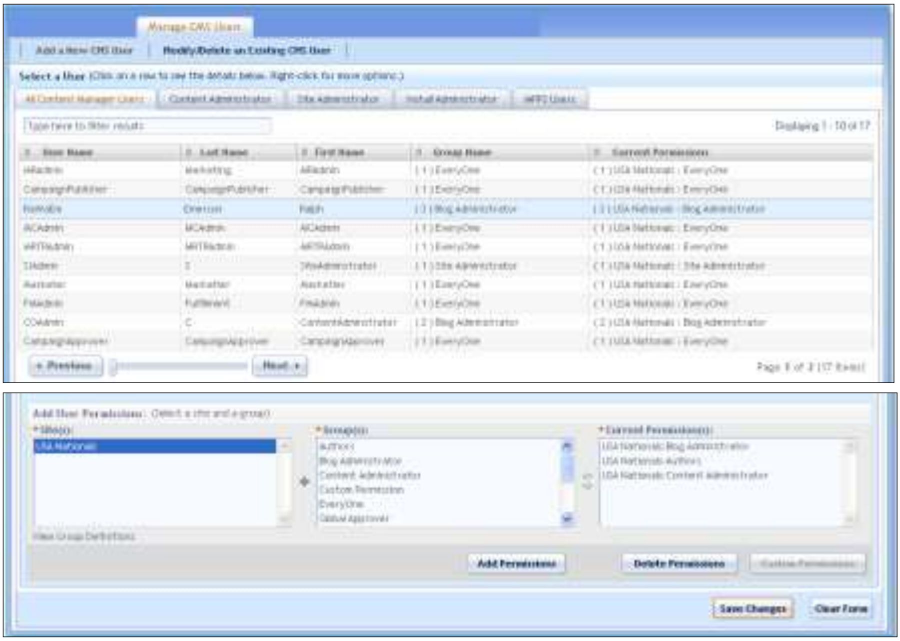
ⓘ Administrators can only modify the permissions of users with equal or lower levels of administrative permissions. For example, a Content Administrator cannot modify another Content Administrator who is also a Site Administrator.

To access Modify/Delete an Existing CMS User, follow these steps:

- Select **Administration →CMS Users** from the main menu.
  The User Administration page appears with the ***Manage CMS Users*** tab active.
- You can also reach here through the **Control Center Quick Actions** Container.



- Click the ***Modify/Delete an Existing CMS User*** subtab.



The ***Modify/Delete an Existing CMS User*** tab displays the following panes:

Modify/Delete CMS User Pane	Displays
Select a User	Tabs for the various categories of users and a list of the existing CMS users of that type on each tab. Search field to find the users listed on any tab for the specified criteria.
Selected User	Information about the selected user.
Permissions	Current permissions for the selected user.

13.2.2.1 Modifying an Existing CMS User

To modify an existing CMS user:

- Click the ***Modify/Delete an Existing CMS User*** tab.
- Locate a CMS user by entering their name in the search field or scrolling through the list of users.
- Edit the CMS user information as described in the *Adding a CMS User* section of this guide.
- Click the “Save Changes” button. If you want to change their permissions see the Viewing/Editing Permissions section below.

13.2.2.2 Deleting an Existing CMS User

Only users with the Installation Administrator or Site Administrator role can delete an existing CMS user.

ⓘ Note: If you are deleting a user, ensure that any workflow responsibilities tied to their individual username have been transferred to other users or groups. Otherwise, workflows will not function properly. This will also be the case if they are the only user in a Group.

ⓘ You can delete a user without affecting pages they have edited or created, however.

To delete an existing CMS user, follow these steps:

- Click the ***Modify/Delete an Existing CMS User*** sub-tab. The Modify/Delete an Existing CMS User page appears
- Locate a CMS user by searching or scrolling through the list of users.
- The *Modify/Delete an Existing CMS User* pane displays information about the selected CMS user.

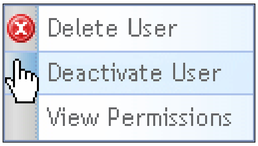
- Right-click on the CMS user in the Select a User list and choose **Delete User**.
- A dialog box appears prompting you to confirm the deletion; Click “OK”.

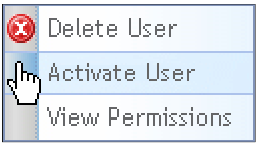
13.2.2.3 Deactivating / Activating a CMS User

ⓘ Deactivating a user disassociates that user from all groups.

To deactivate/activate a CMS user, follow these steps:

- Click the Modify/Delete an existing CMS User tab.
  The Modify/Delete an existing CMS User page appears.
- Locate a CMS user by entering their name in the search field or scrolling through the list of users.
- The Modify/Delete an existing CMS User page displays information about the selected CMS group.
- Right-click the name of the CMS user whose status you want to change and select **Deactivate User** or **Activate User**





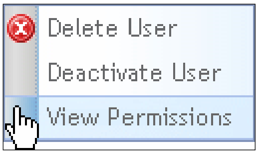
A dialog box appears prompting you to confirm this action: Click “OK”.

For a deactivated user, Group Name and Current Permission(s) columns are blank in the *Select a User* list. For an active user, Group Name and Current Permission(s) columns contain information in the *Select a User* list.

13.2.3 Viewing/Editing CMS User Permissions

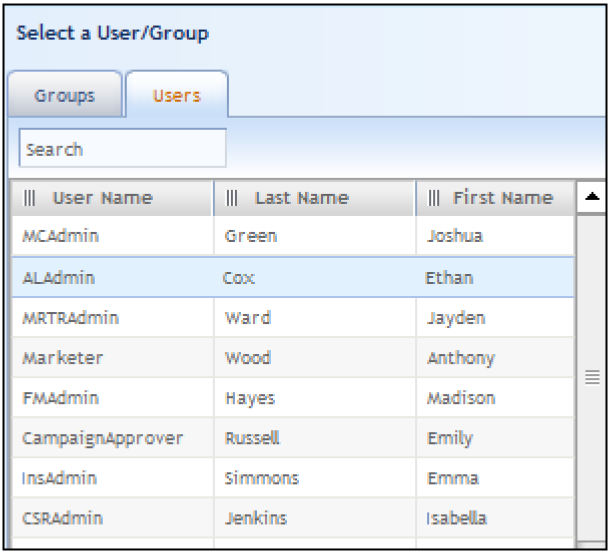
To view CMS user permissions, follow these steps:

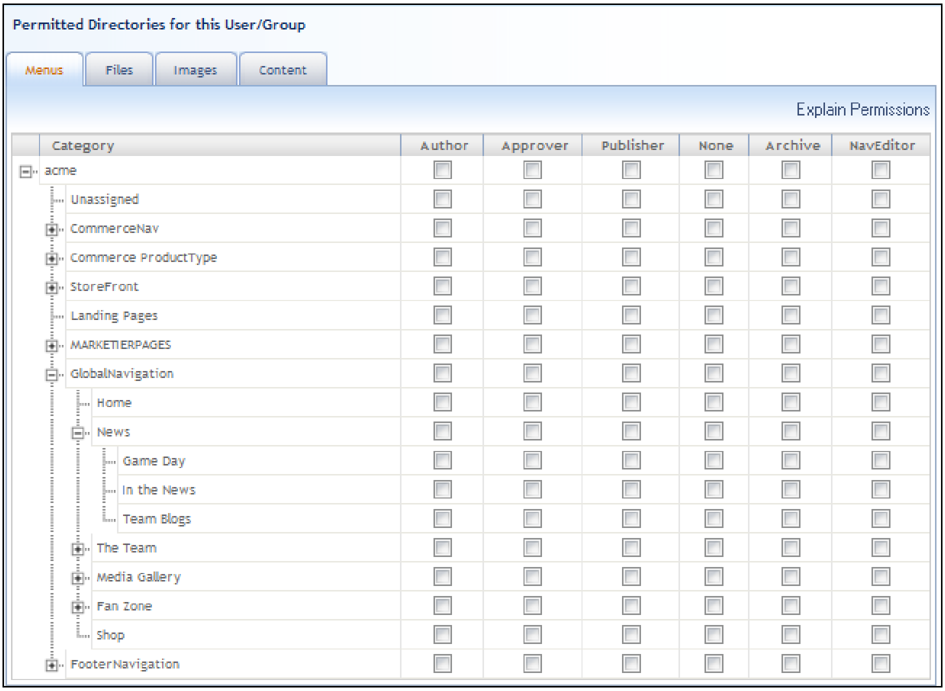
- Click the ***Modify/Delete an Existing CMS User*** tab.
  Locate a CMS user via the search field or scrolling through the list of users.
- Right-click the CMS User and select **View Permissions.**



A popup window appears, displaying the current permission(s) for the selected user:

If you want to change permissions for the user, select the users tab on the left and choose a user. His or her permissions will appear in the right-hand window.





Click on each tab to view permissions for that area (Menus, Files, Images or Content).

- Click + to the left of a directory tree to expand it and view permissions for all directories in that tree.
    - To assign or un-assign permissions to all of the directories in a tree, click the checkboxes in the first displayed row. A dialog appears, prompting you to specify whether to propagate this permission to all levels below. Click the “OK” button to propagate or the **Cancel** button to not.
    - To assign or un-assign permissions or roles to an individual directory in a tree, locate that directory and click the checkbox beside it. Click the “OK” button to propagate to levels below or the **Cancel** button to go back.
    - Checking the NavEditor Column will give the group permission to edit the navigational structure in the site or just an individual menu node, depending on your choices.
    - To quickly clear all permissions in a row, click the “None” Column. (Note: the check will disappear after you save.)
- Click the “Save Changes” button.

14 MANAGING WORKFLOWS

This chapter contains step-by-step instructions on how to manage workflows. Only administrators can set up workflows, although other roles can view them.

Workflows provide you with a review\approval process, so that you can control when new or edited content gets published to the site, and ensure the proper approvals are obtained before content appears on your site.

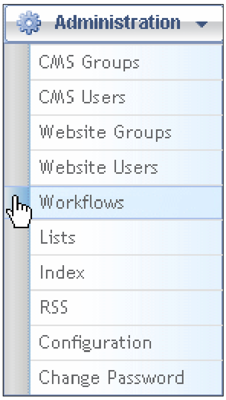
Workflows generally consist of assigning actions to roles. Typical roles include Author(s), Approver(s) and Publisher(s). Workflows require that a user who serves in the capacity of a given role to take a necessary action before the campaign moves on to the next step in the workflow.

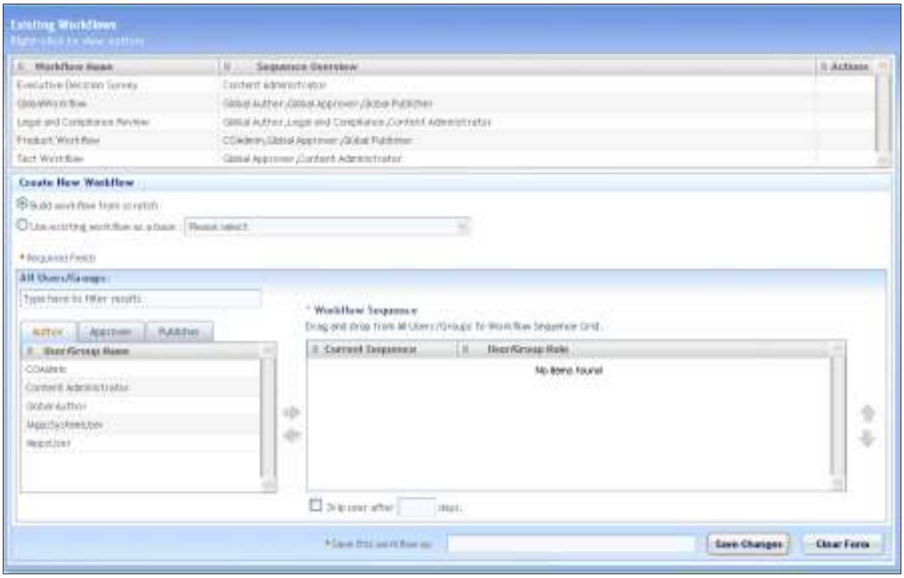
You can see a typical workflow example in the *iAPPS User Scenario Guide.*

In workflows, you can perform the following tasks:

- View a workflow
- Edit a workflow
- Assign a workflow
- Rename a workflow
- Delete a workflow
- Base a new workflow on an existing workflow
- Create a new workflow

To manage workflows, select **Administration → Workflows** from the main navigation menu:





The Manage Workflows Container displays the following information:

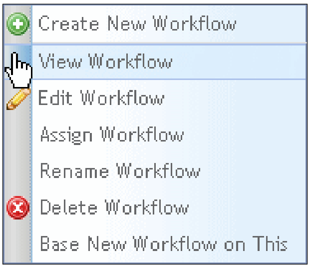
Manage Workflow Page	Displays
Existing Workflows container	Names of the existing workflows Sequence of each workflow, which specifies: the users who must act; and the sequence by which those users must act to complete this workflow.
Create New Workflow pane	Options for how to build a new workflow, from: • Scratch • An existing workflow

14.1 Viewing a Workflow

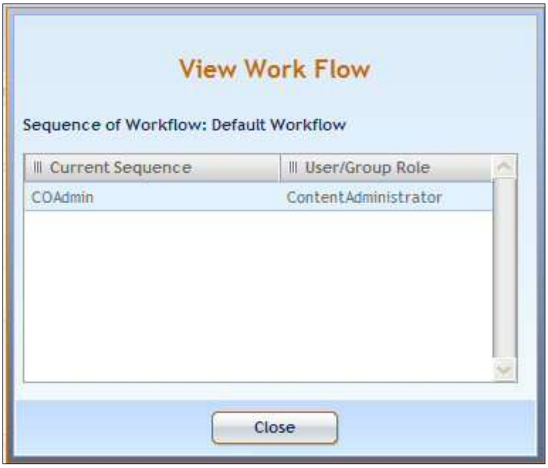
An overview of each workflow sequence appears in the **Existing Workflows** container. Use the following procedure to view greater detail of the workflow sequence.

To view a workflow, follow these steps:

- Select **Administration → Workflows** from the main navigation menu.
- Right-click a workflow name and select **View Workflow.**



A View Workflow popup window appears, displaying the workflow sequence.



- Click “Close” to exit.

