USER MANUAL

Evoq Content 7.2

Table of Contents

About this Manual. 3

About Evoq Content. 4

Web Content Management. 5

Site Management 202

Performance and Scalability 208

Security. 266

Mobile Devices Support. 279

Support and Documentation. 290

About DNN Corp. 312

Index. 313

About this Manual

This manual has been written to provide details on using the features exclusive to Evoq Content 7.2.1. This manual is not intended to be a complete 'how to' guide to using the DNN Platform. Separate manuals on using the DNN Platform can be downloaded from http://www.dnnsoftware.com/Community/Download/Manuals.

About Evoq Content

Your web site is one of your most valuable assets. Evoq Content, formerly known as DotNetNuke Professional Edition, is a business solution that helps bring your website to life with captivating content and engaging interactions. Focusing upon current industry needs, Evoq Content delivers advanced yet simple tools to enhance and extend the value your web presence including mobile devices support, fine grained security to control access to view and manage site content, and powerful searching tools that include the ability to allow site users to search the content of online files and documents.

Evoq Content provides content management and workflow tools suited to non-technical users that can be customize to suit your business processes. Our online editing tools include an invaluable autosave feature that prevents work from being lost due to real world problems, such as your internet connection is lost. Another great productivity tool is the ability to share content across multiple websites. This minimizes the risk of out dated content and reduces the time required to update your various online resources.

Our Evoq Content customers not only enjoy the advantages of a powerful and streamlined solution for all business stakeholders, they are provided with a wide range of support and documentation to ensure they receive the maximum benefits from this great product.

Web Content Management

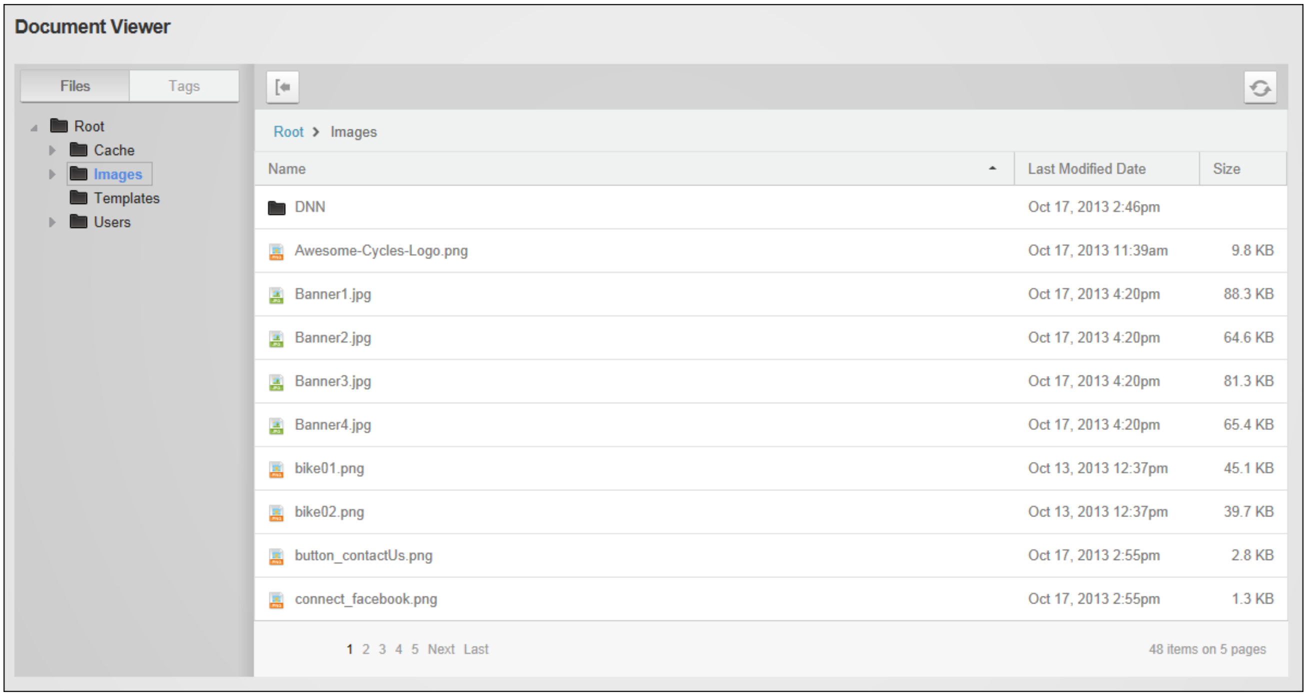
This section details the following content management tools of Evoq Content.

- **Document Management**: Document Viewer allows authorized users to view navigate, view and download site files that are maintained using Admin >File Management.
- **File Management**: Digital Asset Management Pro is a central repository for uploading and manage site files. Site files can either be located within the site's database or one or more cloud services can be utilized. File tagging, workflow and versioning are also available.
- **Content Management**: Distributed content authorizing is simple to configure and use in Evoq Content. HTML Pro allows you to create customized workflows and My Modules allows users to easily identify the content they are responsible for.
- **Commerce**: Sell products, services and access to content on the site. Commerce allows you to process payments and assign roles to customers.
- **Cross Site Module Sharing**: Share static or update-able content across multiple sites.
- **Site Searches**: Search all site content including the content of files.
- **User Account Management**: Impersonate different site users to mimic their experience and review their site access.

Document Viewer

About the Document Viewer

The Document Viewer, which replaces the Document Library in Evoq Content 7.2+, allows authorized users to view navigate, view and download site files that are maintained using Admin >File Management.



Document Library Migration

During the upgrade process all Document Library instances, with the exception of those added to Host and Admin pages, will be replaced by Document Viewer instances. The replacement Document Viewers will keep all permissions, properties and layout from their respective Document Library as much as possible.

Use Cases

When the Document Library module is filtered by a folder

- If the module has filled the setting “Local Settings > Navigation Tree Options > Restrict Tree to 1 Folder”, then the Document Viewer will have filled the property “Filter View Management > Filtered by Folder” with the same folder
- Else, if the module has filled the setting “Global Settings > File System Options > Root Folder”, then the Document Viewer will have filled the property “Filter View Management > Filtered by Folder” with the same folder
- In any case, if the module has checked the property “Local Settings > Navigation Tree Options > Hide Tree (Flat View)”, then the Document Viewer will have checked the property “Filter View Management > Filtered by Folder > “Include Subfolders (Files only)””

When the Document Library module is filtered by a category

- If the module has filled the setting “Local Settings > Navigation Tree Options > Restrict Tree to 1 Category”, then the Document Viewer will have filled the property “Filter View Management > Filtered by Tag” with a tag equivalent to the selected category
- The Upgrade process also creates a tag for each category existing in Document Library

When the Document Library module has checked the Hide Tree property

This setting only will make sense in Document Viewer when content is filtered by a folder because when the content is filtered by a tag, the left pane is always hidden.

- Therefore, if the Document Library module has checked the property “Local Settings > Navigation Tree Options > Hide Tree (Flat View)”, then the Document Viewer will have checked the property “Filter View Management > Filtered by Folder > “Include Subfolders (Files only)””

When the Document Library module has custom column settings

In this case, the Document Viewer also will show the same columns in the same order. However, in Document Viewer some columns have a different name. Below is shown a correspondence table between Document Library columns and Document Viewer columns.

Document Library Column	Document Viewer Column
Name	Name
Description	Title
Size	Size
Uploaded	Created Date
Modified	Last Modified Date

When the Document Library module has a custom Items Per Page value

- If the module has a custom “Local Settings > Document Grid Options > Items Per Page” value, then the Document Viewer will have assigned the same value on “Grid Appearance > Items Per Page”

The values set is the same in both modules – 10, 25, 50 and 100. Therefore, the result will be exactly the same

When the Document Library module has unchecked the Display Navigation setting

- If the module has unchecked the "Local Settings > Document Grid Options > Display Navigation" property, then the Document Viewer will have filled the "Grid Appearance > Items Per Page" property with the "All" option

When a user has file subscriptions created

- If the user has files subscriptions created in Document Library, then the Digital Assets Management module will create the same subscriptions in the general File Subscription mechanism, introduced in version 7.2.
- The Document Viewer doesn't show anything related with file subscriptions. Subscriptions will be shown in DAM

When a user has folder subscriptions created

- If the user has folder subscriptions created in Document Library, then the Digital Assets Management module will create the same subscriptions in the general File Subscription mechanism, introduced in version 7.2.
- The Document Viewer doesn't show anything related with folder subscriptions. Subscriptions will be shown in DAM

Navigating to and Selecting Folders

How to navigate to and select a folder using the Document Viewer. All users can perform this task.

- **To view a subfolder**: Click the **Open** button beside a folder to view its subfolders.
- **To hide a subfolder**: Click the **Close** button beside a folder to close it and hide its subfolders.
- **To select a folder**: Click on the folder name in the navigation tree. This highlight the selected folder name and displays the associated files in the Files Window.

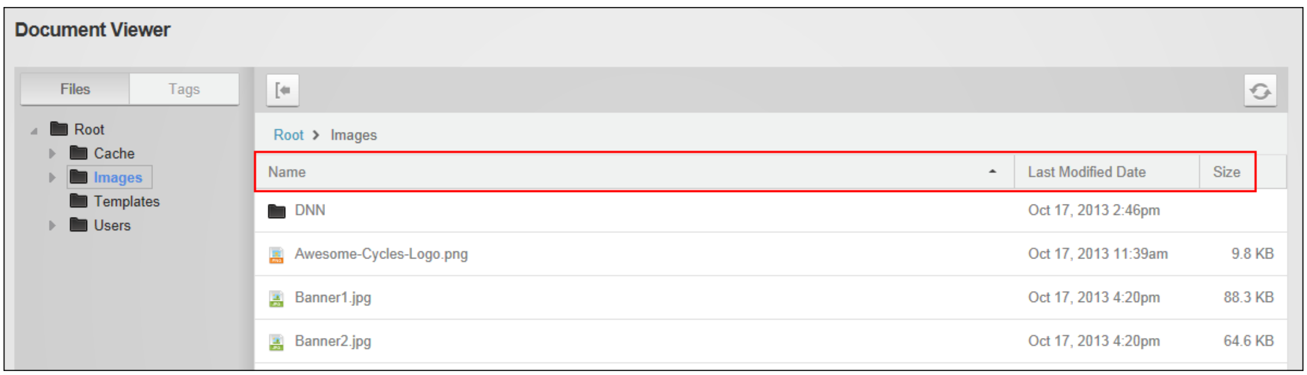
Navigating to Files

The Document Viewer typically displays the first ten (10) files within the selected folder inside the Files Window. When there are more than ten (10) files within the selected folder, a list of linked page numbers are displayed below the files allowing users to navigate to the other files. The total number of items and number of pages of files is also displayed. E.g. 48 items on 5 pages.

Setting Sort Order of Files

The files displayed in the Files Window of the Digital Asset Management Pro module can be sorted alpha-numerically in either ascending or descending order by Name, Date Modified or Size column. The default sort order is in ascending order by file name (Name column) by default. All users can perform this task.

1. Go to the Document Viewer.
2. In the Title Bar of the Files Window, click on a column name to sort files by that column. Typically the Name, Last Date Modified and Size columns are displayed but other columns may be available. This sorts the files in the selected column in ascending order and displays the **Sorted Asc** icon beside the selected column.
3. **Optional.** Click the same column title a second time to reorder files in descending order. The **Sorted Des** icon will then be displayed beside the selected column.

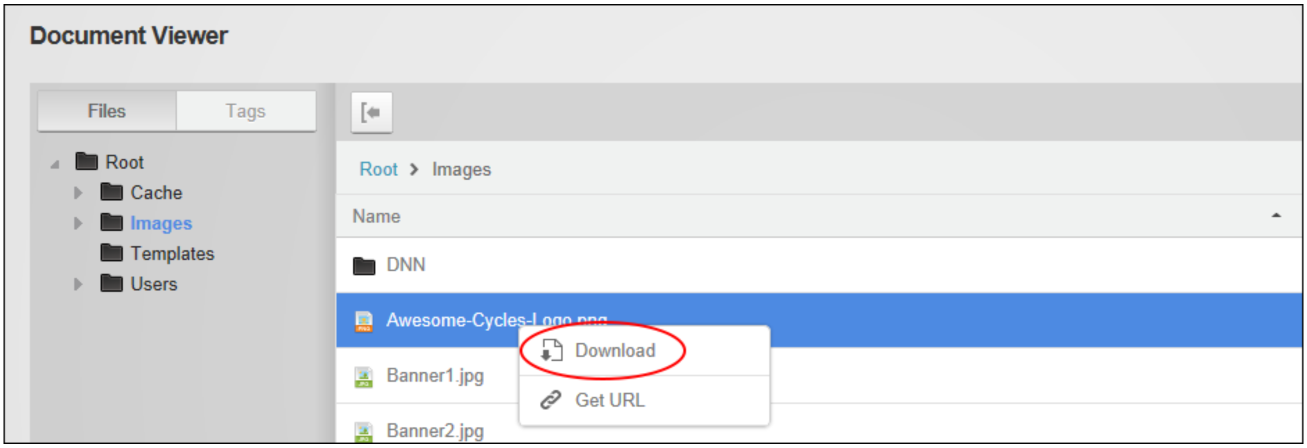


Files ordered by file size in ascending order

Downloading a File

How to download a file from the Document Viewer. All users can perform this task.

1. Go to the Document Viewer.
2. Navigate to and select the folder containing the file to be downloaded. See "Navigating to and Selecting Folders"
3. Click on the linked file name - OR - Right click on the file row and click the **Download** button from the drop down menu.

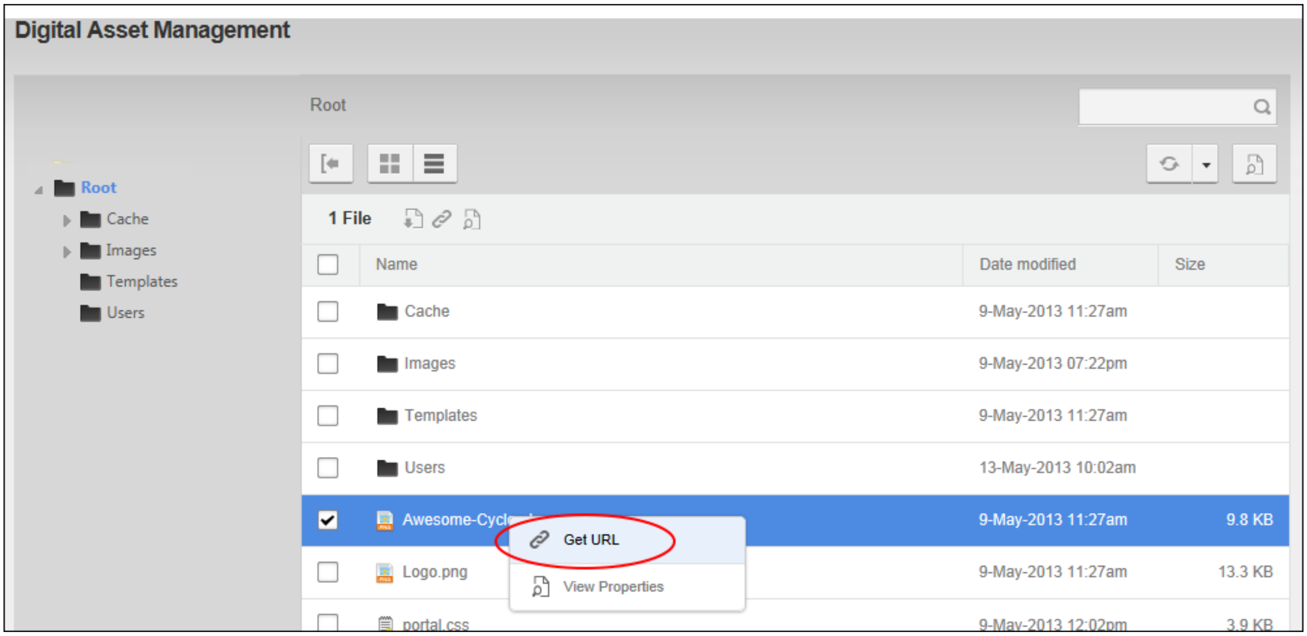


4. Save the file to your computer.

Getting a File URL

How to obtain the full URL path to a file using the Document Viewer. The full URL path allows the user to share a link to the file in a number of way such as sending an email that includes a link to the file, copying the URL into a Word document (or other file), or copying the URL and pasting it in the HTML Pro module. All users can perform this task.

1. Go to the Document Viewer.
2. Navigate to and select the folder containing the file to be downloaded. See "Navigating to and Selecting Folders"
3. In the File Window, right click on the name of the file and select **Get URL** from the drop down menu.



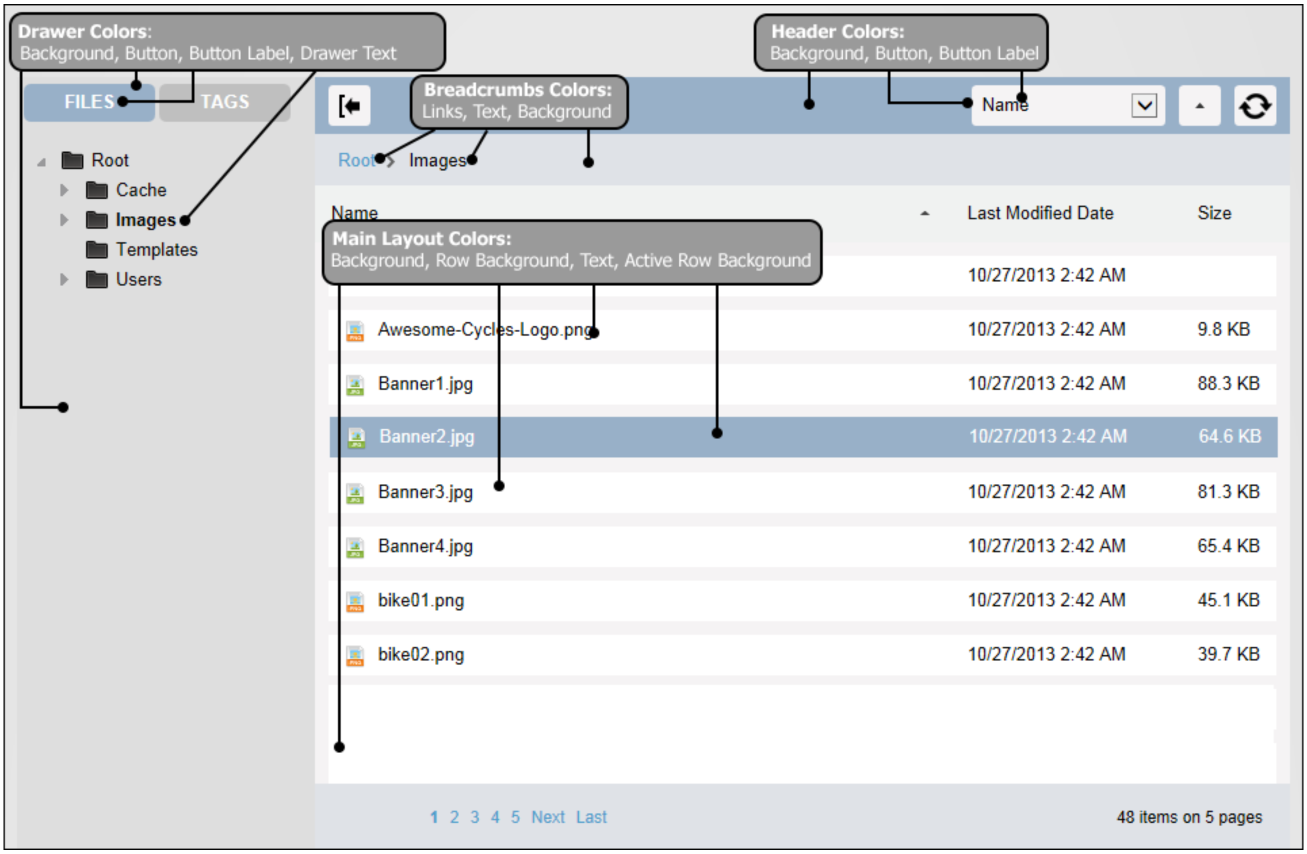
4. In the **File URL Is** text box, click on the URL and then press CTRL + C to copy - OR - Right click on the URL path and copy.
5. Click the **Close** button.

Settings

Configuring the Document Viewer Settings

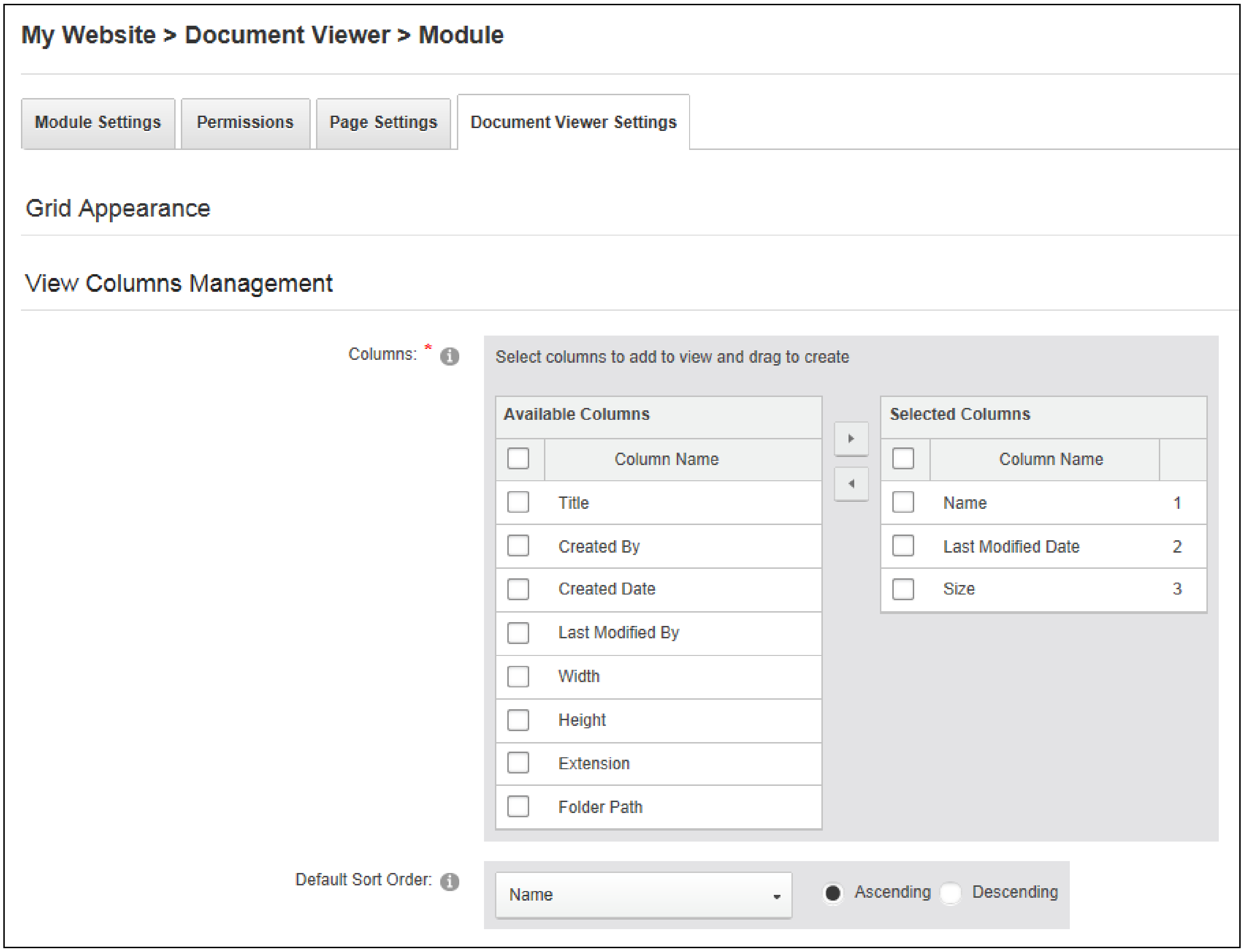
How to configure the settings that apply to a single instance of the Document Viewer.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **Grid Appearance** tab.
    1. At **Layout**, choose from these options.
        - Select **Default Template** to use the pre-configured template.
        - Select **Customizable Template** to customize the colors used on this instance of the Document Viewer. The below diagram indicates the location of each color setting. This template also includes minor visual changes to the Files and Tags buttons. Note: You cannot manually enter a hexadecimal value (e.g. #dedede) on the default Web Palette tab of Color Picker popup. Instead you must select one of the other tabs (either RGB Sliders, HSB, or HSV) that are displayed at the base of Color Picker and then enter or paste in the value.

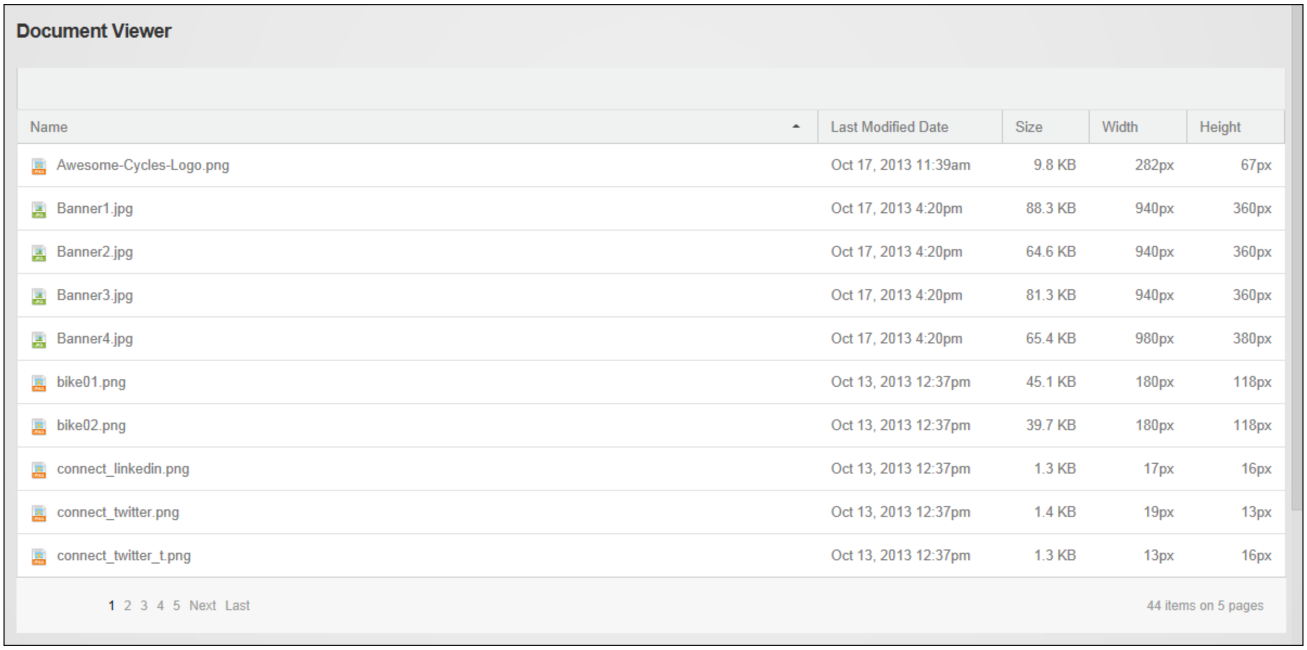


2. At **Items Per Page**, select the number of items displayed at one time. If there are more items available than set here, then a paging control will be added to the base of the Document Viewer allowing users to access additional items.

3. Select the **View Columns Management** tab to modify the columns displayed in the Document Viewer.
   1. At Columns, perform any of the following:
      - To add columns, mark ☑ the check box beside one or more columns in the Available columns list and then click the **Add** button to add them to the Selected Columns list.
      - To delete columns, mark ☑ the check box beside one or more columns in the Selected columns list and then click the **Remove** button.
      - To reorder columns, click and hold on a row in the Selected columns list and then drag and drop the column in the new position.
   2. At **Default Sort Order**, select the column name that files will be sorted by in either Ascending or Descending order.



4. Select the **Filter View Management** tab to add or remove a filter that will limit the files displayed in the Document Viewer.
   - **Not Set**: Select to remove all filters and display all folders the user is authorized to browse.
   - **Filter by Folder**: Select to only display the files within the selected folder and then select the folder name from the drop down list.
     - **Exclude Subfolders**: Select to only display files within the selected folder and hide all subfolders and files within those subfolders.
     - **Include Subfolders (Files Only)**: Select to display all files within the selected folder and its subfolders in one single list.



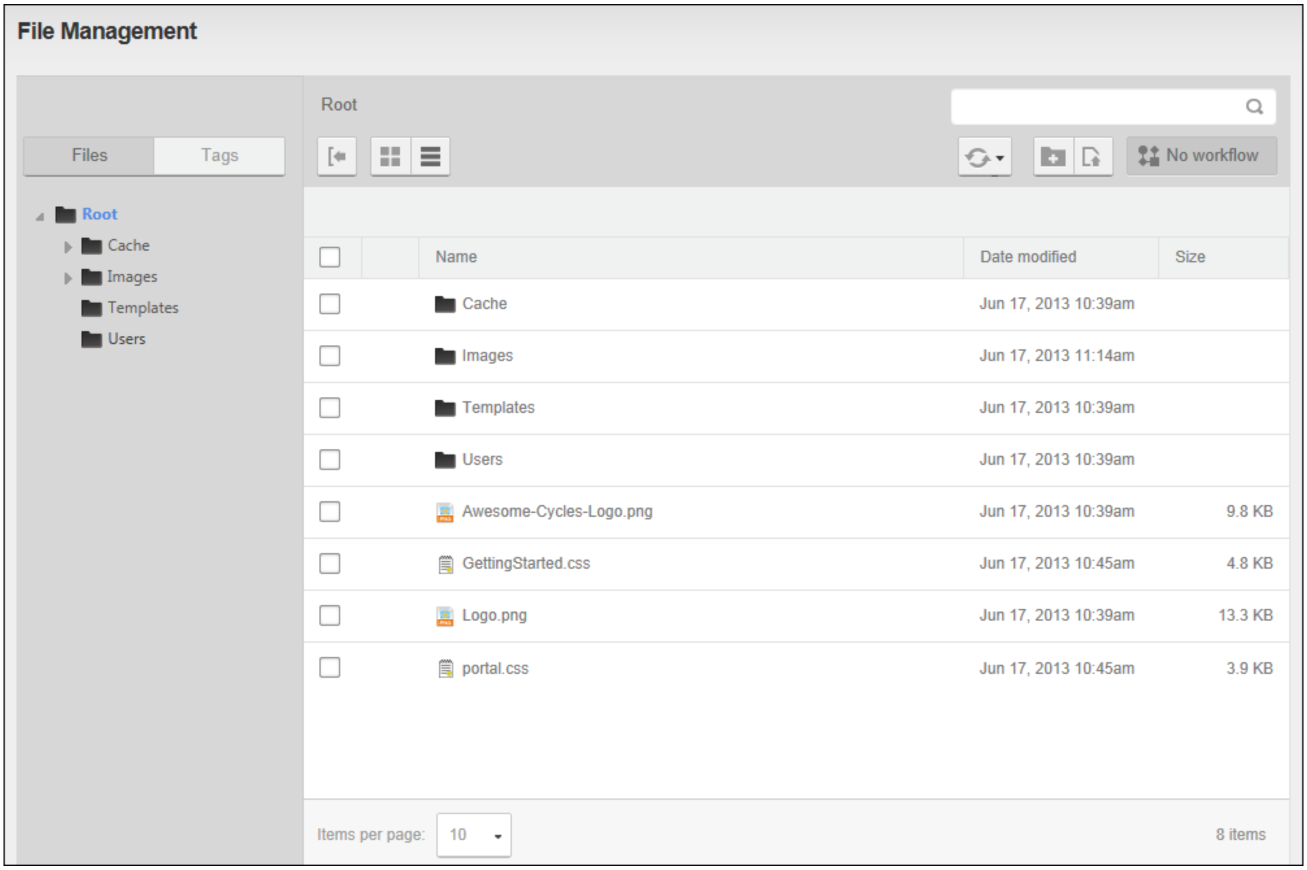
  - **Include Subfolders (Show folder structure)**: Select to display the selected folder and any subfolders on the page, allows users to navigate to the parent or subfolders.
- **Filter By Tags**: Select to filter the files by one or more tags and then enter the required tags. Only files that contain all of the tags entered here will be displayed.

5. Click the **Update** button.

File Management

About Digital Asset Management

Digital Asset Management Pro allows users to manage site files. This Admin module is located on the Admin > Common Settings > **File Management** page and can be added to additional pages.



Digital Asset Management Module - Evoq Content and Evoq Content Enterprise

Getting Familiar with Digital Asset Management

Here's an overview of the different areas of the Digital Asset Management / Digital Asset Management Pro modules:

Folder List: The list of the folders where files are stored is displayed down the left hand side of the module. Clicking on a folder name displays the items within that folder in the File Window. Right clicking on a folder name opens a drop down menu of actions that can be performed by the user against that folder such as view properties and add sub-folder.

Tag List: Clicking on the Tags button in the top left corner of the module displays the list of the tags that have been associated with files below. Clicking on a tag displays the related files in the File Window.

Toolbar: The toolbar displays the address of the current folder and allows users to create subfolders, and manage and upload files. Here's a complete list of the available tools:

- **Toggle**: Open or close the File or Tag List.
- **Icons**: Display the items within the file window as icons.
- **List**: Display the items within the file window in a list. This is the default view.
- **Refresh**: Refresh or sync the items within the current folder.
- **Create New Folder**: Create a subfolder of the current folder.
- **Upload Files**: Upload files to the current folder.
- **No Workflow/Content Approval**: Indicates whether workflow has been enabled for the currently selected folder. Workflow is disabled by default.

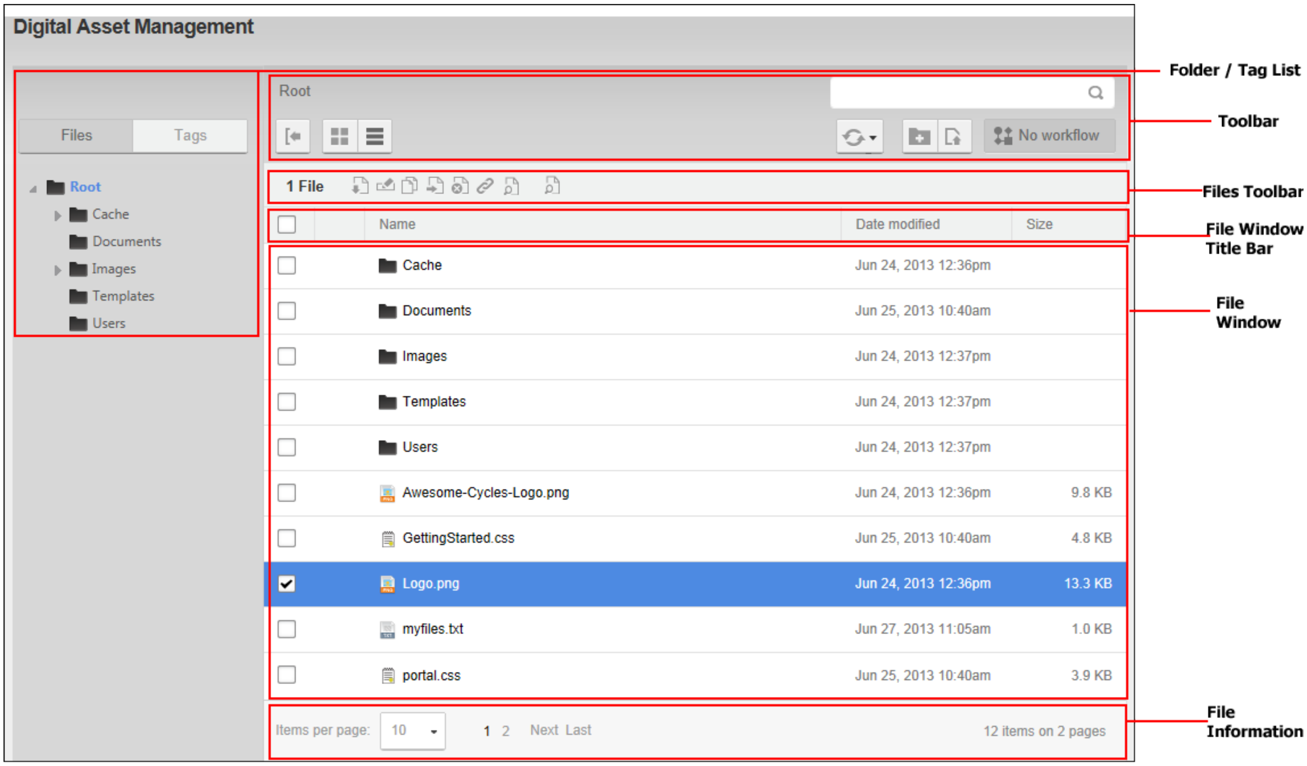
Files Toolbar: This context sensitive toolbar only displays when one or more items in the file window is selected. Here's a complete list of the available tools:

- **Download**: Download the selected file.
- **Rename**: Rename the selected file or folder.
- **Copy**: Download the selected file(s).
- **Move**: Move the selected file(s).
- **Delete**: Delete the selected files or folders.
- **Get URL**: Get the URL for the selected file.
- **View Properties**: View the properties of the selected file or folder.
- **Subscribe / Unsubscribe**: Subscribe to receive notification of changes to selected files or folders.

File Window Title Bar: Displays the column names of the Files window. Clicking on a column name will sort the files by that column. A **Select All** check box located to the left of all columns names allows users to select all of the folders and files on the current page.

File Window: This window lists all of the subfolders and files within the selected folder. A **Locked** icon is displayed beside any file that is locked from editing, either because it is not yet published or is in the workflow process.

File Information: Located below the Files Window, this bar allows users to navigate to other pages of files, change the page size and view the total number of items in the current folder.

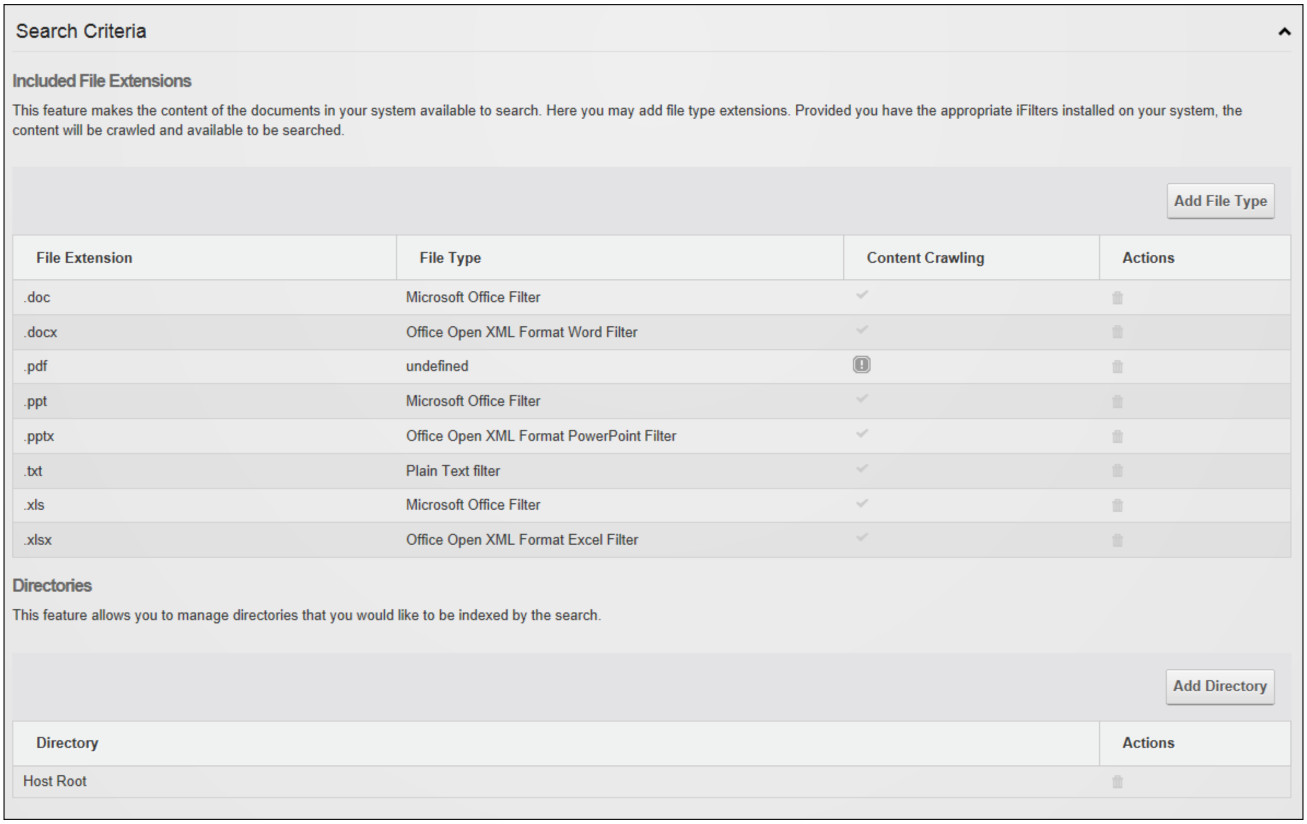


DAM - Evoq Content and Evoq Content Enterprise

Configuring Search Criteria and Directories

The Search Criteria section, located under Host > Advanced Settings, allows SuperUsers to choose the types of Host files that will be indexed by the file crawler and set the Directories of the Host > File Management page that will be crawled. The content of the selected file types will then be searchable using the search tool on the Host > File Management page.

1. Navigate to Host > ⚙ **Host Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Search Criteria** section.
4. For details on adding and manage file types and directories, follow the same steps as for adding and managing Search Admin. See "Adding File Extensions to Searches" and See "Adding Directories to the Index".

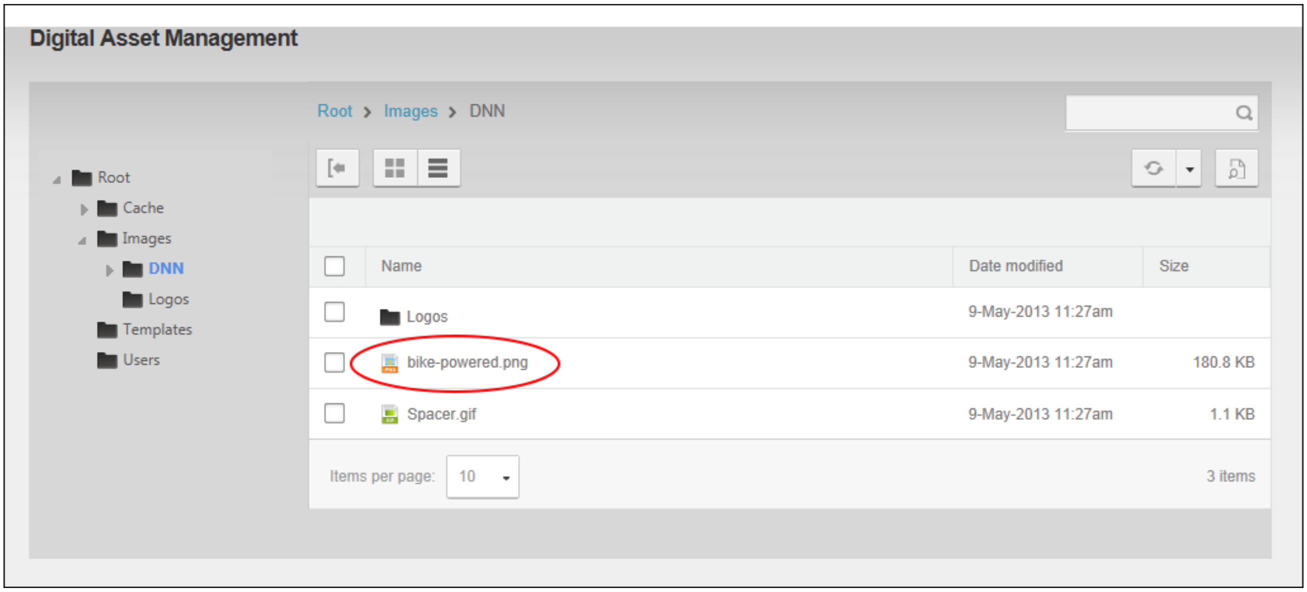


All Users

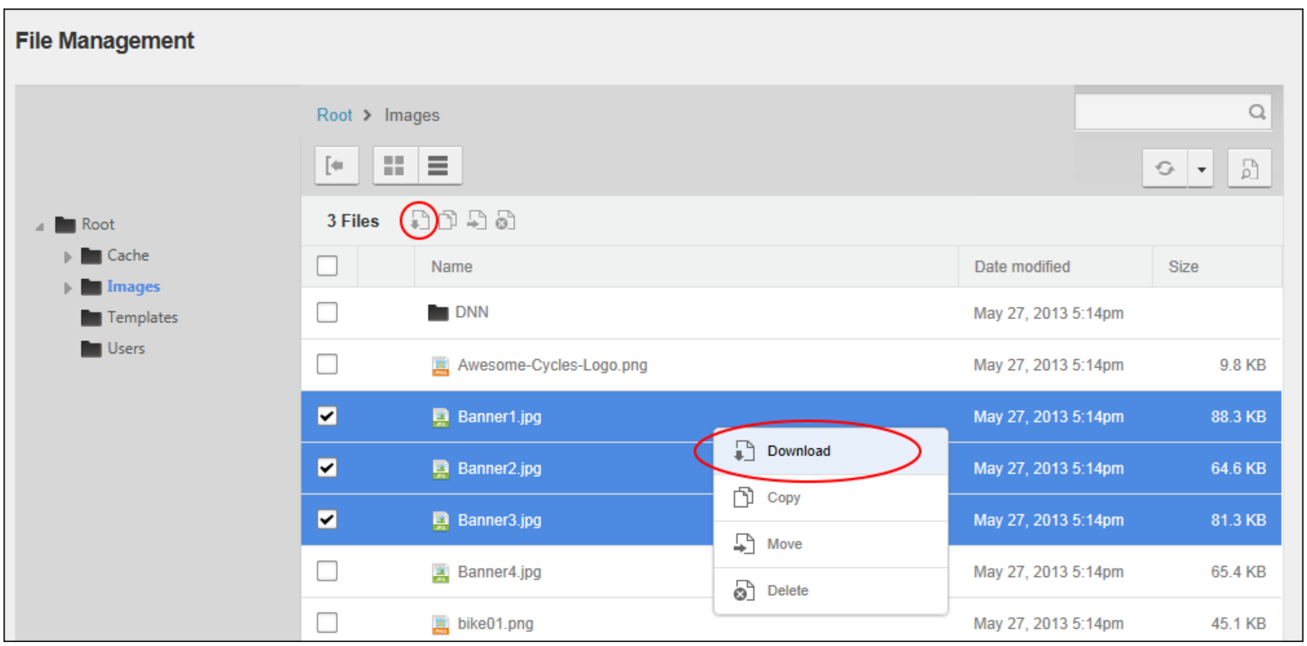
Downloading one or more Files

How to download one or more files from the Digital Asset Management Pro module. All users can perform this task.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder containing the file to be downloaded. See "Navigating to and Selecting Folders"
3. Select and download files using one or these methods:
   - To download a single file, either click the linked file name - OR - Right click on the file row and click the **Download** button from the drop down menu - OR - mark the check box beside the file and then click the **Download** button in the Files Window Tool Bar.



- To download multiple files, mark the check box beside each file and then either click the **Download** button in the Files Window Tool Bar or right click on one of the selected file rows and then click the **Download** button from the drop down menu. Selected files will be saved as a single zipped file.

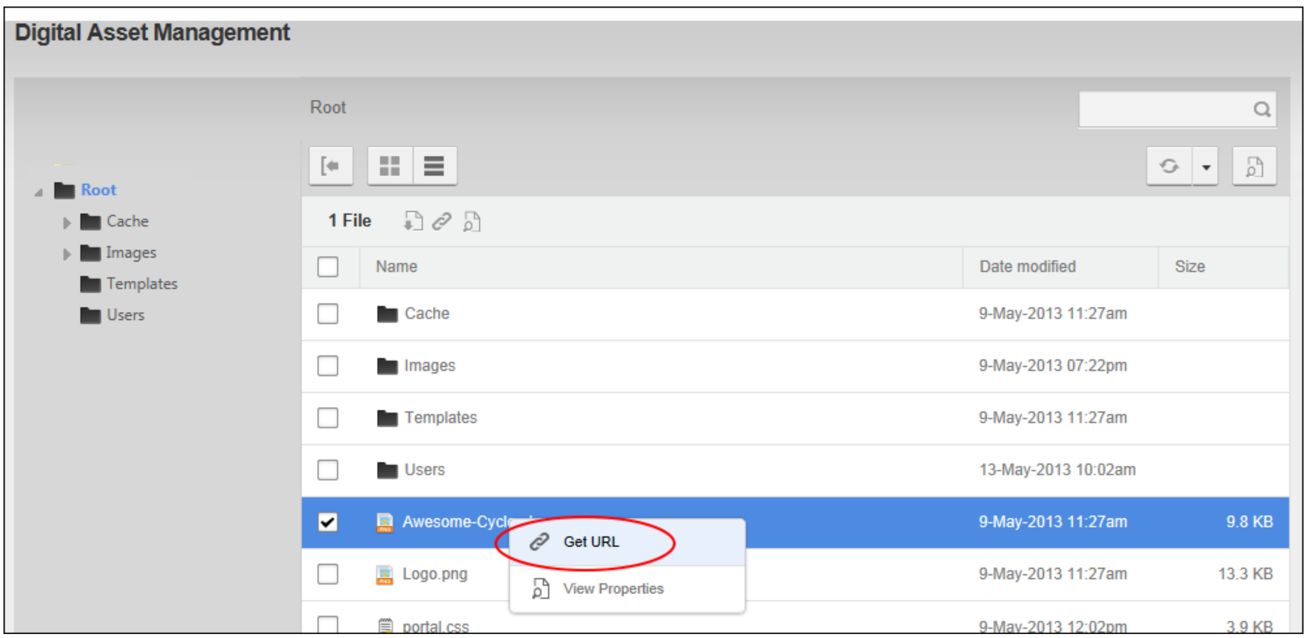


4. Save the file to your computer.

Getting a File URL

How to obtain the full URL path to a file within the Digital Asset Management module. The full URL path allows the user to share a link to the file in a number of way such as sending an email that includes a link to the file, copying the URL into a Word document (or other file), or copying the URL and pasting it in an HTML / HTML Pro module. All users can perform this task.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management / Digital Asset Management Pro module.
2. Navigate to and select the folder where the file is located. See "Navigating to and Selecting Folders"
3. In the File Window, perform one of the following options:
   - Right click on the name of the file and select **Get URL** from the drop down menu
   - Select a file and then click the **Get URL** button in the Files Window Tool Bar.



4. In the **File URL Is** text box, click on the URL and then press CTRL + C to copy - OR - Right click on the URL path and copy.
5. Click the **Close** button.

Navigating to and Selecting Folders

How to navigate to and select a folder using the Digital Asset Management Pro module. All users can perform this task.

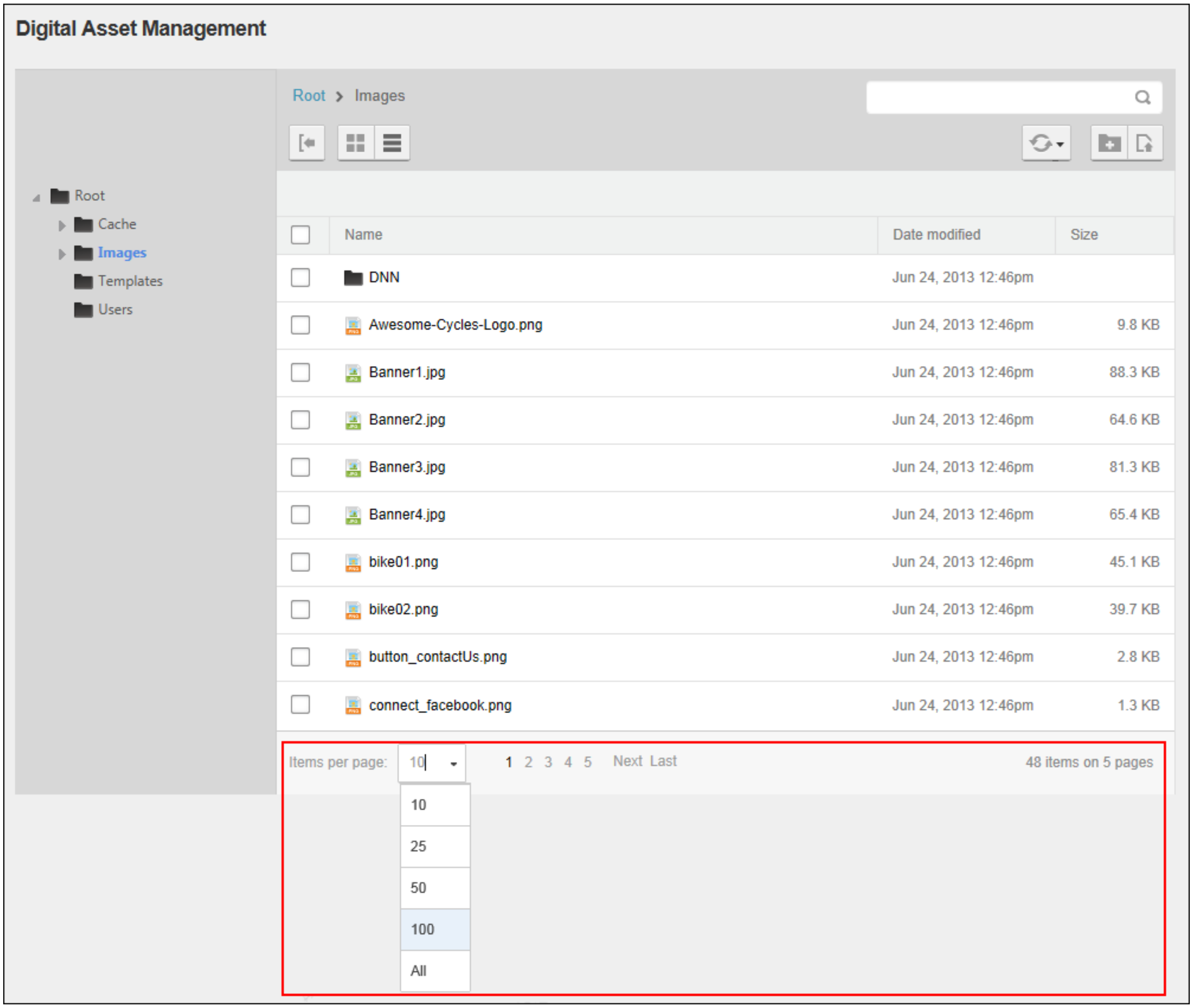
- **To view a subfolder**: Click the **Open** button beside a folder to view its subfolders.
- **To hide a subfolder**: Click the **Close** button beside a folder to close it and hide its subfolders.
- **To select a folder**: Click on the folder name in the navigation tree. This highlight the selected folder name and displays the associated files in the Files Window. If you navigate away from DAM and then return to the page, the last folder that you selected will be displayed.

Navigating to Files

The Digital Asset Management Pro module displays the first ten (10) files within the selected folder inside the Files Window. When there are more than ten (10) files, the following options are displayed on the Files Navigation Bar located at the base of the module, allowing you to navigate to the additional files as well as change the default number of files displayed. All users can perform this task.

- **Items per Page**: Select the number of files (10, 25, 50, 100 or All) to be displayed in the Files Window. This setting will be retained when a new folder is selected, however it will default back to ten (10) files whenever the Digital Asset Management module is refreshed.
- **Page Links**: When there is more than one page of files within the selected folder, a list of linked page numbers enables users to navigate to other pages.
- **Total Items**: The total number of items and whether the items are displayed on multiple pages. E.g. 48 items on 5 pages.

> Tip: When performing a task such as delete or copy against multiple files, you can select to view up to 100 file or All files on one page. This allows you to perform the task on all those files at one time.



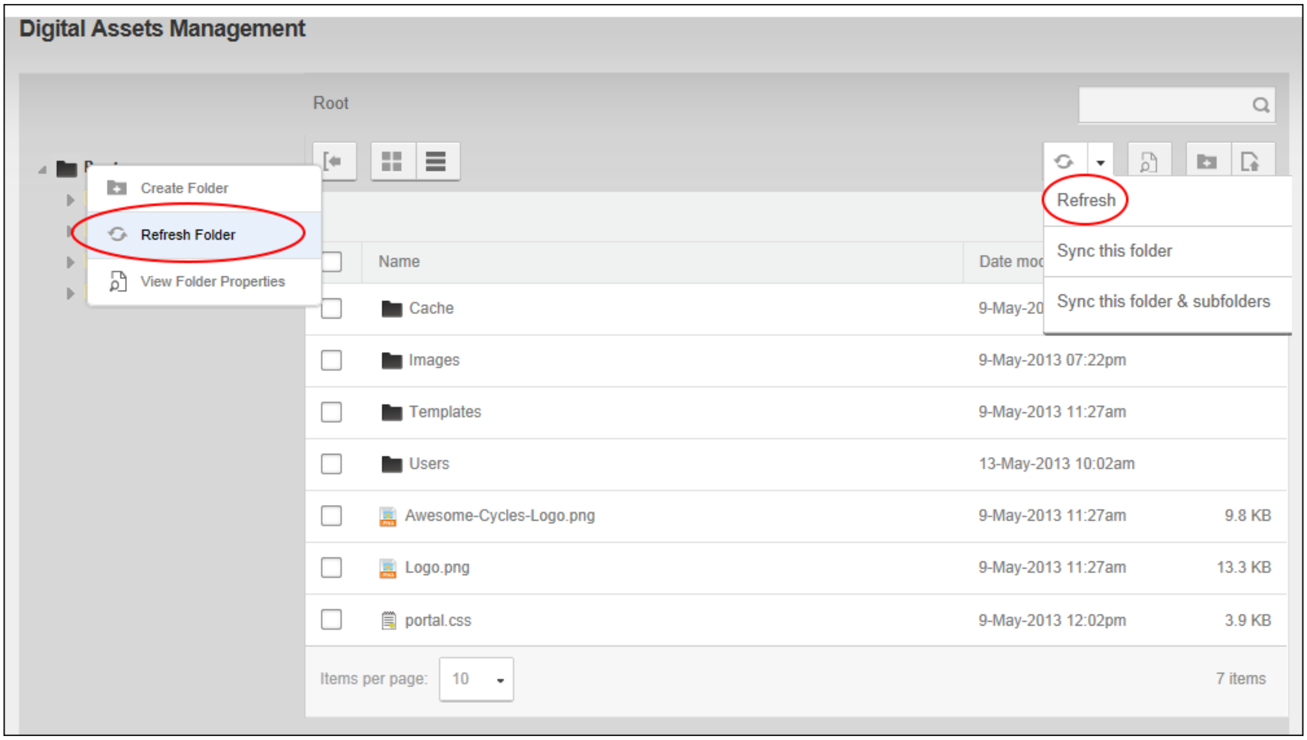
Selecting Items Per Page

Refreshing All Files within a Folder

How to refresh the files within a selected folder of the Digital Asset Management Pro module so the file information in the database matches the files on the server. This may be required if files have been uploaded via FTP. All users can perform this task.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the required folder. See "Navigating to and Selecting Folders"

3. Right click on the folder name and select **Refresh Folder** - OR - Click the **Refresh** button in the toolbar and then select **Refresh** from the drop down list.



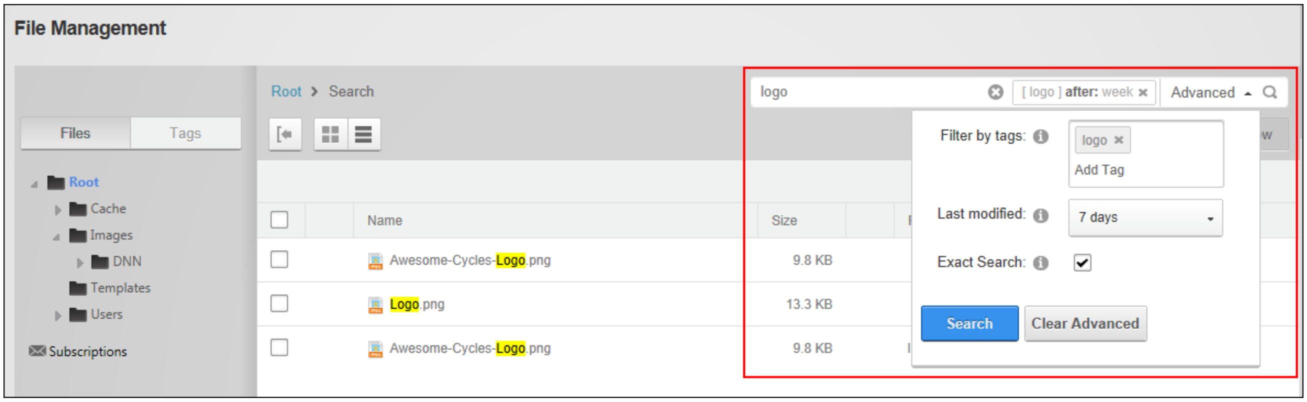
Searching for Files

How to search for files by entering either all or part of the file name or by entering a wild card search for a file extension, e.g. *.docx. Search results will include all files that match the entered criteria and are within the currently selected folder and any of its subfolders. All users can perform this task.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select a folder to search for files within both the selected folder and its subfolders.
3. Enter the search criteria into the **Search** text box.
4. **Optional.** Open the Advanced section and add on or more of these additional search criteria:
   - **Filter by Tags**: Begin typing a tag name. A list of matching tags will be displayed as you type. Select the one you want to filter result by.
   - **Last Modified**: Select the date range when the file was last modified

- **Exact Search**: mark ☑ the check box to only include files with the exact name as entered in the search box.

5. Strike the **Enter** key. Matching files are now displayed in the Files Window below with the search term highlighted in yellow.



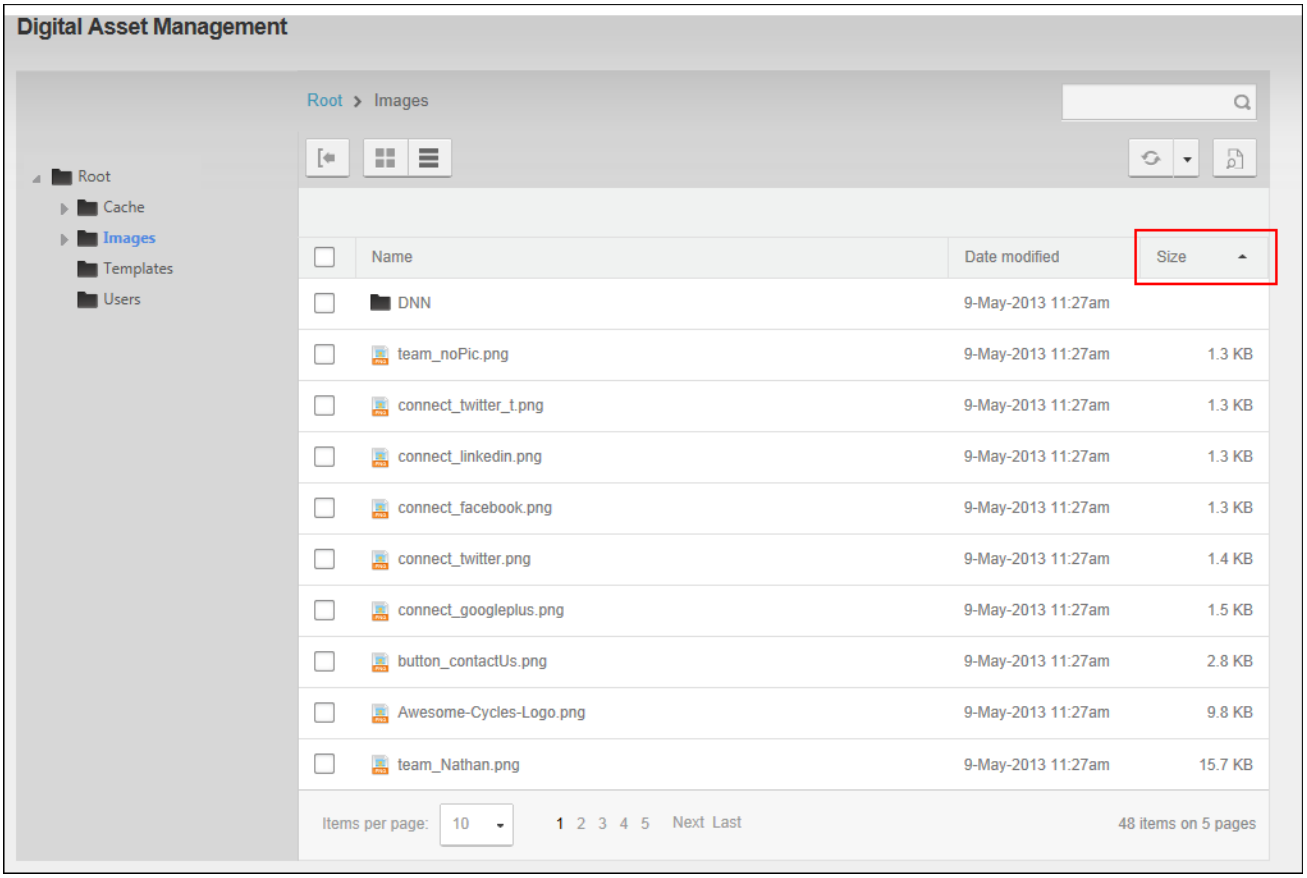
Advanced Search

keyword

Setting Sort Order of Files

The files displayed in the Files Window of the Digital Asset Management Pro module can be sorted alpha-numerically in either ascending or descending order by either the Name, Date Modified or Size column. The default sort order is in ascending order by file name (Name column) by default. All users can perform this task.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. In the Title Bar of the Files Window, click on the Name, Date Modified, or Size column name to sort files by that column. This sorts the files in the selected column in ascending order and displays the **Sorted Asc** icon beside the selected column.
3. **Optional.** Click the same column name a second time to reorder files in descending order. The **Sorted Des** icon will then be displayed beside the selected column.



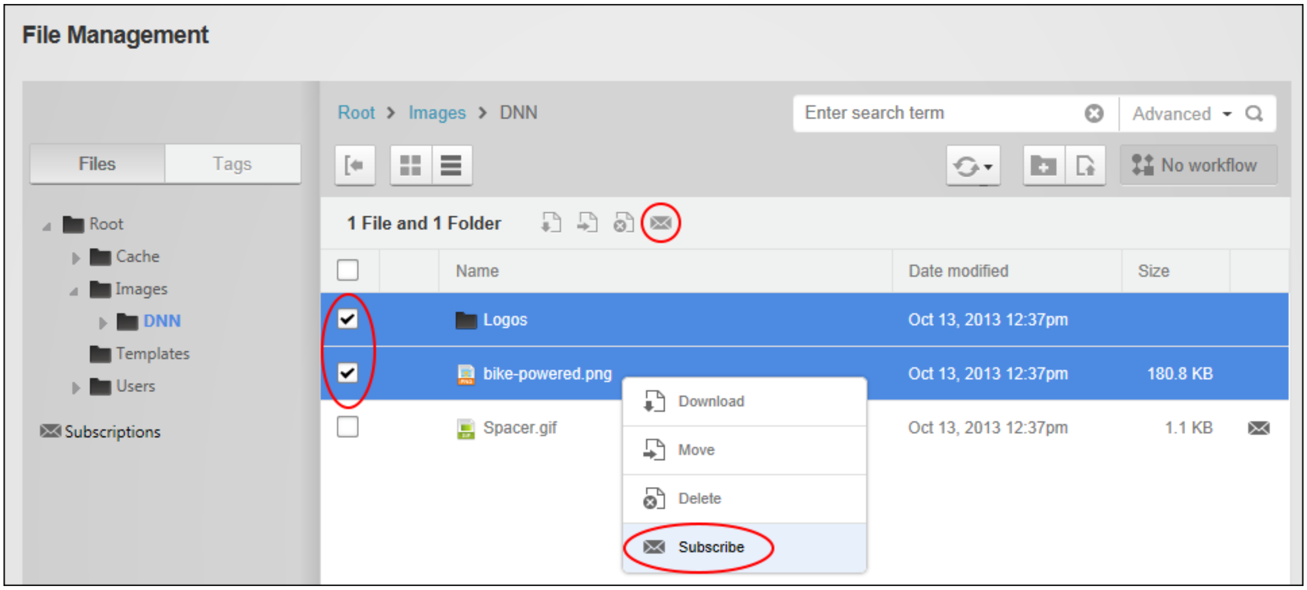
Files ordered by file size in ascending order

Subscribing/Unsubscribing to Files and Folders

How to subscribe to or unsubscribe from receiving a notification message whenever a change is made to the file you have subscribed to or a file within the folder you have subscribed to. Notification are not sent when new files are created, file Metadata is changed, the file or folder is downloaded, if there are file workflow stage changes to the file, when the file expires, or when there are changes to folder permissions or properties. Authenticated users must be granted view permission to the folder where a file is located to subscribe to a folder. Users must be granted read and browse permissions to a folder to subscribe to a folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required file or folder.
3. In the Files Window, mark the check box beside each file or folder you want to subscribe to or unsubscribe from - OR - mark the check box in the File Window Title Bar to select all items on the current page.

4. Right click on the row of a selected item and select **Subscribe** or **Unsubscribe** from the drop down menu - OR - Click the **Subscribe** or **Unsubscribe** button in the Files Window Tool Bar. Note: If you have selected multiple items they must all be the same subscription status to update at the same time.



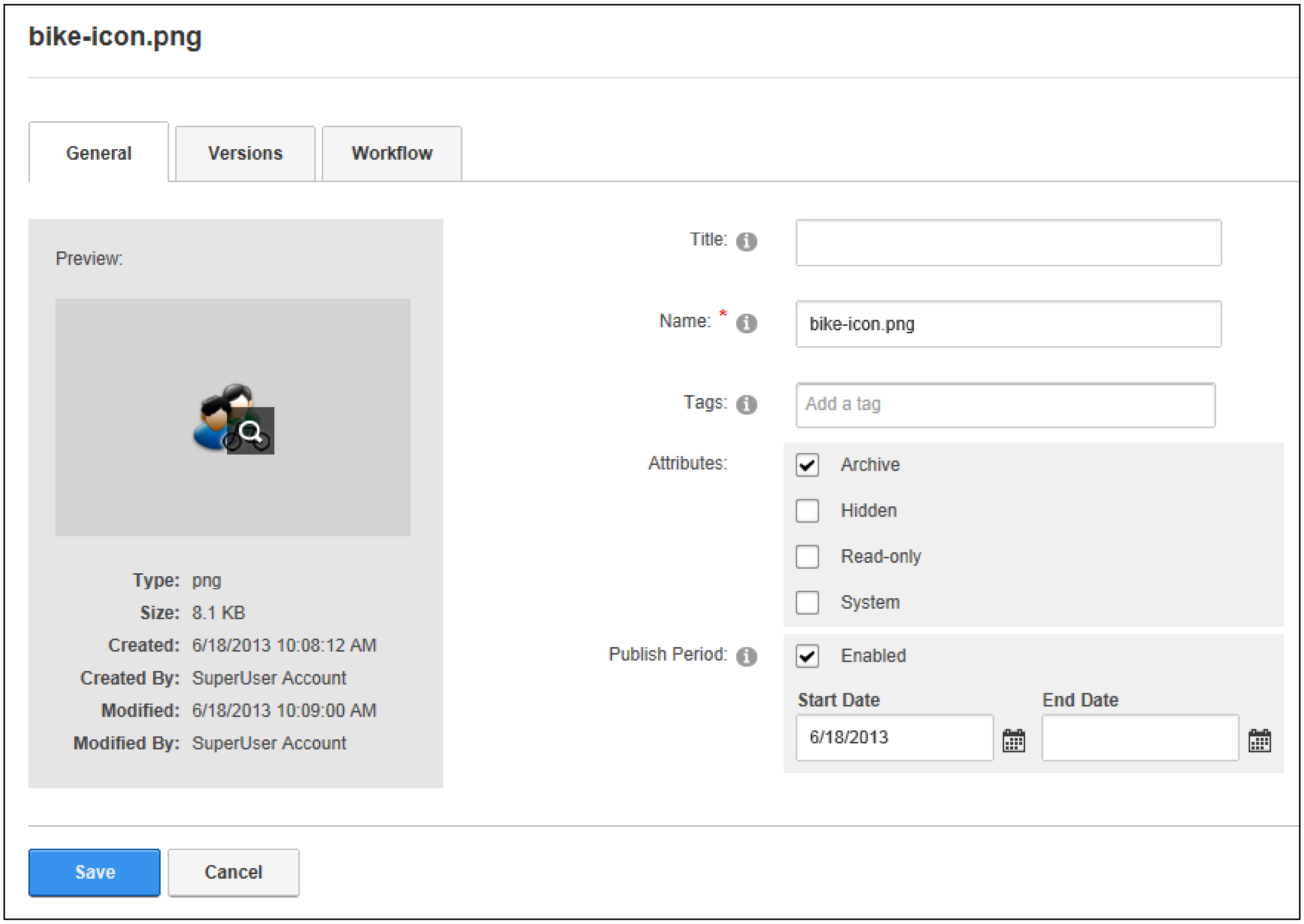
- The **Subscribe** icon is displayed beside each item you are subscribed to. E.g. In the above image the Spacer.gif image is already subscribed to.
- A full list of your current subscriptions can be viewing by clicking on **Subscriptions** below the Folder list. From here you can unsubscribe and perform other file management tasks such as move, delete, etc.
-

Viewing File Properties

How to view the general properties of a file within the Digital Asset Management Pro module. All users can view file properties and statistics. Folder Editors have additional rights to manage the file properties.

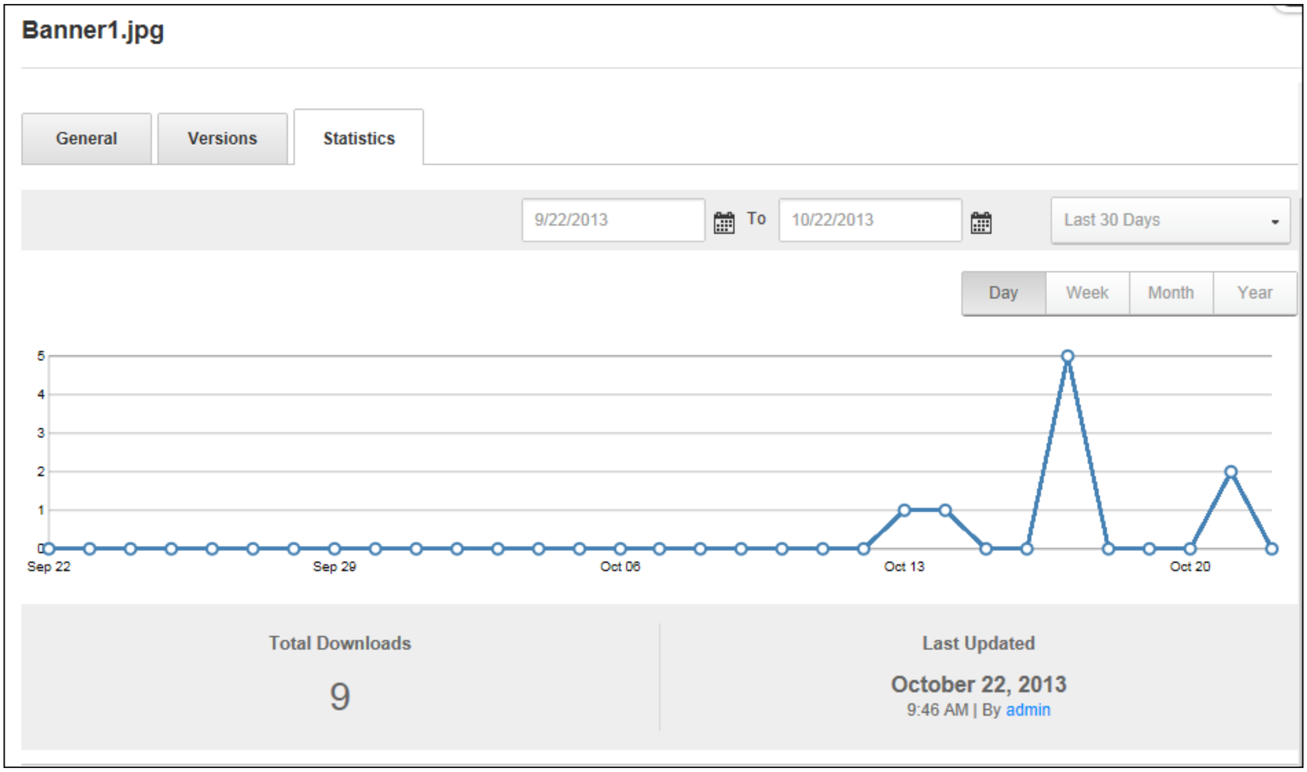
1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required folder.
3. Right click on the file row and select **View Properties** - OR - Mark the check box beside a file and click the **View Properties** button in the Files Window Tool Bar.

4. The following information is displayed on the General tab:
    - **Preview**: If the file is an image a thumbnail of the image is displayed. If the file isn't an image then a thumbnail image of the file type is displayed.
    - **Type**: The file extension type. E.g. png, gif, txt, etc.
    - **Size**: The file size.
    - **Created**: Date and time when this file was uploaded.
    - **Created By**: First and last name of the user who uploaded this file. This field will be blank for folders that were generated when the site was built.
    - **Modified**: Date and time when this file was last uploaded. E.g. A newer version of this file.
    - **Modified By**: First and last name of the last user to modify the file.
    - **Title**: A descriptive title of the file.
    - **Name**: The file name.
    - **Tags**: User set tags to identify the file.
    - **Attributes**
        - **Archive**: Indicates whether this file can be archived by the operating system. This option is selected by default.
        - **Hidden**: Indicates whether the file is hidden. Hidden files don't display on your site in modules such as HTML / HTML Pro, they are also not displayed on vendor banners, nor are they displayed for selection from the Rich Text Editor image or file galleries. This option is disabled by default.
        - **Read-only**: Indicates whether the file is Read Only. This option is disabled by default.
        - **System**: Indicates whether the file can be indexed by the system. Enable this option to include this file in the Indexing Service of your computer. Indexing this file will make it return faster in search results on your computer. This option is disabled by default.
    - **Publish Period**: Start and end dates can be set for publishing a version of a file.



General Properties tab of a file in Digital Asset Management Pro

5. Select the Statistics tab to view the number of times the file has been download from the site. Various filters are included allowing you to change the date range of the statistics or you can specify an exact date range. The download statistic tracks all downloads from DNN including both direct downloads made by navigating to the file URL and downloads made using modules such the Document Viewer or if the file was added as link using HTML Pro.

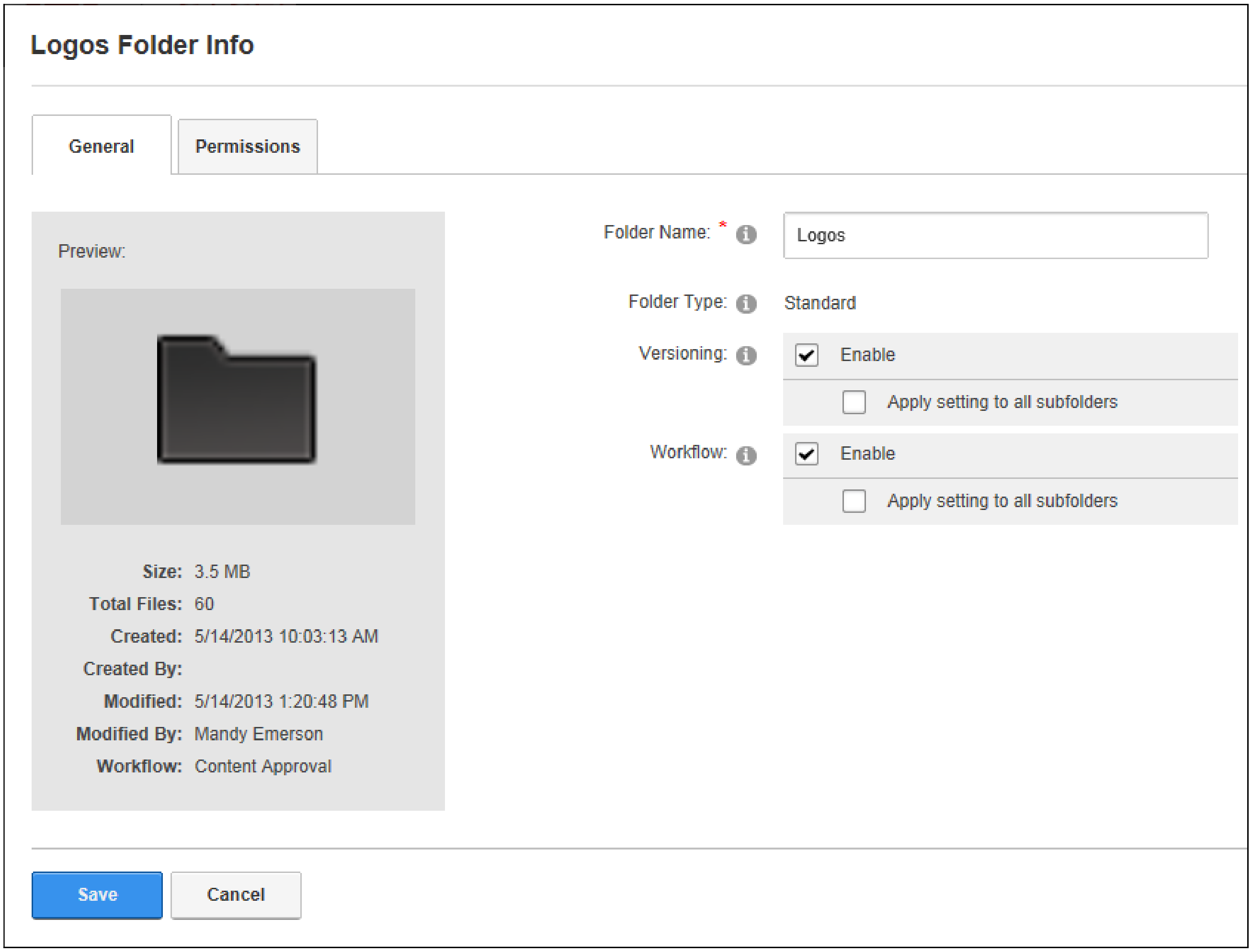


Viewing Folder Properties

How to view the properties of a folder within the Digital Asset Management Pro module. All users can view folder properties. Folder Editors have additional rights to manage folder properties. See "Managing Folder Properties"

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required folder.
3. Select the folder and click the **View Folder Properties** button in the toolbar - OR - Right click on the folder and select **View Folder Properties**.
4. The following information is displayed:
   - **Preview**: Displays a thumbnail image of the folder.
   - **Size**: Total size of all the files within this folder.
   - **Total Files**: Total number of the files within this folder.
   - **Created**: Date and time when this folder was created. This field will be blank for folders that were generated when the site was built.

- **Created By**: First and last name of the user who created this folder. This field will be blank for folders that were generated when the site was built.
- **Modified**: Date and time when this folder was last modified.
- **Modified By**: First and last name of the last user to modify the properties of this folder.
- **Folder Type**: Indicates the type of folder. I.e. Standard, secure, database, Amazon Folder Provider, Azure Folder Provider or UNC Folder Provider.
- **Folder Name**: Displays the folder name.
- **Versioning**: Indicates whether versioning of files within this folder has been enabled.
  - **Apply settings to all subfolders**: Indicates whether versioning is applied to all subfolders of this folder.
- At **Workflow**, Indicates whether workflow is enabled for this folder.
  - **Apply settings to all subfolders**: Indicates whether workflow is applied to all subfolders of this folder.



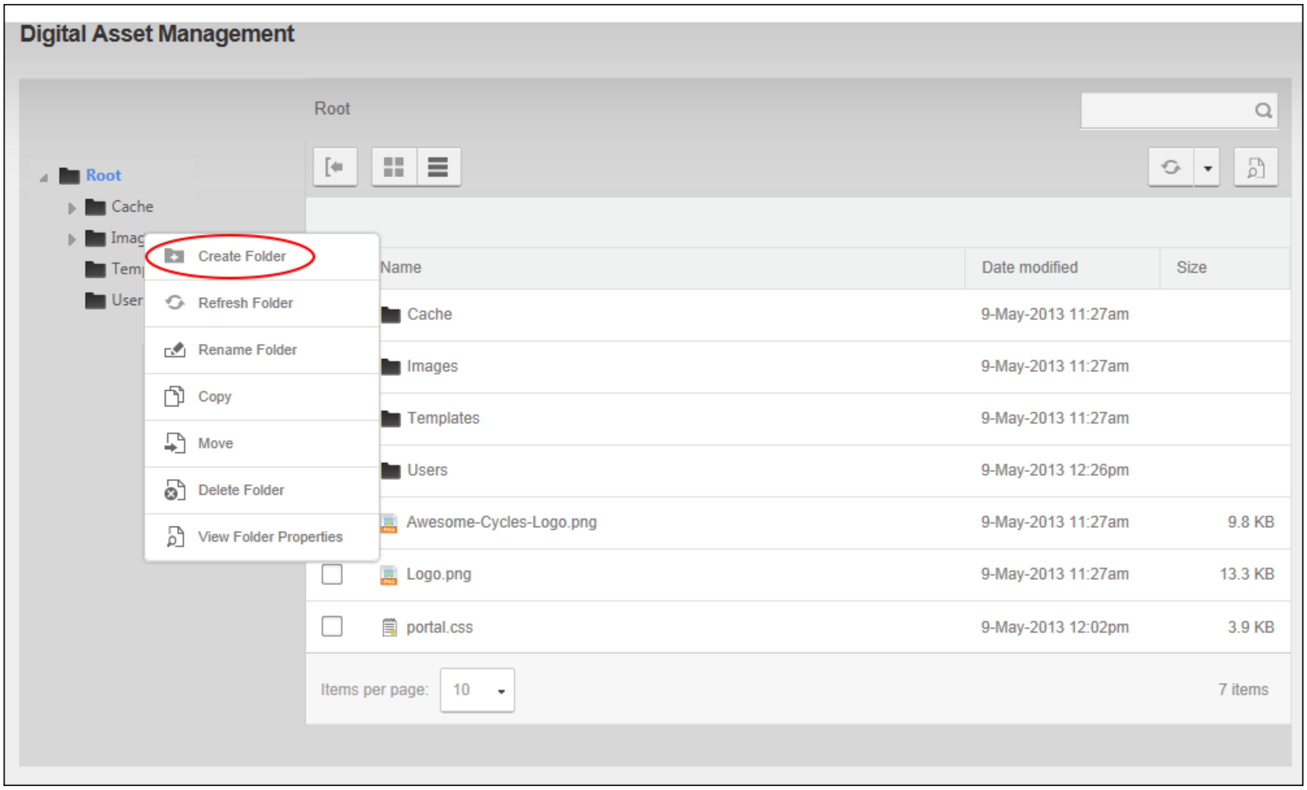
Folder Editor

Adding a SubFolder

How to add a subfolder to the Digital Asset Management Pro module. The new folder will inherit the permissions assigned to its parent folder. All DNN Platform users who have been granted Write to Folder permission to a folder can add subfolders. All Evoq Content users who have been granted Add permission to a folder can add subfolders.

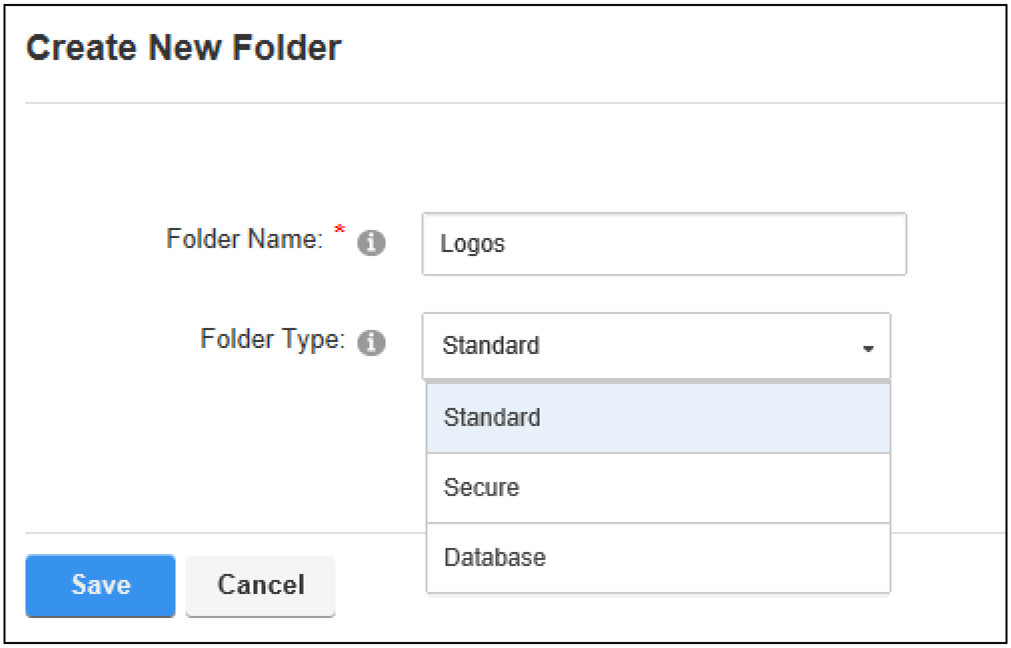
Prerequisite. Amazon, Azure and UNC folder types must be created before these folder types can be selected. See "Adding an Amazon S3 Folder Type", See "Adding a UNC Folder Type", or See "Adding a Windows Azure Folder Type"

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the folder that you want to add a subfolder beneath.
3. Right click on the folder name and select **Create Folder** - OR - Click the **Create New Folder** button on the toolbar.

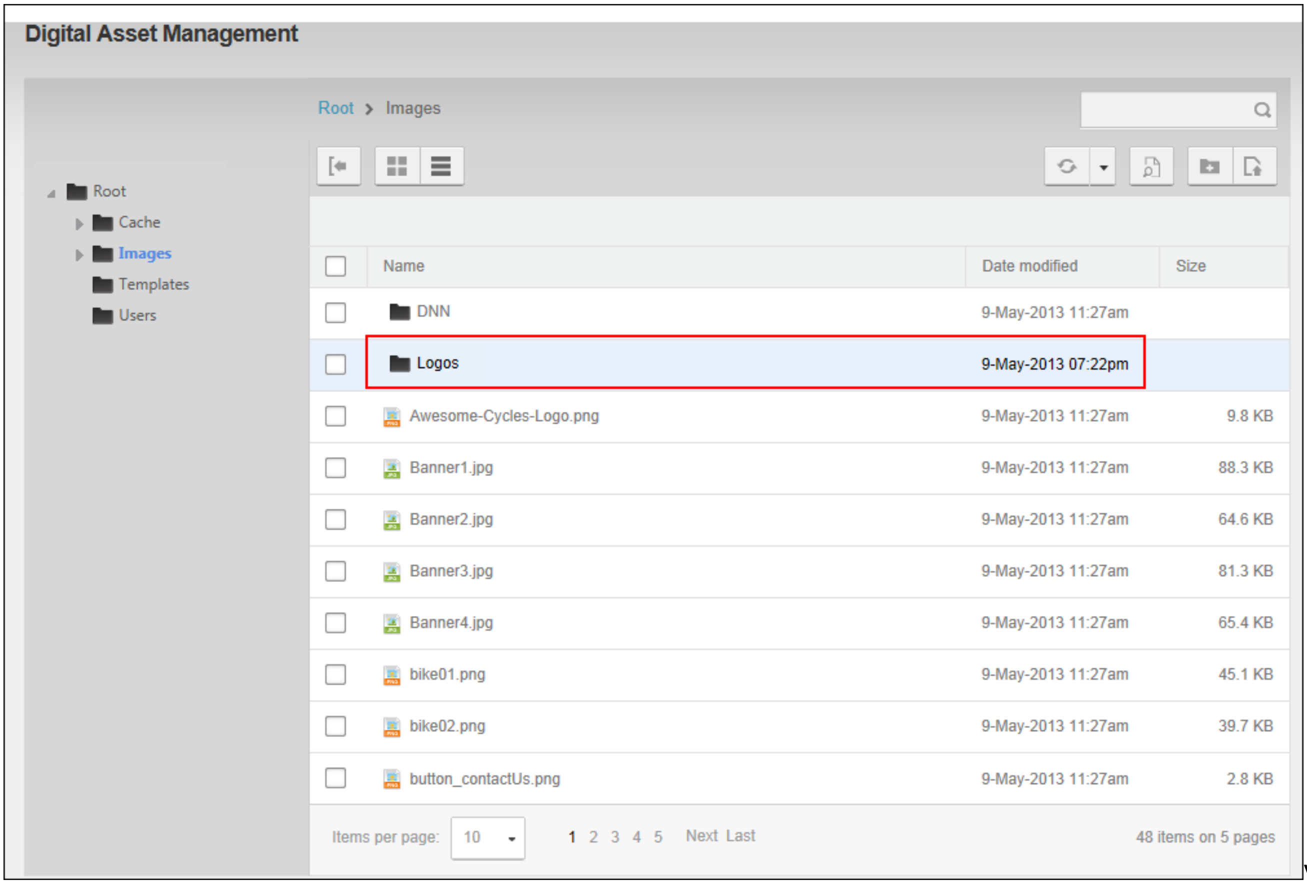


4. In the Create New Folder window complete the following:
   1. In the **Folder Name** text box, enter a name for the new folder.
   2. At **Folder Type**, select the type of folder you want to create. The default option displayed will be inherited from the parent folder or if you are adding a folder to the root folder, the default type will be Standard unless otherwise configured. The available options are:
      - **Standard**: Select this option to store most of your files.
      - **Secure**: Select this option if you want to encrypt the file name to prevent direct linking to this file.
      - **Database**: Stores files as a byte array in the database rather than in the usual file system.
      - **Amazon Folder Provider**: Stores files on the Amazon service.
      - **Azure Folder Provider**: Stores files on the Azure service.

- **UNC Folder Provider**: A UNC (Universal/Uniform Naming Convention) path describes the location of a volume, directory, or file. UNC paths apply to all operating systems, are not case-sensitive and follow the format \\server\volume\directory\file.