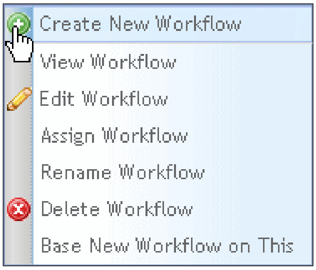
14.2 Creating a New Workflow

You can create a new workflow from: scratch or use an existing workflow as a base

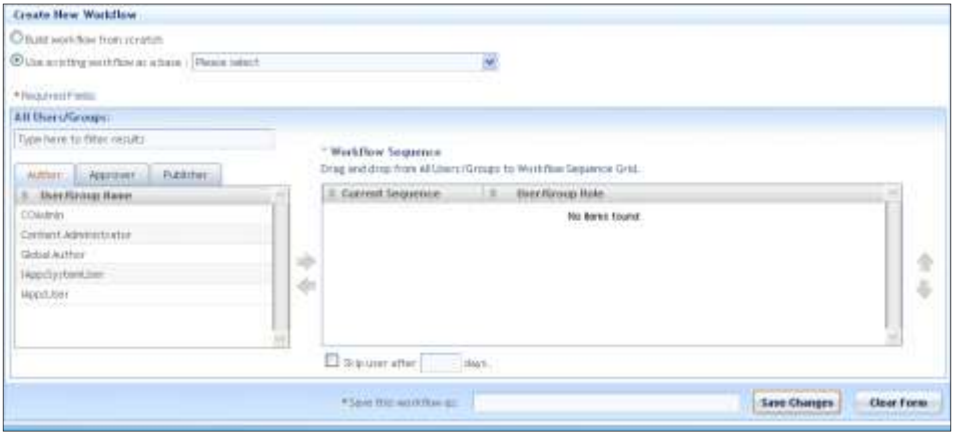
> ⓘ You can create a new workflow from an existing workflow from the Create New Workflow pane or directly from the Existing Workflows list pane by selecting **Base New Workflow on This** from the right-click context menu.

To create a new workflow: →

- Select **Administration → Workflows** from the main navigation menu.
- Right-click the name of any existing workflow in the list on the right and select **Create New Workflow.**



The Create New Workflow pane appears:



ⓘ It is a best practice to create a workflow using Groups and then assign individual users to the Groups. That way, if a user is out of the office or leaves, other users in the group can complete the workflow responsibilities. Also, you can easily add or delete individual users without remaking the entire workflow. Note: If a user is deleted or deactivated, make sure their workflow responsibilities are assigned to other users, especially if they are the only user in a group. See the iAPPS User Scenario Guide for more information.

- To create a workflow:

From Scratch	Using Existing Workflow as Base
• Click the Build workflow from scratch radio button. An empty Workflow Sequence box appears.	• Click the Using existing workflow as base radio button. • Click the arrow in the pick-list field to select the existing workflow on which to base this new one. The sequence of the selected workflow appears in the Workflow Sequence box.

- To build the workflow:

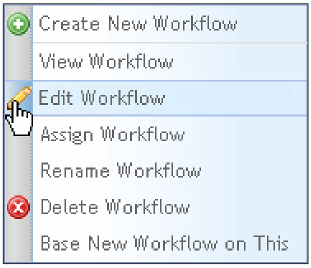
Step	**Action**
1. Click on a user role tab.	If this workflow will go through the whole sequence of authoring\editing content to publishing, select each tab in order from left to right.
2. Add or delete users to and from the sequence.	Click on a user\group name in the *User/Group Name* list and click to add the user to the workflow sequence. Click on a user\group name in the workflow sequence and click to remove from the *sequence*.
3. Re-order user sequence.	If necessary, to move a user\group up or down in the workflow sequence, click on the user\group name and then click or as appropriate.
4. Specify an expiration date (optional)	Click the *Skip Use After* check box and enter the number of days in the days field
5. Name and Save	Name the workflow in the *Save this workflow as* field. Click “Save Changes.”

> ⓘ **Note:** Once you have a created a workflow, it does not take effect until you have assigned it. See Assigning a Workflow to a Menu Item below.

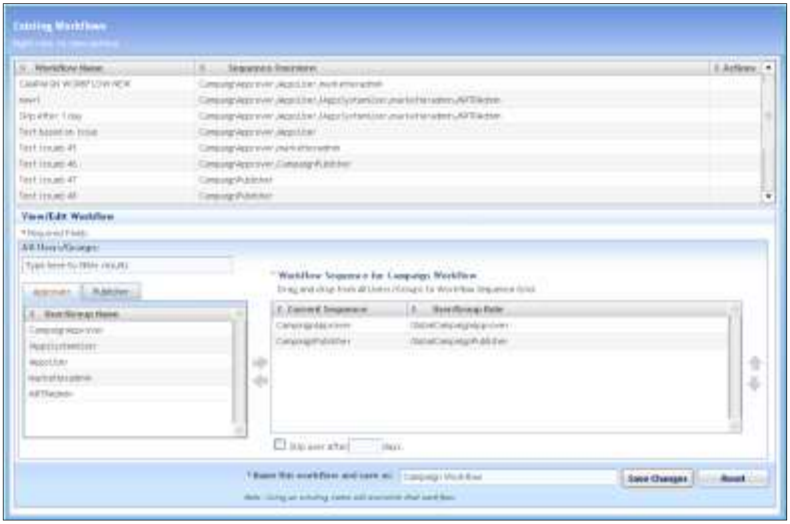
14.3 Editing a Workflow

To edit a workflow, follow these steps:

- Select **Administration → Workflows** from the main navigation menu.
- Right-click a workflow in the Existing Workflows list and select **Edit Workflow.**



The current sequence of this workflow appears in the View/Edit Workflow pane at the bottom of the page:



- Edit the workflow as described in the *Creating a New Workflow* section

To save workflow with:

The Same Name	A New Name
Click the “Save Changes” button.	Enter a new name in the *Name This Workflow* field. Click the “Save Changes” button.

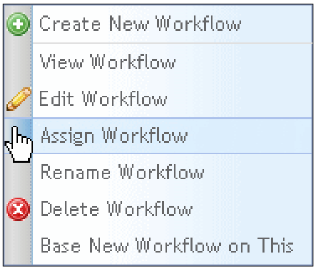
ⓘ Once you have a created a workflow, it does not take effect until you have assigned it.

14.4 Assigning a Workflow to a Menu Item

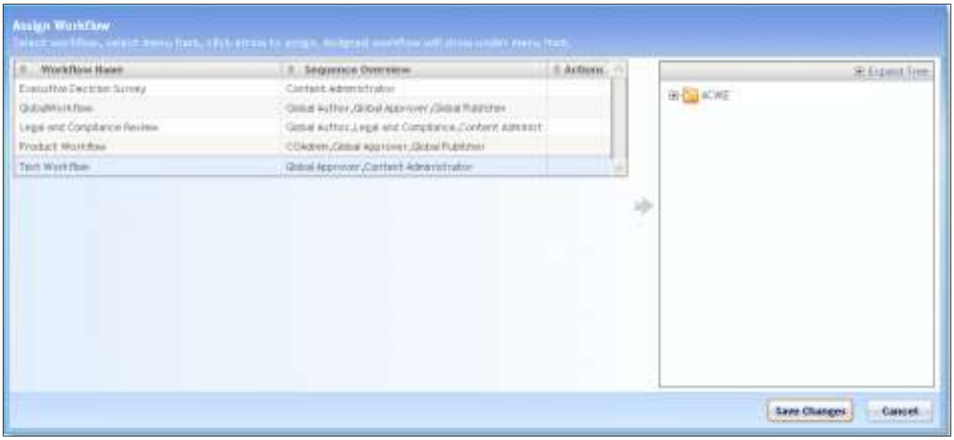
After creating a workflow, to put it into use in the site development process, you must assign it to a menu item.

To assign a workflow, follow these steps:

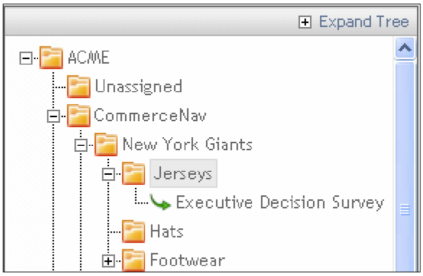
- Select **Administration → Workflows** from the main navigation menu. Right-click the workflow to assign and select **Assign Workflow.**



The **Assign Workflow** container appears:



- Select a menu to assign to a workflow:
  - Click + to the left of the menu tree or + Expand tree to expand the menu tree.
  - Locate the menu in the tree and click on it to select.
- Click to assign the selected workflow to the selected menu. Or select a different workflow from the workflow list and click .
  The workflow appears under the menu in the menu tree:

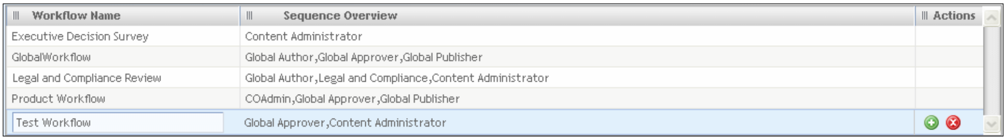


- Click the “Save Changes” button. A workflow assigned successfully message appears at the top of the page,
- To close the Assign Workflow page, click the “Cancel” button.
  A dialog box appears prompting you to confirm canceling.
- Click the “OK” button.

14.5 Renaming a Workflow

To rename a workflow, follow these steps:

- Select **Administration → Workflows** from the main navigation menu
- Right-click the workflow name and select **Rename Workflow.**
  The workflow name becomes editable:



Workflow Name	Sequence Overview	Actions
Executive Decision Survey	Content Administrator	
GlobalWorkflow	Global Author,Global Approver,Global Publisher	
Legal and Compliance Review	Global Author,Legal and Compliance,Content Administrator	
Product Workflow	COAdmin,Global Approver,Global Publisher	
Test Workflow	Global Approver,Content Administrator	

- Edit the workflow name and click to save changes.
  The new workflow name appears in the Existing Workflow pane.

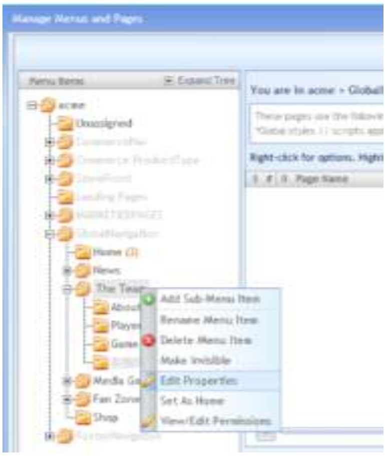
14.6 Deleting a Workflow

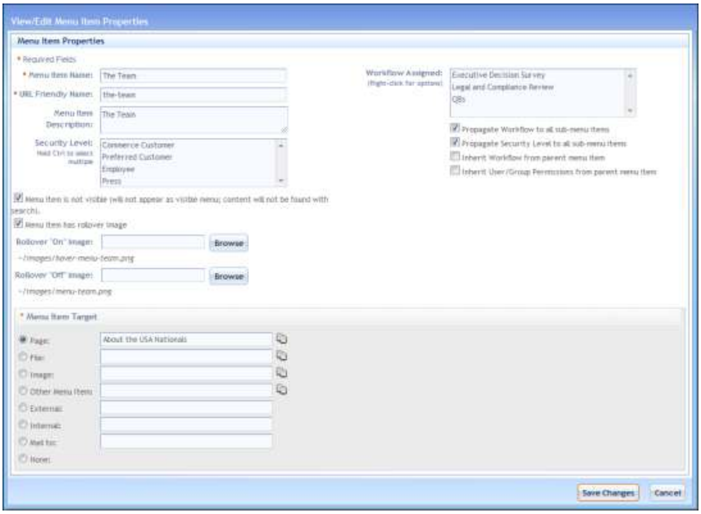
To delete a workflow, follow these steps:

- Select **Administration → Workflows** from the main navigation menu
- Right-click the workflow and select **Delete Workflow.**
  A dialog appears prompting you to confirm deletion.
- Click the **OK** button.
  The deleted workflow no longer appears in the *Existing Workflows* pane.

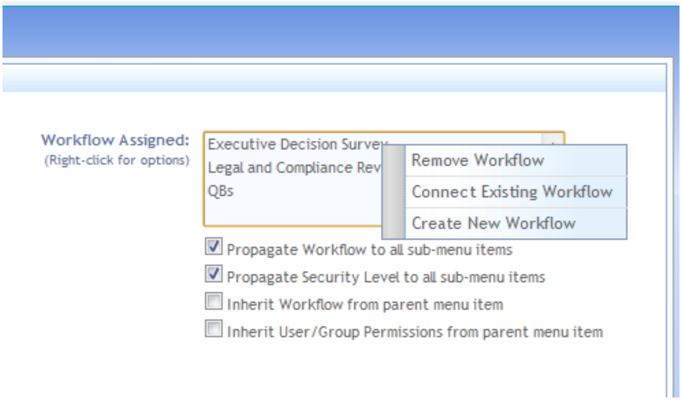
14.7 Removing a Workflow from a Menu Item

- To remove a workflow from a menu item, rather than delete it go to **Libraries → Menus and Pages.**
- Navigate to the menu item in question, right-click and select **Edit Properties** to open the **View/Edit Menu Item Properties** container.





The left side of the page shows the various workflows (if any) assigned to that menu item. If you want to remove one, right click on the workflow name and select **Remove Workflow.**



The workflow will be removed from the menu item. Click *Save Changes* to continue or *Cancel,* if you have changed your mind. Alternatively, you can have the menu item inherit the workflow from a parent or propagate to its sub-menu items. From this container you can also assign workflows here, create a new workflow or change permissions and security levels for the menu item.

15 MANAGING WEBSITE GROUPS AND USERS

This chapter contains step-by-step instructions on how to manage website groups and users. Only Site Administrators can manage website users and groups.

Website groups are very helpful in managing iAPPS users on the site. For example, groups are essential to management of workflows. If you set up a workflow using groups, you can more easily manage their flow.

In general with workflows, it is best to create groups instead of assigning workflows to a single user. Then if a user is out of the office, the workflow will still continue with others in that group. Also, if someone leaves your organization, you don’t have to recreate the entire workflow, just add and delete users as needed.

Groups are also useful for assigning permissions. If you want the members of a department to only be able to edit pages that are relevant to that department, you can place all the department members in a group and then assign permissions to that group instead of having to assign them individual. Alternatively, you can have an ‘everyone’ permissions level that might allow users in Commerce to view the entire site admin without being able to edit it.

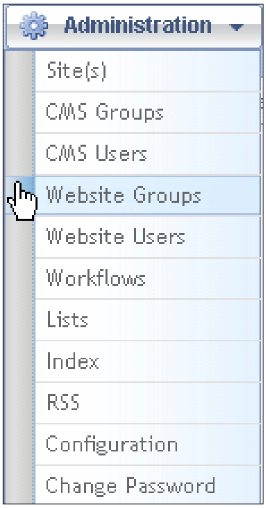
For more information on workflow, see the Creating a New Workflow section of this manual or the more in-depth workflow example in the *iAPPS User Scenario Guide.*

15.1 Managing Website Groups

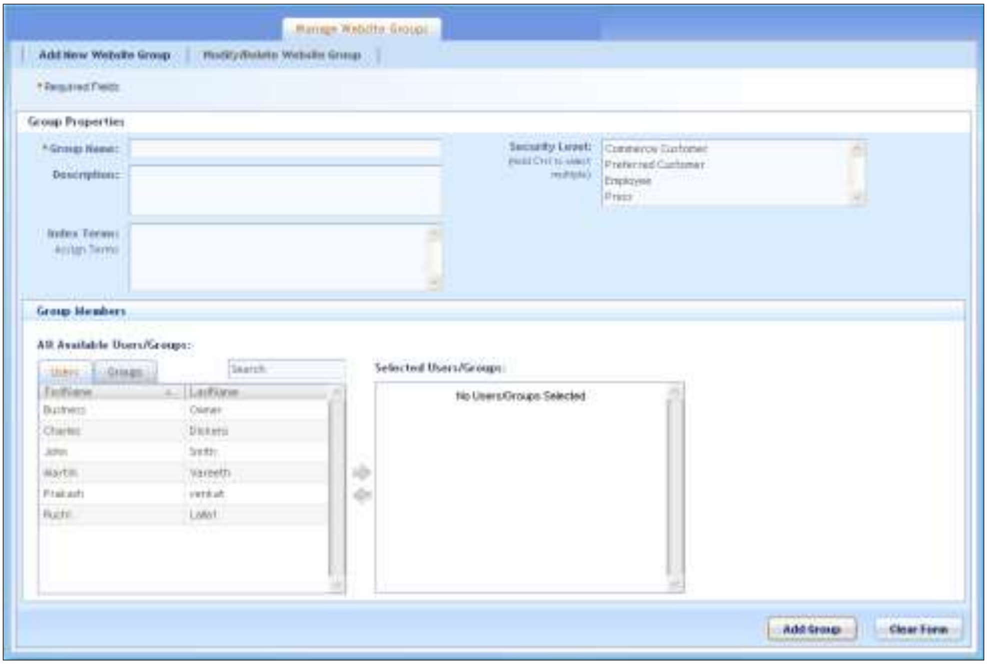
To manage website groups, you perform the following tasks:

- Add a new website group
- Modify / Delete a website group
- Deactivate / Activate a website group

To manage website groups, select **Administration → Website Groups** from the main navigation menu.



The **Manage Website Groups** container appears with the ***Add New Website Group*** tab active:



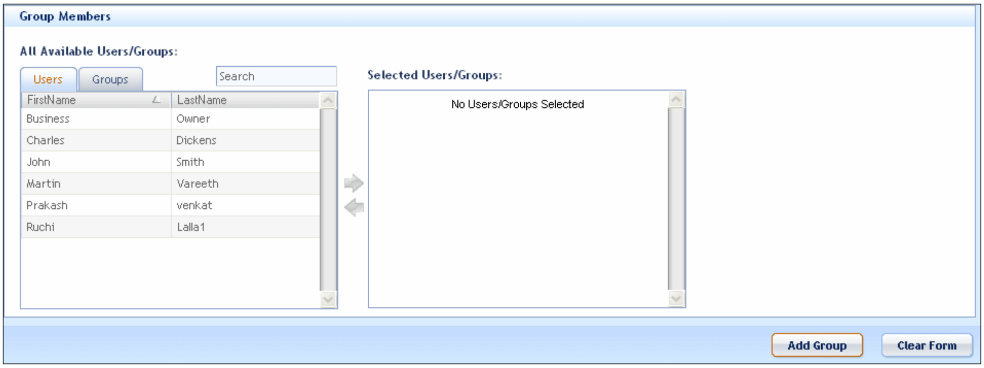
15.1.1 Adding a New Website Group

To add a new website group, follow these steps:

- Click the Add New Website Group tab, if not already active.

- Enter the properties of this group as described in the following table:

Website Group Property	Description
Group Name	Name of group.
Description	Brief description of purpose or content of this group.
Index Terms: Assign Terms	• Click the Assign Terms link to specify index terms for this group. The Assign Index Terms dialog appears. • Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all terms in the folder. • Click the “Save Index Terms” button.
Security Levels	Click to select one or Ctrl+click to select multiple security levels to assign to this group.



- Add Members to this group as follows:
    - Click on the Users or Groups tab to add to this new group.
    - Click on a user or group name in the appropriate list and click to add to the Selected Users/Groups list.

      Optionally, to remove a user or group from the Selected Users/Groups list, click on a user or group name in the Selected Users/Groups list and click .
- Click the **Add Group** button at the bottom of the screen.
  The Mo***dify/Delete Website Groups*** tab becomes active. The new group appears in the *Search/Select Group* pane.

15.1.2 Modifying / Deleting a Website Group

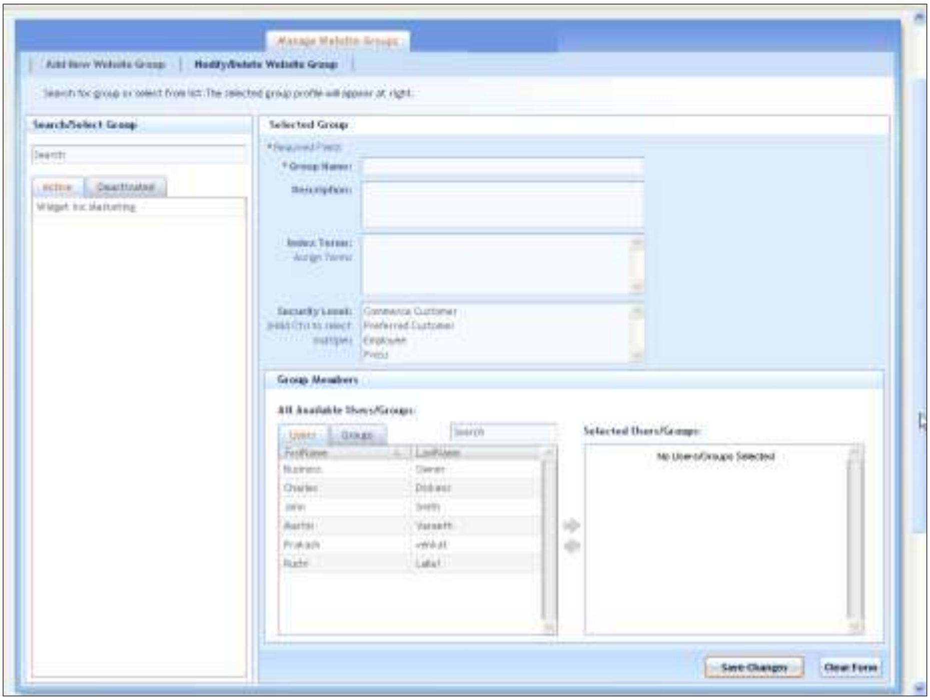
You can modify or delete a website group from the *Modify/Delete Website Group* sub-tab.

To access the Modify/Delete Website Groups page, follow these steps:

- Select **Administration → Website Groups** from the main navigation menu.

  The **Manage Website Groups** container appears with the ***Add New Website Group*** tab active.

- Click the *Modify/Delete Website Group* sub-tab.



This displays the following panes:

Modify/Delete Website Group Pane	Displays
Search/Select Group	List of the existing website groups and a field to search the list for groups that match specified criteria.
Selected Group	Properties of selected website group.
Group Members	Users or groups that are currently members of the selected website group.

15.1.2.1 Modifying a Website Group

Only users with the Site Administrator or Content Administrator role can modify a website group. In addition to editing a website group's properties and group membership, you can also deactivate or activate a website group.

To modify a website group:

- Click the ***Modify/Delete Website Groups*** tab and locate a list by scrolling or entering a group name in the Search box.
- Edit the website group as described in the *Adding a Website Group* section of this guide.
- Click the “Save Changes” button.

15.1.2.2 Deactivating / Activating a Website Group

You can deactivate a group so that it remains in the Website Groups database but cannot be used.

> Deactivating a group disassociates all the workflow responsibilities and permissions for that group. Before deactivating, you should re-assign or transfer all the workflow responsibilities and permissions to a Content Administrator.

To deactivate/activate a website Group, follow these steps:

- Click the *Modify/Delete Website Groups* sub-tab.

  The Modify/Delete Website Group page appears.

- To deactivate/activate, click the Active or Deactivate tab as appropriate
- Locate a Website Group by scrolling through the list or entering a group name in the Search box.

  The Modify/Delete Website Group page displays information about the selected website group.

- Right-click the name of the website group whose status you want to change and select **Activate Group** or **Deactivate Group** as appropriate.

- A dialog box appears prompting you to confirm the status change:
- Click the “OK” button. The website group appears in the appropriate tab according to its current status.

15.1.2.3 Deleting a Website Group

Only users with the Site Administrator role can delete a website group.

> ⓘ If a group is involved in any step in a workflow, you must reassign the workflow responsibilities and permissions to a Content Administrator.

- Click the *Modify/Delete Website Groups* sub-tab.

  The Modify/Delete Website Group container appears.

- Locate a Website Group by scrolling through the list or entering a group name in the Search box.

  Modify/Delete Website Group displays information about the selected website group.

- Right-click on a website group and select **Delete Group**.

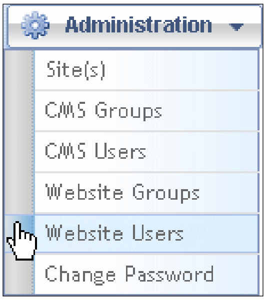
A dialog appears prompting you to confirm deletion. Click the "OK" button. The deleted website group no longer appears in the Search/Select Group list.

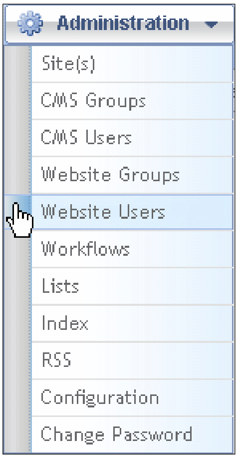
15.2 Managing Website Users

To manage website users, Site Administrators perform the following tasks:

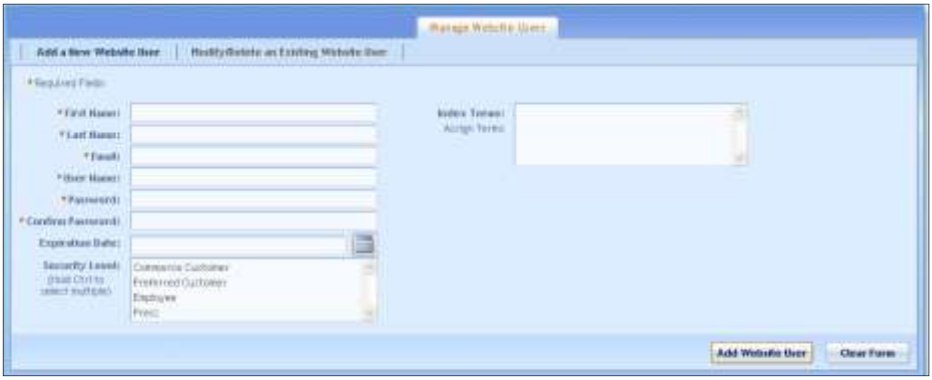
- Add a new website user
- Modify an existing website user
- Deactivate a website user
- Activate a website user
- Delete a website user
- Manage pending requests

To manage website users, you first select **Administration → Website Users** from the main navigation menu.





The **Manage Website Users** container appears with the ***Add a New Website User*** tab active:

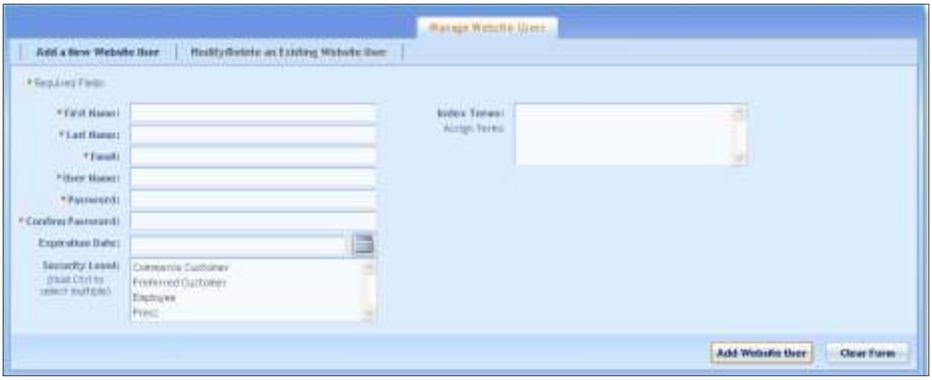


15.2.1 Adding a New Website User

Only users with the Site Administrator role can add a new website user.

To add a new website user, follow these steps:

- Select the Add a New Website User tab, if not already selected.
- The Add a New Website User page appears:

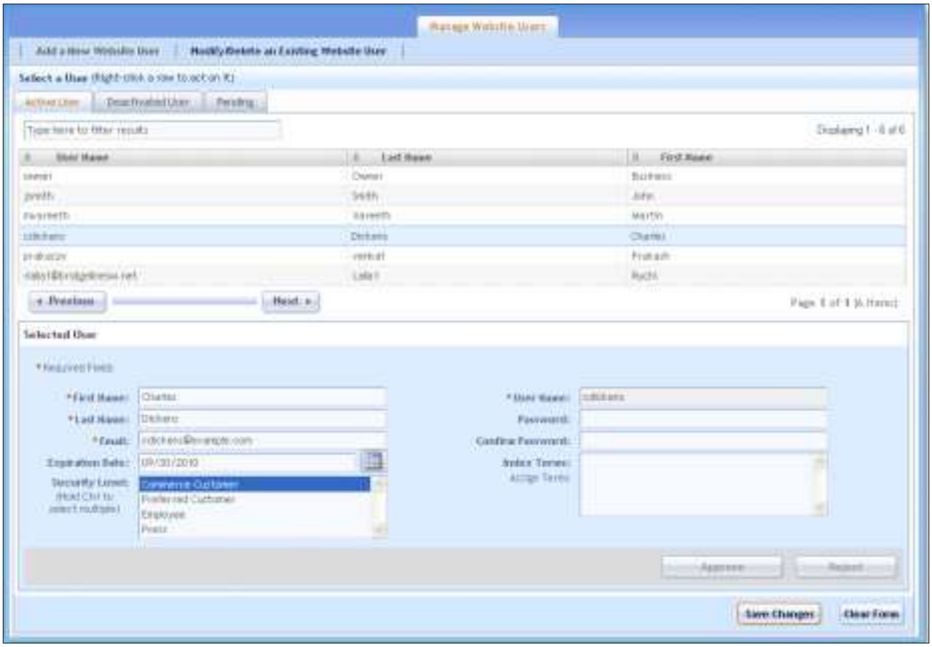


- Enter website user information as described in the following table:

Website User Field	Description
First Name	First name of user.
Last Name	Last name of user.
Email	User’s email address.
User Name	Create a login name* for this user. *Login name must be at least five characters.
Password	Enter a password* that the user must enter to access site. *Password must be at least seven characters and include one special character.
Confirm Password	Enter the password user must enter to access site again to confirm.
Expiration Date	Click the calendar icon to select a date on which this user’s access to site expires.
Security Level	Click to select one, or Ctrl-click to select multiple security levels to specify this user’s level of access to site.
Index Terms: Assign Terms	• Click the Assign Terms link to specify index terms for this user. • The Assign Index Terms dialog appears. • Click the check box beside the Index Term folder or individual Index Term to add to this list. If you select a folder, a confirmation dialog appears, prompting you to specify whether you want to add all

Website User Field	Description
	terms in the folder. • Click the “Save Index Terms” button.