5. Click the **Save** button. The new folder is now added and displayed in the Files Window.
6. **Optional.** If this folder requires different permissions than its parent folder, See "Modifying Folder Permissions". To set file versioning and/or workflow for this folder, See "Managing Folder Properties"



The Newly Added Folder displayed in the Folder Explorer

Overview of Folder Types

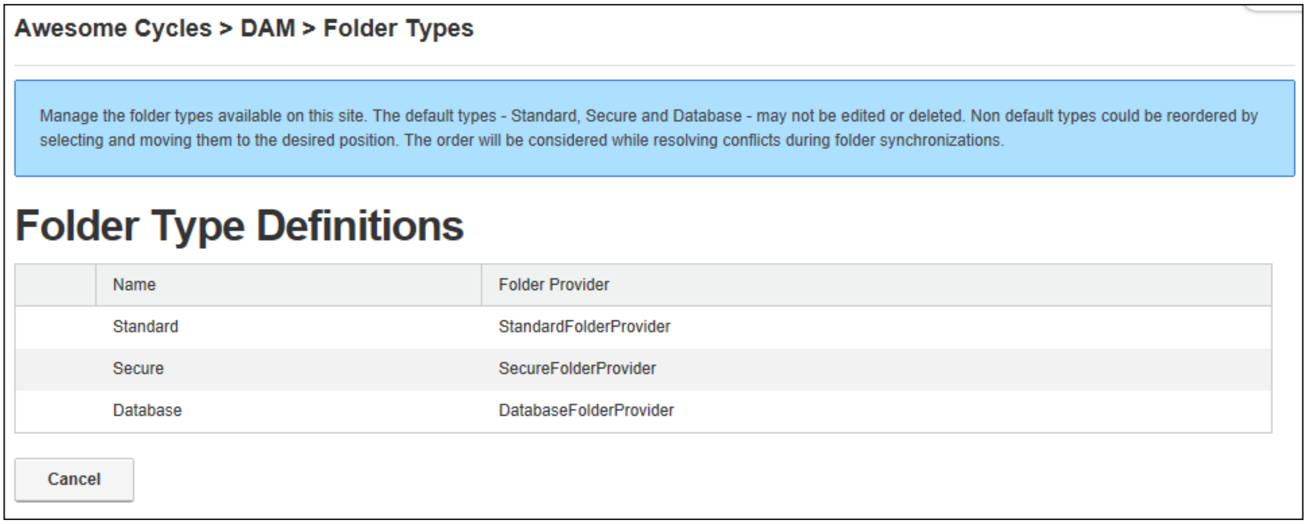
The Digital Asset Management Pro module comes with the following folder types:

Overview of the folder types:

- **Standard - File System**: Location to store most of your files. This is the default option.
- **Secure - File System**: This folder encrypts file names to prevent direct linking to files.
- **Secure - Database**: Stores files as a byte array in the database rather than in the usual file system.
- **Amazon Folder Provider**: Stores files on the Amazon service.
- **Azure Folder Provider**: Stores files on the Azure service.
- **UNC Folder Provider**: UNC (Universal Naming Convention or Uniform Naming Convention) folders specify the location of resources on a local-area network (LAN) using the following format:\\server-name\shared-resource-pathname.

To view the folder types available on your site:

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select **Edit** > **Mange Folder Types** from the module action menu.

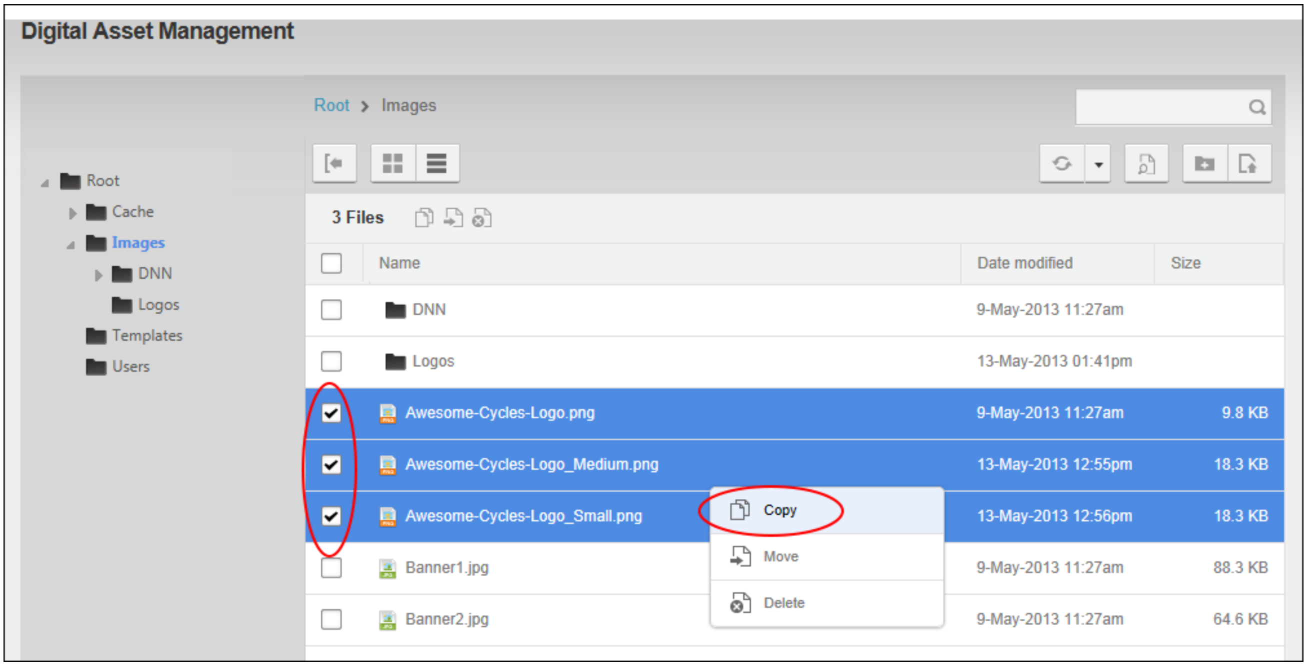


The Folder Type Definitions page

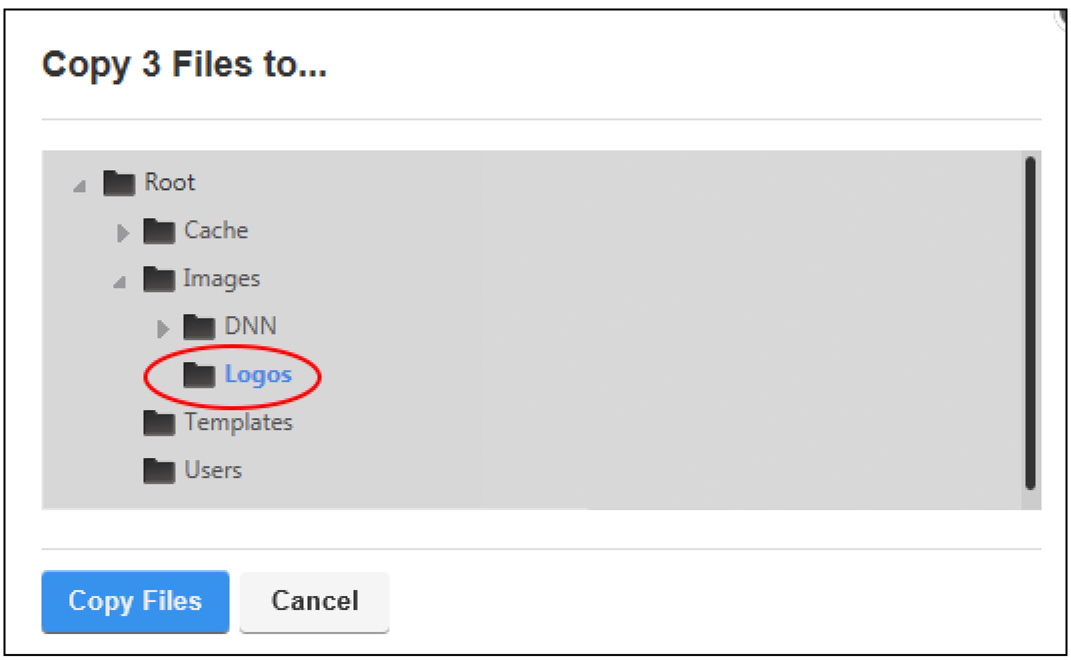
Copying Files

How to copy one or more files from one folder to another folder of the Digital Asset Management Pro module. Evoq Content and Evoq Content Enterprise, users (including anonymous users) must be granted Copy permission to both the folder where the file is located and the folder that the file is being copied to.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder where the files to be copied are located. See "Navigating to and Selecting Folders"
3. In the File Window, mark the check box beside each file to be copied - OR - mark the check box in the File Window Title Bar to select all items that are currently displayed and then deselect any folders than have been selected. This is required because folders cannot be copied and the Copy option will not display until the folders are deselected. Tip: See "Navigating to Files" learn how to select different or additional files than those on the current page.
4. Right click on a selected item and select **Copy** from the drop down menu - OR - Click the **Copy** button in the Files Window Tool Bar.



5. This displays the Folder Navigation Tree in a new window. Choose the folder where the files will be copied too.



6. Click the **Copy Files** button.

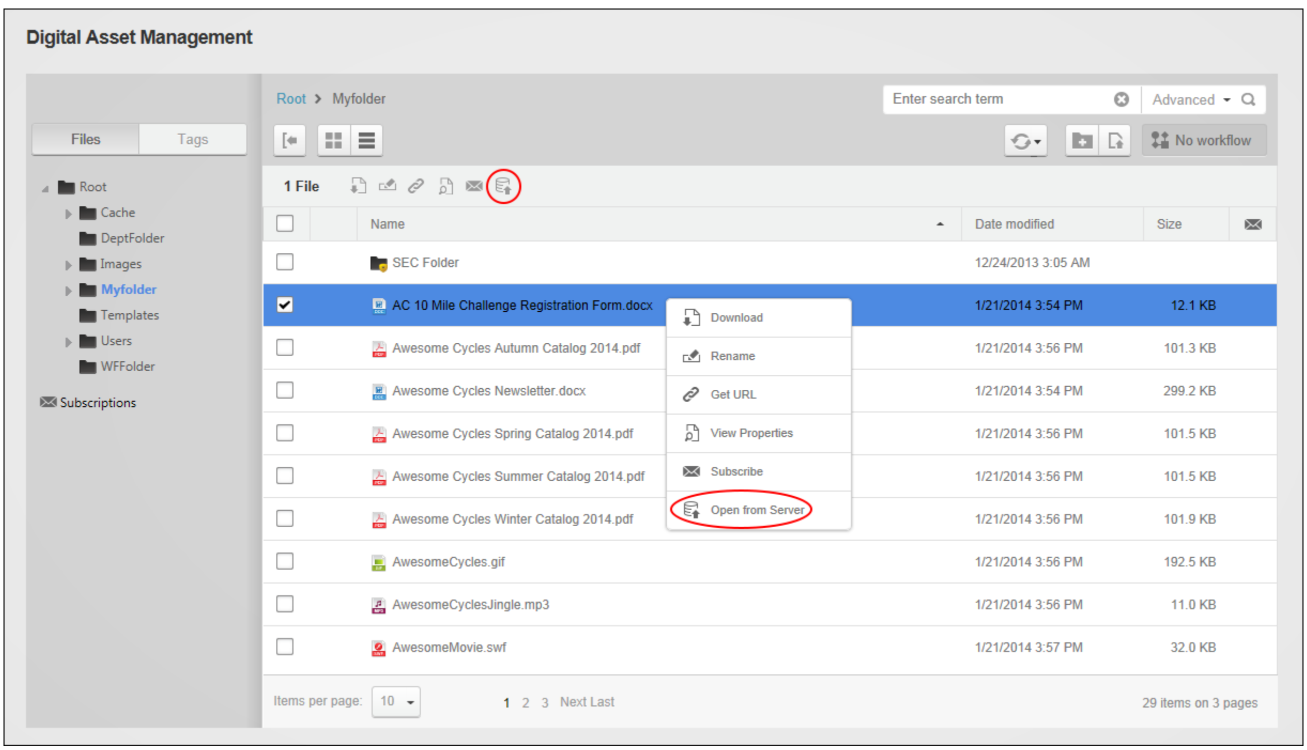
Tip: If you are only coping one file you can simply right click on the item and select **Copy** from the drop down list.

Editing a Document

How to edit Microsoft™ Word documents directly on your server without the need for downloading the document. Users must be granted Manage rights to current folder.

Prerequisites. WebDAV must be installed and configured by a SuperUser (See "Installing and Enabling WebDAV") and the folder where the file is located must be a Standard type folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the document.
3. Select **Open From Server** from the toolbar or right click and select **Open From Server** from the drop down menu.



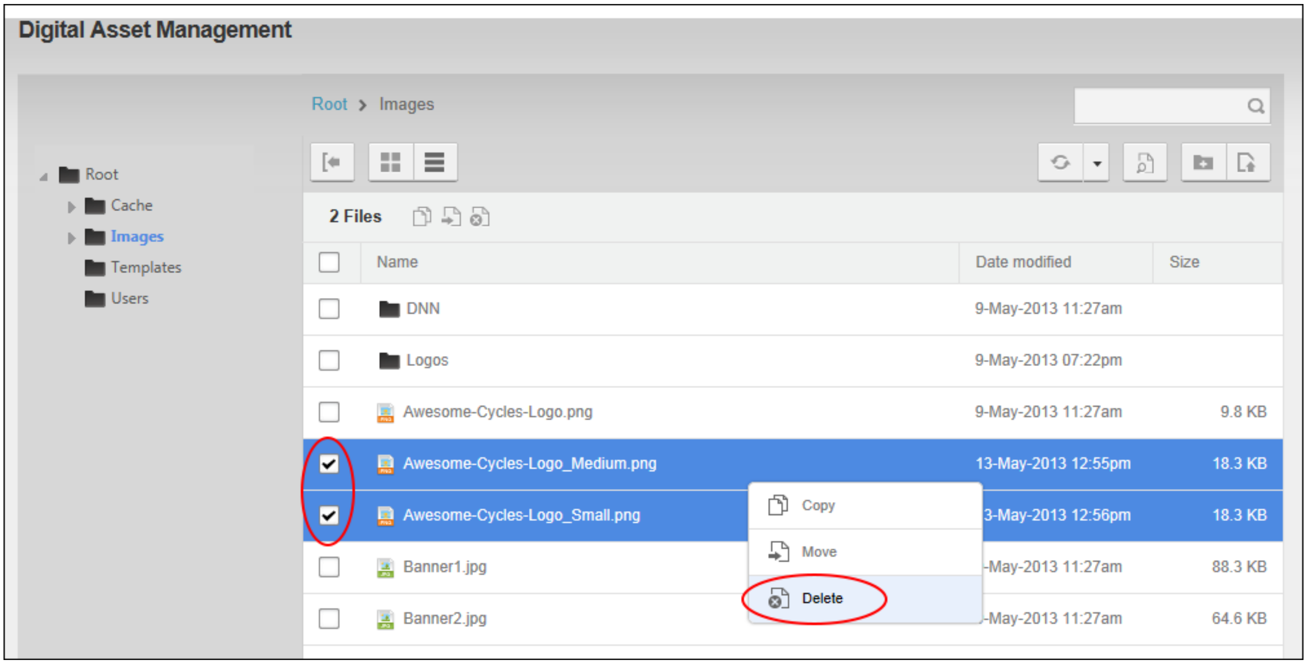
4. Choose to **Edit** the document or **Read Only**. If the document is already being edited you will be given the option to either view a read-only copy of the document or edit the file and merge the changes with the server file when it becomes available. You can also choose to receive a notification when the server file is available.
5. Edit the document as required and then to save it to upload your changes to DAM.

Deleting one or more Files and/or Folders

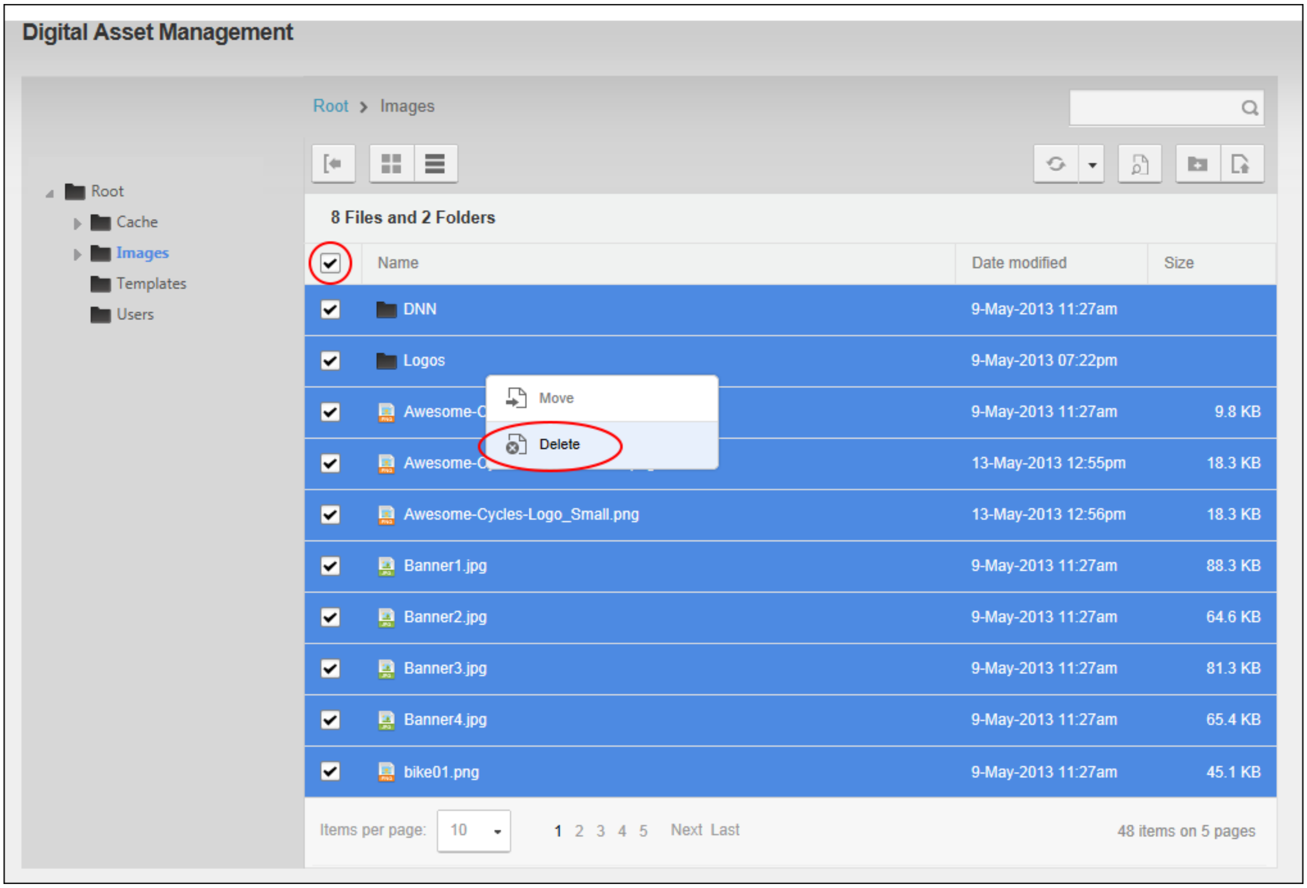
How to permanently delete one or more files and/or one or more folders including all the subfolders and files within that folder from the Digital Asset Management Pro module.

Users (including anonymous users) must be granted Manage Settings permission to the folder that the subfolders or files are located in.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder containing the folders or files to be deleted. See "Navigating to and Selecting Folders"
3. **Optional.** At **Page Size** increase the number of files displayed to view and delete more folders and/or files at one time.
4. In the Files Window, mark the check box beside each item to be deleted - OR - mark the check box in the File Window title bar to select all items on the current page for deletion.
5. Right click on a selected item and select **Delete** from the drop down menu - OR - Click the **Delete** button in the Files Window Tool Bar.



Deleting selected items



Deleting all items displayed on this page

6. This displays the message "Are you sure you want to delete [number of] Folders and [number of] Files?"
7. Click the **Delete** button to confirm deletion.

> Tip: If you are only deleting one file or folder, you can simply right click on the item and select **Delete** from the drop down list.

Managing File Properties

How to modify the properties of files within Digital Asset Management Pro including adding file tags, setting file attributes and setting publishing schedules. All users (including anonymous users) must be granted Manage Settings permissions to the folder where the file is located.

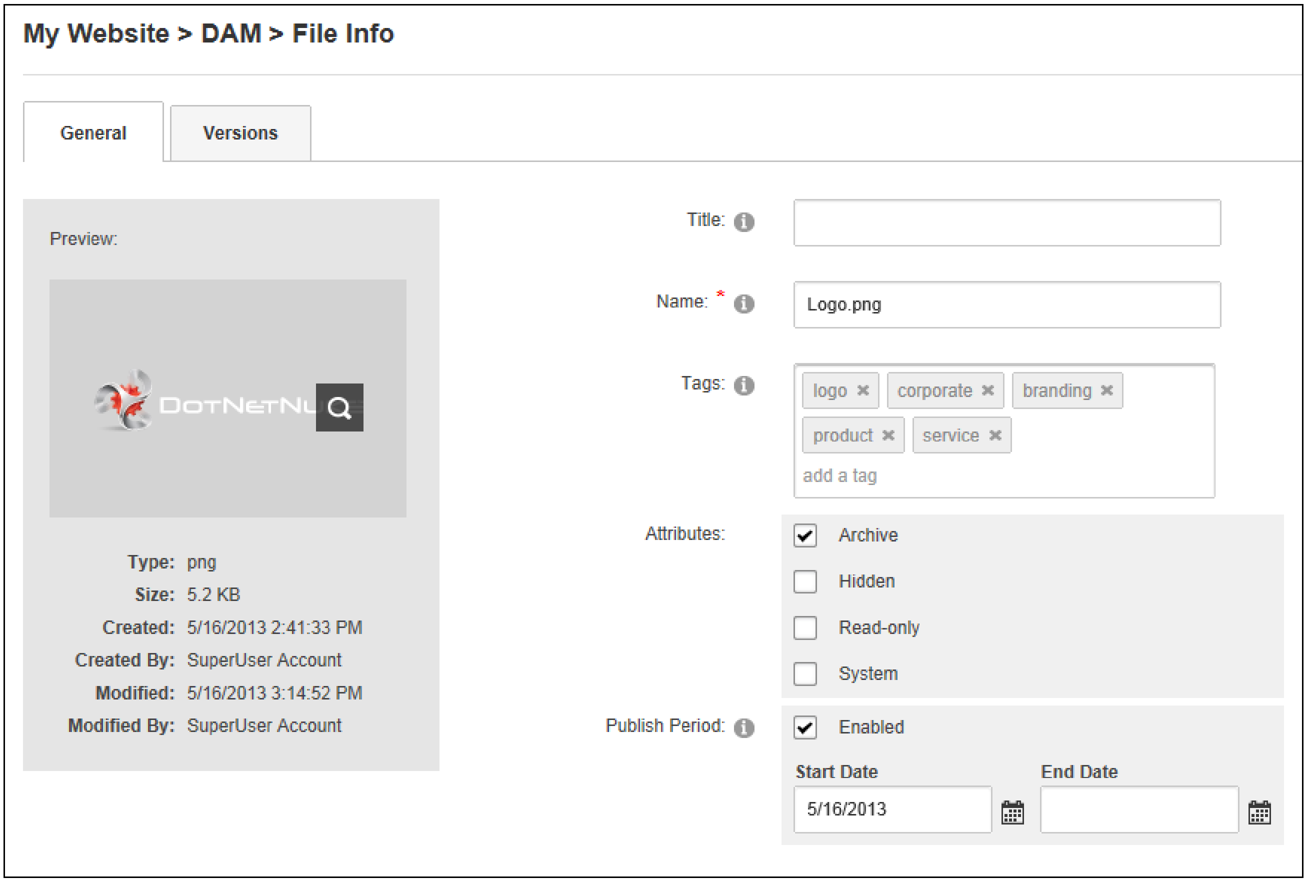
1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required folder.
3. Select the folder and click the **View Folder Properties** button in the toolbar - OR - Right click on the folder and select **View Folder Properties**.
4. The following properties can be edited:
   1. In the **Title** text box, enter a title for this file. The title is metadata of the file.
   2. In the **Name** text box, enter a new file name. **Warning.** Renaming a file does not update any references to this file across your site. E.g. If the file is an image that is displayed in the HTML / HTML Pro module, renaming the file will break the path to the image and you will need to manually update the image path by editing the content of that module. Because of this, it is recommended that you only rename a file when it is first uploaded to the site and has not yet to be used on the site.
   3. In the **Tags** text box, enter one or more tags separated by a comma.
   4. At **Attributes**, modify any of the following file attributes:
      - At **Archive**, mark the check box to allow the file to be archived by the operating system. This option is enabled by default.
      - At **Hidden**, mark the check box to hide this file on the site. Hidden files don't display on your site in modules such as the HTML Pro module, they are also not displayed on vendor banners, nor are they displayed for selection from the Rich Text Editor image or file galleries. This option is disabled by default.
      - At **Read-only**, mark the check box to set the file as read only. This option is disabled by default.
      - At **System**: mark the check box to disable hidden option in file properties (Windows). For fast searching, allow Indexing Service to index this file. This option is disabled by default.
   5. At **Publish Period**, select from these options:
      - Mark the check box at **Enabled** to enable publishing of the file between selected dates. This displays the **Locked** icon beside unpublished file and prevents editing of the file until the publish period is reached. This also hides the file in tools such as the Add Media tool on the Rich Text Editor and the File Link control, thus preventing users from selecting the file when editing modules. Note: If the file is already added to a module before the publish dates are set, the file will not be hidden on the page if the file is located in a standard folder (e.g. Standard - File System) that does not use link click. However if the file is located in a secure folder (e.g. Secure - File System)

that does use link click then the unpublished files will be hidden on the page.

1. At **Start Date**, click the **Calendar** button to edit the start date for this file. The current date, according to your profile time zone is displayed by default.
2. At **End Date**, click the **Calendar** button to select the end date for this file.

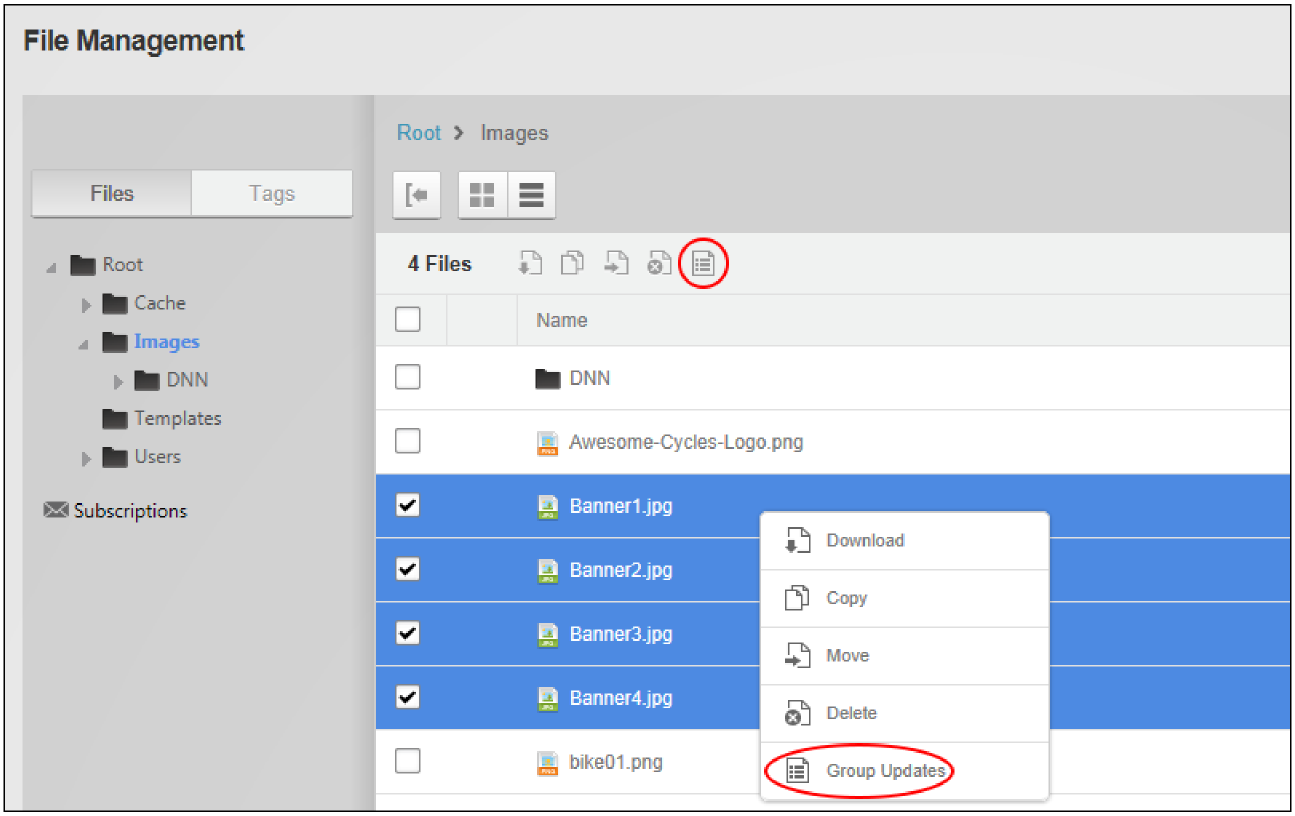
- Unmark the check box to disable publishing between selected dates. This will remain the **Locked** icon from the file and enable the file to be edited.

5. Click the **Save** button to save any modifications.

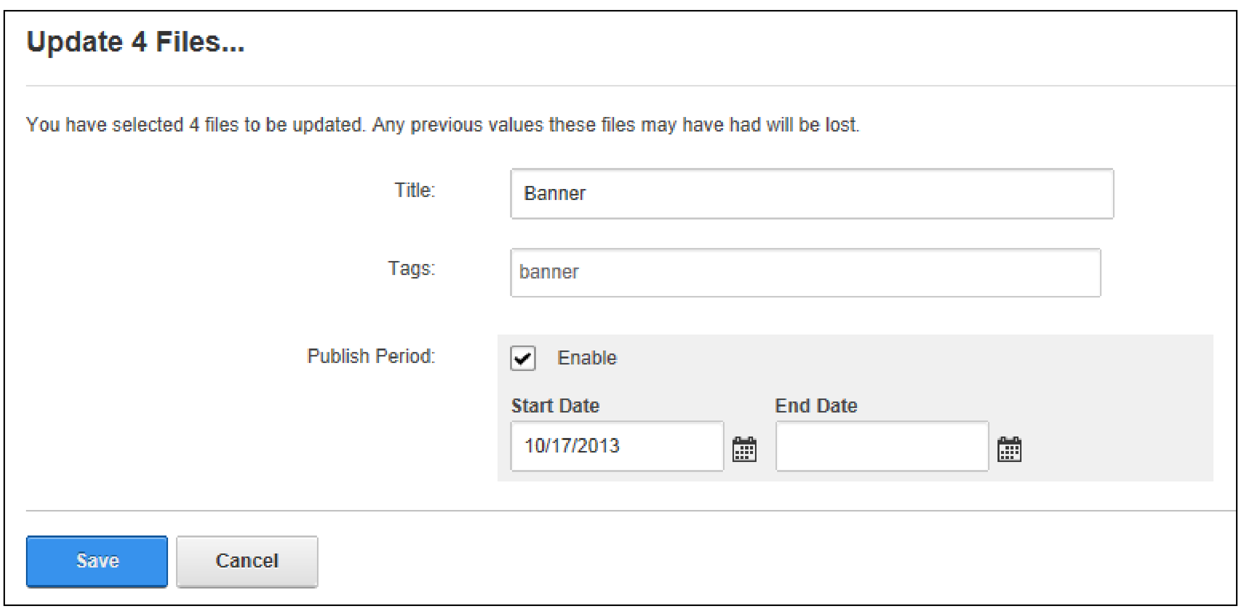


Performing Group Updates

Alternatively, you can modify the Title, Tags and Publish Period of multiple files at one time by selecting multiple files and then selecting **Group Updates** from either the drop down menu or the toolbar.



Group updates to the file title and publish period will replace any existing data however group updates to tags will add the new tags to all of the selected files but will not remove the existing tags.



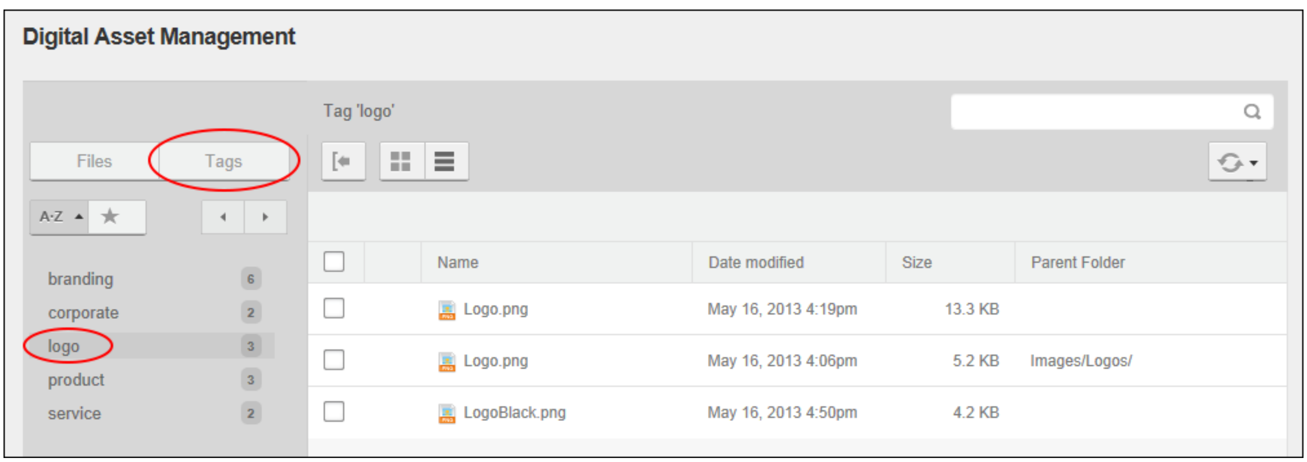
Managing File Tags

How to work with tagged files in the Digital Asset Management Pro module. Registered users must be granted Manage Settings permissions to the folder where the file is located.

Viewing Tags

All users with view rights to the module can view tags.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select the **Tags** button in the top left corner to view the Tags List.
3. Click on a tag name to view results in the File Window.
4. Tags can be sorted in the following orders:
   - A-Z **A-Z**: Click to sort tags in ascending or descending order alphabetically.
   - ★ **Order by Number of Results**: Click to sort tags by frequency of use in either ascending or descending order.
   - **Back** and **Forward**: Click to move back or forward through the list of tags. These buttons will be enabled when more than ten (10) tags are in use.



Adding Tags

Registered users must be granted Manage Settings permissions to a folder to add tags to the files within that folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required folder.

3. Right click on the file row and select **View Properties** - OR - mark the check box beside a file and click the **View Properties** button in the Files Window Tool Bar.
4. In the **Tags** text box, enter one or more tags separated by a comma.
5. Click the **Save** button.

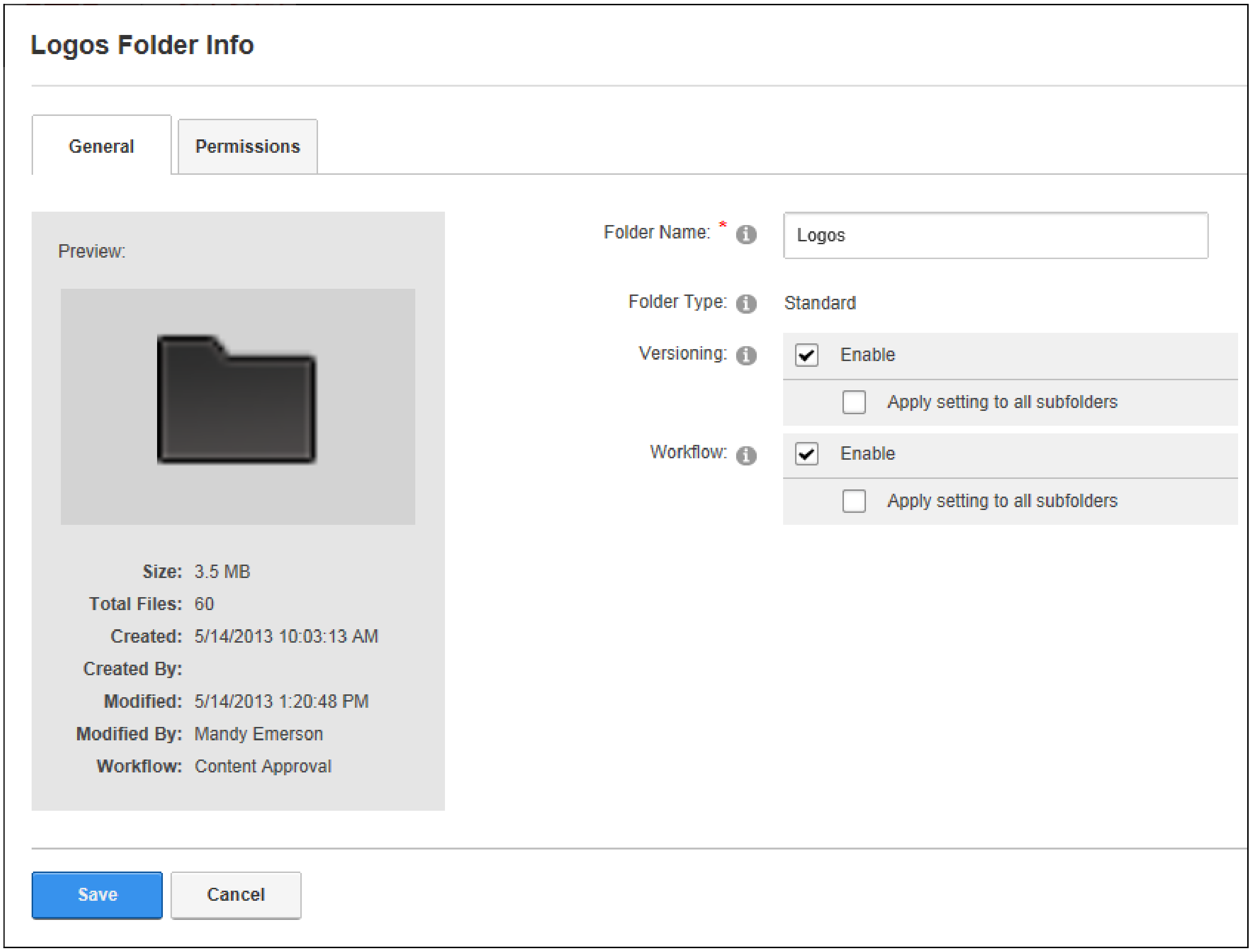
Managing Folder Properties

How to modify the properties and permissions of a folder within the Digital Asset Management Pro module as well as enable and configure file versioning and workflow. Users (including anonymous users) must be granted Manage Settings permission to the folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to the required folder.
3. Select the folder and click the **View Folder Properties** button in the toolbar - OR - Right click on the folder and select **View Folder Properties**.
4. The following information is displayed:
   - **Preview**: Displays a thumbnail image of the folder.
   - **Size**: Total size of all the files within this folder.
   - **Total Files**: Total number of the files within this folder.
   - **Created**: Date and time when this folder was created. This field will be blank for folders that were generated when the site was built.
   - **Created By**: First and last name of the user who created this folder. This field will be blank for folders that were generated when the site was built.
   - **Modified**: Date and time when this folder was last modified.
   - **Modified By**: First and last name of the last user to modify the properties of this folder.
   - **Folder Type**: Indicates the type of folder. I.e. Standard, secure, database, Amazon Folder Provider, Azure Folder Provider or UNC Folder Provider.
5. The following properties can be edited:
   1. In the **Folder Name** text box, enter a new folder name. **Warning.** Renaming a folder does not update any references to the files within the folder across your site. E.g. If a file within this folder is an image that is displayed in the HTML / HTML Pro module, then renaming the file will break the path to the image and

you will need to manually update the image by editing the content of that module. Because of this, it is recommended that you only rename folders before the file within them are used on the site.

2. At **Versioning**, select from these options:
    1. mark ☑ the check box at **Enable** to enable versioning for the files within this folder. This enables the Versioning tab on the File Properties of each file within the folder. - OR - unmark ☐ the check box to disable versioning for this folder. This removes the Versioning tab from the File Properties page for each file within this folder.
    2. mark ☑ the check box at **Apply settings to all subfolders** to apply versioning is applied to all subfolders of this folder. This enables the Versioning tab on the File Properties of each file within subfolder. This option can be selected regardless of whether versioning is enabled on the current folder, allowing you to enable versioning on subfolders but not on the parent folder. Note: This field is be displayed regardless of whether there are any subfolders or not. - OR - unmark ☐ the check box to disable versioning for subfolders. This removes the Versioning tab from the File Properties page for each file within the subfolders.
3. At **Workflow**, select from these options:
    1. mark ☑ the check box at **Enable** to enable workflow for this folder. This enables the Workflow tab on the File Properties page for each file within this folder. - unmark ☐ the check box to disable workflow for this folder. This removes the Workflow tab from the File Properties page for each file within this folder.
    2. mark ☑ the check box at **Apply settings to all subfolders** to enable workflow on all subfolders of this folder. This removes the Workflow tab from the File Properties page for each file within this folder. This option can be selected regardless of whether workflow is enabled on the current folder, allowing you to enable workflow on subfolders but not on the parent folder. Note: This field is displayed regardless of whether there are any subfolders or not. - OR - unmark ☐ the check box to disable workflow for files within this folder. This removes the Workflow tab from the File Properties page for each file within the subfolders. Note: If there are pending items in workflow you will be advised how many pending items are in the workflow process and asked to either **Publish All** or **Discard All** of the pending files. In this scenario, the user does not need to have Ready To Review permissions granted to publish all files.



General Properties of a Digital Asset Management Pro folder

6. Click the **Save** button to save any modifications.
7. If you have chosen to enable versioning or workflow on subfolders, the following message will be displayed "The following changes will be made. Are you sure you want to continue? Enable Versioning on all subfolders. Enable Workflow on all subfolders"
8. Click the **Yes** button to continue.

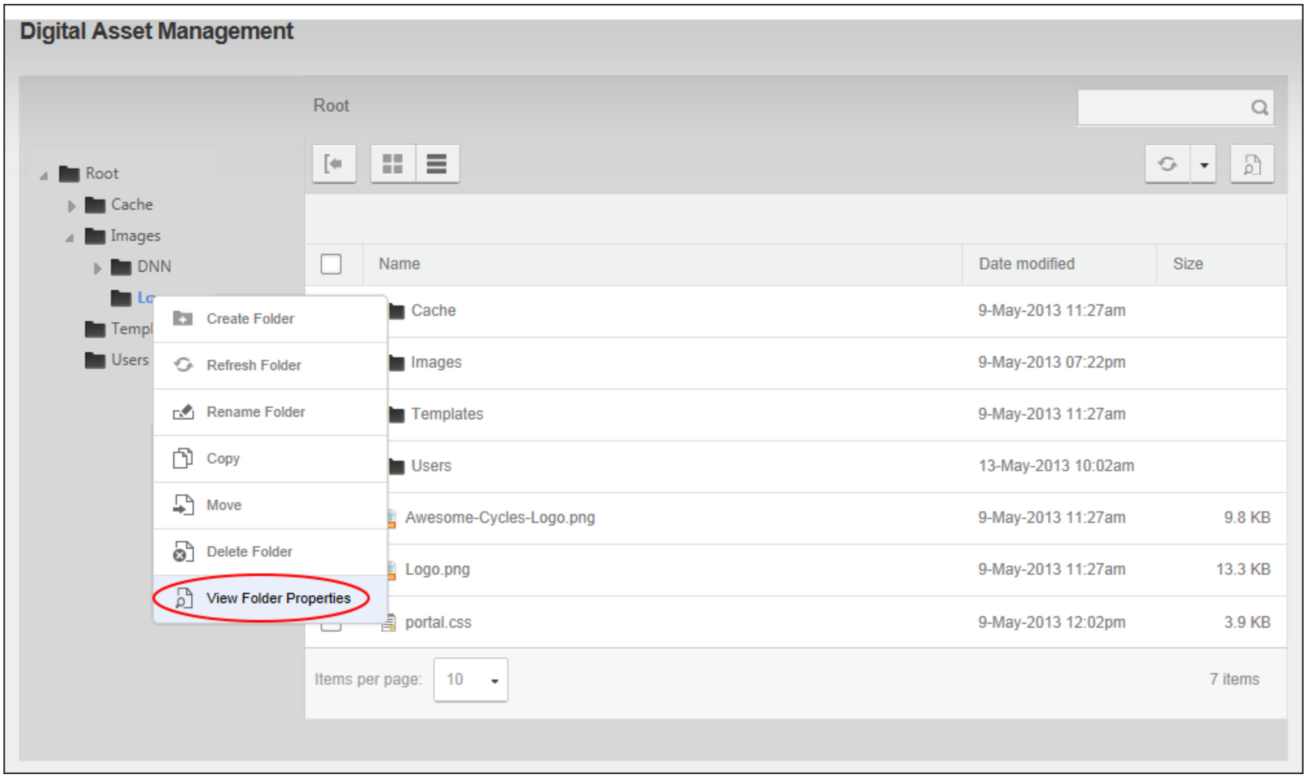
Related Topics:

- See "About Versioning"
- See "Configuring Workflow"

Modifying Folder Permissions

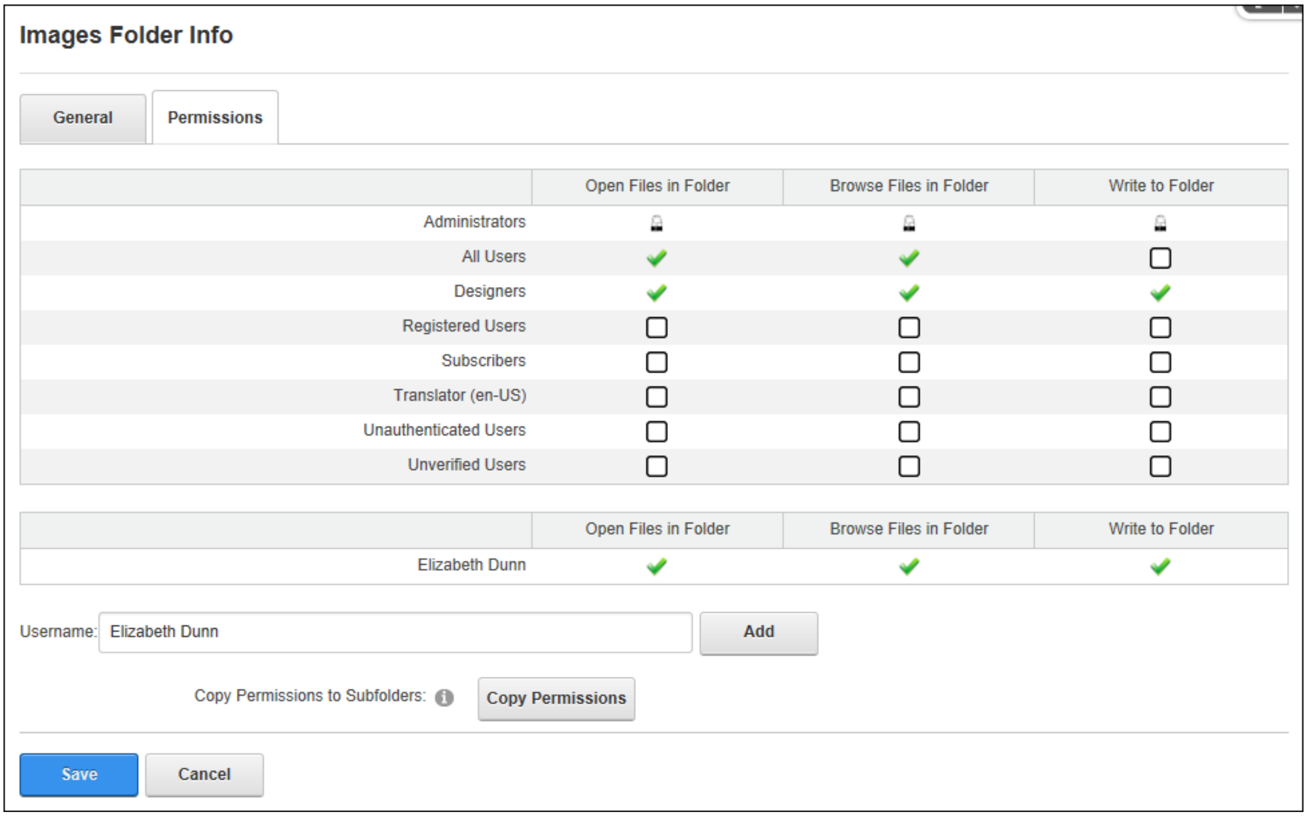
How to modify the permissions assigned to a Digital Asset Management Pro folder. All users who have been granted Add permission to a folder can modify the permissions for that folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the required folder.
3. Right click on the folder name and select **View Folder Properties** - OR - Click the **View Folder Properties** button on the toolbar.



4. Select the **Permissions** tab. The current permission settings are displayed.
5. **Optional.** At **Filter By Group**, select **< All Roles >** from the drop down list to view a list of all available roles or select a specific role to set permissions for that role only.
6. **Optional.** In the **Username** text box, enter the username of the user to have permissions assigned and then click the **Add** button. This adds the user's name.

7. Click on a check box beside a user/role repeatedly until the correct permission (**Permission Granted**, **Permission Denied**, or **Not Specified**) is displayed for viewing files (Opening Files in Folder), browsing files (Opening Files in Folder), or uploading files (Write To Folder).
8. **Optional.** At **Filter By Group**, select another role, role group or Global Roles to set permissions for additional roles.

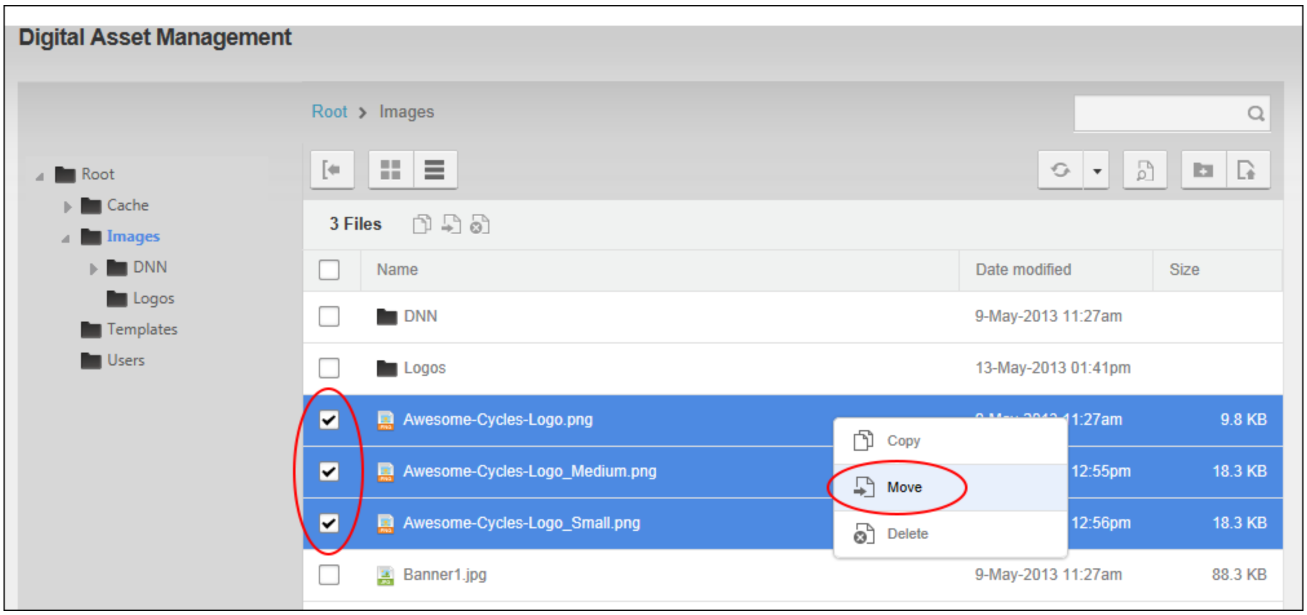


9. Click the **Save** button.

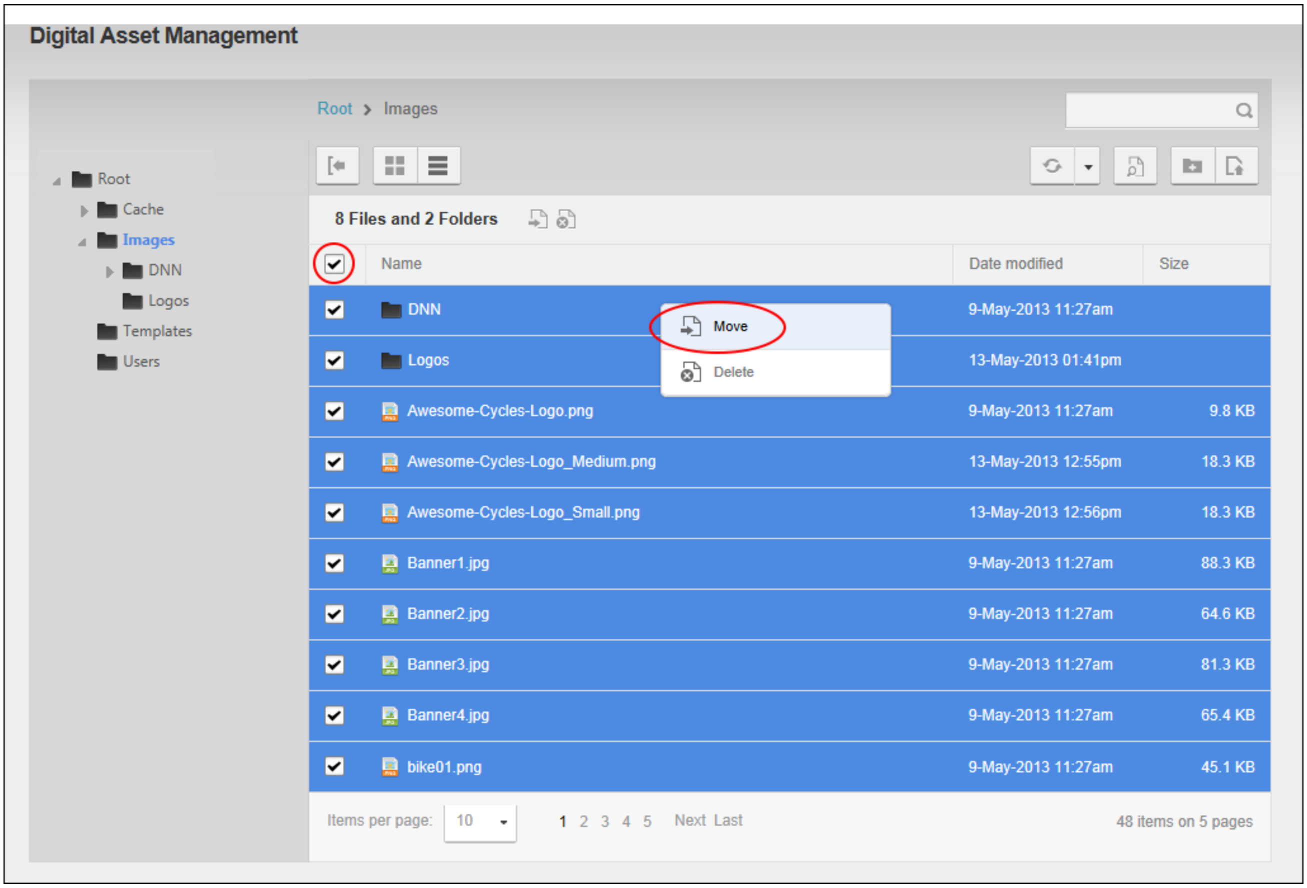
Moving Files and/or Folders

How to move one or more files and/or one or more folders including all the subfolders and files within that folder of the Digital Asset Management Pro module. Users (including anonymous users) must be granted Copy permission to both the folder where the file or folder is located and the folder that the file or folder is being moved to.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder where the files to be moved are located. See "Navigating to and Selecting Folders"
3. In the Files Window, mark the check box beside each item to be moved - OR - mark the check box in the File Window Title Bar to select all items on the current page. Tip: See "Navigating to Files" learn how to select different or additional files and folders than those on the current page.
4. Right click on the row of a selected item and select **Move** from the drop down menu - OR - Click the **Move** button in the Files Window Tool Bar.

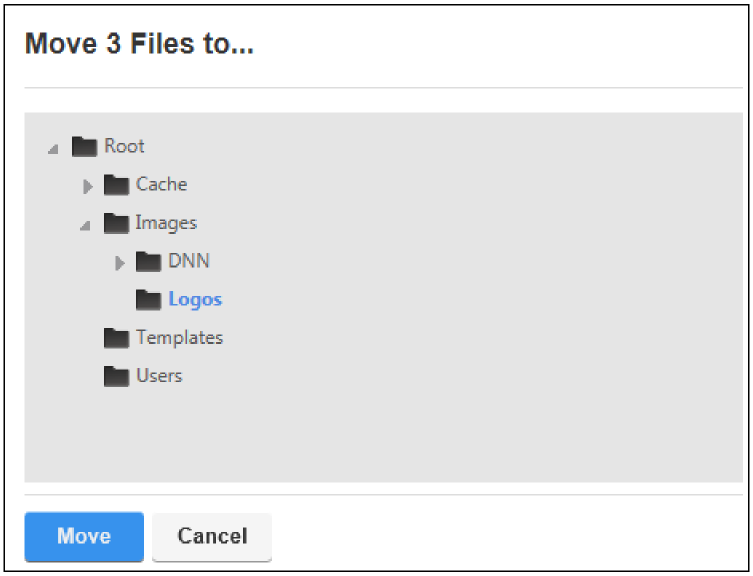


Moving selected items



Moving all items displayed on this page

5. This displays the Folder Navigation Tree in a new window. Choose the folder where the files and/or folders will be moved too.



6. Click the **Move** button.

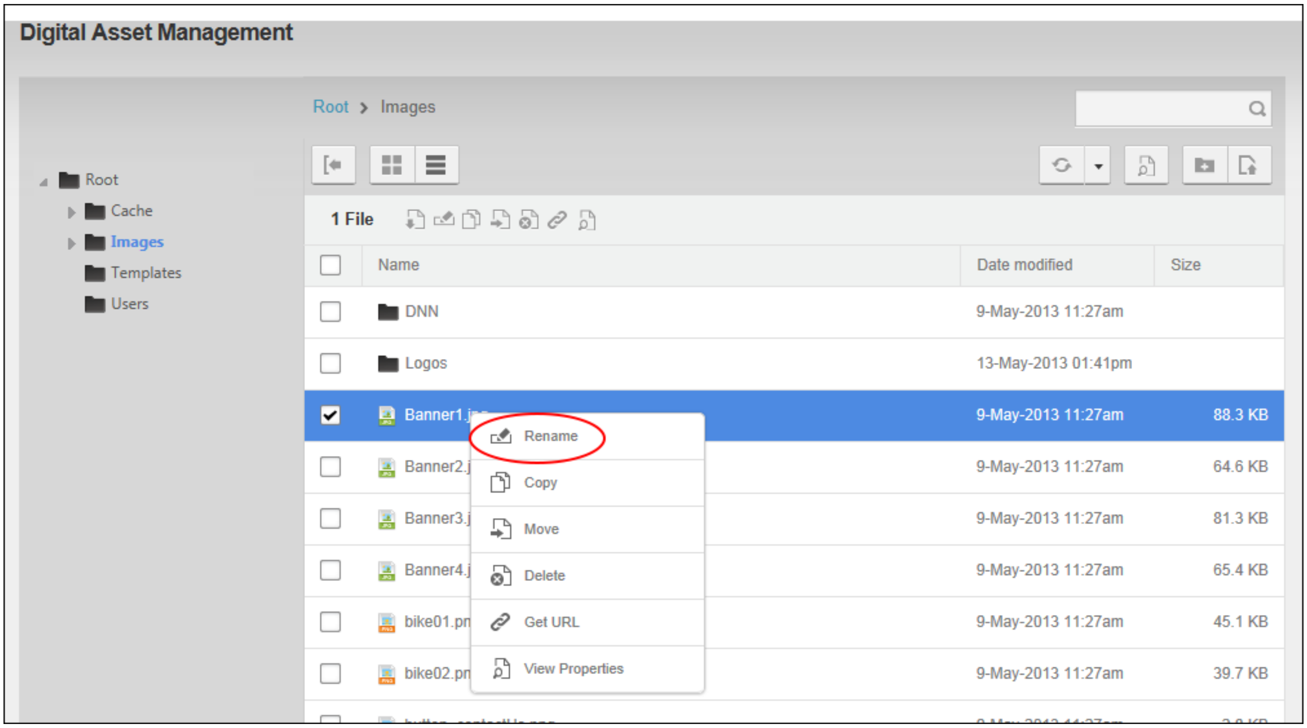
> Tip: If you are only moving one file or folder, you can simply right click on the item and select **Move** from the drop down list.

Renaming a File

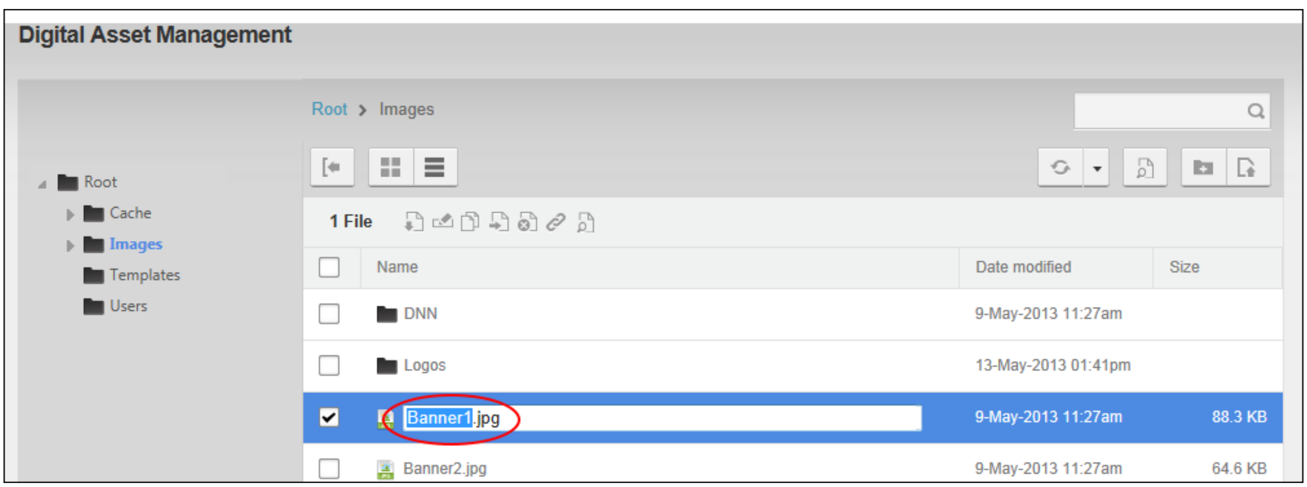
How to rename a file within the Digital Asset Management Pro. Users must be granted Manage Settings permission to the folder where the file is located.

Warning. Renaming a file does not update any references to this file across your site. E.g. If the file is an image that is displayed in the HTML / HTML Pro module, renaming the file will break the path to the image and you will need to manually update the image path by editing the content of that module. Because of this, it is recommended that you only rename a file when it is first uploaded to the site and has not yet to be used on the site.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder where the file is located. See "Navigating to and Selecting Folders"
3. In the Files Window, right click on the name of the file.
4. Right click on the file row and select **Rename** from the drop down menu - OR - mark the check box beside the file and then click the **Rename** button in the Files Window Tool Bar.



5. The name of the selected file is now highlighted.

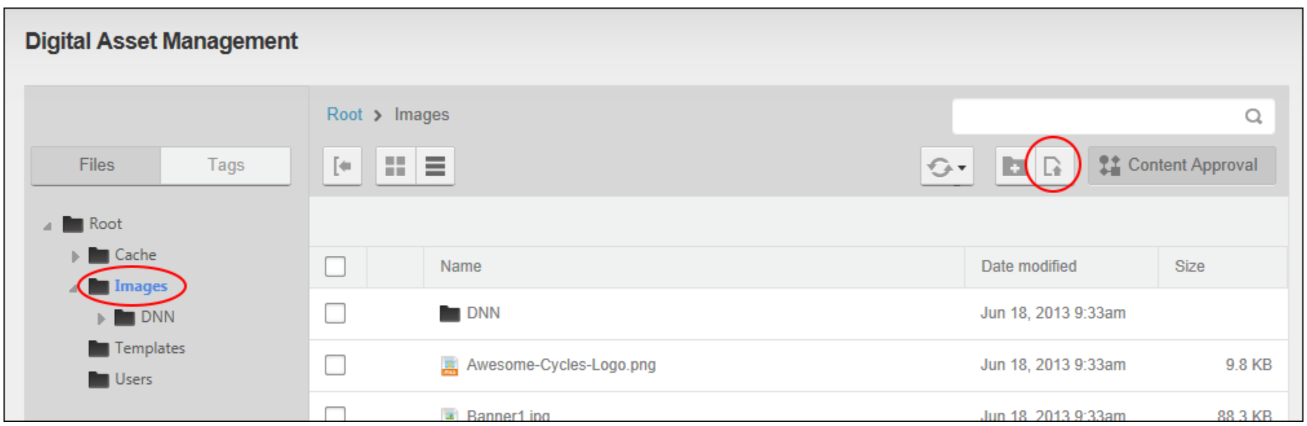


6. Enter the new file name and strike the **Enter** key.

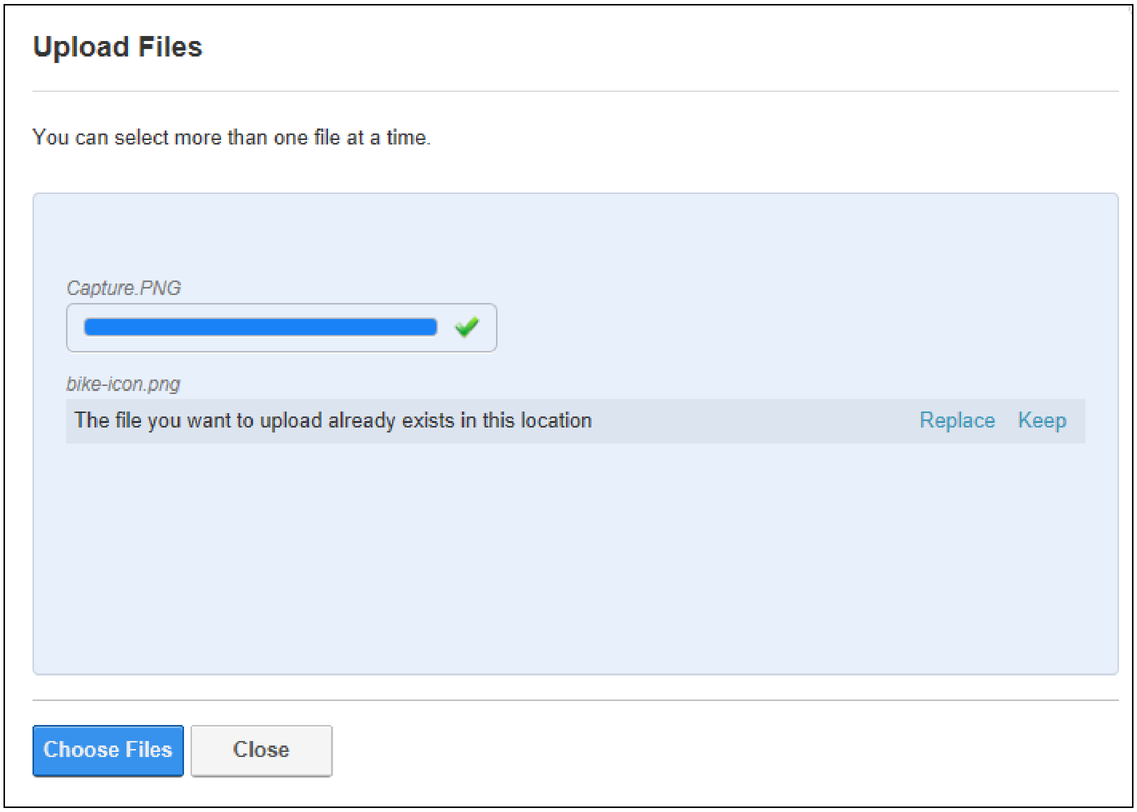
Uploading Files

How to upload one or more individual files or a zipped (compressed) file to the Digital Asset Management Pro module. These files can then be selected and viewed using various modules such as Links, Media, HTML / HTML Pro, etc. Authenticated users must be granted Add permission to the folder where the file or compressed zip file is being uploaded to.

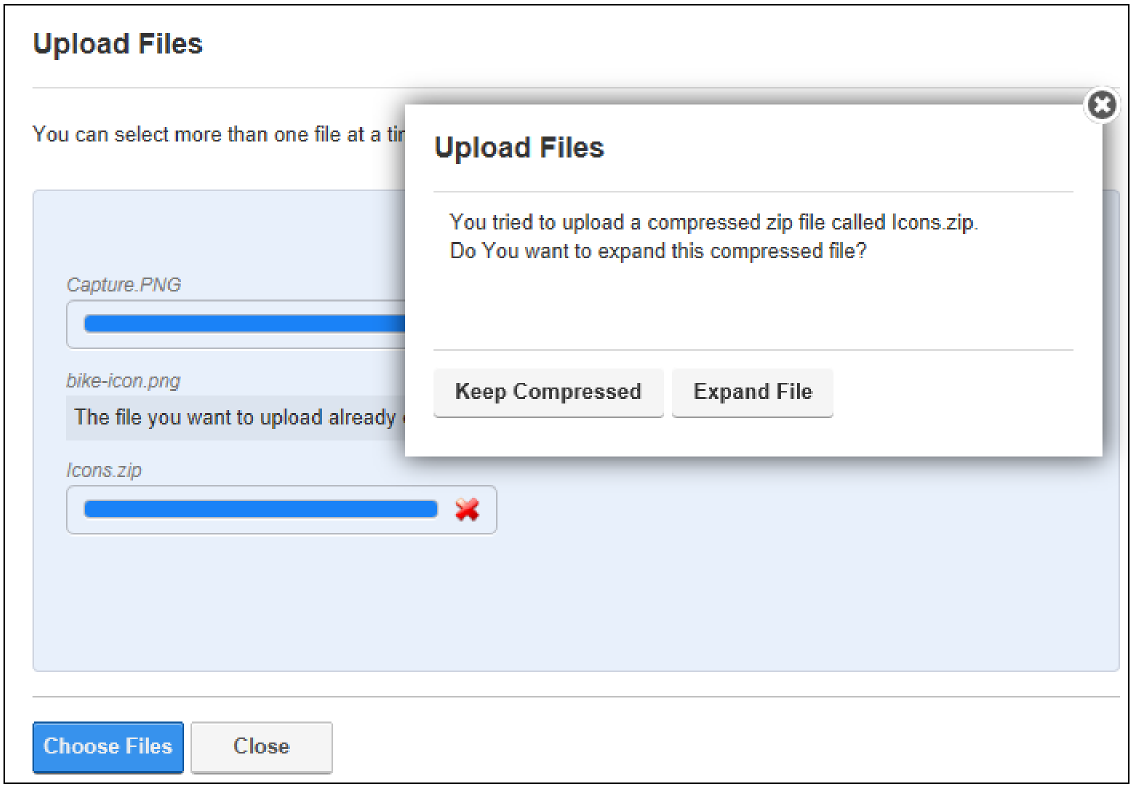
1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select a folder that you are authorized to upload files to. See "Navigating to and Selecting Folders". In this example, the selected folder has Content Approval enabled.
3. Click the **Upload Files** button located on the toolbar. This opens the Upload Files page.



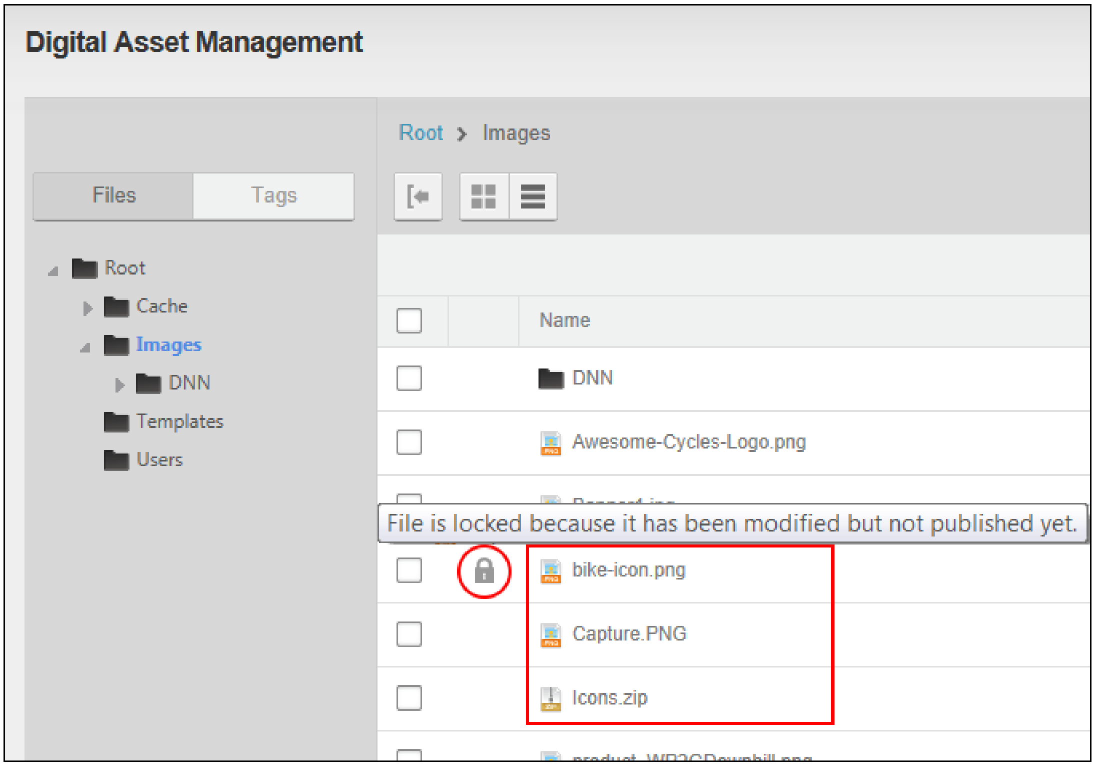
4. Click the **Choose Files** button and select a file from your computer.
   - If a file with the same name already exists, the message "The file you want to upload already exists in this location" is displayed.
     - Select **Replace** to upload the new version of this file. If workflow is enabled on the selected folder, this will begin the workflow process for the file. This option will be selected for this example.
     - Select **Keep** to keep the original file and cancel upload of the current file.



- If the chosen file is a compressed zip file a message reading "You tried to upload a compressed zip file called [filename]." is displayed and the following options are available:
  - **Keep Compressed**: Select to upload the single compressed zip file to the folder. This option will be selected for this example.
  - **Expand File**: Select to expand the file and upload all of the files within the compressed zip file as separate files to the folder.



5. Repeat Step 4 to upload additional files.
6. Click the **Close** button once you have chosen all the files to be uploaded. The uploaded files are now added to the Files Window of the selected folder. For this example, notice that the bike-icon.png file now displays the **Locked** icon which indicates it is in the workflow process. Also notice that the Icons.zip file is still compressed.



Folder Security Settings

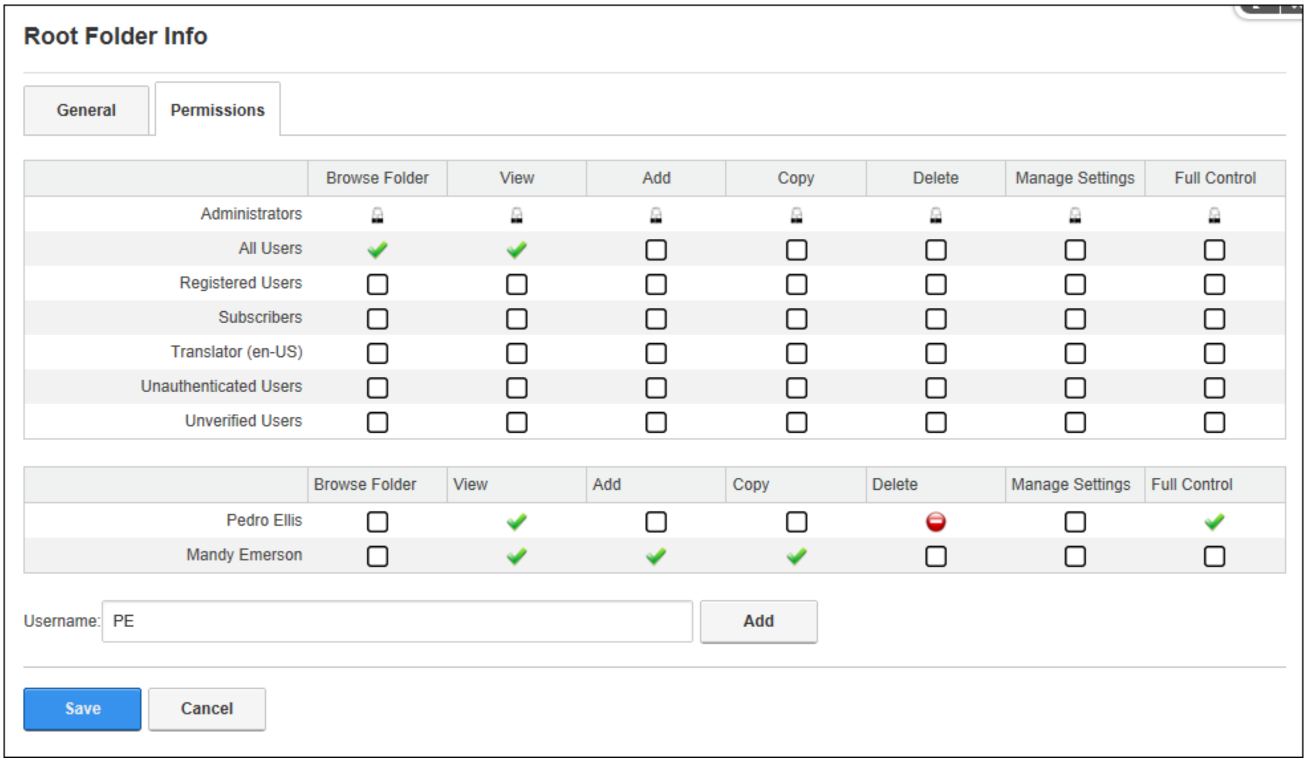
About Folder Security Settings

The Digital Asset Management Pro module enables authorized users to manage access to one or more folders by setting Folder Security Settings.

Here's a description of the different permissions that can be set:

- **Browse Folder**: Grant this permission to enable users to browse and select the files within this folder. Users are only granted permission to their personal folder by default. This enables them to manage their profile image, etc.
- **View**: Grant this permission to enable users to view the files within this folder which are displayed or linked to on the site. All Users are granted this permission by default.
- **Add**: Grant this permission to enable users to add files to this folder and any subfolders. Users can also add subfolders to this folder.
- **Copy**: Grant this permission to enable users to copy files to and from this folder.

- **Delete**: Grant this permission to enable users to delete a folder and/or its subfolders.
- **Manage Settings**: Grant this permission to enable users to manage folder settings.
- **Full Control**: Grant this permission to give users full control to perform all file and folder management task within the selected folder.

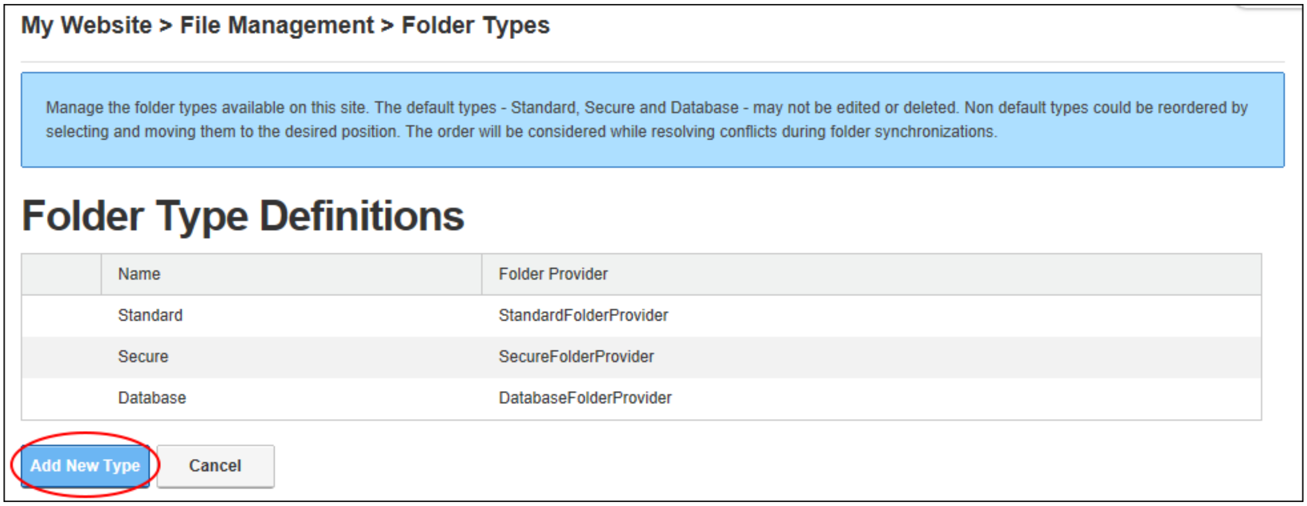


Adding an Amazon S3 Folder Type

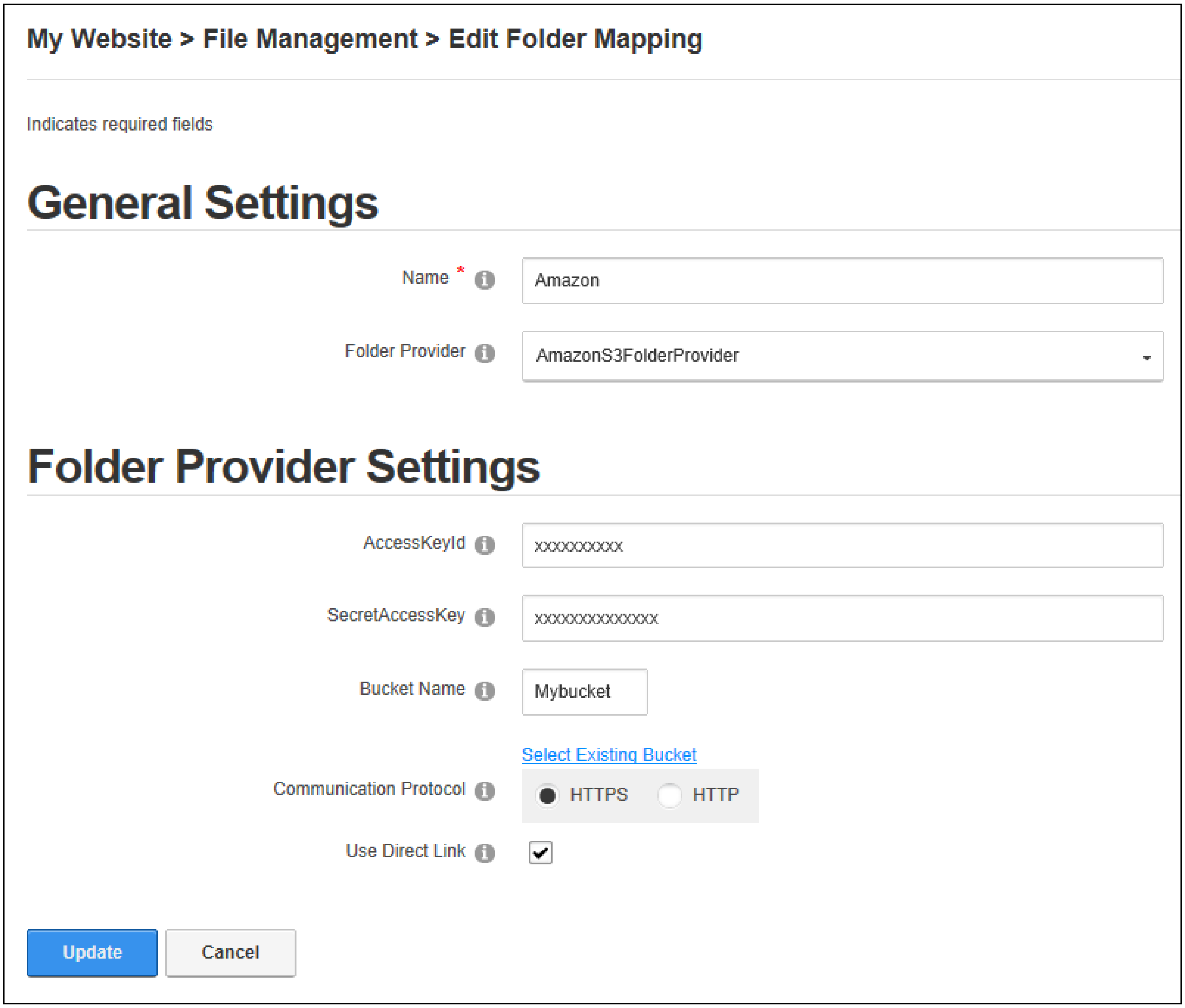
How to add an Amazon Simple Storage Service (Amazon s3) folder type to the Digital Asset Management Pro module. This enables you to store your files on the Amazon cloud using the paid Amazon S3 service.

Prerequisite. You must first sign up for an Amazon S3 account. For details and to sign up, go to http://aws.amazon.com/s3.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select **Edit** > **Manage Folder Types** from the module action menu.
3. Click the **Add New Type** button.



4. In the **General Settings** section, complete the following:
    1. In the **Name** text box, enter a name for the new provider. This name will show up in the Digital Asset Management module as Folder Type when you add new folders.
    2. At **Folder Provider**, select **AzureFolderProvider** from the drop down list. This will populate the Folder Provider Settings section below.
5. In the **Folder Provider Settings** section, complete the following:
    1. In the **AccessKeyID** text box, enter the key for your service.
    2. In the **SecretAccessKey** text box, enter the secret key for your service.
    3. At **Bucket Name**, select **<Refresh>** from the drop down list to populate the list with the names of the buckets that are available to store your files in - OR - Select New Bucket and manually enter the bucket name into the text box.
    4. At **Bucket Name**, select the bucket you want to store the files in.
    5. At **Communication Protocol**, select **HTTPS** if the files are located on a secure server or **HTTP** if the files are not located on a secure server.
    6. At **Use Direct Link**, mark the check box to allow the number of link clicks to be tracked by setting the path of files in this folder type to point directly to the real path - OR - unmark the check box to use a Link Click path link to the file.

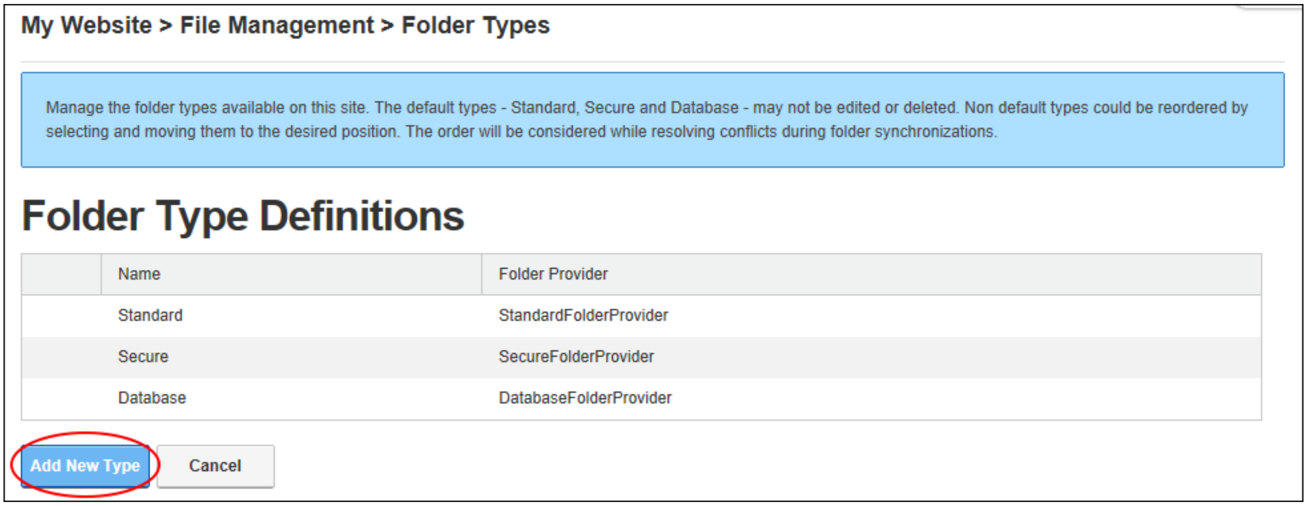


6. Click the **OK** button to confirm. This returns to the Folder Types list where the new Amazon S3 Folder Provider will be listed.

Adding a UNC Folder Type

How to add a UNC (Universal/Uniform Naming Convention) folder to the Digital Asset Management Pro module. A UNC path describes the location of a volume, directory, or file. UNC paths apply to all operating systems, are not case-sensitive and follow the format \\server\volume\directory\file.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select **Edit** > **Manage Folder Types** from the module action menu.
3. Click the **Add New Type** button.



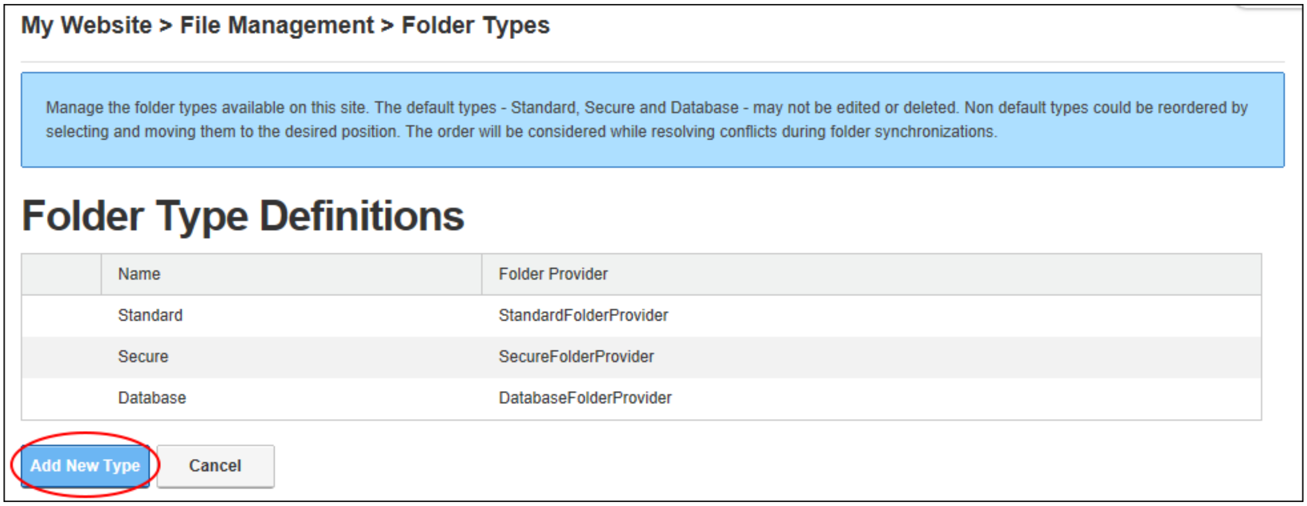
4. In the **General Settings** section, complete the following:
   1. In the **Name** text box, enter a name for this folder. This name will show up in the Digital Asset Management module as Folder Type when you add new folders.
   2. At **Folder Provider**, select **UNCFolderProvider** from the drop down list. This will populate the Folder Provider Settings section below.
5. In the **Folder Provider Settings** section, complete the following:
   1. In the **UNC Path** text box, enter the UNC path.
6. Click the **OK** button to confirm. This will now take you back to the Folder Types list where this new UNC Folder Provider will be listed.

Adding a Windows Azure Folder Type

How to add a Windows Azure folder type to the Digital Asset Management Pro module. This enables you to store your files on the Windows Azure cloud which is a paid service.

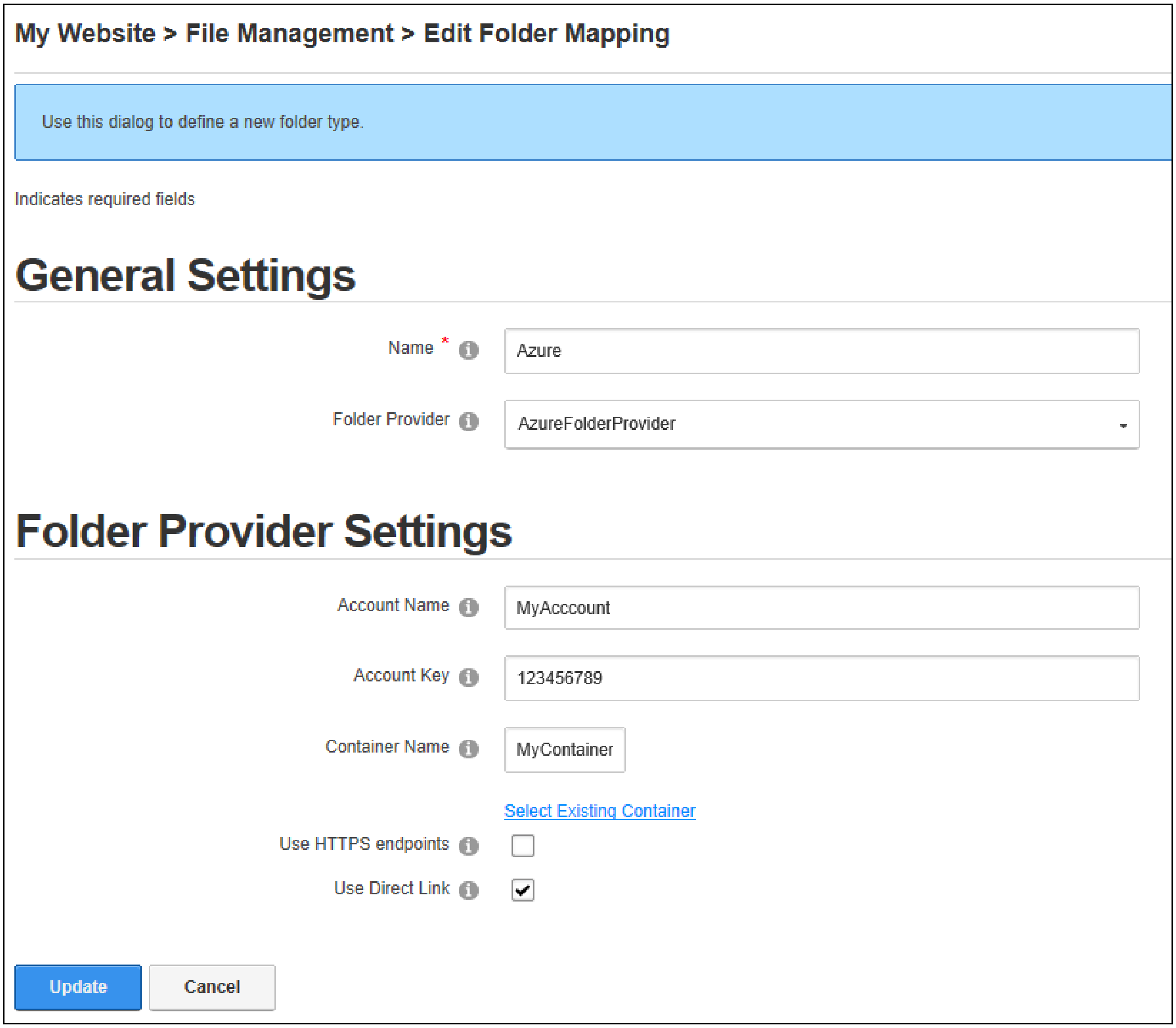
Prerequisite. You must create a Windows Azure account. For details and to sign up, go to http://www.microsoft.com/windowsazure/storage.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select **Edit** > **Manage Folder Types** from the module action menu.
3. Click the **Add New Type** button.