- Click the “Add Website User” button. The **Manage Website Users** container appears with the newly added website user selected:



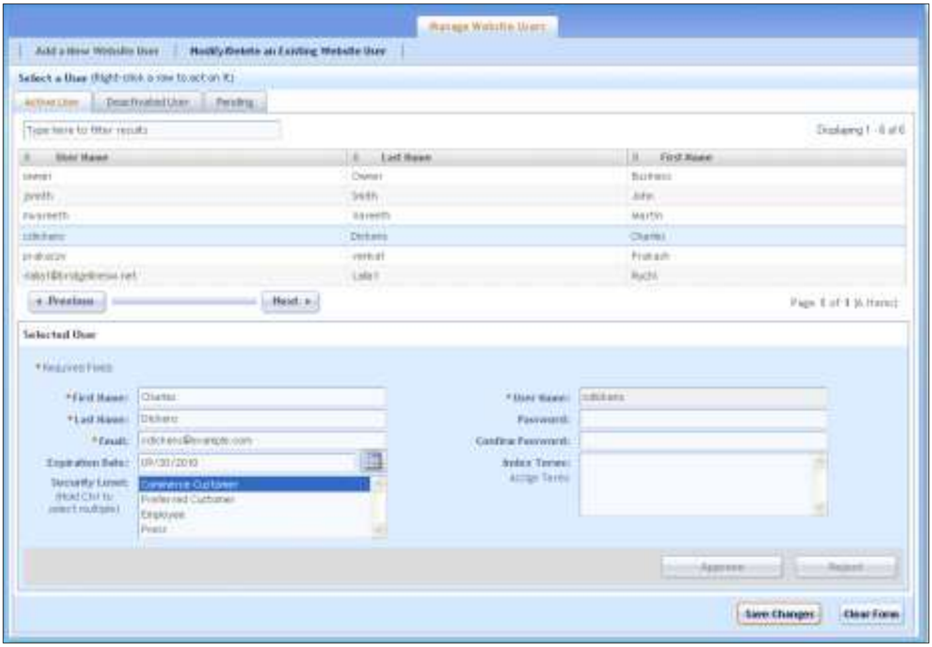
15.2.2 Modifying an Existing Website User

Only users with the Site Administrator or Content Administrator role can modify a website user.

To access the Modify/Delete an Existing Website User, follow these steps:

- Select **Administration → Website Users** from the main navigation menu. The **Manage Website Users** container appears with the ***Add a New Website User*** tab active

- Click the *Modify/Delete an Existing Website User* subtab. The Modify/Delete an Existing Website User options appear:



The Modify/Delete an Existing Website User page displays the following:

Modify/Delete Website User Pane	Displays
Select a User	Tabs for Active, Deactivated, and Pending website users and a list of website users on each tab. Also displays a field to search the website users listed on any tab for the specified criteria.
Selected User	Information about the selected website user.

To modify an existing website user, follow these steps:

User Name	Last Name	First Name
owner	Owner	Business
jsmith	Smith	John
mvareeth	Vareeth	Martin
cdickens	Dickens	Charles
prakaszv	venkat	Prakash
rlalla1@bridgelinesw.net	Lalla1	Ruchi

◂ Previous   Next ▸   Page 1 of 1 (6 items)

- Locate the website user by scrolling through the list or entering a name in the Search box.
- Click the website user name in the list.
  The website user information appears in the Selected User section of the page:
- Modify the website user information as described in the *Adding a New Website User* section of this guide.
- Click the “Save Changes” button.

15.2.3 Deleting/Deactivating an Existing Website User

Only users with the Site Administrator or Content Administrator role can delete an existing website user. To delete an existing website user, follow these steps:

- Select the *Modify/Delete an Existing Website User* sub-tab from the **Manage Website Users** container. The **Modify/Delete an Existing Website User** container appears.
- Click the appropriate tab for the user’s status as Active or Deactivated.
- Locate the website user by scrolling through the list or entering a name in the Search box.
- Click the website user name in the list.
  The website user information appears in the Selected User section of the page:
- Right-click the user name and select **Delete**.

A dialog appears prompting you to confirm

- Click the “OK” button. If deleted, the website user record no longer appears in the list and the user cannot access the website. If activated or deactivated, their user status changes and the user appears in the list under the appropriate website user tab.

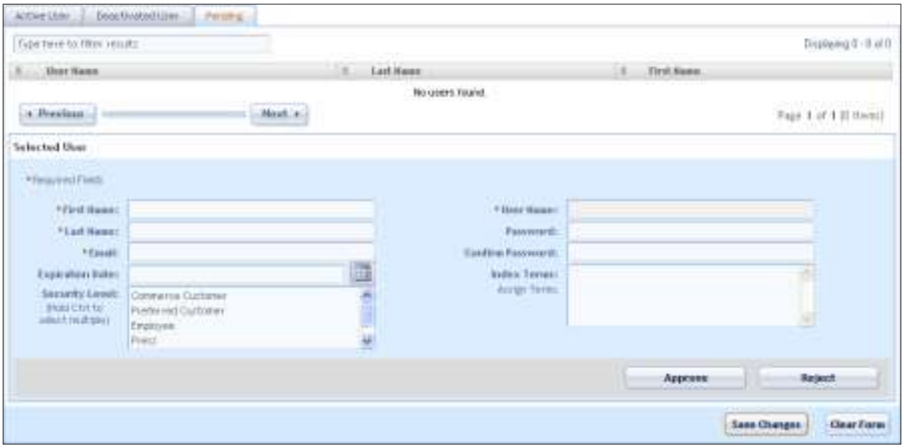
15.2.4 Managing Pending Requests

Only users with the Site Administrator or Content Administrator role can manage pending website user requests.

You can setup access to your website so that new users who register on the website must be approved by a representative of your organization prior to the new user being able to access the website. If you setup access to your website this way, new users who register on the website appear in the user list on the **Manage Website Users → Pending** tab.

To manage pending requests, follow these steps:

- Select the ***Pending*** tab from the **Manage Website Users** container, if not already active.



- Click on the name of a pending website user in the list. Check the information.
- Click the “Approve” button to give this website user access, or click the “Reject” button to deny access.

16 ADMINISTRATIVE TASKS

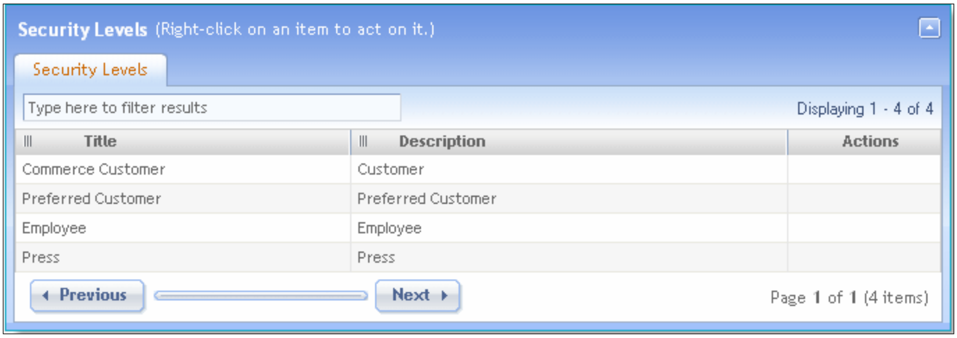
This chapter explains how to perform administrative tasks related to security, caching. And site management. Only Installation or Site Administrators can perform these tasks, except for modifying users, which can be done by Content Administrators.

16.1 Configuring Security levels

You can configure security levels by performing the following tasks:

- Add a new security level
- Edit a security level
- Delete a security level

To configure security levels, select **Administration → Security Levels** from the navigation menu of iAPPS Content Manager's **Control Center**. This opens the **Security Levels** container:



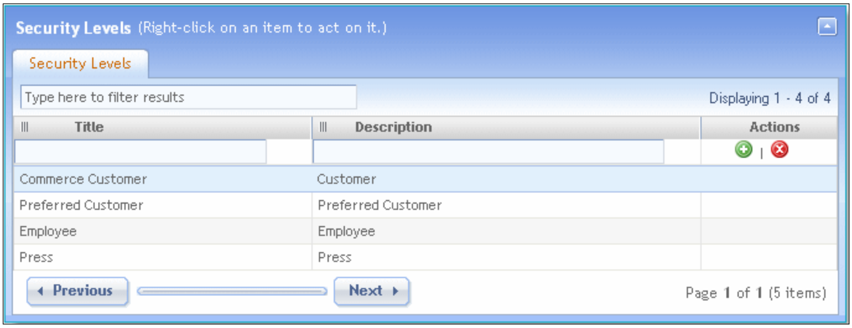
16.1.1 Adding/Renaming Security Levels

To add a new security level or edit Security Levels:

- Select the **Administration → Configuration** from the main navigation menu. The Security Levels page appears.

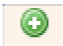
- Locate the security level in the list by scrolling through or entering a level title in the Search Field.
  Right-click on the security level and select **Edit Security Level**.
  OR

- Right-click any row in the security levels list and select **Add New Security Level**.



- Add or Edit security level information as follows:

Security Level Field	Description
Title	Enter a title to identify this security level.
Description	Enter a brief description of the use or purpose of this security level.

- Click  to save. The new security level appears in the “Security Levels” table.

16.1.2 Deleting a Security Level

To delete a security level,

- Select **Administration → Configuration** from the main navigation menu. The **Security Levels** container appears.
- Locate the security level in the list:
- Right-click on the security level to delete and select **Delete Security Level.**

A dialog appears prompting you to confirm the deletion:

Click the *OK* button.

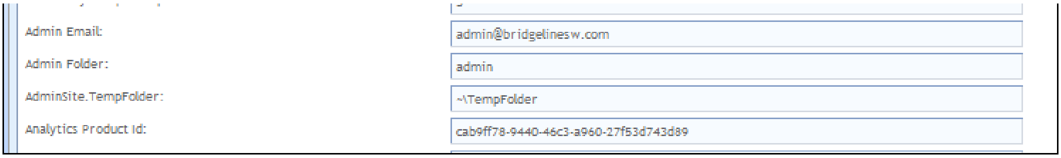
16.2 Cache Information

An installation Administrator can reset the cache for the site by choosing **Administration → Cache.**

16.3 Site Settings

An installation Administrator can also access site settings. Settings will only rarely be changed. The one most likely to be used is the Admin email to which messages about the system are sent. It is best to use an email alias that forwards to a user in your company rather than constantly changing the Admin email in the site settings.

To access site settings, choose **Administration → Site Settings.** A full description of the site settings is in the Content Manager Developer Guide.



16.4 Site Administration

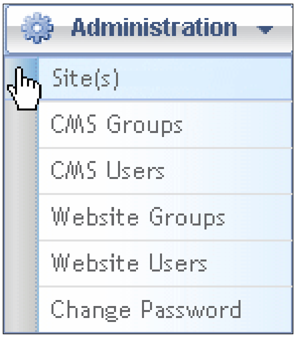
This section contains step-by-step instructions on how to manage site creation and copying. These tasks can only be done by a Site or Install Administration, and will not be undertaken very often.

Installation Administrators can perform the following tasks:

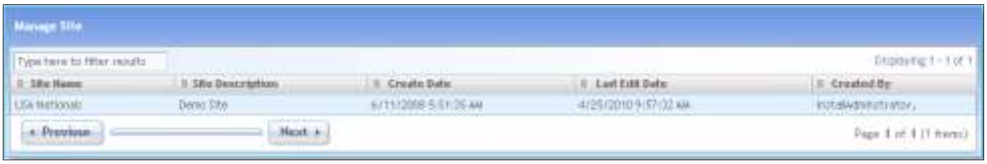
- Create a new site
- Edit site

- Delete site
- Backup site
- View backup history
- Copy site

To manage a site, select **Administration → Site(s)** from the main navigation menu:



The **Manage Site** container appears:



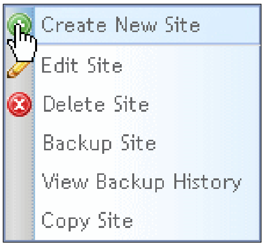
The **Manage Site** page displays the following:

Column Name	Description
Site Name	Name of site.
Site Description	Brief description of site purpose or content.
Create Date	Date on which site was created.
Last Edit Date	Date on which site was created.
Created By	Name of user who created site.

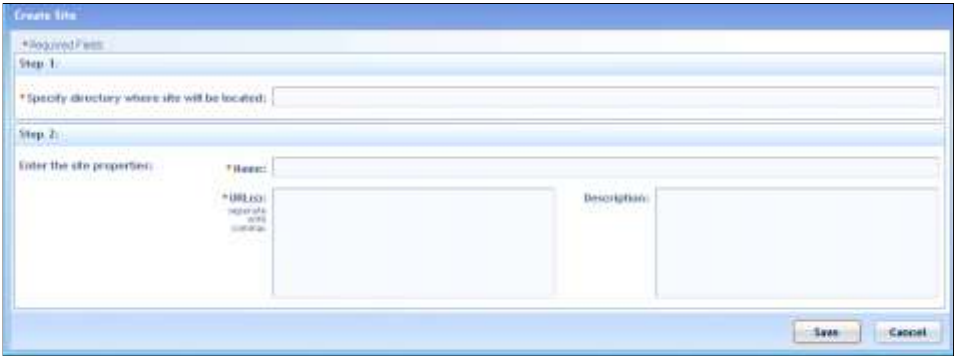
16.4.1 Creating a New Site

To create a new site, follow these steps:

- **Select Administration → Site(s)** from the main navigation
- Right-click a site in the site list and select the **Create New Site**.



The **Create Site** container appears:



- Enter the name of the directory in which to create the site in the Step 1 of the wizard.
- Enter site properties in the Step 2 of the wizard as described in the following table:

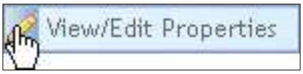
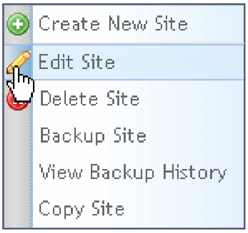
Site Property	Description
Name	Enter the name of this site.
URL	Enter one or more URLs, separated by comas, by which users access this site. Enter URL in following format: http://www.somesite.com
Description	Enter a description of the purpose of content of this site.

- Click the “Save” button. The site now appears in the **Manage Site** container.

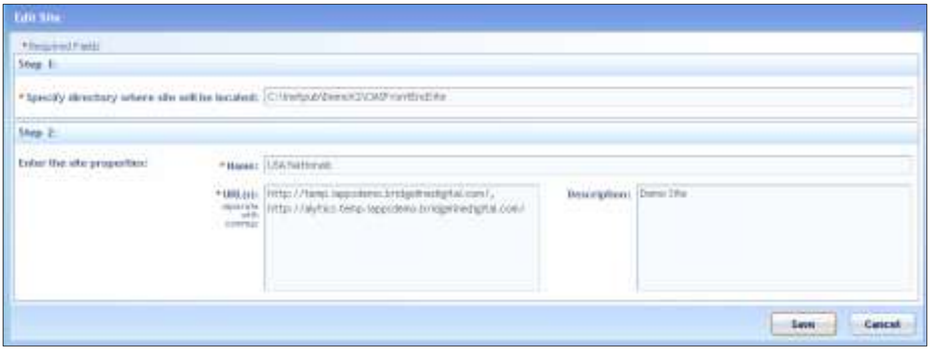
16.4.2 Editing Site Properties

To edit site properties, follow these steps:

- From the

Control Center	**Manage Site Page**
Right-click on a site in the **Manage Site** container and select **View/Edit Properties**. 	Right-click on a site in the **Manage Site** container and select **Edit Site**. 

The **Edit Site** container appears:

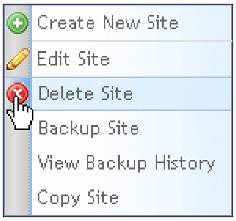


- Edit site information as described in the previous section (Creating a New Site) of this guide.
- Click the “Save” button.

16.4.3 Deleting a Site

To delete a site:

- Select **Administration → Site(s)** from the main navigation menu.
- Right-click the name of the site to delete in the site list and select **Delete Site**.



A warning dialog box appears prompting you to confirm the deletion:

- Click the “Delete” button.

16.4.4 Backing-up a Site/Viewing Backups

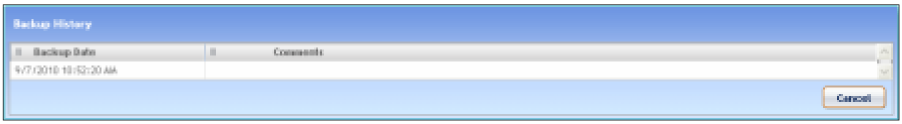
To backup a site, follow these steps:

- Select **Administration → Site(s)** from the main navigation.
- Right-click the name of the site you want to back up and select **Backup Site**. The ***Backup Site*** pop-up appears.
- Content Manager automatically records the date of any backup. Optionally, enter any additional information about this backup to save in the ***Add Comments*** text box.
- Click the “Backup Site” button.

Viewing Backup History

You can view a list of all backups for a site. To view the backup history of a site, follow these steps:

- Select **Administration → Site(s)** from the main navigation menu.
- Right-click the name of the site for which you want to view back up history and select **View Backup History**. The Backup History container appears.



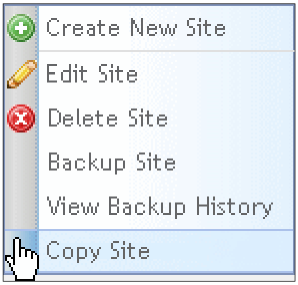
- Click the “Cancel” button to return to the **Manage Sites** container.

16.4.5 Copying a Site

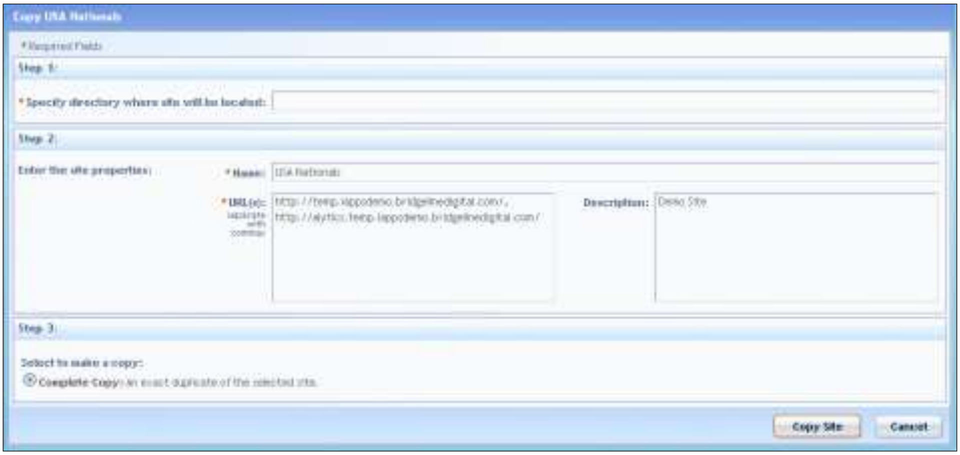
You can copy a site to create a new site with the same URL but a different physical location or site name. You may want to do this if you are changing your company name and internet domain name.

To copy a site, follow these steps:

- Select **Administration → Site(s)** from the main navigation menu.
- Right-click the name of the site to copy and select **Copy Site**.



The Copy Site page appears:



- Specify the following information about this site (you cannot edit the URL—that must be set up in development):

Site Property	Description
Specify directory where site will be located	Enter the name of the directory in which to create the site
Name	Enter the name of this site.
Description	Enter a description of the purpose of content of this site.

- Click the “Copy Site” button to save this site.

  The site appears in the **Manage Sites** container on the Control Panel.

16.5 User Permissions Tables

The following table provides a list of index, workflow, and RSS management tasks available from the iAPPS Control Center. It shows which user roles have permission to perform each of these tasks.

Table 1 Index, Workflow, and RSS Management Tasks and User Roles

Tasks/User Roles	Content Administrator	Author	Approver
MANAGE INDEX:			
Add an index sub-term	✓		
Delete an index term	✓		
Rename an index term	✓		
MANAGE WORKFLOW:			
View a workflow	✓	✓	✓
Edit a workflow	✓		
Assign a workflow to a page	✓		
Rename a workflow	✓		
Delete a workflow	✓		
Base a new workflow on an existing workflow	✓		
Create a new workflow	✓		

Tasks/User Roles	Content Administrator	Author	Approver
MANAGE RSS CHANNELS AND FEEDS:			
Add a new RSS channel	✓		
Delete an RSS channel	✓		
View and edit an RSS channel	✓		
Add a new RSS feed	✓		
Delete an RSS feed	✓		
View and edit an RSS feed	✓		

The following table provides a list of Display Library and Data Library management tasks available from the iAPPS Control Center. It shows which user roles have permission to perform each of these tasks.

Table 2 Display and Data Library Management Tasks and User Roles

Tasks/User Roles	Content Administrator	Manager	Viewer
Display Libraries			
Manage Styles Library:			
Archive a CSS file	✓		
Edit CSS file properties	✓		
View a CSS source file	✓		
View pages that use a CSS file	✓		
Add a CSS file	✓		
Manage Page Templates Library:			
Preview a page template	✓		
Archive or restore a page template	✓		
Edit page template properties	✓		
View pages using a page template	✓		
Add a page template	✓		

Tasks/User Roles	Content Administrator	Manager	Viewer
Manage Content Definition Templates Library:			
Edit content definition template properties	✓		
Add a content definition template	✓		
Archive a content definition template	✓		
Data Libraries			
Manage Content Items Library:			
Edit content item properties	✓	✓	
View a content item	✓	✓	✓
Assign index terms to a content item	✓	✓	
Archive a content item	✓	✓	
Add a new content item	✓	✓	
Manage Images Library:			
Add an Image	✓	✓	
View image information	✓	✓	✓
Edit image information	✓	✓	
View history of an image	✓	✓	
Rollback an image to previous version	✓	✓	
Show actual size of an image	✓	✓	✓
Assign index terms to an image	✓	✓	
Delete an image	✓	✓	
Manage Files Library:			
View a file	✓	✓	✓
Edit file properties	✓	✓	
View history of a file	✓	✓	✓
Delete a file	✓	✓	

Tasks/User Roles	Content Administrator	Manager	Viewer
Assign index terms to a file	✓	✓	
Add a file	✓	✓	
View pages that use a file	✓	✓	✓

The following table provides a list of site and user management tasks available from the iAPPS Control Center. It shows which user roles have permission to perform each of these tasks.

Table 3 Site and User Management Tasks and User Roles

Tasks/User Roles	Content Administrator	Site Administrator	Installation Administrator
Manage sites:			
Create a new site			✓
Edit a site		✓	✓
Delete a site		✓	✓
Backup a site		✓	✓
View backup history of a site		✓	✓
Copy a site		✓	✓
Manage Security Levels:			
Add a security level	✓		
Edit a security level	✓		
Delete a security level	✓		
Manage CMS Groups:			
Add a new CMS group	✓	✓	
Modify or delete a CMS group	✓	✓	
View and edit CMS group permissions	✓		
Manage CMS Users:			
Add a new CMS user		✓	✓

Tasks/User Roles	Content Administrator	Site Administrator	Installation Administrator
Modify or delete a CMS user	✓	✓	✓
Deactivate or activate a CMS user	✓	✓	✓
View CMS user permissions	✓	✓	✓
Manage Website Users:			
Add a new website user		✓	
Modify or delete a website user	✓	✓	
Deactivate or activate a website user	✓	✓	
Delete a website user	✓	✓	
Approve or reject a pending website user	✓	✓	

17 CHANGES FOR iAPPS 4.8

iAPPS 4.8 features a sleek new user interface that increases readability and usability. This release also has some functional changes, such as:

- New Control Center Appearance
- Usage Meter Chart
- Help Videos
- New Site Editor Toolbar options.
- Linking Commerce Product Details to Content Manager Pages
- Linking to Analyzer Watched Events
- Excluding Menus and Pages from Search
- Time Zones for Scheduled Publishing
- Workflow Changes

In addition, there are some additional functions for administrators, such as new Site Settings, changes to workflow and the ability to create 301 redirects from the Administrative Interface.

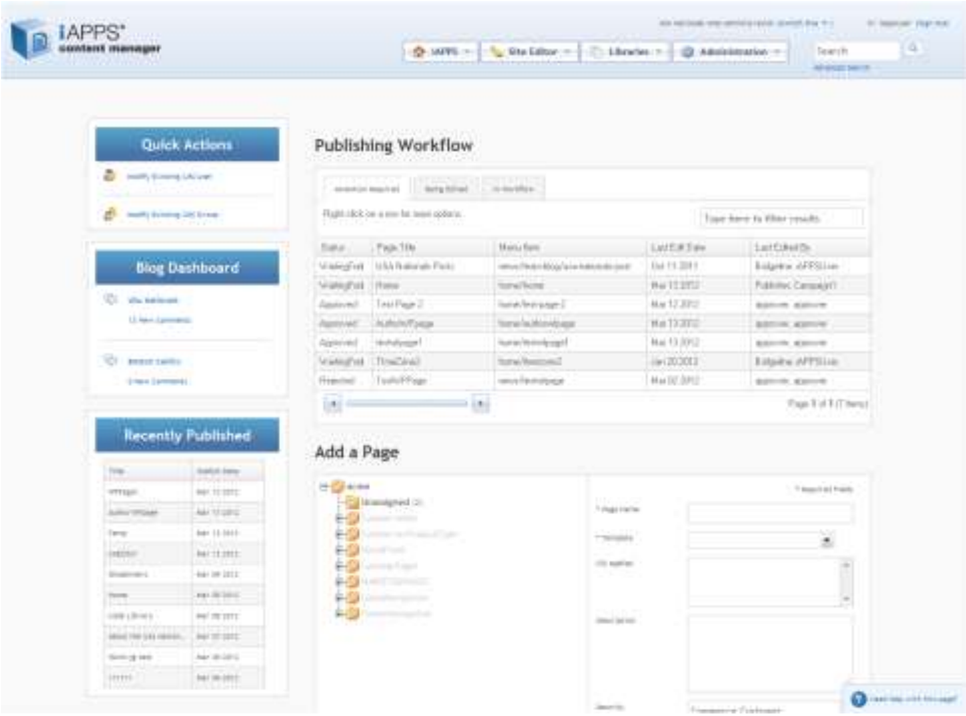
17.1 Changes to the User Interface

iAPPS 4.8 features a updated look that enhances readability. Along with our new look, there are additional changes to iAPPS Content Manager and the rest of the iAPPS product suite.

Now you can tell where you are within the admin UI, as well as easily switch tasks by using the “breadcrumbs” along the top of each page. If you wanted to switch from Website sites groups to the Control Center, as seen in the example below, you can simply click on the Home link in the breadcrumb, rather than using the drop down menu. This functionality exists in the other iAPPS products as well.

17.1.1 New Control Center Appearance

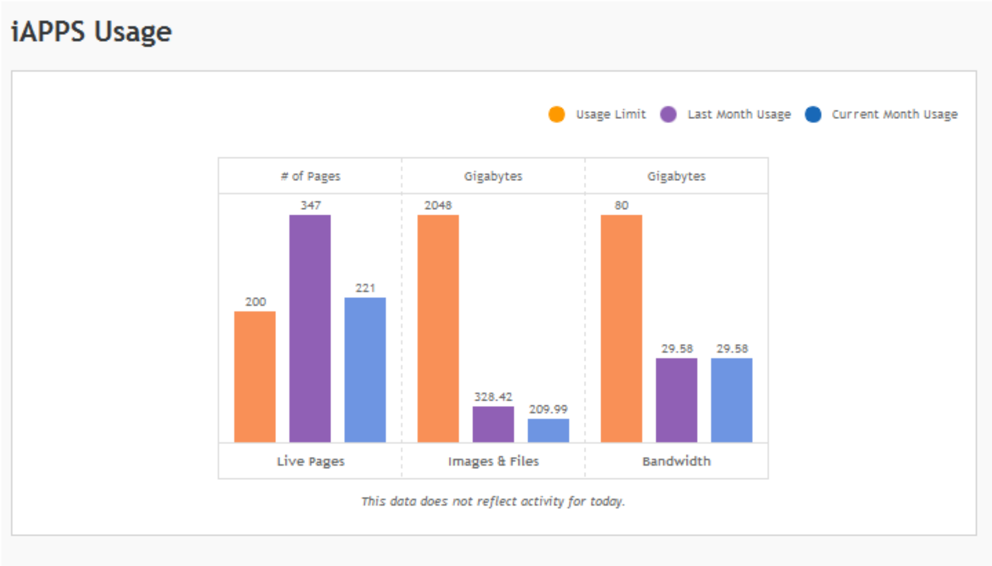
The place where you are mostly likely to see the UI changes is to your iAPPS Content Manager Control Center. All your familiar containers such as Quick Actions and the Blog Dashboard are still there, although they may have moved around the screen a bit. We've even added a few new functions.



Administrators also see some additional containers such as Manage Site and an updated Usage Meter.

17.1.2 Usage Meter Chart

The Content Manager Control Center features an updated usage chart that quickly illustrates usage statistics for your installation of iAPPS. This includes the number of live pages on your site, the size of your image and file libraries and site bandwidth usage.



17.1.3 Help Videos

Having trouble? iAPPS now features many help videos through the administrative interface and more are coming. If you see the **Need Help** logo at the button right corner, click to see a help video for tasks that are on that page or screen.

17.2 Site Editor and Front-End Changes

Other changes include extra features that you can access while adding content to rich text areas or content definitions while in the Site Editor.