4. In the **General Settings** section, complete the following:
   1. In the **Name** text box, enter a name for the new provider. This name will show up in the Digital Asset Management module as Folder Type when you add new folders.
   2. At **Folder Provider**, select **AzureFolderProvider** from the drop down list. This will populate the Folder Provider Settings section below.
5. In the **Folder Provider Settings** section, complete the following:
   1. In the **Account Name** text box, enter your account name.
   2. In the **Account Key** text box, enter the account key for your service.
   3. At **Container Name**, select **<Refresh>** from the drop down list to populate the list with the names of the containers that are available to store your files in - OR - Select New Container and manually enter the container name into the text box.
   4. At **Container Name**, select the container you want to store the files in.
   5. At **Use HTTPS Endposts**, mark the check box to create this as a secure HTTPS folder - OR - unmark the check box to create a less secure HTTP folder.
   6. At **Use Direct Link**, choose from these options to determine the URL of files within this folder. mark the check box to point directly to Amazon/Microsoft cloud server. This option will allow you to track the

number of link clicks. - OR -unmark the check box create a Link Click path link to the file by pointing to the server where this application is hosted.



6. Click the **OK** button to confirm. This will now take you back to the Folder Types list where the new Azure Folder Provider will be listed.

Versioning

About Versioning

The Digital Asset Management Pro module includes file versioning that allows multiple versions of a file to be kept and provides users with the ability to delete or rollback to previous versions.

Important. Versioning is disabled if the file is in the workflow process.

Registered users must be granted Manage Settings permissions to the folder where the file is located.

Prerequisite. Versioning must be enabled for the folder where the file is located.

Related Topics:

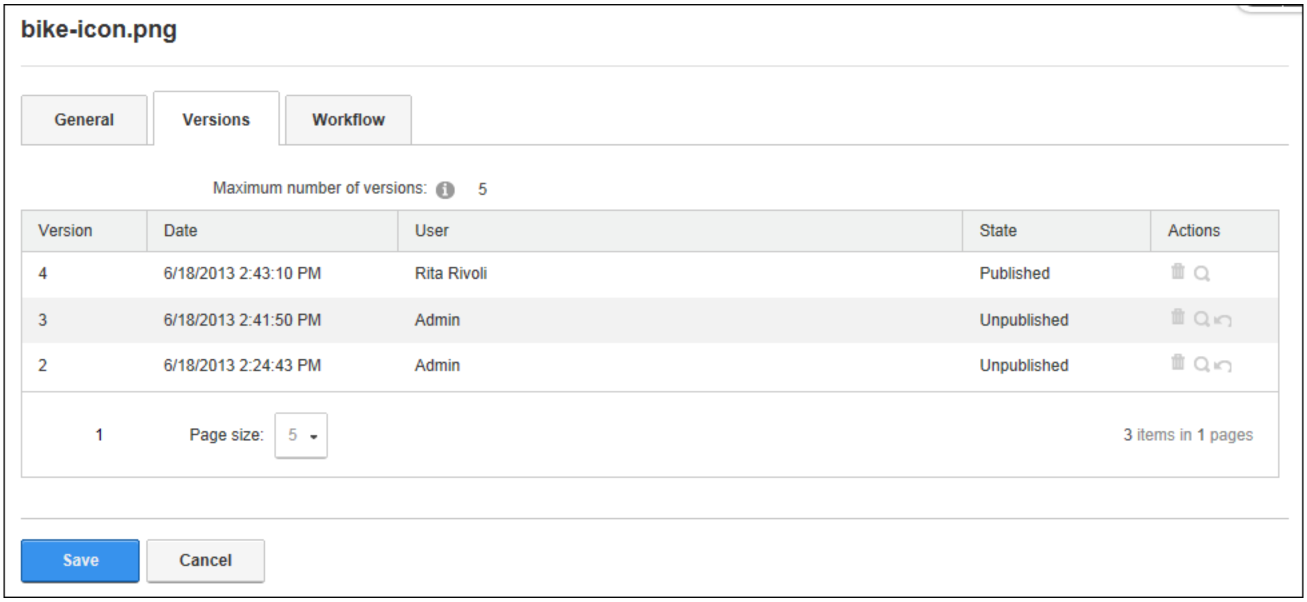
- See "Managing File Versions"
- See "Setting Number of Versions"
- See "Managing Folder Properties"

Managing File Versions

How to publish or rollback the version of a file in the Digital Asset Management module.

Registered users must be granted Manage Settings permissions to the folder where the file is located.

1. Navigate to Admin > **File Management** - OR - Go to Digital Asset Management Pro module.
2. Navigate to and select the folder where the required file is located.
3. Locate the file and right click on the file row and then select **View Properties** from the drop down list.
4. Select the **Versions** tab.
5. The following actions can be performed:
    - **Delete**: Click to delete a version. This will maintain the version order and keep the same version numbers however the deleted version will be removed. E.g. Deleting Version 3 from the below image would then only show Version 2 and Version 4 in the Version column. Note: The last version of a file cannot be deleted.
    - **Preview**: Click to preview a version.
    - **Rollback**: Click to rollback to this version. Selecting this option will add one new version of this file (e.g. Version 5) rather than move this version up to the latest position.



Setting Number of Versions

How to set the maximum number of versions of an image to keep for the Digital Asset Management module.

1. Select **Manage** > **Settings** from the module actions menu.
2. Go to the **HTML Module Settings** tab.
3. In the **History Maximum** text box, enter the maximum number of versions to save. The default value is 5.
4. Click the **Update** button.

Related Topics:

- See "About Versioning"

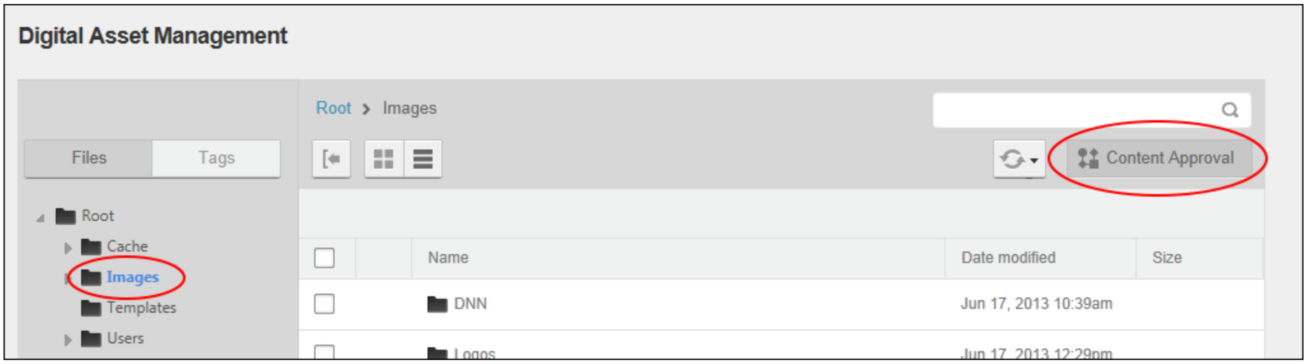
Workflow

About Workflow

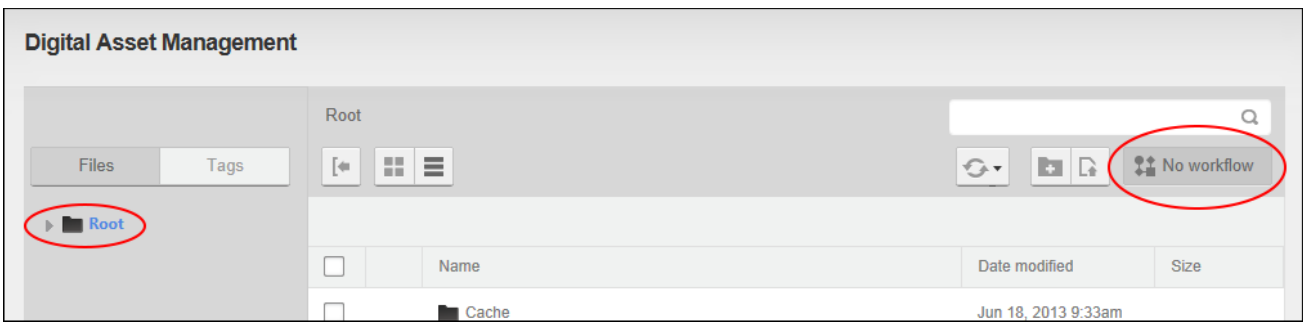
The Digital Asset Management Pro module includes a single fixed workflow named "Content Approval" that allows users to update files and have them approved before they are published on the site. Workflow, which is disabled on new DNN installations by default, can be enabled for one or more folders with the same workflow being used across all enabled folders. The workflow commences when an existing file is edited and it includes three workflow states called Draft, Ready For Review and Published. These three states cannot be deleted, nor can any additional states be added. Once a file enters the Ready For Review state a notification message is sent to reviewer notifying them that the file is ready for review. Once the review has taken place the file will either be rejected or published and the user who uploaded the Draft file notified of this outcome.

Prerequisite. Workflow must be enabled on the folder that the file is being uploaded too (See "Managing Folder Properties") and roles/users must be selected for the reviewer role (See "Configuring Workflow")

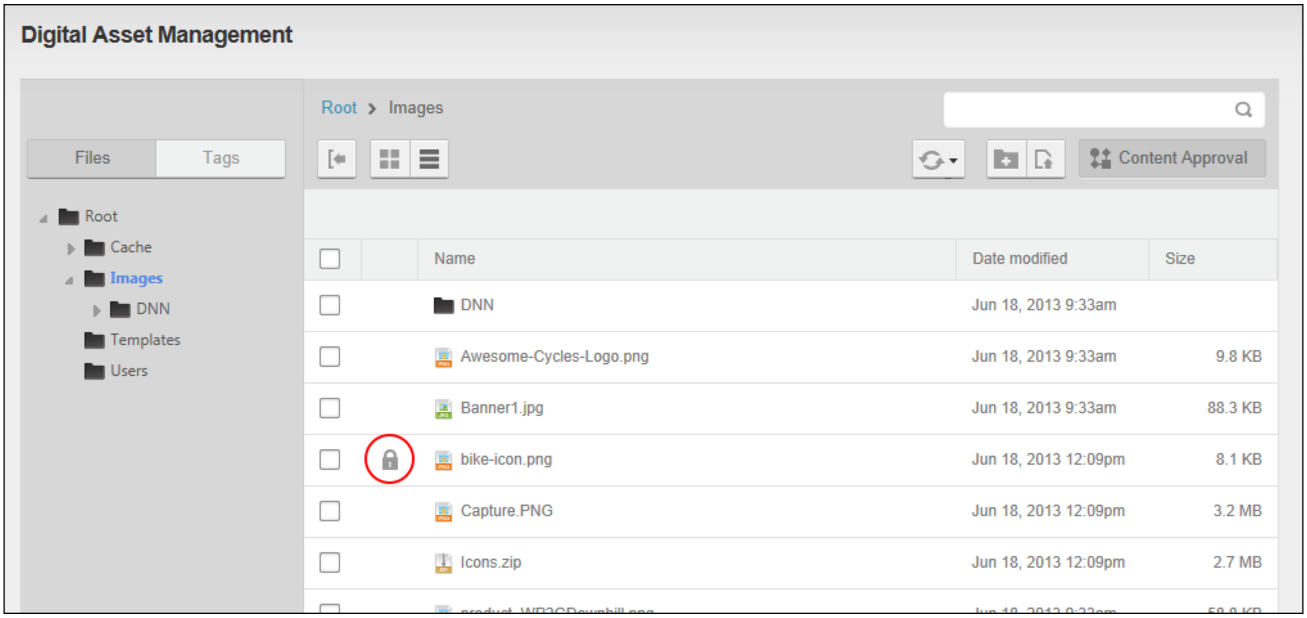
Once workflow is enabled for a folder (See "Managing Folder Properties") the name of the workflow (e.g. Content Approval) is displayed whenever that folder is selected.



Likewise, the "No Workflow" button will be displayed when a folder that doesn't have workflow enabled is selected.



The workflow process begins whenever a new version of an image is uploaded to a folder that has workflow enabled. Once workflow commences, the file will display the **Locked** icon which indicates it is in the workflow process and is locked from further editing until the process is completed.

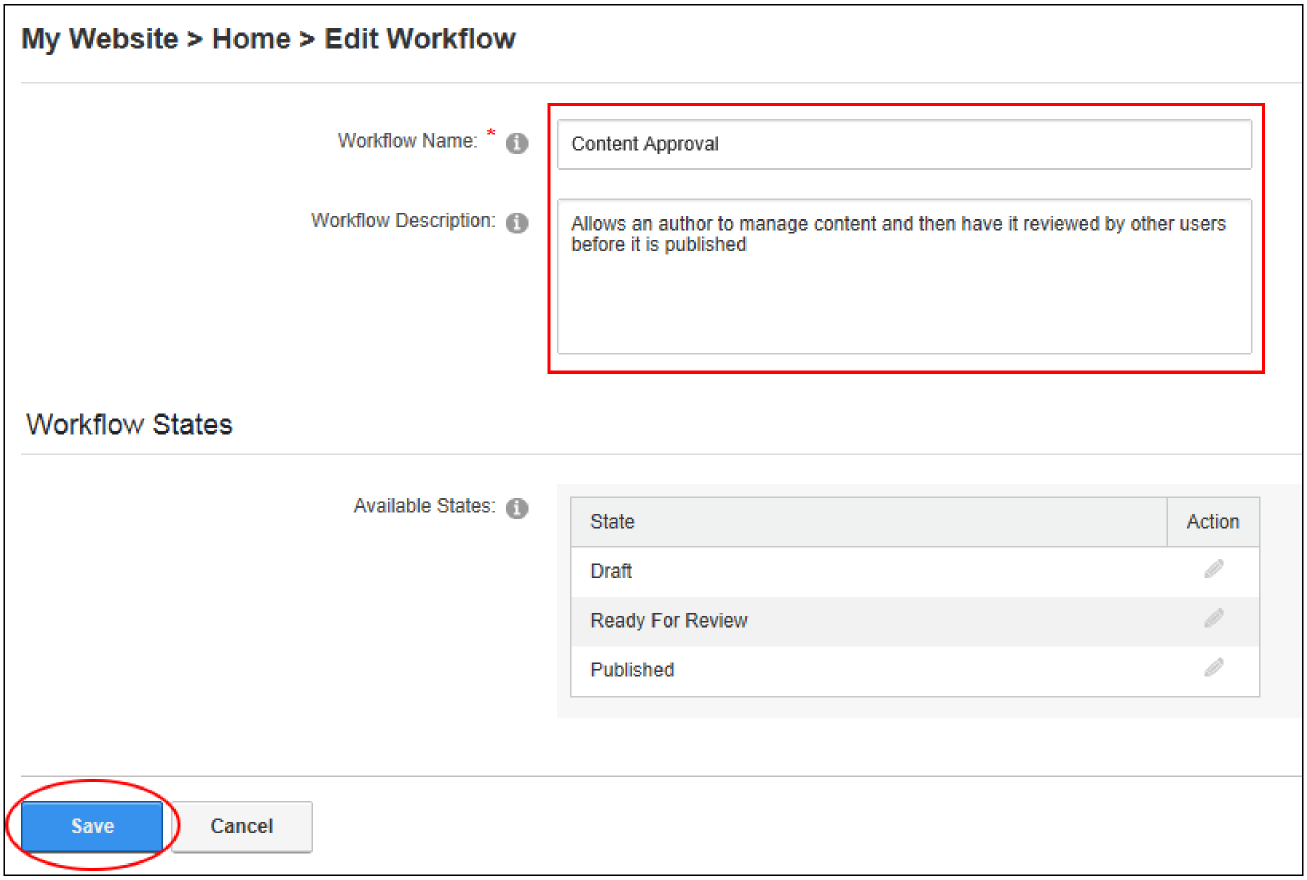


Configuring Workflow

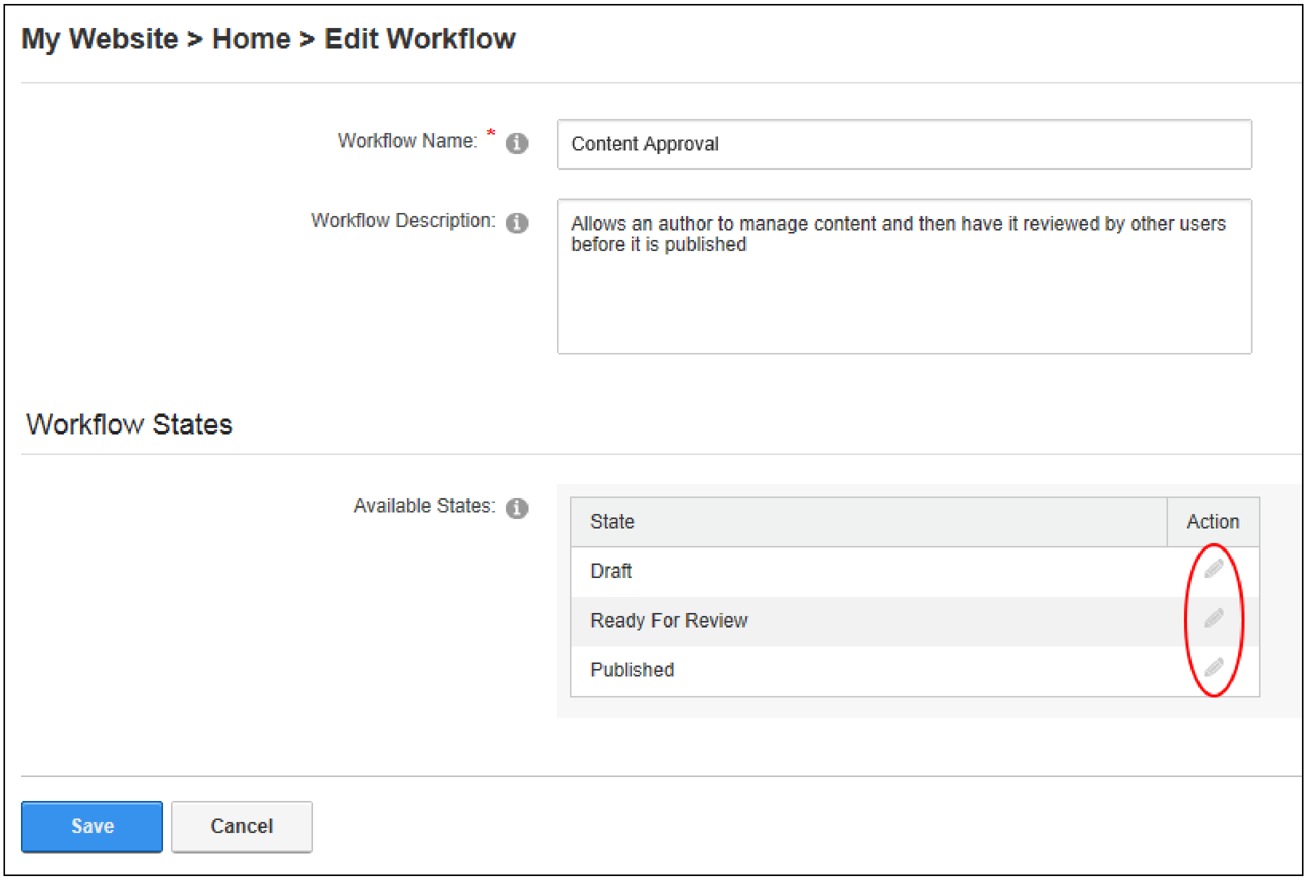
How to configure the workflow that will be applied to all folders that workflow is enabled on. By default, only Administrators are selected as reviewers for workflow so here you can select the additional roles and/or users who can review files in the Ready For Review state. Additional settings that can be configured include modifying the name and description of the workflow, modifying the name of any workflow state and modifying the subject or body of the notification messages that are sent to reviewers for the Draft and Ready For Review states.

Registered users must be granted Full Control permissions to Digital Asset Management Pro.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Select **Edit** > **Edit Workflow** from the module action menu. This will open the Edit Workflow page. Note: You need to be in Edit mode.
3. **Optional.** The following workflow details can be edited:
   1. In the **Workflow Name** text box, edit the default workflow name (Content Approval) as required. This name is displayed in the Digital Asset Management Pro toolbar when the selected folder has workflow enabled.
   2. In the **Workflow Description** text box, edit the description as required.
   3. Click the **Save** button.

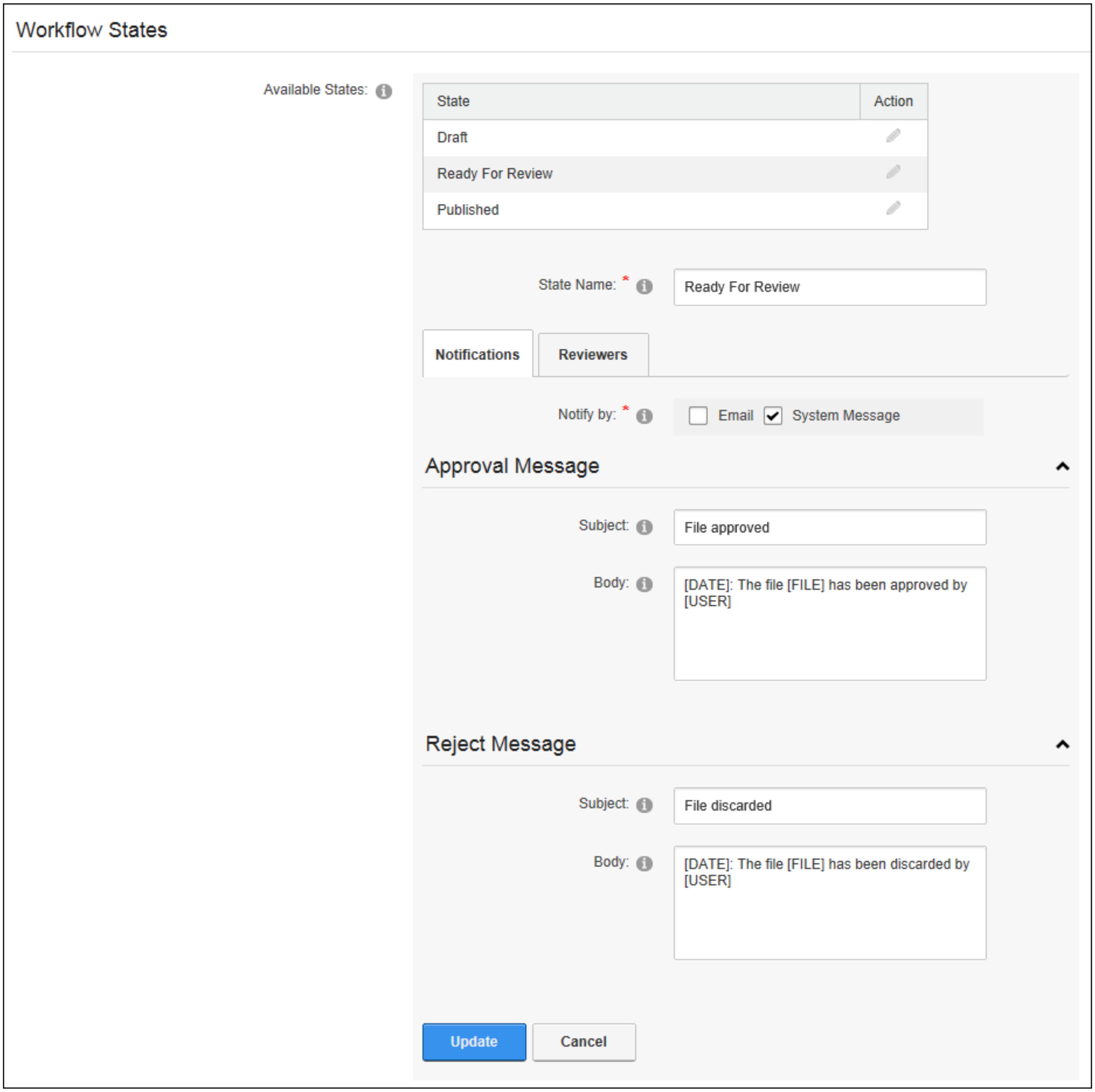


4. In the **Workflow States** section, click the **Edit** button beside a workflow state. Each state offers these different options as outlined below.

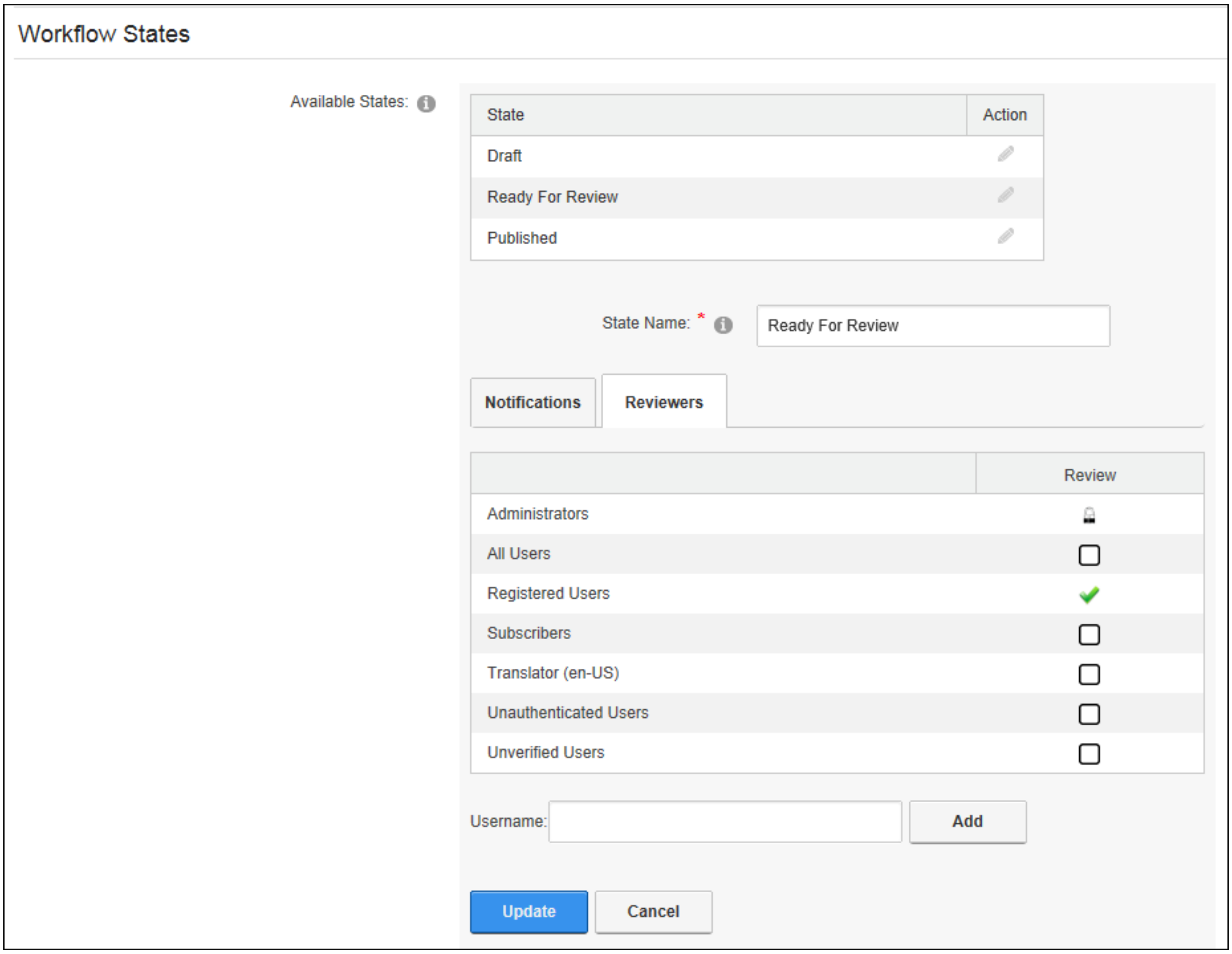


- The **Draft** state has the following edit options:
  1. At **Notify By**, mark the check box to send notification by either or both **Email** (this will send to the email address associated with the user's account) and **System Message** (this will send a notification to the user's profile inbox).
  2. Expand the **Approval Message** section and edit either or both the subject title or message body of the message that is sent to Reviewers whenever a draft file is approved and ready for review.
- The **Ready For Review** state has the following edit options:
  1. Select the Notifications tab.
     1. At **Notify By**, mark the check box to send notification by either or both **Email** (this will send to the email address associated with the user's account) and **System Message** (this will send a notification to the user's profile inbox.
     2. Expand the **Approval Message** section and edit either the subject title or message body of the notification that is sent to the user who uploaded the draft file when the file is approved.

3. Expand the **Reject Message** section and edit either the subject title or message body of the notification that is sent to the user who uploaded the draft file when the file is rejected and has been discarded.



2. Select the Reviewers tab.
    1. Select the roles/usernames that are **Granted** or **Denied** Review permissions. The Administrators role is selected by default.



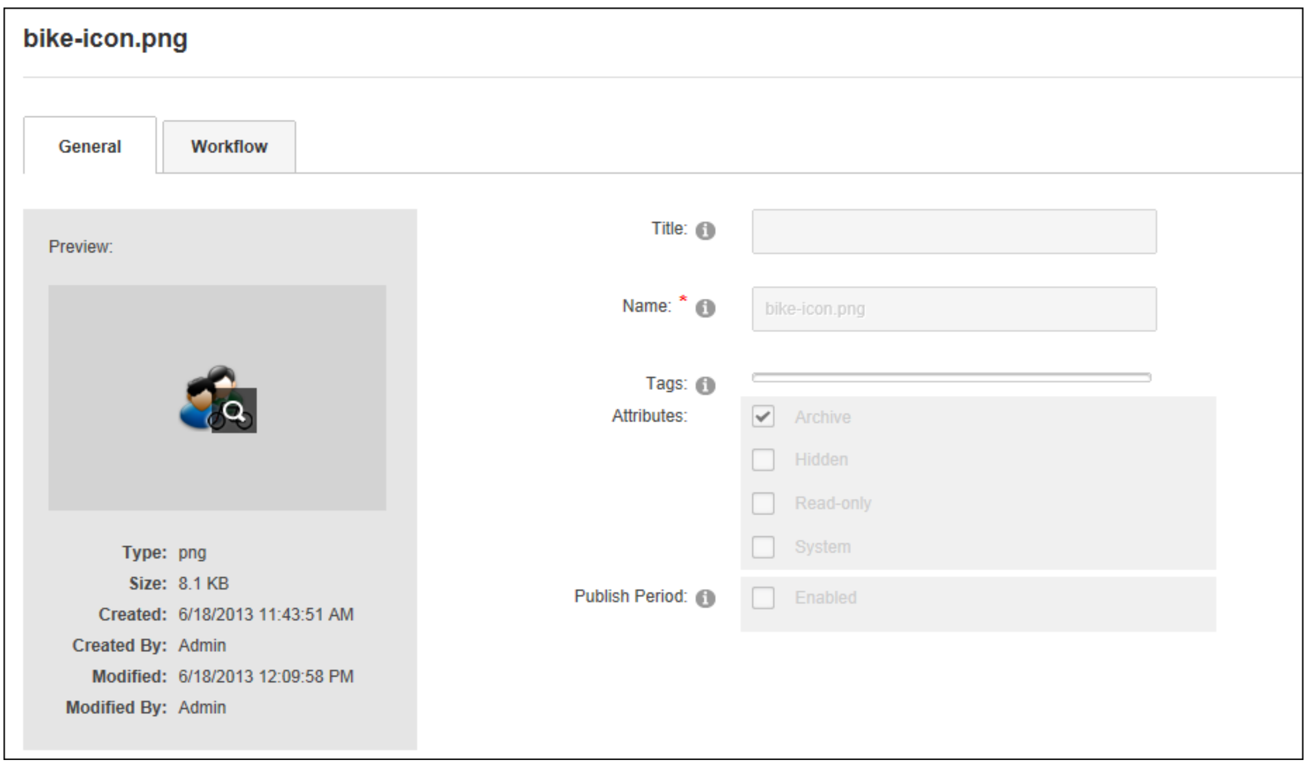
5. Repeat Step 4 to update additional workflow states.
6. Click the **Update** button.

Publishing or Discarding a Draft File

Once workflow commences the file locked and will remain in the Draft state until the draft is either approved or discarded. Publishing a file does not publish it live on the site, but moves it onto the next state of workflow (Ready For Review) and sends a notification message is sent to reviewers informing them that the file is awaiting review. Note:

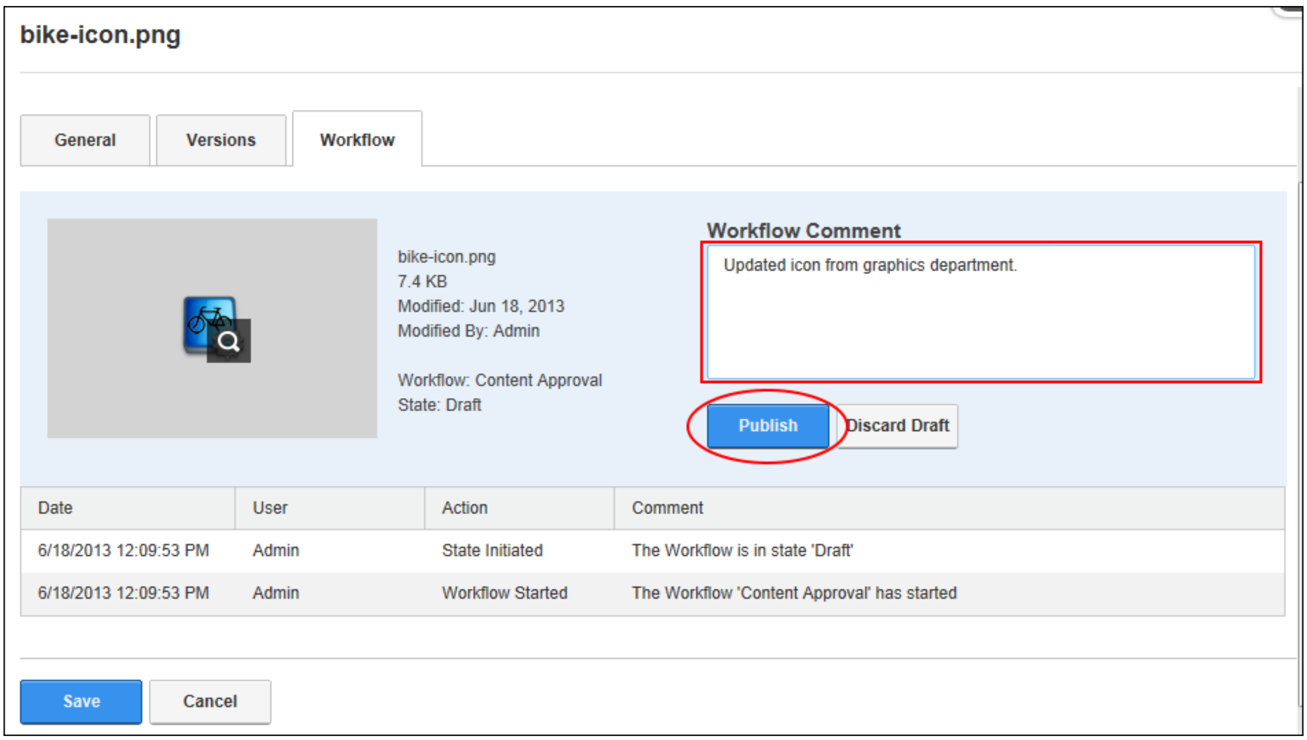
When performing group updates on multiples files, if the workflow is in different stages (i.e. one is pending to approve, another one is in draft) you will be unable to make updates. Editors require Add permissions to a folder.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder where file is located. .
3. Locate the file or files.
4. Right click on the file row and select **View Properties** - OR - Mark the check box beside the file and click the **View Properties** button in the Files Window Tool Bar - OR - Select **Group Updates** from either the drop down menu or the Files Window Tool Bar if you are updating multiple files.
5. If you are updating a single file then a preview of the currently published version of the file is displayed. If the file is an image a thumbnail image is displayed, for other file types an icon of the file type is displayed. In either case the **Preview** button allows you to view the file in details.



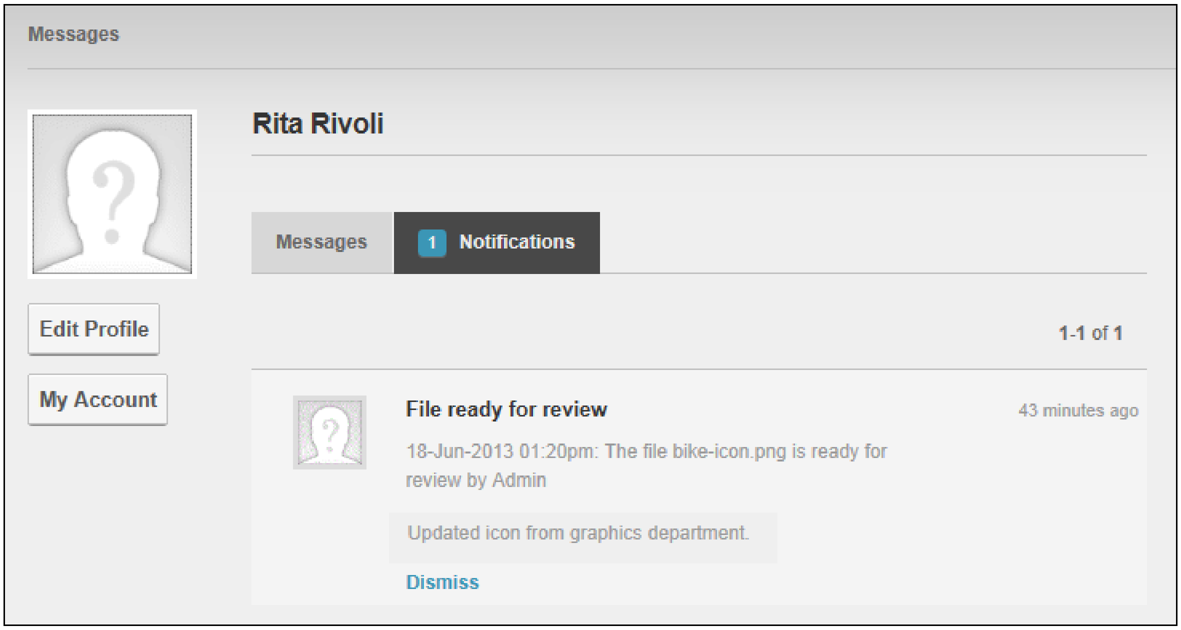
6. Select the Workflow tab to view the unpublished version of the file and view the state of workflow that the file is currently in. E.g. Workflow has started and the Draft state has been initiated. Again, the **Preview** button is available for single file updates allowing you to preview the file.

7. In the **Workflow Comment** text box, enter a comment for the file.
8. Select from the following options to complete the Content Approval workflow for this file:
   - **Publish**: Select to publish this draft version of the file. This will move the workflow forward to the "Ready For Review" state and send a notification message to Reviewer. Since the file is not yet published the **Locked** icon will remain beside the file.
   - **Discard Draft**: Select to discard the unpublished file and keep the currently published version as is. This removes the **Locked** icon from the file and completes the workflow process for this file.

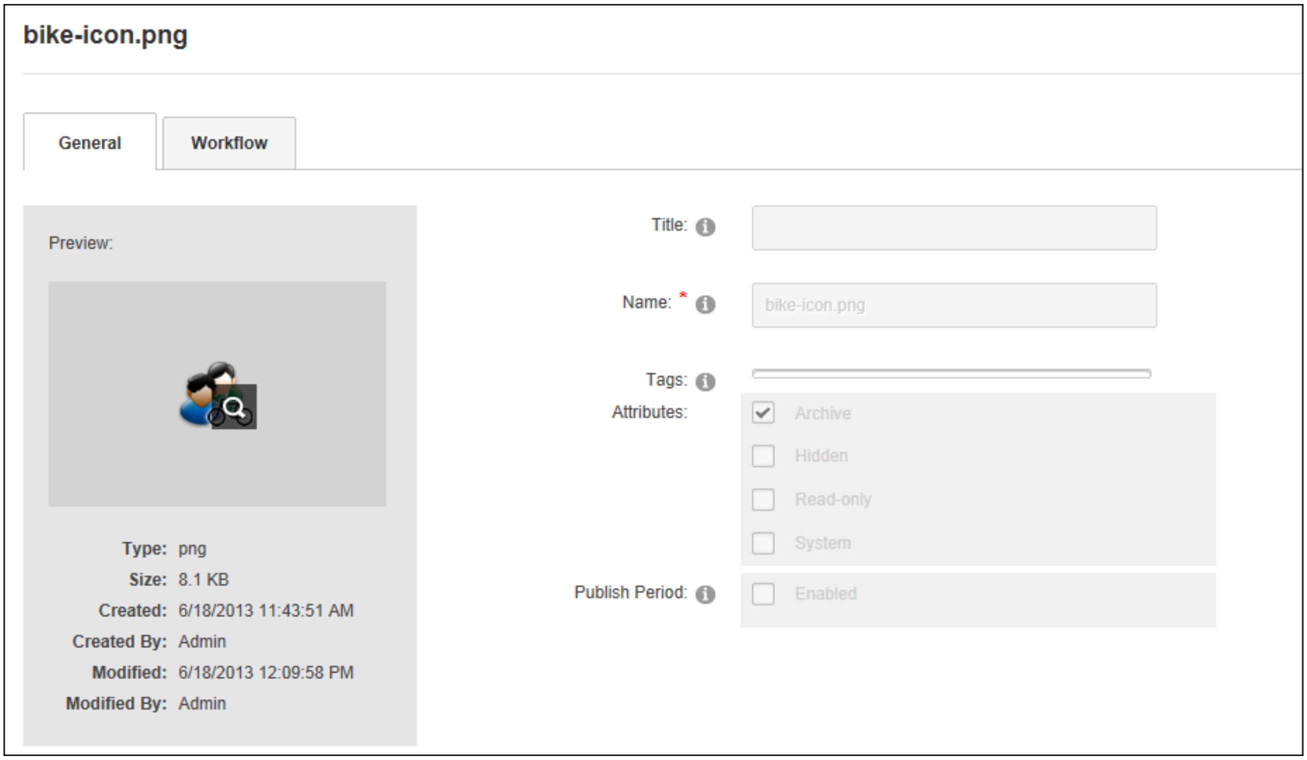


Approving or Rejecting a File

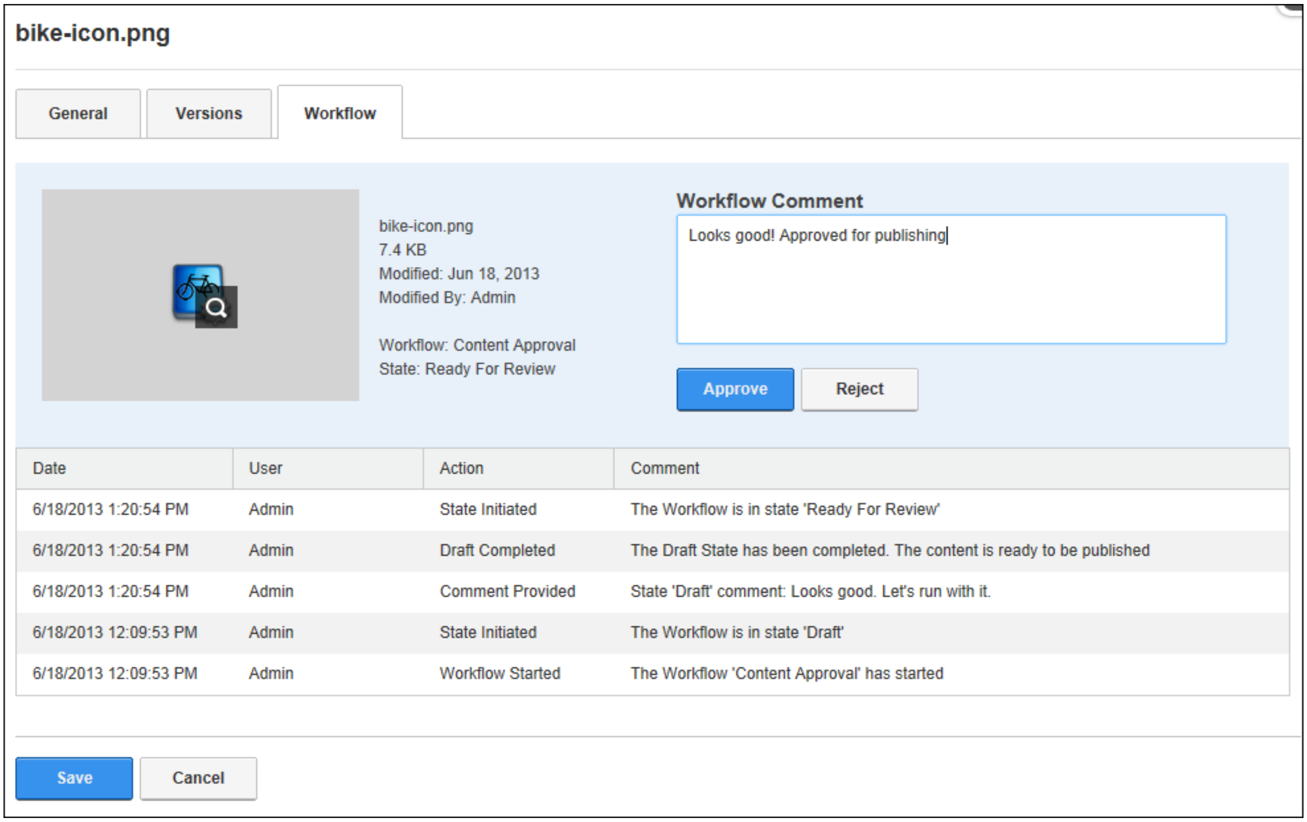
Once a draft has been published (See "Publishing or Discarding a Draft File") the Ready For Review state is initiated and Reviewers will receive notification that the file is ready for review. Reviewers must be granted Read permission to the folder and must be added to the Reviewer role for workflow.



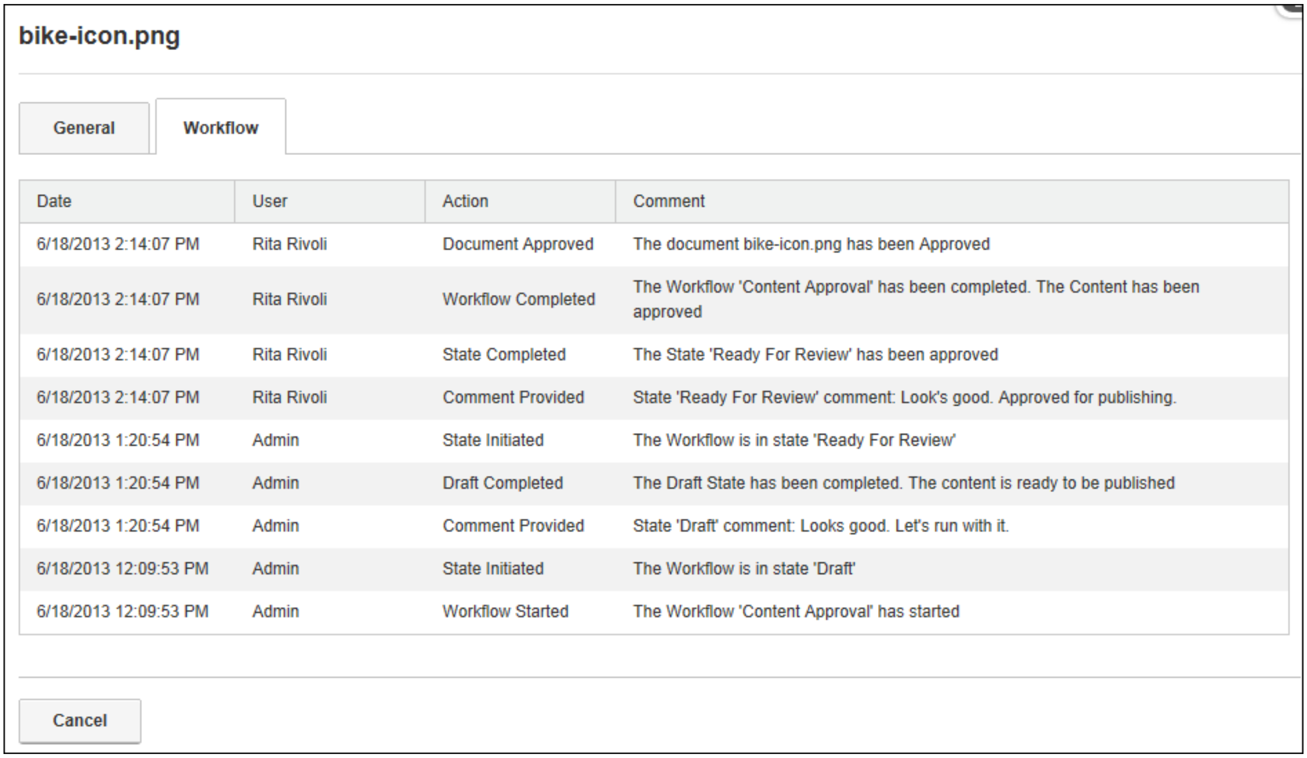
1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Navigate to and select the folder where file is located.
3. Locate the file.
4. Right click on the file row and select **View Properties** - OR - mark the check box beside the file and click the **View Properties** button in the Files Window Tool Bar - OR - Select **Group Updates** from either the drop down menu or the Files Window Tool Bar if you are updating multiple files.
5. On the General tab, a preview of the currently published version of the file is displayed. If the file is an image a thumbnail image is displayed, for other file types an icon of the file type is displayed. In either case the **Preview** button allows you to view the file in details.



6. Select the Workflow tab to view the unpublished version of the file and view the state of workflow that the file is currently in. E.g. Workflow has started and the Draft state has been initiated. Again, the **Preview** button allows you to preview the file.
7. In the **Workflow Comment** text box, enter a comment for the file.
8. Select from the following options:
    - Click the **Approve** button to approve this file. This removes the **Locked** icon from the file and the unpublished file that is displayed on the Workflow tab will now be published. The original file will only be kept for folders that have versioning enabled. This is the option selected for this example. The user who published the file will be notified that the file was approved.
    - Click the **Reject** button to reject and discard the unpublished file and keep the original file. This removes the **Locked** icon from the file and the workflow process for this file is completed. The user who published the file will be notified that the file was rejected.

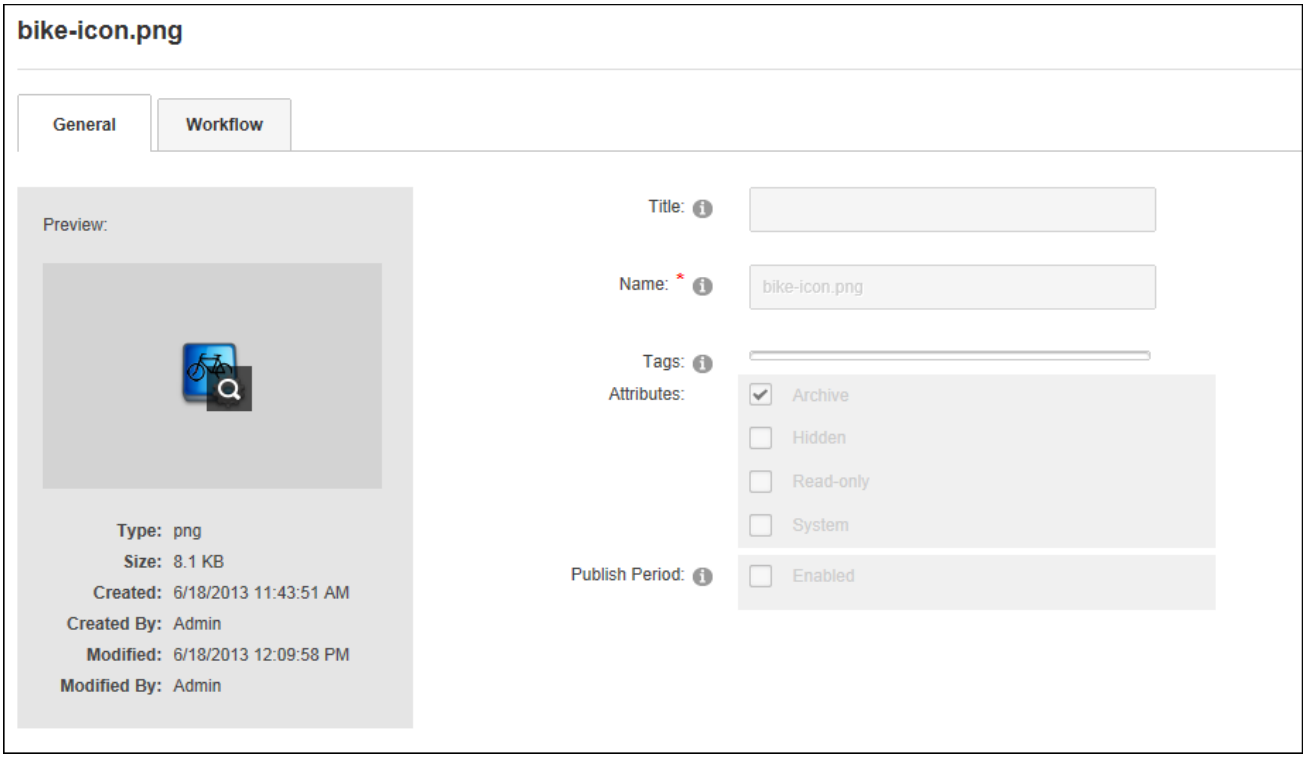


The Workflow history log is updated with the action, in this example the file was Approved and the ability to perform further workflow actions is removed.



Date	User	Action	Comment
6/18/2013 2:14:07 PM	Rita Rivoli	Document Approved	The document bike-icon.png has been Approved
6/18/2013 2:14:07 PM	Rita Rivoli	Workflow Completed	The Workflow 'Content Approval' has been completed. The Content has been approved
6/18/2013 2:14:07 PM	Rita Rivoli	State Completed	The State 'Ready For Review' has been approved
6/18/2013 2:14:07 PM	Rita Rivoli	Comment Provided	State 'Ready For Review' comment: Look's good. Approved for publishing.
6/18/2013 1:20:54 PM	Admin	State Initiated	The Workflow is in state 'Ready For Review'
6/18/2013 1:20:54 PM	Admin	Draft Completed	The Draft State has been completed. The content is ready to be published
6/18/2013 1:20:54 PM	Admin	Comment Provided	State 'Draft' comment: Looks good. Let's run with it.
6/18/2013 12:09:53 PM	Admin	State Initiated	The Workflow is in state 'Draft'
6/18/2013 12:09:53 PM	Admin	Workflow Started	The Workflow 'Content Approval' has started

When a user returns to the General tab, the newly published file is now displayed.



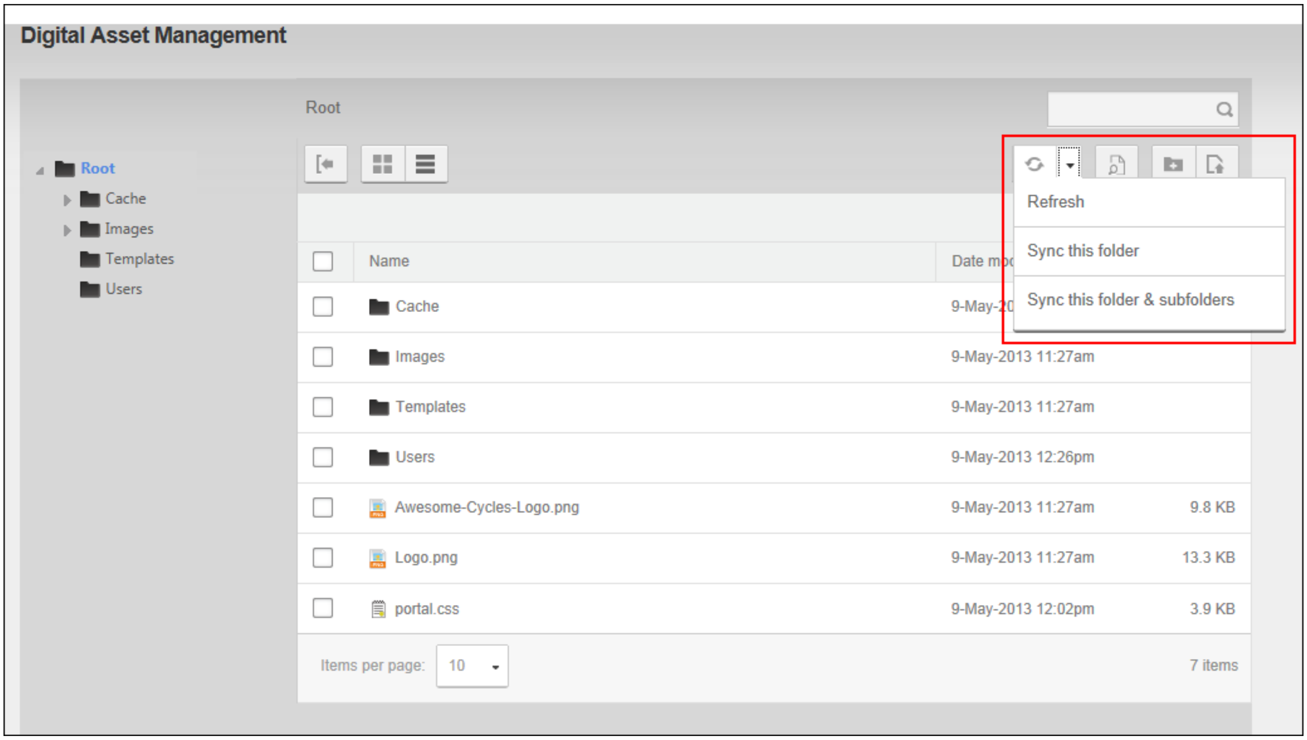
Administrators

Synchronizing Folders

How to synchronize one or more folders of the Digital Asset Management Pro module to ensure the folders listed match the folder structure within the database. This may be required when folders are uploaded using FTP directly to the database. Restricted to Administrators.

1. Navigate to Admin > **File Management** - OR - Go to a Digital Asset Management Pro module.
2. Click the **Sync** button on the toolbar and then select one of these options from the drop down list:
    - **Refresh**: Select to refresh the files within a selected folder of the Digital Asset Management module so the file information in the database matches the files on the server. This may be required if files have been uploaded via FTP
    - **Sync this folder**: Select to synchronize the folder structure and files of the selected folder only.
    - **Sync this folder & subfolders**: Select to synchronize the folder structure and files of the selected folder and all subfolders.

Tip: Click on the **Sync** button again to close the drop down menu.



Installing and Configuring WebDav

About WebDAV

WebDav (Web Distributed Authoring and Versioning) is a HTTP extension of the Hypertext Transfer Protocol that allows users to collaboratively edit and manage Microsoft Office documents on the server using the Document Viewer or the Admin > File Management page. See "Editing a Document"

When a user clicks on a document, the user must be asked if he / she wants to open the document in read only mode or edit mode. If the user selects edit mode, the file must be checked out and locked until the user saves the content and closes the file. Once the file is closed the document must not be locked nor checked out.

Installing and Enabling WebDAV

How to install and enable WebDAV on a DNN Server.

Server Components

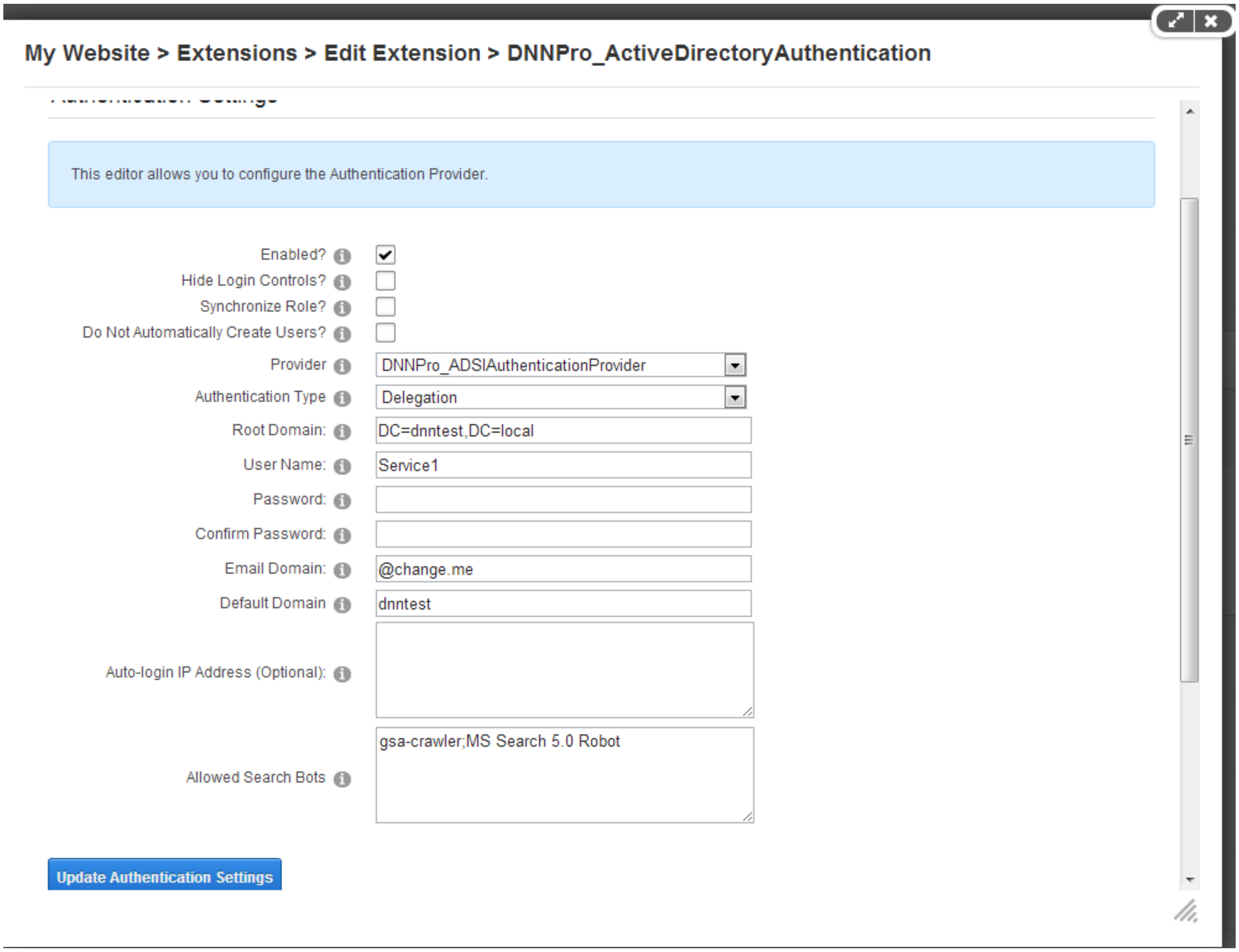
DNN Components

- Install the Active Directory Authentication Provider
- Enable and configure the Active Directory Authentication Provider using your own data to domain, access users and email domain.

Notes on setting DNN Active Directory Authentication:

- The Root Domain must be a reference to the domain name (not to domain controller). i.e. DC=-=dnntest,DC=local
- The User Name must be the name of a user with READ permission allowed on domain. If the user is member of Domain Users and it is not locked should be enough
- The Password is the password of the above user
- The Email Domain is the business email domain, not any particular email address. I.e. “@dnncorp.local” or “@change.me”

Follow the extra steps indicated in the post https://dnnauthad.codeplex.com/documentation



Data example to configure the Active Directory Authentication Provider

DNN OpenFromServer component

To allow access to WebDAV request to our OpenFromServer component, we have to perform the following command.

1. Open a Command Prompt as Administrator and run one of the follow:
   - To set all IIS sites:

     ```
     %windir%\system32\inetsrv\appcmd.exe set config -sec-
     tion:system.webServer/modules -runManagedModulesForWebDavRequests:true
     ```
   - To set a specific IIS Site:

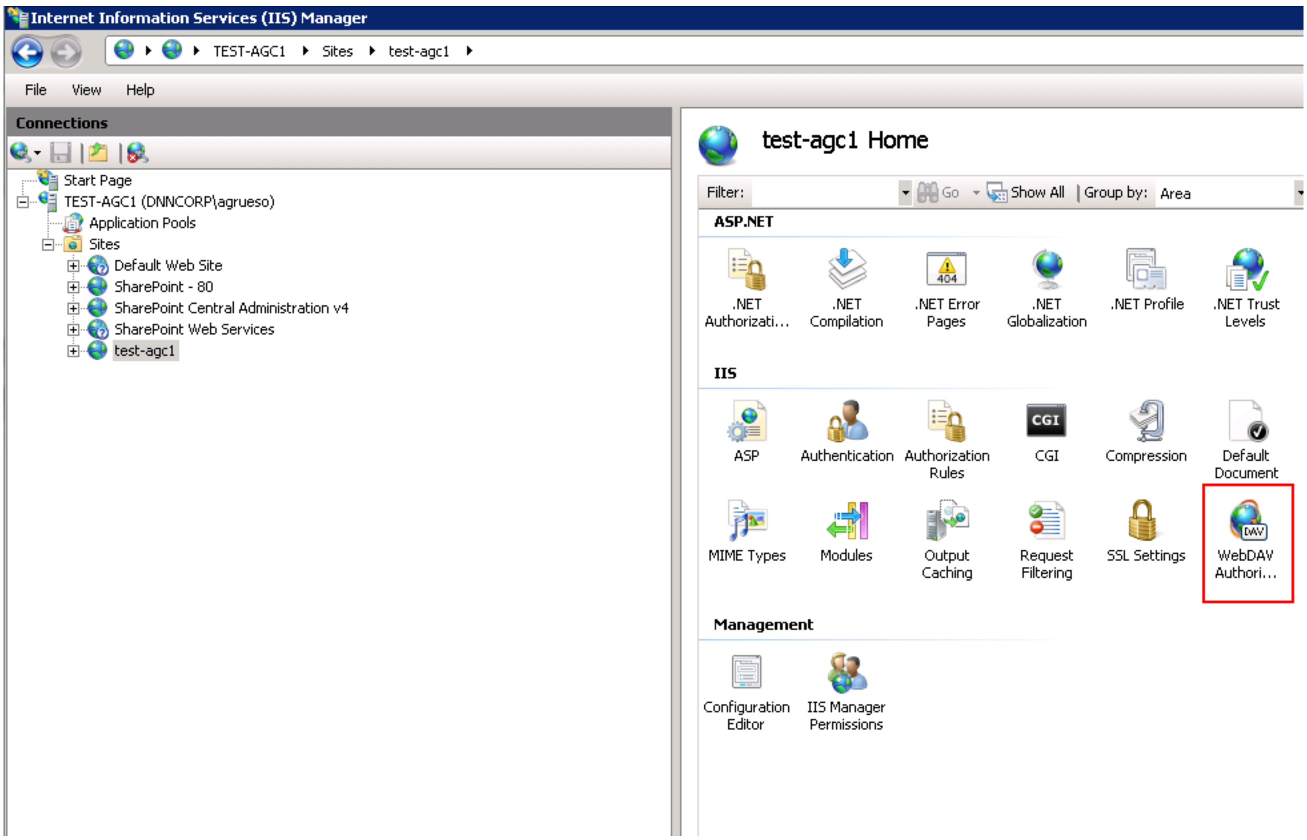
     ```
     %windir%\system32\inetsrv\appcmd.exe set config IIS_Site_Name -
     ```

```
section:system.webServer/modules -run-
ManagedModulesForWebDavRequests:true
```

IIS Components

Enabling WebDAV

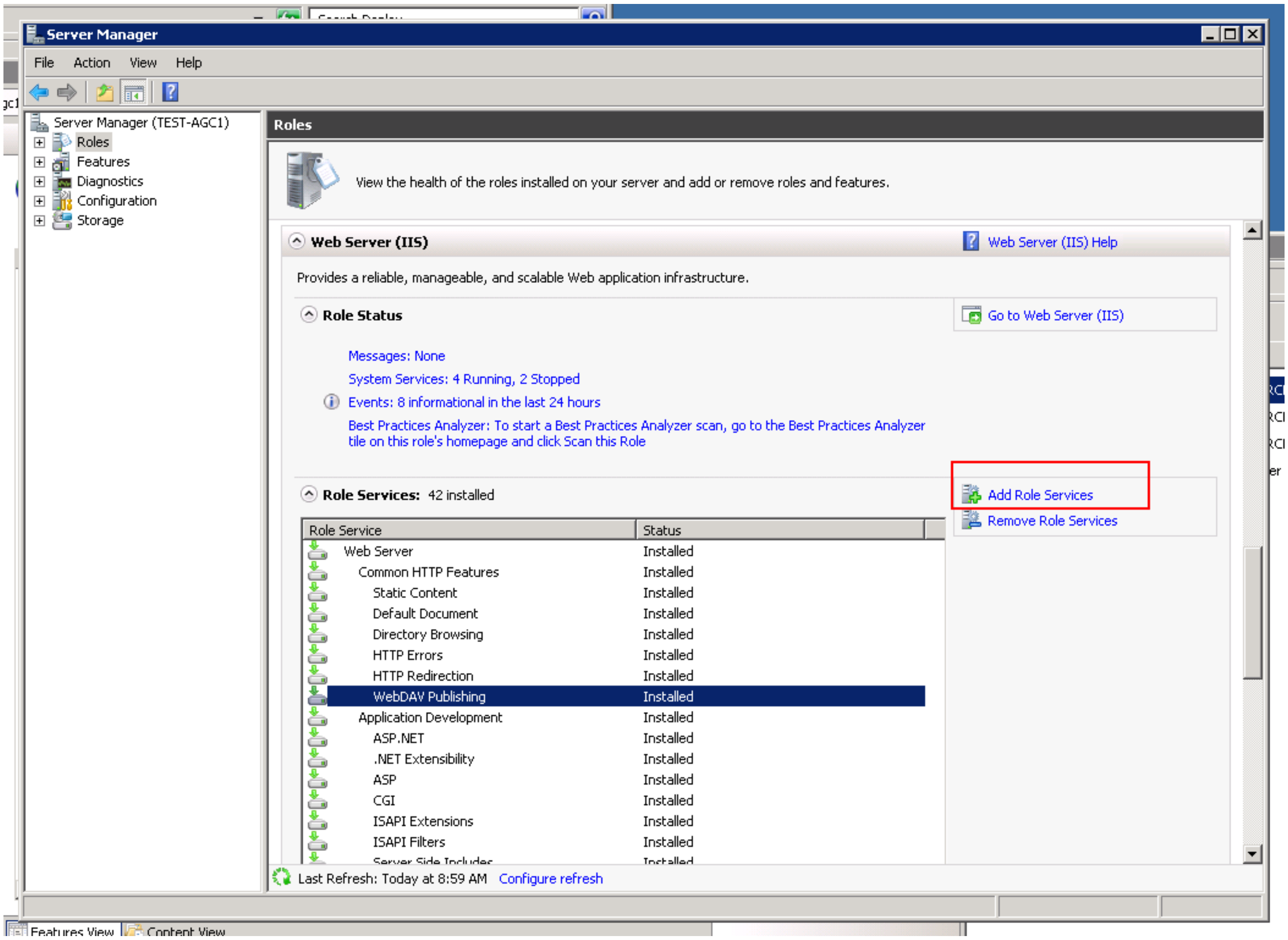
1. On IIS, you must enable WebDAV on IIS. See the following image to locate WebDAV settings



WebDAV settings location on IIS

Adding the WebDAV Feature

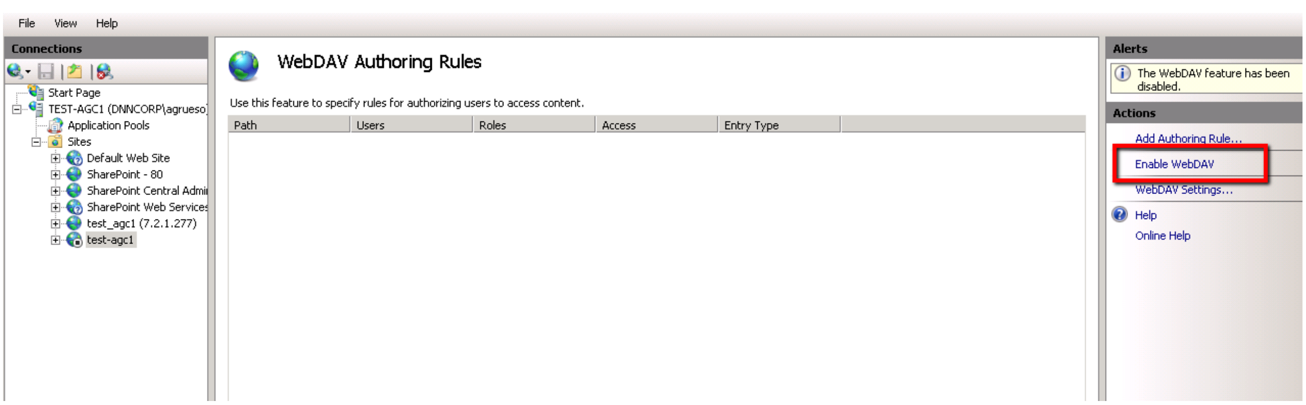
If WebDAV does not appear, you need to add the WebDAV feature as a Role Service from Web Server IIs role else you can move to step 2. Follow the next image to know where to add the feature on Windows Server Manager



Windows Server Manager showing where WebDAV can be installed

Enabling WebDAV

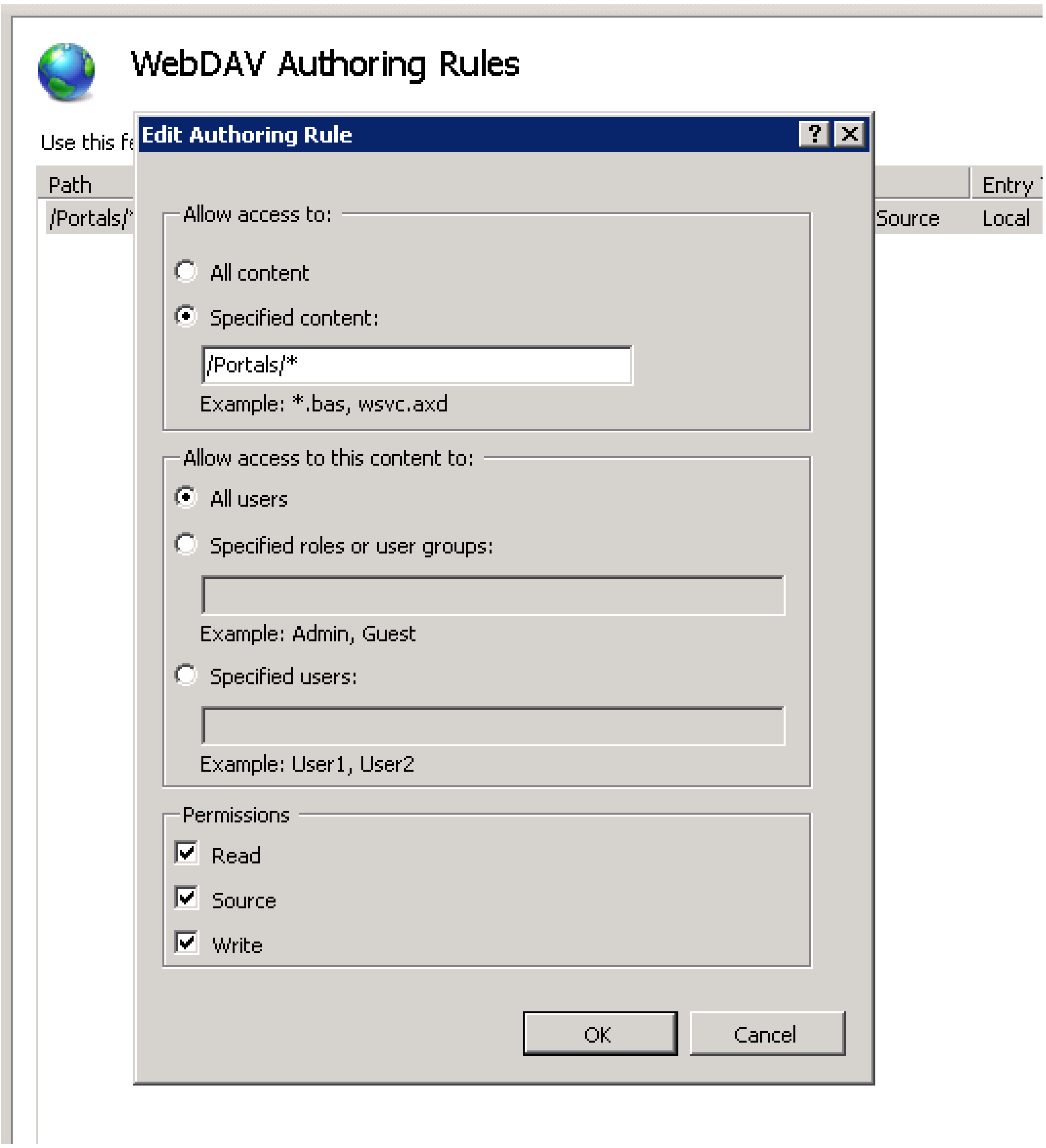
1. On WebDAV Authoring rules panel, click the Enable WebDAV link on right column.



IIS Manager showing where WebDAV can be enabled

Adding an authoring rule

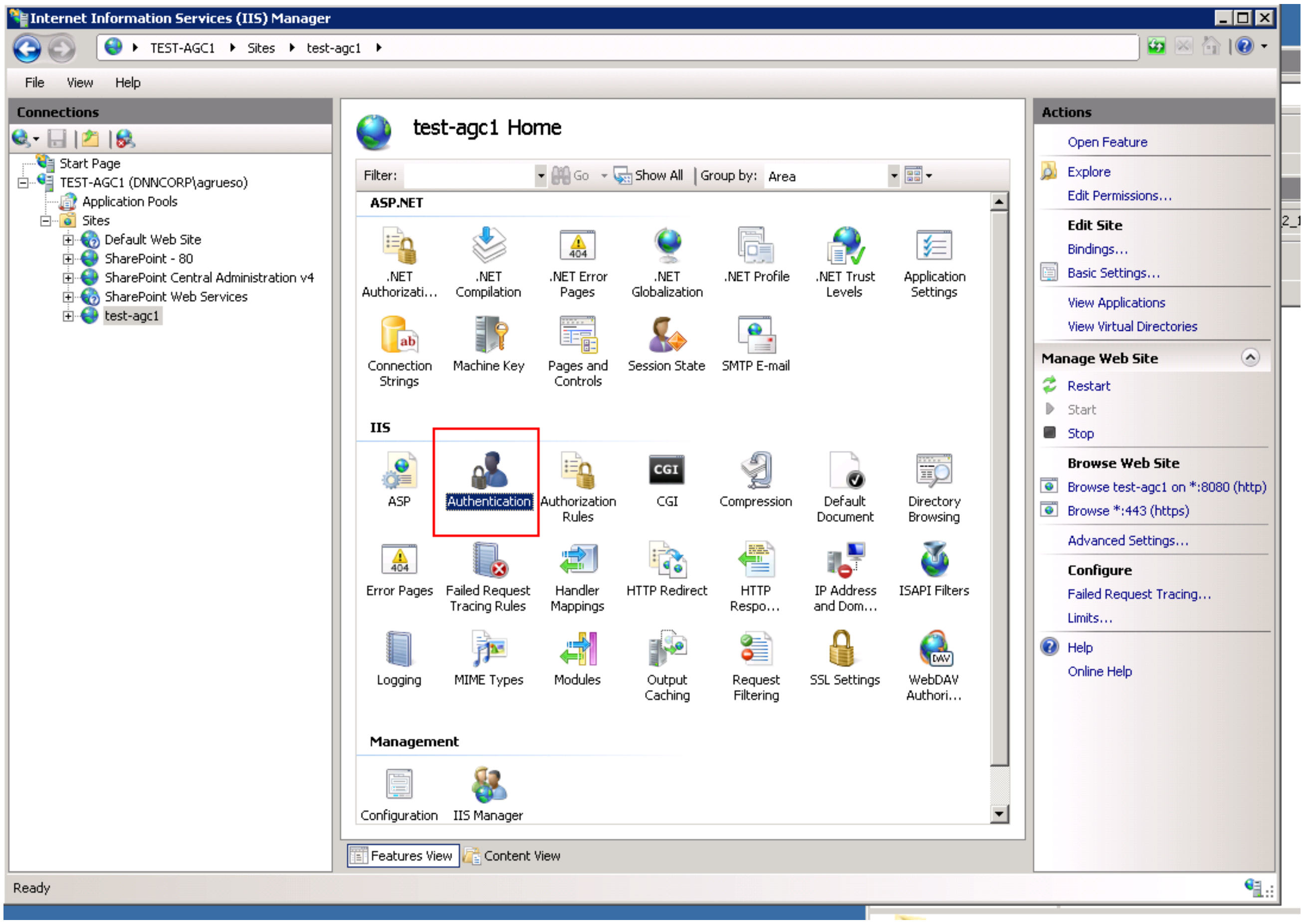
1. Click the Add Authoring Rule link to open the Edit Authoring Rule window.
2. In the **Allow Access To** section, select **Specified Content** and enter `/Portals/*`
3. In the **Allow Access to This Content To** section, select **All Users**.
4. In the **Permissions** section, mark ☑ the **Read**, **Source** and **Write** check boxes.



5. Click the **OK** button.

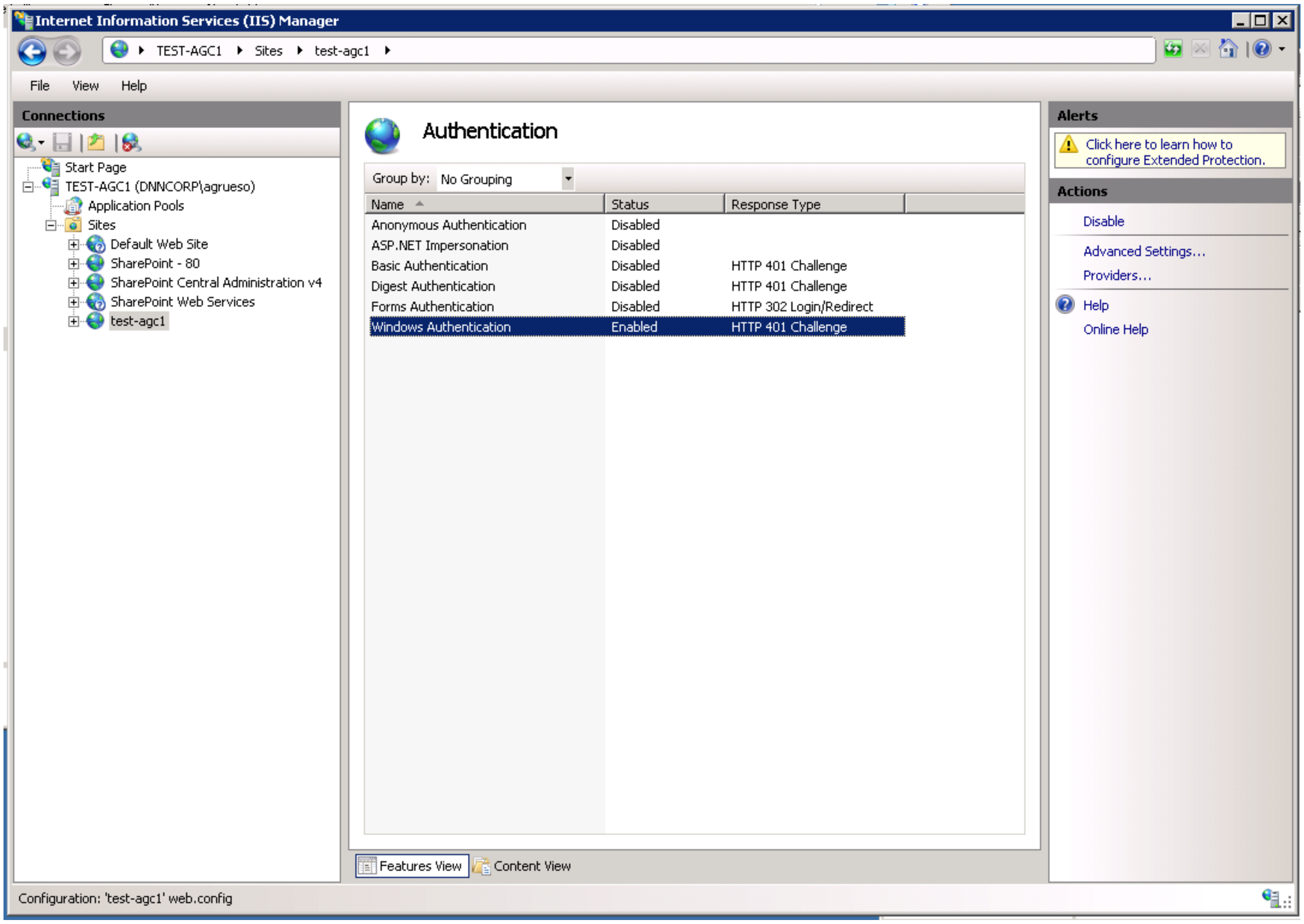
Setting Authentication Providers

1. Go to Authentication Providers from IIS site.



Authentication providers location on IIS

2. Set the Authentication providers as follows in the below image. Ensure that only Windows Authentication must be enabled.



Authentication Provider settings

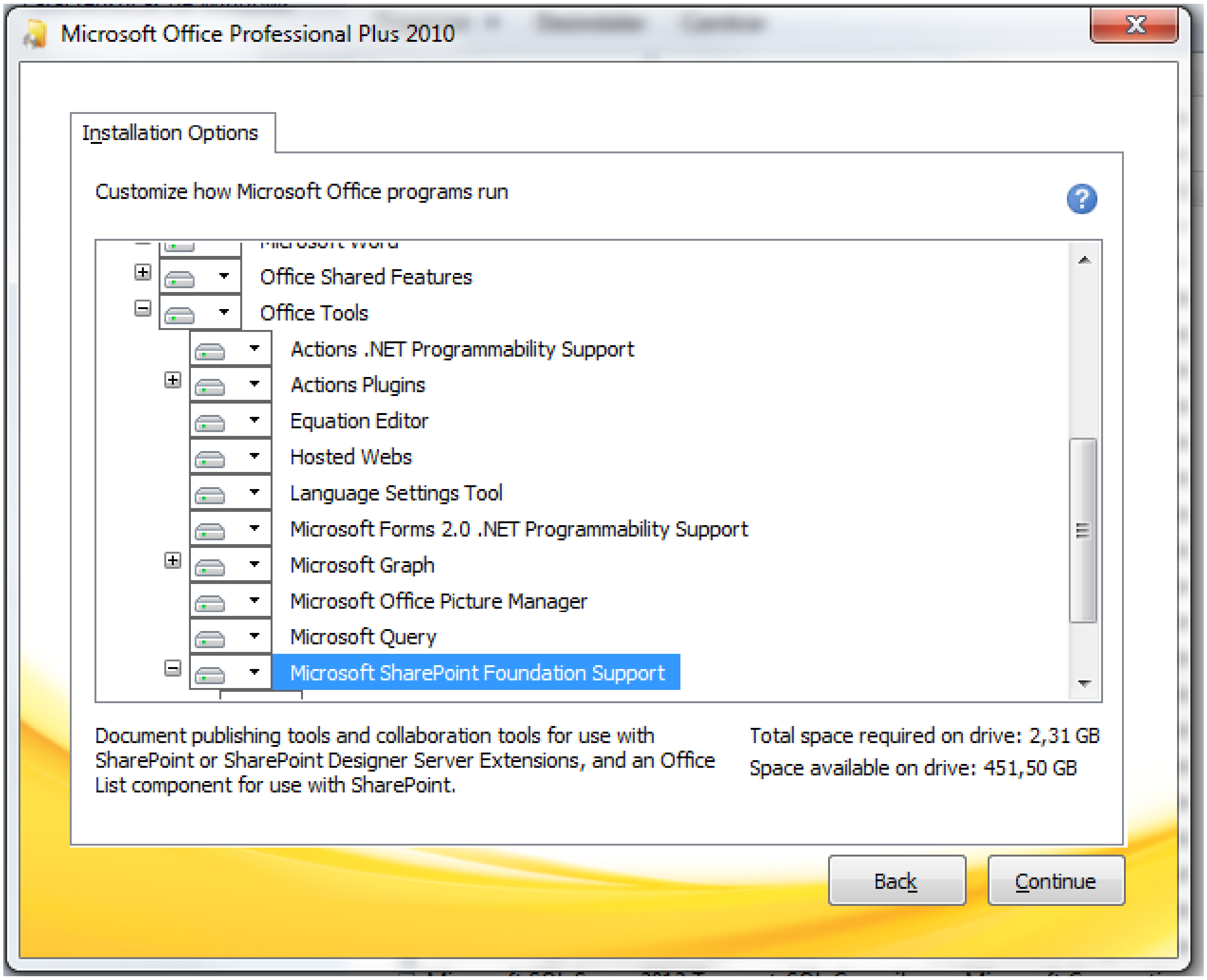
Adding the IISRESET Feature

1. Open a Command prompt as Administrator.
2. Type `iisreset` and then click the **Enter** button.

Client Components

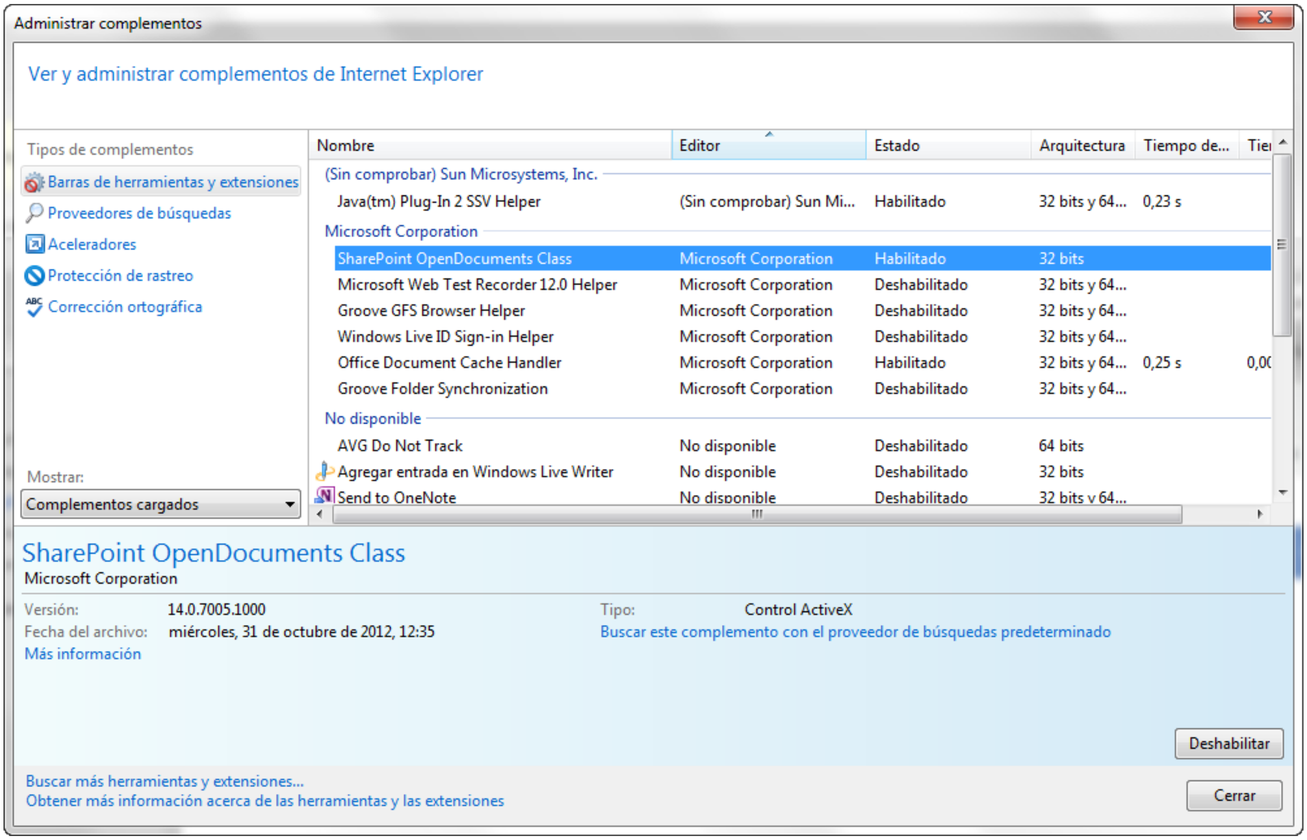
Office SharePoint support

The Microsoft SharePoint Foundation Support feature must be installed with Office Applications.



Location of the Microsoft SharePoint Foundation Support

Also ensure that SharePoint OpenDocuments Class add-in is enabled on browsers.



SharePoint OpenDocuments Class add-in enabled on IE

Clearing temporary data from your Browser

If you have logged in to website prior to configuring server settings you must clean all temporary data and cache from implicated web browsers and, after that, close them in order to ensure that web browser will not use previous authentication data.

WebDAV Settings Checklist

DNN Server Points

- Is Active Directory Authentication Provider installed?
- Is Active Directory Authentication Provider enabled.
- Is Active Directory Authentication Provider set up?
- Is Full Trust enabled?

- Are additional AD Authentication Provider commands run?
- Is the runManagedModulesForWebDavRequests:true command run?

Server Points

- Is IIS 7 or above?
- Is WebDAV IIS feature added?
- Is WebDAV enabled on IIS?
- IS WebDAV authoring rule added?
- Is Windows Authentication the only provider enabled?
- Is Anonymous Authentication disabled?
- Is iis reset command done?

Client Points

- Is MS Office 2007 or above installed?
- Is the Microsoft SharePoint Foundation Support Office feature installed?
- Is the SharePoint OpenDocuments Class Internet Explorer Ad-on enabled?
- Is the site showing the browser credentials dialog?

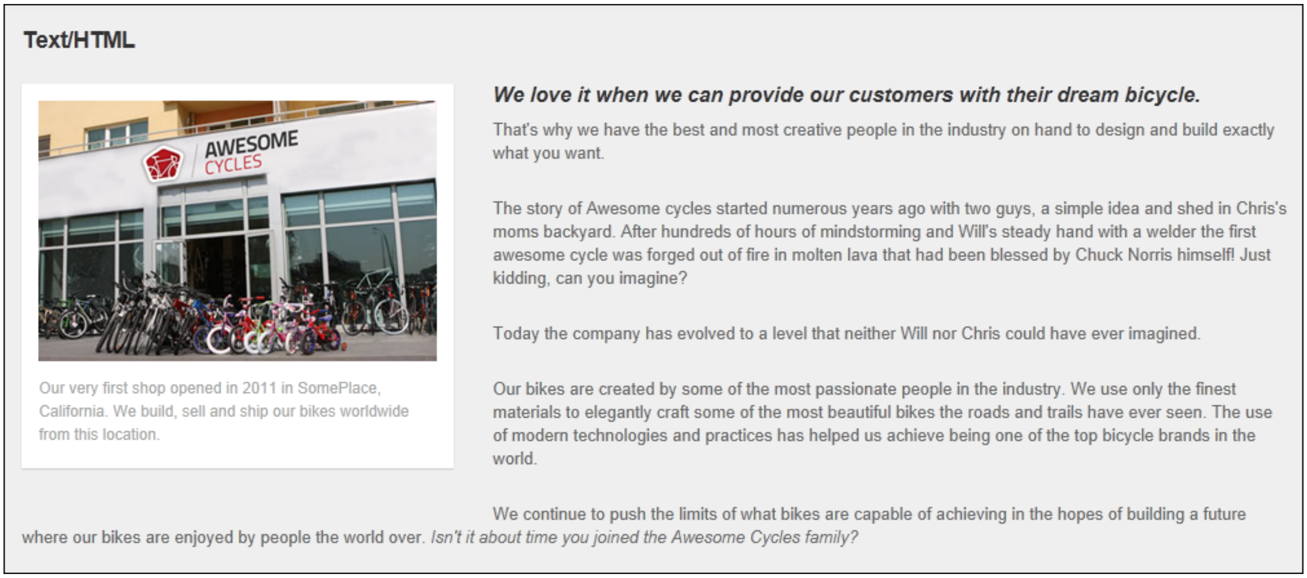
File Points

- Is a Standard Folder Mapping?
- Has the user been granted "Manage" permission on the folder?
- Is the file extension permitted on the site?

HTML Pro

About the HTML Pro Module

The HTML Pro module (typically titled Text/HTML) can display rich text, HTML, images, flash or can perform a script. This is a free form module that uses the Editor control to manage content using either a Basic Text Box or the Rich Text Editor. Note: This module is typically installed on the site. Users must have Add Content permission to the page where the HTML Pro module is located in order to manage module settings.



The HTML Pro Module

Features:

- Replacement Tokens
- IPortable, Upgradable, ISearchable
- Workflow support for both direct publishing which publishes changes to content immediately, as well as content staging which allows editors to save and view content in a staging area prior to publishing.
- Administrators to create additional and unique content staging workflows.
- Editors can preview and rollback content to earlier versions
- Administrators can set the number of previous versions to be kept.
- View a detailed history of content versions.

Configuring and Using Workflow

The HTML Pro module provides workflow support for both direct publishing and content publishing workflows that allow editors to save and view content in a staging area prior to publishing. Here is an overview of process for setting up and using workflow:

1. Choose the workflow to be used for this module. See "Setting a Workflow". The module comes with one workflow titled "Content Approval" which includes three workflow states: Draft, Ready For Review, and Published. If this workflow doesn't suit your requirements, Administrators can instead create a new workflow (See

"Adding a Workflow") and add as many states as are desired to that workflow (See "Adding a Workflow State")
2. Once the required workflow has been set, Administrators can choose how widely the workflow is used on the site. See "Configuring Admin Workflow Settings"
3. Other settings to consider updating before continuing are See "Enabling/Disabling AutoSave", See "Setting Maximum Version History" and See "Enabling/Disabling Token Replacement"
4. Now you are ready to begin adding content. See "Adding and Editing Content"
5. Module Editors can now add the first draft of the content and make as many changes and updates as they like. These updates will not be published or be viewable by site visitors. Once the editor is happy with her/his work the content can be set for publishing (Publish Changes) and Locked to prevent further changes.
6. The content now moves into the next state in the workflow. For example, for the "Content Approval" workflow, the workflow will have now moved from the "Draft" state to the "Ready For Review" state. Users who have been granted permission for the "Ready For Review" state will receive a notification message advising that the content is ready to review. The notification message can be accessed via their user account or using the My Modules module. See "Managing My Modules".
7. In this next state of workflow, these users can now choose the following actions:
    1. Approve the content. The content is then moved to the next state.
    2. Edit and Approve the content. The content is then moved to the next state.
    3. Edit and save the content without approving it. This allows users to return to the content and make further changes without moving to the next workflow state. Saving the content without approving it will move the lock to the current user however the content will remain in the current state until it is approved.

Additional Notes:

Content Approval Workflow

When the module is in Published or Draft workflow state, a user with edit permission can edit the content and lock or publish the content after clicking save. The outcomes are

- If the content is not published, the new state is *draft*
- When the content is published, it is locked to the user by default and the new state is *Ready for Review*

When the module is in Ready for Review workflow state, a user with permission to approve the content can edit the content, and approve or reject the content after clicking save

- If the content is only edited, then the lock is transferred to the approver user
- If the content is rejected, the new state is *Draft* and the lock remains with the original user
- If the content is approved, the new state is *Published* and the content is unlocked
- If the user is an Administrator, they can choose to lock, approve or reject the content.

Save Draft Workflow (e.g. more than one state between draft and published)

When the module is in Published or Draft workflow state, a user with edit permission can edit the content and lock or publish the content after clicking save.

- If the content is not published, the new state is *Draft*. The content can also be locked if desired.
- When the content is published, its new state is *Published*.
- If the user is an Administrator, the content can be unlocked.

Module Editors

Adding and Editing Content

How to add content to the HTML Pro module. Add basic text, rich text or paste in HTML using the Editor.

Prerequisite. If a workflow other than direct publishing is required, the required workflow must be activated on the site (See "Activating/Deactivating a Workflow") and set for this module, See "Setting a Workflow".

1. Select **Edit Content** from the module actions menu - OR - Place your mouse over the content and click the **Edit** button that is exposed in the top right corner of the content.
2. **Optional.** In the **Summary** section, enter a summary for mobile devices. See "Displaying/Hiding Summary" for more details.
3. Enter your content using one of these methods.
4. **Optional.** Click the **Preview** tab below the Editor to view the content currently displayed in the Editor - OR - Select the Content Preview tab above the Editor. If Direct Publish (rather than Save Draft) is used for this module, then skip to Step 7.
5. At **On Save?** / **Publish Changes?**, select from the below options (Note: This field only displays when Save Draft is enabled. See "Setting a Workflow"):
    - Mark the check box to publish these changes and set them as ready for approval. This automatically locks the content until it is either published or the lock is manually removed by an Administrator.

- Unmark the check box if the content is not yet ready for publishing/approval. This enables you to save this draft and return to edit it at a later stage before submitting the content for approval.
    1. Mark the check box at **Lock Content?** to lock this content from further changes until you the changes are published - OR - Unmark the check box to allow additional changes to this draft prior to publishing.

6. Click the **Save** button. If Direct Publishing is set for this module, the content changes are now displayed in the HTML Pro module. If Content Approval is enabled, continue this tutorial.
7. Enter a useful comment regarding this update (if prompted). Note "Save Draft" does not ask for a comment. The "Content Approval" asks for comment twice, once while publishing and once while approving/rejecting.
8. Click the **Add Comment** button. This enters these changes into the next stage of content approval and sends out notification messages as set in the workflow. You will be notified when your changes are approved or rejected.

Next Steps (You can now perform one of the following tasks):

- If content approval is enabled and this content is now ready to publish, See "Publishing a Draft"
- If the content requires further editing, repeat this tutorial.
- If the lock status of the content requires changing, See "Locking/Unlocking Module Content"

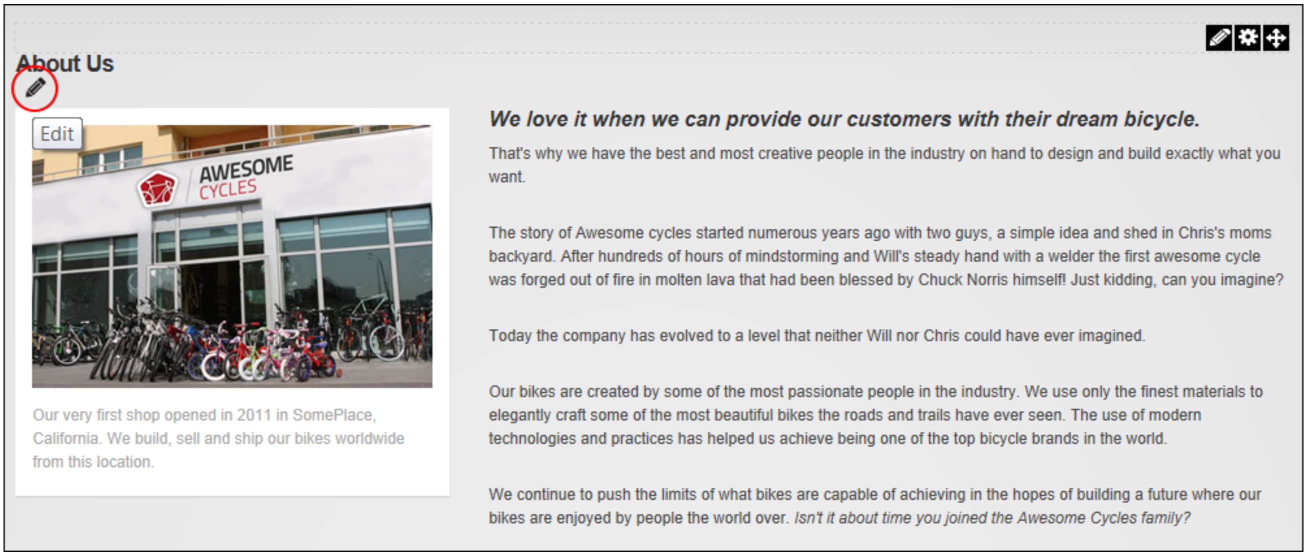
Related Topics:

- See "Managing AutoSaved Content"

Adding and Editing Content Inline

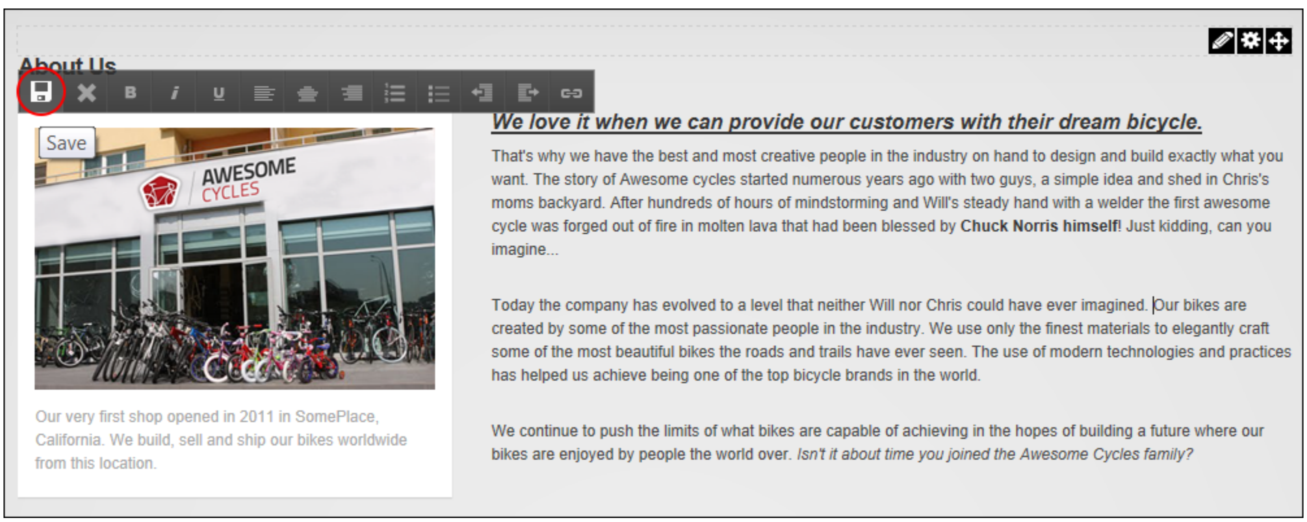
How to perform inline content editing including basic font and paragraph tools and link insertion using the HTML module. Note: If this setting has been disabled, content can instead be edited via the module action menu.

1. Place your mouse over the content to expose the **Edit** button in the top right corner of the content.



2. Click the **Edit** button to enable content editing and then edit the content as required.

3. Click the **Save** button to save your changes. Content edits are only saved when you press this button. - OR - Click the **Cancel** button to cancel your changes.

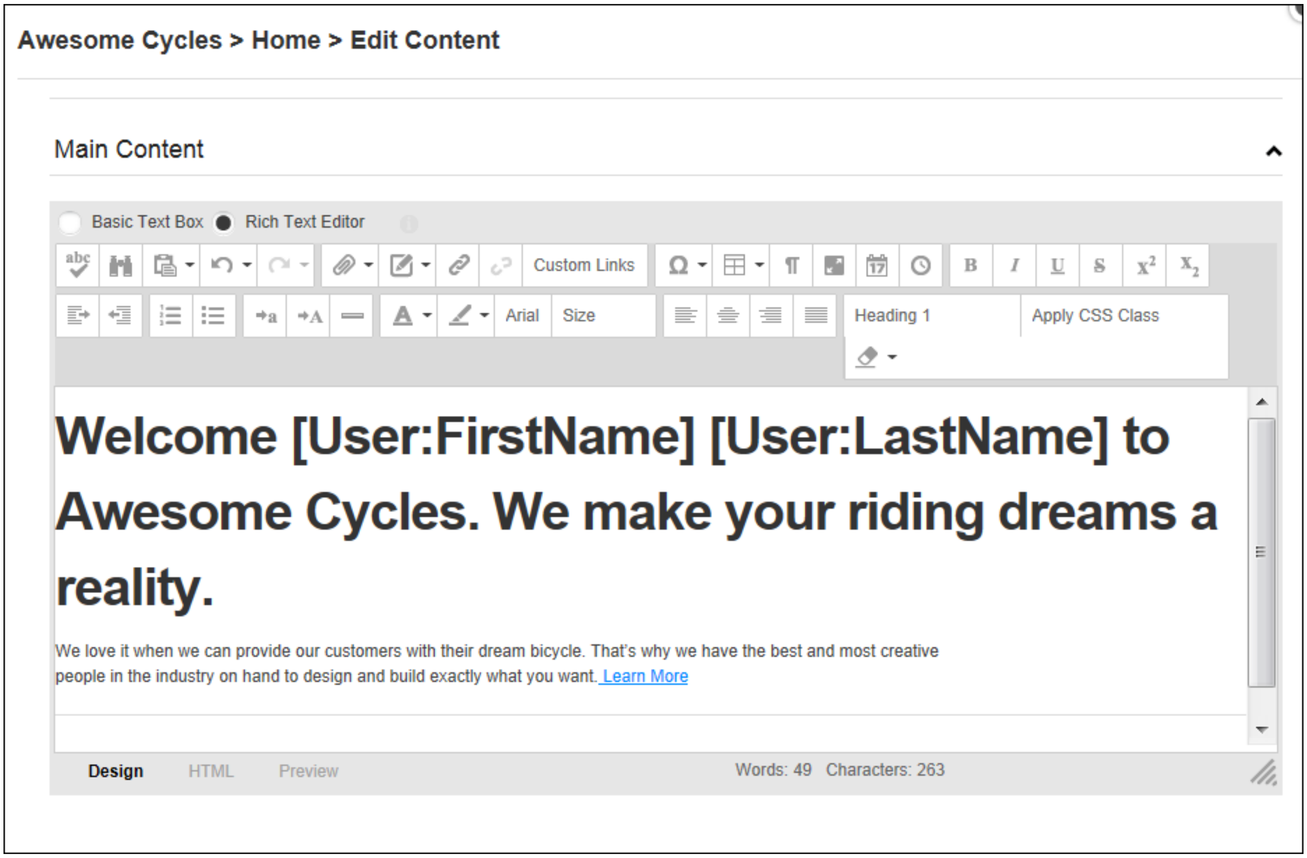


Adding Replacement Tokens

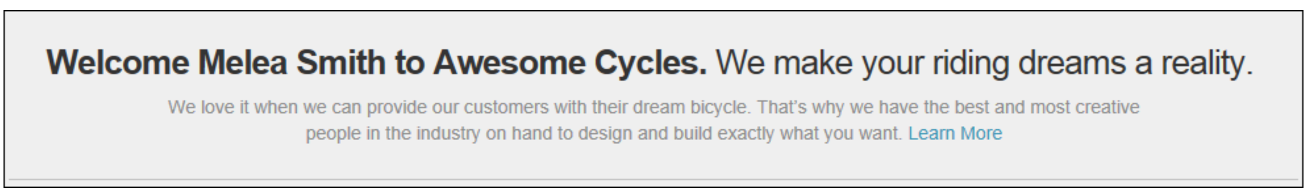
How to add replacement tokens into the HTML Pro module.

Prerequisite. See "Enabling/Disabling Token Replacement"

1. Select Edit Content from the module actions menu.
2. Enter the replacement token into the Rich Text Editor. E.g. [User:FirstName] [User:LastName].



3. If Workflow is enabled, choose the required state. See "Adding and Editing Content" for more details on advancing this content through the workflow process.
4. Click the **Save** button.



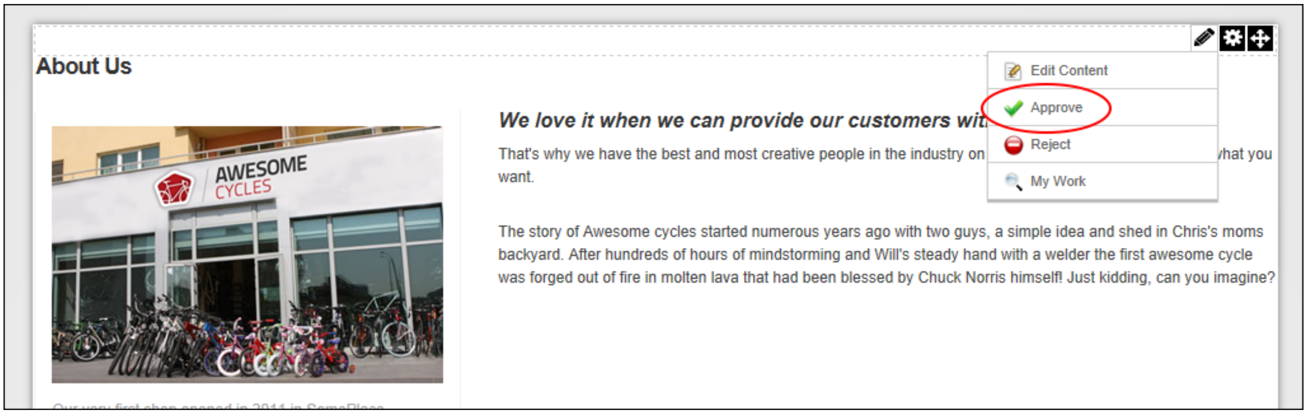
Replacement Tokens Displaying the User's Name

Approving Content

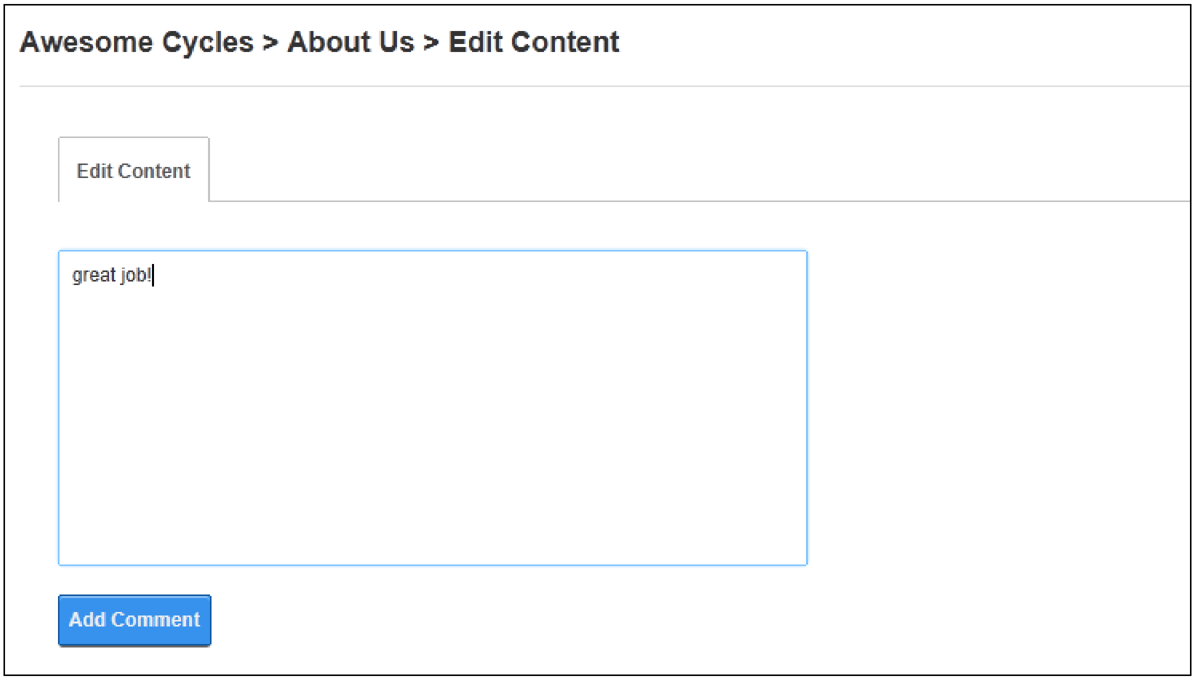
How to approve unpublished content using the HTML Pro module. This tutorial applies to the Content Approval workflow and other workflows with more than two states. A "Content Submission Notification" message is sent whenever content is ready to be reviewed.

Approving without editing

1. Click on the page link in the notification message. A border will be displayed around the section of content that requires approval.
2. Select ✔ **Approve** from the HTML Pro module actions menu. This displays the approval comment text box.



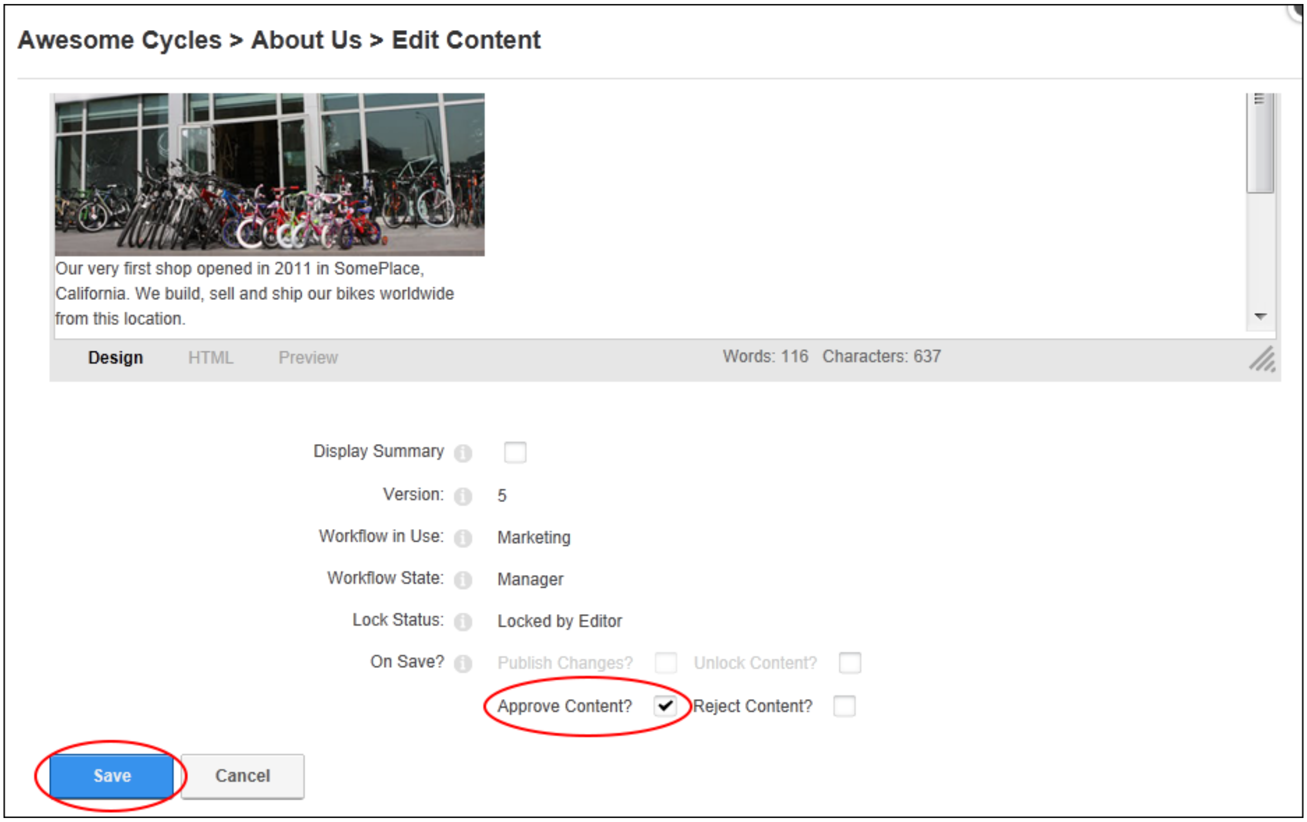
3. Enter a comment into the Edit Content text box. This comment is included in the notification message sent to the author. Note: Entering a comment is mandatory for publishing or rejecting content.
4. Click the **Add Comment** button to approve this content and send an approval message to the author.



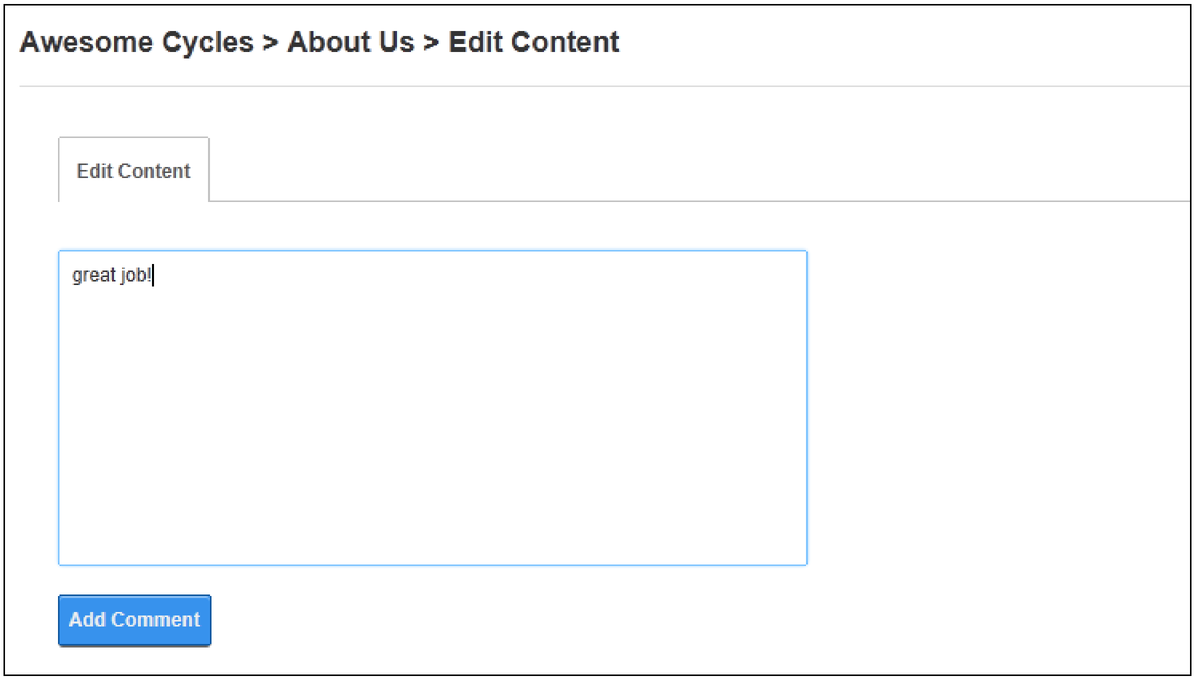
Approving HTML Pro Module Content

Editing and approving

1. Click on the page link in the notification message. A border will be displayed around the section of content that requires approval.
2. Select **Edit Content** from the module actions menu.
3. Edit the content as required.
4. At **On Save?**, mark the check box at **Approve Content?** to approve and publish this content. Note: This field only displays when Save Draft is enabled. See "Setting a Workflow"
5. Click the **Save** button.



6. **Optional.** Enter a comment into the Edit Content text box. This comment is included in the notification message sent to the author.
7. Click the **Add Comment** link to approve this content and send an approval message to the author.

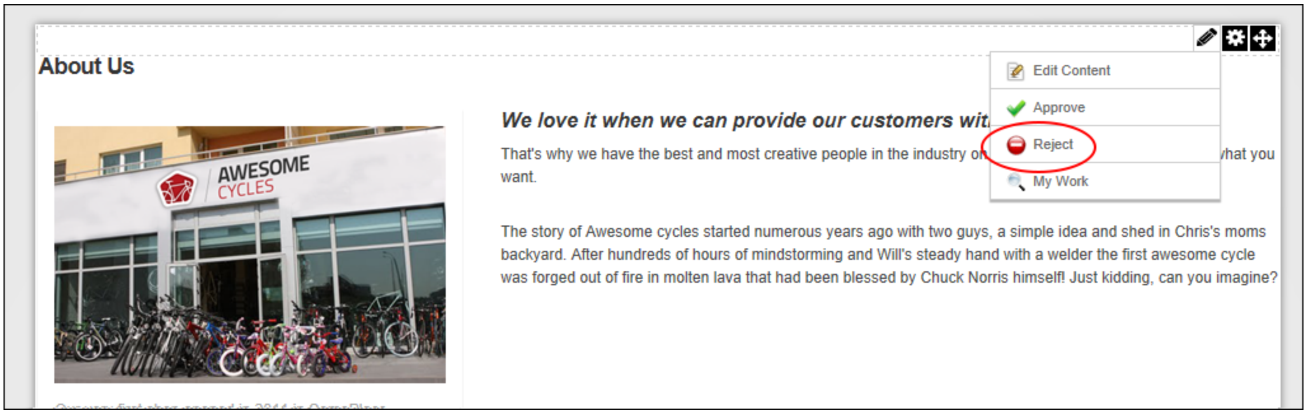


Rejecting Content

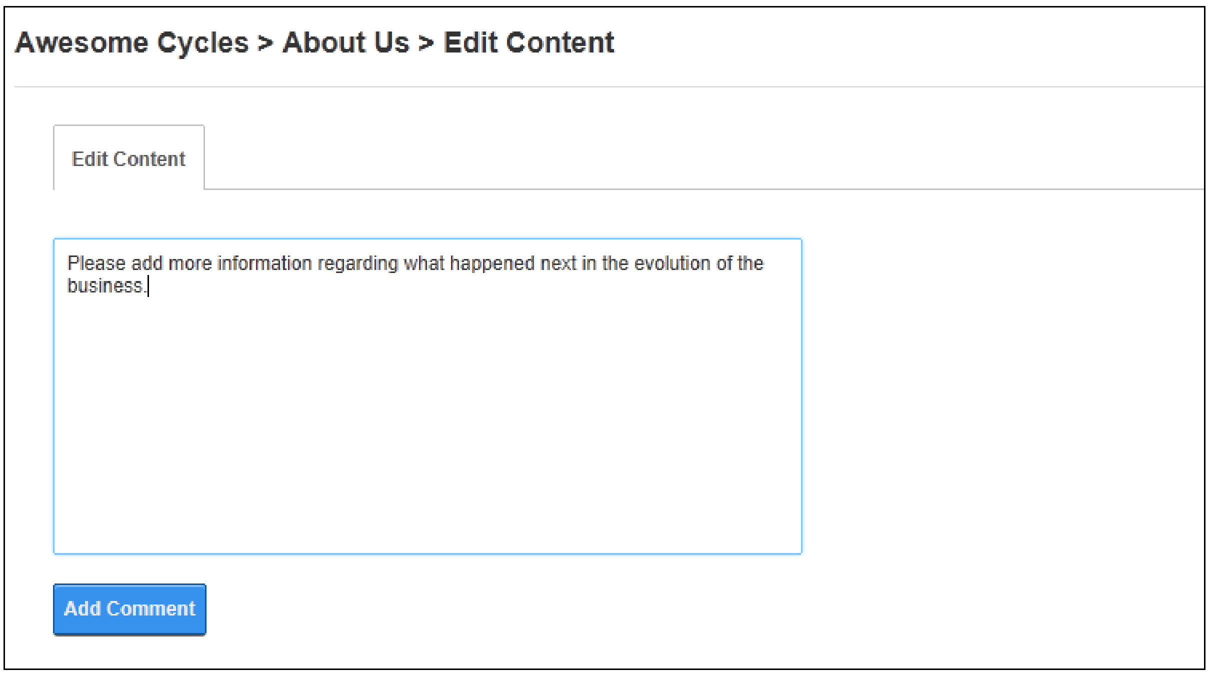
How to reject unpublished content using the HTML Pro module. This tutorial applies to the Content Approval workflow and other workflows with more than two states. A "Content Submission Notification" message is sent whenever content is ready to be reviewed.

Option One

1. Click on the page link in the notification message. A border will be displayed around the section of content that requires approval.
2. Select **Reject** from the HTML Pro module actions menu.



3. Enter a comment explaining why the content is being rejected into the Edit Content text box. This comment is included in the notification message sent to the editor who made the rejected changes.
4. Click the Add Comment link to reject this content and send the explanatory message to the author.

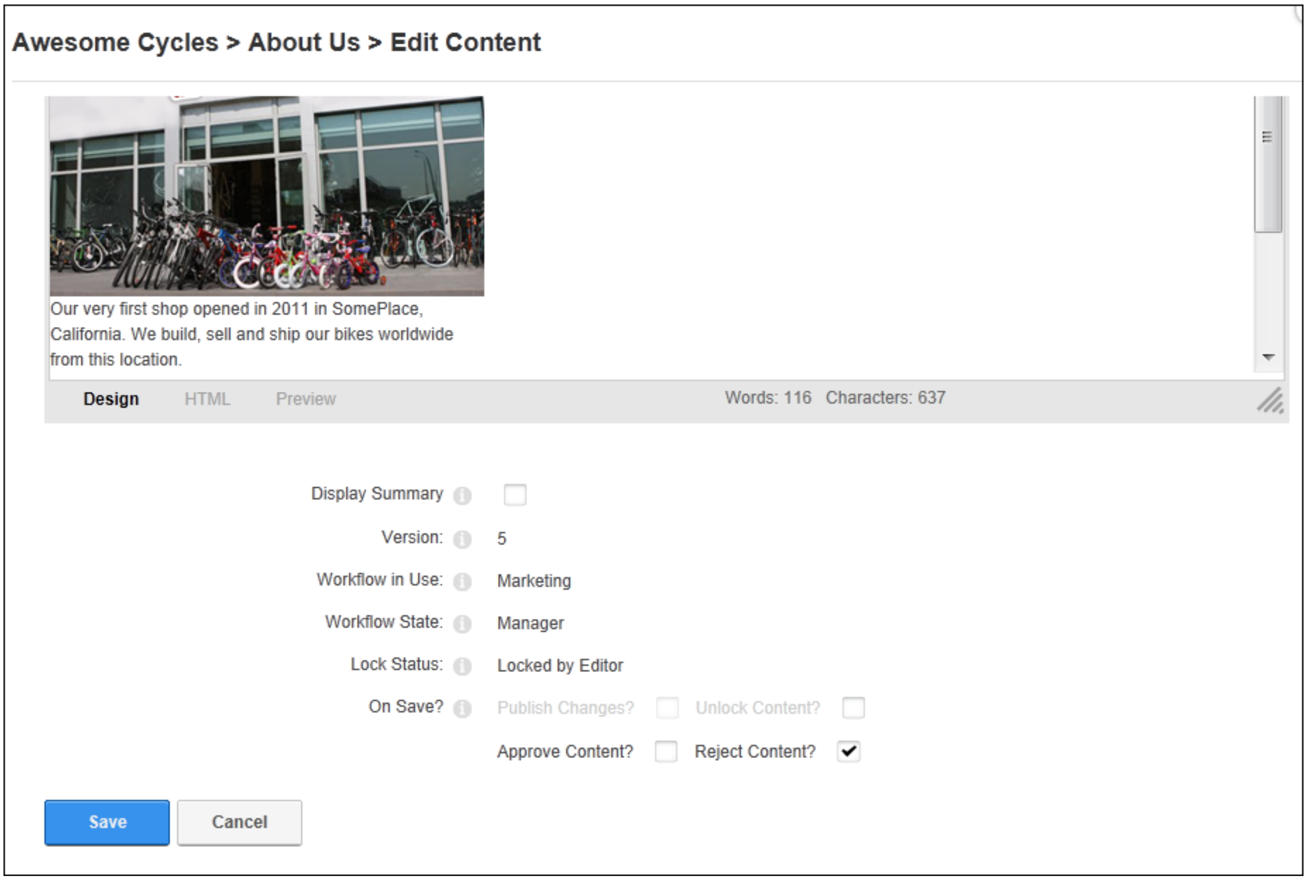


Rejecting HTML Pro Module Content

Option Two

1. Click on the page link in the notification message. A border will be displayed around the section of content that requires approval.
2. Select **Edit Content** from the module actions menu.

3. At **On Save?**, mark the check box at **Reject Content?** to reject this content.
4. Enter a comment explaining why the content is being rejected into the Edit Content text box. This comment is included in the notification message sent to the editor who made the rejected changes.
5. Click the Add Comment link to reject this content and send the explanatory message to the author.

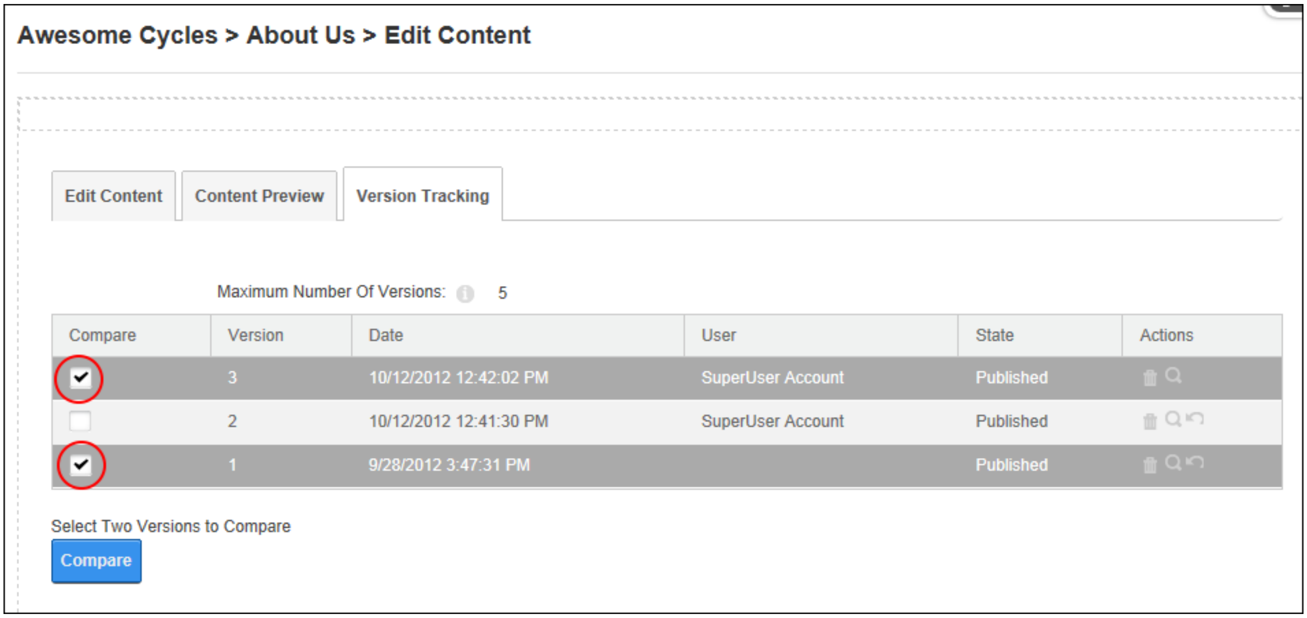


Rejecting HTML Pro Module Content

Comparing and Managing Versions

How to compare any two versions of the content using the HTML Pro module. For example, an old version can be compared to a new version, or a new version can be compared to an old version.

1. Select **Edit Content** from module actions menu.
2. Select the **Version Tracking** tab.
3. In the Compare column, mark the check box beside the two versions to be compared.

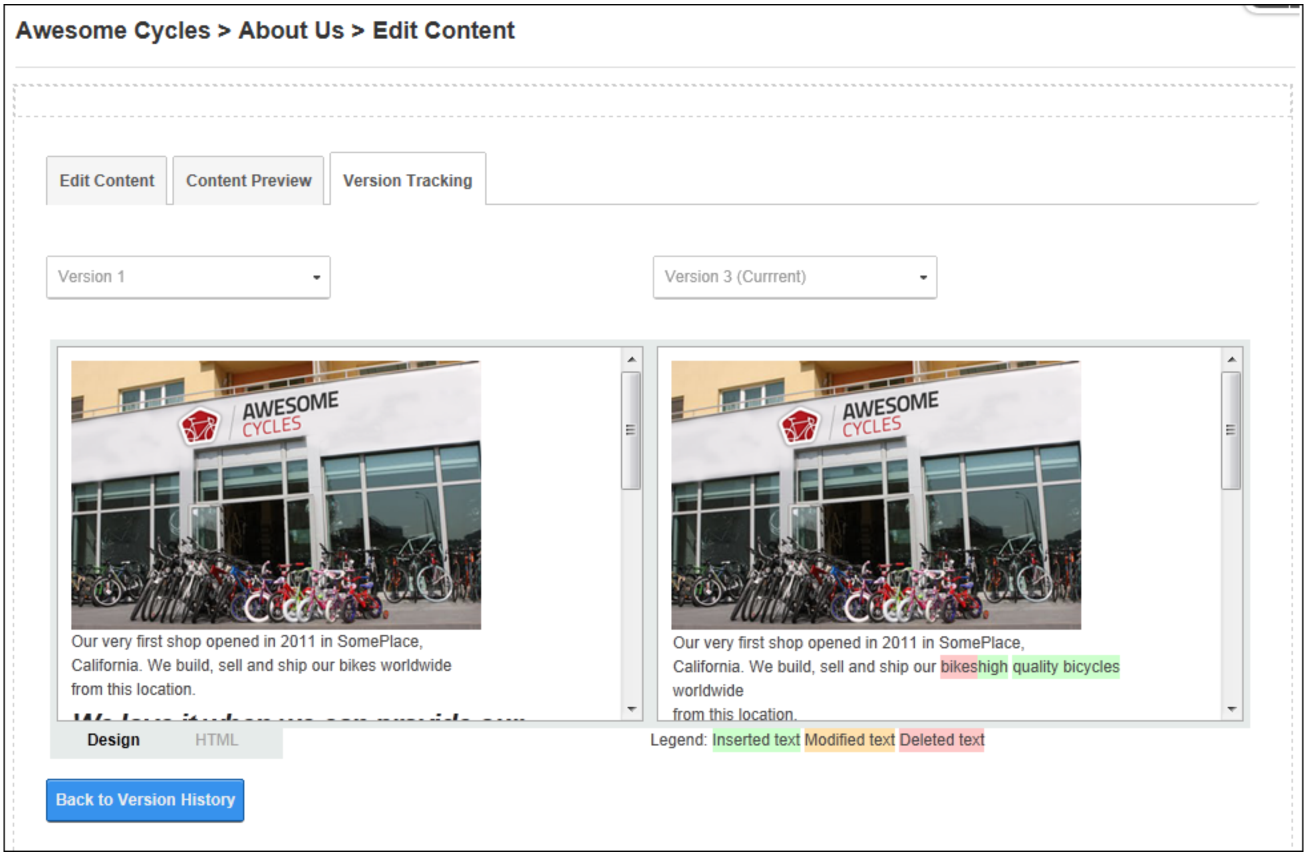


4. Click the **Compare** button. The selected versions are now displayed. The panel on the left shows the original document and the panel on the right shows the differences: Changes between each version are indicated as follows on the latest version:
   - New text is highlighted in green
   - Deleted text is highlighted in red
   - Modified text is highlighted in yellow. For example, if the text is the same, but there are changes in the formatting

Tip: You can change the versions being compared using the two drop down boxes located above the content viewing windows.

Note 1: When performing version comparison, it can be done in Text mode or HTML mode (as shown in the image below – Design/HTML in gray background). In Text mode, only text is compared; In html mode, html code is compared. HTML mode is useful for users with HTML knowledge.

Note 2: A version of the document not only has "main content text" but it also has "summary text". When you enable "Display Summary" in settings, you see four windows when comparing versions – two for comparing summaries and two for comparing main content. Below, you only see main content being compared.



The user can now click on the Back to Version History link and perform one of the following tasks:

- See "Rolling Back Content"
- See "Publishing a Draft"
- See "Approving Content" or See "Rejecting Content"
- See "Deleting a Content Version" (Administrators only)

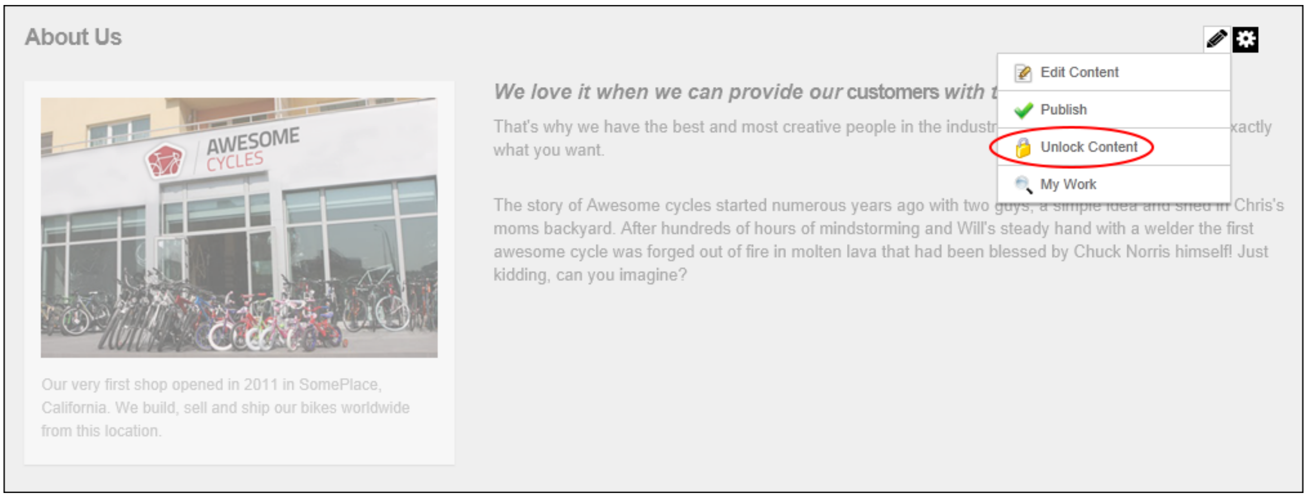
Locking/Unlocking Module Content

How to lock or unlock the content within the HTML Pro module. Locking the content prevents further changes to the current content until either the changes are published or the module is manually unlocked. Unlocking the content enables the currently published content to be edited and published.

Note: The module is automatically locked when submitting for approval and automatically unlocked on publish.

Option One

1. Select **Lock Content** or **Unlock Content** from the module actions menu.



Unlocking Module Content

Option Two

Module content can also be locked or unlocked when adding or editing content.

Option Three

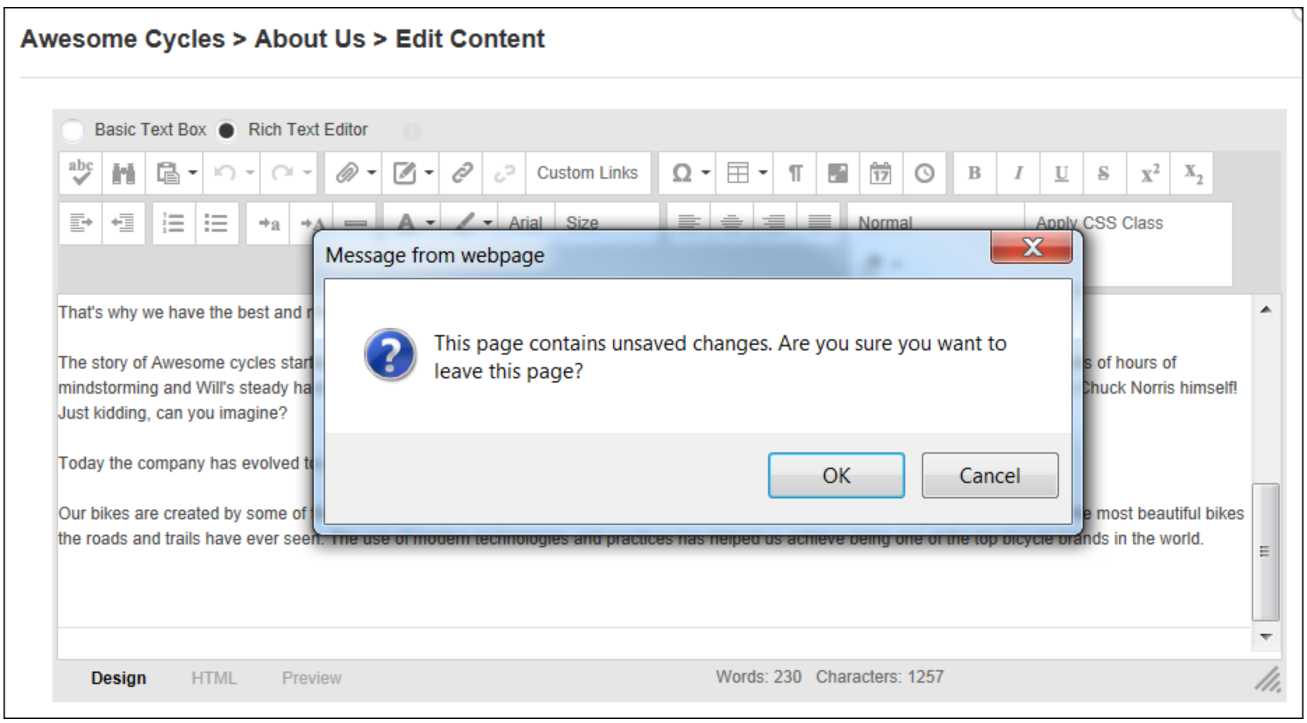
The My Modules module allows authorized users to Lock/Unlock HTML Pro modules as well as publish/approve/reject content from the My Modules module for one or multiple modules in one click, bypassing the need to enter a comment. The My Modules module lists all your modules and helps you finish your editing/approving/rejecting work much faster as you can see all “locked” modules together or listing modules of a certain type

To unlock and manage multiple modules, See "Managing My Modules"

Managing AutoSaved Content

The HTML Pro module includes an AutoSave feature that ensures content that is entered into the Editor but has not yet been updated will be saved to a temporary location until the Save button is clicked. This means that the content within the Editor will be available for saving regardless of external events such as lost Internet connections or user error. When a user edits content of a module with AutoSave enabled, the page will automatically save to a temporary location the inline content. AutoSave is disabled by default.

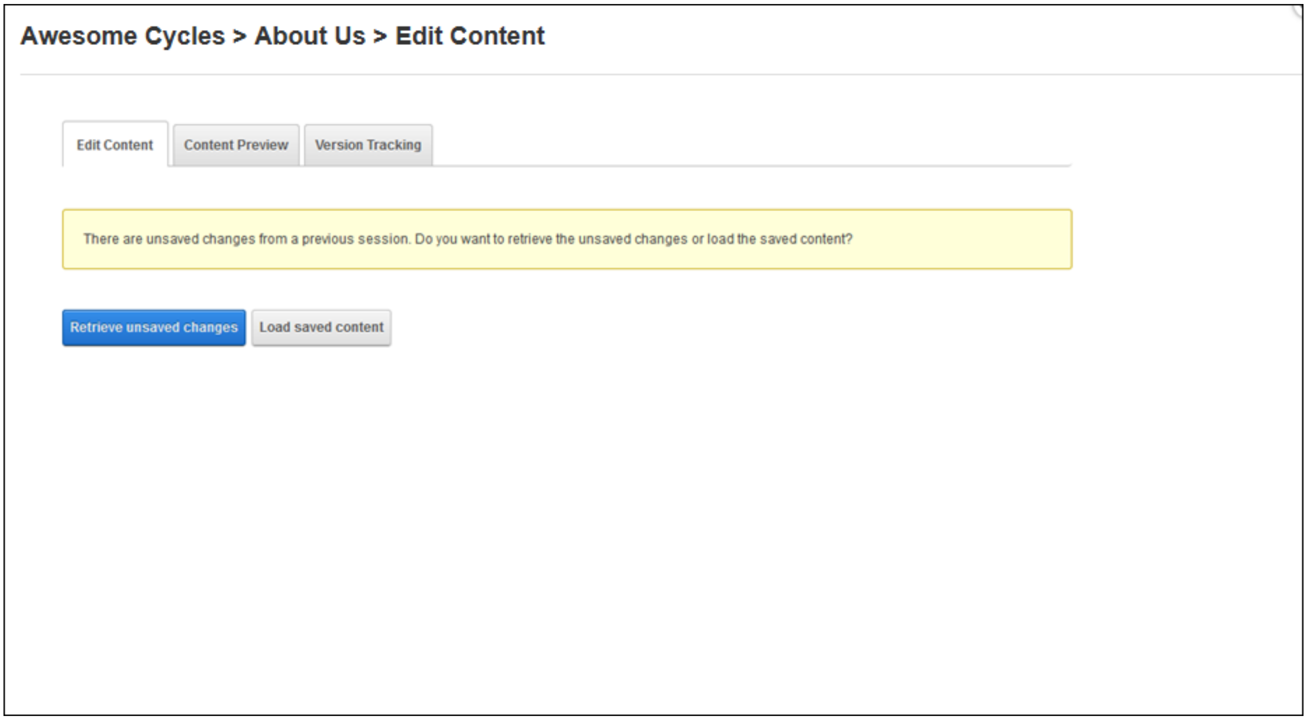
If a user closes the editor or cancels editing without saving their latest changes, a message reading "This page contains unsaved changes. Are you sure you want to leave this page?" is displayed. The user can then choose to leave the page anyway by clicking **OK**, which will discard the AutoSave changes, or click **Cancel** and return to the Editor and save the changes.



Alternatively, if an unexpected event occurs and there is content that has been AutoSaved but not updated, the following options are available to the user when they return to the Edit Content page of the module:

- **Retrieve unsaved Changes**: This recovers the last AutoSaved content of the module and replaces the current content with the recovered content.

- **Load Saved Content**: This displays the current content that has been saved and discards the AutoSaved content that is no longer required.



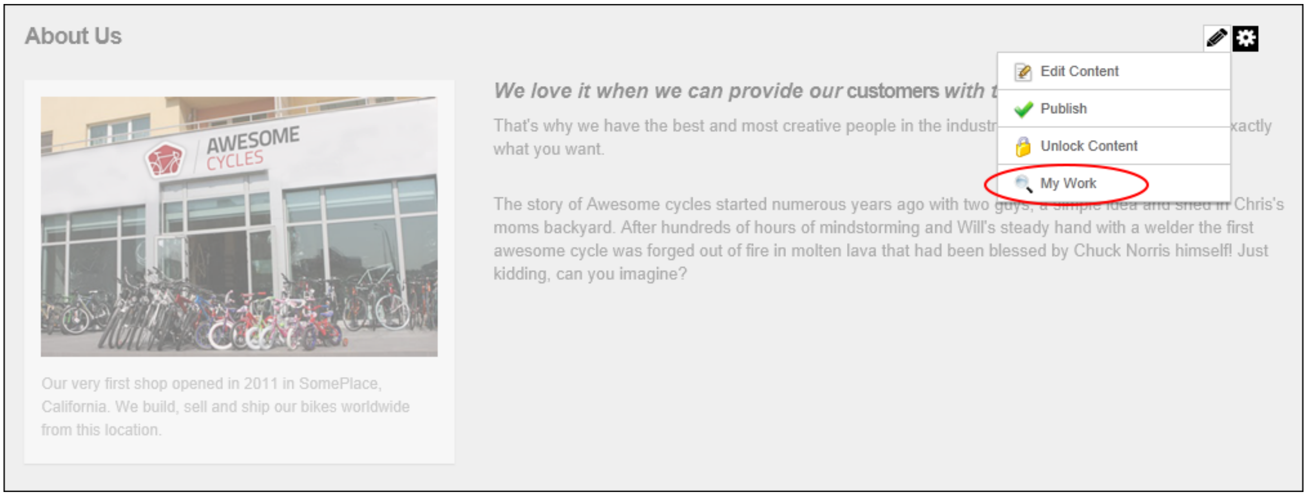
Related Topics:

- See "Enabling/Disabling AutoSave"

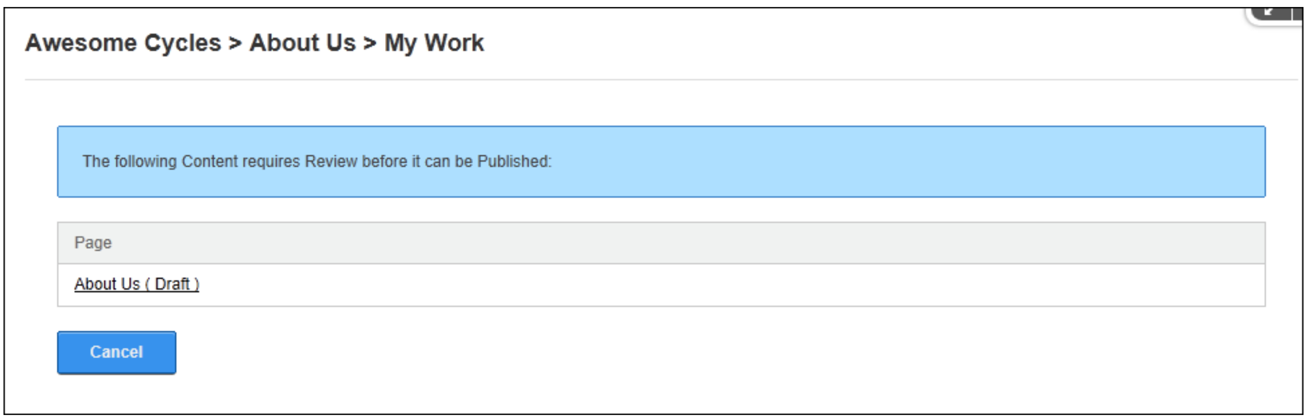
Managing My Workflow Tasks

How to view and update content that required reviewing before it can be published using the HTML Pro module. This task requires that Workflow is NOT set to direct publish. See "Setting a Workflow"

1. Select **My Work** from the HTML Pro module actions menu.



2. This displays the My Work page and a list of the content to be reviewed and published.



3. Click on one of the listed [Page Name] links to go to the page where the selected module is located.
4. You can now choose to edit, preview and/or publish (See "Publishing a Draft") the unpublished content. Alternatively, you can rollback to a previous version. See "Rolling Back Content"

Previewing Editor Content

How to preview the current content in the Editor using the HTML Pro module. This allows you to preview the content before updating it and/or publishing it.

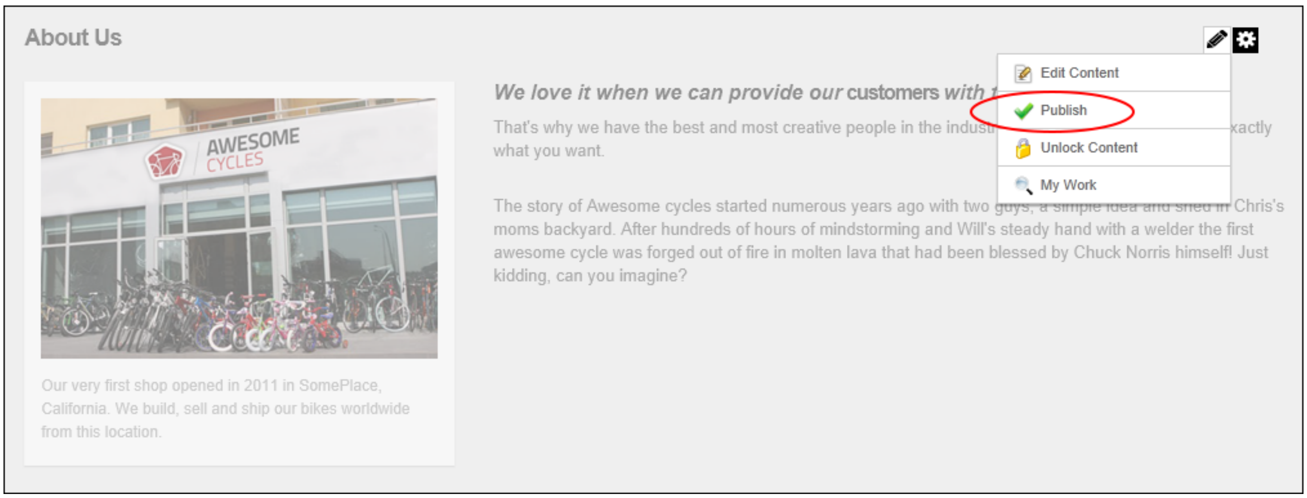
1. Select **Edit Content** from the module actions menu.

2. **Optional.** Select the Content Preview tab above the Editor. Note: The state of the version being previewed is displayed above the content. For Example, if the content hasn't yet been saved, the drop down list above will read " - Unsaved editor content - ".
3. You can now return to editing the content, or save/cancel this content.

Publishing a Draft

How to publish a draft of content using the HTML Pro module. Note: This tutorial only applies to the Save Draft and Content Approval workflows and custom workflows with multiple states.

1. Go to the required HTML Pro module.
2. Select ✔ **Publish** from the HTML Pro module actions menu.



3. In the **Edit Content** text box, enter a comment. Note: This applied only to Content Approval workflow, not for the Save Draft workflow as the comment provides communication between the published and the approver and the Save Draft workflow does not need approval.
4. Click the Add Comment link.

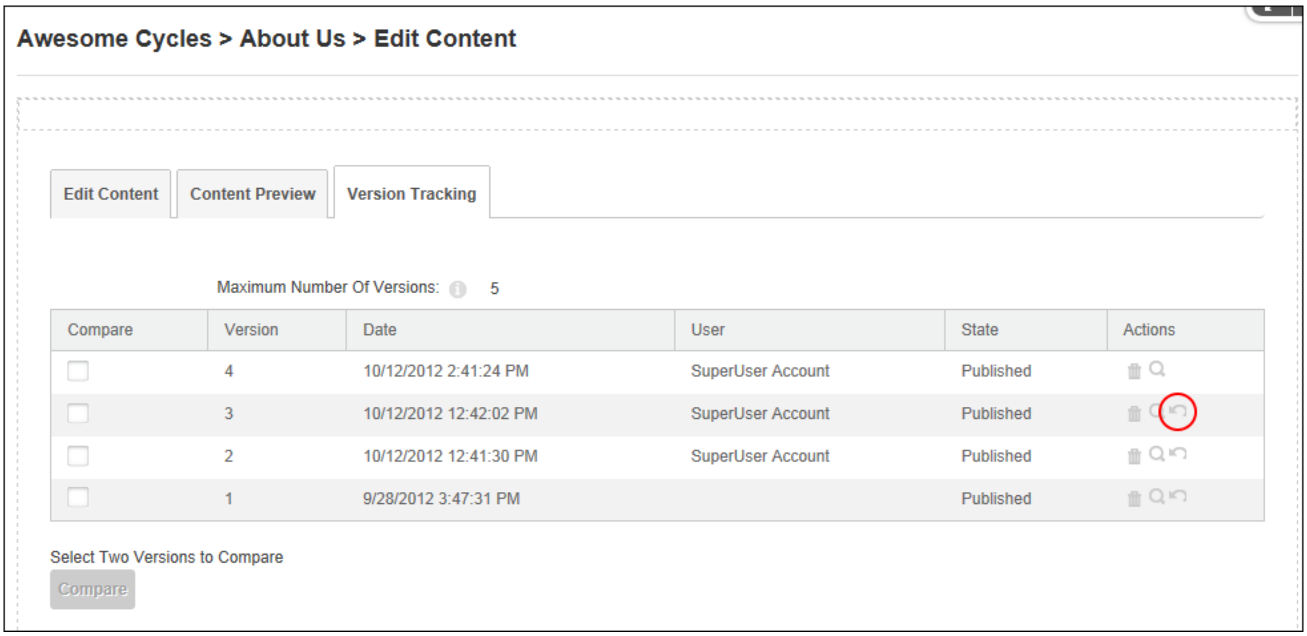
Next Step (select from these options):

- See "Approving Content"
- See "Rejecting Content"

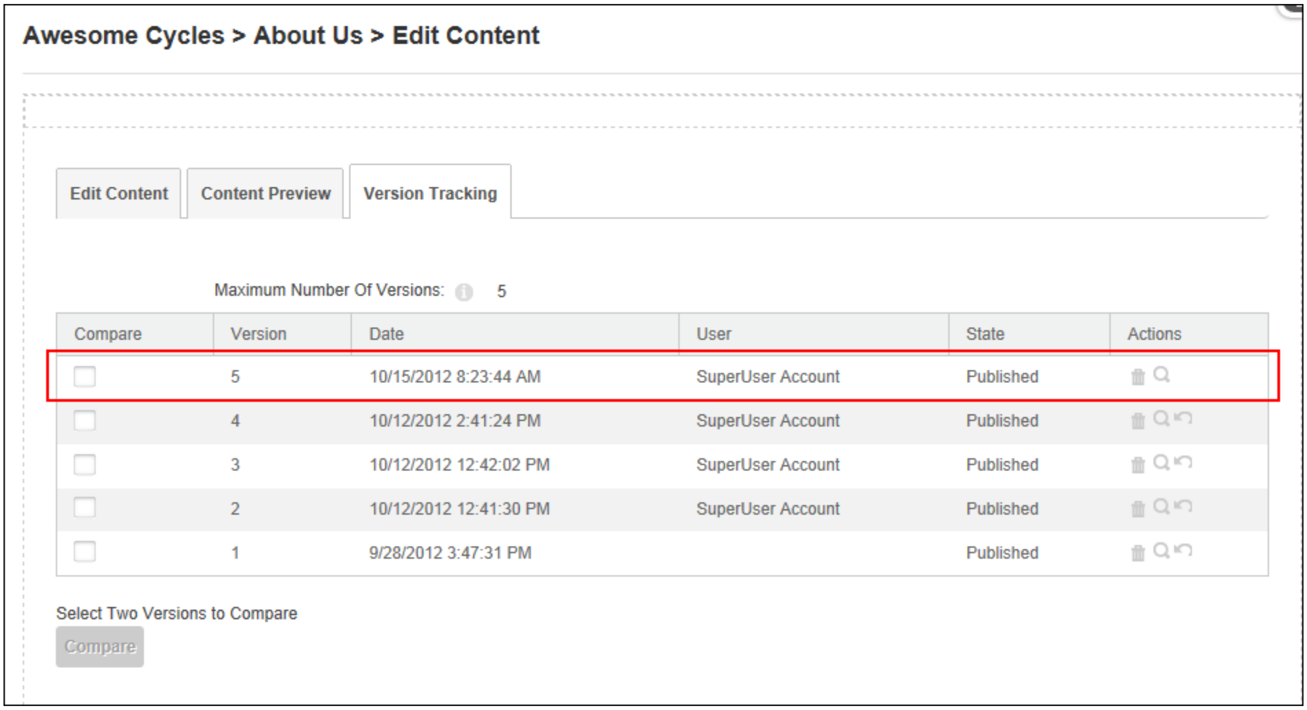
Rolling Back Content

How to rollback to a previous content version using the HTML Pro module.

1. Select **Edit Content** from the module actions menu.
2. Select the **Version Tracking** tab.
3. Locate the required version.
4. **Optional.** Click the **Preview** button to preview a version. This expands the Preview section and displays the selected version including details on the related workflow and the Item History. Once you have viewed a version, click the Version Tracking tab to return to the main view.
5. Click the **Rollback** button beside the version you want to rollback to.



6. A message box is now displayed asking "Are you sure you want to rollback to version [chosenrollbackversionnumber]? The current version is [latestpublishedversionnumber]."
7. Click the **OK** button to confirm.
8. This version will be published immediately and the content of the version will now be displayed on the Content Preview tab. The rollback will be treated as a new version and an additional version record will be added to the Version Tracking tab.

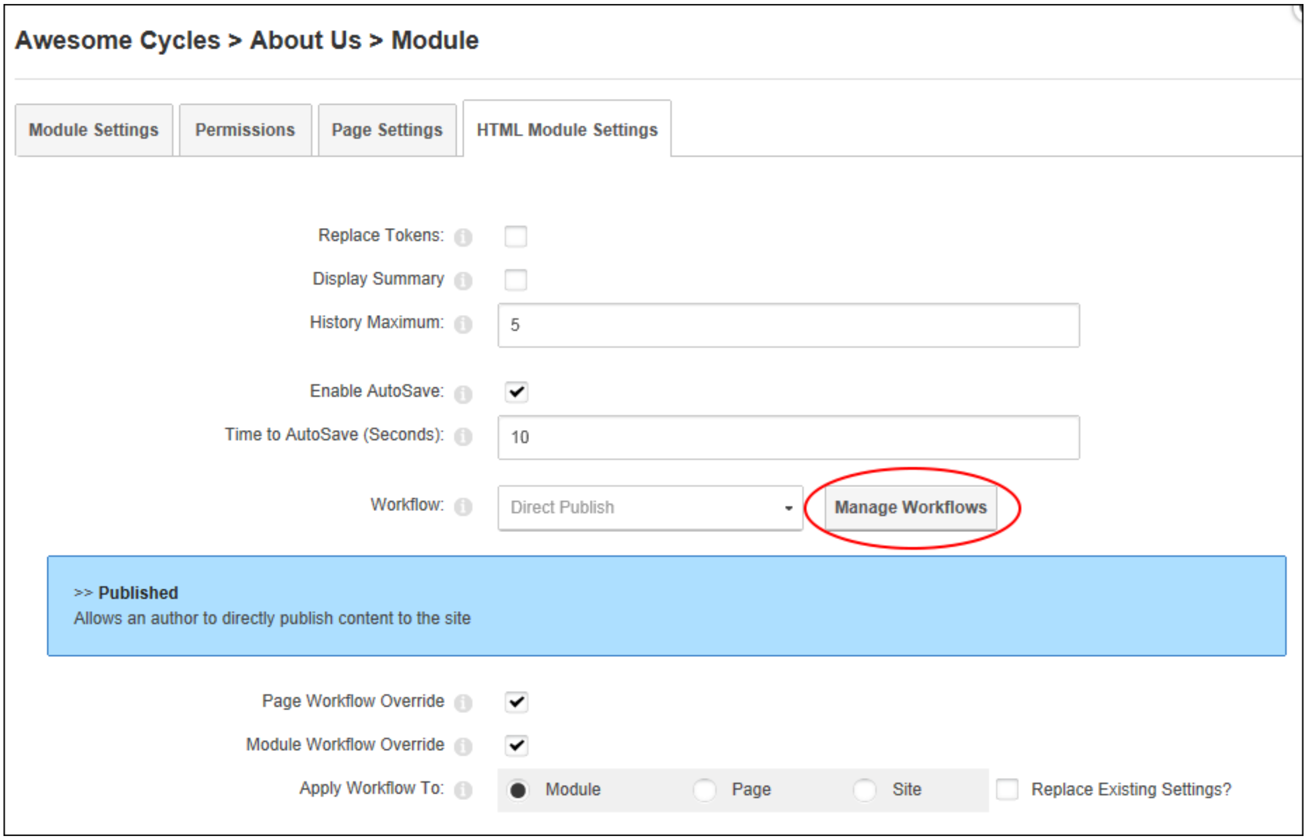


Administrators

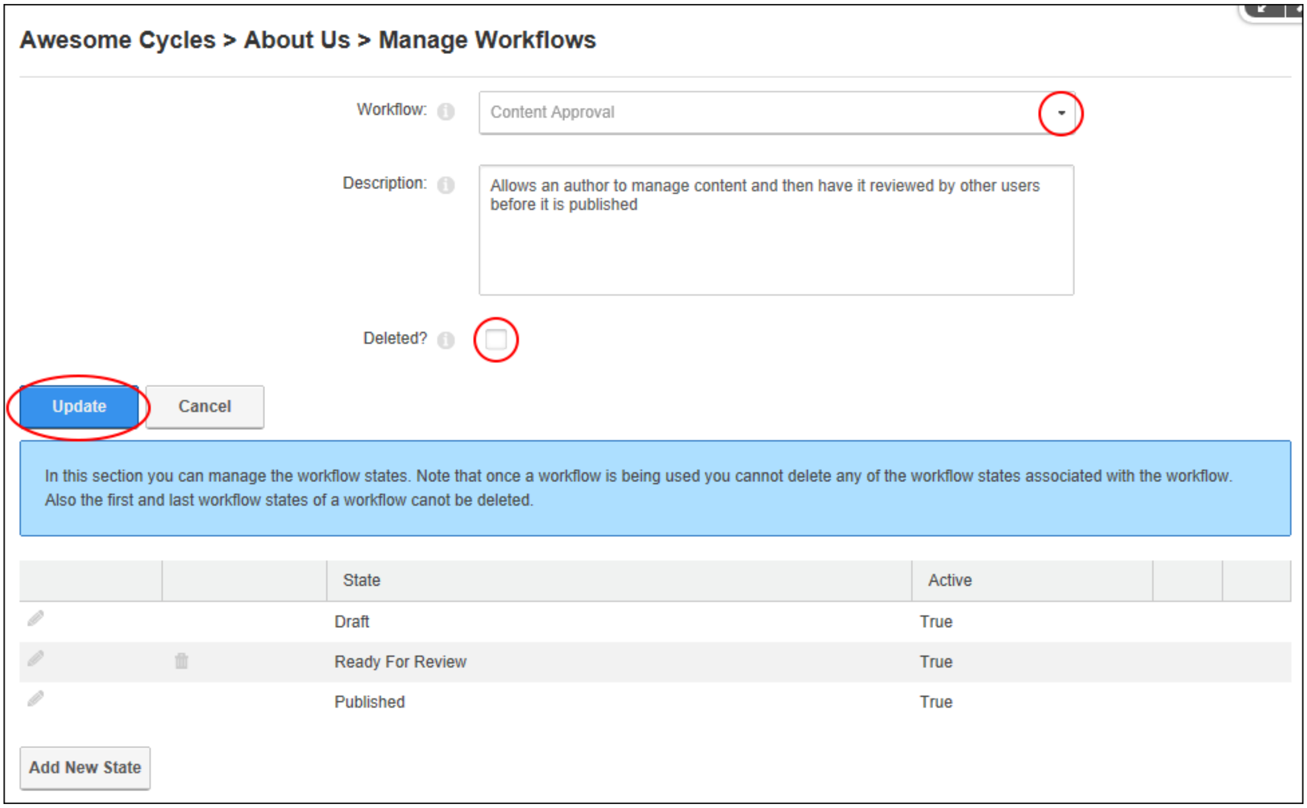
Activating/Deactivating a Workflow

How to set an existing workflow as active or inactive for the HTML Pro module. Active workflows can be set for one or more modules as required. Inactive workflows are not displayed on the Module Settings page and therefore cannot be selected for use, they can however be activated at any time in the future using this same process. Note: Activating a workflow does not apply the workflow to the module, to do this See "Setting a Workflow"

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. Click the Manage Workflows link. This will open the Manage Workflows page.



4. At **Workflow**, select the required workflow from the workflow drop down list.
5. At **Deleted?** select from these options:
   - Mark ☑ the check box to deactivate this workflow. Deactivated workflows cannot be selected when configuring the HTML Module Settings. This allows any existing modules with this workflow set to continue using this workflow if required, whilst preventing this workflow from being selected for future use.
   - Unmark ☐ the check box to activate this workflow for the site. This will reinstate this workflow in the drop down list on the HTML Module Settings page.
6. Click the **OK** button to confirm.

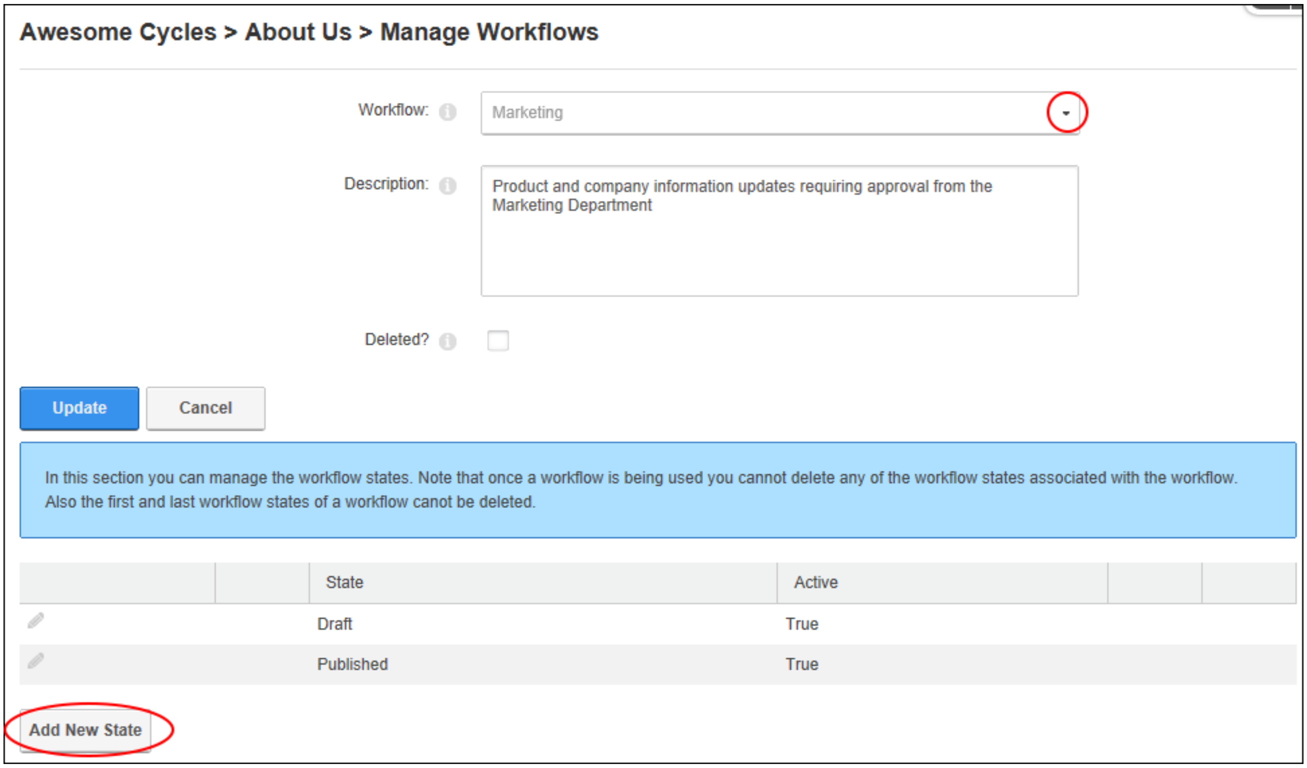


7. You can now activate/deactivate additional workflows, or click Cancel to return to the module.

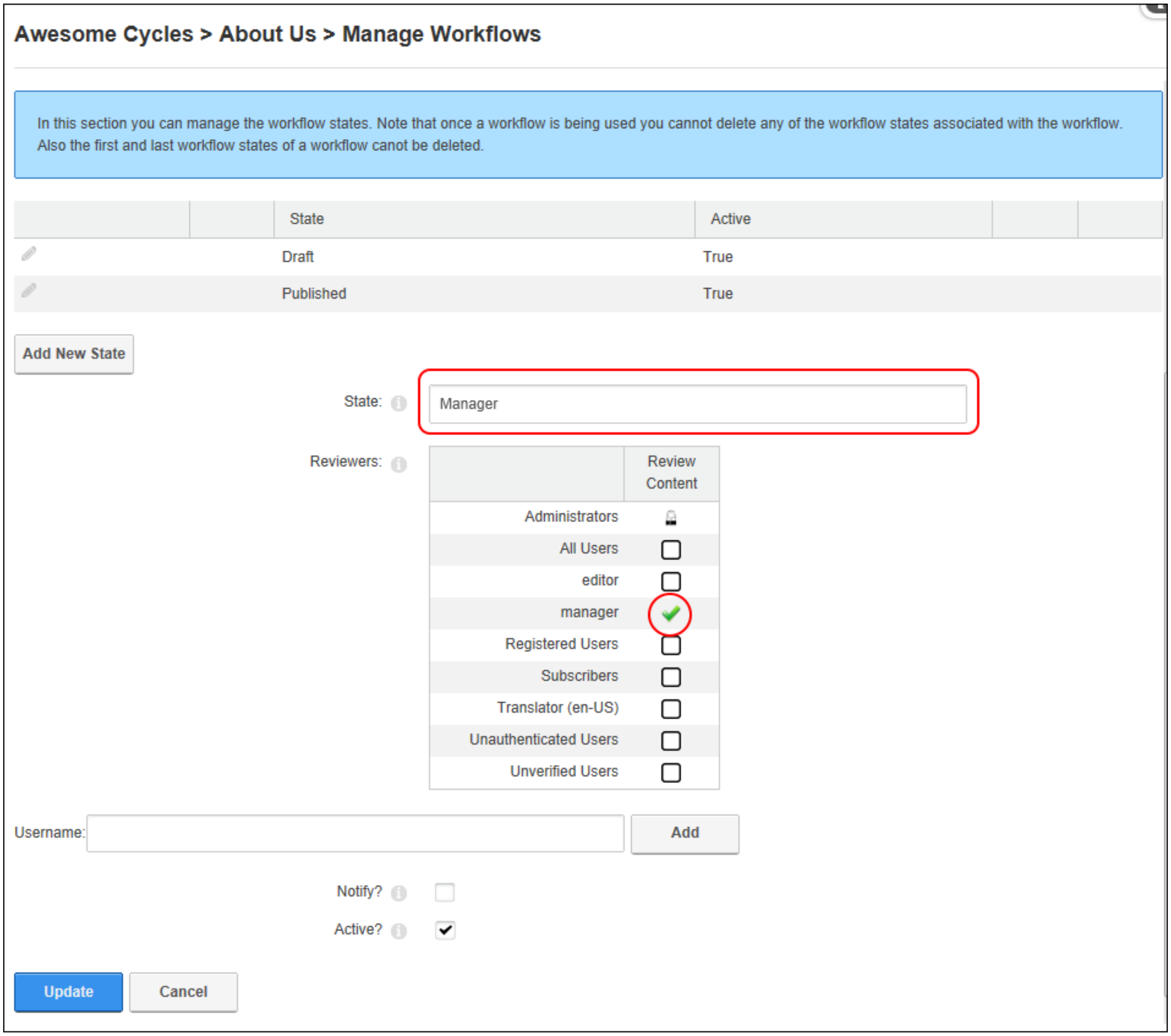
Adding a Workflow State

How to add a new state to a workflow for a HTML Pro module. In this tutorial we will add states to the Marketing workflow that will allows any module editor to add content, then an Editor will review the content, and finally a Manager must give the content a final review and then publish the content.

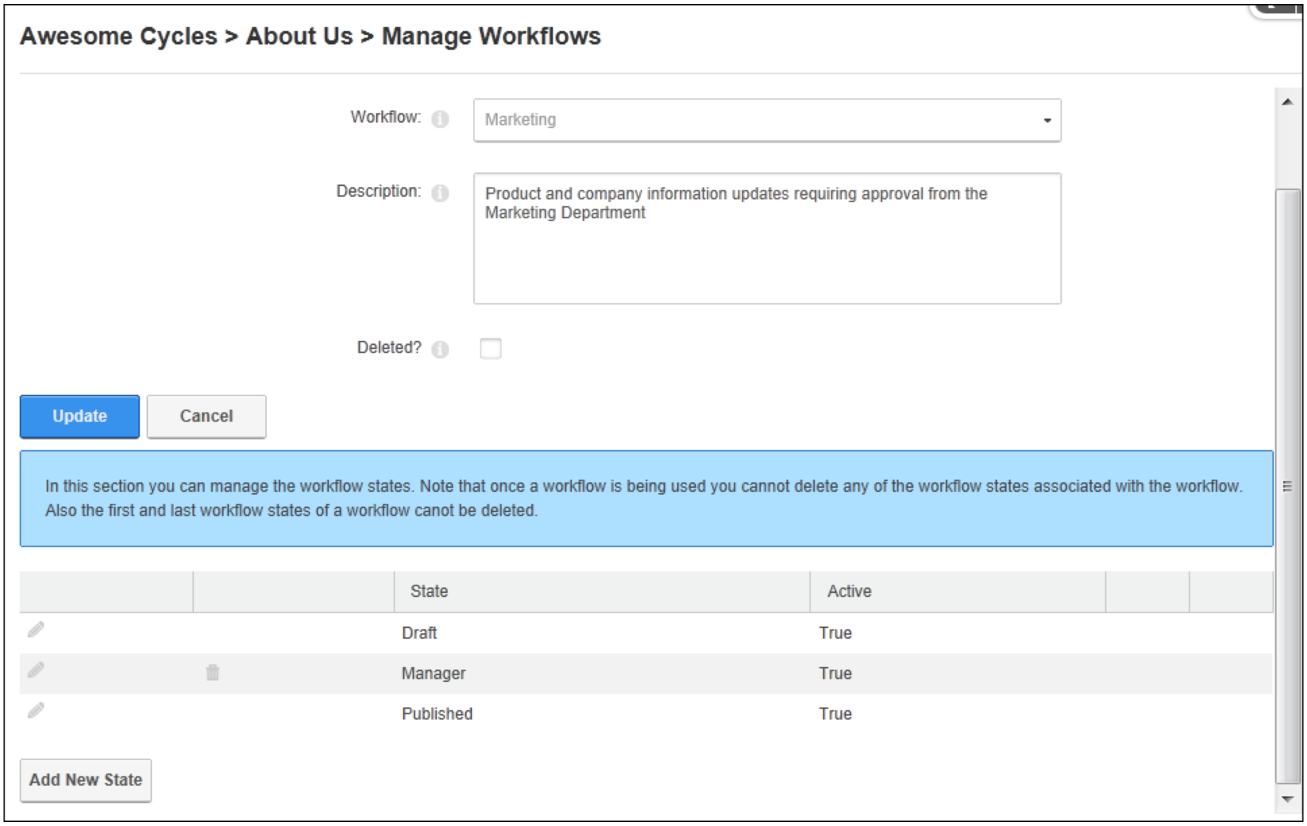
1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. Click the Manage Workflows link. This opens the Manage Workflows page.
4. At **Workflow**, select the required workflow from the workflow drop down list.
5. Click the Add New State link. This displays the State Configuration section.



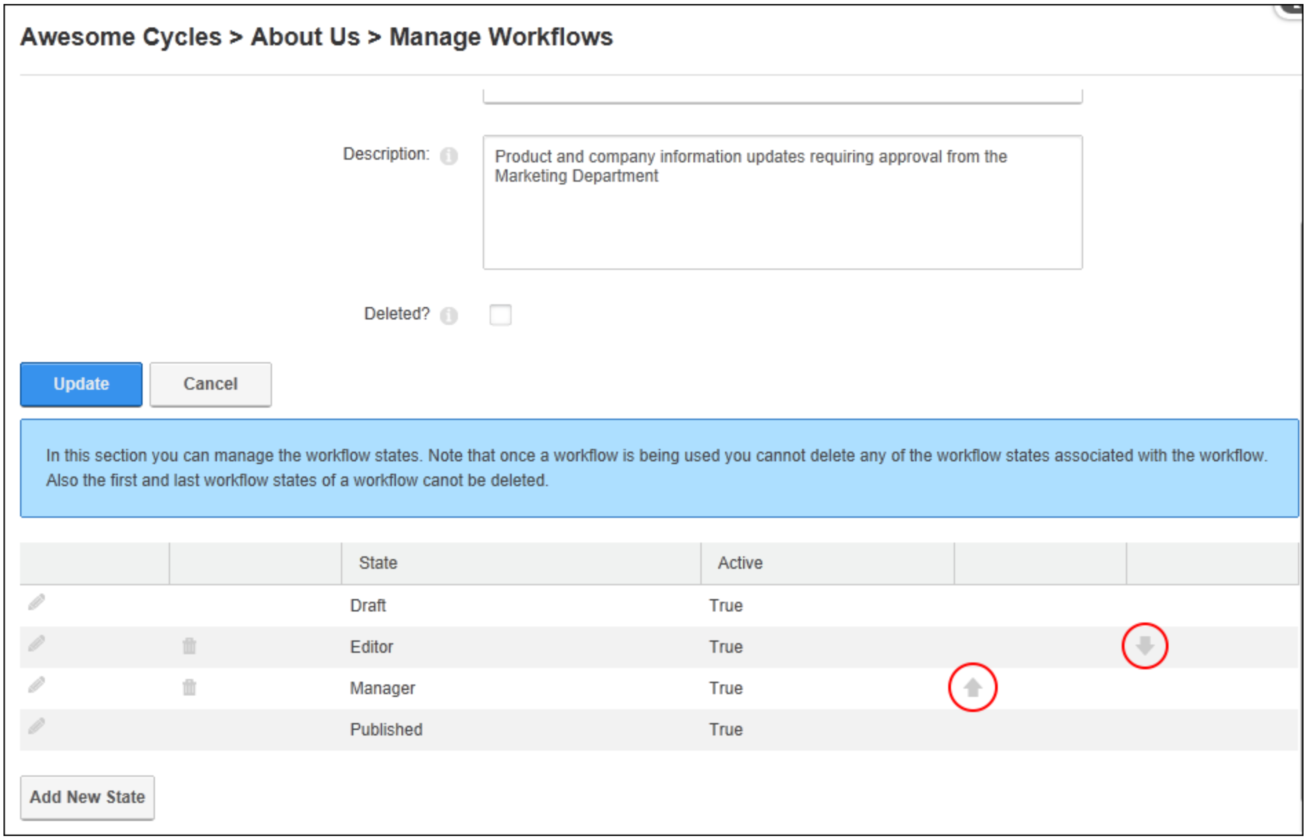
6. In the **State** text box, enter a name for this state.
7. At **Reviewers**, click on the check box in the Review Content column to **Grant** review content permissions to one or more roles and or usernames. You can also choose to Deny review content permissions to roles/usernames. For more details on setting permissions,See "Setting Module Permissions"
8. At **Notify?**, select from these options:
   - Mark the check box to set the reviewers specified at Permissions to receive an email notification once a version reaches this state. For the published state the author of the version will receive an email notification once it is published.
   - Unmark the check box to disable notifications.
9. At **Active?**, mark the check box to enable this new state - OR - unmark the check box if this new state is not currently active.



10. Click the **OK** button to confirm. The newly created workflow state is now listed in the States section.



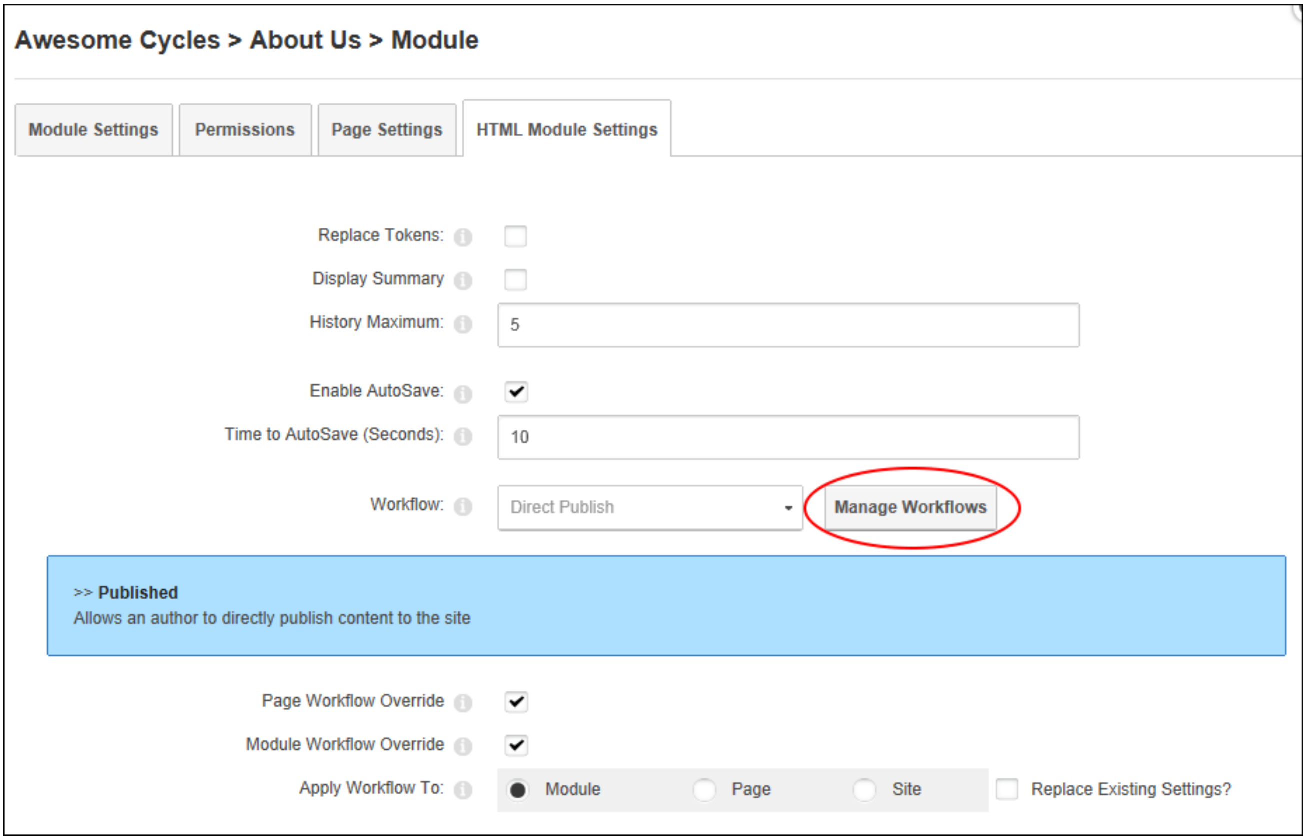
11. **Optional.** Repeat Steps 5-10 to add additional workflow states. For example, an additional state called Editor has been added to this workflow.
12. **Optional.** Use the **Up** and **Down** buttons to reorder each state that you have added according to your workflow requirements. Note that the Draft and Published states cannot be reordered.