17.2.1 New Site Editor Toolbar options

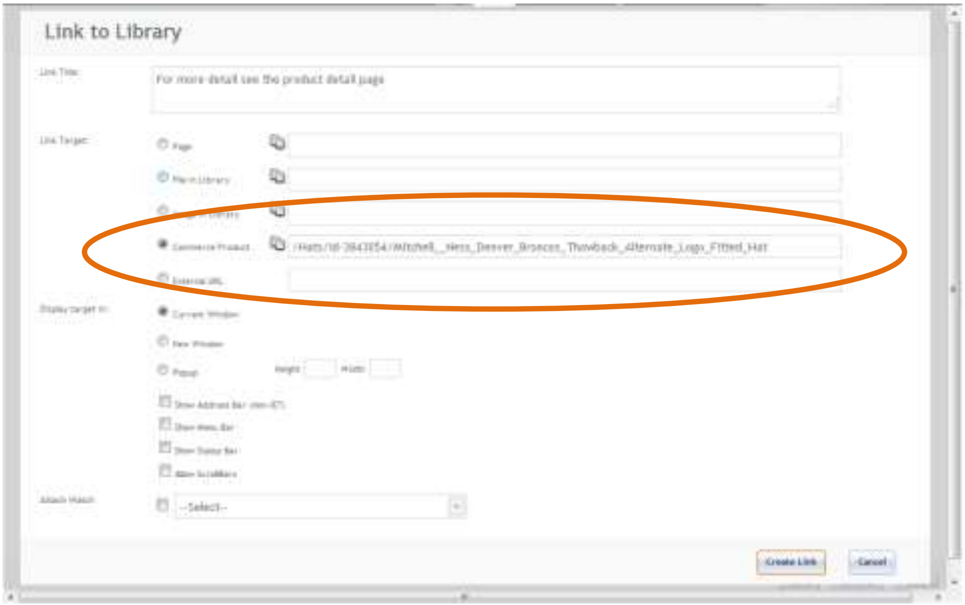
iAPPS now offers a choice between the default Telerek/RAD Editor and a new option of CKEditor. For most users the functionality is very similar. Site Administrators can choose which tool bar is being used by going to **Administration → Site Settings → Global Settings** and choosing from the dropdown menu under *Editor to Use* The default editor is the Telerek editor used in previous versions of iAPPS. Full details on the editor buttons can be found at the end of this chapter.

New CKEditor Toolbar

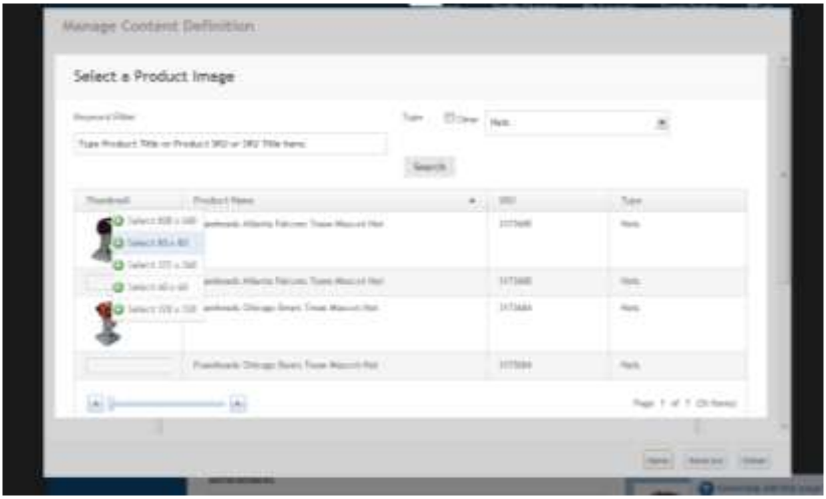
17.2.2 Linking to Commerce Product Detail Pages and Images

Users now have the ability to link to product detail pages, which are produced dynamically from iAPPS Commerce data. This feature is available from both the rich text content areas and content definitions.

Simply use the Link to Library icon  on the Site Editor Toolbar as you would do to link to other iAPPS content. Along with choosing a file, page or image in the libraries, you can now also choose a Commerce Product. The front end of the site will dynamically link the content to a Product Detail Page for the selected product.



You can also now insert product photos as well. While in a content area, click the *Insert Image* button to receive a product search popup. Products can be filtered by type or via a keyword search.



- Once you have located the product, right click to receive options on the size of the photo. Highlight one and click to insert the image.
- Once you have inserted the photo on the page, you can also adjust properties such as alignment, borders or links, or width and height. Right click on the photo and chose **Image Properties.**

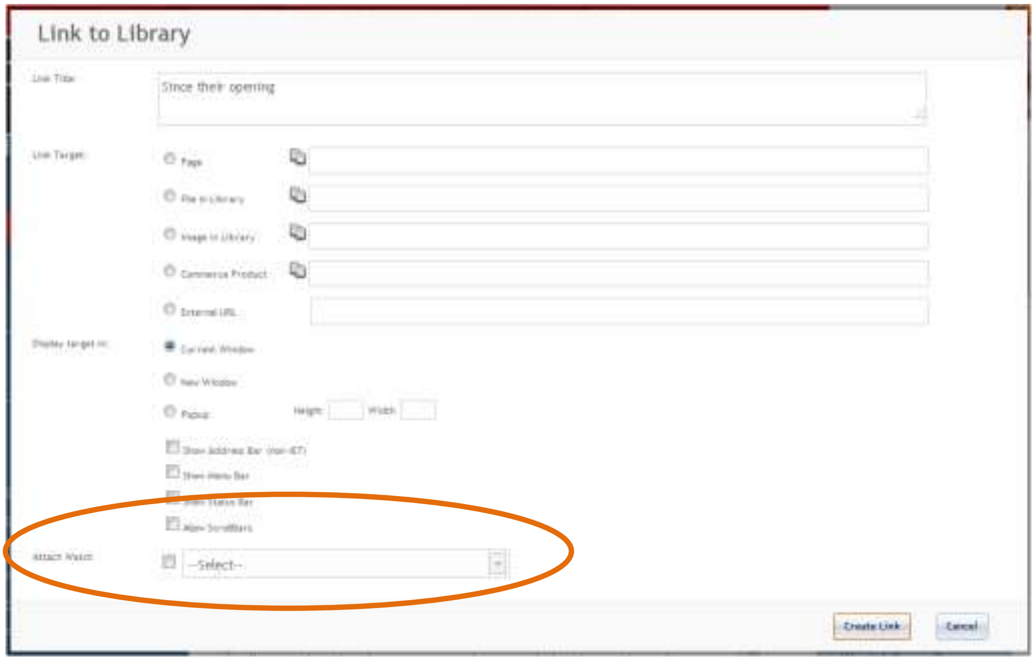
17.2.3 Save As Functionality

Users can now use Save As functionality on Content Definitions as well as Rich Text.

17.2.4 Linking to Analyzer Watched Events

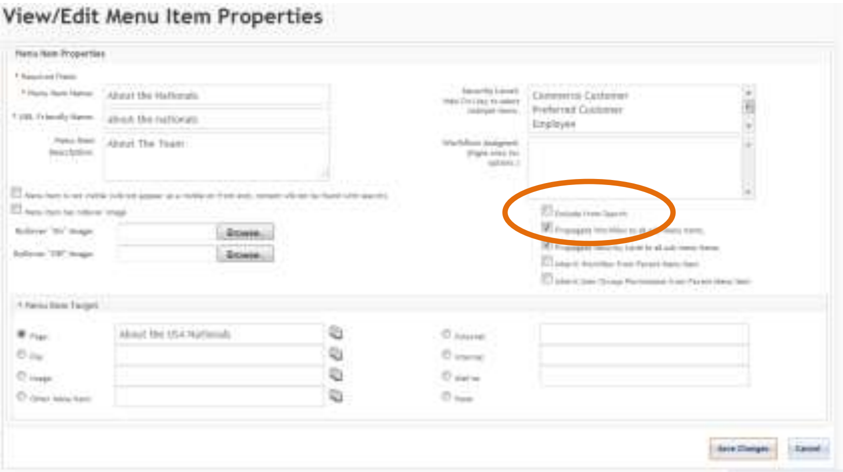
Users can now easily link their Analyzer Watched Events to specific content in Content Manager through the Link to Library feature.

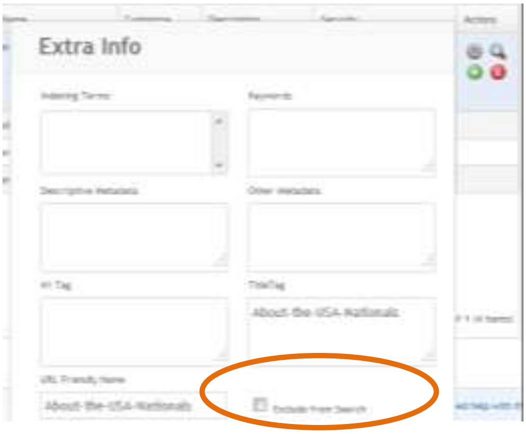
- While in Site Editor, right-click to edit or created text in a Rich Text Area or Content Definition. Highlight the text you want to link to a watch.
- Choose *Link to Library* from the WYSISWYG Menu Bar.
- At the bottom, click the box *Attach Watch*. The dropdown menu will populate with any Watched Events set up in Analyzer. Simply choose the watch you want and click *Create Link.*

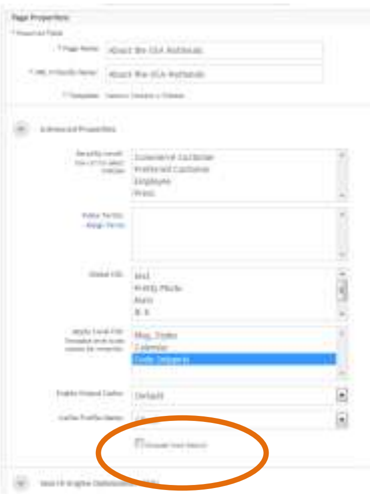


17.2.5 Exclude from Search

Individual Menu items and Pages can now be excluded from the Site Search functions by checking the “Exclude from Search” box in **Menu Item Properties, Page Properties** (accessed from Site Editor) or **Extra Info** (Page accessed from Menus and Pages). This will enter the pages URL into the general robots.txt file that excludes items such as Shopping Cart or Checkout Pages from searches.





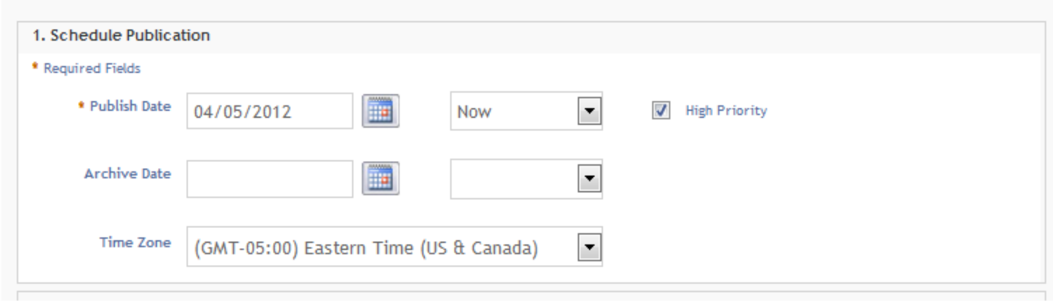


From Menus and Pages

From Site Editor

17.2.6 Time Zones for publish

Users who are scheduling publishing can now pick a time zone for scheduled publishing. Choose *Submit to Workflow* from the Site Editor and choose the appropriate time zone in the *Schedule Publication* Area.



17.2.7 Workflow Changes

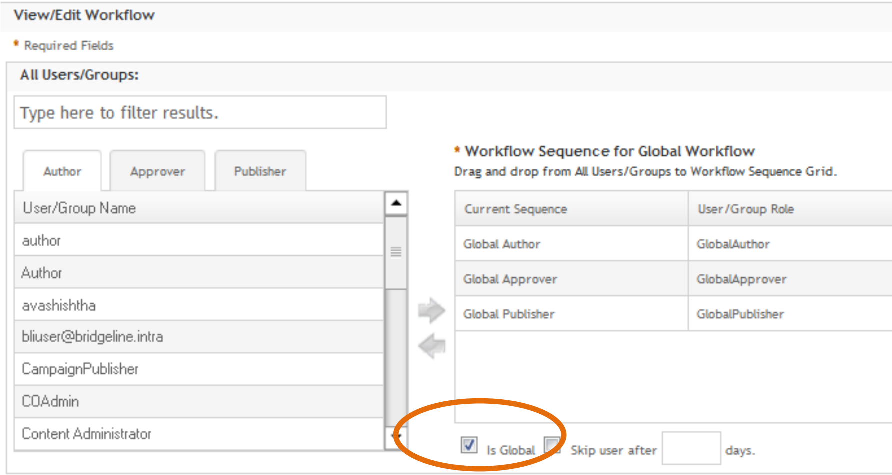
There are two changes to workflow.

Administrators can now change a site setting to enforce workflow on all pages published in Content Manager. This means no authors can publish if the content has not gone all the way through the workflow process. Go to **Administration → Site Settings → General Site Settings** and set *CanPublishWithoutWorkflow* to False.

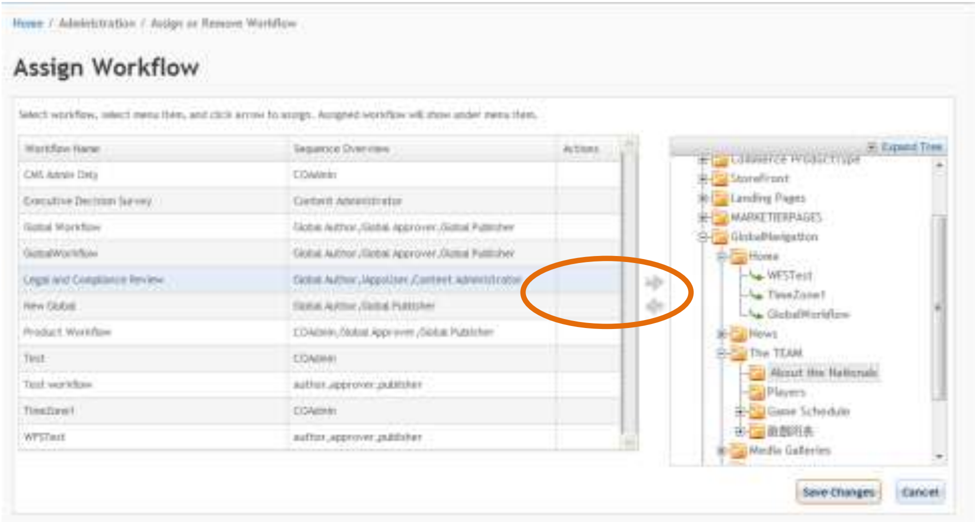
Day-to-day users will not see much change in the way workflows perform and move from one user to another. However if the global site setting has been turned on to require workflows, no user, whatever their level of permissions or role, will be able to publish until the content has gone through a workflow.

In addition, administrators can now set up a global workflow. Go to **Administration → Workflows**. Create or Edit any workflow, and check the box at the bottom of the View/Edit Workflow area bottom to make the workflow global.

Users can still choose a custom workflow instead of the global workflow, but otherwise it will apply to all content.



- Administrators can now also assign and remove workflows from menu items via the Workflow administration screens.
- Go to **Administration → Workflows**. When the workflow screen appears, right click on the workflow you wish to assign or remove and select **Assign/Remove Workflow.**
  A new Assign Workflow screen appears.



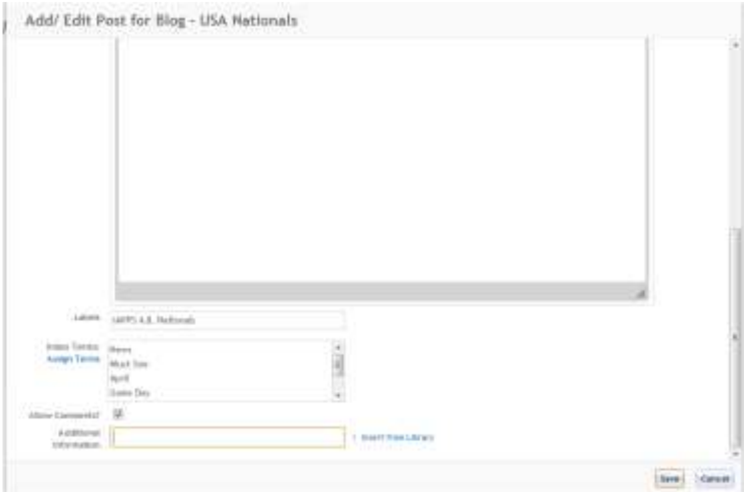
- On the right, navigate to the menus or pages to which you wish to assign a workflow and highlight the item.
- Next, highlight a workflow in the left box and click the right-facing arrow to assign the workflow.