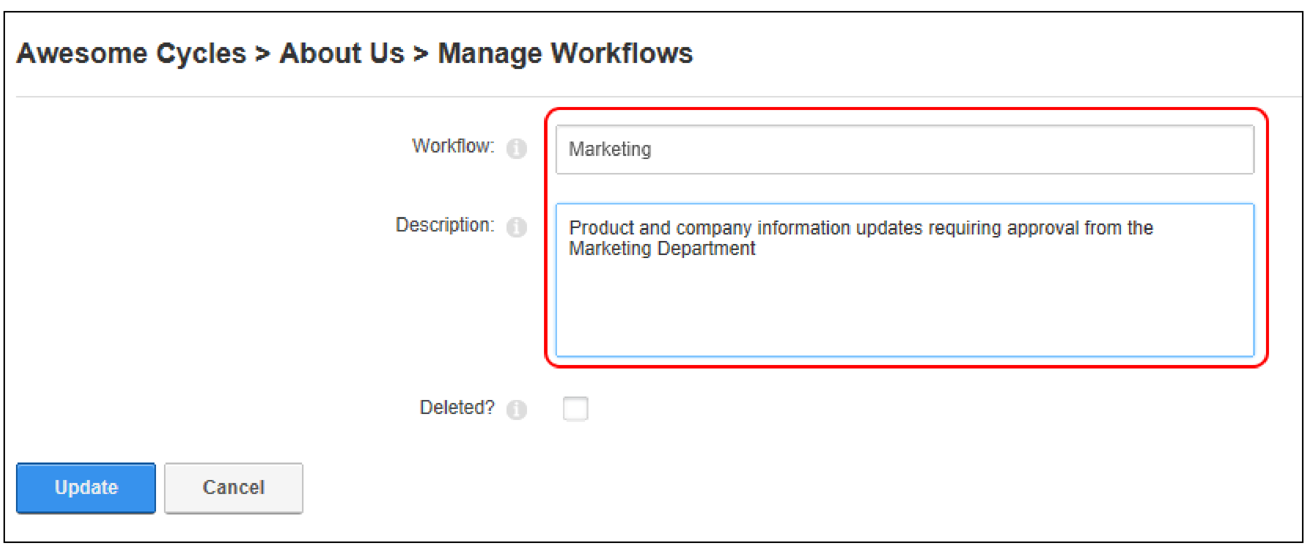
Adding a Workflow

How to add a workflow to the HTML Pro module.

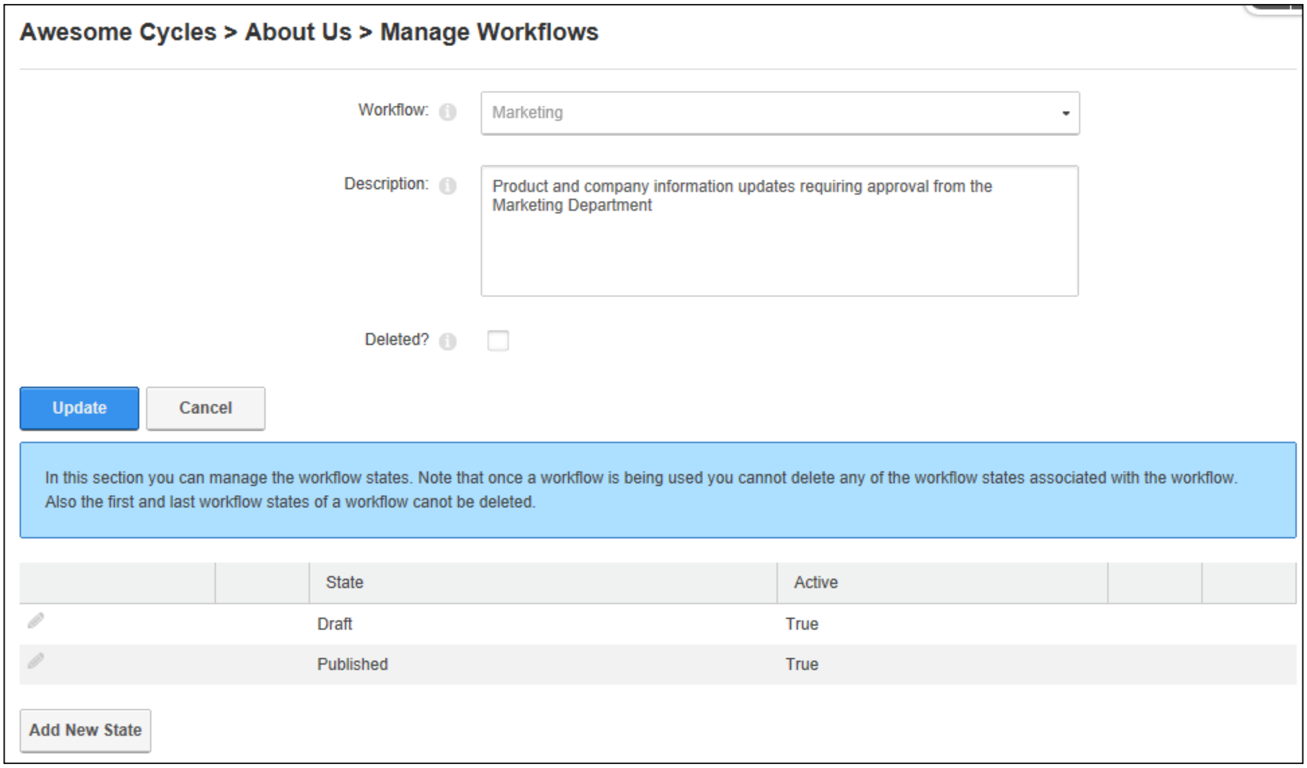
1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. Click the Manage Workflows link. This opens the Manage Workflows page.



4. Click the Add New Workflow link.
5. In the **Workflow** text box, enter a name for this workflow.
6. In the **Description** text box, enter a description of this workflow.



7. Click the **OK** button to confirm. This saves the new workflow and displays the States section that allows you to modify the default workflow states (Draft and Published) that have been created for this new workflow.



Next Step: See "Adding a Workflow State" and continue from Step 7 to add additional states to this workflow.

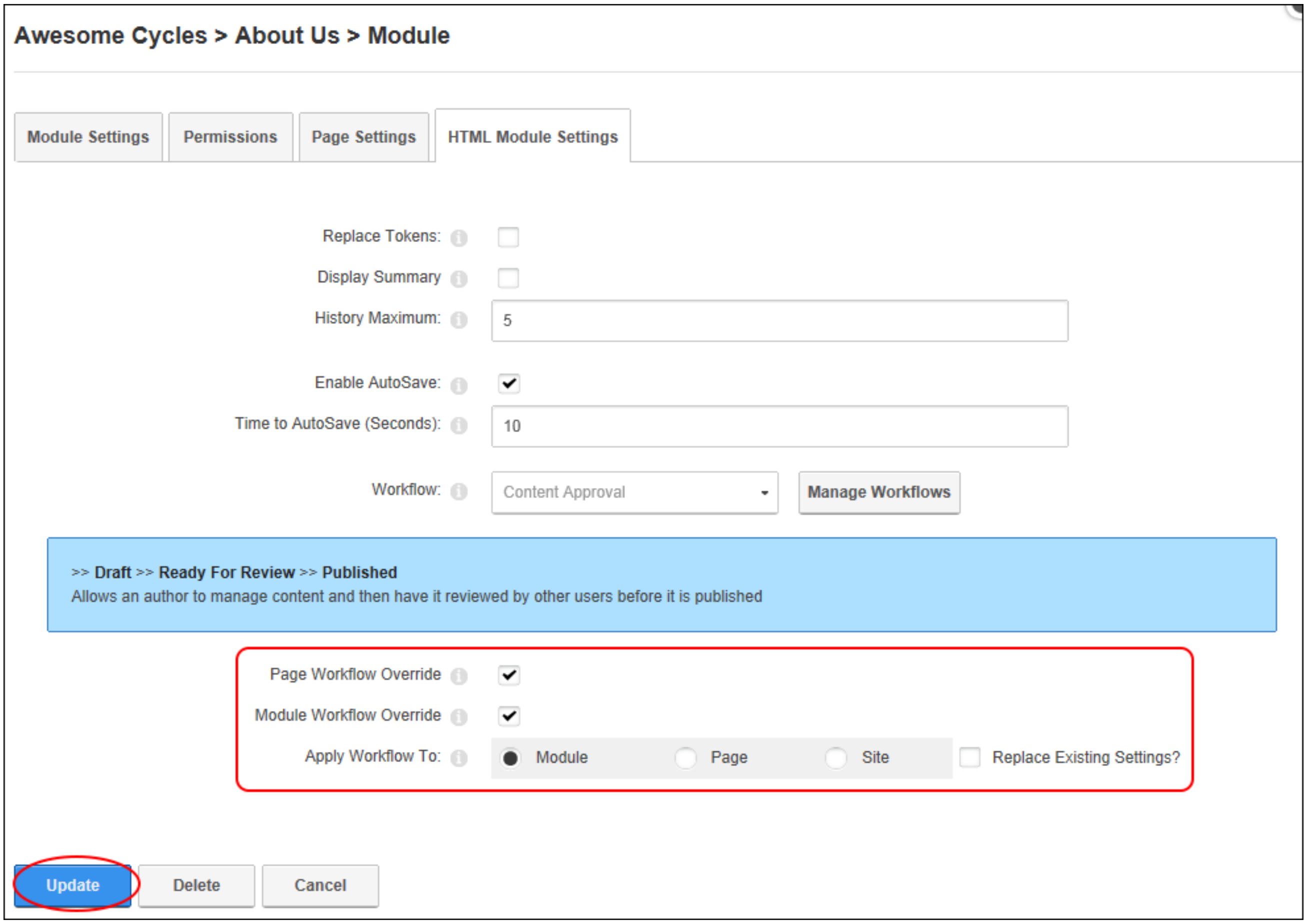
Configuring Admin Workflow Settings

How to configure workflow settings for the HTML Pro module. For more details on the settings available to authorized editors, See "Setting a Workflow".

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Page Workflow Override**, select from these options:
   - Mark the check box to enable site level workflow configuration to be overridden at the page level. This enables the Page option at the Apply Workflow To field below.
   - Unmark the check box to require all HTML Pro modules on all pages to use the workflow configuration defined for the site. This disables the Page option at the Apply Workflow To field below.

4. At **Module Workflow Override**, select from these options:
   - Mark the check box to enable site level workflow configuration to be overridden at the module level. This enables the Module option at the Apply Workflow To field below.
   - Unmark the check box to require all HTML Pro modules on this page to use the workflow configuration defined for this page. This disables the Module option at the Apply Workflow To field below.
5. At **Apply Workflow To**, select from these options:
   - **Module**: Select to apply the workflow set on this module to this module only.
   - **Page**: Select to apply the workflow set on this module to all modules on this page.
   - **Site**: Select to apply the workflow set on this module across all modules on the site.
6. At **Replace Existing Settings?**, mark the check box to replace the existing settings for this Module/Modules on this Page/the whole Site - depending on which of these three options you selected at Step 5.
7. Click the **OK** button to confirm.

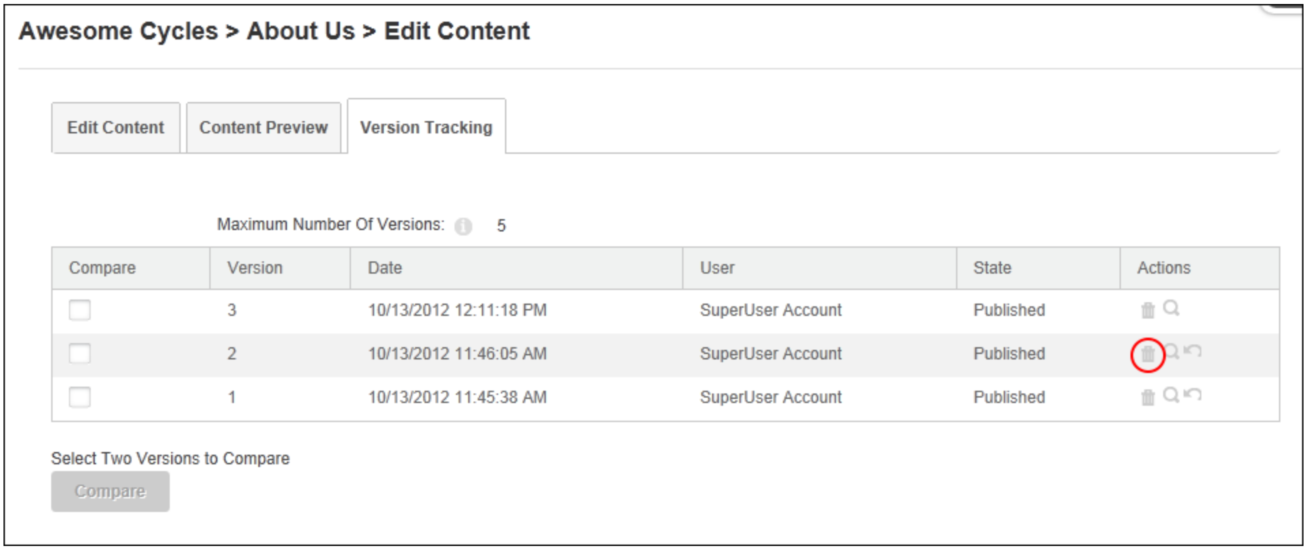
Tip: The Replace Existing Settings field must be checked to apply a workflow at the Page or Site level. This provides a safeguard against Administrators accidentally modifying Page and Site workflows.



Deleting a Content Version

How to delete a specific version of the content using the HTML Pro module.

1. Select **Edit Content** from the module actions menu.
2. Select the **Version Tracking** tab.
3. Locate the version to be deleted.
4. **Optional.** Click the **Preview** button to preview the version. This displays the selected version including details on the related workflow and the Item History on the **Content Preview** tab. Once you have confirmed this is the correct version, reselect the Version Tracking tab.
5. Click the **Delete** button beside the version to be deleted. This displays a message similar to "Are you sure you wish to permanently delete version 3 [that was created on [date] by [username]."

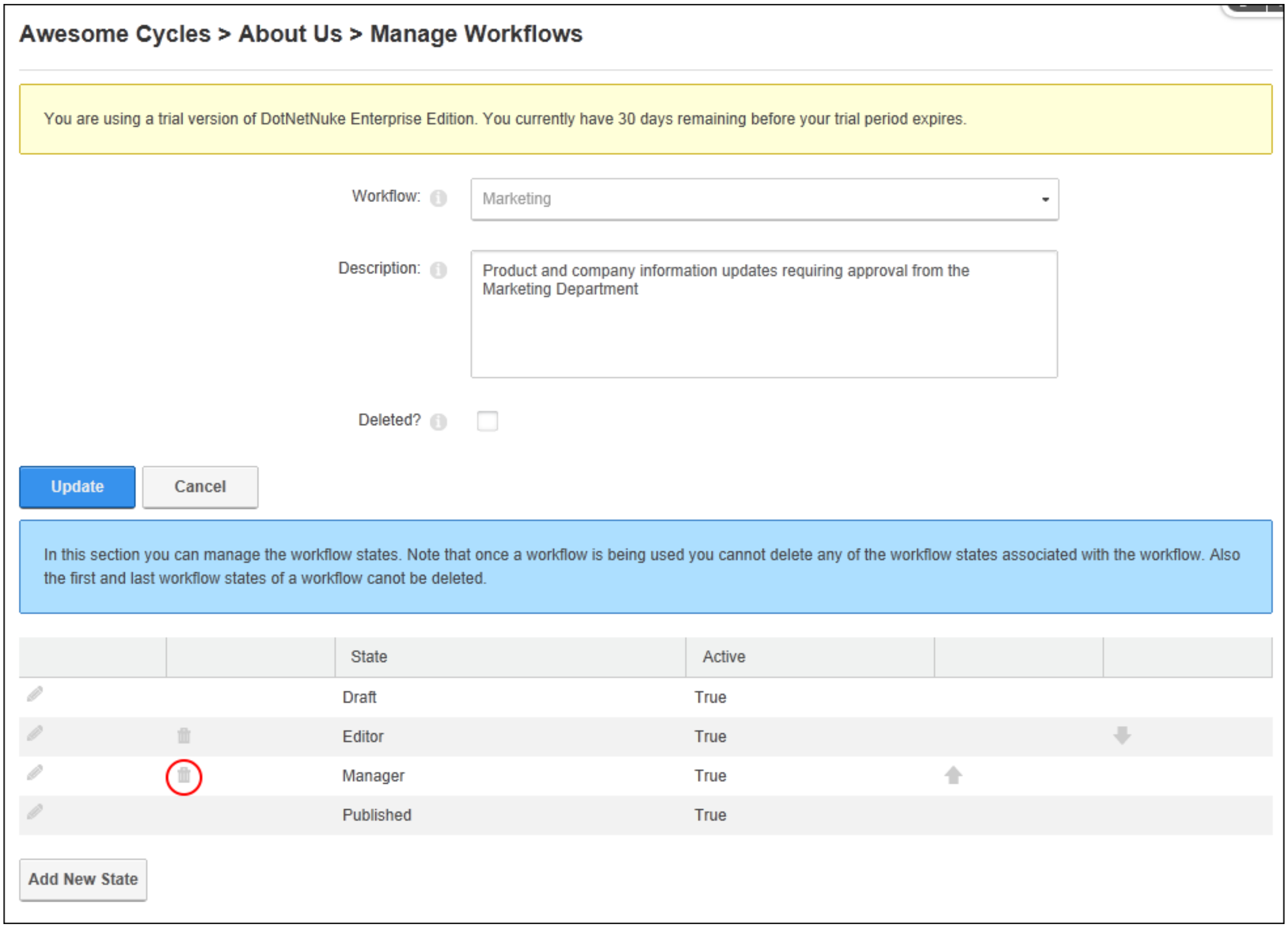


6. Click the **OK** button to confirm.

Deleting a Workflow State

How to delete a state from a workflow using the HTML Pro module.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. Click the Manage Workflows link. This opens the Manage Workflows page.
4. At **Workflow**, select the required workflow from the drop down list. This displays details of the selected workflow in the States section.
5. Click the **Delete** button beside the state to be deleted.

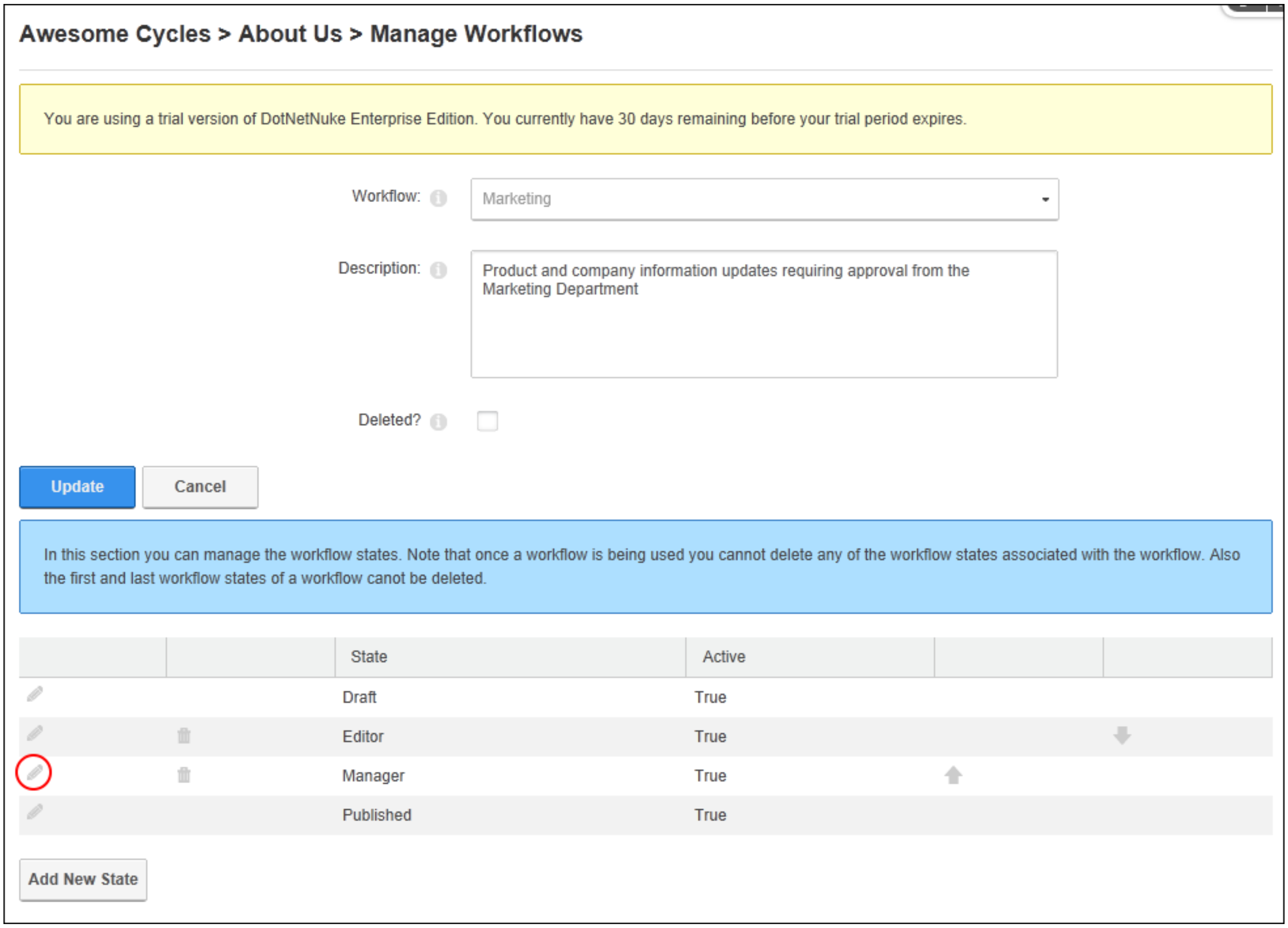


6. This displays the message "Are You Sure You Wish To Delete This Item?"
7. Click **Yes** to confirm.

Editing a Workflow State

How to edit an existing state in a workflow for the HTML Pro module.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. Click the Manage Workflows link. This opens the Manage Workflows page.
4. At **Workflow**, select the required workflow from the drop down list. This displays details of the selected workflow in the States section.
5. Click the **Edit** button beside the state to be edited.



6. Go to the edit any of the following as required:
   1. In the **State** text box, edit the workflow name.
   2. At **Reviewers**, set the roles and/or usernames for this state. See "Setting Module Permissions"
   3. At **Notify?**, select from these options.
      - Mark ☑ the check box to set the reviewers specified at Permissions to receive an email notification once a version reaches this state. For the published state the author of the version will receive an email notification once it is published.
      - Unmark ☐ the check box to disable notifications.
   4. At **Active?**, mark ☑ the check box to enable this state - OR - unmark ☐ the check box to disable this state.
7. Click the **OK** button to confirm.

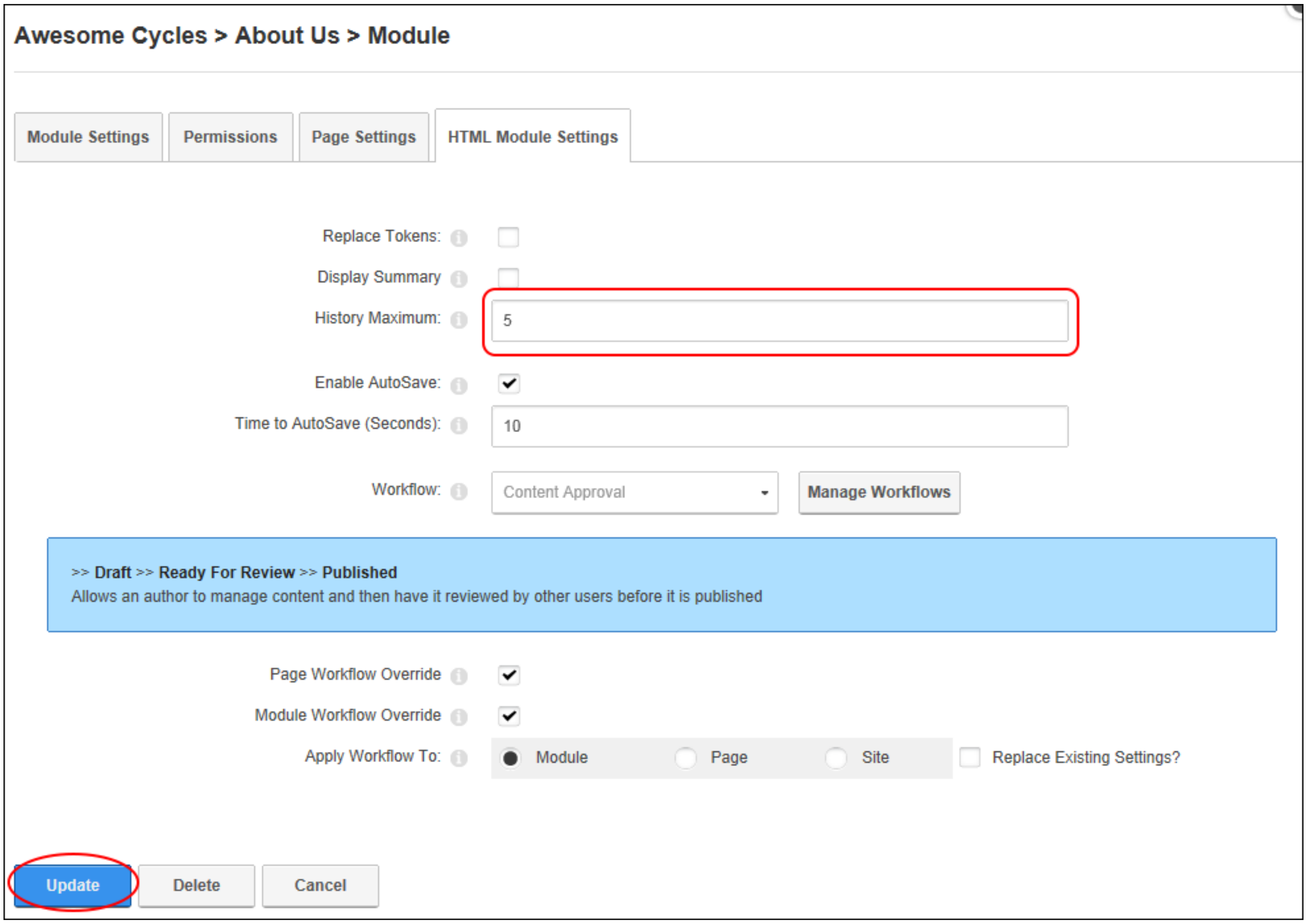
Setting Maximum Version History

How to set the maximum number of versions to keep in the history for each HTML Pro module instance using the HTML Pro module.

When publishing new content results in more versions than this number, the oldest version(s) will be permanently deleted (purged) until the remaining number of versions matches this number. When the value of the maximum number of versions changes from higher to lower, we will purge (delete) all the exceeding version history items ONLY when a new version is created. If the value changes from higher to lower, we retain all the history items UNTIL a new version is created; thus if we do not create a new version and change the value from lower back to higher, then the history items that were not purged, will re-appear.

The purging of older versions may appear to work differently depending on the defined workflow. If content approval is defined somewhere in the workflow, when drafts are created (which are not considered new versions) the above scenario does not apply. Also regarding drafts, drafts are directly related to a version, if a version is purged, then the draft will also be purged. So depending on your workflow, version purging will become more implicit and dependent on your workflow.

1. Select **Manage** > **Settings** from the module actions menu.
2. Go to the **HTML Module Settings** tab.
3. In the **History Maximum** text box, enter the maximum number of versions to save. The default value is 5.
4. Click the **OK** button to confirm.



Setting Maximum Version History

> Tip: The Version History List section on the Edit Content page only displays after the first version of content is saved.

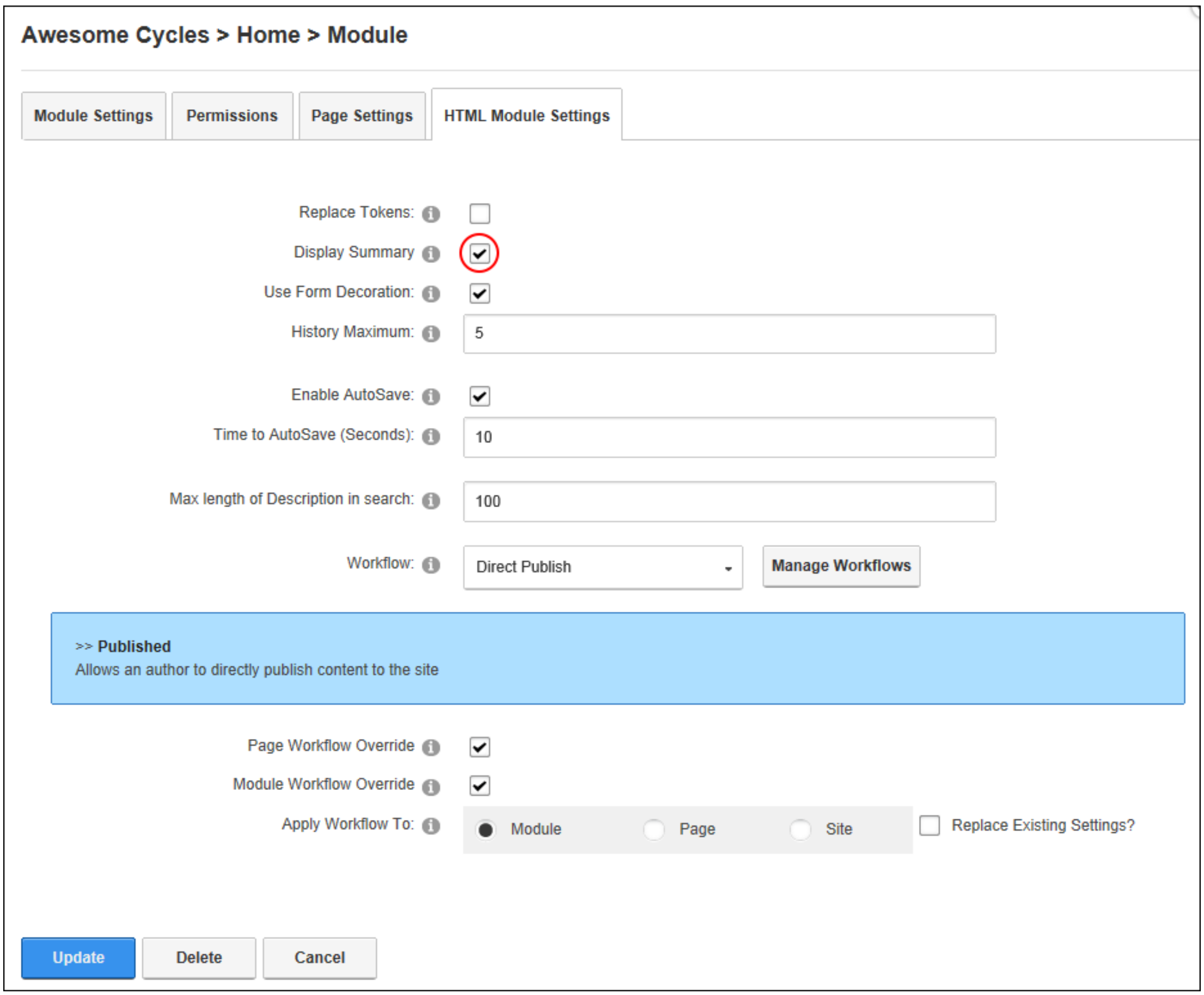
Settings

Displaying/Hiding Summary

The HTML Pro module can be configured to display or hide the content entered into the Summary field on the Edit Content page of a particular HTML Pro module. The summary view is useful to maximize the viewing experience on mobile devices as it enables content editors to create a brief summary of their main HTML content. If summary view for the HTML content is enabled, it will show the Summary View by default. To view the full HTML content click on the

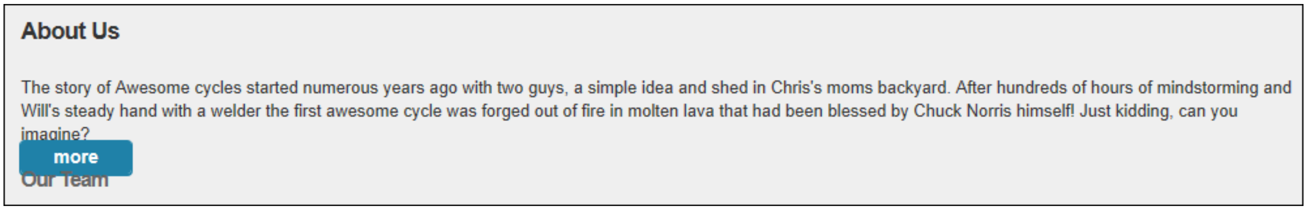
More button. If the field is set to display the summary, then it will show in the module with a **More** link that can be clicked to view the main content.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Display Summary**, select from these options:
   - Mark the check box to display the summary with a Read More link to view the Main Content.
   - Unmark the check box to hide the summary and display the Main Content.

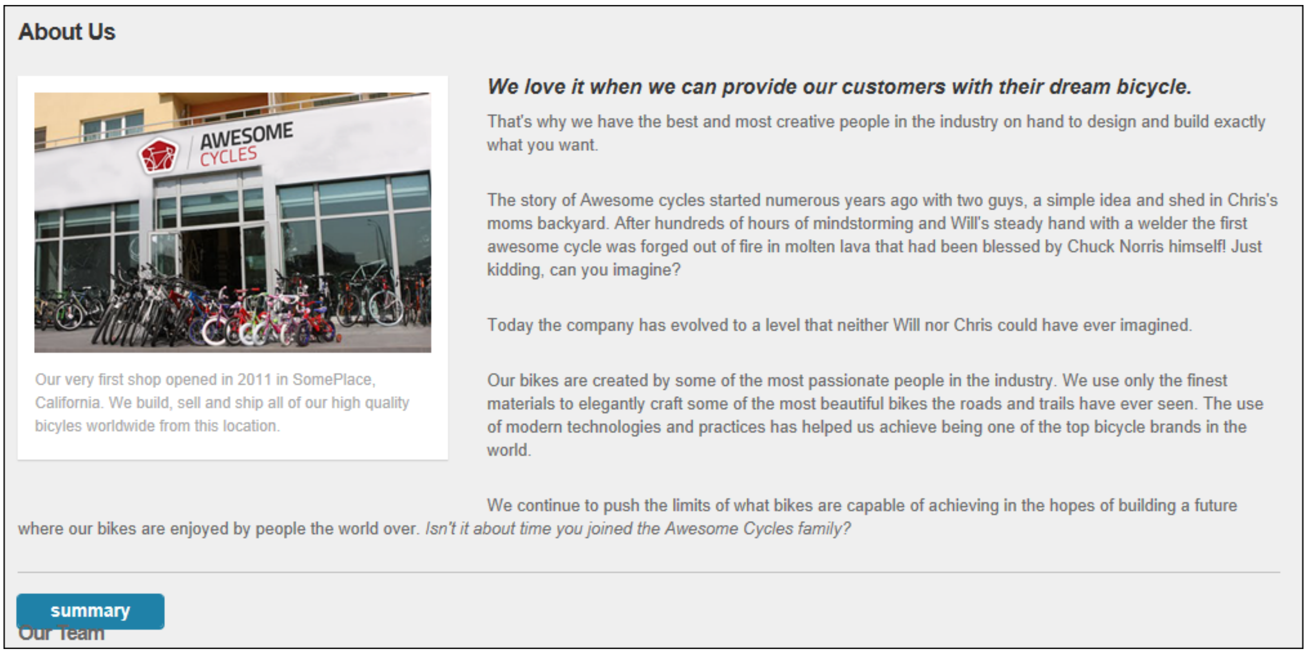


4. Click the **OK** button to confirm.

The following image displays the Summary content with the More link.



Clicking on the More link displays the main content with the Summary link. Click the Summary link to hide the main content and once again show the summary.

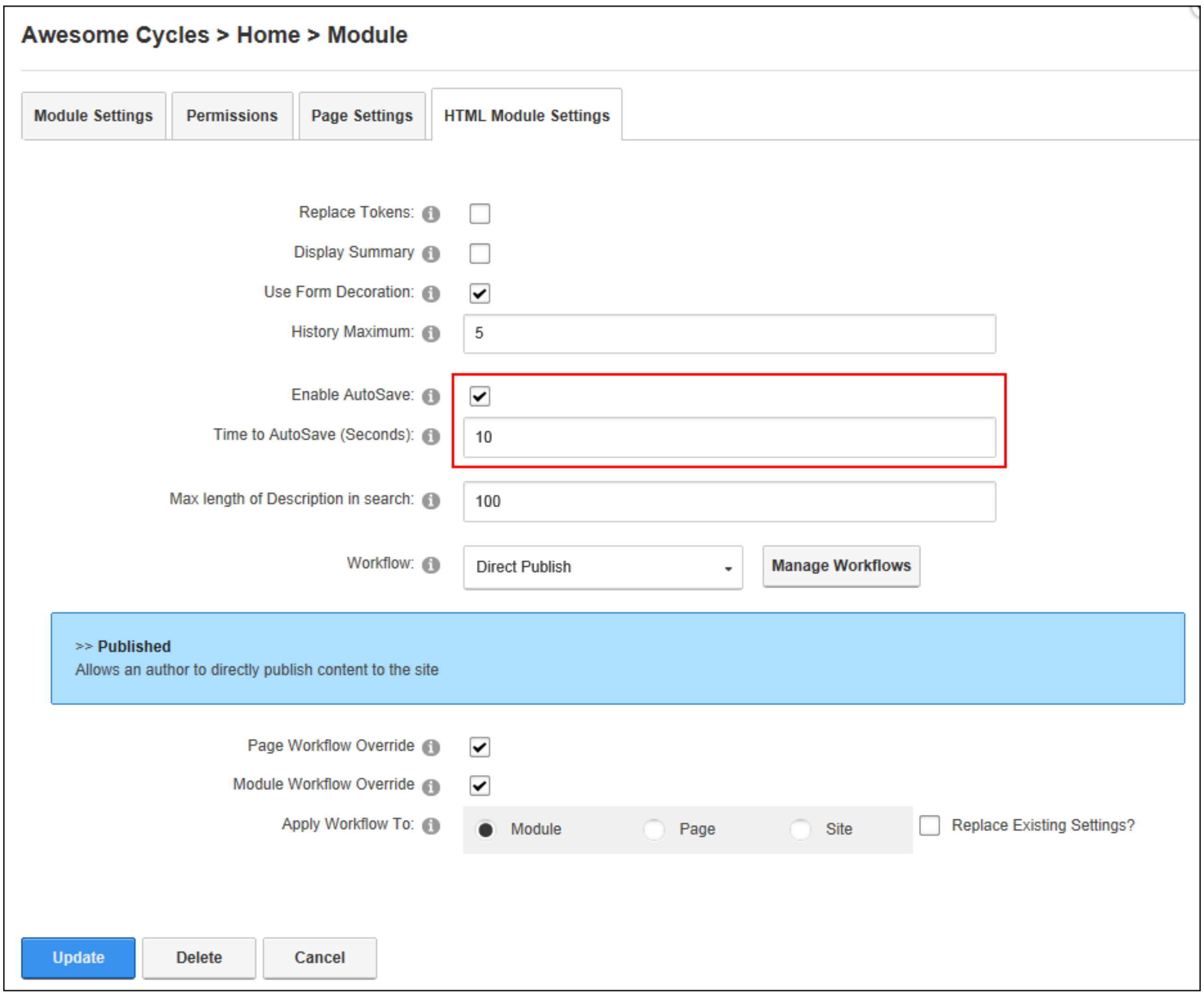


Enabling/Disabling AutoSave

The HTML Pro module includes an AutoSave feature that ensures content that is entered into the Editor which has not been updated will be saved to a temporary location regardless of external events such as lost Internet connections or browser crash or system crash or user error. When a user edits content of a module with AutoSave enabled, the page will automatically save the inline content to a temporary location. AutoSave is enabled on the site by default.

Here's how to enable or disable the AutoSave feature:

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Enable AutoSave**, select from these options:
   - Mark the check box to enable AutoSave for all modules of the same type.
     1. In the **Time to AutoSave (Seconds)** text box, enter the number of seconds (minimum of 10 to a maximum of 120 seconds) between each AutoSave. The default setting is 10 seconds.
   - Unmark the check box to disable AutoSave.



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

Related Topics:

- See "Managing AutoSaved Content"

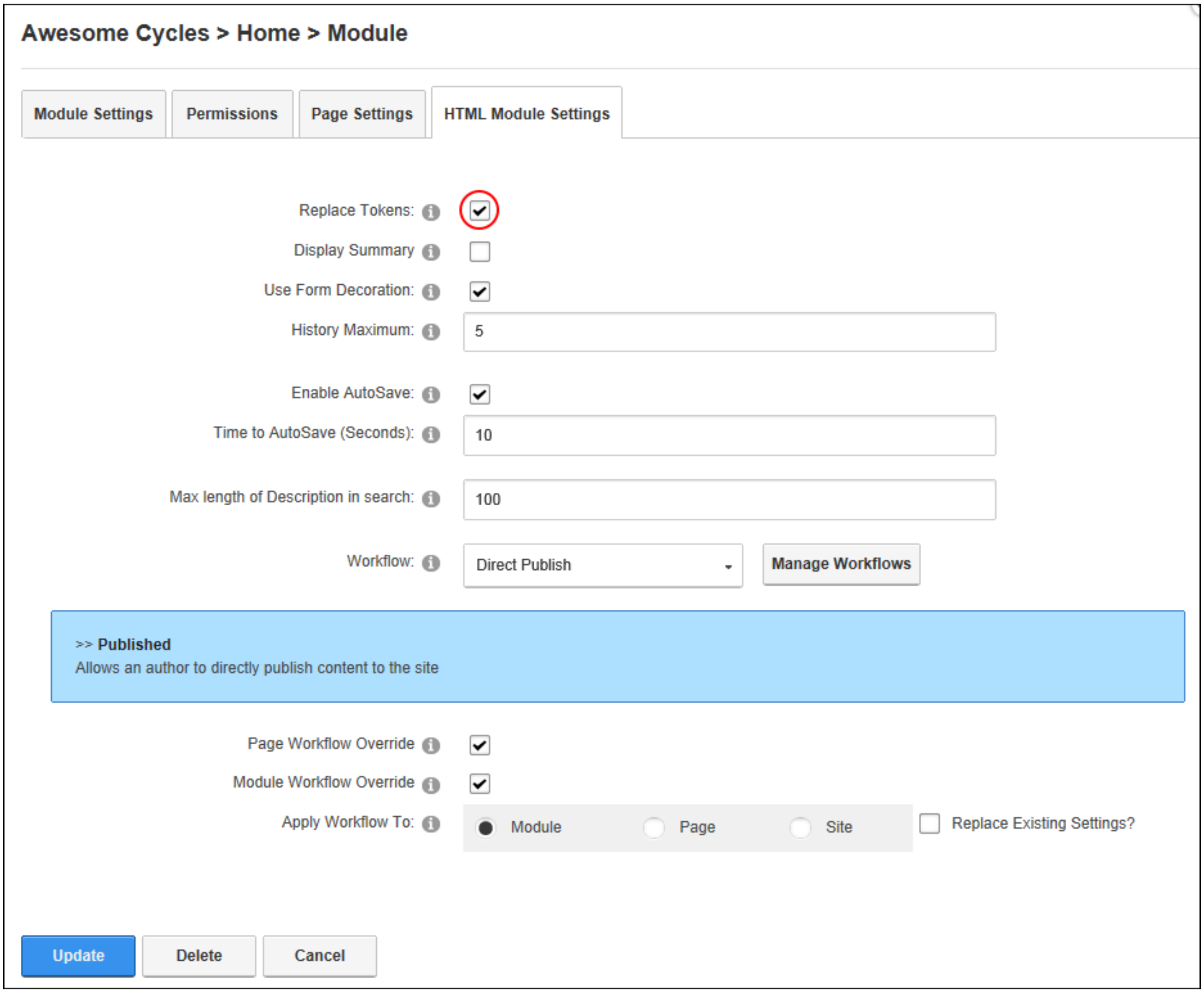
Enabling/Disabling Token Replacement

How to enable or disable token replacement on the HTML Pro module. Token replacement enables tokens such as [FirstName] to be replaced with the first name of the authenticated user. Tokens include information such as user details, site name, key words, date, time, etc.

Important. Inline editing and module caching are disabled if token replacement is enabled.

Important. Users must have Add Content/Edit permissions to the Page on which the HTML Pro module is located in order to manage module settings.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Replace Tokens**, select from these options:
   - Mark the check box to enable full token replacement.
   - Unmark the check box to disable token replacement. This displays any tokens as text in the Editor.



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

Related Topics:

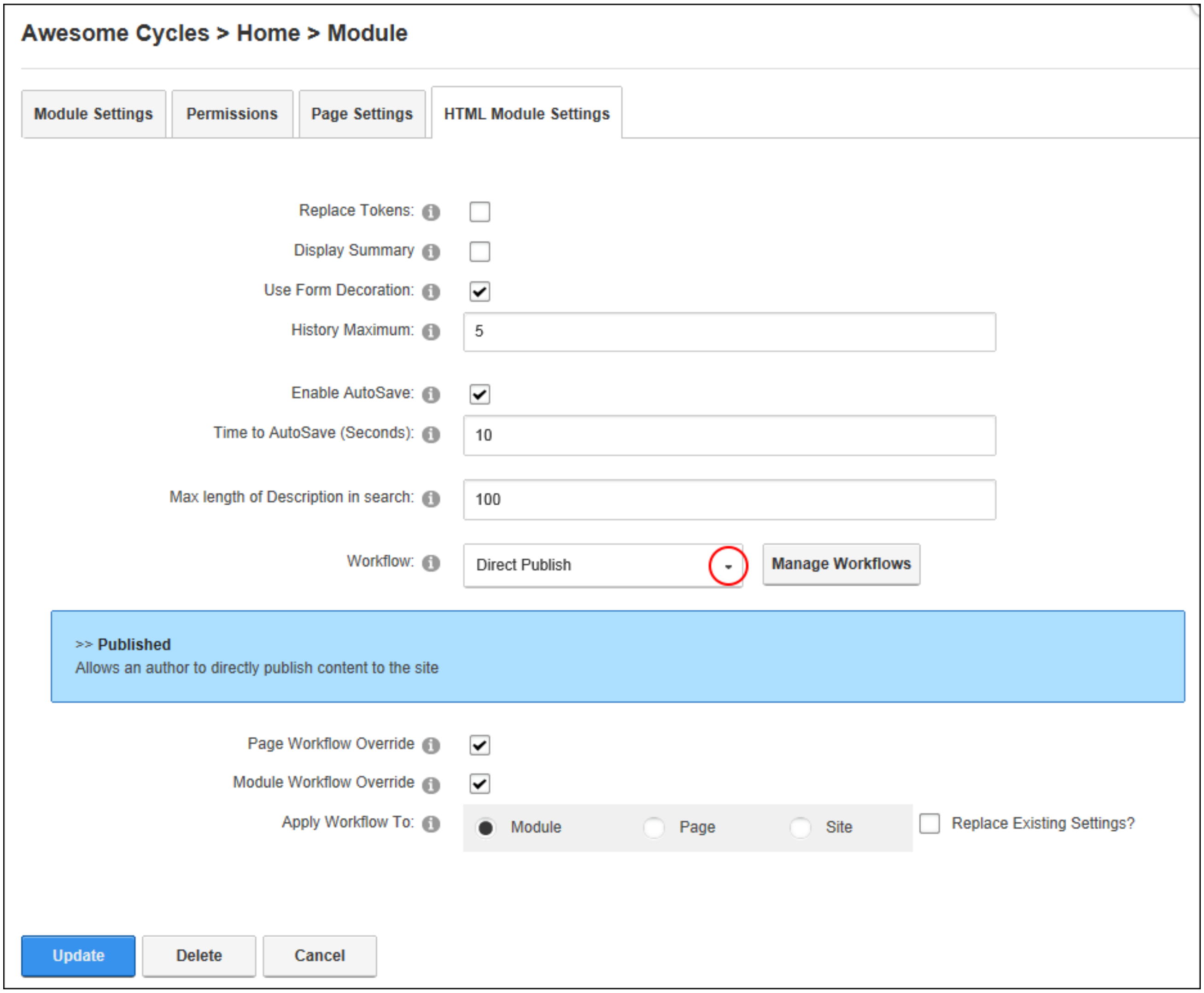
- See "Adding Replacement Tokens"

Setting a Workflow

How to set the workflow for the HTML Pro module. The below settings are available to authorized editors. Note: Administrators can also set a workflow as the site default. See "Configuring Admin Workflow Settings". Users must be granted Edit Page permissions to the page where the HTML Pro module is located.

Tip: Whether it is for an individual module or you wish to set the default for the site an HTML Pro module must first be added to some page on your site.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Workflow**, select the workflow you wish to use from these options:
   - **Content Approval**: Content Approval is similar to Save Draft but it adds an extra "Ready for Approval" state between the draft and published states. This allows reviewers to monitor and either approve or reject any content added before it is actually published to the site.
   - **Save Draft**: Save Draft allows content to be saved as a draft before it is published. Draft content will only be visible when edit mode is selected by users who can edit the module/page. In view mode the most recent published version of content will be displayed instead of the draft. This is the same for users with view permissions only. See "Publishing a Draft"
   - **Direct Publish**: With the direct publish workflow any content that is saved on the Edit Content page or through the inline editor will be immediately visible to all users with permissions to view the module. Editing users will be able to see the content for both view and edit mode.
4. At **Module Workflow Override**, select from the below options. Note: This option will be disabled if Page Workflow Override has been disabled by an Administrator.
   - Mark the check box to enable page level workflow configuration to be overridden at the module level. This enables a unique workflow to be set for this module, rather than using the workflow set for all modules on this page by an Administrator.
   - Unmark the check box to set all modules on this page to use the workflow defined for the page.
5. At **Replace Existing Settings**, mark the check box to replace the existing settings with these new settings. This option must be selected to override the previous settings. It exists as a safeguard against accidental changes.

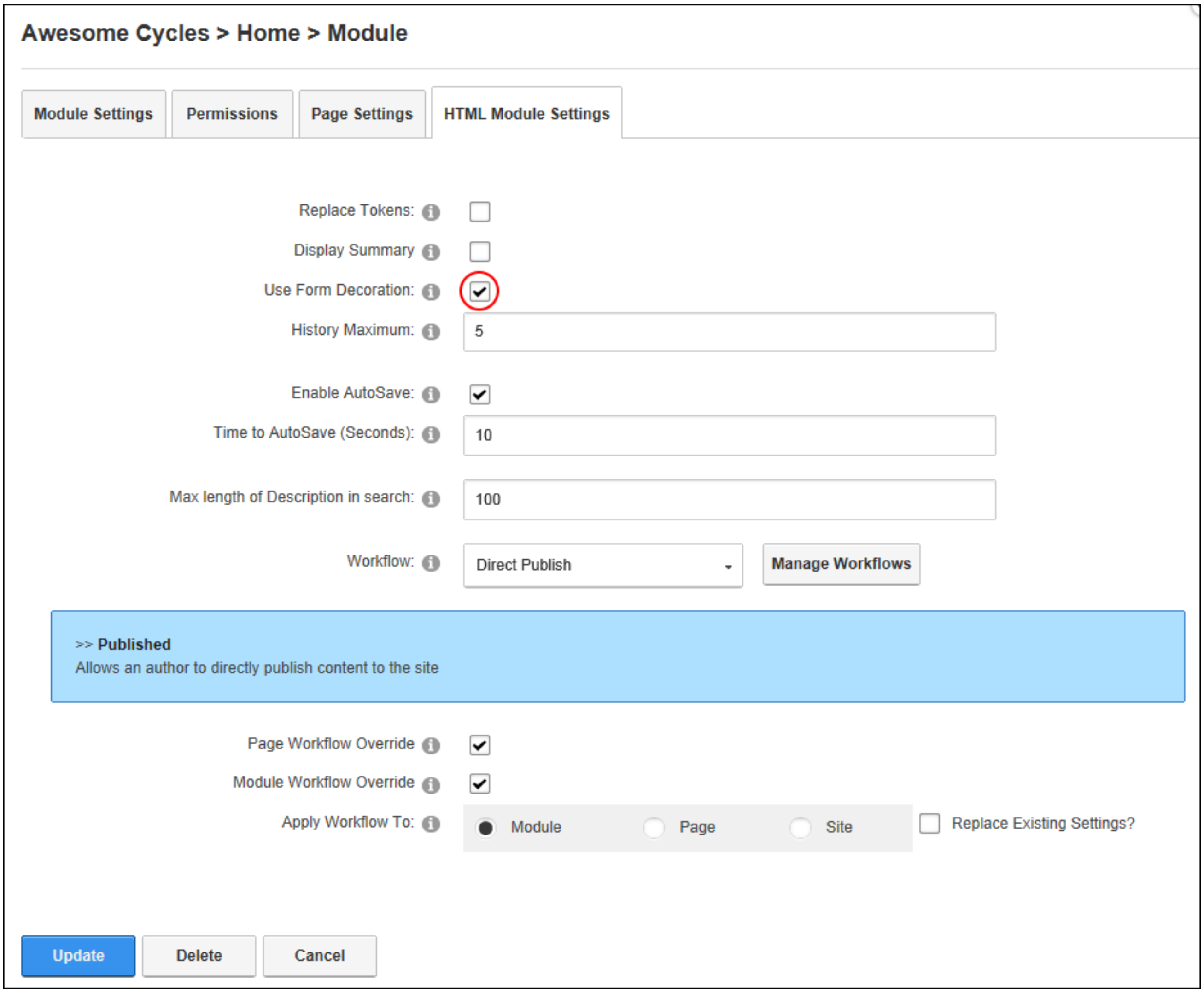


6. Click the **OK** button to confirm.

Enabling or Disabling Form Decoration

How to enable or disable decoration on form elements such as check boxes and radio buttons that have been added to this HTML Pro module.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **HTML Module Settings** tab.
3. At **Use Form Decoration**, mark the check box to enable - OR - unmark the check box to disable.



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

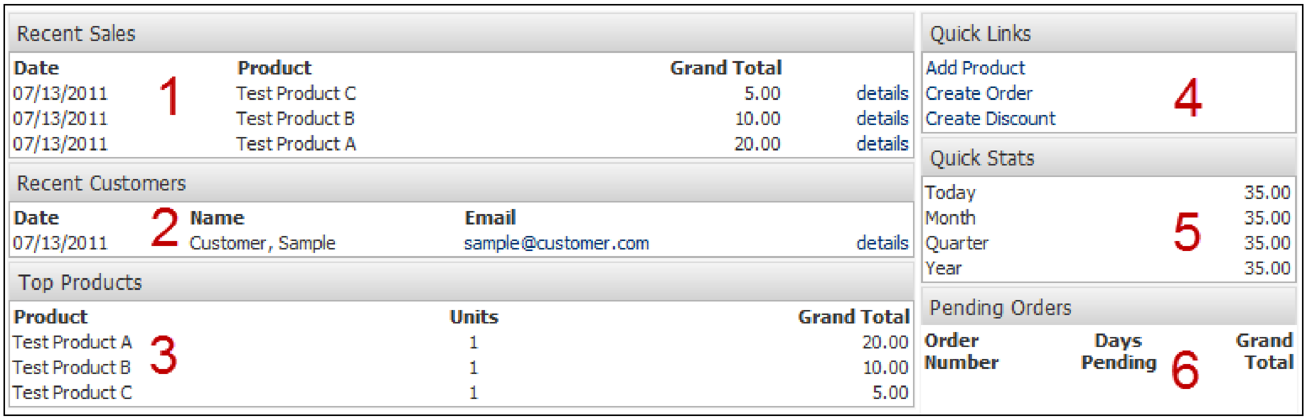
Commerce

About Commerce

Commerce (titled Pro_Commence) is a lightweight and extremely powerful tool that allows DNN sites to process payments, assign roles, and sell products, services and access to content on the site.

Installation Note: This module is typically installed on the site.

Module Version/Minimum DNN Version: The version number is always the same as the DNN framework version number.



The Commerce Module

Commerce FAQ's

Frequently asked questions regarding the Commerce module.

Q. Why does PayPal say the payment has already been completed, when the customer did not log in to PayPal yet?

A. PayPal has a setting that prevents charging a customer twice for the same purchase. If you have reinstalled Commerce at any point, the Invoice numbers it is currently using may be conflicting with invoice numbers stored in the PayPal system from the last time the Commerce module was installed. Changing the Order Number to a value higher than any previously used will avoid this issue. This setting is found on the General tab of the Options & Settings page in the control panel.

Q. How do I create a site specific list for the List type product property?

A. To create a site specific list, you may need to download an additional module. One such module is available here: http://portallists.codeplex.com

Q. How do I select a different Credit Card Payment Provider?

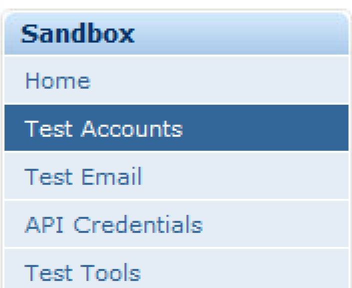
A. This information will be available in the Wiki on www.dnnsoftware.com.

Q. How do I create a PayPal test account?

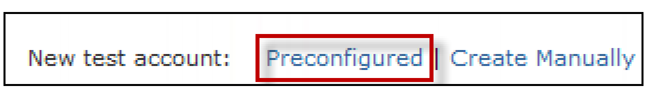
A. Complete the below tutorial:

1. Navigate to https://developer.paypal.com/
2. Click the orange **Sign Up Now** button.

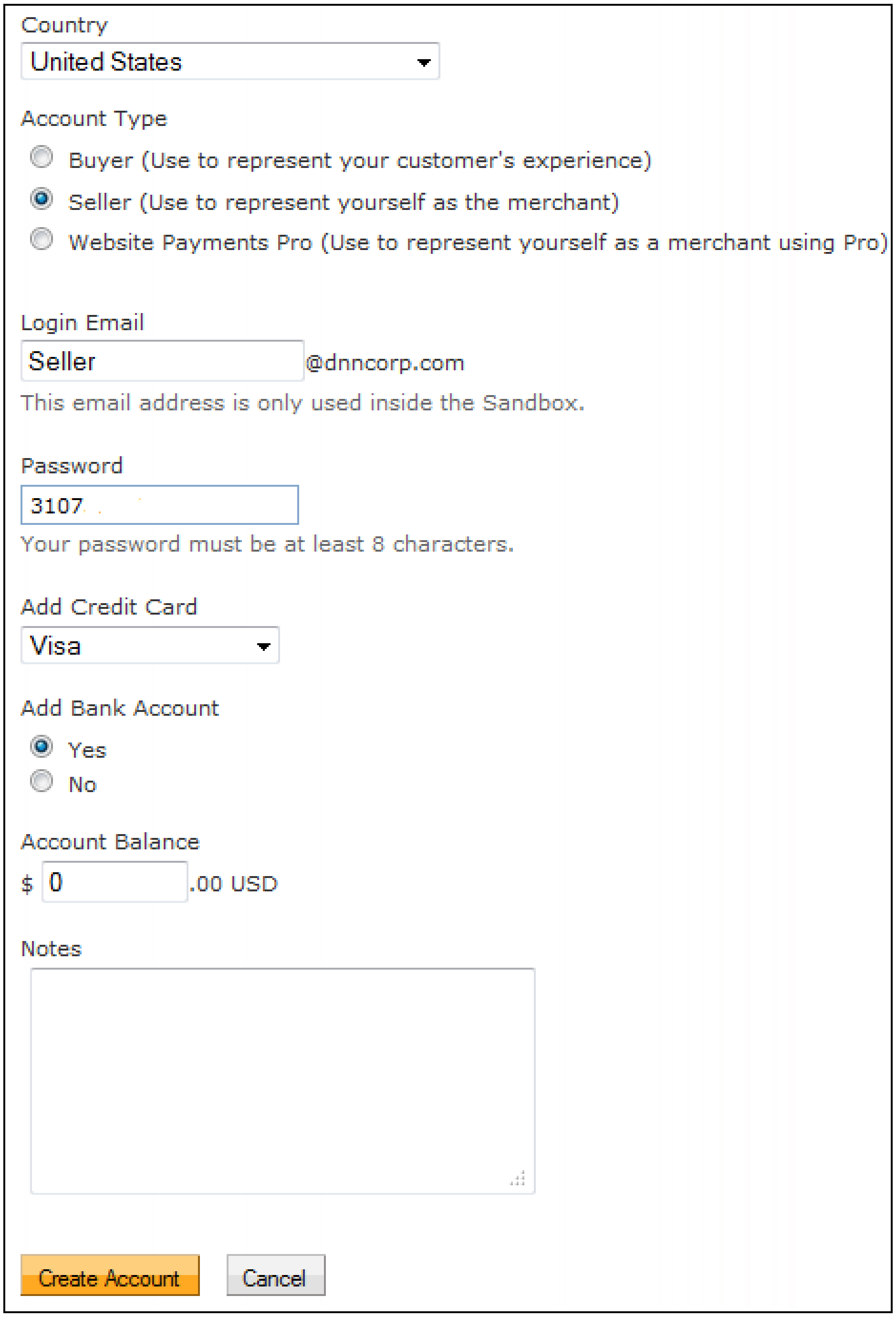
3. Complete the required fields. You should use a valid email address, but not one associated with a live PayPal account. Click Agree and Submit when finished.
4. PayPal will send an email to you. Locate the email and click the link to verify your email address.
5. Login with the new account.
6. Click **Test Accounts**.



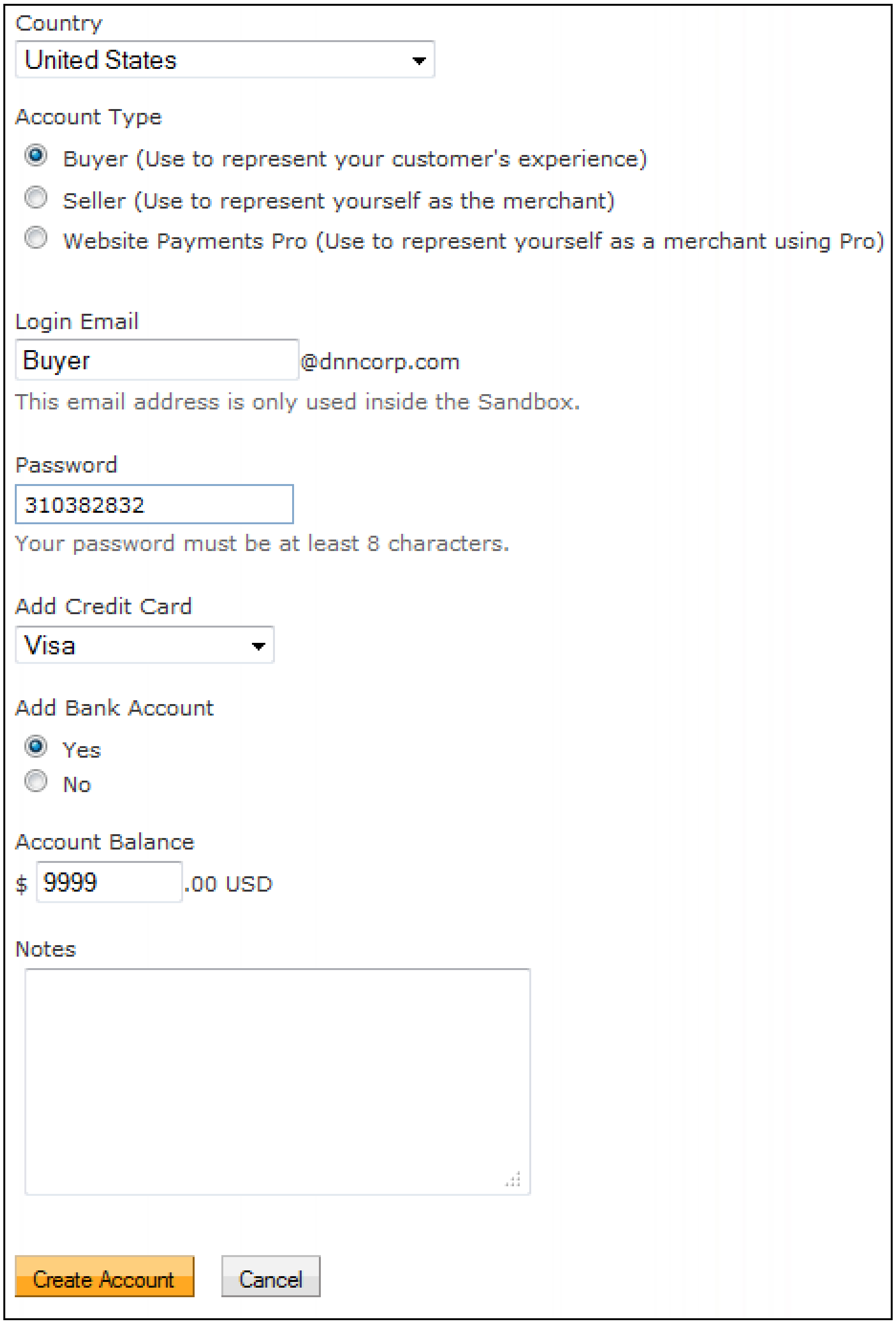
7. Click New Test Account: Preconfigured



8. Set the Account Type to **Seller**. The email address is only used in the sandbox test area, so choose something you will remember. The password will probably change when you reset the test account later, so write this down. Add a bank account and a credit card, to make sure the account is "verified".

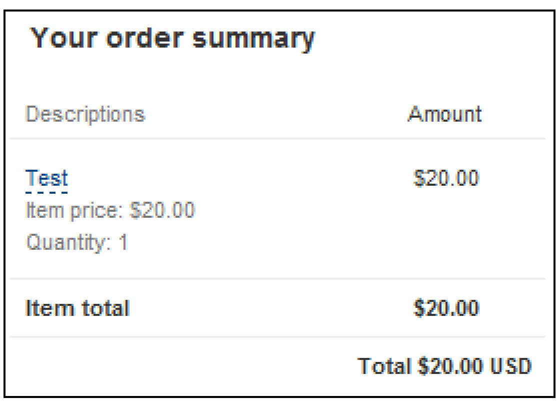


9. Click **Create Account**. After the system finishes creating the account, click Preconfigured again.
10. This time you will configure the Buyer account. The email address should be different, and the account balance should not be zero.



11. You should now see the two accounts listed. If at any point you need to create a new password, or change the account balance, click the Reset link next to the appropriate account.

12. Copy the email address for the buyer account. It is likely that PayPal added a bunch of numbers and _biz to the address.
13. In another browser tab, navigate to the Commerce control panel > Options & Settings > Payment Options tab.
14. Paste the seller test account email address in the Account Id box in the PayPal Details section.
15. Back on the PayPal site, select the radio button next to the buyer account and then click the Enter Sandbox Test Site button.
16. Copy the URL then paste it in the PayPal URL box in the Commerce control panel.
17. Close the Sandbox Test Site window, but do not logout of the Sandbox account. You will need to remain logged in to https://developer.paypal.com/ while doing any PayPal testing.
18. Enter a value in the Language box in the Commerce control panel. The Language is to be entered using the PayPal language code. The PayPal language codes are: Australian - **AU**, Chinese - **CN**, English - **EN**, French - **FR**, German - **DE**, Italian - **IT**, Japanese - **JP**, Spanish - **ES**, or United Kingdom **GB**.
19. Confirm that PayPal is selected as one of the Payment Options then click Save in the control panel.
20. Exit the control panel, and begin a new purchase. At the Review & Payment step, select PayPal from the drop down list. Click Process My Order.
21. You will be redirected to the PayPal Sandbox Test Site. The details of the purchase should be visible on the left side of the screen.



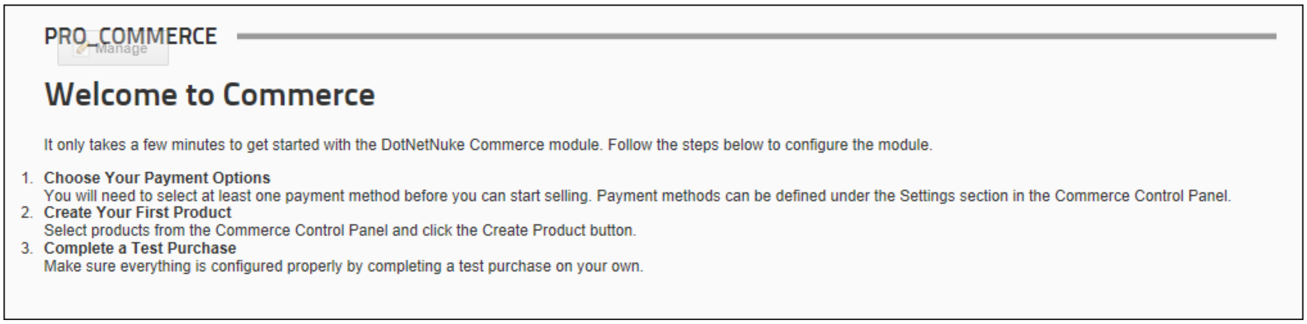
22. Click the Have A PayPal Account? link and then log in using the Buyer test account email and password.
23. Click the **Pay Now** button.
24. Click Return to [Your Name's] Test Store.
25. You should now see the usual Order Completed step in Commerce.
26. Enter the control panel, go to the Orders page, and confirm that the order processed correctly.

27. Viewing the Order Details Post Purchase Log will show information about the transaction. There should be an IPN Received entry if it processed correctly.

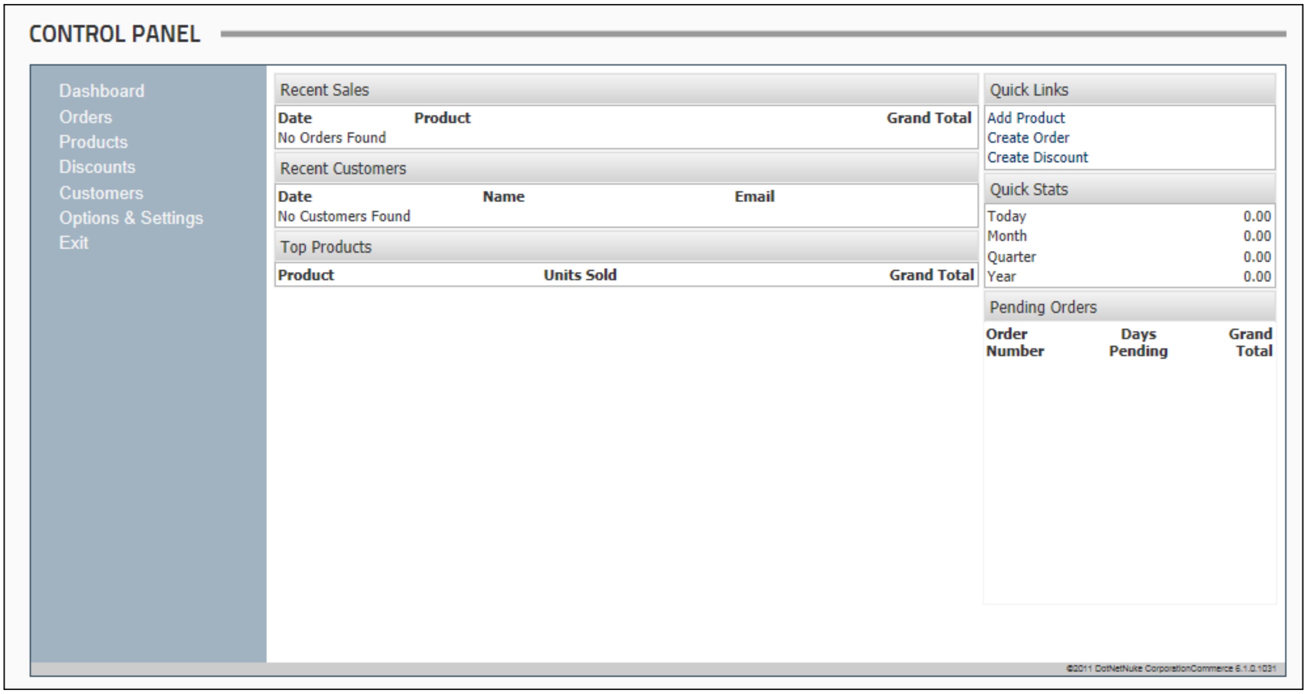
Date	Action	Results	Note
7/15/2011 10:21:12 AM	Send User to PayPal	✓	
7/15/2011 10:26:13 AM	PayPal IPN Received	✓	PayPal: 5NE04674P5753525B
7/15/2011 10:26:14 AM	Email Sent	✓	Order Details Template

Configuring the Commerce Module

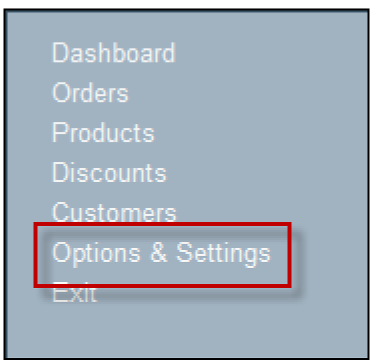
How to configure the Commerce module.



1. Select **Control Panel** from the module actions menu. Once you have entered the control panel, you will see the Dashboard.

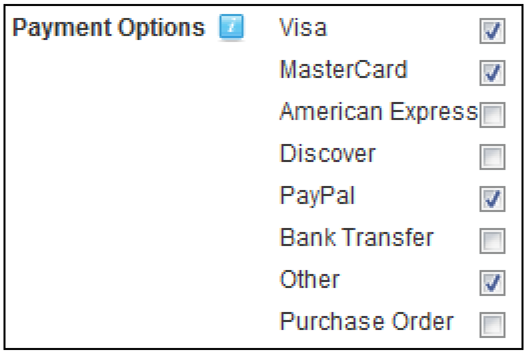


2. Select **Options & Settings** from the left hand panel.

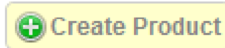


3. Click the **Payment Options** tab to configure the payment options.

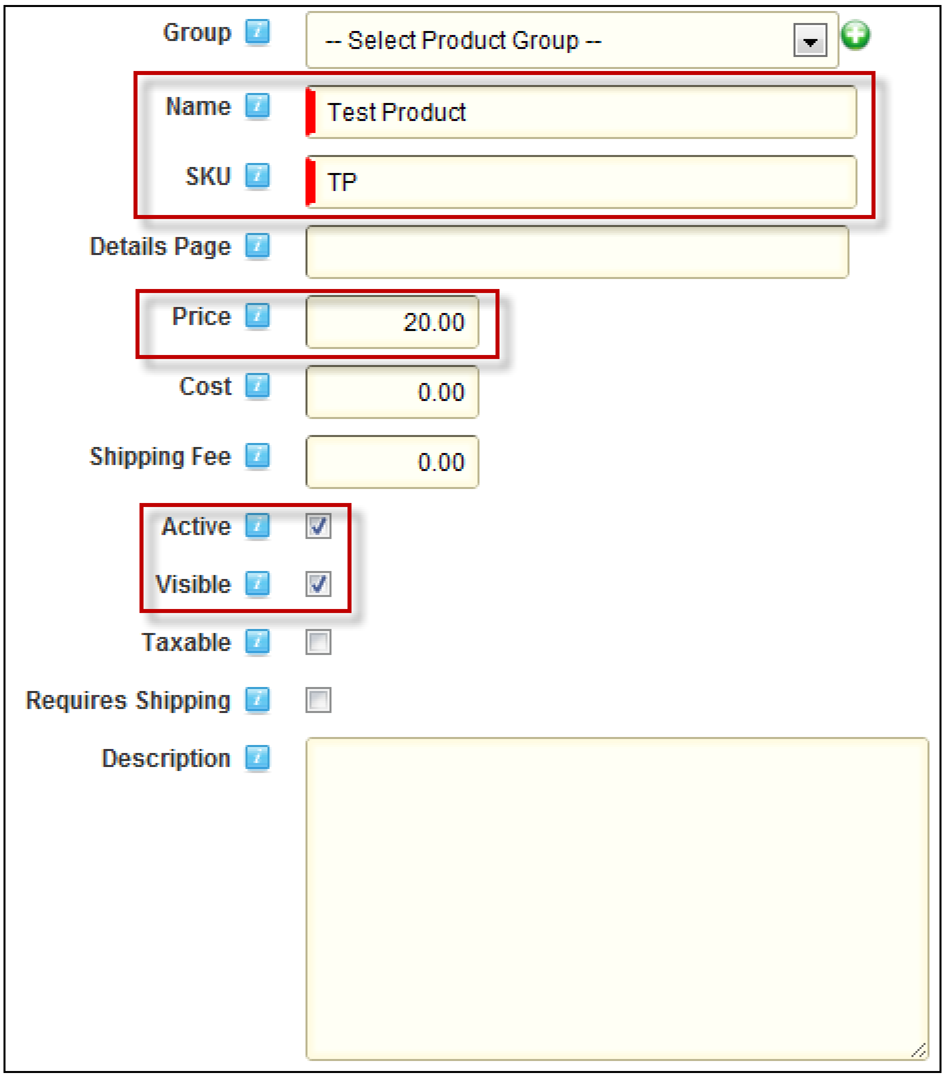
4. Mark the check box for to each payment type you want to enable. If you select one of the four credit card types, you will need to configure the Credit Card Payment Provider section below. If you select PayPal, you will need to complete the PayPal details section. If you select either **Bank Transfer**, **Other** and **Purchase Order** these options all require manual payment processing.



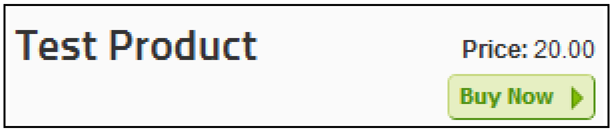
5. Go to the **Credit Card Payment Provider** section. By default the Assembly, Class and Payment URL fields are specific to authorize.net. You will need to enter the Login ID and Password/Key from your authorize.net account. If you are using a sandbox account, you will need to enable Test Mode and change the Payment URL to https://test.authorize.net/gateway/transact.dll
6. Go to the **PayPal Details** section.
    1. In the **Account ID** text box, enter your PayPal ID. This information will come directly from the PayPal website.
    2. In the **PayPal URL** text box, enter the PayPal URL you want to use for processing. This information will come directly from the PayPal website.
    3. In the **Language** text box, enter the two letter language code for the language to be used. The PayPal language codes are: Australian - **AU**, Chinese - **CN**, English - **EN**, French - **FR**, German - **DE**, Italian - **IT**, Japanese - **JP**, Spanish - **ES**, or United Kingdom **GB**.
7. Click the **Save** button to save these payment options. Now that you can process payments, you need something to sell.
8. Click the **Products** link on the left hand panel to open the Products page.

9. Click the **Create Product** 

button.
10. **Required.** In the **Name** text box, enter the name of your product.
11. **Required.** In the **SKU** text box, enter a Stock Keeping Unit which is a brief sequence of letters and numbers to help keep products unique and provide better reporting options.
12. **Recommended.** In the Price text box, enter a price for this product.
13. **Recommended.** At **Active**, mark the check box to set this product as available for purchase.
14. **Recommended.** At **Visible**, mark the check box to set this product as visible.



15. Click the **Save** button.
16. Click the **Exit** button in the left hand panel. You will now see the Product Display view. The module is ready to process purchases.



Tip: Clicking the **Buy Now** button will add a Test Product to the Shopping Cart and begin the purchase process.

Configuring Commerce Module Options

How to configure the payment options, tax rates, email addresses, shipping charges and other related options and settings for the Commerce module.

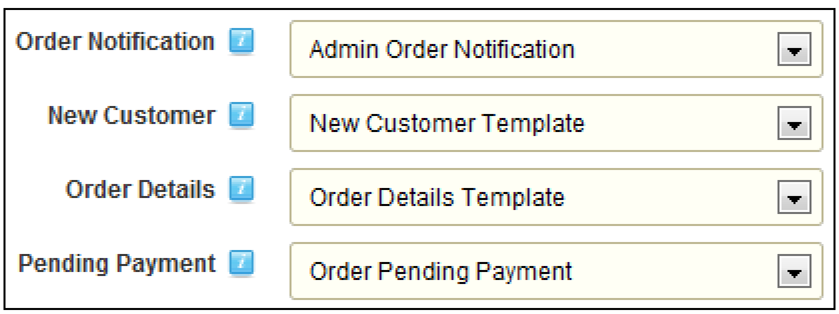
1. Select **Edit** > **Control Panel** from the module actions menu.
2. Select the **Options & Settings** tab from the right hand panel. This displays the four related tabs across the top of the Control Panel named General, Payment Options, Tax Rates, and Order Status Options. Here's an overview of each tab.

General Settings

Select the **General** tab to configure these settings:

- **Order Number**: The number of the most recent invoice. If no purchases have been made, any number entered will be the starting point for invoice numbers.
- **Store Email**: The email address that appears as the “From” address in outgoing email notifications.
- **Do you collect tax?**: Select **Yes** to add sales tax to purchases - OR - Select **No** if you don't collect tax.
- **Do you charge shipping?**: Select **Yes** to add a shipping fee for physical goods - OR - Select **No** if you don't charge shipping costs.
- **Theme**: Select a theme. Different themes affect the colors and styles of the Product Display view.
- **Order Sources**: Comma separated values are used to define all the possible sources of a sale.

- **Sales Reps**: Select a role that contains existing users. These users can be specified as the sales representatives for orders.
- **Date Format**: Select the preferred date format to be displayed on the module.
- **Time Format**: Select the preferred time format to be displayed on the module.
- **Default Country**: Select the default country to be used in the billing address.
- **Roles to Notify**: Select a role and then click the **Add Role** button. The members of the selected roles will receive an Order Notification email when a purchase is completed.
- **Email Templates**
  - **Order Notification**: Sent to administrators and other specified roles when a purchase is completed.
  - **New Customer**: Sent to new customers that register during the purchase process.
  - **Order Details**: Sent to a customer after they complete a purchase.
  - **Pending Payment**: Sent to a customer when the purchase has not been completed due to a pending payment.

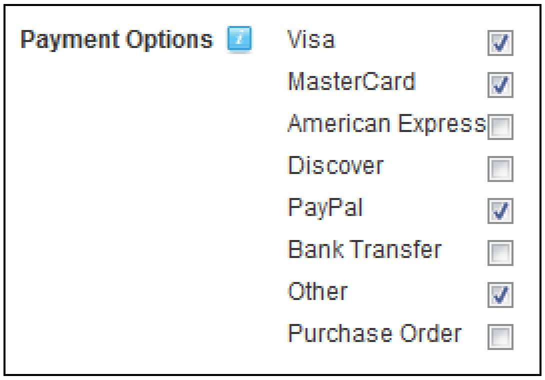


Payment Options

Select the **Payment Options** tab to configure these settings:

- **Payment Options Selection**: Select one or more payment options that will be available to customers during the purchase process.
  - **Visa**: A common Credit Card
  - **MasterCard**: A common Credit Card
  - **American Express**: A common Credit Card
  - **Discover**: A Common Credit Card
  - **PayPal**: A popular online payment processor. Selecting this option will route the customer to the PayPal website after the purchase. Additional configuration is described below.

    - **Bank Transfer**: Direct electronic funds transfer. This option will require manual interaction with the customer to get the details of the bank accounts.
    - **Other**: Any type of payment not listed. This could include a cash, check or money order payment. This type of payment requires manual interaction with the customer after the purchase has been completed.
    - **Purchase Order**: A purchase order is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services the seller will provide to the buyer.

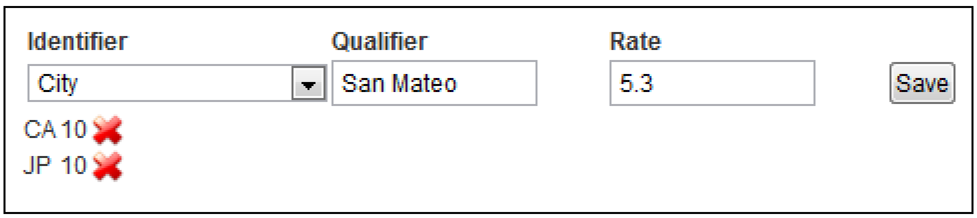


- **Enable SSL**: Selecting this option will ensure that purchases are processed using SSL.
- **Currency**: The currency type used for transactions. The four credit card options processed by the default Credit Card payment provider, authorize.net, will only process transactions using US Dollars. PayPal and the other manual options can use the other currencies.
- **Credit Card Payment Provider**: Information regarding the entity that will process credit card payments.
    - **Assembly Name**: Enter the name of the assembly that is located in your bin directory that will handle your payment processing.
    - **Class Name**: Enter the full name of the class that is within the assembly you specified above that will be used to process payments. The default class points to authorize.net.
    - **Login ID**: The ID used to authenticate with the payment provider.
    - **Transaction Key**: The unique key used to perform transactions. Provided by the payment processor.
    - **Test Mode**: Set the module into Test Mode, which will not process actual real money transactions.
    - **Payment URL**: The location of the payment provider gateway. By default it uses the authorize.net gateway.

- **PayPal Details**
  - **Account Id**: The email address associated with your PayPal store.
  - **PayPal URL**: The page that the customer will be directed to after the purchase is complete.
  - **Language**: The language desired for the PayPal page. The Language is to be entered using the PayPal language code. The PayPal language codes are: Australian - **AU**, Chinese - **CN**, English - **EN**, French - **FR**, German - **DE**, Italian - **IT**, Japanese - **JP**, Spanish - **ES**, or United Kingdom – **GB**.

Tax Rates

Select the **Tax Rates** tab to configure these settings:



- **Identifier**: Used to specify when a specific tax should be applied. If the customer resides in an identifier zone, the tax will be applied. Options include City, State, Postal Code, and Country.
- **Qualifier**: Used to list a specific instance of the identifier zone. When a customer enters a value found in the qualifier column for a matching identifier, the tax will be applied. The values for City, State and Postal Zone must be the full name of the zone (Example San Mateo, California, 94402) The Country qualifier uses the country code (Example US, CA and JP for United States, Canada and Japan) If multiple zones need to be taxed, multiple tax rate entries must be created for each specific zone.
- **Rate**: Enter the percentage value of the tax rate.
- **Tax Rate List**: A list of previously created tax rates. The qualifier and percent rate are displayed. Click the red X icon to delete a tax rate.

Order Status Options

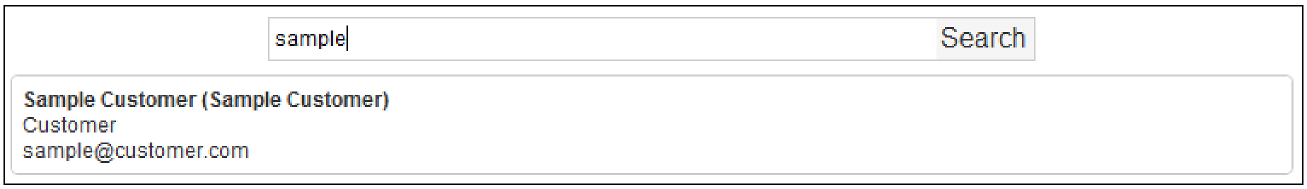
These options are potential statuses for a purchase completed by a customer. The default options available are: Complete, Pending Payment, Processing, Shipped, and Canceled.

Select the **Order Status Options** tab to configure these settings:

- **Edit**: Click the pencil and paper icon to change the name of an existing option.
- **Delete**: Click the red **X** to delete and existing option.
- **New**: Enter a name in the text box and then click **Save** to create a new option.

Commerce Customers

The Commerce Customers page allows you to browse for customers, and view their account and order information.



Customer List

After searching, a list of customers will be displayed here. Click on a single user to display additional details.

- **Search**: Enter the first few letters of a customer's first name, last name, username or display name. The results should be displayed instantly.

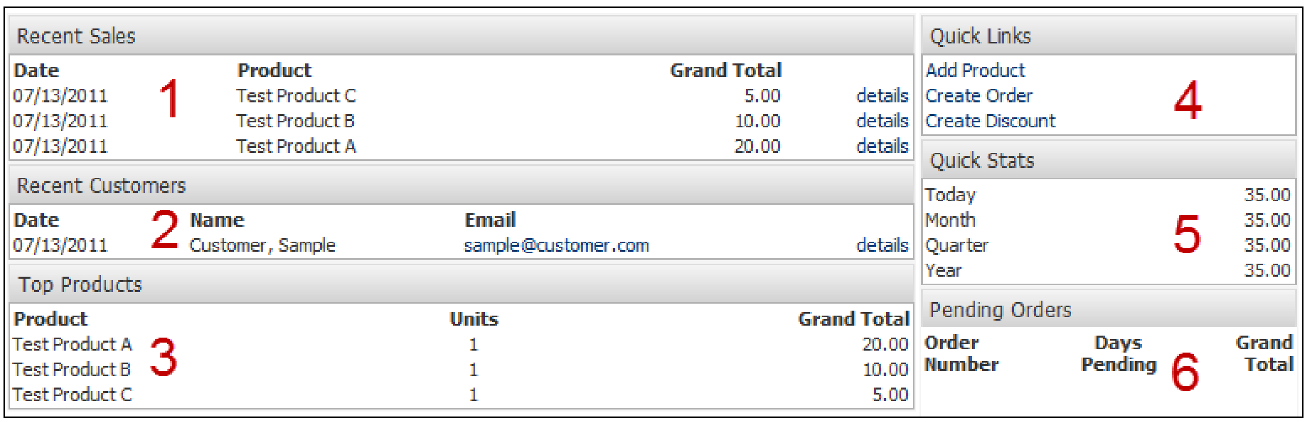
Customer Details: Clicking on the name of a customer will display their details. Clicking the Up or down arrows will collapse and expand the sections.

- **Personal Information**
  - **Name**: The customers first and last name.
  - **Display Name**: The customers DNN Display Name.
  - **User ID**: The customer's User Id. This is designated by DNN when the user registers and cannot be changed.
  - **Username**: The username the customer chose to represent them.
  - **Email**: The customers email address.
  - **Date Created**: The date the customer was recorded in the system.
- **Order History**
  - **Order Number**: The invoice numbers of the customer's previous purchases. Clicking an order number will display the order details.

    - **Date of Purchase**: The date the purchases were made.
    - **Grand Total**: The total amount they spent on the purchase.
- **Security Roles**: Roles are defined in DNN, and used to control and group users.
    - **Role Name**: The name of the role.
    - **Effective Date**: The date the user becomes a member of the role.
    - **Expiration Date**: The date when the user is no longer a member of the role.

Commerce Dashboard

The Dashboard section of the Commerce Control Panel provides a simple heads-up-display regarding the current status of Commerce. The dashboard is divided into the six sections described below.



1. **Recent Sales**: A snapshot of the most recent products sold processed by DNN Commerce, showing the most important information. This includes date, product name, grand total of the sale, and a link to the full details for each sale.
2. **Recent Customers**: Corresponding to the recent sales, this section displays information about the customers who made the most recent purchases. This information includes date, the customer's name, the customer's email and a link to the full customer details.
3. **Top Products**: This section is a running tally of the most successful products for the current month. This is based on the grand total of combined sales for each distinct product. The number of units sold for each product is also displayed.
4. **Quick Links**: This section allows the administrator to easily access some basic tasks in the control panel.
    - **Add Products**: opens the product creation page on the products section.

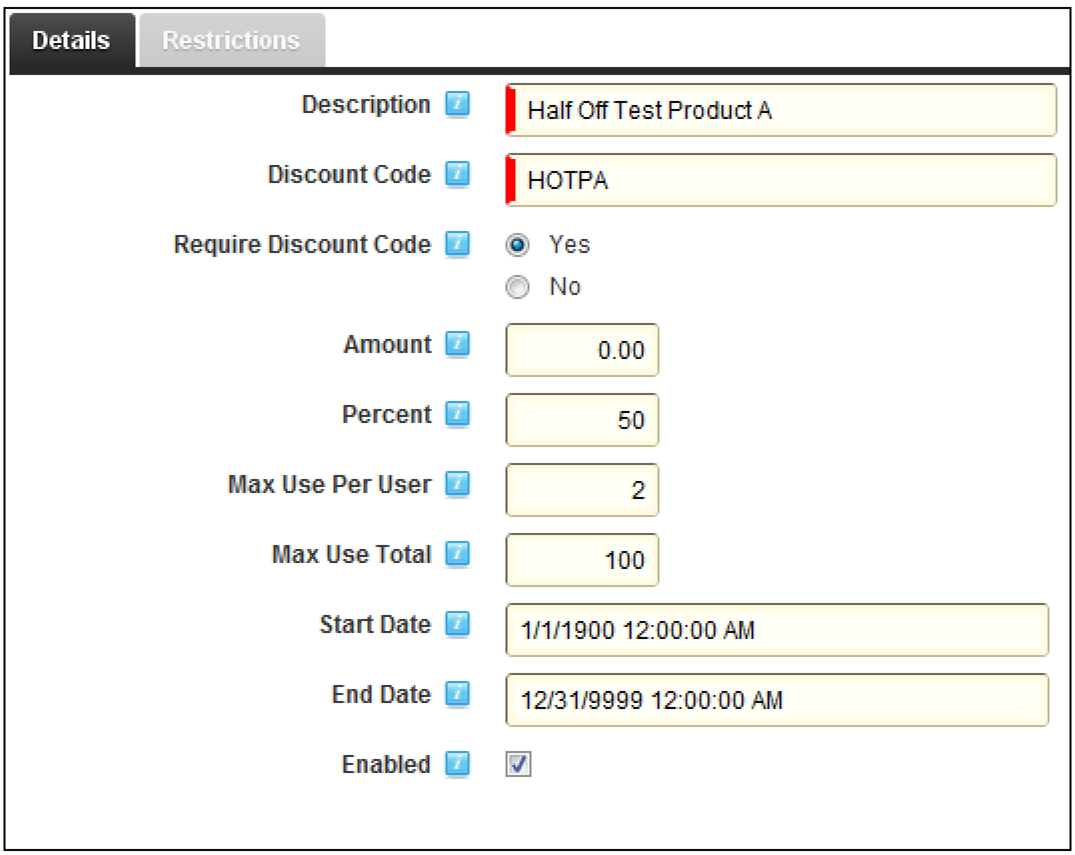
  - **Create Invoice**: opens the order creation page found on the Orders section.
  - **Create Discount**: opens the discount creation page found on the Discounts section.
5. **Quick Stats**: This section shows the total sales figures for the current day, month, quarter and year.
6. **Pending Orders**: This section displays orders that have been initiated but not completed. Purchases that have not received a payment are considered pending.

Commerce Discounts

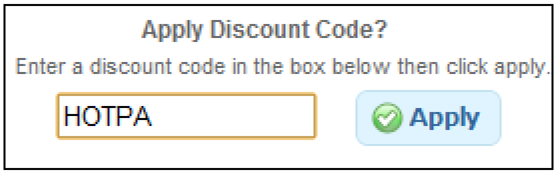
The Discounts section of the Commerce Control Panel includes two types of discounts. Coupon Codes can be applied during the purchase process to reduce the price of a product. Default Discounts are temporary price decreases that are automatically applied to specific products.

Create Discount: Clicking **Create Discount** will display an empty Discount Details page, enter all the information described below then click save.

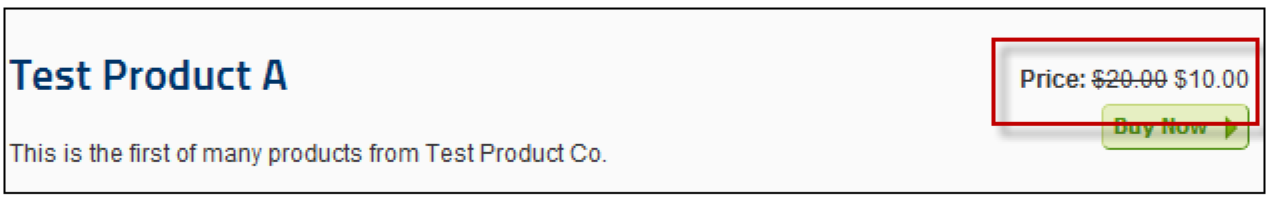
Discount Details: Clicking on a discount in the list will display the discount details.



- **Description**: A brief statement describing the discount.
- **Discount Code**: The alphanumeric code entered by the customer during the purchase process.
- **Require Discount Code**:
  - If **Yes** is selected, the discount will use a Coupon Code. The discount will not be applied until the customer enters the discount code in the box during checkout.

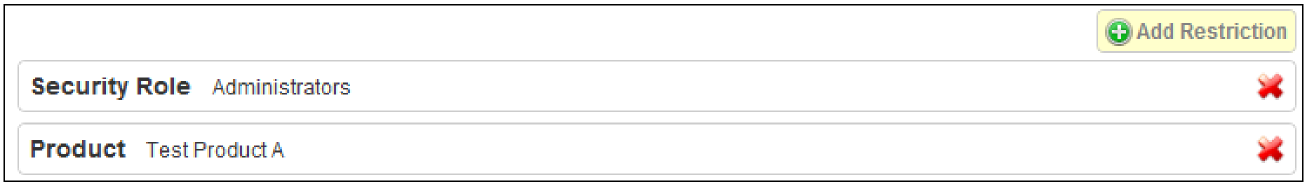


  - If **No** is selected, the discount will be a Default Discount. It will automatically reduce the price of applicable products. A Specific Product Discount Restriction must be added in order to activate a Default Discount.



- **Amount**: The static value of currency that should be discounted from the price. If you enter a value here, Percent should be 0 (zero).
- **Percent**: The percentage value that should be discounted from the price. If you enter a value here, Amount should be 0 (zero).
- **Max Use Per User**: Enter a number indicating how many times a particular customer can use the discount code.
- **Max Use Total**: Enter a number indicating how many times the discount code can be used by all customers combined.
- **Start Date**: The date when the discount becomes active.
- **End Date**: The date when the discount code will no longer work.
- **Enabled**: Discounts that are not enabled will not reduce the price of a product.

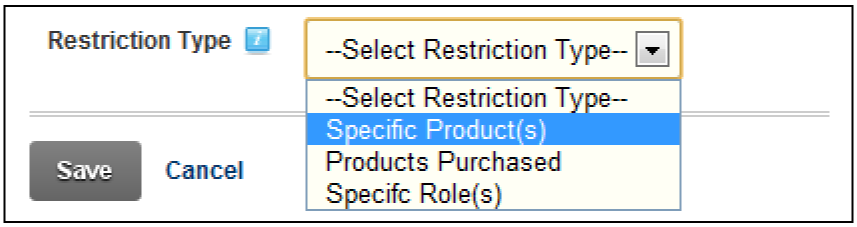
Discount Restrictions



Restriction List: Click the red X to delete a restriction.

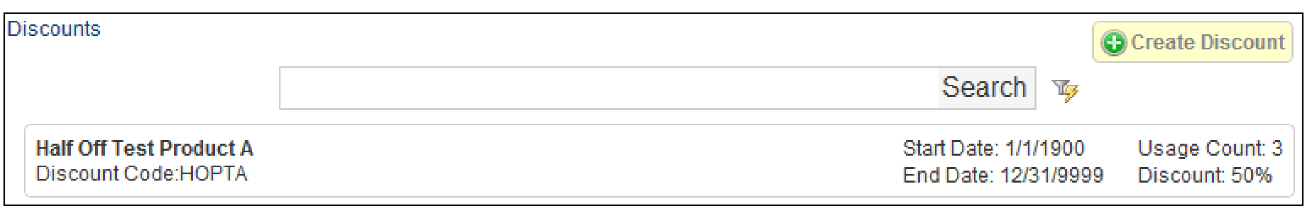
Add Restriction: Click the Add Restriction button to create a new discount restriction.

- **Restriction Type**: Select a type from the drop down list.



- **Specific Product(s)**: This restriction causes the discount to only be applied to a specified product. Select the name of an existing product. Multiple restrictions can be created to apply the discount to multiple products.
- **Products Purchased**: This restriction causes the discount to only be available to customers who have previously purchased a specified product. Select the name of an existing product from the drop down list. Enter a date range for qualifying purchases (MM/DD/YYYY or DD/MM/YYYY depending on locale). If a customer purchased the specified product in the time frame between the After date and the Before date, then they will be eligible for the discount.
- **Specific Role(s)**: This restriction causes the discount to only be available to members of the specified role. Select a role from the drop down list.

Discount List: A list of available discounts.



- **Search**: Enter the name or code of a discount to filter the list. Click on a single discount to view the details, and to enable/disable it.

- **Search Options**:
  - **Active Only**: Only display Active Discounts
  - **Sort Column**: Change how the discounts are sorted.
  - **Sort Order**: Change the direction of the sorted list.
  - **Rows**: Specify how many rows to display.

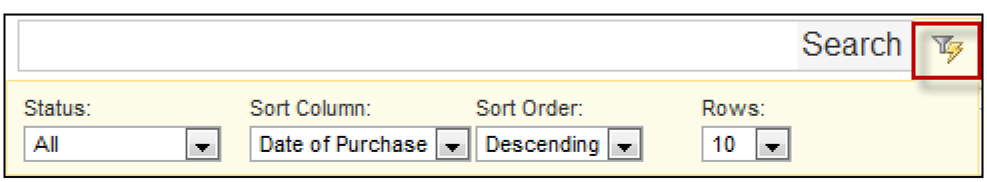
Commerce Orders

The Orders section of the Commerce Control Panel provides a comprehensive list of all the order processed by DNN Commerce.

Order List: The order list shows the most recent orders processed by DNN Commerce. Each grey box is a single order with an invoice number, customer name, time and date of purchase, grand total and payment status indicator. Clicking on a single order will expand that order's details.

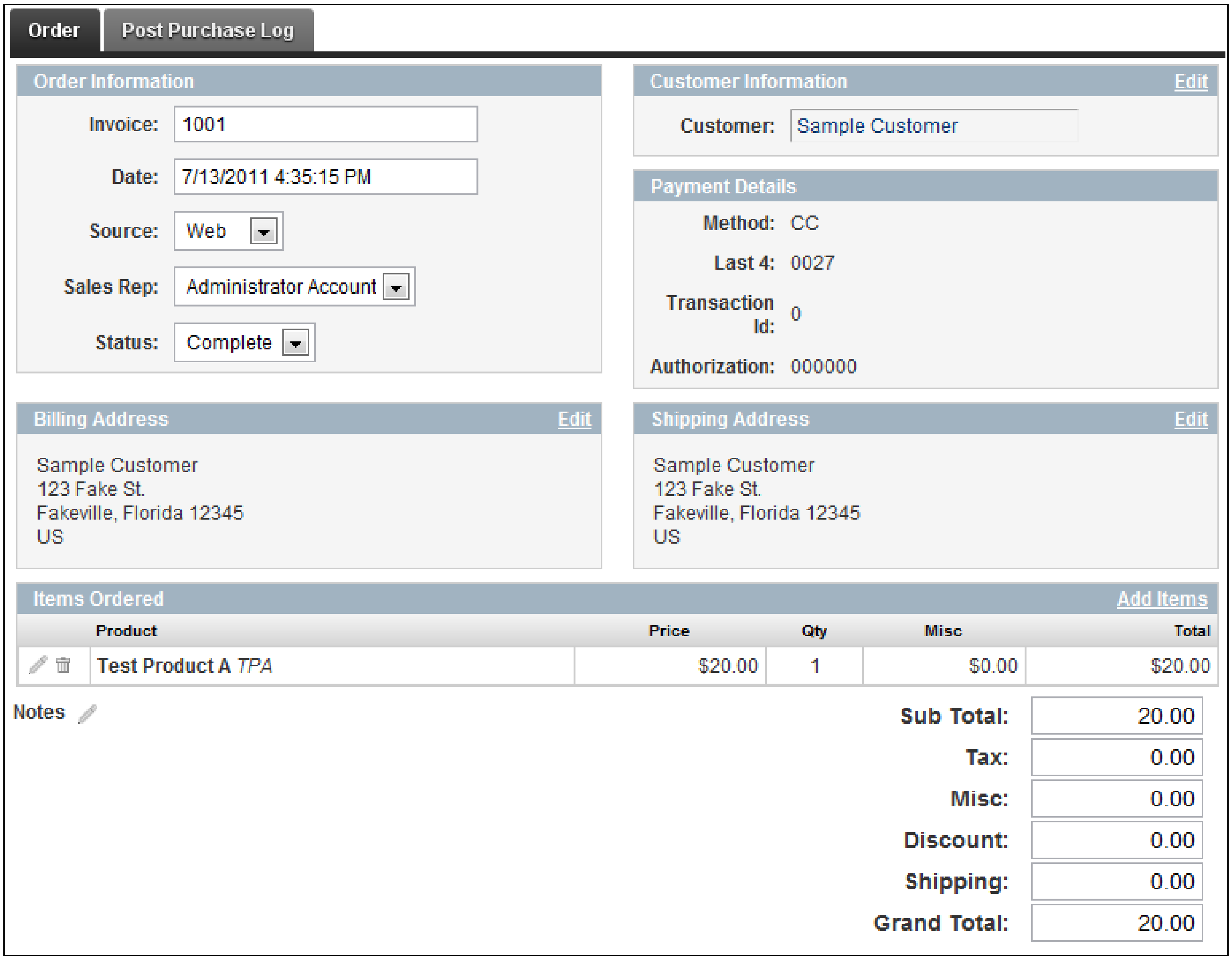
Search: The search box allows you to enter a customer name, order number, or grand total amount to filter the list. The order list will instantly display the filtered results of your search as you type.

Search Options: Clicking the small lightning bolt icon to the right of the Search button will expand the search options.



- **Status** Choose to display only paid or only not-paid orders.
- **Sort Column**: Change which value is used to sort the list.
- **Sort Order**: Change the direction that the list is displayed.
- **Rows**: Select how many rows to display at once.

Order Details: Clicking on a single order in the list will display the order's details. A single order has many details associated with it.



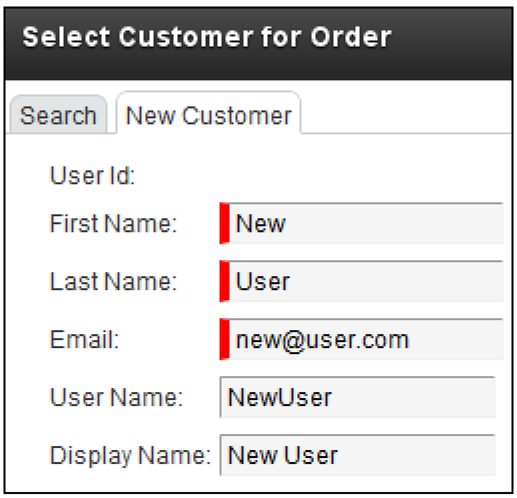
Order Information

- **Invoice**: The invoice number for the purchase. This value is unique per purchase and can be used to track specific orders.

- **Date**: The date and time of the purchase.
- **Source**: The channel used to process the sale. (Example: Phone, web, email, other)
- **Sales Rep**: An optional detail, clicking the down-arrow will show a list of available sales reps. Select one to designate that user as the sales representative responsible for the current order.
- **Status**: An optional detail, clicking the down arrow will show a list of available statuses.

Customer Information

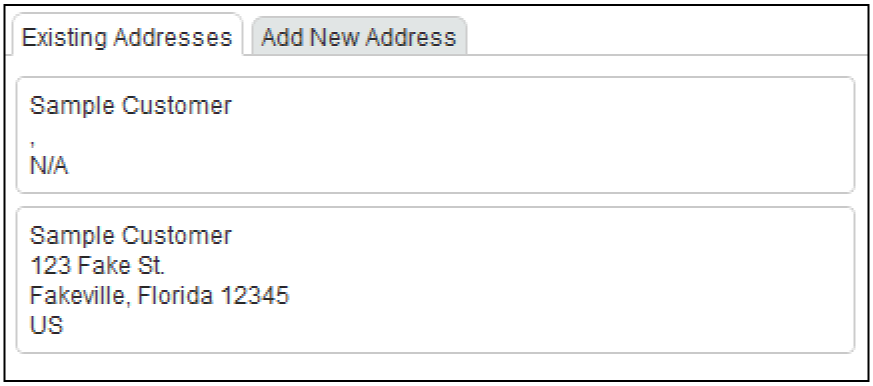
- Clicking on the name will lead to the customer's details view.
- Clicking edit will display a screen used to select a customer to associate with the purchase.
- If the customer does not exist as a DNN user, the New Customer tab can be used to create a new user to attach to the order.



Payment Details: A brief description of the payment information for the order.

- **Method**: The type of currency used. Credit Card, PayPal, Other, etc.
- **Last 4**: If a credit card was used, this will show the last four digits of the credit card number
- **Transaction ID**: The transaction ID for the purchase.
- **Authorization**: The authorization code from the payment processor.

Billing Address: The billing address for the customer. Clicking the pencil will display the currently available addresses, and the option to add a new address.

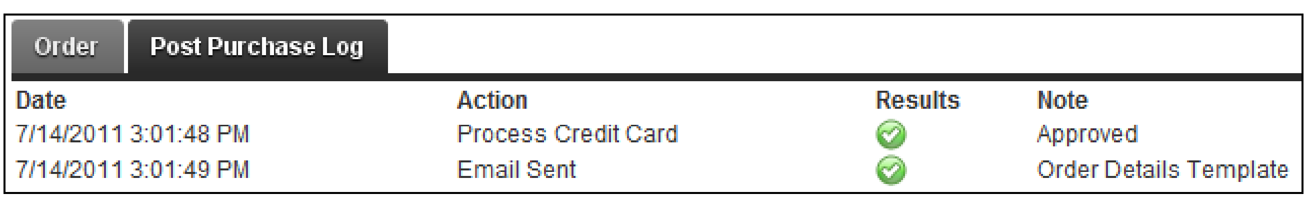


Shipping Address: The shipping address for the customer. This might be the same as the billing address. Clicking the pencil will display the currently available addresses, and the option to add a new address.

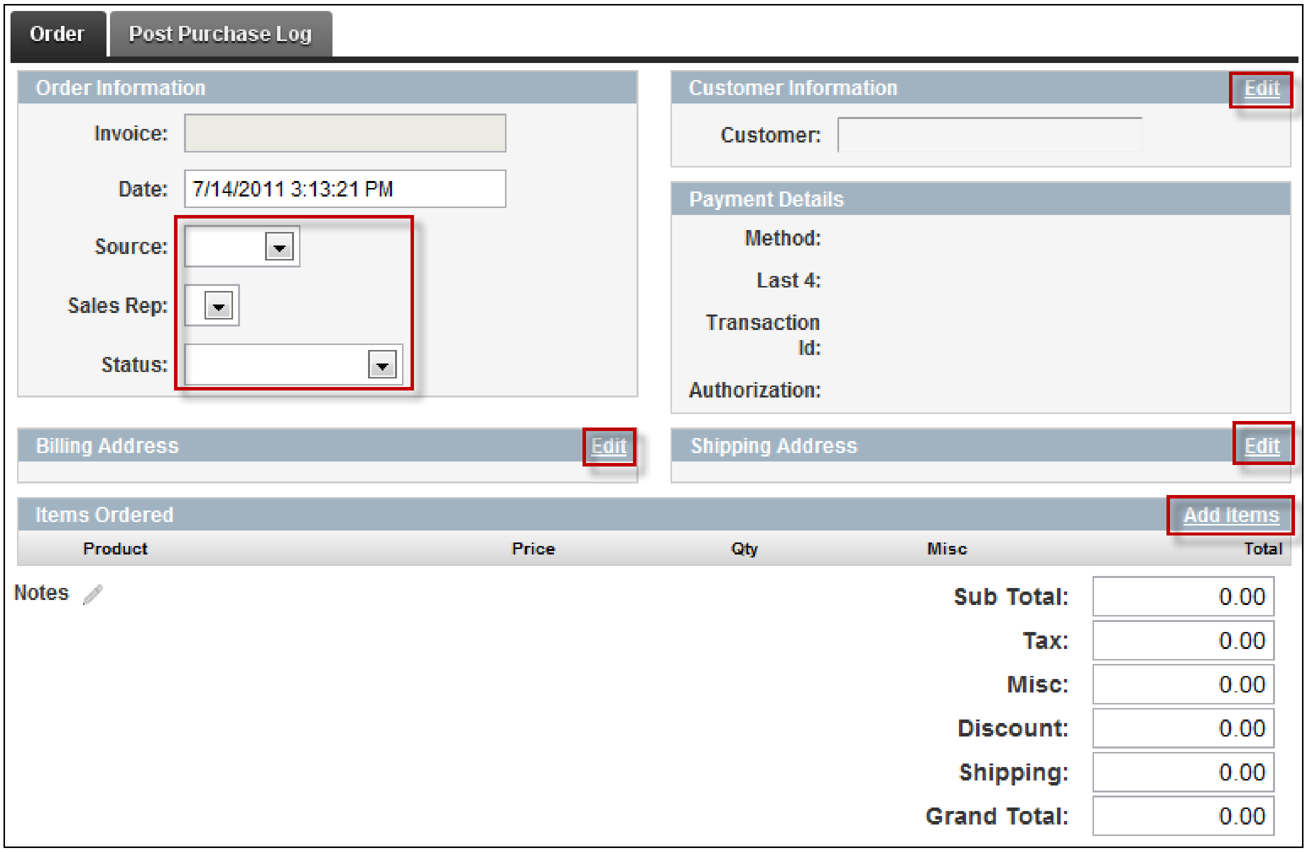
Items Ordered List: Below the header is a list of the products included in the current order. Listed here is the name of the product, per unit price, quantity purchased, miscellaneous fees and the total price per product.

- Clicking the pencil will display the Order Item Details which is used to modify properties of the product in the order. The properties are the same as those listed in the product list, with the addition of a notes field.
- Clicking the trash can icon will delete a product from the order.
- Clicking Add Items will display the Order Item Details. Selecting a product that does not currently exist in the order will add it.

Post Purchase Log: The post purchase log is a list of the actions taken by Commerce after a customer completes a purchase. If one of these actions fails it will have a red X icon instead of the green check mark. The information displayed includes the timestamp of when the action occurred, the type of action, if it was successful or failed, and any additional information regarding the action. The note field will show error codes from the payment processors, which email template was sent and other specific codes.

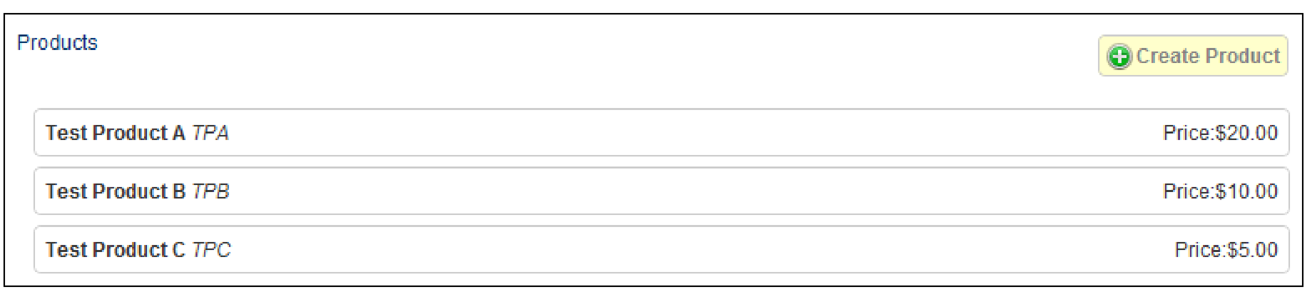


Create Order: Clicking the **Create Order** button on the order list will display a blank Order Details page. When creating an order it is important to complete as many fields as possible. The various Edit buttons and Add Items button, in addition to the drop down lists are used to add content.



Commerce Products

The Products section of the Commerce Control Panel provides a comprehensive list of all the order processed by DNN Commerce. The Products page allows you to view all existing products, the individual product details, and create new products.



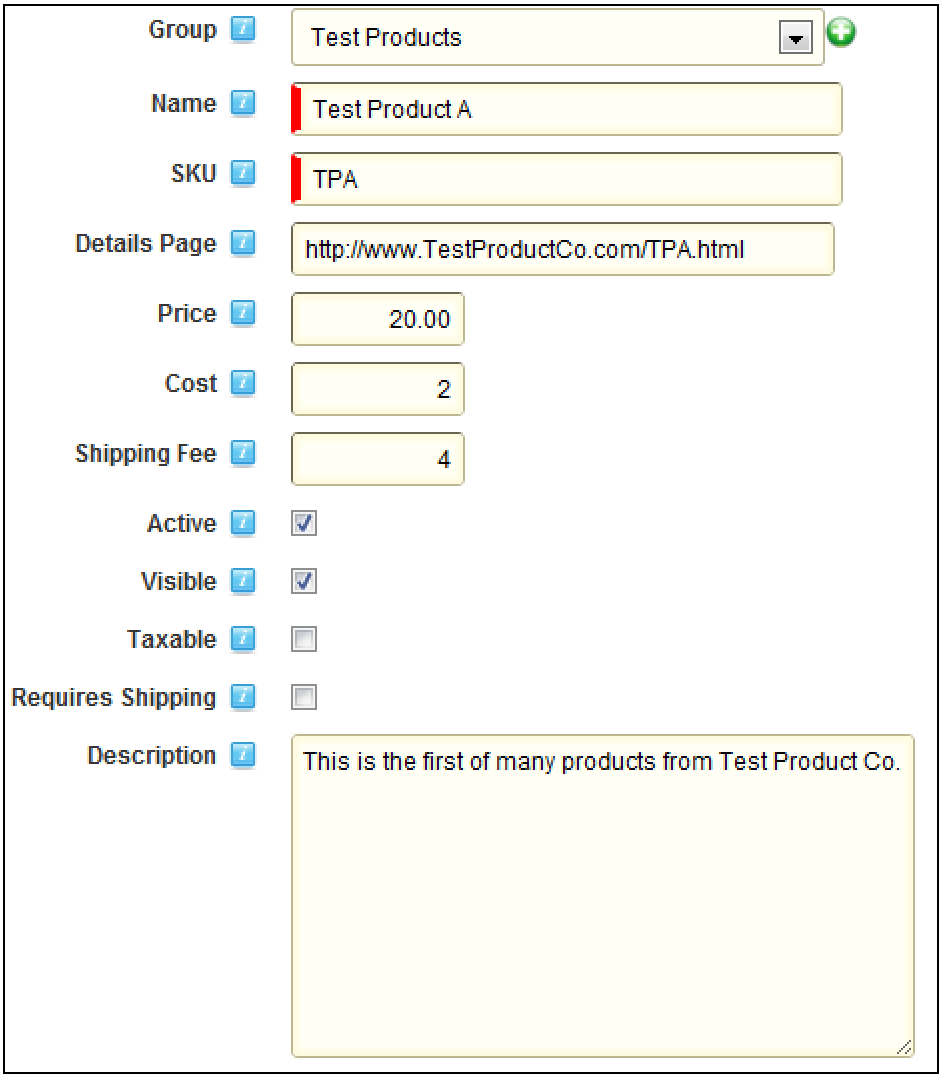
Product List: The products page displays a list of all the available products. Clicking on an individual product will display the product details.

To reorder products, simply click on the product to be moved and then drag it to the new location.

Create Product: Clicking the **Create Product** button will display a blank Product Details page, where the information about the new product is entered. Click Save when all relevant information is entered.

Product Details

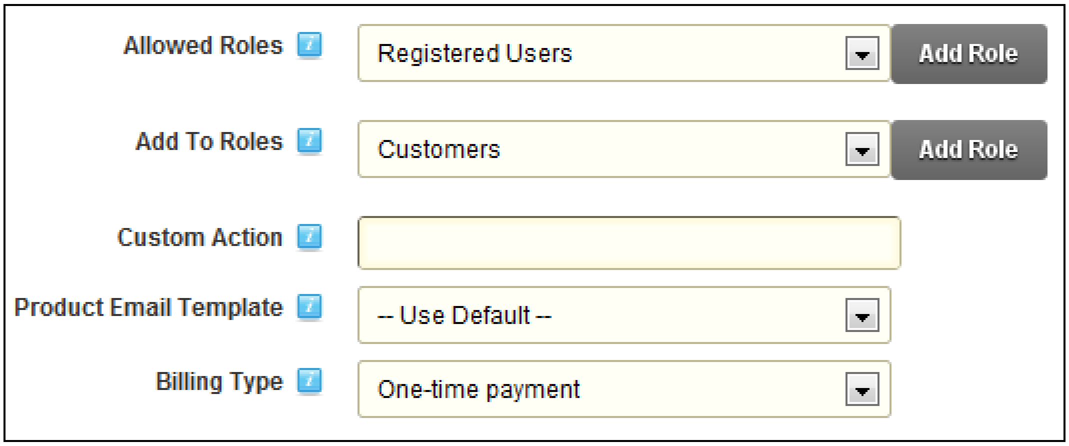
- **Group**: Available product groups are in the drop down list. If there are none available, clicking the green + icon will display the Edit Product Group window. Product groups are used to categorize similar products. The name of any product group that currently has products assigned to it will be visible to customers on the Product Display view.
  - **Edit Product Group**: Enter the name for the new product group and then click the **Save** button.
- **Name**: The name of the product. The text you enter here will be displayed in large bold letters on the Product Display view, so entering a clear, concise title is appropriate.
- **SKU**: A SKU (Stock Keeping Unit) is a short, simple, unique alphanumeric code used to keep track of different products. The SKU must contain only letter and numbers.
- **Details Page**: Enter a URL, including the protocol (http://), that contains more information about the product. The product name on the Product Display view will become a hyperlink that directs the customer to the URL.
- **Price**: The amount that you wish to charge customers who purchase the product.
- **Cost**: The amount that it cost to produce the product.
- **Shipping Fee**: The amount that it costs to ship the item.
- **Active**: Enabled or disable the product. Disabled products cannot be sold.
- **Visible**: Toggle whether the product will be displayed on the Product Display view or hidden. A product can be active, but not visible. In that situation, an alternative method such as a direct link or a custom action must be used to allow customers to purchase the product.
- **Taxable**: Toggle whether the product requires a sales tax applied to it.
- **Requires Shipping**: Toggle whether or not the product will need to be physically shipped. (As opposed to electronic distribution.)
- **Description**: A short summary of the products features. This text will be shown on the Product Display view below the name of the product.



Product Options

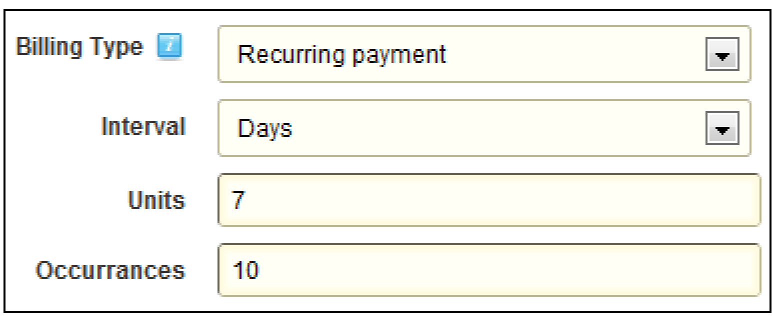
- **Allowed Roles**: Select a role from the drop down list then click Add Role. Any role that is added will be able to purchase the item. If no roles are added, it will be available to any user with permission to view the Product Display view.
- **Add To Roles**: Select a role from the drop down list then click Add Role. When a customer purchases the product, the customer will be added to any DNN role added here.
- **Custom Action**: Enter the class name and assembly that contains instructions to carry out custom actions after a customer completes a purchase.

- **Product Email Template**: Select an email template that will be sent when a customer purchases the product. By default the email template should be Order Shipment Notification.



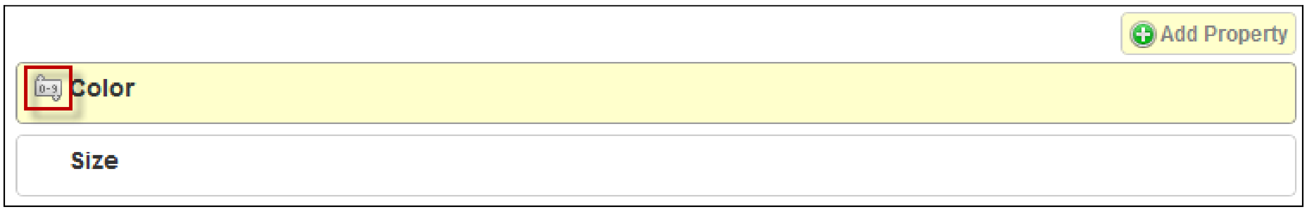
Billing Type

- **One-time Payment**: A typical situation where a customer pays once, then receives the product.
- **Recurring Payment**: Used for subscriptions or products that require multiple payments from the customer.
  - **Interval**: Select Days if you want the payment to occur after a specific number of days have passed. Select Months if you want the payment to occur after a specific number of months have passed, on the same day of the month as the initial purchase.
  - **Units**: The specific length of the interval. Enter a value between 7 and 365.
  - **Occurrences**: The number of times a customer is to be billed, not including the initial purchase. Enter a number between 1 and 9999.



Note: The interval, units and occurrences work together to control the schedule of recurring payments. Example: If the values of 7 Units and 10 occurrences is entered for days, then the customer will be billed every 7 days, starting 7 days after the initial purchase, until a total of 10 additional periodic payments are made.

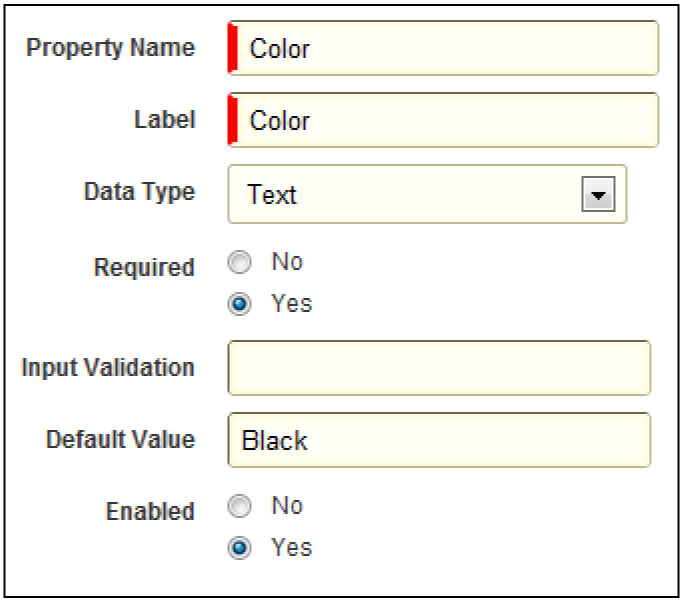
Properties: Product properties are descriptive attributes, used to capture values from the customers. Product properties are defined in the control panel, and then displayed during the purchase process. An example of a product property when selling a product: The property could be "Size", and during the purchase process, the customer selects the value "Medium" from a list of "Small" , "Medium" and "Large".



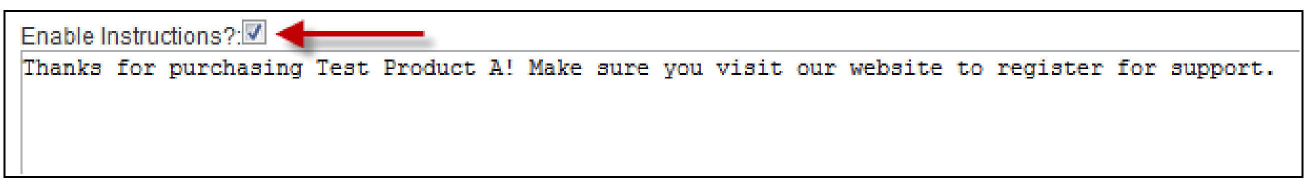
Property List: A list of existing properties for the product. Clicking the name of a property will display the Property Editor. Click and drag the small 0-9 icon to change the order of the list.

- **Add Property**: Clicking the Add Property button will display the Property Editor.
  - **Property Name**: A short name for the product property.
  - **Label**: The localized value that will be displayed to the customer during the purchase process. It may be the same value as the property name.
  - **Data Type**:
    - **Text**: Used for a product property where the customer enters a text value. Useful for less specific properties. Example: Custom inscription on the product.
    - **List**: Used when there is a distinct number of possible values and you only want the customer to select one. Example: Size (values: Small, Medium, Large)
      - **List Name**: Select a site specific list created previously. View the FAQs section for information on creating site specific lists.
  - **Required**: Choose whether or not the product property requires a value before the purchase can be completed.
  - **Input Validation**: Use a REGEX value to control the values that are entered by the customer.

    - **Default Value**: The value that will be entered into the property by default. The customer can delete or change the value during the purchase process.
    - **Enabled**: Select No if you wish to hide the Profile Property from the customer during the purchase process.

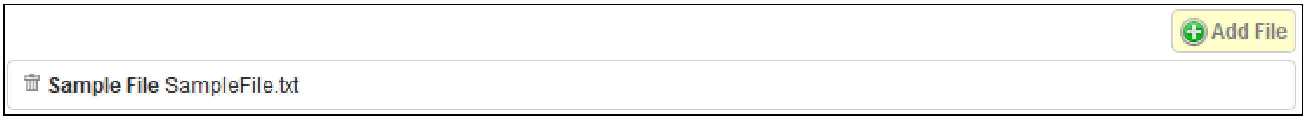


- **Special Instructions**: If enabled, these instructions will be displayed after the customer completes their purchase. Instructions such as where to download files, where to get support, or where to register would be common here.



- **Downloads**: These files are available to the customer after they complete their purchase.
    - **File List**: Files that have been previously uploaded are listed here. Clicking the small trash can icon will delete the file.
    - **Add File**: Clicking Add File will display the Upload File interface.
        - **Title**: Enter the name of the file. This name will be displayed to customers who purchase the product.

- **Date of Purchase**: The file will only be available for download to customers who purchase after this date.
- **File**: Use the file browser to select the file to upload. Click Upload File when finished.

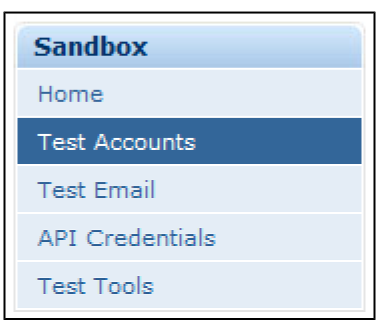


Creating a PayPal Test Account

How to create a PayPal test account and set it up for the Commerce module.

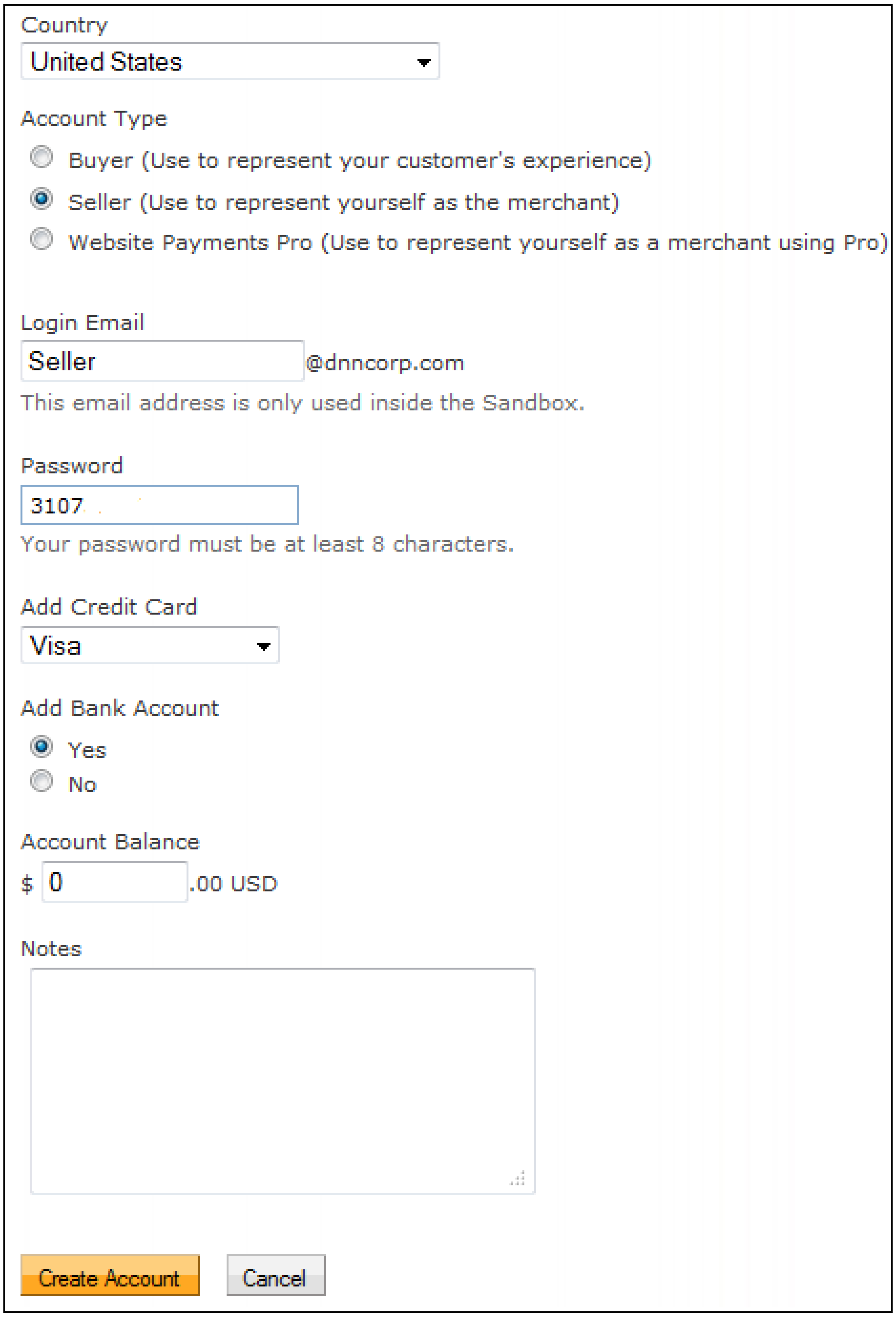
1. Navigate to https://developer.paypal.com/
2. Click the orange **Sign Up Now** button.

3. Complete the required fields. You should use a valid email address, but not one associated with a live PayPal account. Click Agree and Submit when finished.
4. PayPal will send an email to you. Locate the email and click the link to verify your email address.
5. Login with the new account.
6. Click **Test Accounts**.

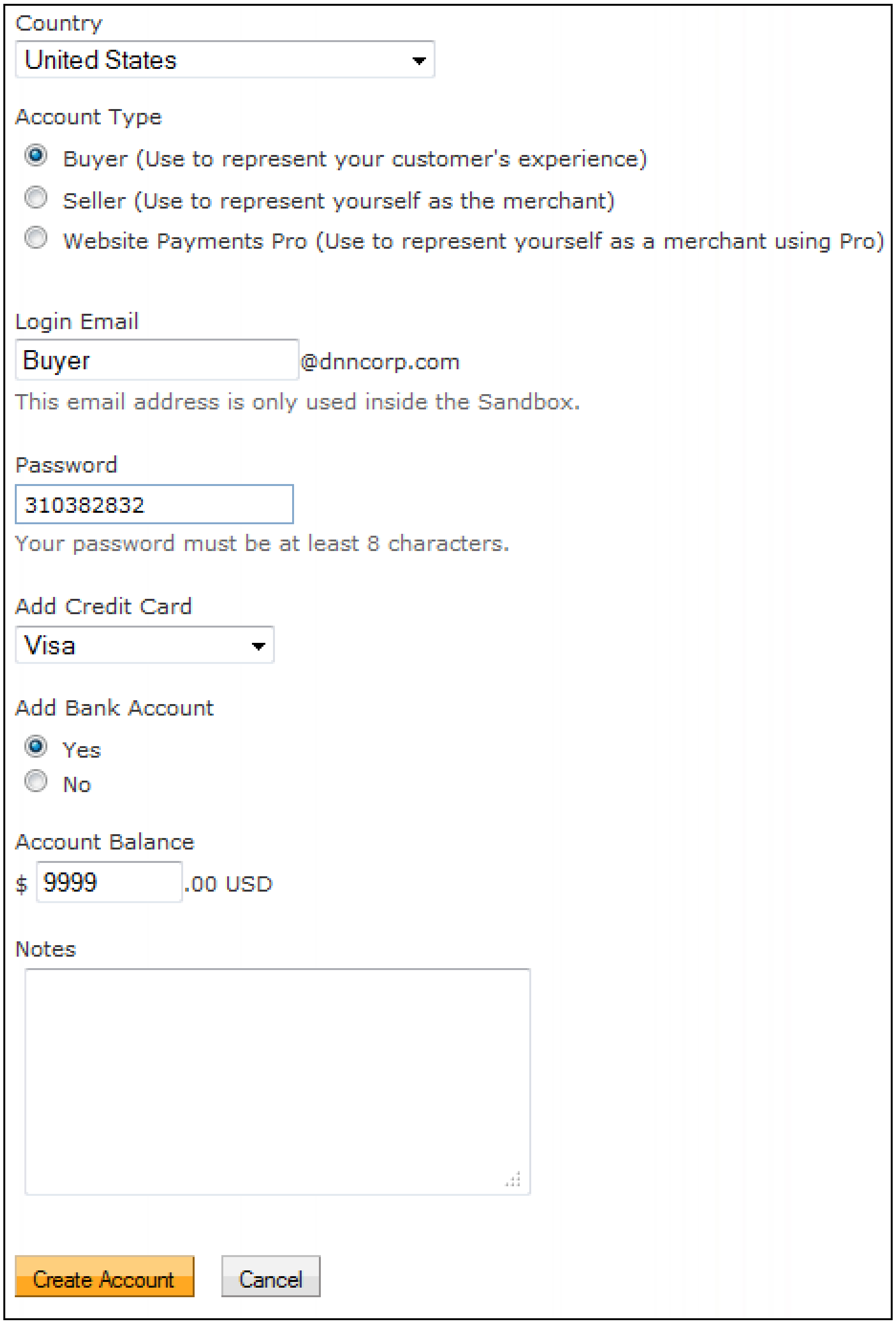


7. Click New Test Account: Preconfigured

8. Set the Account Type to **Seller**. The email address is only used in the sandbox test area, so choose something you will remember. The password will probably change when you reset the test account later, so write this down. Add a bank account and a credit card, to make sure the account is "verified".

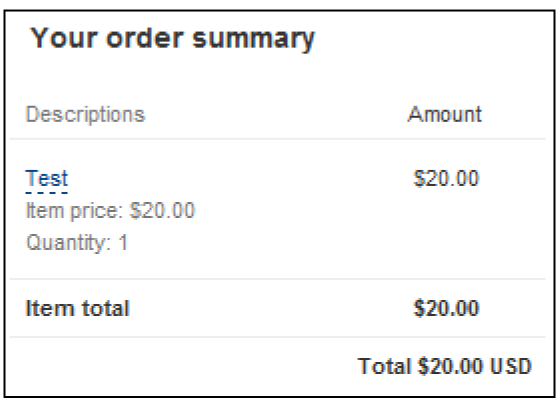


9. Click **Create Account**. After the system finishes creating the account, click Preconfigured again.
10. This time you will configure the Buyer account. The email address should be different, and the account balance should not be zero.



11. You should now see the two accounts listed. If at any point you need to create a new password, or change the account balance, click the Reset link next to the appropriate account.

12. Copy the email address for the buyer account. It is likely that PayPal added a bunch of numbers and _biz to the address.
13. In another browser tab, navigate to the Commerce control panel > Options & Settings > Payment Options tab.
14. Paste the seller test account email address in the Account Id box in the PayPal Details section.
15. Back on the PayPal site, select the radio button next to the buyer account and then click the Enter Sandbox Test Site button.
16. Copy the URL then paste it in the PayPal URL box in the Commerce control panel.
17. Close the Sandbox Test Site window, but do not logout of the Sandbox account. You will need to remain logged in to https://developer.paypal.com/ while doing any PayPal testing.
18. Enter a value in the Language box in the Commerce control panel. The Language is to be entered using the PayPal language code. The PayPal language codes are: Australian - **AU**, Chinese - **CN**, English - **EN**, French - **FR**, German - **DE**, Italian - **IT**, Japanese - **JP**, Spanish - **ES**, or United Kingdom **GB**.
19. Confirm that PayPal is selected as one of the Payment Options then click Save in the control panel.
20. Exit the control panel, and begin a new purchase. At the Review & Payment step, select PayPal from the drop down list. Click Process My Order.
21. You will be redirected to the PayPal Sandbox Test Site. The details of the purchase should be visible on the left side of the screen.



22. Click the Have A PayPal Account? link and then log in using the Buyer test account email and password.
23. Click the **Pay Now** button.
24. Click Return to [Your Name's] Test Store.
25. You should now see the usual Order Completed step in Commerce.
26. Enter the control panel, go to the Orders page, and confirm that the order processed correctly.

27. Viewing the Order Details > Post Purchase Log will show information about the transaction. There should be an IPN Received entry if it processed correctly.

Date	Action	Results	Note
7/15/2011 10:21:12 AM	Send User to PayPal	✓	
7/15/2011 10:26:13 AM	PayPal IPN Received	✓	PayPal: 5NE04674P5753525B
7/15/2011 10:26:14 AM	Email Sent	✓	Order Details Template

Purchasing a Product

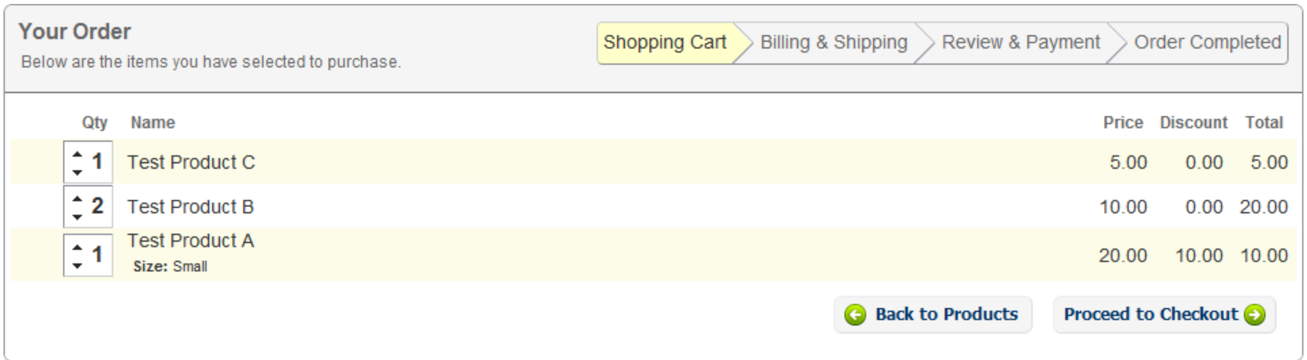
An overview of the functionally available when purchasing a product and the purchasing process using the Commerce module.

Product Display

An overview of the details displayed for each product and how to select a product to purchase.

- **Product Group**: Large bold letters display the name of the product group.
- **Name**: The name of the product.
- **Page Link**: Clicking on the name of a product will lead to the details page. If a details page was not entered when the product was created, the product name will not be a hyperlink.
- **Description**: A short description of the product.
- **Price**: The amount the customer has to pay. This value may be temporarily reduced with discounts.
- **Buy Now**: Clicking this button will add the product to the shopping cart. Note: After clicking **Buy Now**, the customer will need to enter values for any required product properties.

Shopping Cart

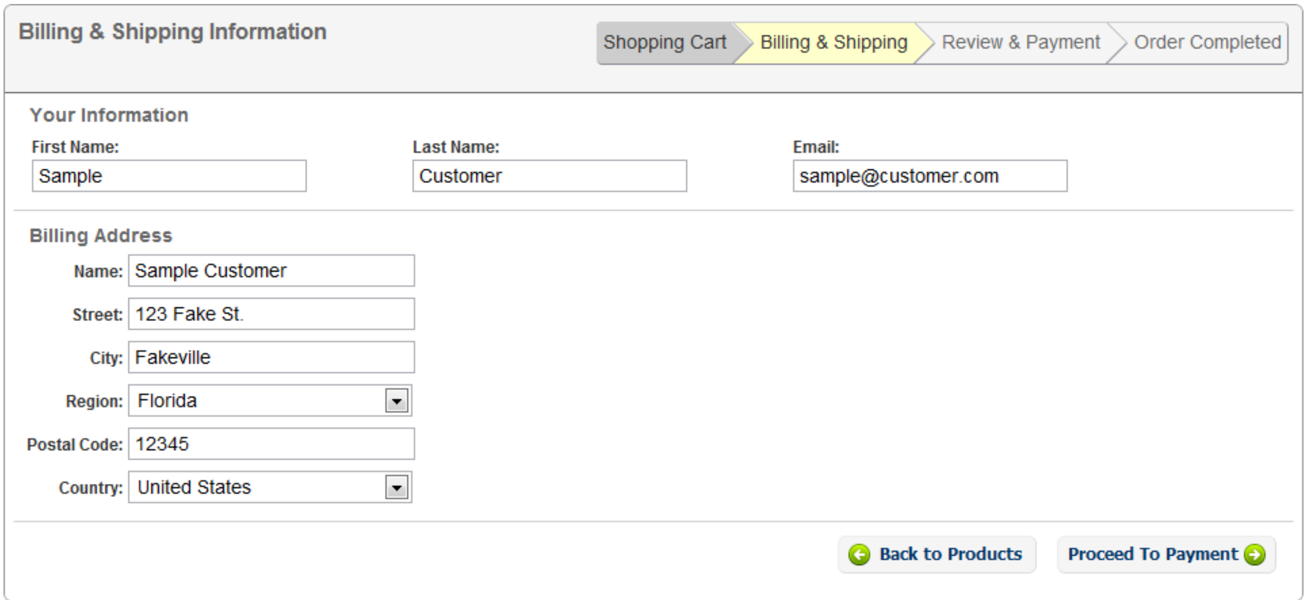


- **Delete**: Hovering over a product will cause a small gray X icon to display. Clicking the icon will remove the product from the shopping cart.

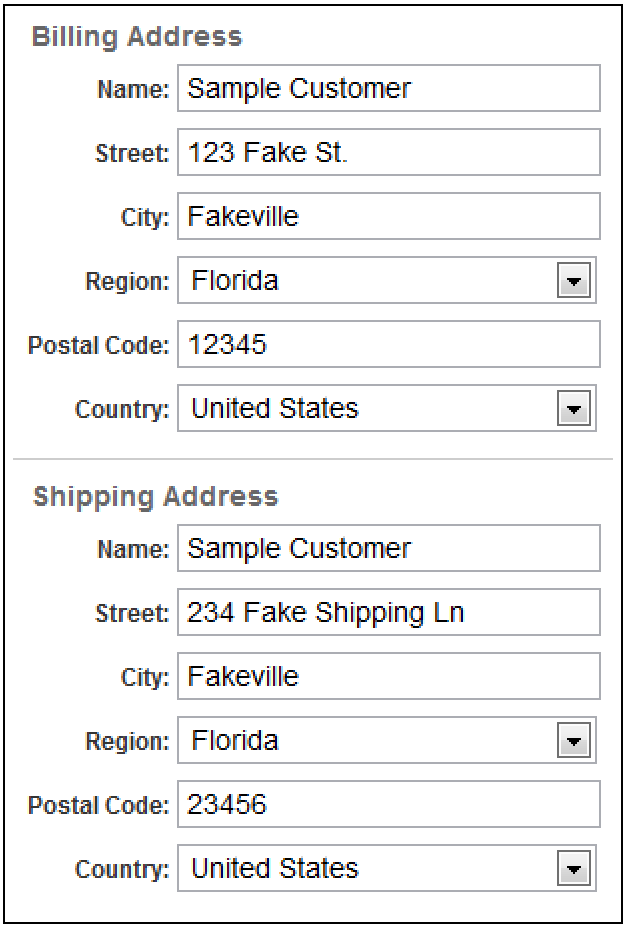
- **Qty**: The quantity of the product being purchased. The number can be adjusted by clicking the up and down arrows, after the product has been added to the cart.
- **Name**: The name of the product.
  - **Properties**: The values entered for the product's properties will be displayed below the name.
- **Price**: The price of an individual product.
- **Discount**: Any discount that is automatically applied to the product price.
- **Total**: Total price of the product (Price X Qty)
- **Back to Products**: Clicking this button will return the customer to the Product Display view.
- **Proceed to Checkout**: Clicking this button will continue the purchase process.

Billing and Shipping

An overview of the Billing and Shipping page and how to complete the required fields:



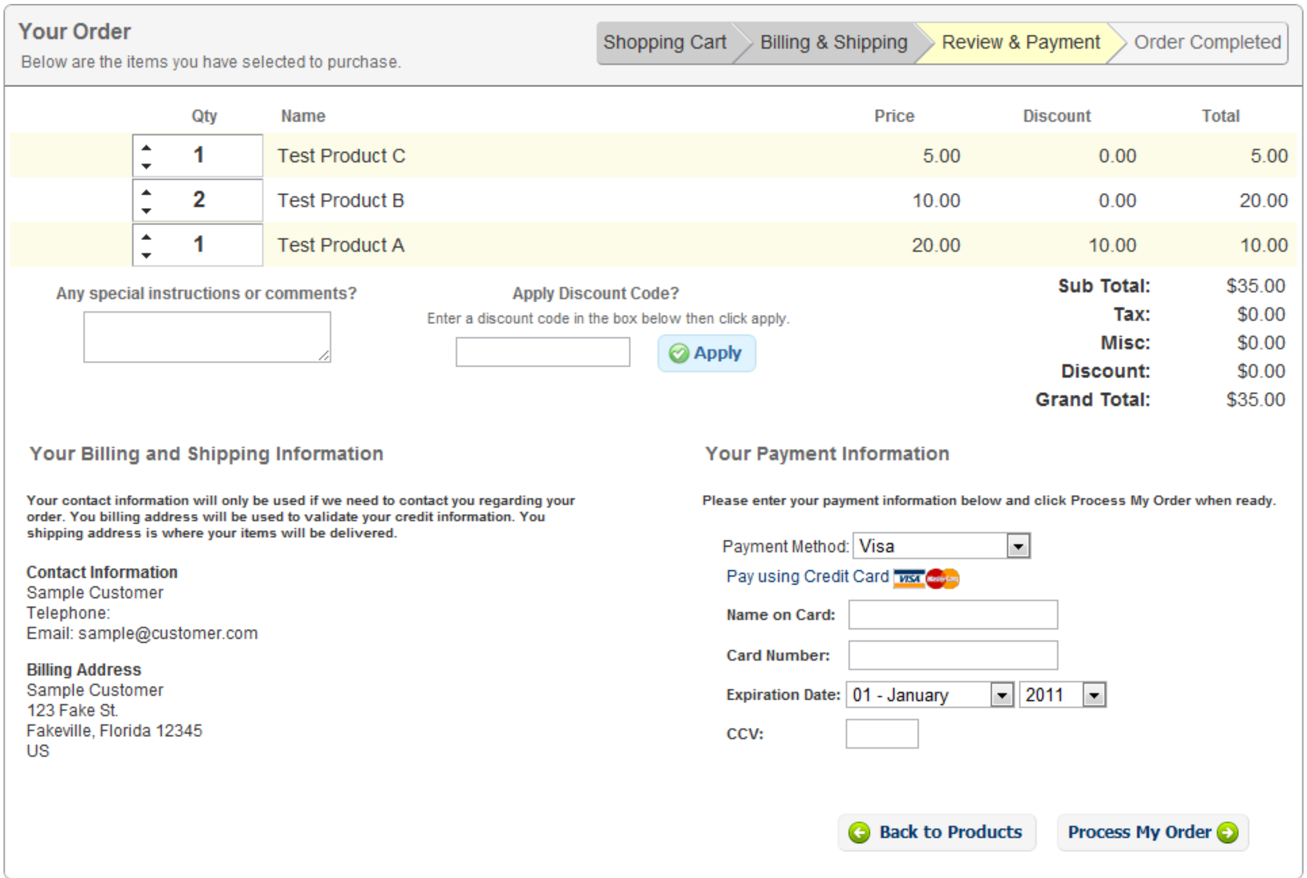
- **Your Information**:
  - **First Name**: Entered by the customer.
  - **Last Name**: Entered by the customer.
  - **Email**: The customers email.
- **Billing Address**: This will usually need to be the address on file with the customer's credit card company.
  - **Name**: Enter the full name.
  - **Street**: This must include the numerical address.
  - **City**: The city where the customer resides.
  - **Region**: This may be a state, or other region. The values in the drop down list will depend on the county selected below.
  - **Postal Code**: Also known as Zip code.
  - **Country**: Select your country from the drop down list.
- **Shipping Address**: An alternate address can be supplied if the product requires shipping. If this is left blank it will use the same address as the Billing Address. This will only appear if the product requires shipping, and shipping is also enabled in the Options and Settings.



- **Back to Products**: Clicking this button will return to the Product Display view.
- **Proceed to Payment**: Clicking this button will continue the purchase process.

Review and Payment

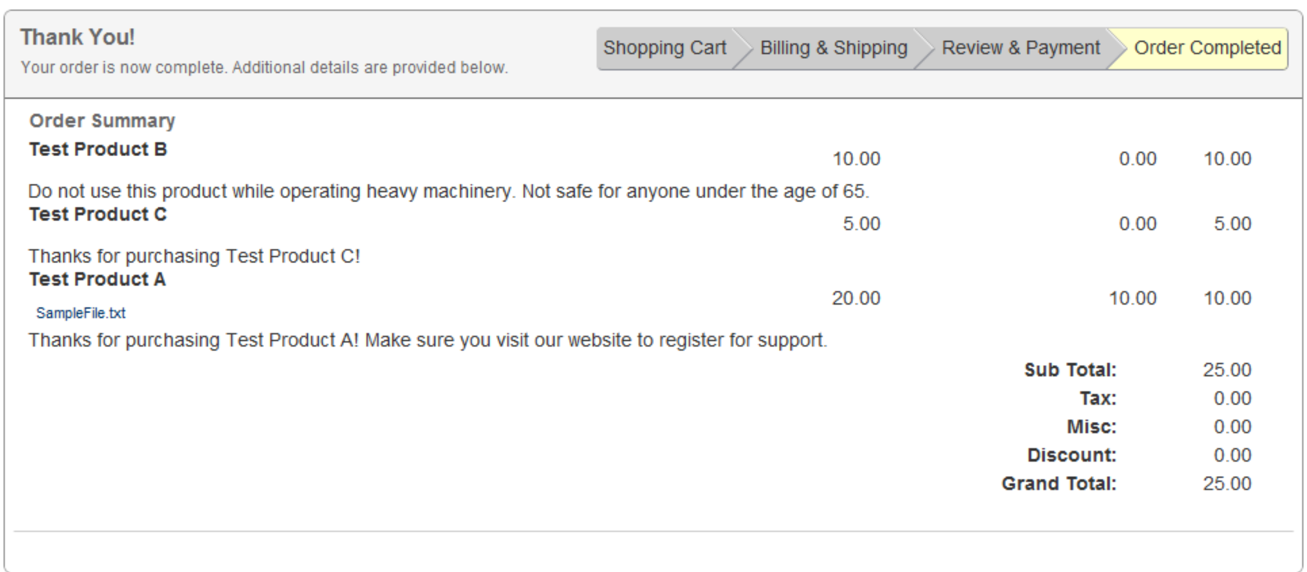
An overview of the Review and Payment page and how to complete the required fields.



- **Shopping Cart**: Displays all products included in the order. This is the last chance to change quantities, or delete products. If additional products need to be added, click Back to Products. If the customer wishes to cancel the order, they can delete all the products and be redirected to the Product Display view.
- **Any special instructions or comments?**: A text area where the customer adds any additional information regarding the purchase.
- **Apply Discount Code?**: Enter any valid discount Coupon Codes, and then click Apply.
- **Total Price**:
  - **Sub Total**: The total before tax, shipping, discounts and any other miscellaneous fees.
  - **Tax**: Automatically calculated based on Tax Rates defined in the control panel.
  - **Shipping**: Applied if enabled, and required for the product.
  - **Misc.**: Miscellaneous fees.
  - **Discount**: The total amount the price was reduced.
  - **Grand Total**: The total price after tax, shipping, discounts and other fees have been calculated.

- **Your Billing and Shipping Information**: Information regarding the customer. This information was entered on the previous step. If there is an error, click Back to Products and begin again. Clicking the back button in the browser will work as well, but may not be recommended.
- **Your Payment Information**:
- Other: If the Other, Bank Transfer or Purchase Order options are selected, no payment information is required. However the seller must contact the customer, in order to get the payment information, to complete the purchase.
- **Credit Card**: Complete these fields:
  - **Name on Card**: The name of the credit card holder as it appears on the card.
  - **Card Number**: The credit card number.
  - **Expiration Date**: Select the expiration date for the card.
  - **CCV**: The short 3 or 4 digit security code on the back of the credit card.
- **PayPal**: Clicking Process My Order will redirect the customer to the PayPal website.
- **Back to Products**: Clicking this button will return to the Product Display view.
- **Process My Order**: Clicking this button will complete the purchase process.

Order Completion



- **Additional Instructions**: The contents of this section is displayed below the name of the product.
- **File Downloads**: Any files that were attached to a product are shown as hyperlinks below the name of the product.

Cross Site Module Sharing

Creating Site Groups

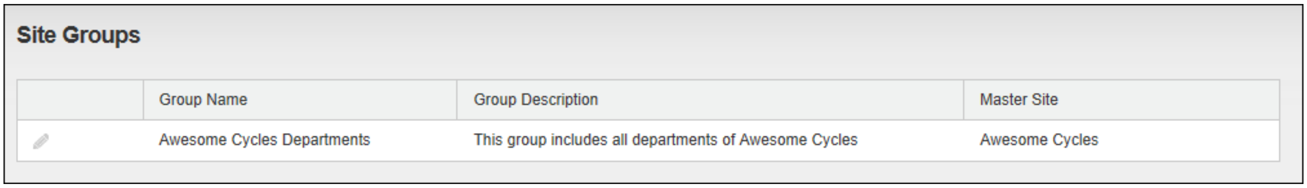
About Site Groups

The Host > Advanced Settings > **Site Groups** page allow user membership and modules to be shared between sites with the same DNN installation. Shared membership allows a user to sign-in to multiple sites with a single set of credentials and manage this single user profile across all sites. Module Sharing permits module content to be shared across sites, allowing editors to update the content on one module and have those changes updated in other copies of that module. Site Groups cannot be added to other pages.

> Note: Roles and files content are not shared across sites within a Site Group. This means users can only view role restricted content or pages of other sites in the group if they are given specific permissions. For example, Site A and Site B belong to the same Site Group, user a from Site A can log on to Site B, but it needs permission from Admin of Site B to view contents unless some contents of Site B already have View permission for All Users.

Important. The sites within a site group must share a common domain name with at least two sections, such as "awesomecycles.biz", for authentication to work. For example, Awesome Cycles has a site for each of their departments: finance.awesomecycles.biz, marketing.awesomecycles.biz and sales.awesomecycles.biz. These sites can all belong to one site group because they share the domain name "awesomecycles.biz". If however you have a site with the domain marketing.awesomecycles.net it cannot be assigned to the above site group.

Warning. All users including SuperUsers and Administrators will be unable to login to sites if a group is created with an incorrect authentication domain. The authentication domain must have at least two sections, such as "awesomecycles.biz". If the authentication domain only has one section then login will fail. For example, if you created a site group with the domain names marketing.biz, finance.biz and sales.biz, then ".biz" would be used as the authentication domain and login would fail. For more on naming sites that can then be added to a site group.

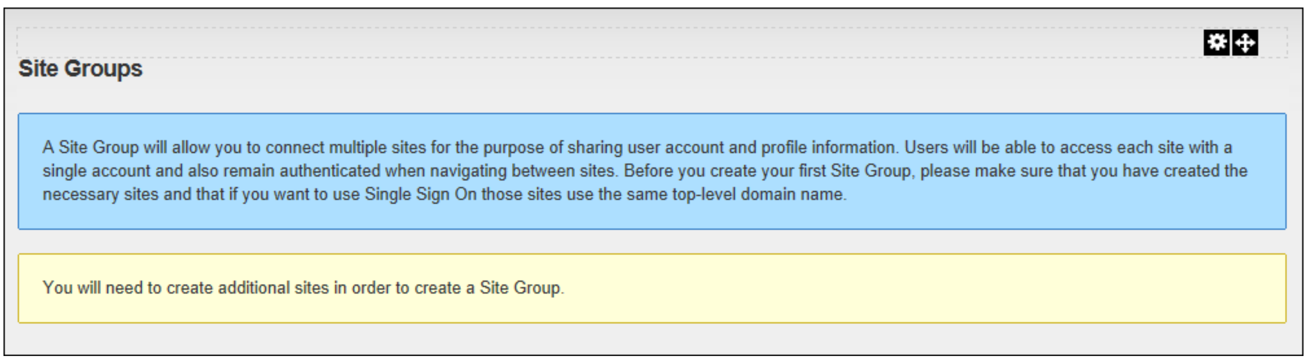


The Site Groups Module

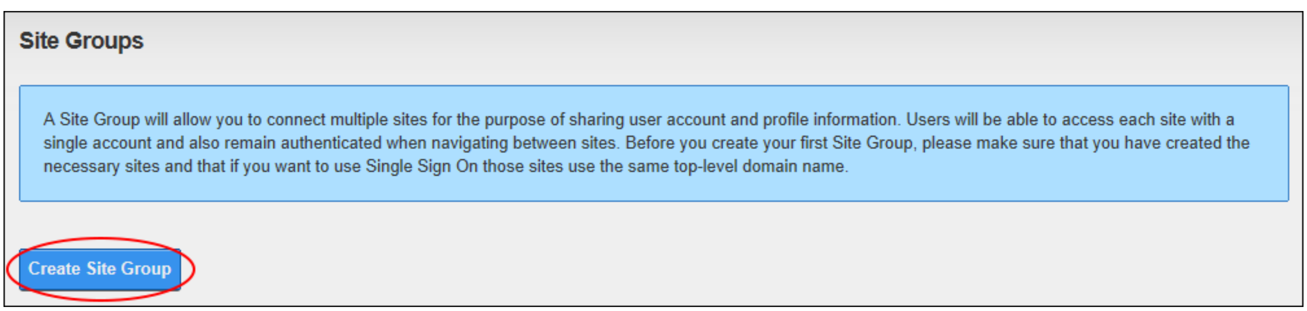
Adding a Site Group

How to create a site group and select the sites within the new group. Note: A site can only belong to one site group. If all of the existing sites are already associated with a site group you will need to create additional sites before you can create a new site group.

Prerequisite. At least three sites must exist in this DNN installation before a site group can be created. See "About Site Groups" and read the important and warning information before continuing.

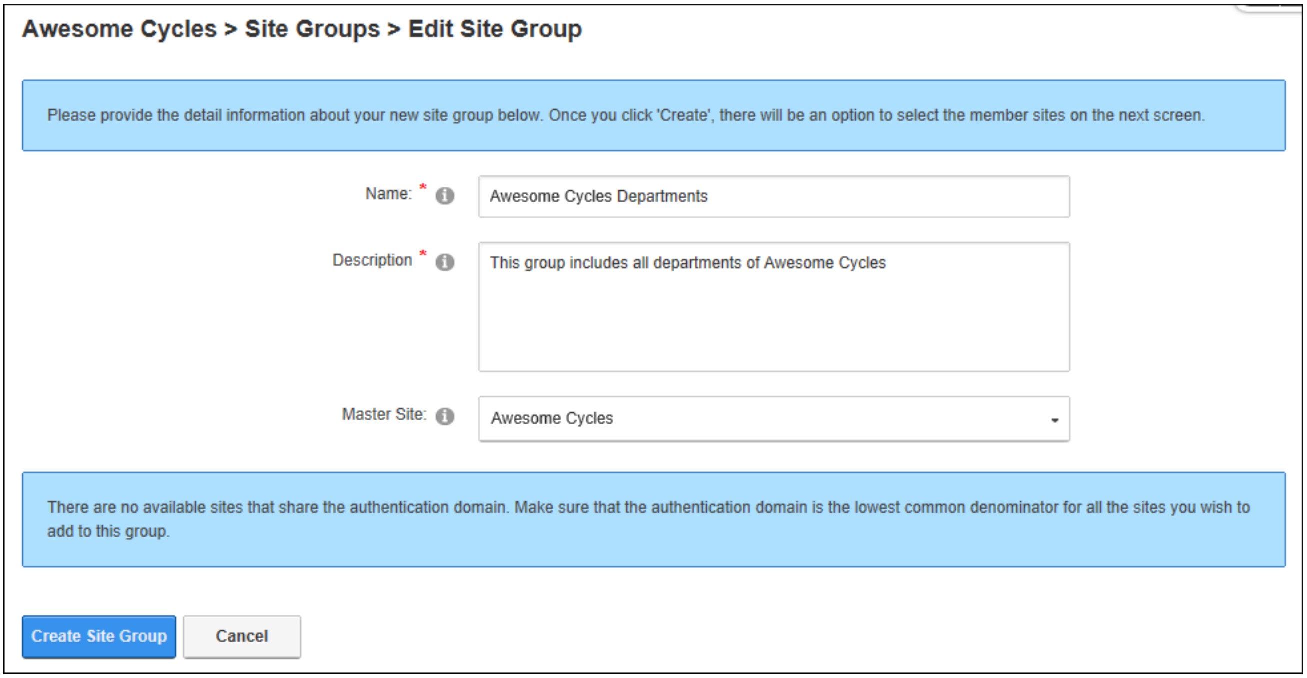


1. Navigate to Host > Advanced Settings > **Site Groups**.
2. Click the **Create Site Group** button.

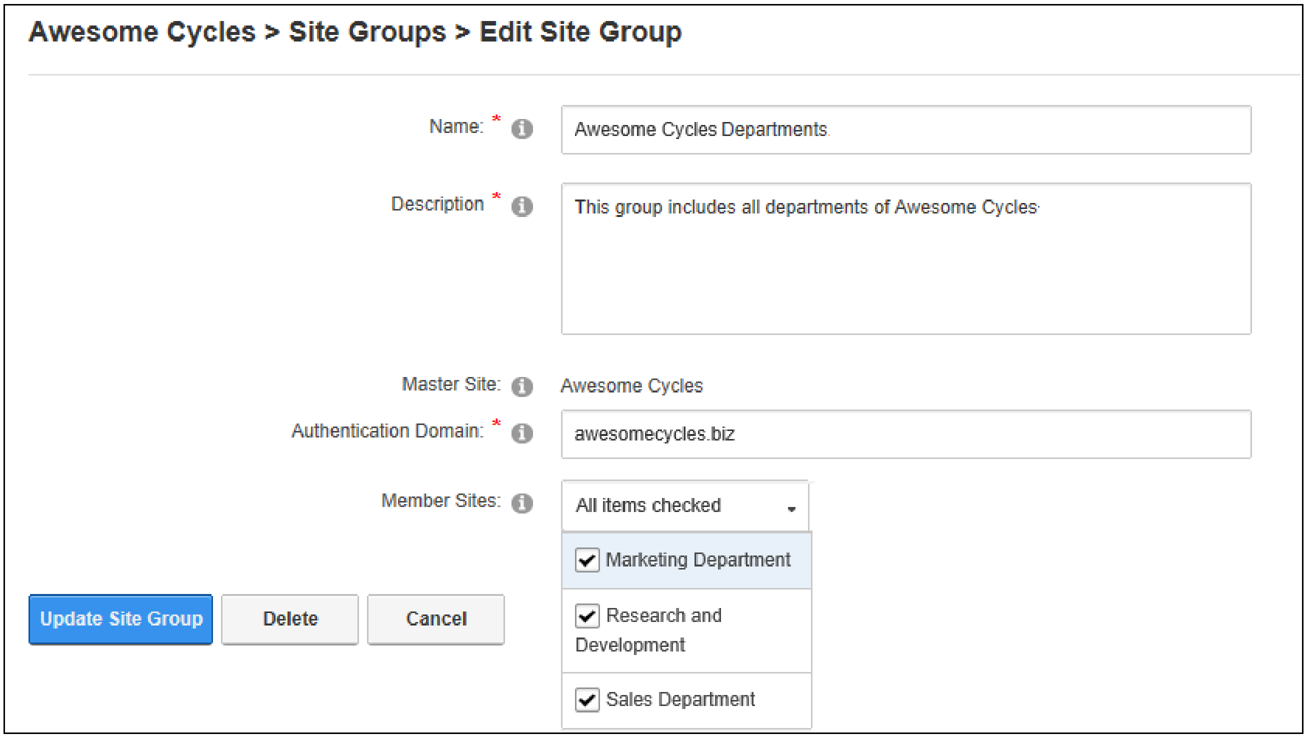


3. In the **Name** text box, enter a name for this group.
4. In the **Description** text box, enter a description for this group.

5. At **Master Site**, select the master site to be used to authenticate users.
6. Click the **Create Site Group** button.



7. At **Member Sites**, click on the name of each site to be added to this site group. This will mark the check box beside each site selected.



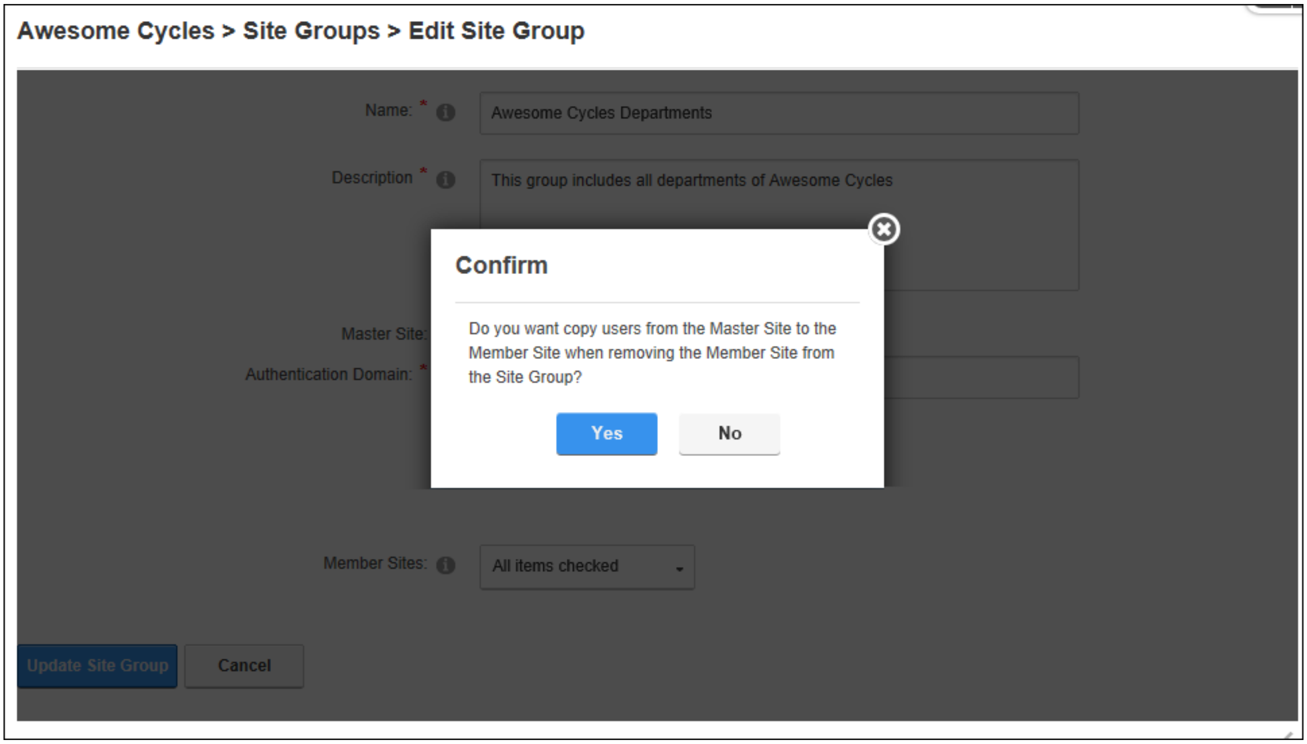
8. Click the **Update Site Group** button.

Deleting a Site Group

How to delete a site group using the Site Groups module. Member sites must be removed from a site group before a site group can be deleted.

Note: If you remove member sites from a site group this does not ensures that all users are copied across to the member sites as required, unless the **Copy Users** check box is checked for removal of all member sites.

1. Navigate to Host > Advanced Settings > **Site Groups**.
2. Click the **Edit** button beside the required site group.
3. At **Member Sites**, click on the name of a site to copy users from the Master Site to the selected site. This will display the Confirmation message "Do you want copy users from the Master Site to the Member Site when removing the Member Site from the Site Group?"
4. Click the **Yes** button to confirm.

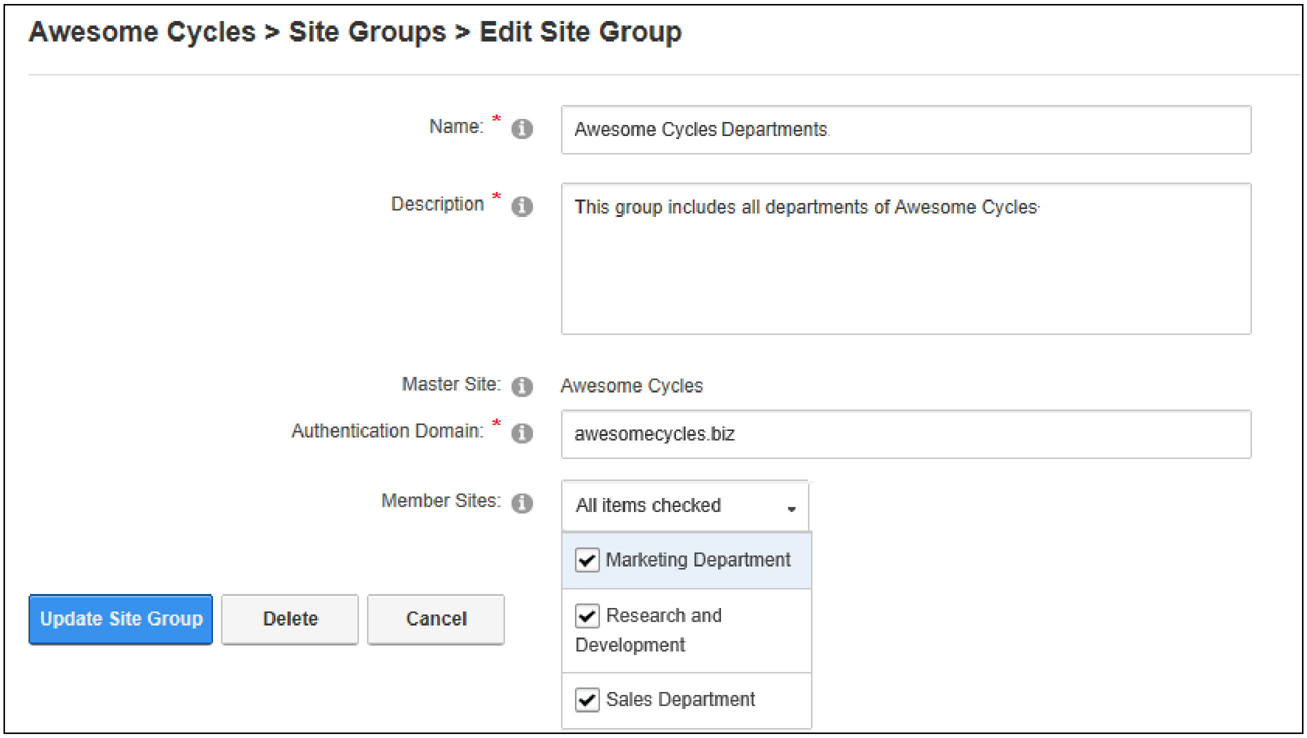


5. Repeat Steps 3-4 to remove each additional site from the group. Once all sites are removed the Delete button will be displayed.
6. Click the **Delete** button. This displays the message "Are You Sure You Wish To Delete This Site Group?"
7. Click the **Yes** button to confirm.

Editing a Site Group

How to edit the details of a Site Group and modify the sites within that group. In the below example, the Research & Development department is removed from the group and only the Administrator remains in the site.

1. Navigate to Host > Advanced Settings > **Site Groups**.
2. Click the **Edit** button beside the required site group. This displays the Edit Site Group page where you can edit any of the optional fields. Note that in the below image, there are three members sites in this group.



3. In the **Name** text box, edit the group name if required.
4. In the **Description** text box, edit the description if required.
5. To add a site to the site group, go to **Member Sites** and click on the name of each site to be added to this site group. This will mark the check box beside each site selected.
6. To remove a site from a site group, go to **Member Sites** and click on the name of the site to be removed. This will display the Confirmation message "Do you want copy users from the Master Site to the Member Site when removing the Member Site from the Site Group?"
7. Click the **Yes** button to confirm. Only the Admin user will remain to the selected site.
8. Repeat Steps 6-7 to remove additional sites from the group.
9. Click the **Update Site Group** button.

Troubleshooting: No Site Listed in Available Sites List

The Site Groups function takes the URL of the original Host user login as the Authentication Domain. The Authentication Domain is used to find the Available Sites. For example, if a user logs on to the site main.sitegroup.com when a user creates a site group, the Authentication Domain will be main.sitegroup.com. If the other sites are marketing.sitegroup.com and sales.sitegroup.com, these two sites will not be listed under Available Sites list, because these two domain names do not have main.sitegroup.com as last part of their domain names. As a result, the user cannot add these two sites to the site group. If this happens, the following information message will be displayed "There are no available sites that share the authentication domain. Make sure that the authentication domain is the lowest common denominator for all the sites you wish to add to this group."

If the user wants to add these two sites to the site group, there are two options:

Option One: Create the site group with the default Authentication Domain as main.sitegroup.com assuming that user logs on main.sitegroup.com.

1. Click the **Edit** button beside the required site group.
2. Modify the Authentication Domain from main.sitegroup.com to sitegroup.com.
3. Click the Update Site Group link. The marketing.sitegroup.com and sales.sitegroup.com sites will appear in Available Sites list so that user can add them to the site group.

Option Two: Before creating the site group, ensure that the site which the user logs on to as the Host is sitegroup.-com, without anything before "sitegroup.com". This will make the Authentication Domain "sitegroup.com" and fin-ance.sitegroup.com and engineering.sitegroup.com will appear under Available Sites automatically.

Sharing a Module

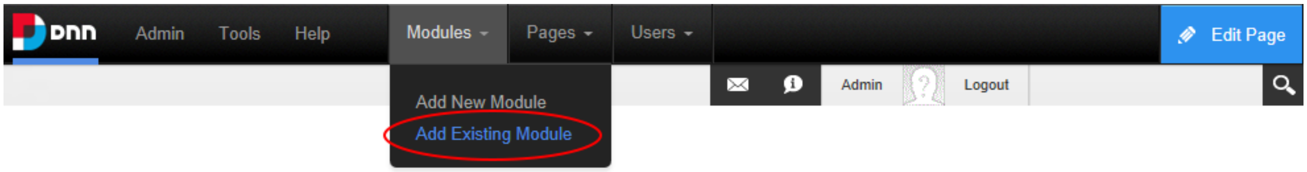
Adding an Existing Module

How to add an existing module to the current page using the ControlBar. The module content is shared so if you update the content on one module the content in the other module also updates. Note: You cannot add an existing module to the page where it already exists. Users must be authorized to deploy a module and have the appropriate page editing permissions to add a module to a page. See "Setting Page Permissions (Evoq Content)"

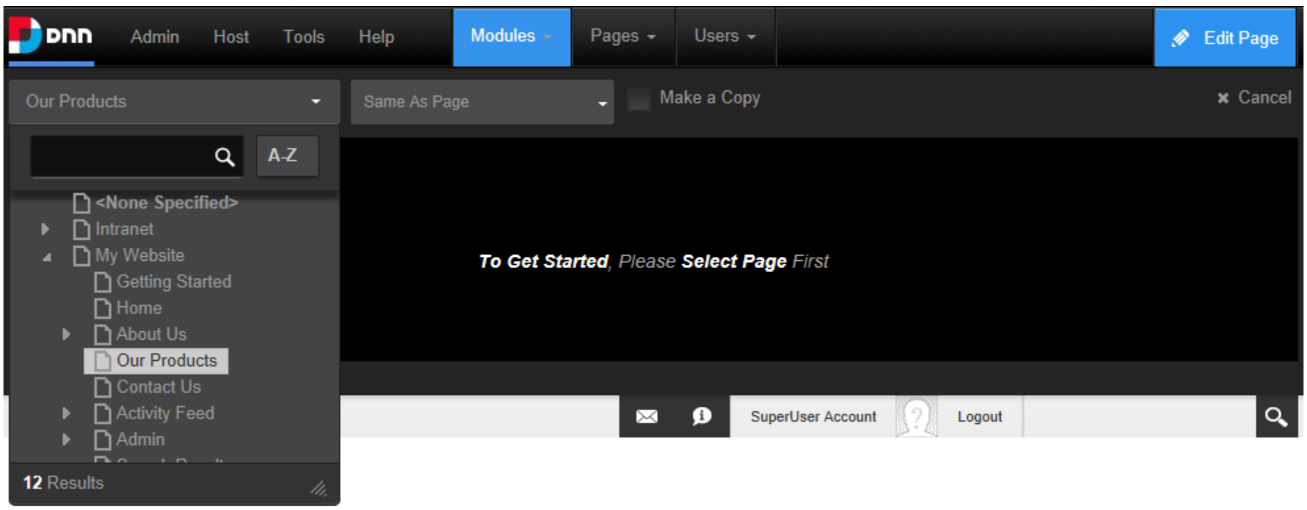
Prerequisite. To add a module that exists on another site, the module must be located on a site that belongs to the same Site Group (See "About Site Groups"), module sharing must be enabled on the module and the module type must support module sharing.

Option One - Drag and Drop Module

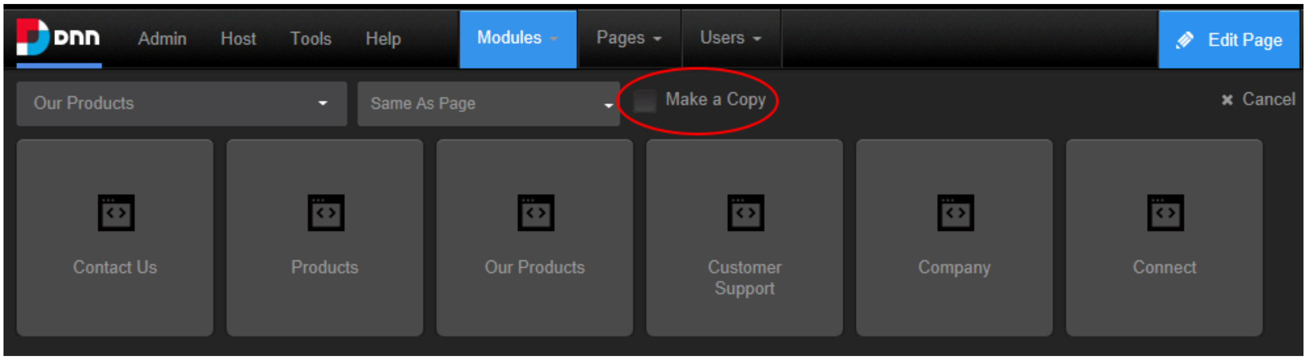
1. On the Control Bar, hover over the **Modules** drop down menu and then select **Add Existing Module**.



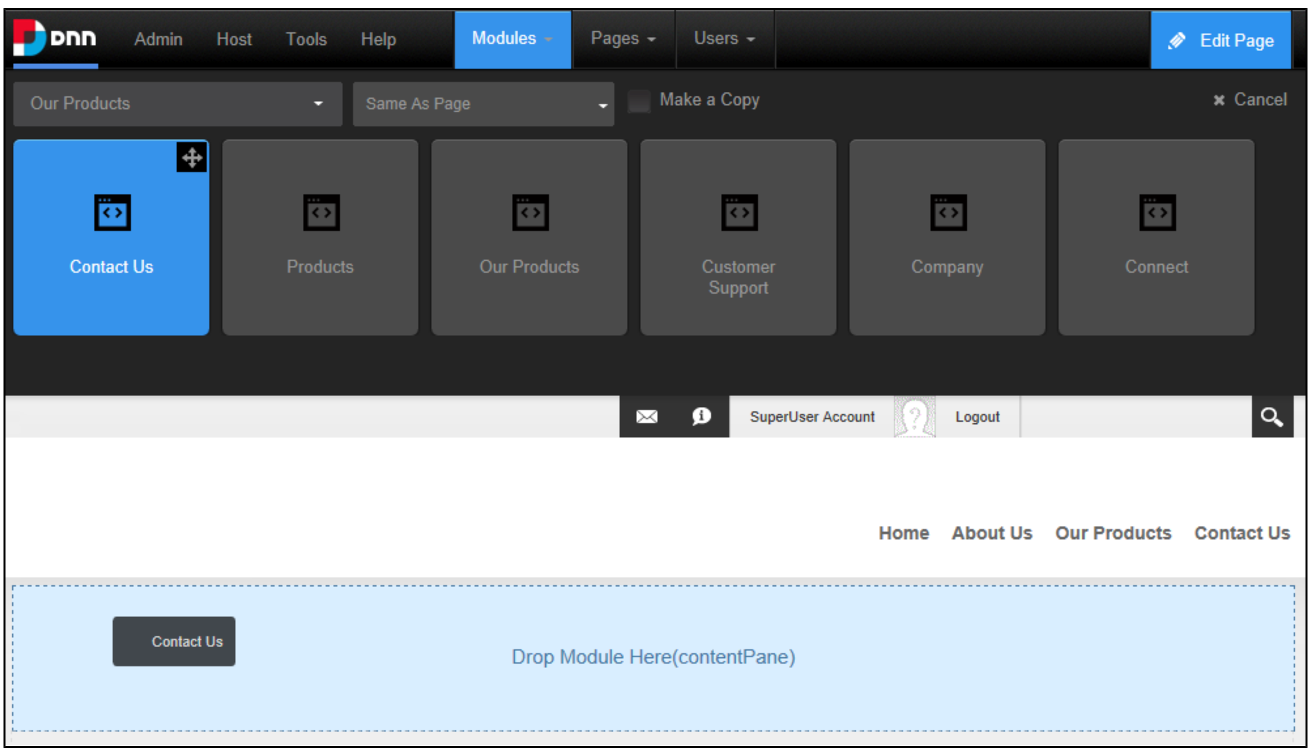
2. If your site belongs to a Site Group, select the name of the site that the module it located on from the **Select Site** drop down list.



3. At **Select Page**, select the page that the module is located on.
4. Select from these options on the next drop down list:
   - **Same As Page**: This sets the module as visible to all roles/users who can view this page. This is the default setting.
   - **Page Editors Only**: The sets module as only visible only to the roles/user who can edit this page. You might choose this option if you want to add content and configure the module settings before others can view the module.
5. At **Make a Copy**, mark the check box to create an independent copy of the module content that can be modified without affecting the original existing module - OR - unmark the check box to use the share the same module content across both instances of the module so that updating content on one module will change the content on both modules. This is the default setting.



6. Locate the module to be added using the scroll bar located below the module list and then hover your mouse over the module to be added. This displays the message "Drag to add this module to the page below". Left click on the required module and then drag it down the page until the pane you want to add it to is highlighted with the message "Drop Module Here"



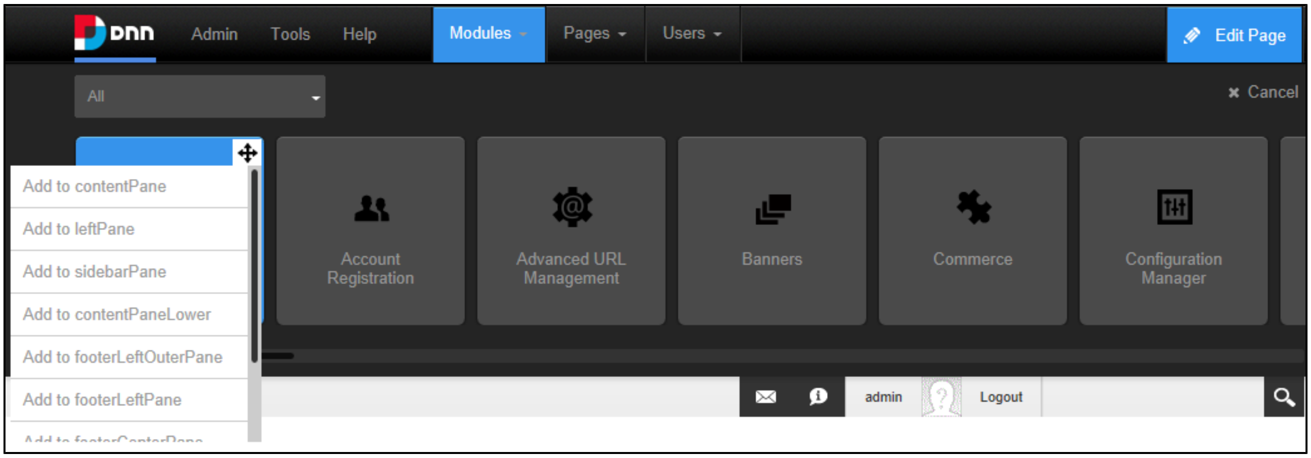
7. Release your mouse button. The module is now added to the page.

Note: When adding an existing module from another site, a warning message will be displayed advising that the module may not support module sharing. Exceptions are HTML Pro and the Journal which have been developed with module sharing capabilities.