- To remove a workflow, highlight the menu or page item and click the left-facing arrow to remove it.

17.2.8 Blog Post Additional Information Field

iAPPS now features the ability to add additional custom blog identification properties. At the end of the Add/Edit Post for Blog popup, there is a new field for Additional information. This allows for the creation of custom Blog Post property fields. Thus along with Location or Author name, you might want to include an author photo. To add an additional field, a developer must create a content definition for it. Users can then add content to the field by clicking the Insert from Library link although the content will not appear on the front-end until a developer modifies the XSLT to account for the addition.

See the *Content Manager Developer Guide* for more detail.



17.3 Additional Administrative Tasks and Functionality

The remaining changes are meant largely for Installation Administrators and most iAPPS users will not need to worry about them.

17.3.1 301 redirects

301 redirects are now managed through the iAPPS admin user interface.

A “301 redirect” refers to a standard internet code (such as 404 for a page that cannot be found), which tells search engines that the URL of a webpage has been permanently changed.

- For example, your old naming system might have used numbers such as www.company.com/cm58947. Under the iAPPS friendly URL system, the name of this page might be changed to www.company.com/about-us/phone-directory.
- The 301 redirect is simply an automated message redirecting any browser or search engine that tries to reach the old URL to the new Friendly URL.
- The 301 message also notifies search engines that this URL has been permanently changed, so that in the future searchers should be directed straight to www.company.com/about-us/phone-directory. Such redirection is important for SEO purposes.

You may have many 301 redirects when you launch your site, and these will be bulk entered by a developer. That set of redirects will not appear in your Admin UI.

Generally you will not need to add 301 redirects very often once your site is launched because iAPPS automatically creates redirects when you change the names of pages existing within the CMS. Additional redirects will be rare unless you make major changes to your site.

ⓘ **Note:** 301 redirects are only for **permanent** changes in your site structure. **They ARE NOT for temporarily redirecting landing or campaign pages.** You can temporarily redirect items by setting up short Friendly URLs or by changing the Menu Item Targets (See Editing Properties of a Menu Item for details). For additional information on landing pages, see the Scenario on setting up pages outside of Navigation in the *iAPPS User Scenario Guide.*

ⓘ **Note**: Be very careful when entering redirects to ensure you do not accidently create a redirect loop. **If you enter a recursive redirect, the loop can bring down the entire site!!!**

- To enter a new Redirect, right-click on an existing line and select **Add Redirect.** Fill in the new and old URL information. Click the green plus sign to save.

- To remove an existing redirect (this will be very rare), highlight the line, right-click and choose **Delete Redirect.**

See the Content Manager Developer Guide for more information on how to bulk upload a list of 301 redirects. This is often needed during the site launch, for example, when many pages from an old site may have new names in iAPPS.

17.3.2 Additional Site Administrator/Developer Changes

There are also some changes to the site settings, scheduled tasks and search functionality.

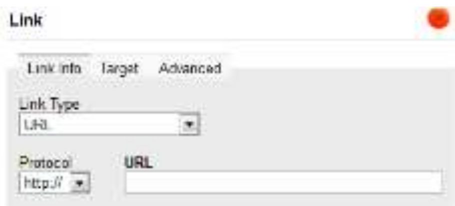
Some Site Settings that administrators may need to access include:

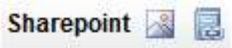
- Editor to use
- Can Publish without Workflow

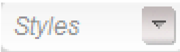
For more details on these see the *Content Manager Developer Guide.*

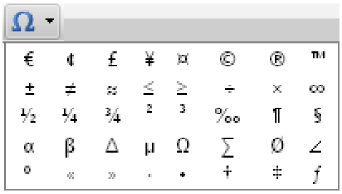
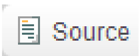
17.4 WYSIWYG Editor Buttons

CK Editor Icon	Description
	Check Spelling Checks the spelling and grammar of the text.
	Find Find text
	Replace Replace text
	Select All Selects All Text
	Cut Cuts selected content and move to clipboard.

CK Editor Icon	Description
	Copy Copies selected content to clipboard.
	Paste
	Paste Plain Text. Removes formatting of text and pastes as plain text into the editor.
	Paste from Word. Pastes content copied from Word, removing non-web tags.
	Remove Formatting Removes formats from highlighted text
	Undo Undoes the last action.
	Redo Redoes/repeats the last action that has been undone.
	Insert image Displays the Insert Image from Library dialog where you select an image to insert into text container.
	Edit Image Displays an image editing dialog for the selected image.
	Link to Library Displays dialog to specify link target for selected text to content in Content Manager libraries or an external URL.
	Link Opens Dialog box to create hyperlinks to text anchors, URLs and email addresses 
	Unlink Removes selected link.
	Insert Anchor

CK Editor Icon	Description
	Insert Flash From Library Displays dialog to insert a Flash file from a Content Manager library and set its properties.
	Insert Product Image Opens a dialog where you can search for and choose a product to have its product image inserted on the page.
	Insert links to SharePoint assets such as images, page and files. You will need to have all appropriate permissions for any SharePoint content you wish to insert. **Note:** Once content is drawn in from a SharePoint library, it is not dynamically updated. This is to prevent changes to your SharePoint library if users in iAPPS make changes to the content. If there are changes to your SharePoint content, you will need to reimport the material into iAPPS.
	Translate highlighted text into additional languages. Remember that this is a basic translator and you may want to have your website content reviewed by a professional translator.
	Left Alignment Aligns selected text to the left.
	Center Alignment Aligns selected text to the center.
	Right Alignment Aligns selected text to the right.
	Justify Aligns selected text justified.
	Indent Indents selected text to the right.
	Outdent. Indents selected text to the left.
	Numbered List Inserts/removes a numbered list.
	Bulleted List Inserts/removes a bulleted list.
	Insert Table Displays the table editor.

CK Editor Icon	Description
	
	Horizontal Rule Inserts a horizontal rule.
	Apply CSS Class Displays a list of available CSS classes available to format selected text. 
	Paragraph Format Shows the current style and displays a dropdown list of paragraph styles to apply to selected text, such as Header Size.
	Bold Applies bold formatting to selected text.
	Italic Applies italic formatting to selected text.
	Underline text Applies underline formatting to selected text.
	Strikethrough Applies strikethrough formatting to selected text
	Insert subscript
	Insert superscript
	Text Direction from the Left
	Text Direction from the Right

CK Editor Icon	Description
	Insert Block Quote
	Insert page div Inserts an html page division
	Insert Special Character Displays dialog to insert a symbol into text. 
	Show Blocks Displays individual paragraphs, and page divisions within the content area.
	Save selection as snippet. Displays dialog to name selected text and save it as text snippet in Snippet Manager.
	View in Browser When working on an email in Marketier, inserting a View in Browser link allows users to quickly see the message in a web browser instead of their email program.
	Page Source Shows the source HTML for the relevant content area you are editing.
	Help Displays edit tools help dialog.
	Save Saves changes to existing content item in content library or displays dialog to save new text as new content item in content library and then closes the toolbar and returns to Site Editor.
	Save As Displays dialog to save text as new content item in content library.
	Cancel Ends current function or closes editor.

18 FREQUENTLY ASKED QUESTIONS

Below are a number of Frequently Asked Questions about iAPPS. You can also consult the *iAPPS User Scenario Manual* for additional information.

What the difference between Copy Page and Copy as New? Which should I use?

Generally, unless you need exactly the same content in two pages for the long term, you will likely want to use Copy as New.

- Copy Page creates a shortcut to the old page in another menu node. The content items are re-used and shared, rather than duplicated. Thus, any changes to a content item will affect *both* pages.
- Copy as New creates a new page with the content of the old page. The content items on the page are initially the same, but they are no longer linked so you can swap out a content item on one page and it will not affect the other page. If there is still some content on the page you want to share, you can simply insert the shared content as usual.
- How do I know if the page is in edit mode?
- You will be able to see the green iAPPS edit boxes. But you should also be able to see the Edit Mode Icon is darker than other icons on your Site Editor main menu pull-down.

Why aren’t my changes appearing?

There could be a number of reasons.

- Did you save properly? Remember that you have to save a content item or definition via the WYSIWYG Rich Text Editor AND you need to save the page as a whole.
- Have you published the page?
- Make sure the page has not been deleted or archived.
- Check to make sure the page is still connected in the right place in Menus and Pages.
- If you submitted the page to workflow, remember that it may not have been published yet.
- Other possibilities include having more than one iAPPS window open in the same browser. If you want to have both the front-end of your site or Site Editor

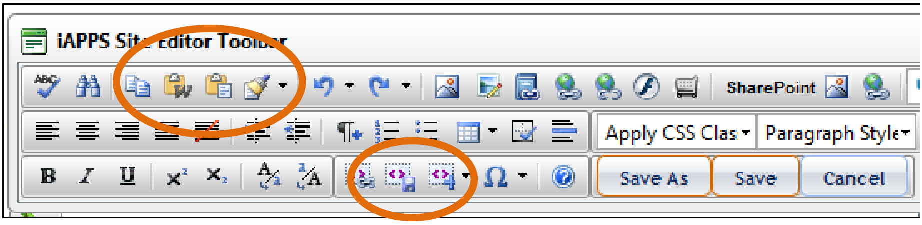
open while still viewing the Admin interface, make sure that you use two different browsers. Otherwise you may corrupt the iAPPS session, which can affect your content.

- If you tried to make content "invisible" and you still see it, you may still be in editing mode in Site Editor. Make sure that you are looking at the View as Live version of the site. Because you still need to be able to see content in order to make it visible in the future, it will still show in Site Editor, even when it is set as invisible on the site.

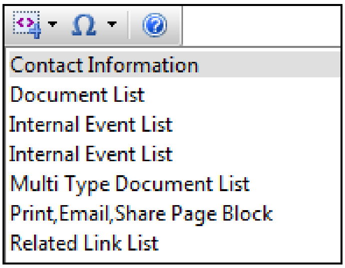
Content delays may also relate to caching. Because websites often have so much data, information drawn from databases is often pre-loaded or "cached" to improve response times for users. If you made changes to the site between "refreshing" this cache (clearing all the information and reloading it from the database) your changes may not appear. An installation Administrator can change the caching for the site. Also see the *Commerce User Manual* for more information on caching.

I am having issues with the Site Editor. The formatting is not what I expect.

Instead of pasting in content from MS Word directly, consider uploading and "cleaning" your text to strip out existing "hidden" formatting which often accompanies text from word-processors, spreadsheets or other websites. Use a button in the upper-left corner such as the "Paste as Text or "Strip Format" while placing text in the container.

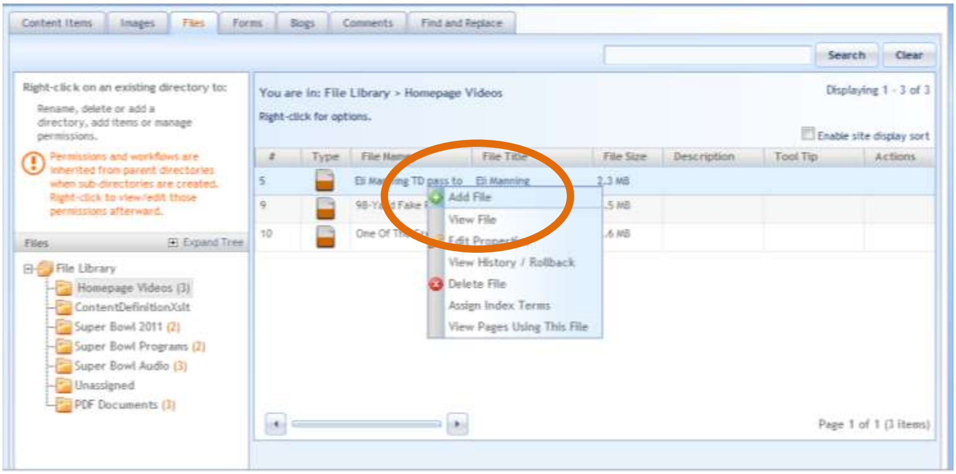


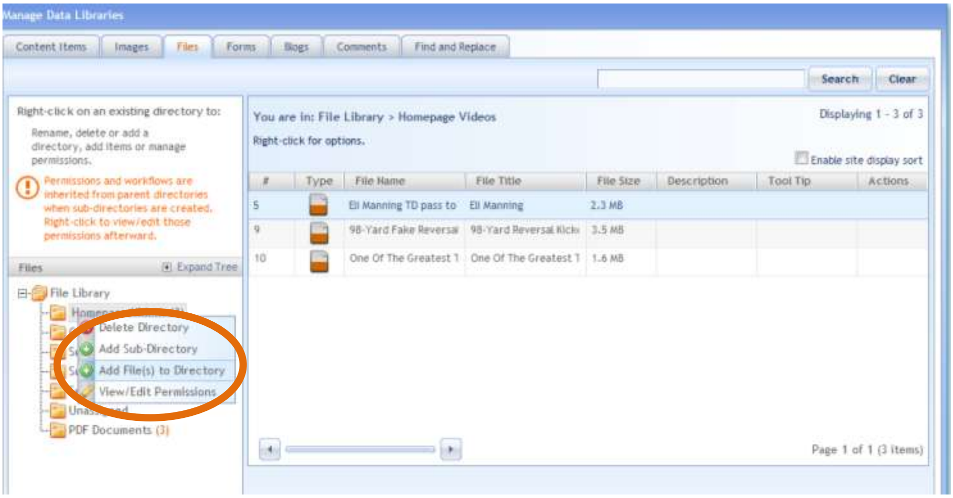
- If you know some HTML, you can use the HTML editor to make changes.
- Code Snippets make formatting easier for material you use regularly and want to appear the same way every time. You can add code snippets yourself or your developer can also add them. See Managing Content Areas for more information.



I'm unable upload multiple images or files.

You only get the multi-upload interface when clicking within the tree view of menus and pages. Otherwise, if you click within the grid view, you get a single upload option, as you can see on the screen shots below.





Why can't I right-click on all the items in my menu tree?

There might be several reasons for this. One, there might be limited permissions on the menu item or pages. Content Administrators can set limited permissions for groups or users. (See Viewing/Editing CMS User Permissions). Additionally, you can't always change material in Site Editor or in the libraries from other products in the suite. For example, Commerce product pages must be edited from Commerce, not from Content Manager. Similarly, Marketier users cannot change material on the main website from Marketier. They can only edit Marketier libraries.

How do I configure RSS feeds?

The main scheduling and set up for RSS feeds is done by a developer during installation. Once that has occurred you can simply add RSS feeds. See the MANAGING RSS CHANNELS AND FEEDS section for more detail.