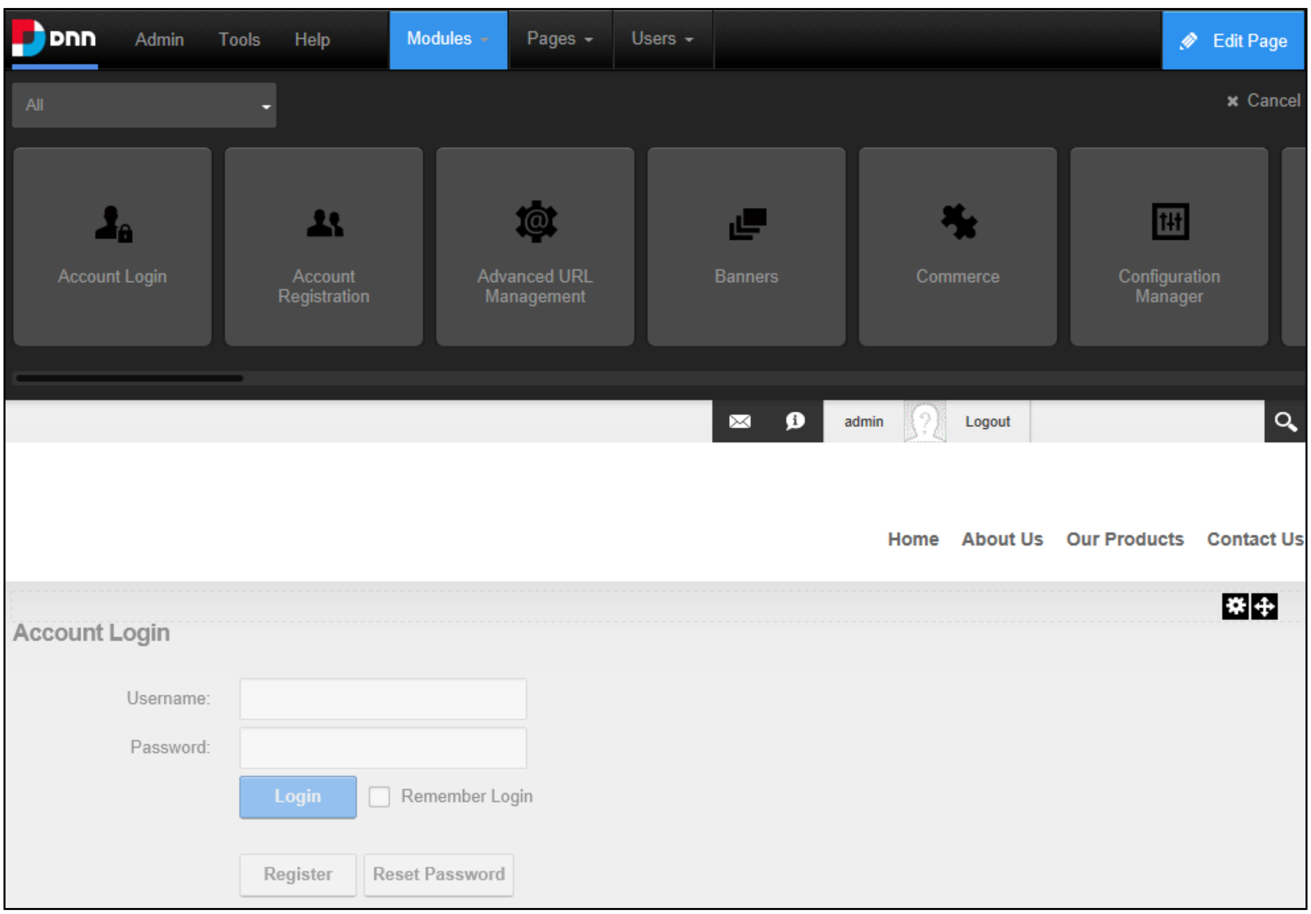
Option Two - Insert Module

1. On the Control Bar, hover over the **Modules** drop down menu and then select **Add Existing Module**. This will load and display a list of the modules within the Common category, or the previously selected category.
2. **Optional.** If the required module isn't displayed, select the category that the module belongs to from the drop down box which is displayed above the list of modules. The available categories are:
   - **All**: Modules within all categories including those that haven't been associated with a category. This is the default option.
   - **Admin**: Modules that are typically used for site administration rather than managing content such as the Extensions and Digital Asset Management modules.
   - **Common**: Modules selected as frequently used.
   - **Enterprise**: Modules that are only included with Evoq Content Enterprise.
   - **Professional**: Modules that are only included with Evoq Content.
3. At **Select Page**, select the page that the module is located on.
4. Select from these options on the next drop down list:
   - **Same As Page**: This sets the module as visible to all roles/users who can view this page. This is the default setting.
   - **Page Editors Only**: The sets module as only visible only to the roles/user who can edit this page. You might choose this option if you want to add content and configure the module settings before others can view the module.
5. At **Make a Copy**, mark the check box to create an independent copy of the module content that can be modified without affecting the original existing module - OR - unmark the check box to use the share the same module content across both instances of the module so that updating content on one module will change the content on both modules. This is the default setting.
6. Locate the module to be added using the scroll bar located below the module list and then hover your mouse over the module to be added. This displays the **Move** icon in the top right corner of the module.

7. Mouse over the **Move** icon to open the drop down menu and then select the pane that you want to add the module.



8. The module is now added to the page.



Related Topics:

- To select the users who can view and edit the module, See "Setting Module Permissions"

My Modules

About My Modules

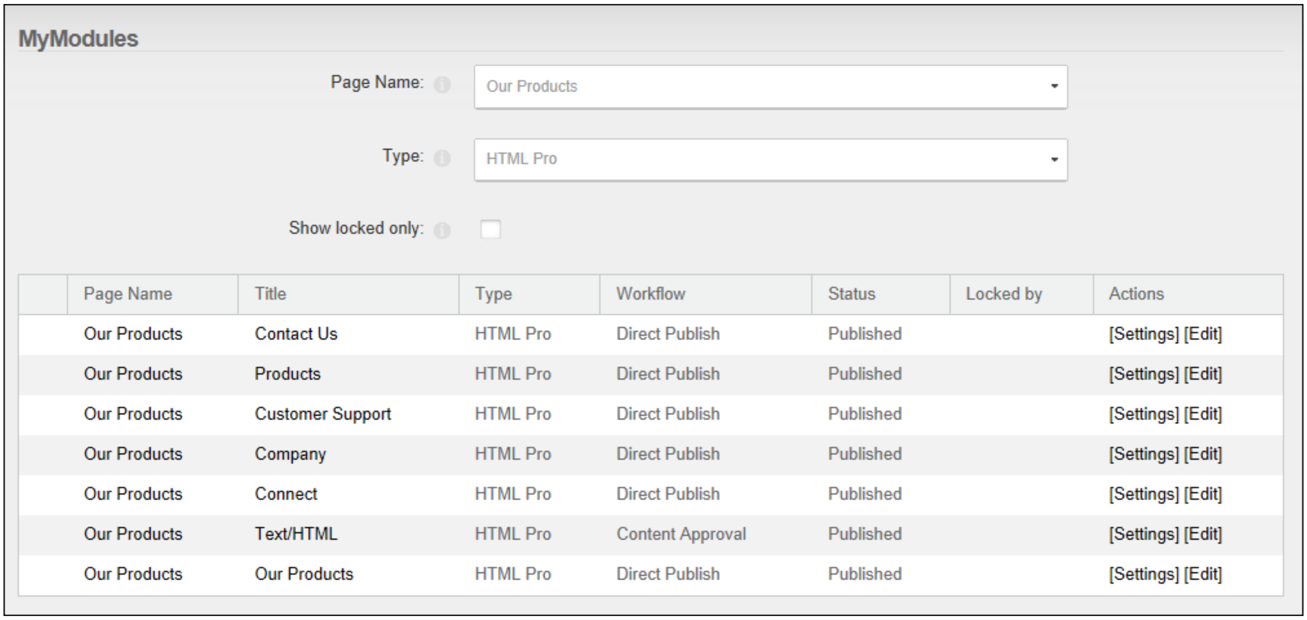
My Modules displays a list of the modules that the current user is authorized to edit. The following details are listed for each module that can be edited:

- **Page Name**: The name of the page where the module is located. Click on a page name to go to that page.
- **Title**: The title given to the module. Click on a module title to go to that page.
- **Type**: The type of module. E.g. Links module, HTML module, HTML Pro module
- **Workflow**: The type of workflow that has been set for each module.
- **Status**: The current status of the module content in the workflow.
- **Locked By**: If the content status is locked, the name of the user who locked the content will be displayed.
- **Actions**: Lists the editing rights (permissions) granted to this user. Click the Settings or Edit link to go directly to the either settings or edit page for this module.

My Modules includes the following filters that can be applied separately or at one time to limit the results.

- **Page Name**: Select a page name to only view results for modules on that page.
- **Type**: Select a type of module, such as HTML Pro, to only view results for that module type.
- **Show Locked Only**: mark the check box to only view results for modules that have locked content.

Module Version/Minimum DNN Version: The version number is always the same as the DNN framework version number.



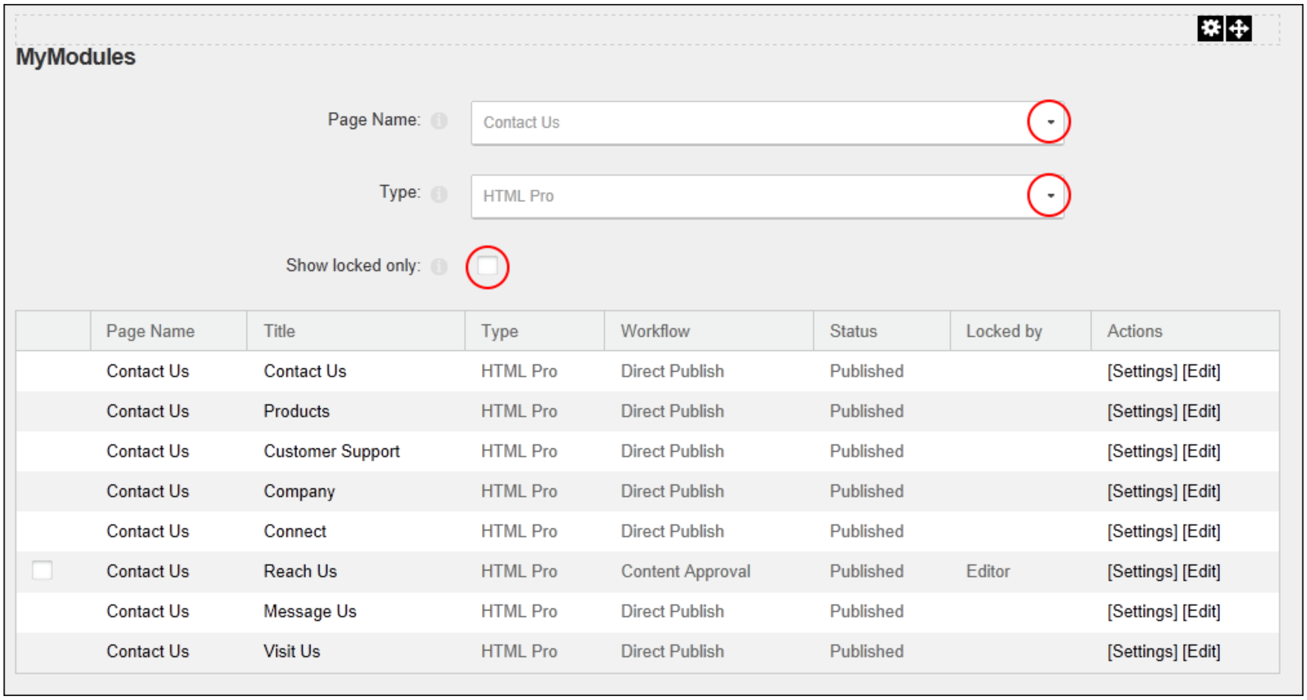
My Modules

Managing My Modules

Filtering the Modules List

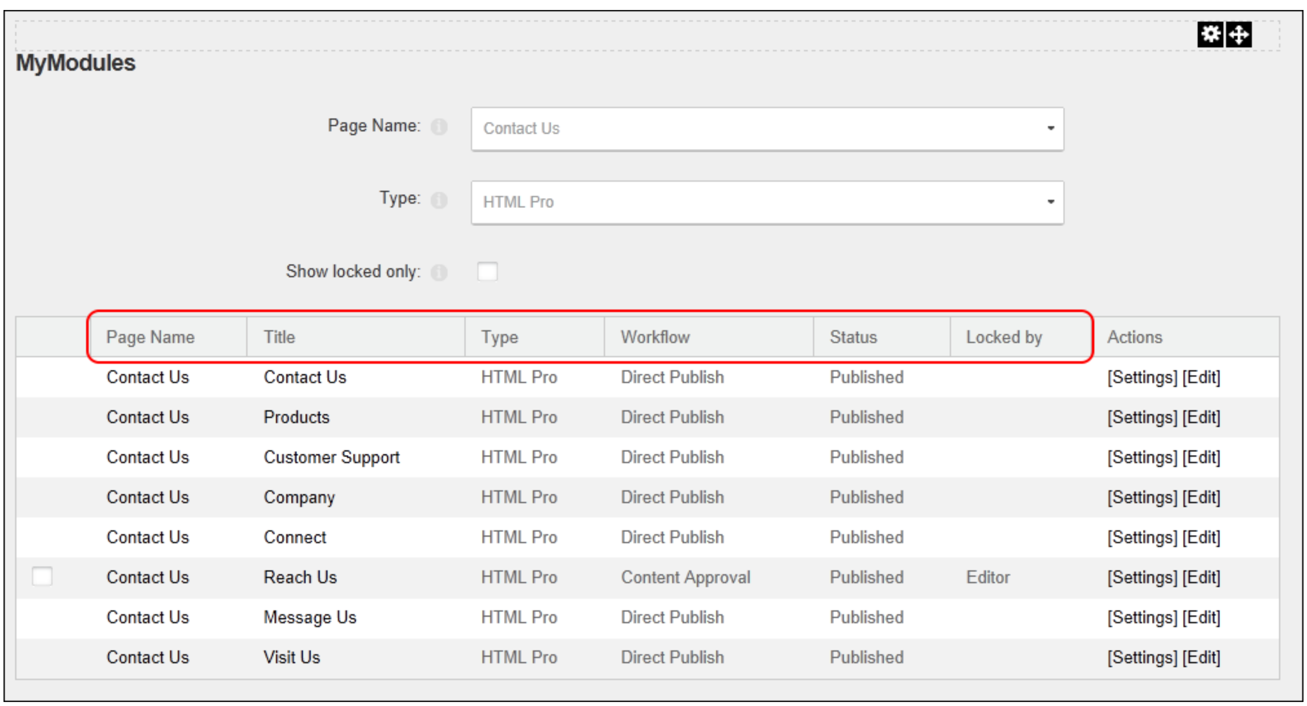
The following filters that can be applied separately or one at a time to limit the results.

- **Page Name**: Select a page name to only view results for modules on that page.
- **Type**: Select a type of module, such as HTML Pro, to only view results for that module type.
- **Show Locked Only**: mark the check box to only view results for modules that have locked content. This is useful to quickly locate the modules that are ready for the next phase of workflow. E.g. Edit, Approve or Reject.



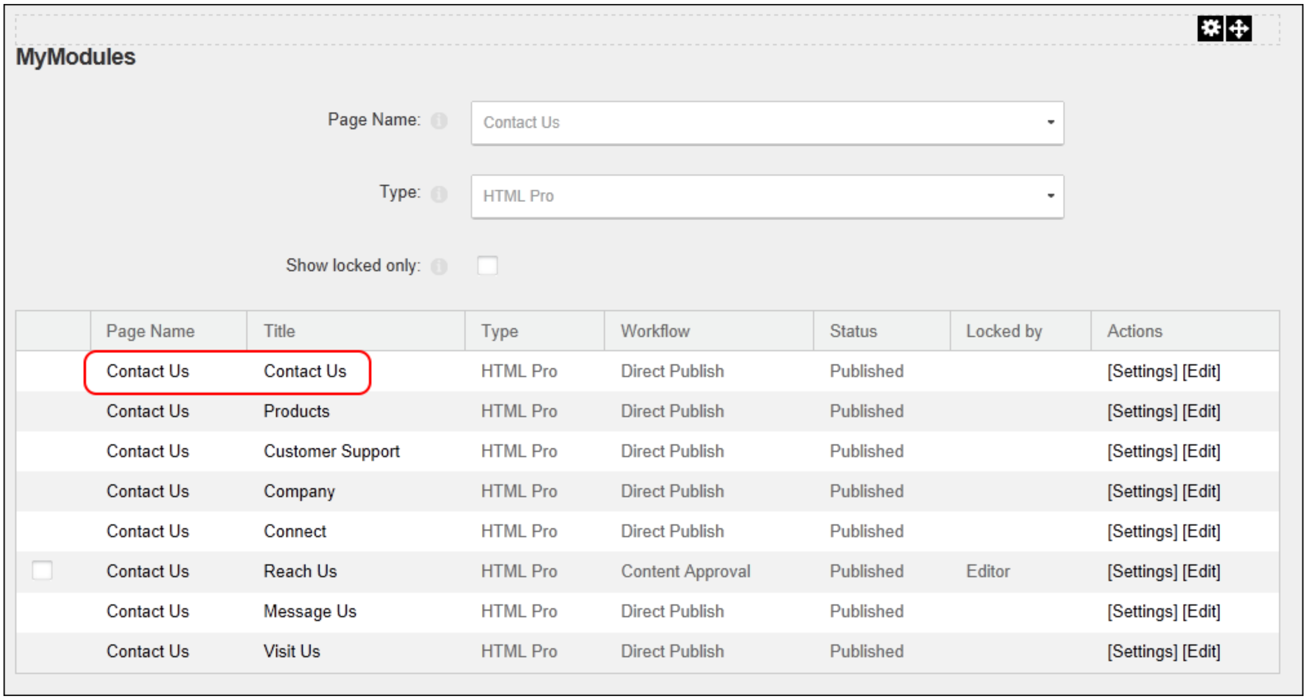
Sorting the Modules List

Users are able to sort results by all columns (apart from the Actions column) by clicking on the column name.



Navigating to a page or module

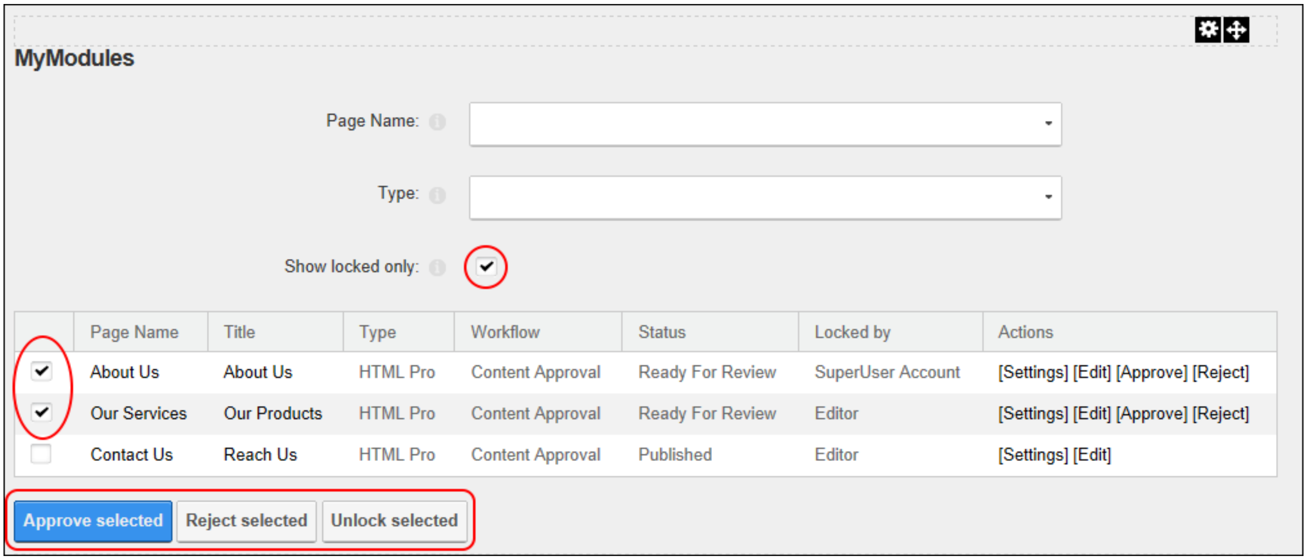
Users can navigate directly to a page or module by clicking on the page name or module title in the Page Name or Title columns respectively.



Managing Multiple Modules

The user can approve and publish, reject or unlock the content of one or more modules directly from the My Modules module.

1. At **Show Locked Only**, mark the check box to filter the list so only the modules that are ready for the next stage of workflow are displayed. In the **Status** column you can view the current state of the modules.
2. Mark the check box beside each module to be Approved, Rejected or Unlocked.
3. Select the action to be taken for the selected modules:
   - **Approve Selected**
   - **Reject Selected**
   - **Unlock Selected**



Page Management

Setting the Error Pages

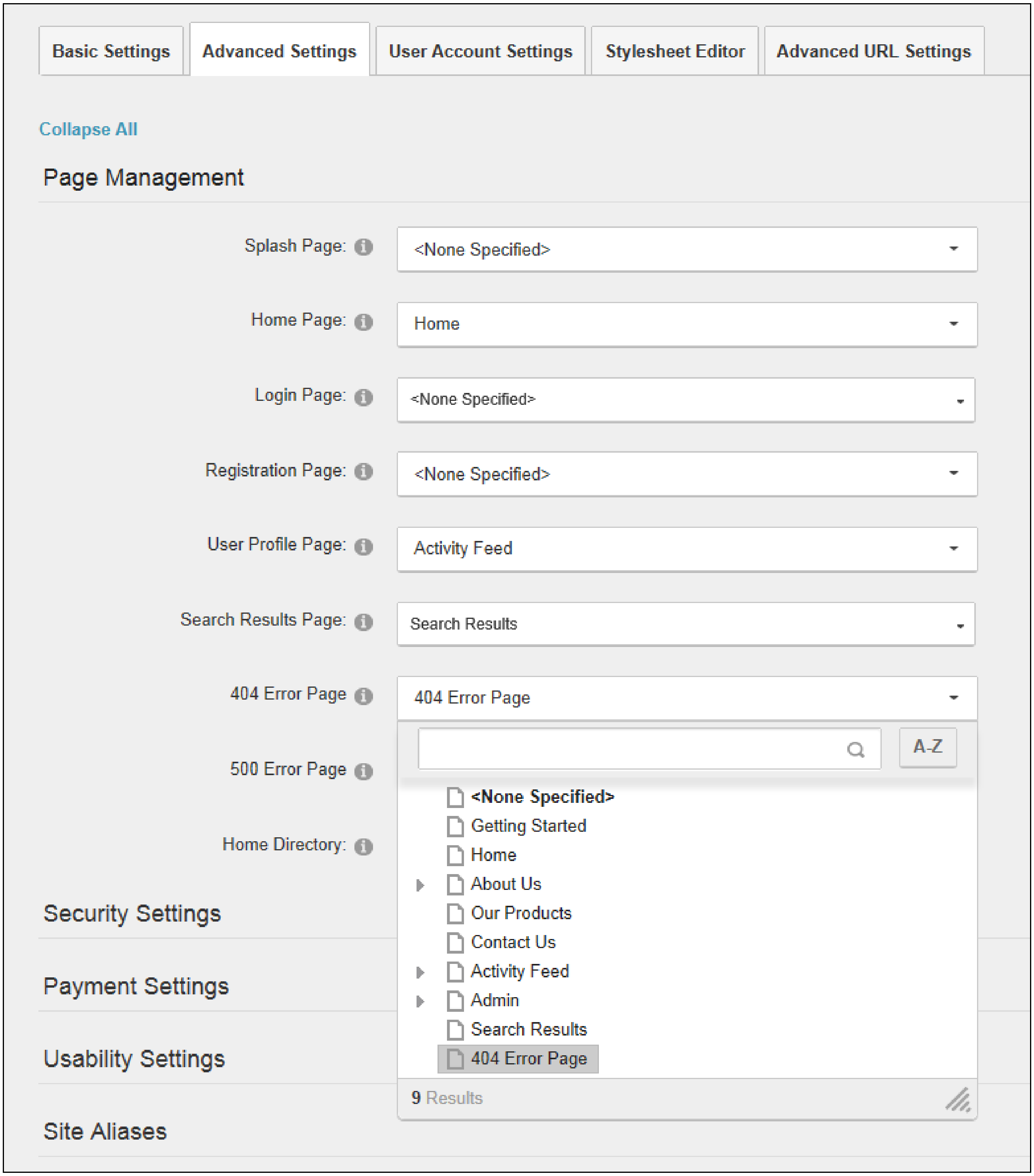
How to set the pages that will be used when a 404 error (page not found) or 500 error (an application error) occurs. For an upgrade site, a new Page should be created specifically to show a "Page Not Found" error to site visitors. Once this page has been created, then set the location of the page through the 404 Error Page. It is advised to use the special 404 Page skin for this page, or to develop a skin similar to it. The 404 error page skin reduces the number of Skin Objects which do not work well when shown with a 404 error code.

Prerequisite. If you want to use custom error pages you should create these pages, ensuring All Users are granted View permissions and add the required content to the page.

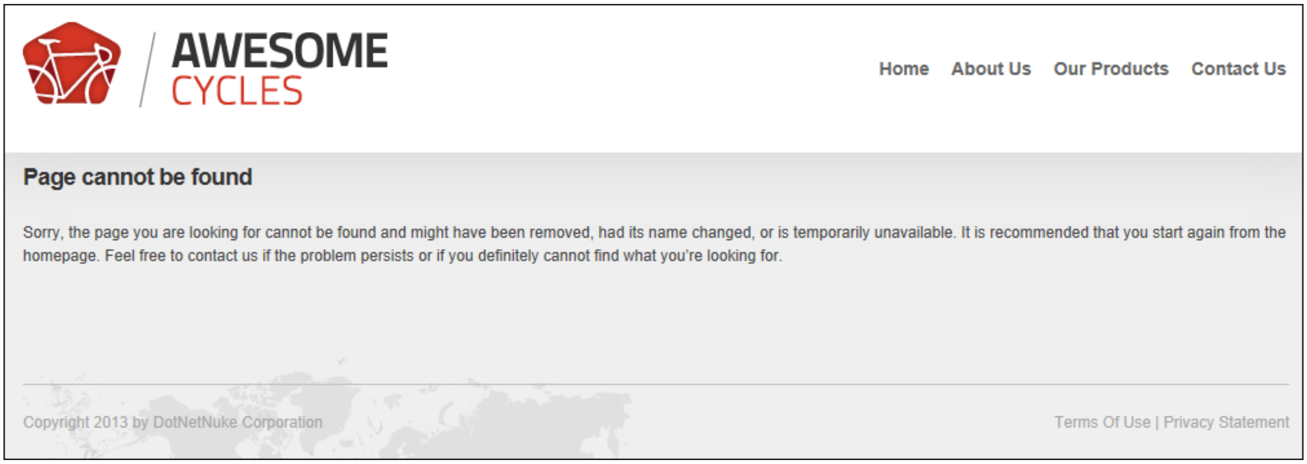
1. Navigate to Admin > **Site Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Page Management** section.
4. **Optional.** Click on the country flag icon associated with the culture (language) to be updated. This field only displays when multiple languages are enabled.
5. At **404 Error Page**, select the page that will be displayed when this error occurs. Pages are listed in the order they appear in the menu by default, however you can choose to order them in **A-Z** or **Z-A** order, or perform a search for all or part of a page name.

- Select the page named **404 Error Page** to use the 404 error page included with DNN. This page can be modified in the same way as any other site page.
- Select your custom 404 error page from the drop down list.
- Select **<None Specified>** to use the default 404 error page of your web browser.

6. At **500 Error Page**, select from the following options to select the page that will be displayed when this error occurs:
    - Select any page from the drop down list.
    - Select **<None Specified>** to use the default 500 error page of your web browser.



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



The default 404 page included with DNN

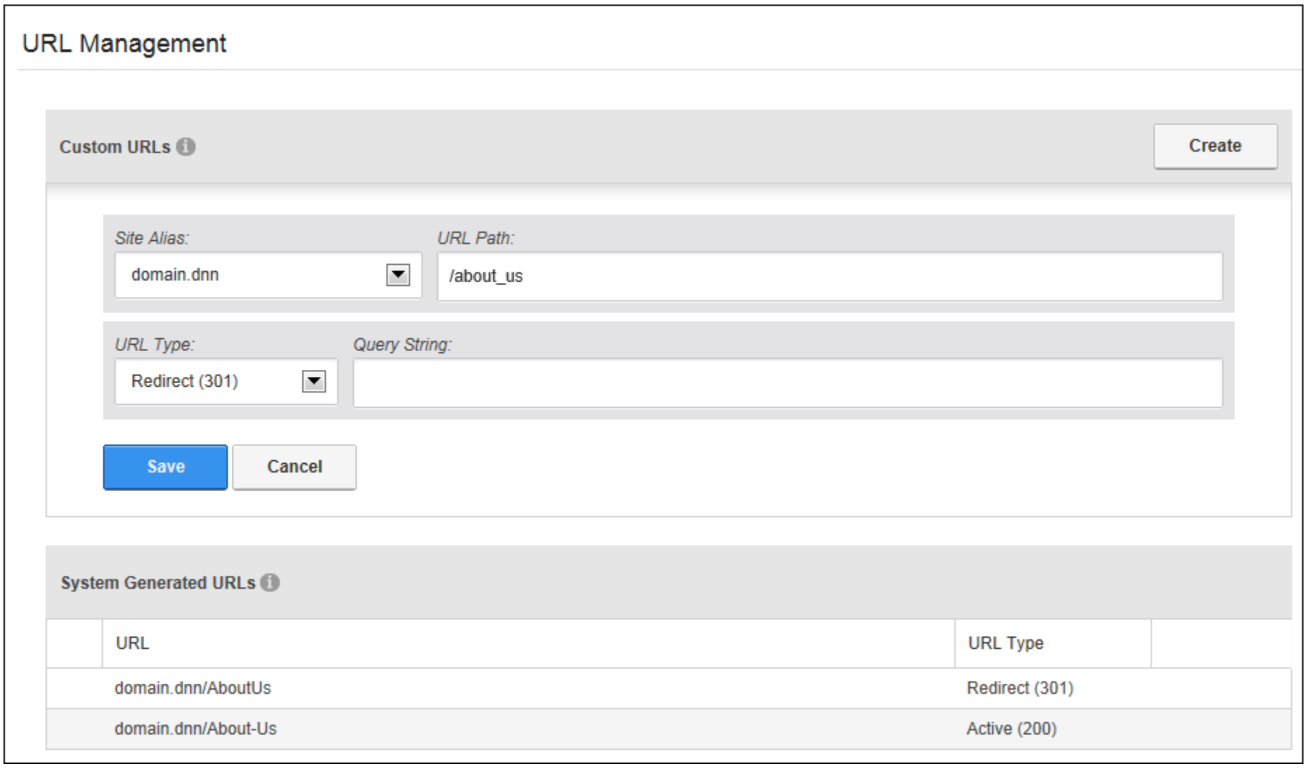
URL Settings for Pages

How to create custom URL's for this page and define how each URL will be handled.

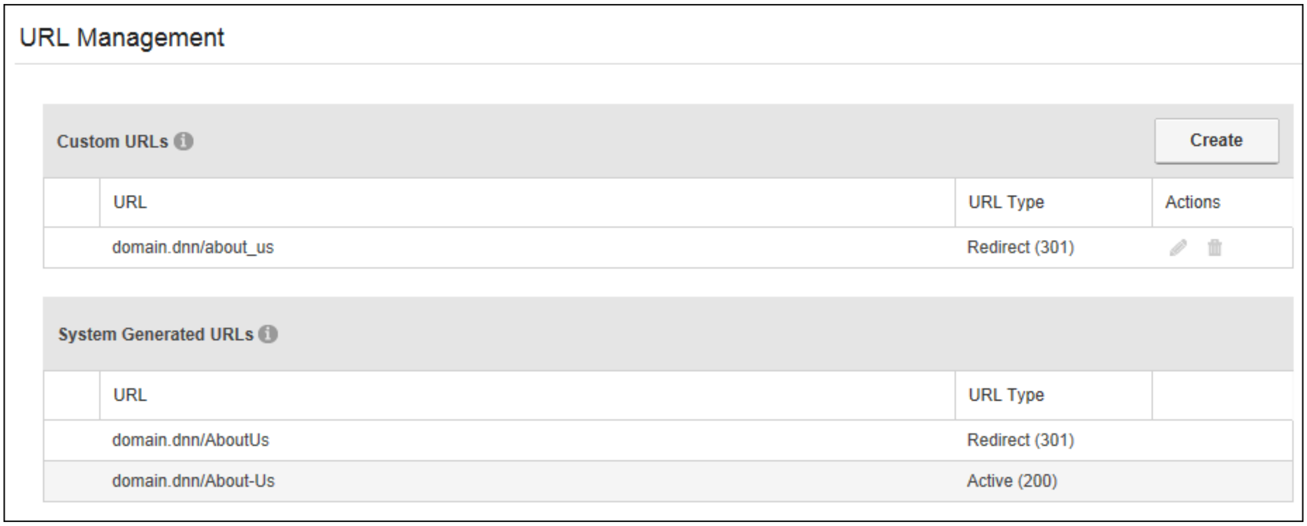
1. Navigate to the required page.
2. Select **Page Settings** from the Edit Page menu on the ControlBar.
3. Select the **Advanced Settings** tab.
4. Expand the **URL Management** section. Here you can create custom URL's for this page and define how each URL will be handled. This section also lists the system generated URL's for this page. System generated URL's include any prior URL's for the page, including redirects created from moving or renaming a page, and any variations of a page URL from settings such as the page-URL concatenation field.
   - To create a new custom URL for this page:
     1. Click the **Create** button.
     2. At **Site Alias**, select the site alias that you want this alias to use.
     3. In the **URL Path** text box, enter the new URL to be created.
     4. In the **Query String** text box,
     5. At **URL Type**, select from these options:
        1. Select **Active (200)** to make this URL path the new URL for this page. E.g. If the Page URL is domain.com/about-us and you want to replace that with this URL, say domain.-com/new-about-us, then select this option to make the new URL for this page domain.-com/new-about-us. You can have multiple 200 URL's per page depending on the

combination of other URL's, Site Aliases and languages for the specific page. This setting differs from the Page URL field which provides a simple way to create an 'Active (200)' URL for the page without using the custom URL features. Any URL created from the Page URL field will synchronize with the Custom URL's grid.

2. **Redirect (301)** to redirect this URL path to the page. E.g. If the Page URL is domain.-com/about-us you might want to redirect all previous versions of this URL, say domain.-com/old-about-us or domain.com/ourcompany/aboutus.aspx, or domain.com/aboutus.html, to the current page URL.



3. Click the **Save** button. Note: To delete or edit a custom URL, click the **Delete** or **Edit** buttons beside the URL as required.



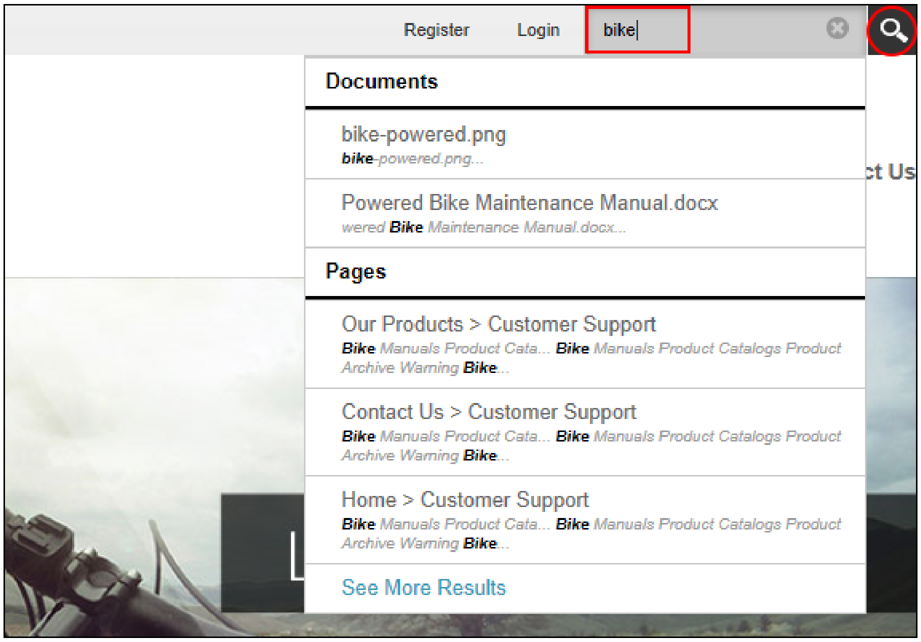
5. Click the **Update Page** button.

Search Results

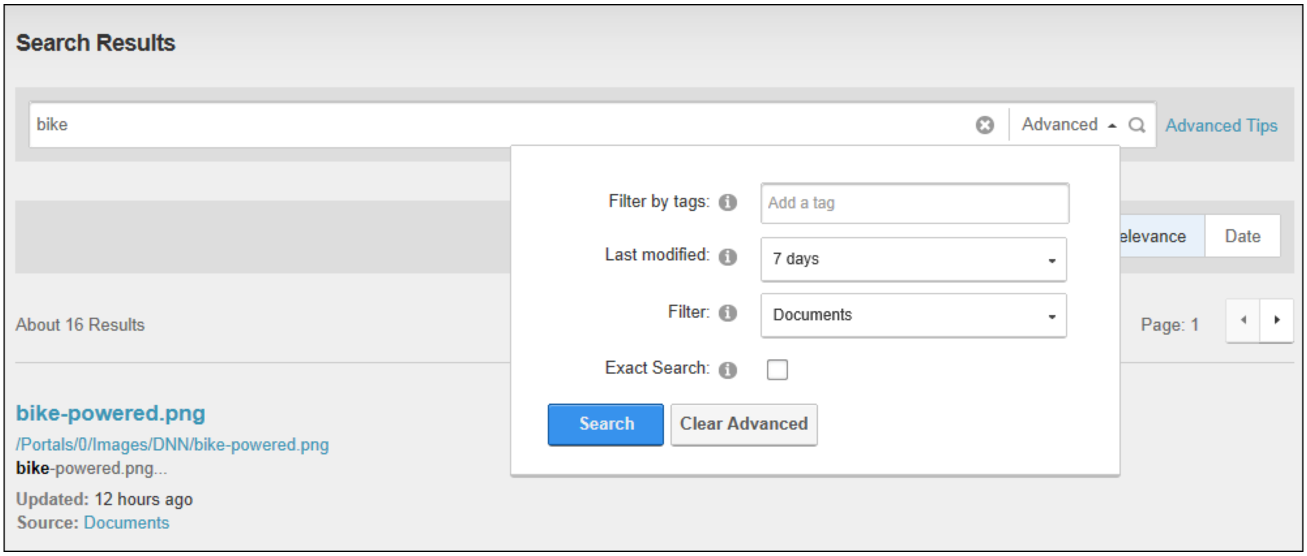
Performing an Advanced Search

How to search all site content including page content, site files including the content of files and images including the image title and alternative name. This search can be performed using either the default search box or using the Search Results module.

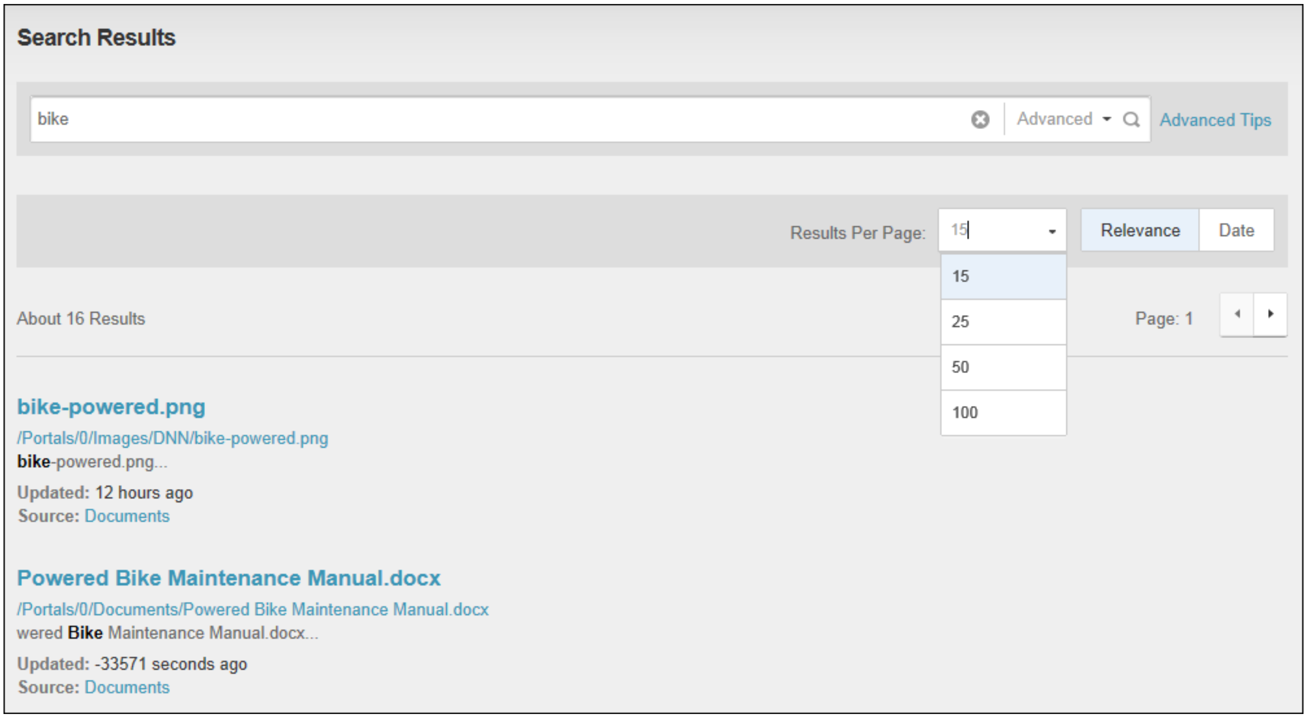
1. Enter your search criteria in the search box displayed in the top right corner of any page or into a Search Results module. The top five results are displayed as you type. If the result you want is displayed, then simply click on it. If the result is a site pages you will be taken to the page. If the result a file such as an image or a document, the file will be opened or available for opening directly from the search results.



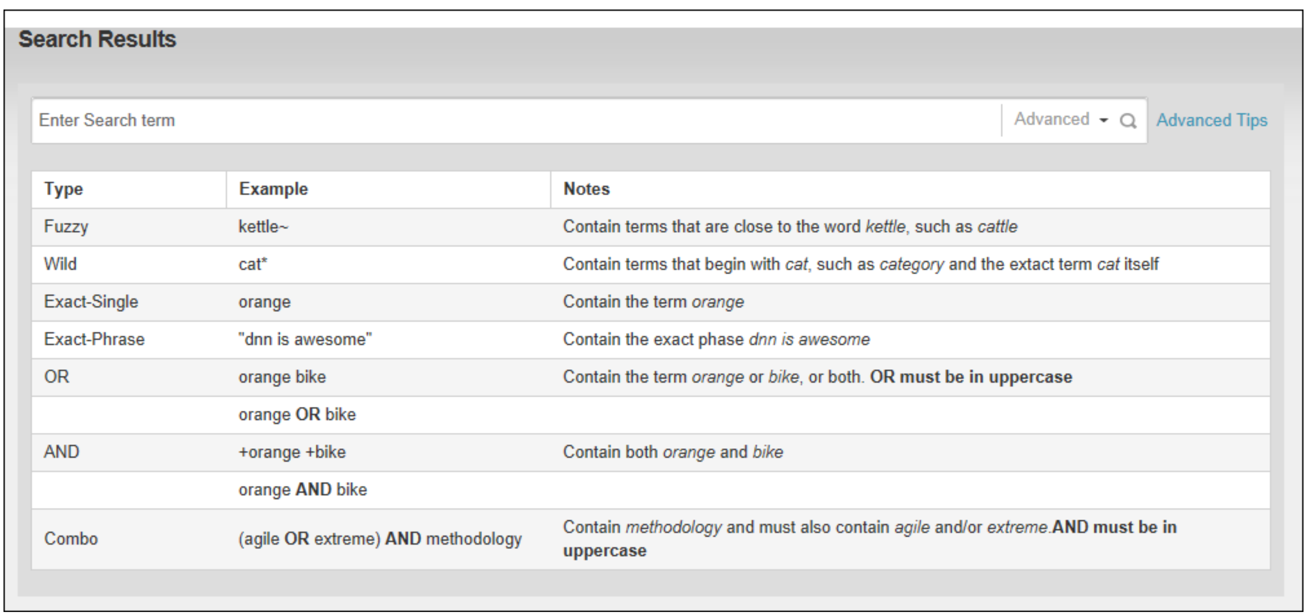
2. Click the See More Results link or the **Search** button to go to Search Results page where you can view additional results and configure additional advanced options.
3. **Optional.** Click the **Advanced** button to open the Advanced options drop down window where you can set one or more of these advanced search criteria:
   1. **Filter by Tags**: Enter one or more tags to only view results that include this tag.
   2. **Last Modified**: Select an option to only view results for items that were modified within the last 1 day, 7 days, 30 days, 90 days or 1 year.
   3. **Filter**: Select to filter results by one or more locations.
   4. **Exact Search**: mark the check box to only view exact matches.
   5. Click the **Search** button.



4. On the Search Results page you can now choose from these options to modify the order and number of current results and view additional results:
   - **Results Per Page**: Select the number of results to be displayed on one page: 15, 25, 50, or 100.
   - **Relevance**: Select to display the most relevant results at the top of the list.
   - **Date**: Select to view the most recently added results at the top of the list.
   - **Page [1]**: Click on the **Next** button to view results on the next page.



Tip: Click the Advanced Tips link to view detailed information on how to perform a wide range of advanced searches.

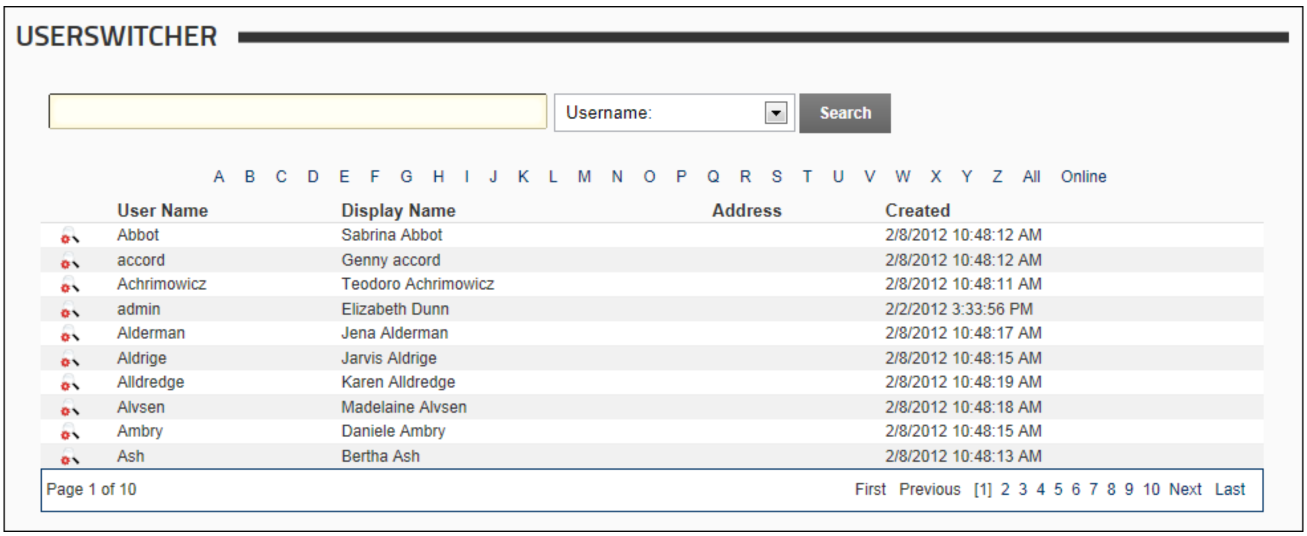


Type	Example	Notes
Fuzzy	kettle~	Contain terms that are close to the word *kettle*, such as *cattle*
Wild	cat*	Contain terms that begin with *cat*, such as *category* and the extact term *cat* itself
Exact-Single	orange	Contain the term *orange*
Exact-Phrase	"dnn is awesome"	Contain the exact phase *dnn is awesome*
OR	orange bike	Contain the term *orange* or *bike*, or both. **OR must be in uppercase**
	orange **OR** bike	
AND	+orange +bike	Contain both *orange* and *bike*
	orange **AND** bike	
Combo	(agile **OR** extreme) **AND** methodology	Contain *methodology* and must also contain *agile* and/or *extreme*.**AND must be in uppercase**

About the User Switcher

The User Switcher enables authorized users to impersonate the identity of any registered site user and identify what editing access different users have across the site, as well as manage their profile. Note: You cannot assume Super-User level accounts.

This module is located on the Host > Advanced Settings > User Switcher page and can be added to any site page.

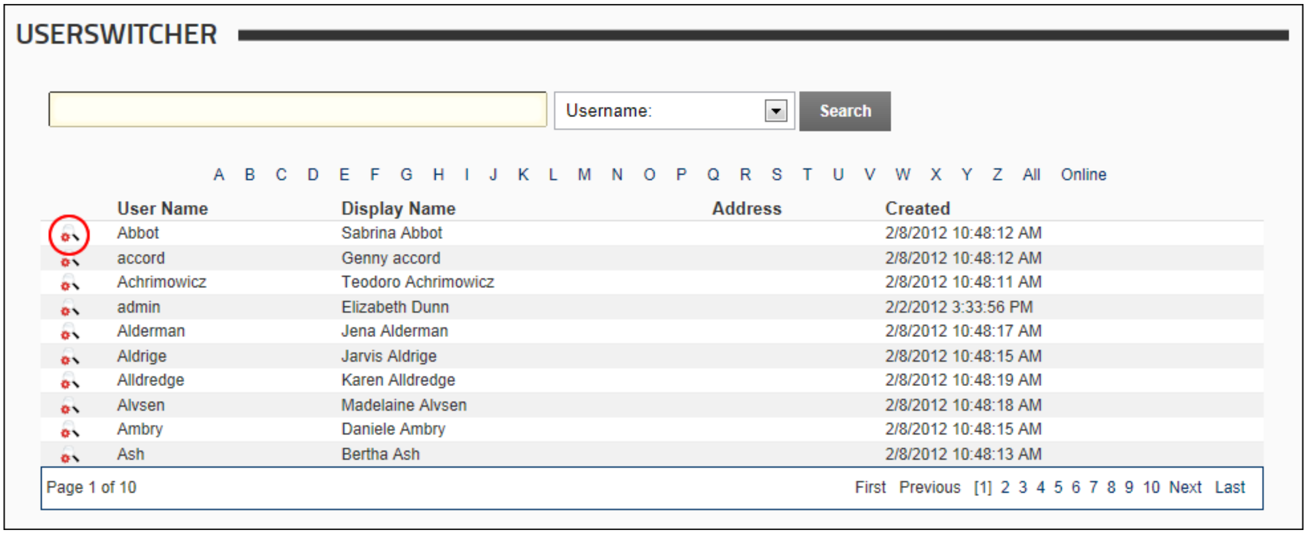


The User Switcher

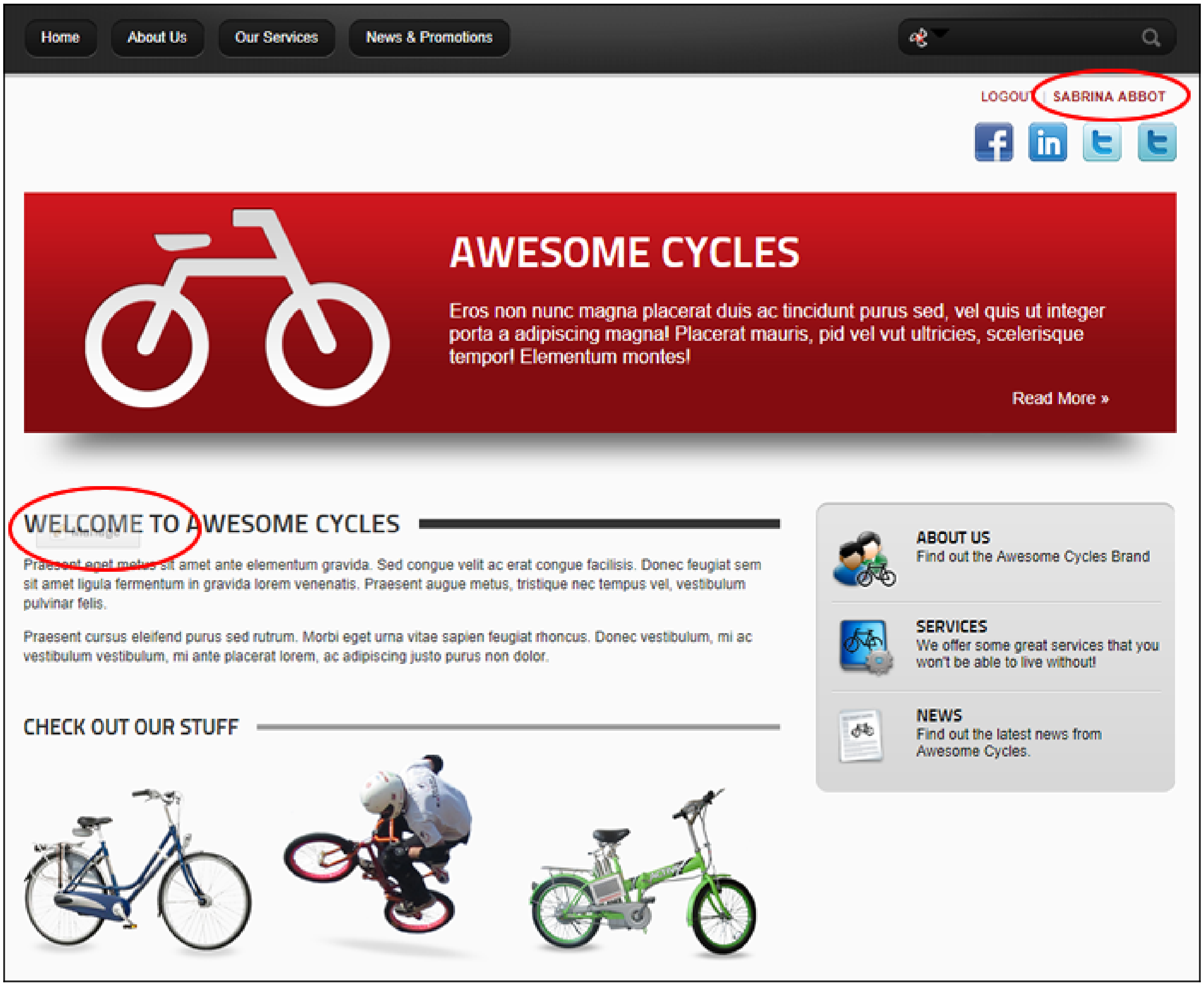
Impersonating a User

How to impersonate a user, excluding SuperUsers, using the User Switcher module. **Warning.** Any user with View access to this module can impersonate other users, regardless of other permission settings.

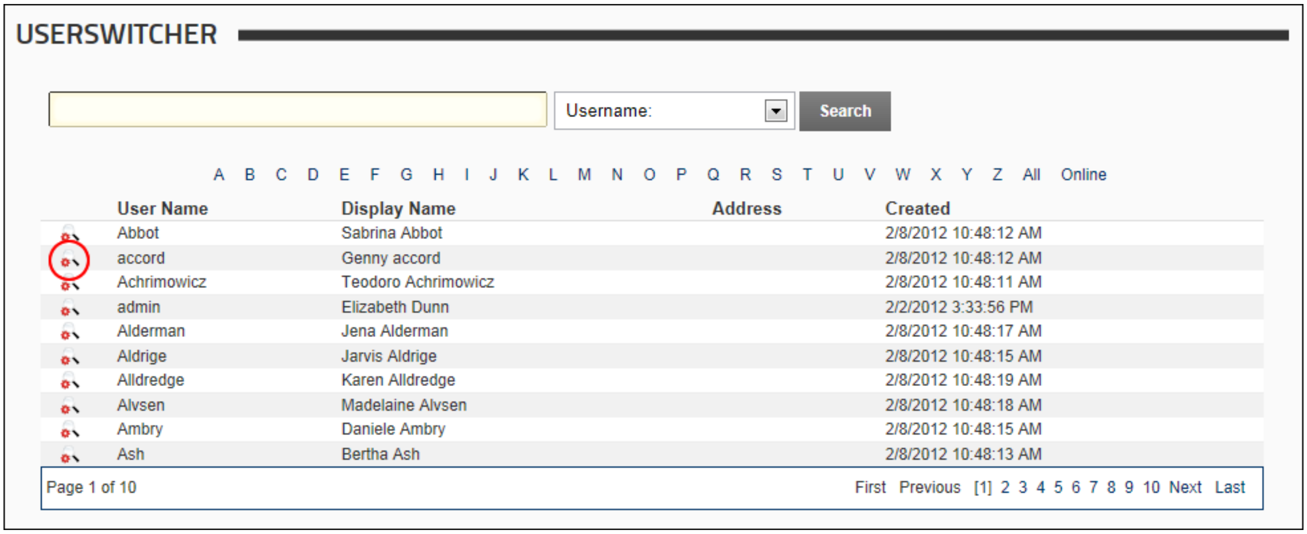
1. Navigate to Host > Advanced Settings > **User Switcher** - OR - Go to a User Switcher module.
2. Locate the user you want to impersonate. See User Account documentation which offers the same search and filter tools:
3. Click on the **Impersonate User** button. For example, in the below image, we will impersonate "Sabrina Abbot".



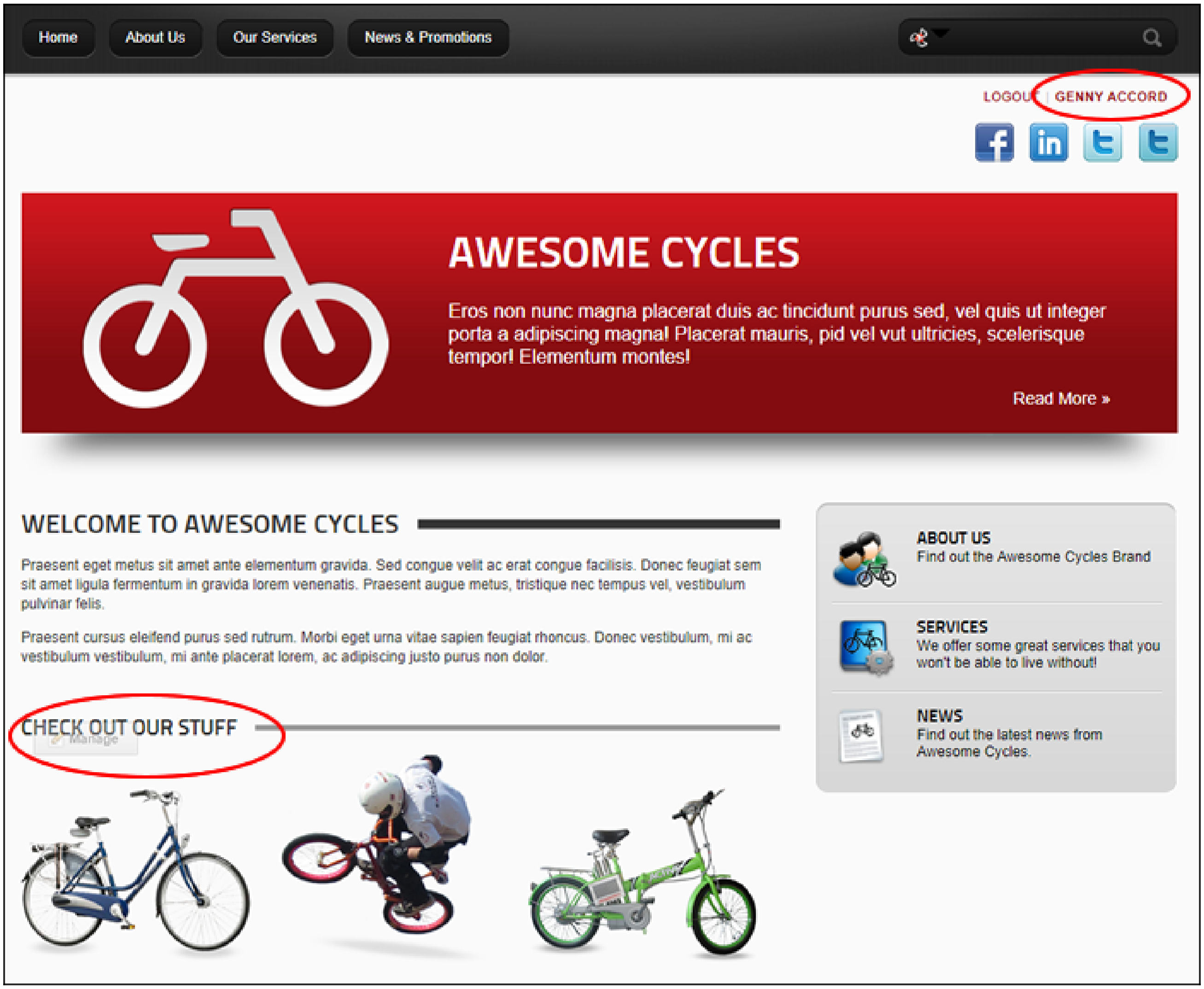
4. You are now logged in as the selected user. Note that if you were previously located on the Host > Advanced Settings > **User Switcher** page the Access Denied message will be displayed if the user you are impersonating isn't a SuperUser. In the below image, we are impersonating "Sabrina Abbot" and are viewing the Home page. Sabrina has been granted permission to edit the "Welcome To Awesome Cycles" module.



5. To impersonate another user, return to the User Switcher module and locate the next user you want to impersonate.
6. Click on the **Impersonate User** button. For example, in the below image, we will impersonate "Genny Accord".



7. You are now logged in as the selected user and are taken to the Home page of the site. In the below image, we are impersonating "Genny Accord" and are viewing the Home page. Genny has been granted permission to edit the "Check Out Our Stuff" module.


Home
About Us
Our Services
News & Promotions
LOGOUT | GENNY ACCORD
AWESOME CYCLES
Eros non nunc magna placerat duis ac tincidunt purus sed, vel quis ut integer porta a adipiscing magna! Placerat mauris, pid vel vut ultricies, scelerisque tempor! Elementum montes!
Read More »
WELCOME TO AWESOME CYCLES
Praesent eget metus sit amet ante elementum gravida. Sed congue velit ac erat congue facilisis. Donec feugiat sem sit amet ligula fermentum in gravida lorem venenatis. Praesent augue metus, tristique nec tempus vel, vestibulum pulvinar felis.
Praesent cursus eleifend purus sed rutrum. Morbi eget urna vitae sapien feugiat rhoncus. Donec vestibulum, mi ac vestibulum vestibulum, mi ante placerat lorem, ac adipiscing justo purus non dolor.
CHECK OUT OUR STUFF
Manage
ABOUT US
Find out the Awesome Cycles Brand
SERVICES
We offer some great services that you won't be able to live without!
NEWS
Find out the latest news from Awesome Cycles.

Site Management

About the Site Management Page

The Host > Site Management page allows the Host to create and maintain all sites within this DNN installation. In addition, this module allows the Host to generate a template from an existing site which can then be applied to an existing DNN site or can be selected when creating a new site.

The Site Management module displays a list of all existing sites including the following details of each:

- **Site Id**: The unique number of this site for this site. The ID of first site created is 0 (zero).
- **Site Title**: The Title of the site as set on the Admin > Site Settings page.
- **Site Aliases**: The http aliases for the site.
- **Users**: The number of Registered Users for the site.
- **Disk Space**: The amount of space in Megabytes (MB) allocated to the site.
- **Hosting Fee**: The monthly fee set for the site.
- **Expires**: The date when hosting for this site is set to expire.

What is the difference between a parent and child site?

- A parent site is associated with a unique URL (i.e. http://www.domain.com). This generally involves purchasing a Domain Name from an Internet Registrar, setting the Primary/Secondary DNS entries to point to the Hosting Providers DNS Server, and having your Hosting Provider map the Domain Name to the IP Address of your account. You can also use the IP Address of your site without a Domain Name (i.e. 65.174.86.217). If you need to have multiple Domain Names pointing to the same site then you can add multiple aliases in the site edit interface. Do not create a Parent Site until all of the DNS mappings are in place or else you will not be able to access your site.

- A child site is a subhost of your Hosting Provider account. This means a directory is created on the web server which allows the site to be accessed through a URL address which includes a Parent domain name as well as the directory name (I.e. www.domain.com/directory). A child site can be converted into a Parent Site at any time by simply modifying the Site Alias entry.

Note: Sites are created using the default setting as defined on the Host Settings module such as hosting fee, hosting space and site log history. Once a site has been created, these properties can be modified for individual sites.

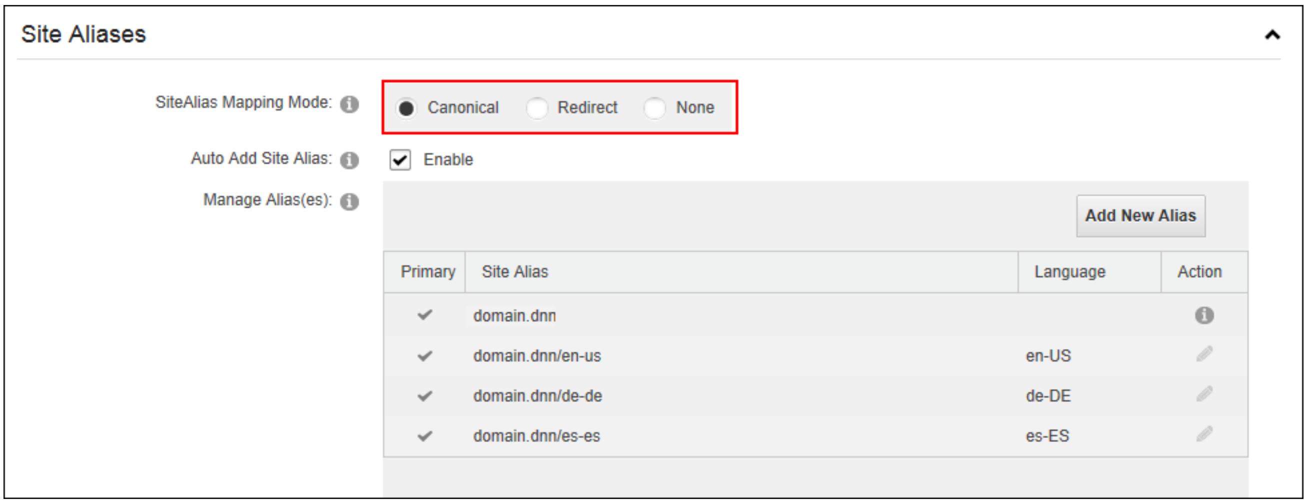
Site Aliases

Configuring Site Alias Settings

How to choose the site alias mapping mode and set the default alias for a site. Note: This setting is only effective in single site configuration only. Restricted to SuperUsers.

1. Navigate to Host > **Site Management** and then click on the **Edit** button beside the title of the required site to open the Edit Sites page - OR - Navigate to Admin > **Site Settings**.
2. Go to **Advanced Settings** > **Site Aliases**.
3. At **Site Alias Mapping Mode**, this mode is used to determine how to handle web sites that have multiple domains pointed at one IIS website. DNN will automatically add that site alias to its list. Select from these options:
   - **Canonical**: The new URL is automatically mapped but is handled as a Canonical URL. This adds a link element to the element of the page so that when an alias that is not the default is used to browse to the site it tells search engines to compile all the results into one alias (the canonical or default alias).
   - **Redirect**: The URL is automatically mapped but is redirected to the default alias and a permanent redirect (301) is sent to search engines.
   - **None**: Select if the new URL is not mapped. This setting will disable the automatic creation of Site Aliases. This is the default setting on upgrades.

4. The default alias is used in conjunction with the Site Alias Mapping Mode field. When the mode is set to Canonical then the default alias is used as the canonical alias for search engines; however when the mode is set to Redirect then the default alias is used as the permanent redirect. If either Canonical or Redirect modes have been selected above, you will need to choose the Primary alias. To change the primary alias:
    1. Click on the **Edit** button beside the alias to be set as primary.
    2. **Optional.** Select the **Primary** radio button.

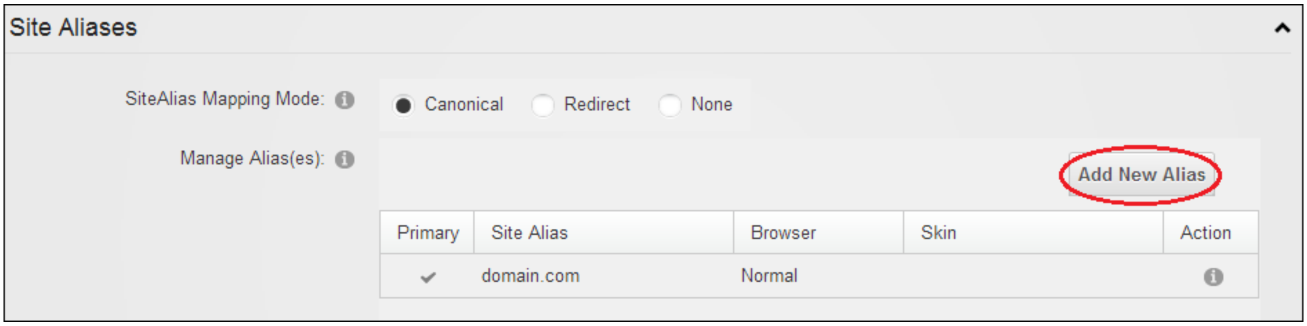


5. Click the **Update** button.

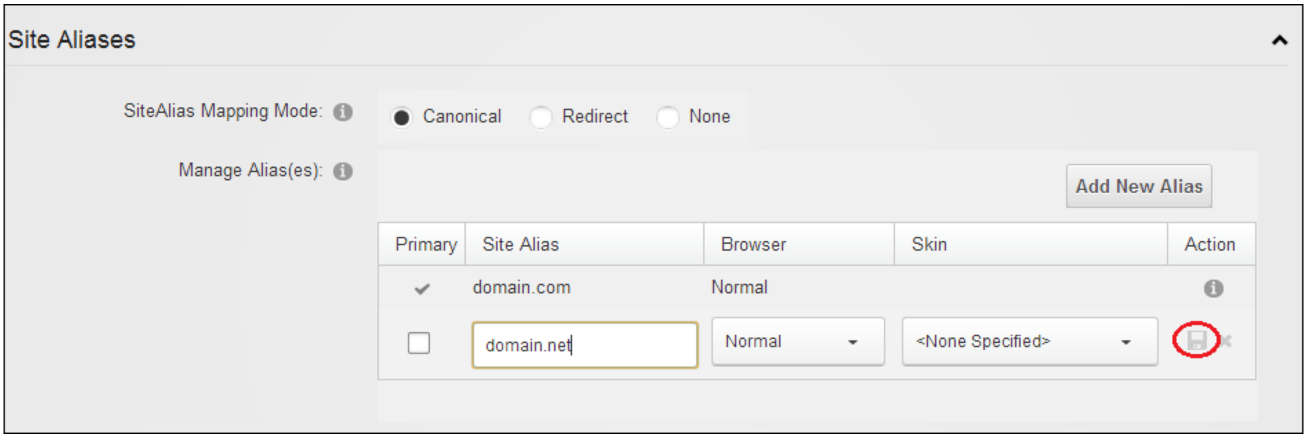
Adding a Site Alias

Evoq Content provides the ability to add and manage multiple domain names that can be used to navigate to a site. These domains could be a local address (i.e. local host), an IP address (i.e. 146.0.0.2), a full URL (i.e. www.-domain.com), or a server name (i.e. MYSERVER). Aliases created using Evoq Content can be customized for different browsers (e.g. mobile or normal) and a specific language and skin can be chosen.

1. Navigate to Host > **Site Management** and click the **Edit** button beside the title of the required site - OR - Navigate to Admin > **Site Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Site Aliases** section.
4. Click the **Add New Alias** button.



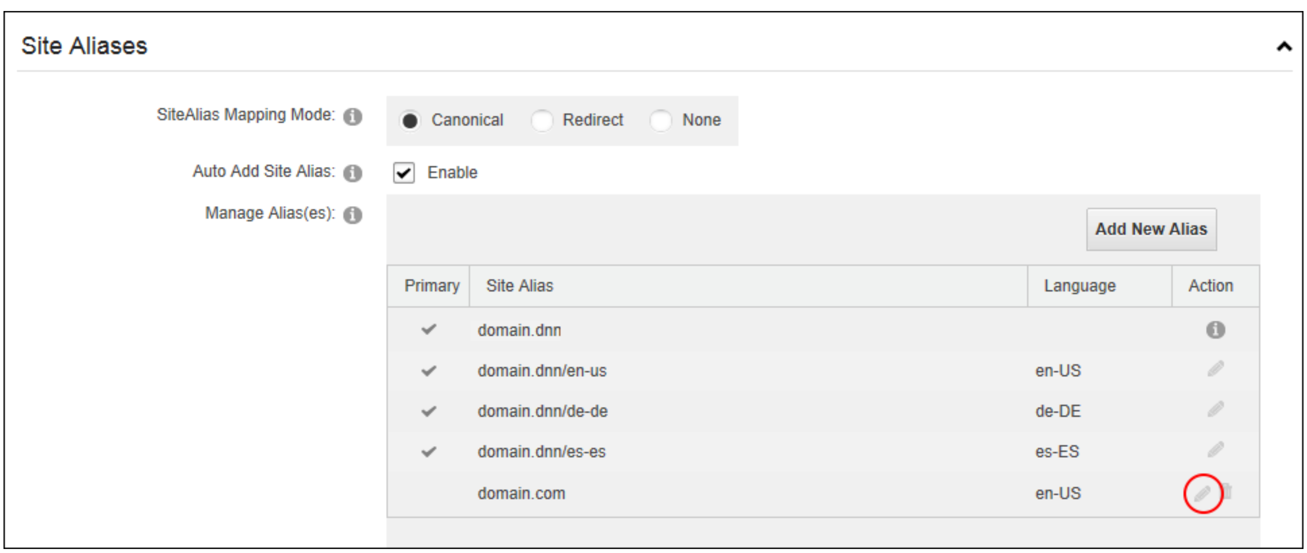
5. A new row is now displayed in the **Manage Alias(es)** table below the existing aliases.
6. **Optional.** Select the **Primary** radio button to set this new alias as the primary alias for this site. The default alias is used in conjunction with the "Site Alias Mapping Mode" field. When the mode is set to Canonical then the default alias is used as the canonical alias for search engines, however when the mode is set to Redirect then the default alias is used as the permanent redirect.
7. In the **Site Alias** column, enter the new alias into the text box without the `http://` protocol prefix. E.g. For a mobile device the alias could be mobile.domain.com, or for a German language site the alias could be domain.de
8. In the **Language** column, select the language associated with this alias. Prerequisite. A language must be installed and enabled on the site before it is displayed in the list.
9. In the **Browser** column, select the type of browser for this alias from these options:
   - **Normal**: Select if this alias will be browsed using a website browser. This is the default setting.
   - **Mobile**: Select if this alias will be viewed using a mobile device browser.
10. **Optional.** In the **Skin** column, select the skin to be used for this alias. E.g. Choose a mobile skin for a mobile website. If no skin is selected then the default skin set for the site will be used.
11. Click the **Save** button. The newly added site alias is now displayed in the HTTP Alias list.



Editing a Site Alias

How to edit site aliases (also known as HTTP aliases) that are used by DNN to identify sites when they are accessed by a web or mobile device browser. Restricted to SuperUsers.

1. Navigate to Host > **Site Management** and click the **Edit** button beside the title of the required site - OR - Navigate to Admin > **Site Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Site Aliases** section.
4. Click on the **Edit** button to the left of the HTTP Alias to be edited.

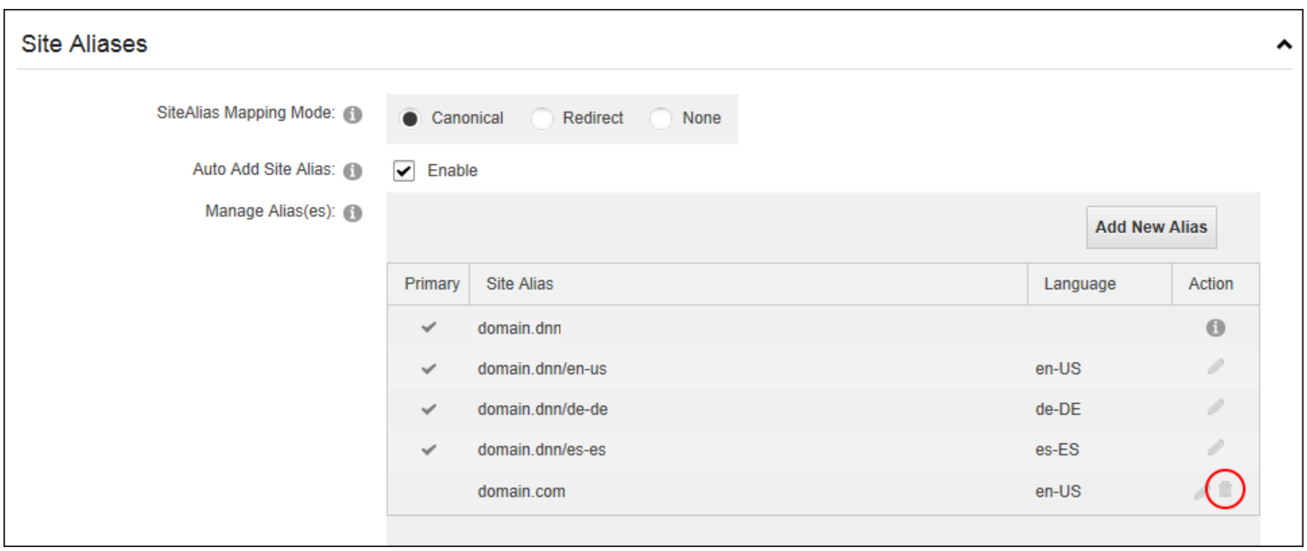


5. Edit one or more fields as required.
6. **Optional.** Select the **Primary** radio button to set this new alias as the primary alias for this site. The default alias is used in conjunction with the Site Alias Mapping Mode field. When the mode is set to Canonical then the default alias is used as the canonical alias for search engines, however when the mode is set to Redirect then the default alias is used as the permanent redirect.
7. Click the **Save** button to save your changes.

Deleting a Site Alias

How to delete a site alias, also known as a HTTP alias, from a site using the Site Alias module. Once an alias has been deleted, the name of the site alias can then be reused if required. Restricted to SuperUsers.

1. Navigate to Host > **Site Management** and click the **Edit** button beside the title of the required site - OR - Navigate to Admin > **Site Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Site Aliases** section.
4. In the **Manage Alias(es)** list, click the **Delete** button beside the alias to be deleted. This displays the message "Are You Sure You Wish To Delete This Item?"



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

Performance and Scalability

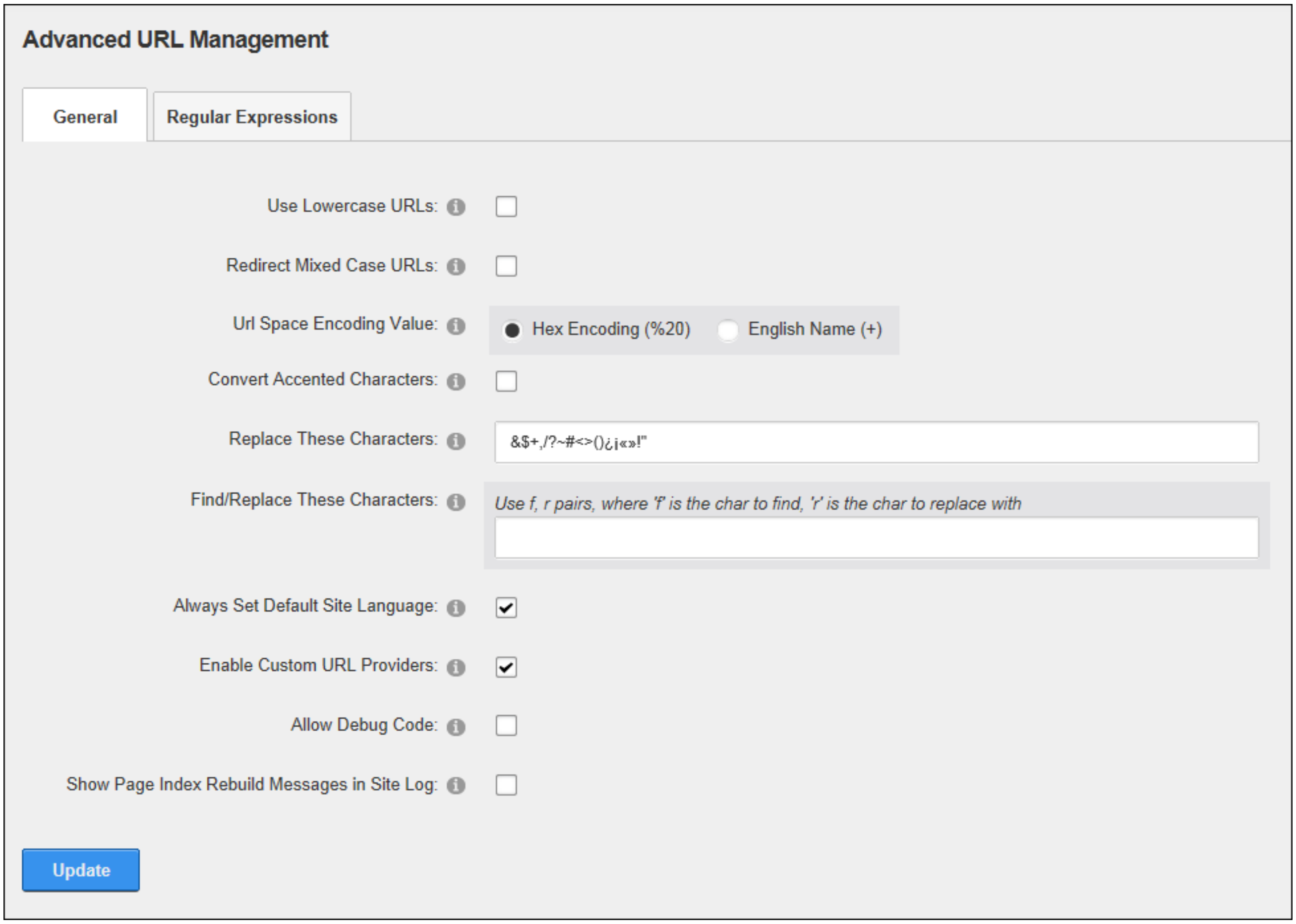
This section details the Evoq Content tools available to maximize the performance and scalability of your site.

Advanced URL Management

All Sites

About Advanced URL Management

The Advanced URL Management module that is located on the Host > Advanced Settings > Advanced URL Management page allows authorized users to manage application wide settings that control the format of URLs for all sites within this installation. This module contains two tabs that allow SuperUsers to set General URL formatting and Regular Expressions rules for URLs. A separate version of this module which provides Administrators with URL management tools for their site is located on the Admin > Advanced Settings > Advanced URL Management page.



Managing General URL Settings for all Sites

How to configure the general setting for URL's across all sites within this DNN installation. Note: These settings can be overridden for individual sites. . Authenticated users must be granted view rights to the page where the module is located.

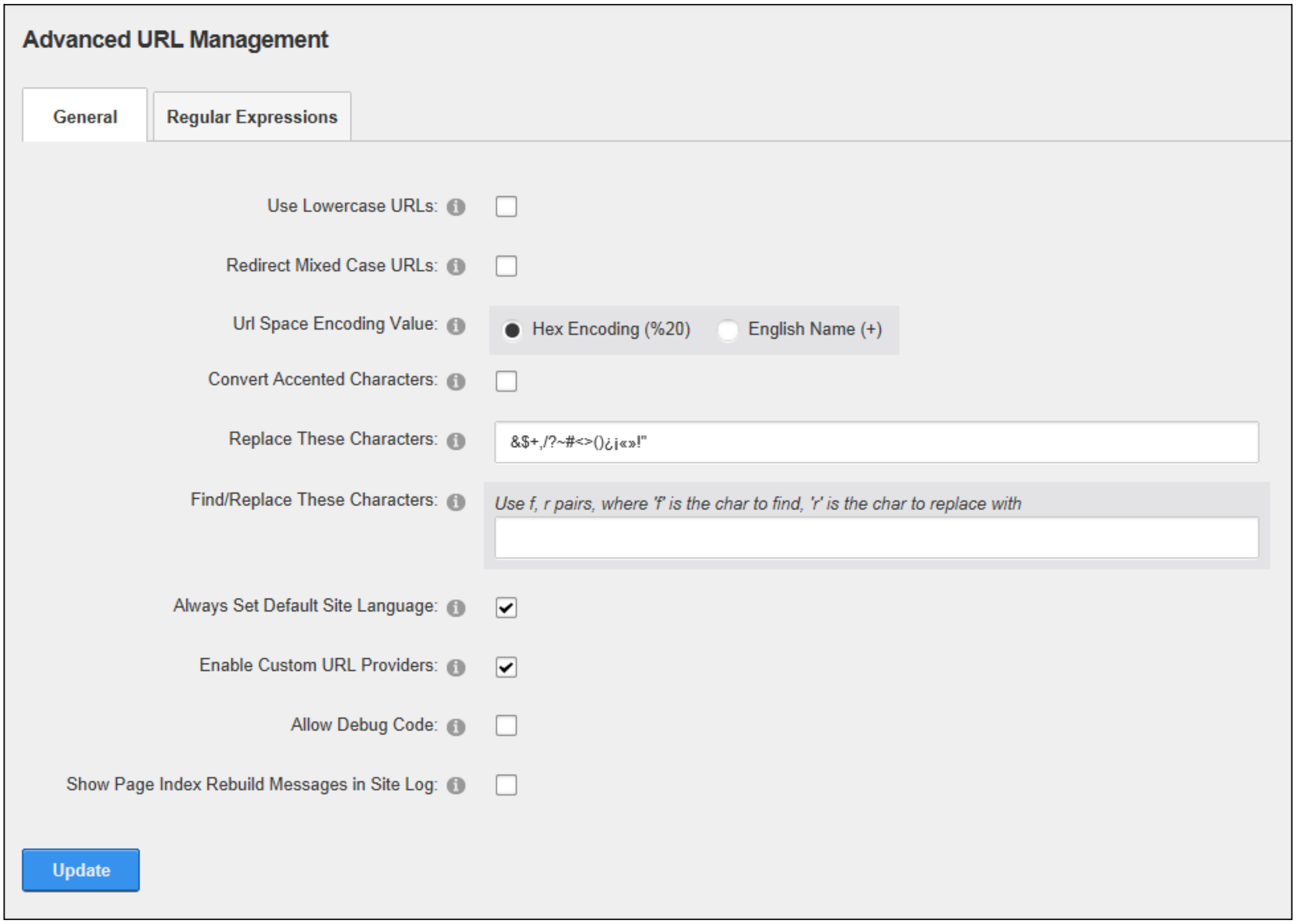
1. Navigate to Host > Advanced Settings > **Advanced URL Management**.
2. At **Use Lowercase URL's**, select from these options:
   - Mark the check box to convert mixed case URL's to lowercase only. E.g. domain.com/Our-Products would redirect users to domain.com/our-products.
     1. At **Redirect Mixed Case URL's**, mark the check box to redirect any mixed case URL's to a lowercase URL. E.g. domain.com/Our-Products would redirect site visitors to domain.com/our-

products. Note: You should only activate this option when "Use Lowercase URL's" is enabled. - OR - unmark the check box for no redirection.

- Unmark the check box to use mixed case URL's as they are enter in the Page URL field (or in the Page Name field if the Page URL field is left blank). E.g. domain.com/Our-Products

3. At **URL Space Encoding Value**, select the way spaces are displayed in generated URL paths from these following options:
   - **Hex Encoding (%20)**: Select to display spaces in URL's as %20. E.g. domain.com/our%20latest%20products
   - **English Name (+)**: Select to display spaces in URL's as a plus sign (+). E.g. domain.com/our+latest+products
4. At **Convert Accented Characters**, mark the check box to convert any accented (diacritic) characters to their plain-ascii equivalent. E.g. café would be converted to cafe - OR - unmark the check box to use accented characters in URL's. In this case, the accented characters will be URL-encoded in the resulting URL. E.g. In the case of café - it will come out as http://example.com/caf%C3%A9
5. In the **Replace These Characters** text box, enter any additional characters that will be replaced with the configured 'replacement' character which will be either - (i.e. the dash character) or _ (i.e. the underscore character) when they appear in the page name. To stop any character from being replaced, remove it from the list. To view or change the replacement character set for this site.
6. In the **Find/Replace These Characters** text box, enter the character that you want to be replaced in a URL followed by a comma and then the replacement character. E.g. entering f,r will find any 'f' in a URL and replace it with 'r'. This can be used for replacing 'æ' with 'ae' and similar. Separate each find,replace set of characters with a semi-colon (;). Note: This setting only applies to Page and User Profile URL's and any URL's controlled through URL providers. You can only replace single characters - the 'find' character can only be a single value, while the 'replace' can be a string of one or more characters.
7. At **Always Set Default Site Language**, mark the check box to include the default language for the site in the URL. E.g. domain.com/about-us will be rewritten to the server as domain.com/default.aspx?tadib-59=en-US. The appended language information is used when the URL is rewritten to the server and is not display to visitors in the site URL's. - OR - mark the check box to remove the default site language from the URL. E.g. domain.com/about-us will be rewritten to the server as domain.com/default.aspx?tadib-59

8. At **Warn in Log About Duplicate URL's**, mark the check box to report duplicate URL's in the Log viewer module which is located on the Admin > Event Viewer page. The system will choose which of the duplicate URL's to show. This is the default setting. - OR - unmark the check box to disable logging of duplicate events and prevent the log filling up. In most cases the in-built validation on page creation will prevent the creation of a duplicate URL, but it can still happen. Best practice is to switch it on, restart the site and check the log for any duplicate URL messages.
9. At **Enable Custom URL Providers**, mark the check box to enable custom URL Provider functionality for all sites. This is the default setting. - OR - unmark the check box to disable all custom URL providers.
10. At **Allow Debug Code**, mark the check box to allow DNN support or your support provider to assist with debugging of your site by adding a special code to a URL and then requesting that code from the server where the DNN application is hosted. This enables your support team to access the required information to assist with debugging the rewritten page URL. This functionality is typically enabled when requested by your support provider and then disabled once debugging has finished. - OR - unmark the check box to disable debug mode.
11. At **Show Page Index Rebuild Messages in Site Log**, mark the check box to record each rebuild of the page URL index for the site in the Log Viewer located on the Admin > Event Log page. Use this feature to determine the cache usage for the Page URL index. This diagnostic tool is typically enabled when requested by your support provider and then disabled once debugging has finished. - OR - unmark the check box to disable this feature.



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

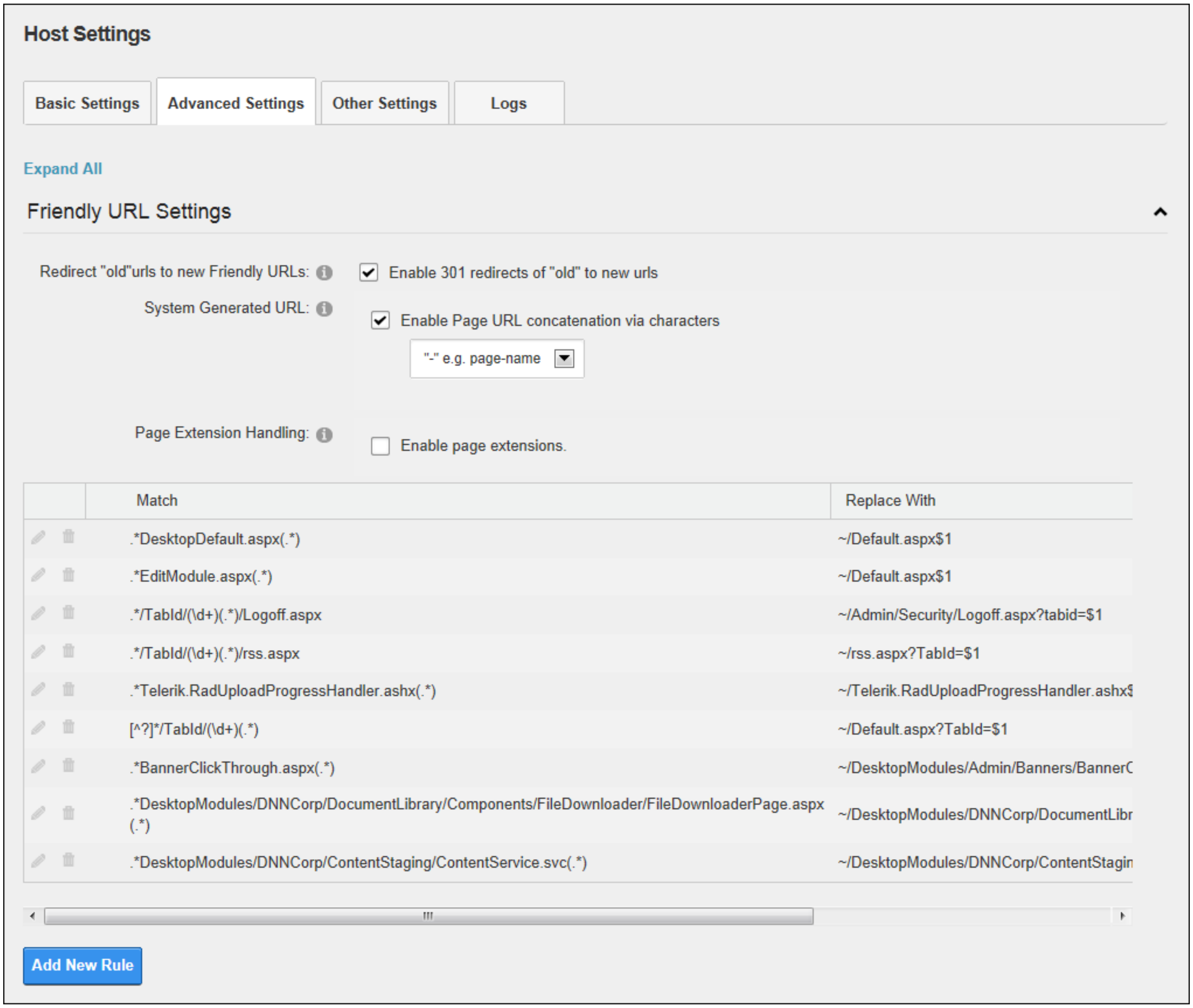
Managing URL Settings for all Sites

How to configure the default handling of URL's across all sites in this DNN installation. These settings can be over-ridden for individual sites. See "Managing URL Settings for this Site"

1. Navigate to Host > **Host Settings**.
2. Select the **Advanced Settings** tab.
3. Expand the **Friendly URL Settings** section.
4. At **Redirect "old" URL's to new Friendly URL's**, at **Enable 301 redirects of "old" to new URL's** redirect any requests for old URL formats to the new friendly URL format. E.g. If a user entered an "old" URL format to the Getting Started page such as domain.com/default.aspx?tabid=57,

domain.com/home/tabid/57/default.aspx, or domain.com/gettingstarted.aspx, they would be redirect to the new friendly URL of domain.com instead.- OR - unmark ☐ the check box to disable.

5. At **System Generated URL**, select from these options:
   - Mark ☑ the check box at **Enable Page URL concatenation via characters** to enable URL concatenation in URLs.
     1. Select either **"-"** or **"_"**. E.g. This would change the URL domain.com/Our Products to domain.-com/Our-Products or domain.com/Our_Products
   - Unmark ☐ the check box to disable concatenation.
6. At **Page Extension Handling**, select from the following options:
   - Mark ☑ the check box at **Enable page extensions** to customize the page extension.
     1. Enter the extension to be used into the text box. The default extension is .aspx.
   - Unmark ☐ the check box at **Enable page extensions** to use the default page extension of .aspx.