My RSS Feed was working and now fails. What happened?

This is typically because a username and password needed for RSS feeds changed and the RSS configuration file needs updating. Talk to your developer.

In publishing workflow, is the time selection in the client's time zone?

No, the time for publishing and server timing is always in GMT/UMT.

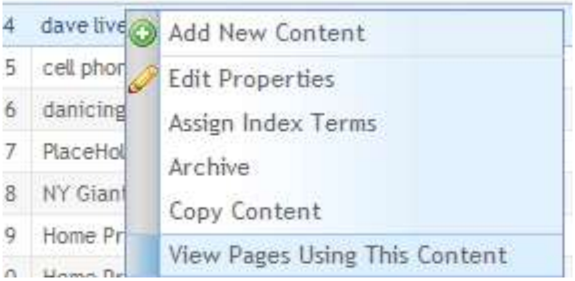
When you archive a page, do links to that page get updated throughout the site, including the Rich Text & Content Definitions?

There are a number of ways to manage links within iAPPS, and how they update depends on which you used to create the links.

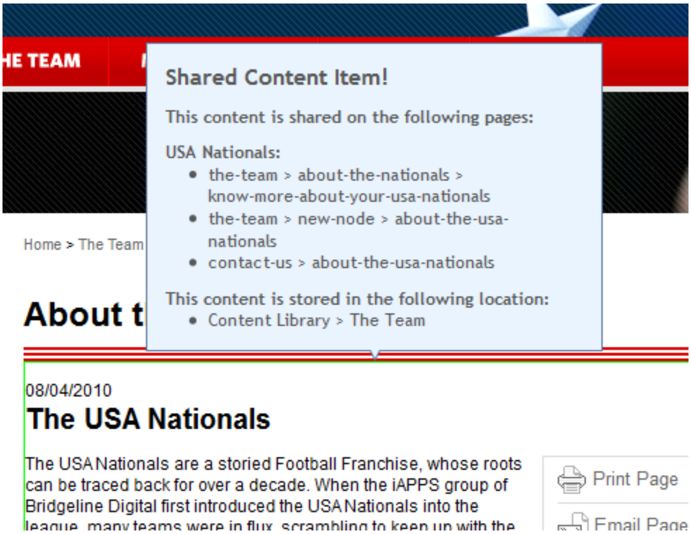
- If the page link was created using the link to library/page  feature, then the archived page link will be automatically removed.
- If the archived page is in the left nav – it will disappear from the site.
- If you set up the links yourself in a rich text area through HTML or using the hyperlink manager,  then it won't automatically update, and you'll need to ensure that it gets done.

How can I get a list of pages having a particular content or content definition?

In the Content Definition or Content Libraries, navigate to the item, right-click and select **View Pages Using This Content.**



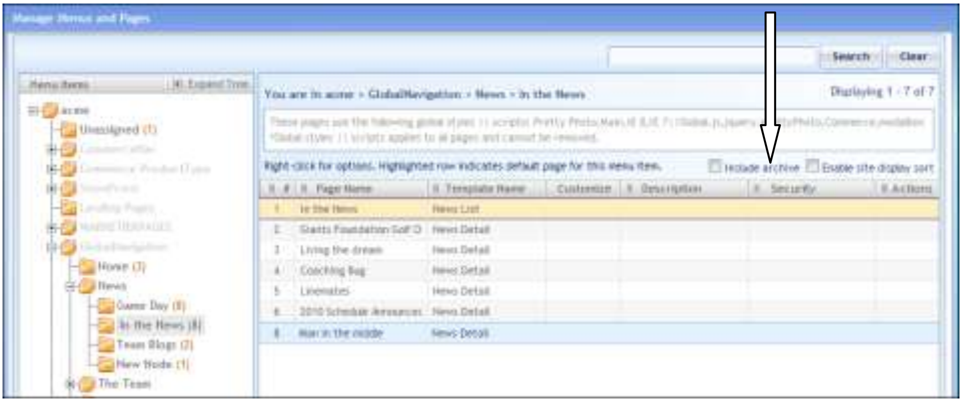
In addition, while you are in Site Editor, hovering over a content item area will show you both if the content item is shared and where it is stored.



ⓘ This feature is not always available immediately for content entered in the Site Editor Toolbar rich text areas, but sometimes needs to be updated (or indexed) overnight.

Why does Menu Items show a different number of pages present than the Grid?

You can get a different number because the Archived items are counted in one and not the other. You can see archived material by checking the “Include Archive” box just above the column headings.



Content list without and with archived material

#	Page Name	Template Name	Customize	Description	Security	Actions
1	In the News	News List				
2	Giants Foundation Golf O	News Detail				
3	Living the dream	News Detail				
4	Coaching Bug	News Detail				
5	Linemates	News Detail				
6	2010 Schedule Announcec	News Detail				
7	And so it begins.....	News Detail				
8	Man in the middle	News Detail				

How do I delete content items?

You cannot delete content items through the iAPPS user interface. Every version of a content item is saved for compliance reasons. If you do not need an item anymore you can archive it, or if absolutely necessary it could be removed from the database by a developer.

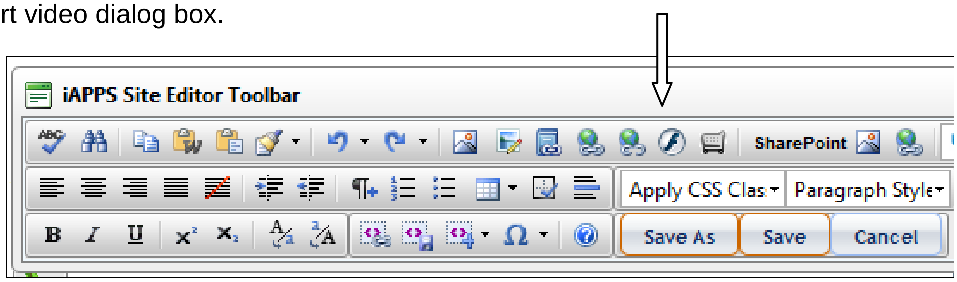
Someone just left my team. How do I make sure they don't have access iAPPS?

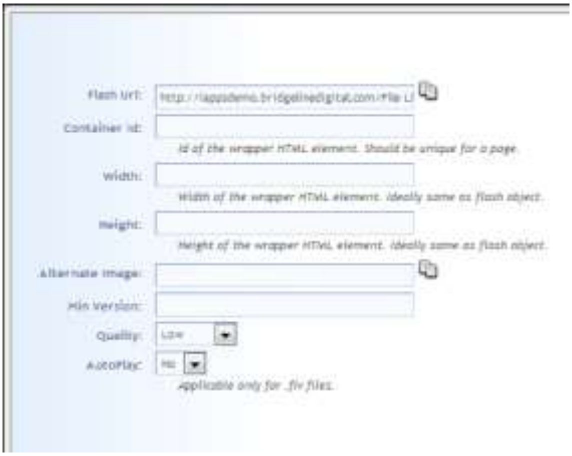
You can either simply remove them as a user or change their password if they have a generic login (Marketingadmin vs jlastname). (Generally, it is recommended that all users have a personalized login such as first initial and last name). A site administrator can change a user's password in **Administration → CMS Users.** The User

Administration screen will open with the **Manage CMS Users** tab active. Simply search for the pertinent user, then enter a new password into the External Password Field and the Confirm Password Field. Scroll down and click “Save Changes.” To delete the user, follow the process in the Modifying / Deleting an Existing CMS User section. **Note**: If you do delete a user, make sure you first transfer any workflow responsibilities they may have to another user.

How do I embed a video in my content?

You can use the standard iAPPS toolbar to embed flash video into a rich text area container as you might any other file in the libraries. In any rich text area, simply right-click, select **Edit Text** and choose the “Insert Flash Button” in the toolbar to bring up the insert video dialog box.





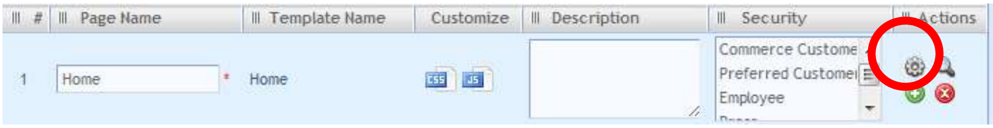
- If you are doing a lot of short videos, you should consider having a dedicated video/media template. That would allow the videos to be uploaded to the site and added to a page through a content definition.

- You can also use an external media player. Customers who use larger/longer videos or manage them for multiple locations often employ an external media provider like Brightcove, Vimeo or Youtube. In this case, it is simple to paste javascript from the vendor into the HTML view of the rich text editor.

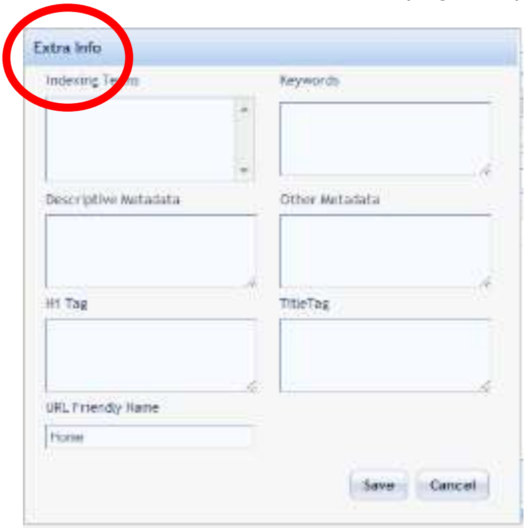
Can I override the default meta tags being rendered from iAPPS?

The default values are determined in the development process, and can be changed. You can also override them on a per page basis by using Page Properties. There are two ways to access the Page Properties

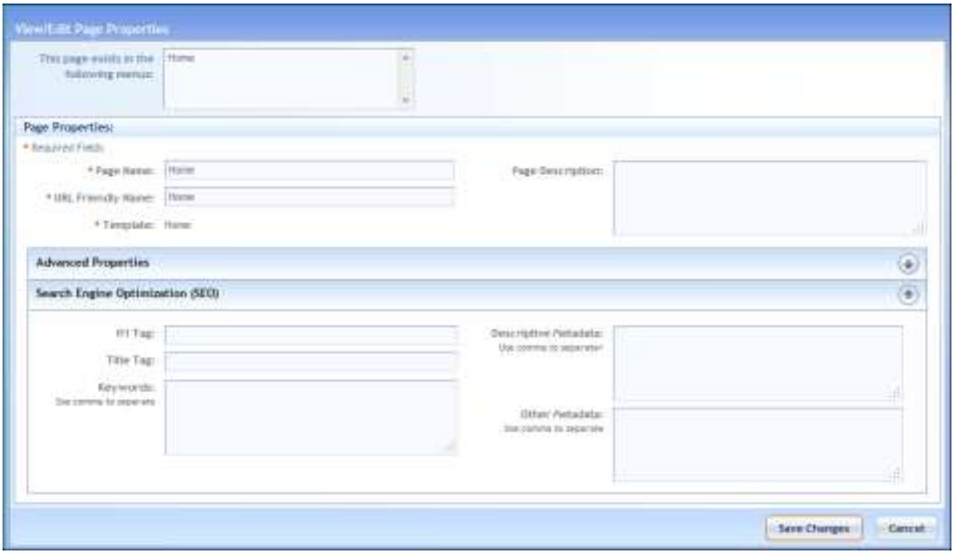
In **Libraries → Menus and pages,** navigate to the page you want to edit. Right-click and select **Edit Properties.**



Click on the gear / wheel to fill in the ***Extra Info*** page Properties.



Alternatively while in Site Editor, on menu pulldown, select **Page Properties → View/Edit Properties** to bring up a similar dialog.



These dialogs allow you to change the friendly URL name, the page name, title and H1 tags and add SEO Metadata.

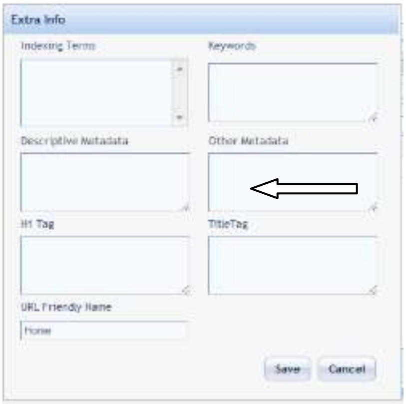
- To avoid numerous changes, keep SEO in mind while naming your menu items and pages. iAPPS automatically creates friendly URLs from your naming structure. Keep menu item and page names short and easy-to-remember.
- You can also talk to your development team about custom SEO logic SEO logic if you need specific behavior in the site without editing every page.

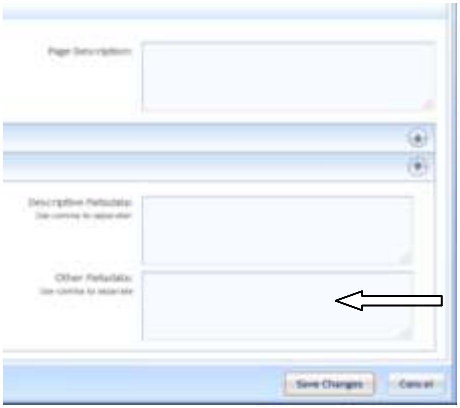
Do I need to consider SEO if I have two pages with the same content in two different places on my site?

Part of the usefulness of a Web CMS system such as iAPPS is the ability to reuse content. However, if you do have the same content in too many places, it could hurt your credibility with the search engines.

- There are ways to prevent repurposed content from affecting your site's search equity. One method is to use something called a canonical metatag. This tag simply tells search engines that you realize content is being used in multiple places, and that is not intended to "trick" the engines in anyway. The tag gives a reference to one preferred page as the primary source of content.
- To insert a metatag, bring up the **Page Properties** in Site Editor or through **Menus and Pages** (as shown in the question above). In the field labeled "Other Metadata," insert the tag: <link rel="canonical"

href="http://www.example.com/product.php?item=swedish-fish" /> Replace the sample URL above with your preferred URL for the shared content. For more information see: http://googlewebmastercentral.blogspot.com/2009/02/specify-your-canonical.html.





Fine tuning your SEO can be complicated. See the *iAPPS User Scenario Manual* for more hints or contact Bridgeline's Digital Strategy Group about how to optimize your site.

I want to change the name of a menu item or a page on my site. Is there anything I need to worry about with SEO?

When you change a page name in iAPPS, iAPPS will automatically redirect pages. If you change a menu name or move a page to a different menu, you might want to make a request to your developer to add the URLs to the .xml redirect file. For more on 301 redirects, see the *iAPPS Content Manager Developer Guide.* You should also change any external links pointing to the page as well.

I want to change the URL attached to a page. Do I do that in the Menu area or in the page's SEO settings area?

There are two ways to do this.

- If you change the name of a page or a menu item under Menus and Pages, this will be automatically reflected in the page's URL.
- If the change you want is just at the page level, then you can simply change the Page title in the Page Properties.

- If your preferred URL is at the menu level, then you should change the menu name in Menus and Pages. Generally, the menu level is the best bet, but it would depend on how your site is structured.
- Remember that you can have a shorter friendly URL without changing the name of a page. Also, while the H1 Heading default is the page name, you can also change that in the Page Properties.

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