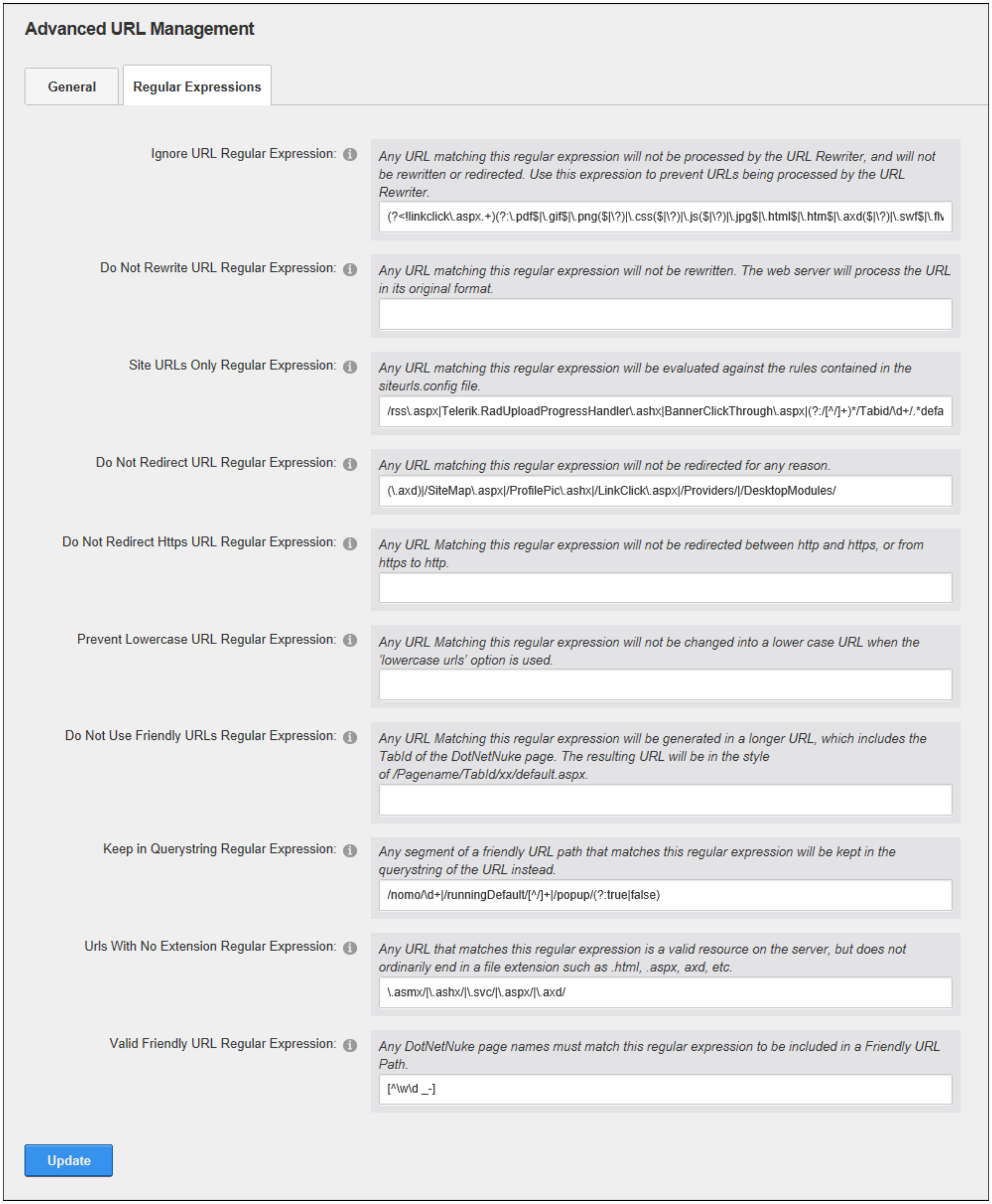
7. Click the **OK** button to confirm.

Managing URL Regular Expressions for all Sites

The Regular Expressions are used to fine-tune the operation of the Advanced URL Rewriting and Friendly URL Generation. They should only be modified either under instruction from DNN Support or another experienced person. It is possible to cause the DNN installation to stop working through incorrect changes to the Regular Expressions. It is recommended to take a backup prior to changing any of the Regular Expressions. Note: These settings can be overridden for individual sites, See "Managing URL Regular Expressions for this Site"

Note: If human friendly URLs are enabled for this site, you will need to put the site into advanced mode before the changes made on this page take effect. If this is the case, a warning message advising you to do this will be displayed at the top of this page and will provide you with a link to the how to Wiki page at www.dnnsoftware.com/Resources/Wiki/Page/Activating-Advanced-Url-Management.

1. Navigate to Host > Advanced Settings > **Advanced URL Management**.
2. Select the **Regular Expressions** tab.


Advanced URL Management
General
Regular Expressions
Ignore URL Regular Expression:
Any URL matching this regular expression will not be processed by the URL Rewriter, and will not be rewritten or redirected. Use this expression to prevent URLs being processed by the URL Rewriter.
(?<!linkclick\.aspx.+)(?:\.pdf$|\.gif$|\.png($|\?)|\.css($|\?)|\.js($|\?)|\.jpg$|\.html$|\.htm$|\.axd($|\?)|\.swf$|\.fl
Do Not Rewrite URL Regular Expression:
Any URL matching this regular expression will not be rewritten. The web server will process the URL in its original format.
Site URLs Only Regular Expression:
Any URL matching this regular expression will be evaluated against the rules contained in the siteurls.config file.
/rss\.aspx|Telerik.RadUploadProgressHandler\.ashx|BannerClickThrough\.aspx|(?:/[^/]+)*/Tabid/\d+/.*defa
Do Not Redirect URL Regular Expression:
Any URL matching this regular expression will not be redirected for any reason.
(\.axd)|/SiteMap\.aspx|/ProfilePic\.ashx|/LinkClick\.aspx|/Providers/|/DesktopModules/
Do Not Redirect Https URL Regular Expression:
Any URL Matching this regular expression will not be redirected between http and https, or from https to http.
Prevent Lowercase URL Regular Expression:
Any URL Matching this regular expression will not be changed into a lower case URL when the 'lowercase urls' option is used.
Do Not Use Friendly URLs Regular Expression:
Any URL Matching this regular expression will be generated in a longer URL, which includes the TabId of the DotNetNuke page. The resulting URL will be in the style of /Pagename/TabId/xx/default.aspx.
Keep in Querystring Regular Expression:
Any segment of a friendly URL path that matches this regular expression will be kept in the querystring of the URL instead.
/nomo/\d+|/runningDefault/[^/]+|/popup/(?:true|false)
Urls With No Extension Regular Expression:
Any URL that matches this regular expression is a valid resource on the server, but does not ordinarily end in a file extension such as .html, .aspx, axd, etc.
\.asmx/|\.ashx/|\.svc/|\.aspx/|\.axd/
Valid Friendly URL Regular Expression:
Any DotNetNuke page names must match this regular expression to be included in a Friendly URL Path.
[^\w\d _-]
Update

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

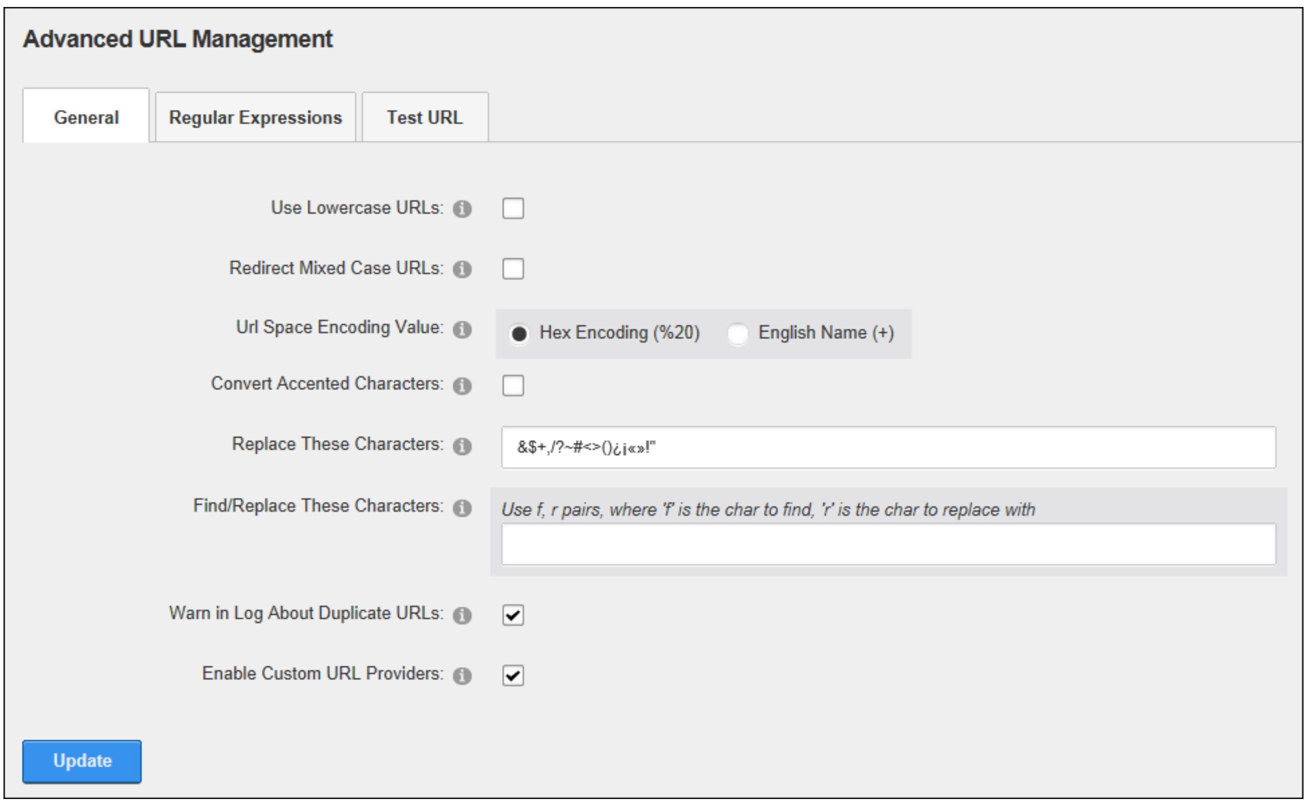
Current Site

About Advanced URL Management

The Advanced URL Management module that is located on the Admin > Advanced Settings > Advanced URL Management page allows authorized users to manage site wide settings that control the format of URL's for the site. The Advanced URL Management module contains three tabs that allow Administrators to set General URL formatting, Regular Expressions and to Test URL's.

A separate version of this module which provides Administrators with URL management tools for their site is located on the Host > Advanced Settings > Advanced URL Management page.

Installation Note: This module is pre-installed on your site and can be added to site pages.



Related Topics:

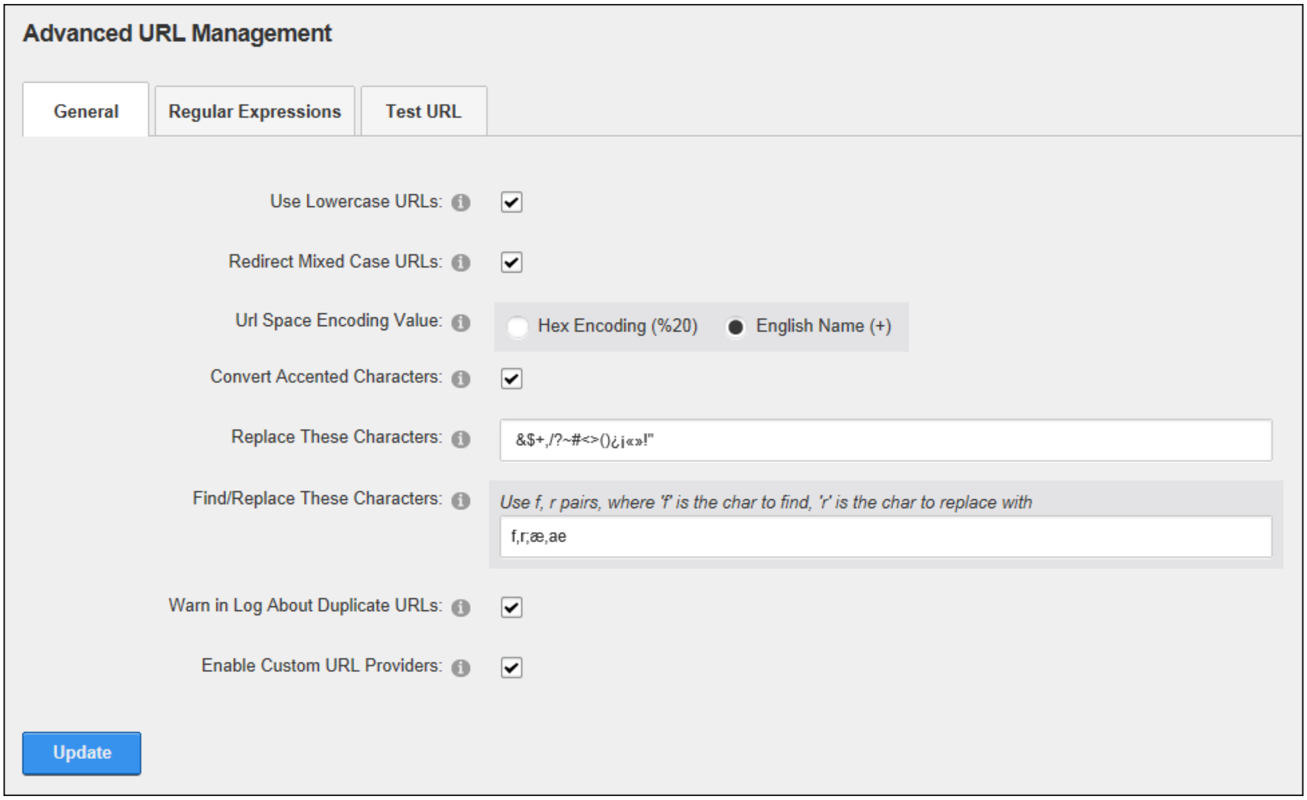
- See "Managing General URL Settings for this Site"
- See "Managing URL Regular Expressions for this Site"
- See "Testing a Page URL"

Managing General URL Settings for this Site

How to configure the general setting for URL's on this site. Note: These settings override the default settings configured for all sites within this DNN application (See "Managing General URL Settings for all Sites"). Restricted to Administrators only.

1. Navigate to Admin > Advanced Settings > **Advanced URL Management**.
2. Select the **General** tab.
3. At **Use Lowercase URL's**, select from these options:
   - Mark the check box to convert mixed case URL's to lowercase only. E.g. domain.com/Our-Products would redirect users to domain.com/our-products.
     1. At **Redirect Mixed Case URL's**, mark the check box to redirect any mixed case URL's to a lowercase URL. E.g. domain.com/Our-Products would redirect site visitors to domain.com/our-products. Note: You should only activate this option when "Use Lowercase URL's" is enabled - OR - unmark the check box for no redirection.
   - Unmark the check box to use mixed case URL's as they are enter in the Page URL field (or in the Page Name field if the Page URL field is left blank). E.g. domain.com/Our-Products
4. At **URL Space Encoding Value**, select the way spaces are displayed in generated URL paths from these following options:
   - **Hex Encoding (%20)**: Select to display spaces in URL's as %20. E.g. domain.-com/our%20latest%20products
   - **English Name (+)**: Select to display spaces in URL's as a plus sign (+). E.g. domain.-com/our+latest+products
5. At **Convert Accented Characters**, mark the check box to convert any accented (diacritic) characters to their plain-ascii equivalent. E.g. café would be converted to cafe - OR - unmark the check box to use accented characters in URL's. In this case, the accented characters will be URL-encoded in the resulting URL. E.g. In the case of café – it will come out as http://example.com/caf%C3%A9

6. In the **Replace These Characters** text box, enter any additional characters that will be replaced with the configured ‘replacement’ character that will either be - (i.e. the dash character) or _ (i.e. the underscore character) when they appear in the page name. To stop any character from being replaced, remove it from the list. To view or change the replacement character set for this site,
7. In the **Find/Replace These Characters** text box, enter the character that you want to be replaced in a URL followed by a comma and then the replacement character. E.g. entering f,r will find any ‘f’ in a URL and replace it with ‘r’. This can be used for replacing 'æ' with ‘ae’ and similar. Separate each find,replace set of characters with a semi-colon (;). Note: This setting only applies to Page and User Profile URL's and any URL's controlled through URL providers. You can only replace single characters - the 'find' character can only be a single value, while the 'replace' can be a string of one or more characters.
8. At **Warn in Log About Duplicate URL's**, mark ☑ the check box to report duplicate URL's in the Log viewer module which is located on the Admin > Event Viewer page. The system will choose which of the duplicate URL's to show. This is the default setting - OR - unmark ☐ the check box to disable logging of duplicate events and prevent the log filling up. In most cases the in-built validation on page creation will prevent the creation of a duplicate URL, but it can still happen. Best practice is to switch it on, restart the site and check the log for any duplicate URL messages.
9. At **Enable Custom URL Providers**, mark ☑ the check box to enable custom URL Provider functionality for this site. . This is the default setting. - OR - unmark ☐ the check box to disable all custom URL providers.



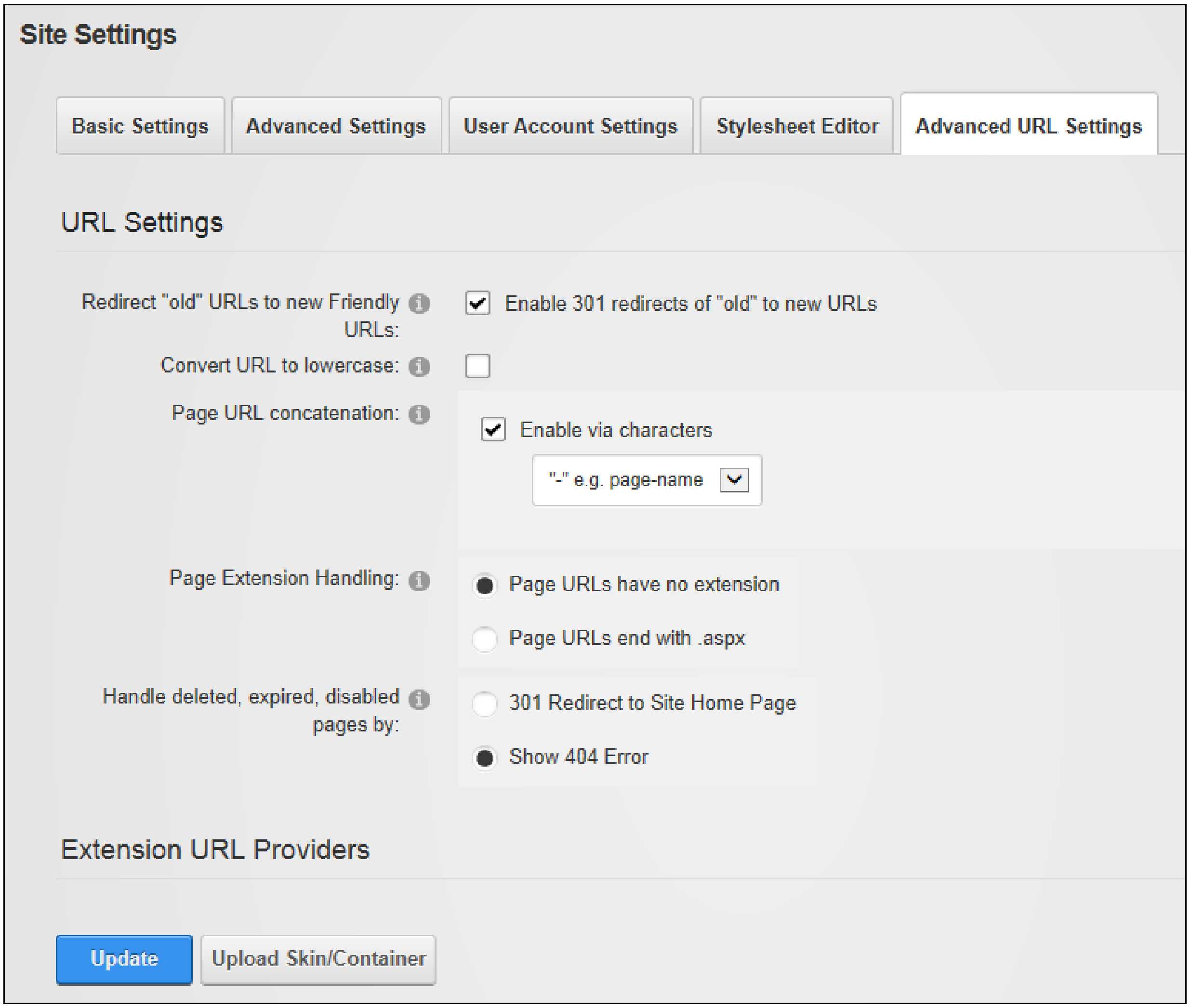
10. Click the **Update** button.

Managing URL Settings for this Site

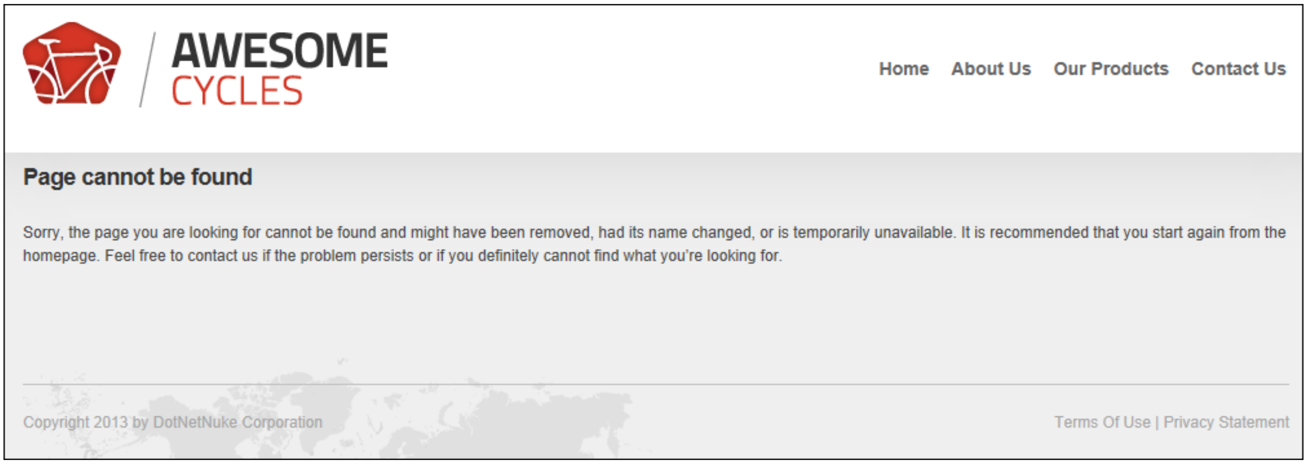
How to configure the way URL's are managed on the site. Note: This is the same setting as the "Use Lowercase URL's" field displayed on the Admin > Advanced Settings > Advanced URL Settings page.

1. Navigate to Admin > **Site Settings**.
2. Select the **Advanced URL Settings** tab.
3. Expand the **URL Settings** section.
4. At **Redirect "old" URL's to new Friendly URL's**, check the **Enable 301 redirects of "old" to new URL's** check box to redirect any requests for old URL formats to the new friendly URL format. E.g. If a user entered an "old" URL format to the Getting Started page such as domain.com/default.aspx?tabid=57, domain.-com/home/tabid/57/default.aspx, or domain.com/gettingstarted.aspx, they would be redirect to the new friendly URL of domain.com instead.- OR - unmark the check box to disable.

5. At **Convert URL to Lowercase**, mark the check box to change mixed case URL's to lowercase only. E.g. domain.com/Our-Products would become domain.com/our-products - OR - unmark the check box to use mixed case URL's. E.g. domain.com/Our-Products
6. At **Page URL concatenation**, select from these options:
   - Mark the check box at **Enable via characters** to enable URL concatenation.
     1. Select either **"-"** or **"_"**. E.g. This would change the URL domain.com/Our Products to domain.-com/Our-Products or domain.com/Our_Products
   - Unmark the check box at **Enable via characters** to disable concatenation.
7. At **Page Extension Handling**, select **Page URLs have no extension** for URLs such as http://-domain.com/aboutus - OR - **Page URLs end with .aspx** for URLs such as http://domain.com/aboutus.aspx.
8. Unmark the check box at **Enable page extensions** to use the default page extension of .aspx
9. At **Handle deleted, expired, disabled pages by**, select what happens when a user lands on a deleted, expired or disabled page from these options:
   - **301 Redirect to Site Home Page**: Select to use a redirect the user to the site's Home page.
   - **Show 404 Error**: Select to redirect the user to the page called "404 Error Page" that is unique to this site.



10. Click the **Update** button.

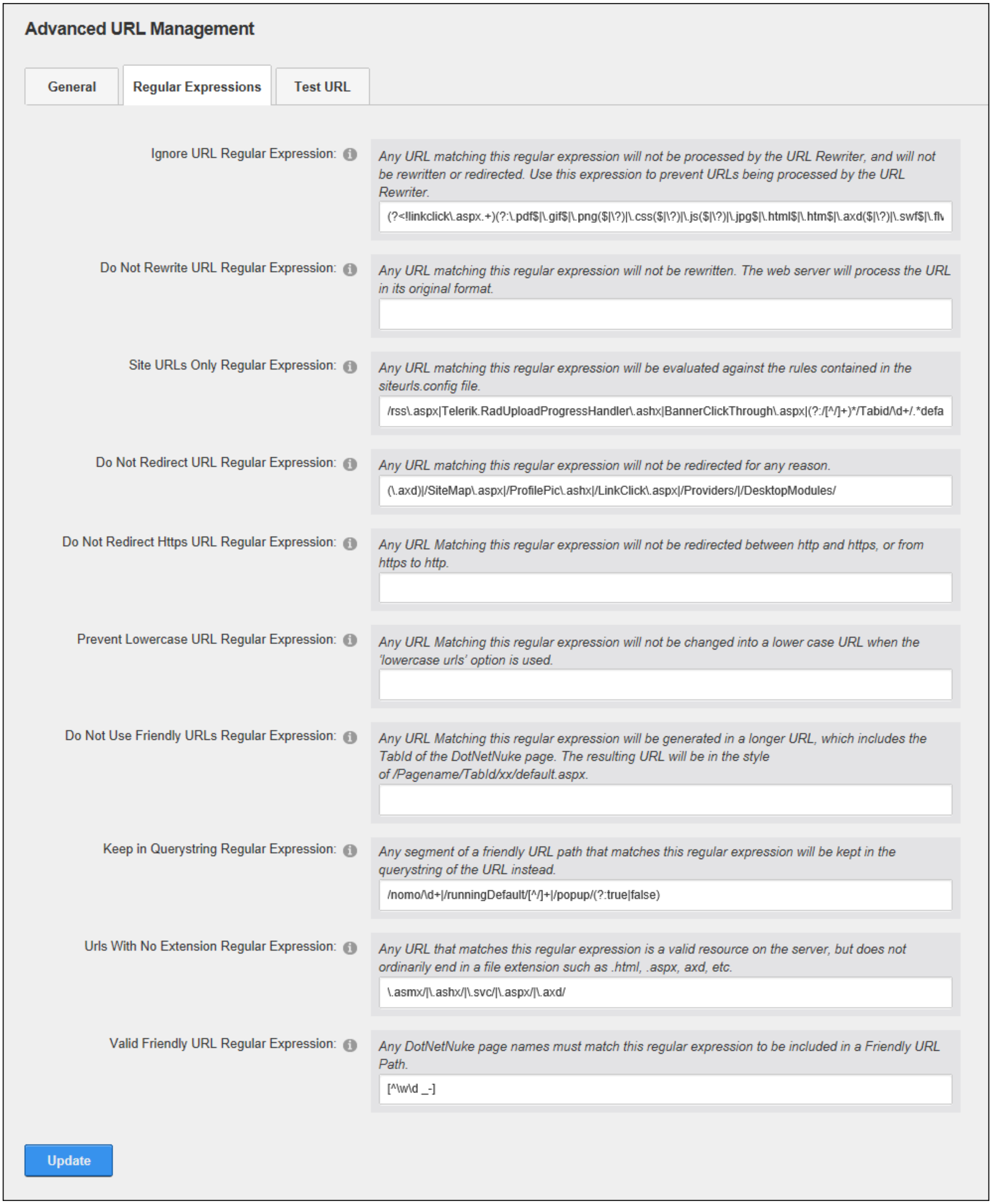


The default 404 page included with DNN

Managing URL Regular Expressions for this Site

How to fine tune the regular expressions for URL's on this site. The Regular Expressions are used to fine-tune the operation of the Advanced URL Rewriting and Friendly URL Generation. They should only be modified either under instruction from DNN Support or another experienced person. It is possible to cause the DNN installation to stop working through incorrect changes to the Regular Expressions. It is recommended to take a backup prior to changing any of the Regular Expressions. Note: These settings override the default settings configured for all sites within this application, See "Managing URL Regular Expressions for all Sites". If this module is added to a site page, authenticated users must be granted view rights to the page.

1. Navigate to Admin > Advanced Settings > **Advanced URL Management**.
2. Select the **Regular Expressions** tab.

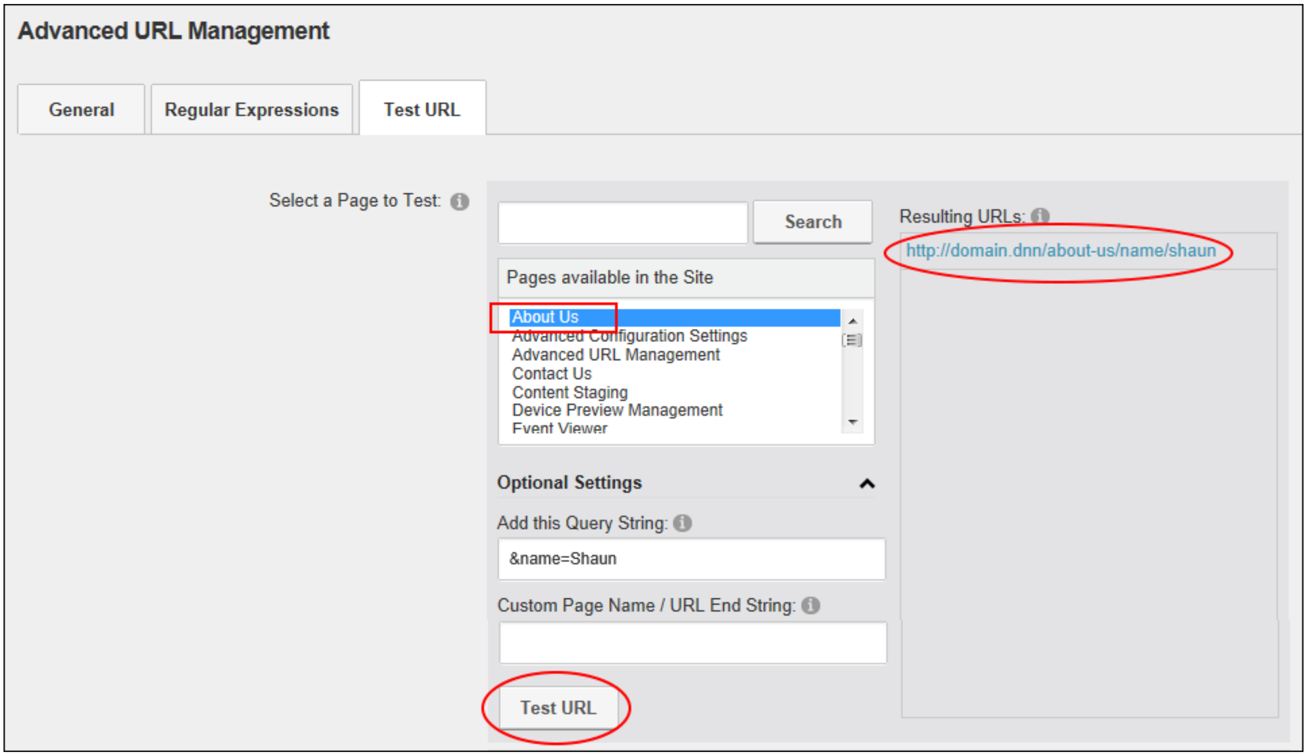

Advanced URL Management
General
Regular Expressions
Test URL
Ignore URL Regular Expression:
Any URL matching this regular expression will not be processed by the URL Rewriter, and will not be rewritten or redirected. Use this expression to prevent URLs being processed by the URL Rewriter.
(?<!linkclick\.aspx.+)(?:\.pdf$|\.gif$|\.png($|\?)|\.css($|\?)|\.js($|\?)|\.jpg$|\.html$|\.htm$|\.axd($|\?)|\.swf$|\.flv
Do Not Rewrite URL Regular Expression:
Any URL matching this regular expression will not be rewritten. The web server will process the URL in its original format.
Site URLs Only Regular Expression:
Any URL matching this regular expression will be evaluated against the rules contained in the siteurls.config file.
/rss\.aspx|Telerik.RadUploadProgressHandler\.ashx|BannerClickThrough\.aspx|(?:/[^/]+)*/Tabid/\d+/.*defa
Do Not Redirect URL Regular Expression:
Any URL matching this regular expression will not be redirected for any reason.
(\.axd)|/SiteMap\.aspx|/ProfilePic\.ashx|/LinkClick\.aspx|/Providers/|/DesktopModules/
Do Not Redirect Https URL Regular Expression:
Any URL Matching this regular expression will not be redirected between http and https, or from https to http.
Prevent Lowercase URL Regular Expression:
Any URL Matching this regular expression will not be changed into a lower case URL when the 'lowercase urls' option is used.
Do Not Use Friendly URLs Regular Expression:
Any URL Matching this regular expression will be generated in a longer URL, which includes the TabId of the DotNetNuke page. The resulting URL will be in the style of /Pagename/TabId/xx/default.aspx.
Keep in Querystring Regular Expression:
Any segment of a friendly URL path that matches this regular expression will be kept in the querystring of the URL instead.
/nomo/\d+|/runningDefault/[^/]+|/popup/(?:true|false)
Urls With No Extension Regular Expression:
Any URL that matches this regular expression is a valid resource on the server, but does not ordinarily end in a file extension such as .html, .aspx, axd, etc.
\.asmx/|\.ashx/|\.svc/|\.aspx/|\.axd/
Valid Friendly URL Regular Expression:
Any DotNetNuke page names must match this regular expression to be included in a Friendly URL Path.
[^\w\d _-]
Update

3. Click the **Update** button.

Testing a Page URL

How to view the exact URL for a page to see how it appears to site users. This tool provides an easy way to view URLs following changes to URL settings such as those on the General tab of the Advanced URL Management module without the need to navigate to individual pages. E.g. In the below example the page About Us has been selected and an optional querystring has been added. The test results show how the URL will look once the URL settings that have been configured for the site (in this example both "Convert URL to Lowercase" and "Page URL concatenation" settings are enabled See "Managing URL Settings for this Site") are applied to the URL. If this module is added to a site page, authenticated users must be granted view rights to the page.

1. Navigate to Admin > Advanced Settings > **Advanced URL Management**.
2. Select the **Test URL** tab.
3. At **Select a Page to Test**, select a page from the **Pages available in the Site** list. You can filter the pages displayed in the list by entering all or part of a page name into the text box displayed above the pages list and then clicking the **Search** button.
4. **Optional.** In the **Optional Settings** section complete any of the following:
   1. In the **Add this Query String** text box, enter the path information in the form of a querystring to generate a URL. E.g. entering &key=value will change the generated URL to include/key/value in the URL path. Use this feature to test out the example URL's generated by third party URL's.
   2. In the **Custom Page Name / URL End String** text box, enter the value for the ‘pagename’ value that is used when generating the URL for a module that generates a friendly URL by defining the last part of the URL explicitly. Leave this field blank if you have no explicit value.
5. Click the **Test URL** button. This displays the URL in the Resulting URL's list to the right.



6. **Optional.** To test this URL, See "Testing URL Rewriting"

Testing URL Rewriting

The Testing URL Rewriting section allows Administrators to change settings and test the results before they are actually applied helps in building confidence in the interface and site, before anything is actually changed. This is similar to content previews, and is a very useful tool for newer users and power users alike. The Test URL rewriting, redirecting and replacing functions are UI based, and use the unit testing hooks within the code to allow a mock request to be made, but one that doesn't actually involve a proper web request. This makes it easy to test any new settings. If this module is added to a site page, then authenticated users must be granted view rights to the page where the module is located.

1. Navigate to Admin > Advanced Settings > **Advanced URL Management**.
2. Select the **Test URL** tab.
3. Locate the page to be rewritten by completing Steps 3-5 of See "Testing a Page URL".
4. Click on the link displayed below **Resulting URLs**. This display the URL in the **Test URL Rewriting** field below.

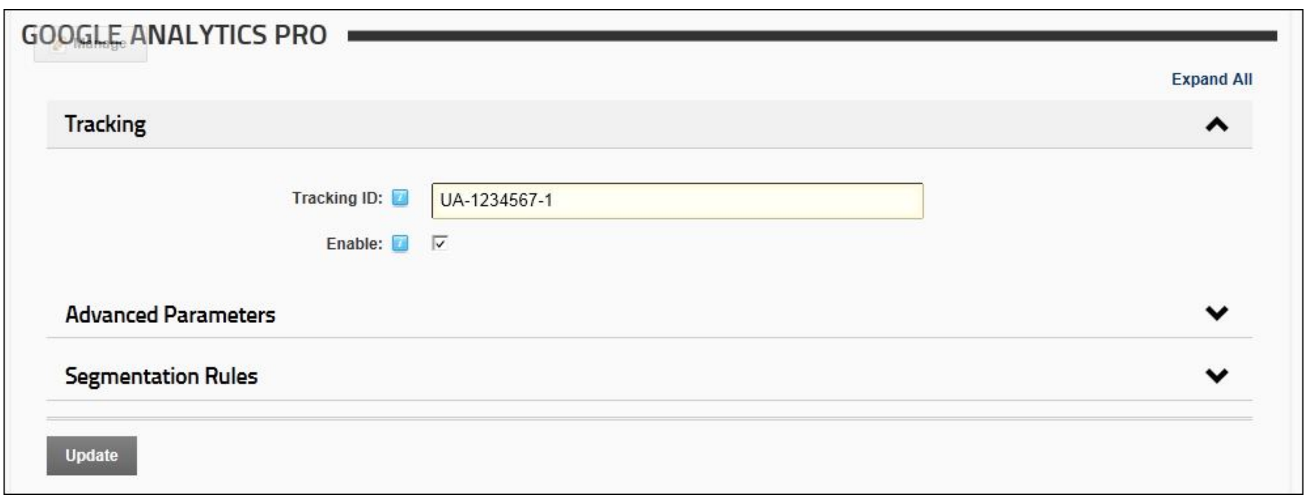
5. Click the **Test URL Rewriting** button. This displays the following results below:
    - **Rewriting Result**: Displays the rewritten URL in the raw format as it will be seen by the DNN platform and third-party extensions.
    - **Identified Language / Culture**: Displays the culture code as identified during the URL Rewriting process.
    - **Identified Page**: Displays the name of the DNN page that has been identified during the URL Rewriting process.
    - **Redirection Result**: If the tested URL is to be redirected, shows the redirect location of the URL.
    - **Operation Messages**: This field will display any debug messages created during the test URL Rewriting process.

Google Analytics Pro

About Google Analytics Pro

Google Analytics Pro enables Administrators and authorized users to analyze and improve online search results. Administrators can create segmentation rules that isolate and analyze subsets of your site traffic. Located on the Admin > Advanced Settings Google Analytics Pro page, this module can be added to any site page.

Module Version: The version number is always the same as the DNN framework version number.



Google Analytics Pro

What Is Google Analytics and why should I consider using it

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

Currently, some of the major feature points include:

- **Analytics Intelligence**: Google Analytics monitors your reports and automatically alerts you of significant changes in data patterns.
- **Advanced Segmentation**: Isolate and analyze subsets of your traffic with a fast interactive segment builder.
- **Flexible Customization**: Get the data you need, organized in the way you want to see it with custom reports, custom variables, and a flexible tracking API.
- **E-Commence Tracking**: Trace transactions to campaigns and keywords, get loyalty and latency metrics, and identify your revenue sources. GOALS Track sales and conversions. Measure your site engagement goals against threshold levels that you define. MOBILE TRACKING Track web-enabled phones, mobile websites and mobile app's.
- **Data Export**: API Integrate business information and develop applications that access Google Analytics data.
- **Advance Analysis Tools**: Perform advanced data analysis with pivot tables, filtering and multiple dimensions. Discover new trends and insights with motion chart visualizations.
- **Benchmarking**: Find out whether your site usage metrics underperform or outperform those in your industry.

How do I get an account?

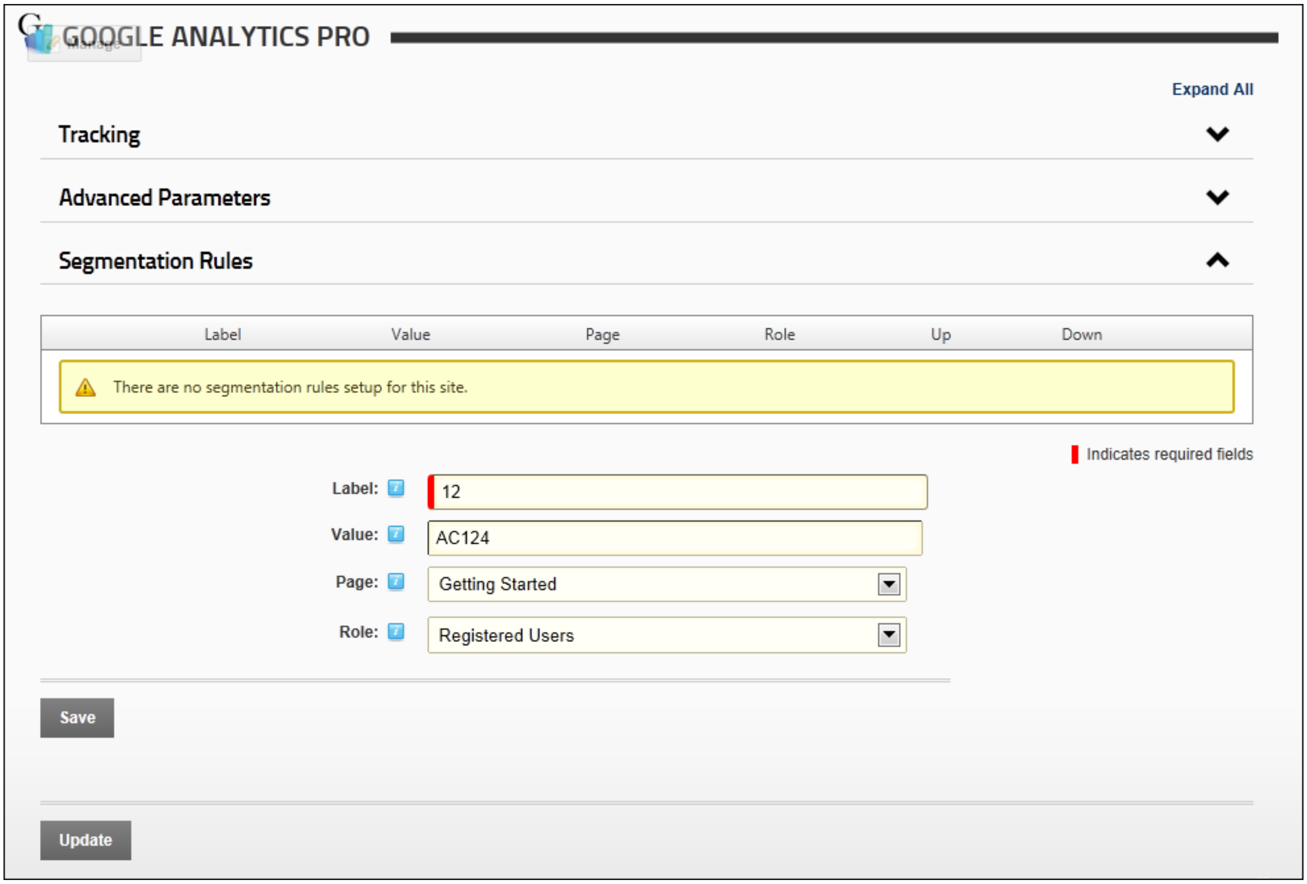
For details on Google Analytics and to sign up for an account, visit the Google Analytics website at http://www.-google.com/analytics and look for the sign up link.

Adding a Segmentation Rule

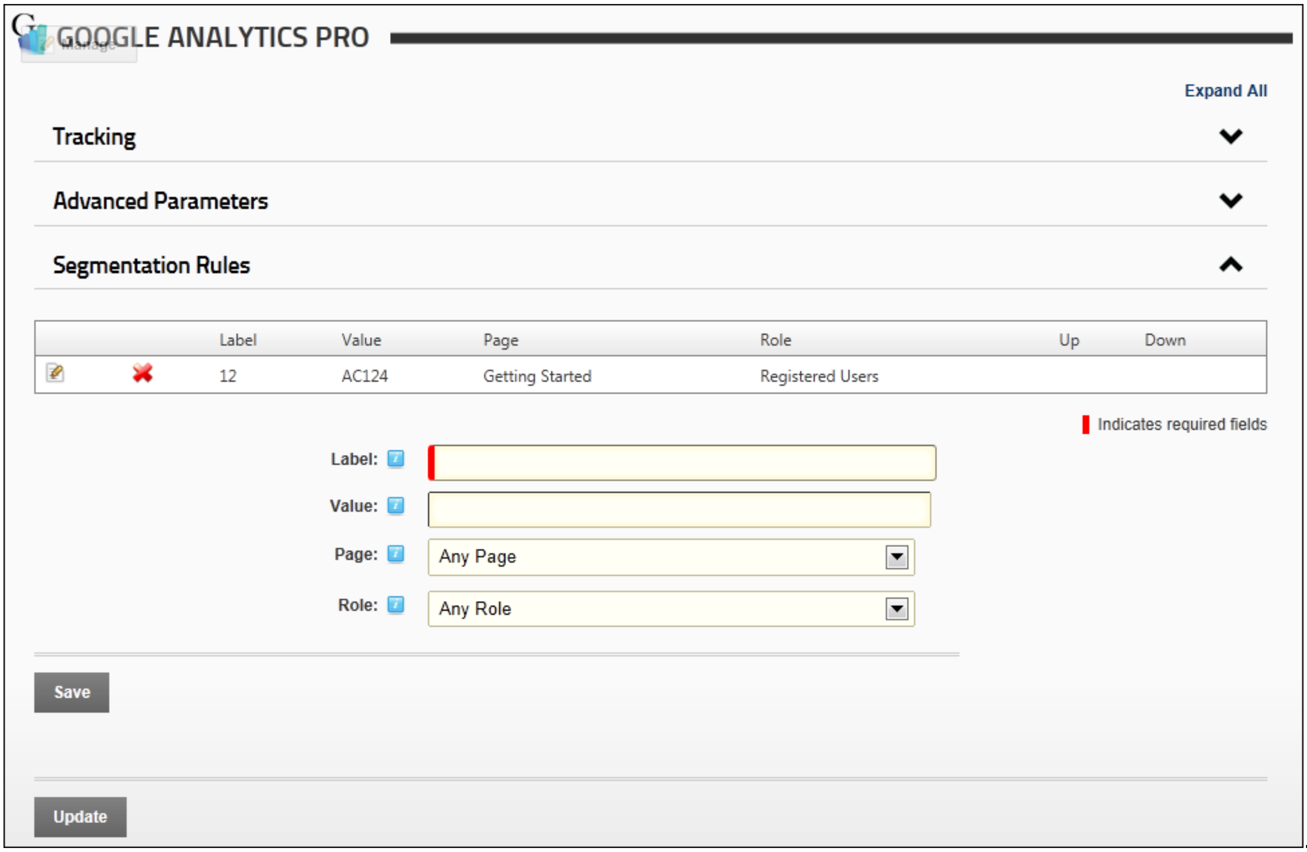
How to add up to 5 segmentation rules using the Google Analytics Pro module. Segmentation Rules allow you to isolate and analyze subsets of your traffic in a granular fashion. The rule editor is designed to facilitate the creation of a list of rules that are enumerated in order until a match is found. The order of rules is important because the match criteria are Page, then membership within a Role. In order to see code emitted on the page, two conditions would have to be met: Restart app after changing rules as they are cached; and at least one rule much match. The order of rules sets the priority in which they are applied. For example, if a user satisfies more than one rule, then the first rule will apply to him/her.

Prerequisite. The Google Analytics module must be configured. See "Configuring Google Analytics Pro"

1. Navigate to Admin > Advanced Settings > **Google Analytics Pro** - OR - Go to a **Google Analytics Pro** module.
2. Expand the **Segmentation Rules** section.
3. In the **Label** text box, enter a name (label) for this segmentation rule.
4. **Optional.** In the **Value** text box, enter the value of the segmentation category.
5. **Optional**. At **Page**, select a page name to limit this rule to a single page - OR - Select **Any Page** to apply the rule to any pages.
6. **Optional.** At **Role**, select a role name to limit this rule to a single role - OR - Select **Any Role** to apply the rule to any page.



7. Click the **Save** button. The newly added rule will now be displayed at the top of the Segmentation Rules section.



8. Repeat steps 3-7 to add additional rules and then use the Up and Down arrows to order the rules in order of priority.

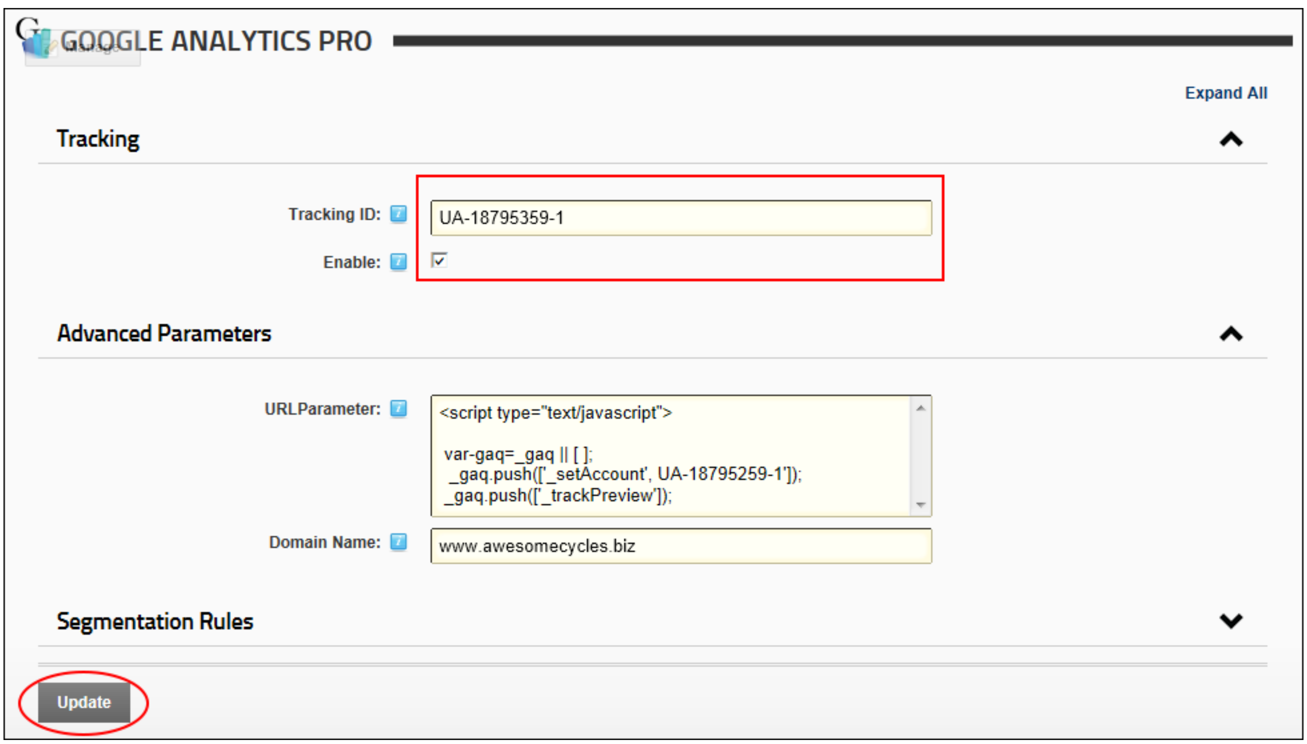
Configuring Google Analytics Pro

How to configure Google Analytics Pro.

Prerequisite. You must have an existing Google Analytics account. Visit the Google Analytics website at http://www.google.com/analytics and click the **Create an Account** button.

1. Login to your Google Analytics account.
2. Go to https://www.google.com/analytics/web/provision?et=&hl=en&authuser=#provision/SignUp/ after logon.
3. Click the **Advanced Segments** button.
4. Go to you DNN site.
5. Navigate to Admin > **Google Analytics Pro** - OR - Go to a **Google Analytics Pro** module.

6. In the **Tracking ID** text box, enter the website tracking ID that you obtained from the welcome message sent by Google when you signed up for an account.
7. At **Enable**, mark the check box to enable Google Analytics Pro - OR - unmark the check box to disable Google Analytic Pro.
8. Expand the **Advanced Parameters** section.
9. **Optional.** In the **URL Parameter** text box, enter the JavaScript code fragment that will be passed as a parameter to the page tracker. This is used to customize the value tracked in Google Analytics instead of the default location. A list of the available parameters is included below this tutorial.
10. **Optional.** In the **Domain Name** text box, enter the domain name of this site to aggregate visits to multiple subdomains in a single profile as if they were a single site. Example: entering ".sample-domain.com" (notice the leading ".") allows you to track dogs.sample-domain.com and cats.sample-domain.com as a single entity.
11. Click the **OK** button to confirm. Google Analytics Pro is now enabled and will start collecting statistics.



Here is the list of variables that can be added to the Advanced Parameters section in the URL Parameter field _setCustomVar(index, name, value, opt_scope)

index (required): The slot for the custom variable, it can range from 1-5 for standard accounts or 1-50 for Premium accounts.

name (required): The name for the custom variable, a string that identifies the custom variable and appears in the top-level Custom Variables report of the Analytics reports. For example, if you are using a slot to track gender, the name would be 'Gender'.

value (required): The value for the custom variable, it appears in the table list of the UI for a selected variable name. Typically, you will have two or more values for a given name. Using the 'Gender' example above, the values would be either 'Male' or 'Female'.

opt_scope (optional): The scope for the custom variable. As described above, the scope defines the level of user engagement with the site. It is a number whose possible values are 1 (visitor-level), 2 (session-level), or 3 (page-level). When left undefined, the custom variable scope defaults to page-level interaction.

Deleting a Segmentation Rule

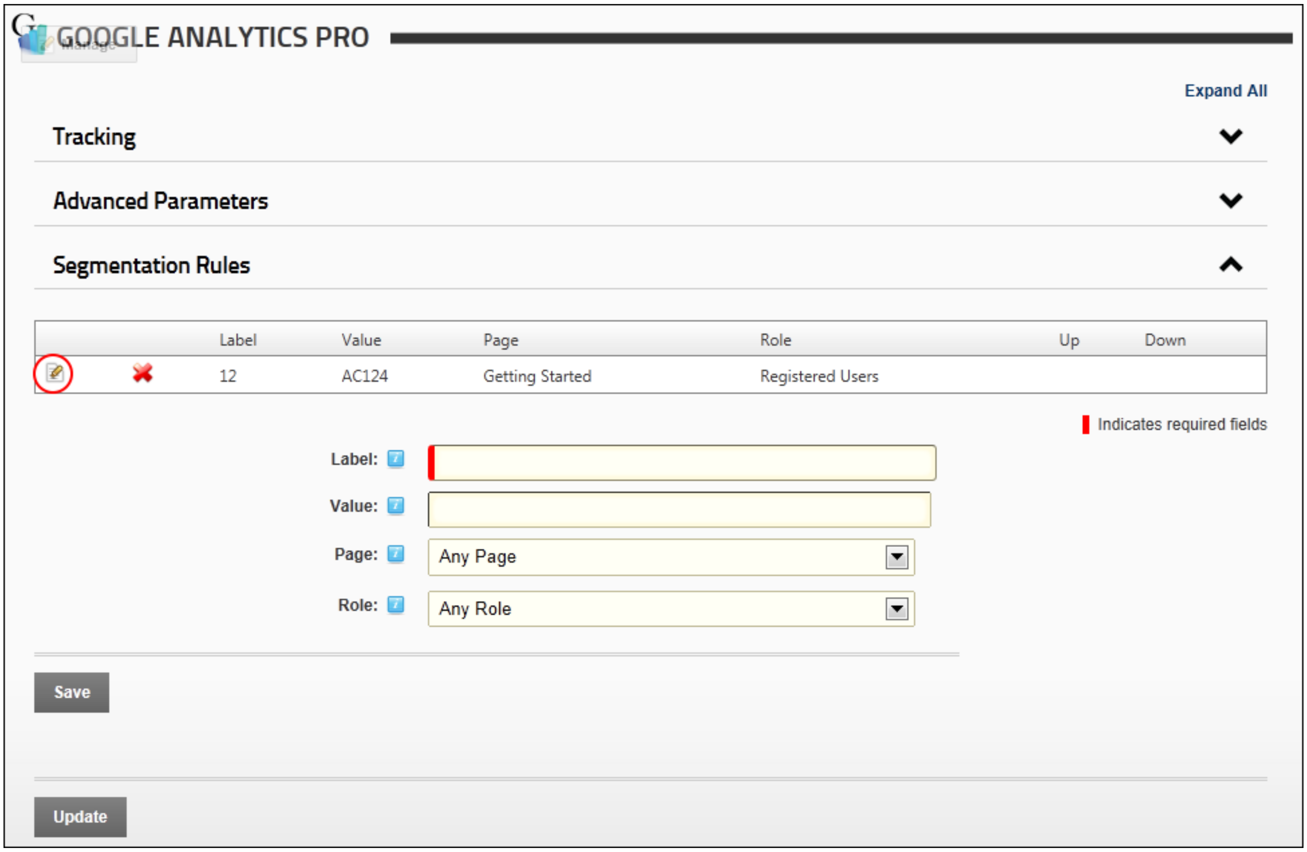
How to delete a segmentation rule from the Google Analytics Pro module.

1. Navigate to Admin > Advanced Settings > **Google Analytics Pro** - OR - Go to a **Google Analytics Pro** module.
2. Expand the **Segmentation Rules** section.
3. Click the **Delete** button beside the rule to be deleted.

Editing a Segmentation Rule

How to edit a segmentation rule to the Google Analytics Pro module.

1. Navigate to Admin > Advanced Settings > **Google Analytics Pro** - OR - Go to a **Google Analytics Pro** module.
2. Expand the **Segmentation Rules** section.
3. Click the **Edit** button beside the rule to be edited. This displays the Edit Segmentation Rule section.



4. Edit one or more fields as required.
5. Click the **Save** button.

Manage Web Servers

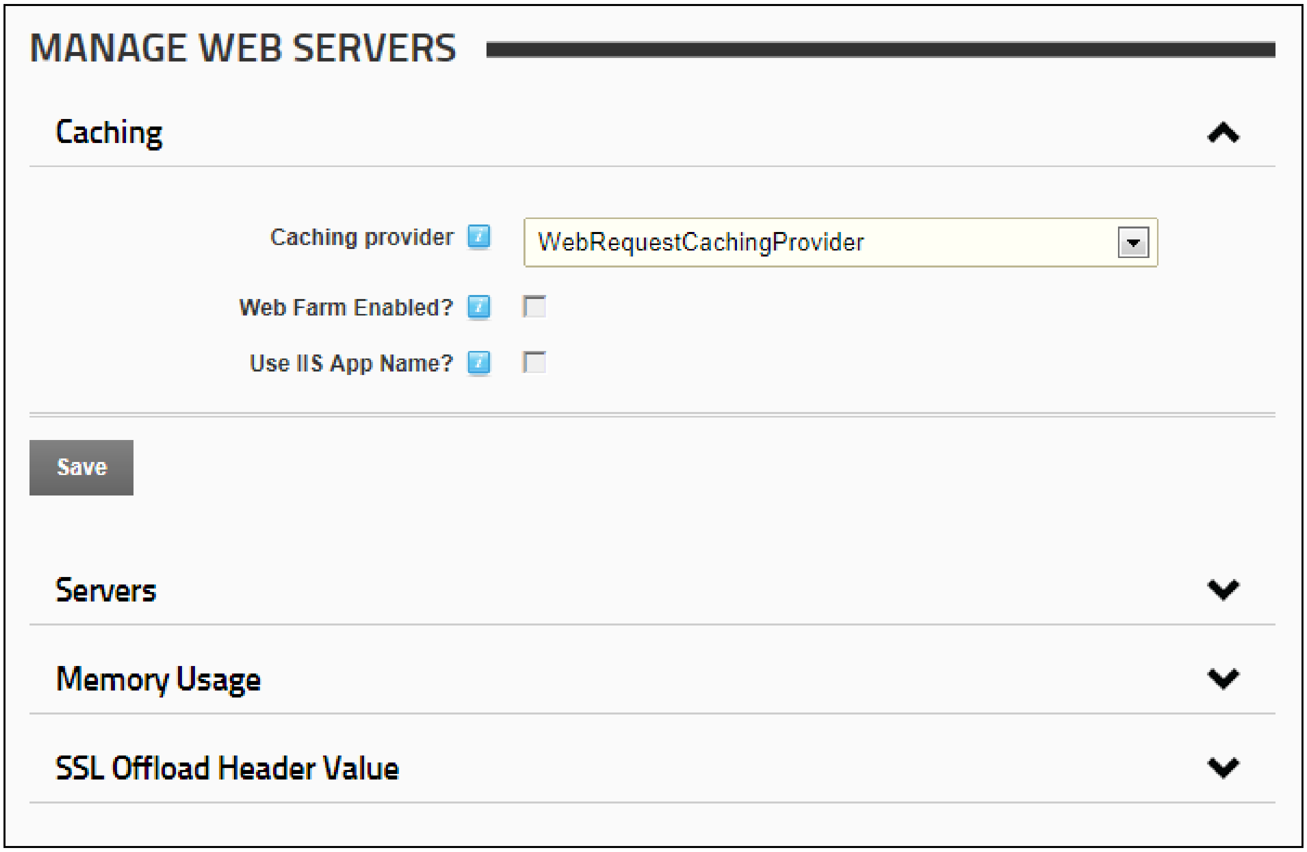
About the Web Server Manager

The Manage Web Servers page (also called Web Server Manager), helps you manage your web servers easily. The Manage Web Servers page is divided into the following four sections:

- **Caching**: Allows you to select the caching provider to be used.
- **Servers**: Allows view all the web servers that your site is currently using, edit the URL and disable/enable a server, view the memory usage for your servers, and manage SSL offloading.
- **Memory Usage**: Allows you to view details regarding the memory being used by your server.
- **SSL Offload Header Value**: Allows you to configure information for SSL offloading.

This module is located on the Host > Advanced Settings > **Manage Web Servers** page and can be added to any site page.

Module Version / **Minimum DNN Version**: The versions numbers for this module match the DNN framework version number.



The Manage Web Servers Module

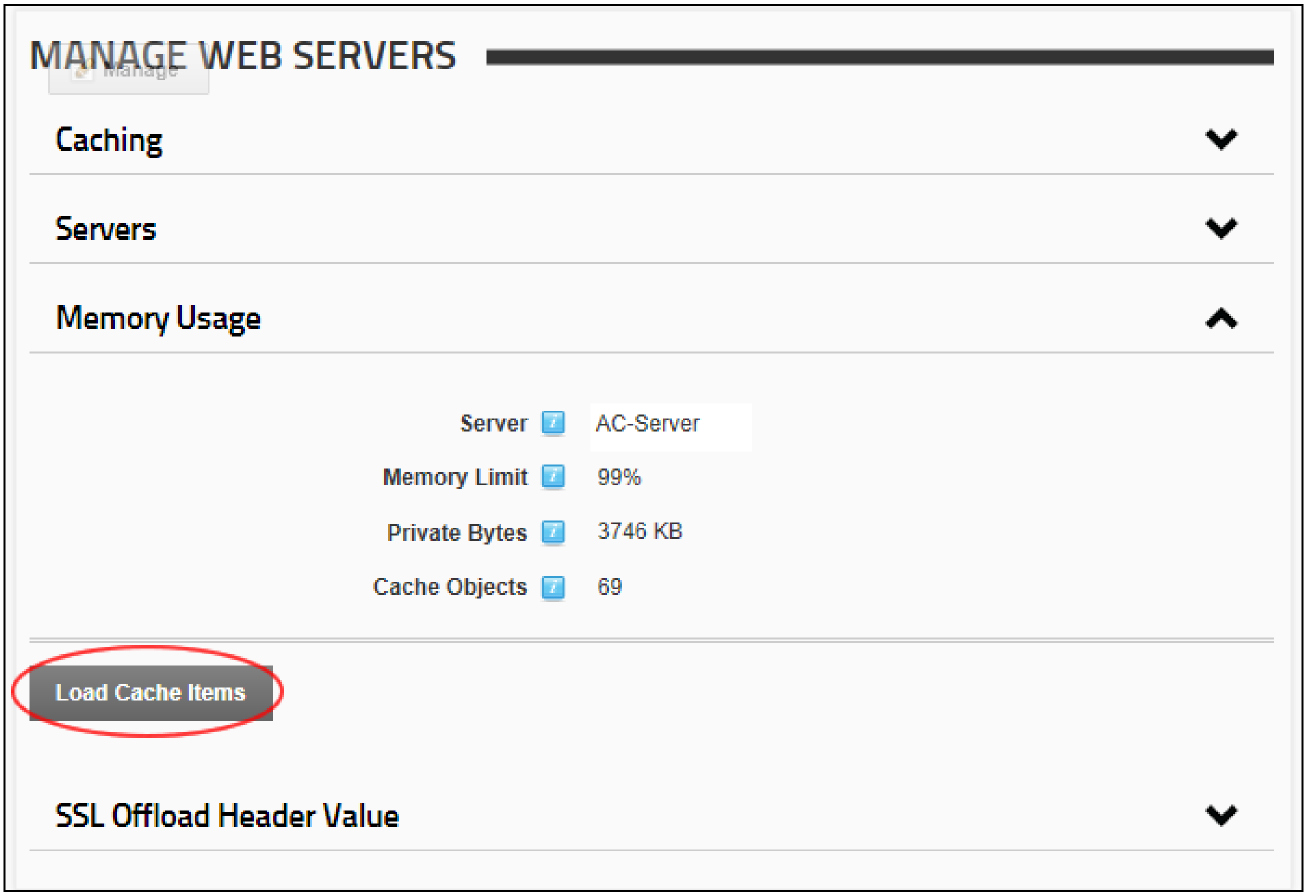
Related Topics:

- About Webfarms and Webfarm configuration guide

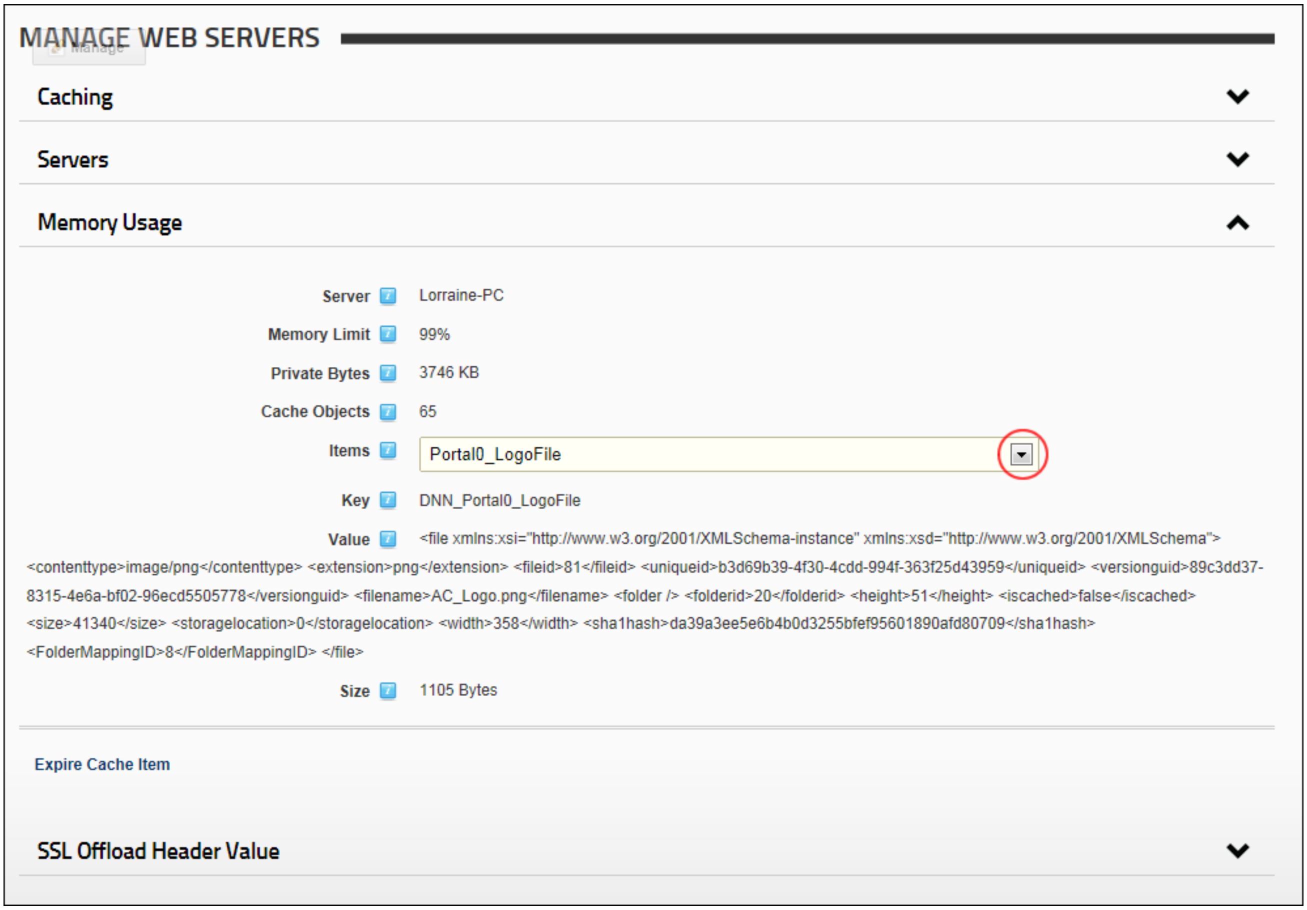
Managing Cache Items

How to view the details of a cached item and choose to expire one or more cached items. If you have a large number of objects in the cache this task may take a while to complete.

1. Navigate to Host > Advanced Settings > **Manage Web Servers**.
2. Expand the **Memory Usage** section.
3. Click the **Load Cache Items** button.



4. At **Items**, select an item from the list of active cache items. This displays the following information for the selected item:
   - **Key**: Displays the full cache key name of the item.
   - **Value**: Displays the value associated to the item.
   - **Size**: Displays the approximate size of the item.

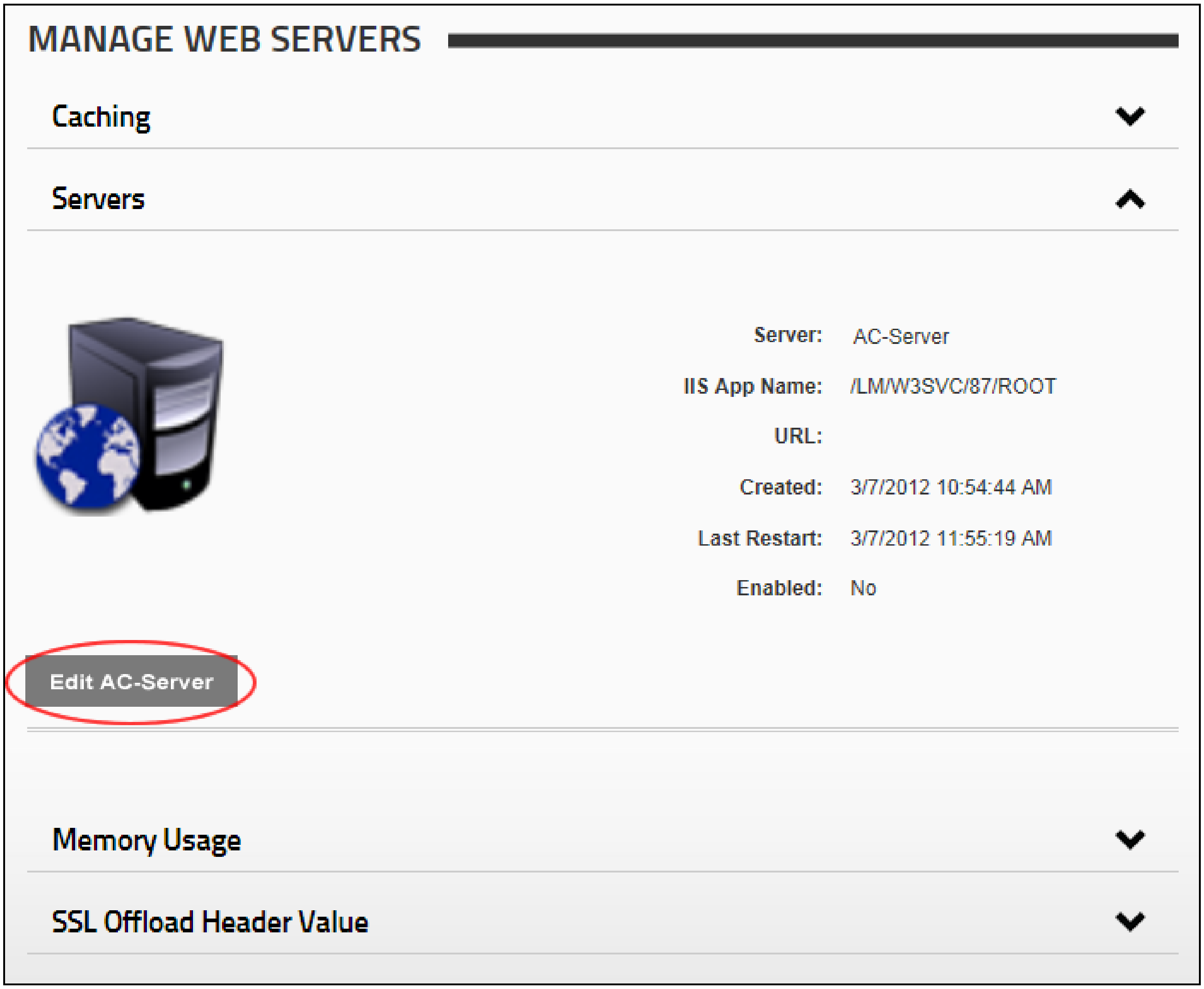


5. **Optional.** Click the Expire Cache Item link to expire this item from the cache and remove it from this list.
6. Repeat Steps 4-5 to view and optionally expire additional items.

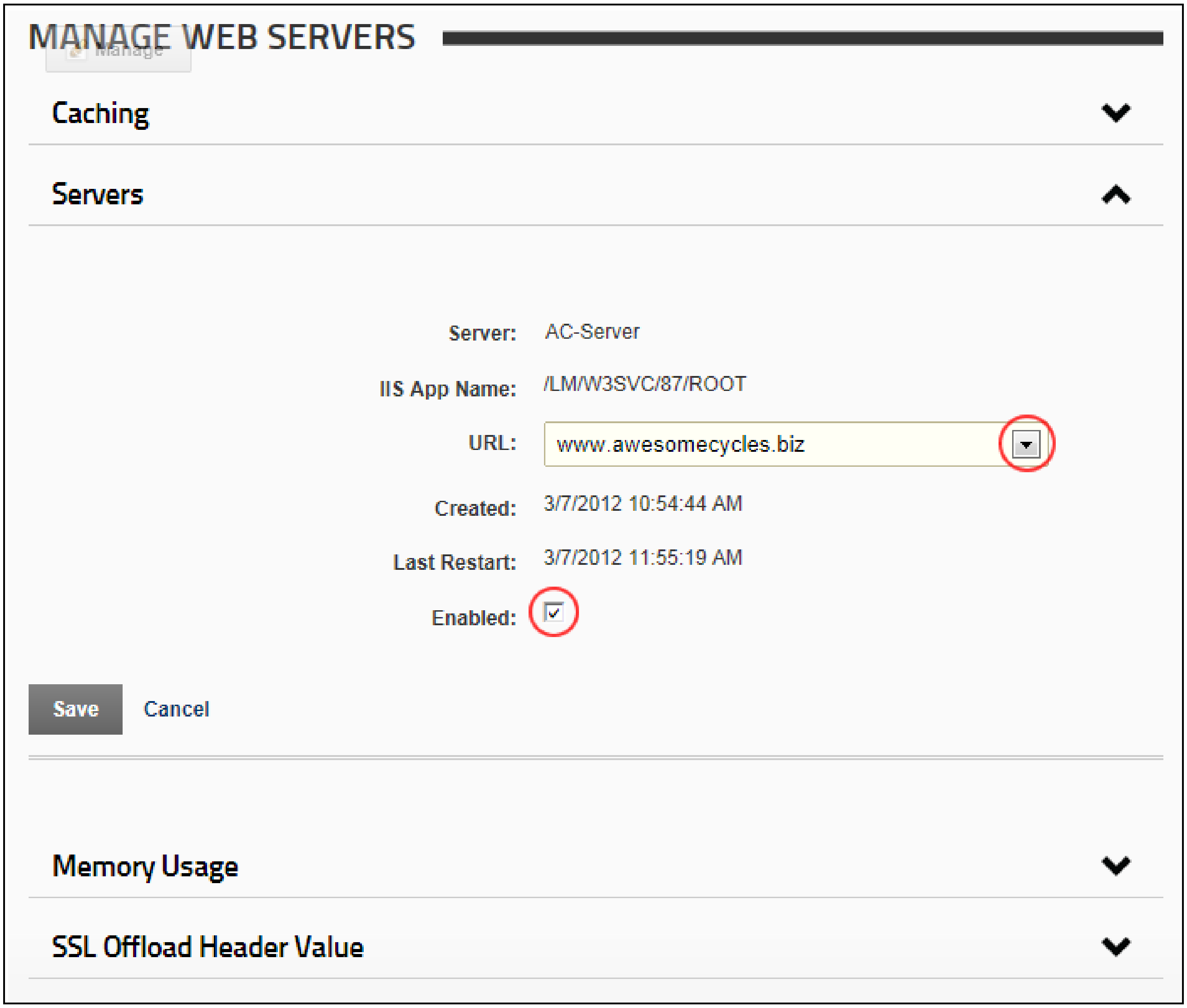
Managing Your Web Server

How to enable or disable one or more web servers for the sites within this DNN installation and set the URL associated with each server.

1. Navigate to Host > Advanced Settings > **Manage Web Servers**.
2. Expand the **Servers** section. This displays a summary of each of the servers associated with this DNN installation.
3. Click the Edit [Server Name] link beside the server you want to manage.



4. At **URL**, select a URL from the drop down list. The URL's listed here are the site aliases for your site. If you are using a web farm then the URL for each of your servers will be unique. The URL will identify each server, you may need to add these URL's to your list of site aliases.
5. At **Enabled**, mark ☑ the check box to enable this server - OR - unmark ☐ the check box to disable this server.



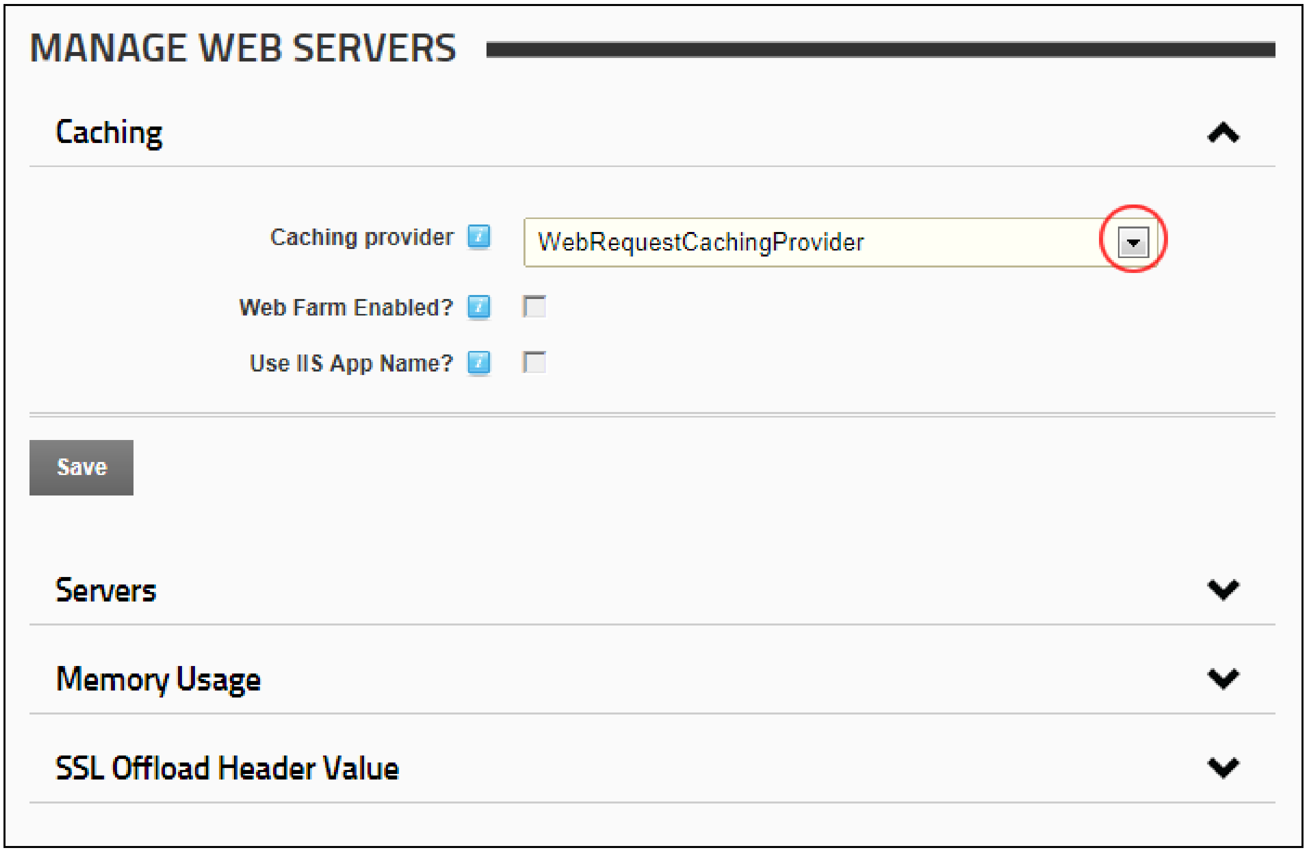
6. Click the **Save** button.

Setting the Default Caching Provider

How to set the default caching provider for your web server.

1. Navigate to Host > Advanced Settings > **Manage Web Servers**.
2. Expand the **Caching** section.

3. At **Caching Provider**, select the default caching provider from these options:
    - **FileBasedCachingProvider**: Select this option for single server implementations.
    - **WebRequestCachingProvider**: This option is recommended for web farms because it uses web requests to keep the cached items synchronized across app-servers. This provider delivers higher levels efficiency since it doesn't rely on Database or the file system.



4. Click the **Save** button.

Setting the SSL Offload Header Value

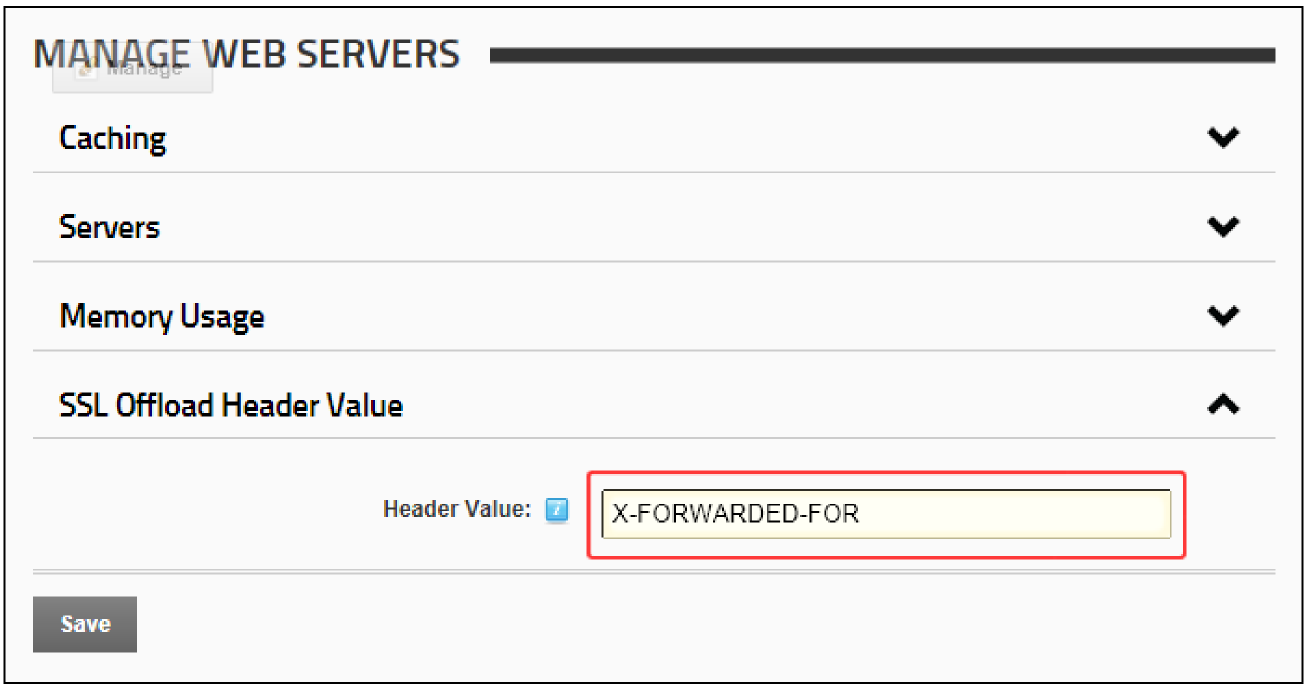
How to set the header value required by load balancers when configuring SSL-offloading for DotNetNuke. Some examples of the headers included:

- Citrix supports custom headers and recommends using SSL_REQUEST. See [http://sup-port.citrix.com/article/CTX118518](http://support.citrix.com/article/CTX118518)

- Weblogic uses a fixed header of WL-Proxy-SSL. See http://fusionsecurity.blogspot.com/2011/04/ssl-off-loading-and-weblogic-server.html
- BigIP/F5 supports custom headers via their iRule rewrite function

Prerequisite. SSL must be enabled for the required sites () and any pages that should be secure should be configured as secure pages.

1. Navigate to Host > Advanced Settings > **Manage Web Servers**.
2. Expand the **SSL Offload Header Value** section.
3. In the **Header Value** text box, enter the header value. E.g. X-FORWARDED-FOR



4. Click the **Save** button.

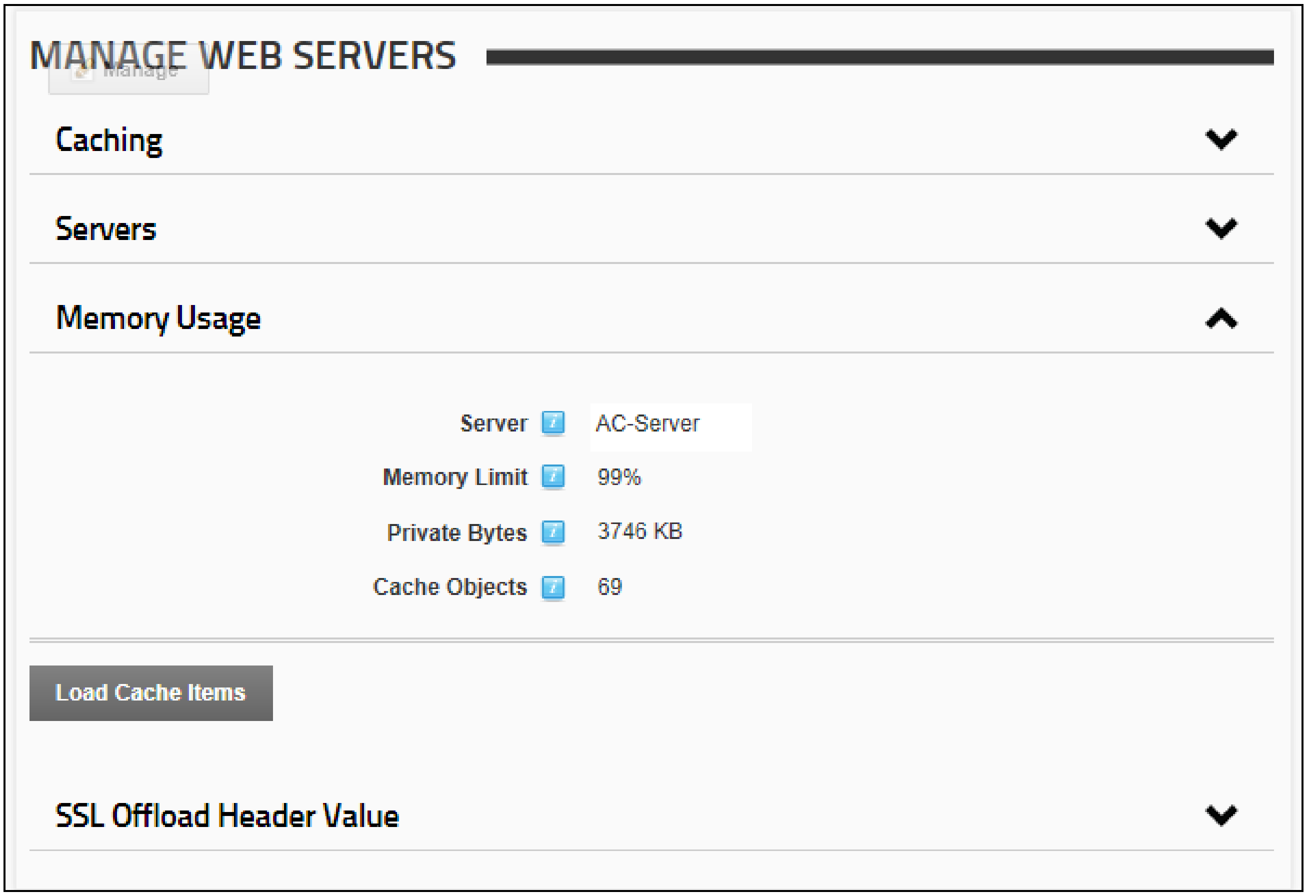
Now when a request arrives at the load balancer, if it has SSL offloading enabled it will pass the request onto the web server with the request rewritten from a secure to insecure request (E.g. `https://mysite.com/default.aspx` to `http://mysite.com/default.aspx`). This will be the request that DotNetNuke processes. Normally DotNetNuke would then determine that the request is for a "secure" page and rewrite the path back to `https://mysite.com/default.aspx`, but the existence of the header ensures that DotNetNuke knows it should instead serve the page up via HTTP. The results will then be passed back to the SSL-

Offloading load balancer which will return the page to the user as those an SSL request was made (as is the case as the SSL certificate was verified by the load balancer which processes SSL requests more efficiently than the individual web server(s) would - as well as simplifying management by ensuring only the load balancer needs the SSL certificate installed rather than each web server).

Viewing Memory Usage Information

The memory usage section of the page provides some information about how your server is using memory.

1. Navigate to Host > Advanced Settings > **Manage Web Servers**.
2. Go to the **Memory Usage** section. The following information is listed:
    - **Server**: Displays the server name.
    - **Memory Limit**: Displays the maximum amount of memory that can be used by the application.
    - **Private Bytes**: Displays how much physical memory (in KB) is available to your application for caching.
    - **Cache Objects**: Displays the number of cache objects that are in memory currently.



Viewing Memory Usage Information

Search Admin

Advanced Crawlers

Directories

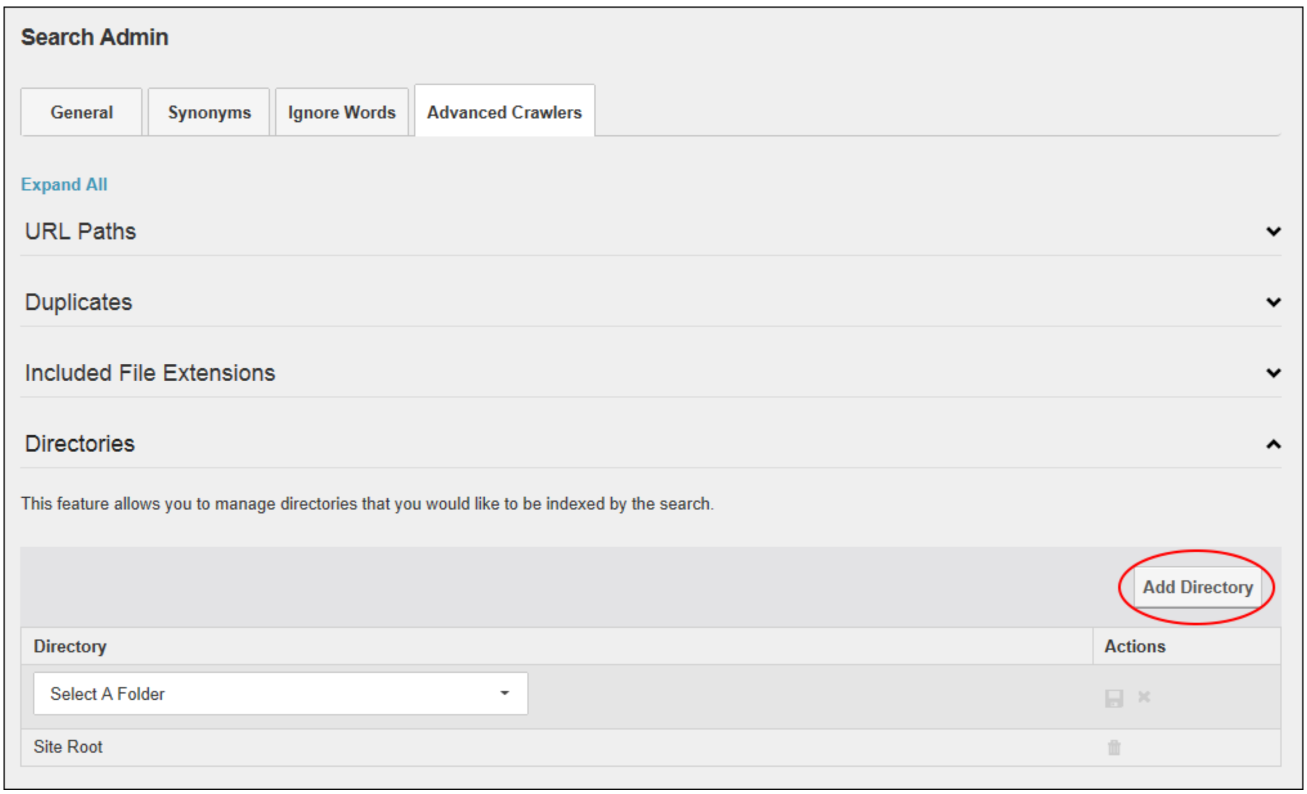
Adding Directories to the Index

How to add one or more directories for indexing using the Search Admin module. The Spider will directly access your file system and index the contents of the directory you specify. The index created through direct directory access, will be seamlessly integrated into the search results.

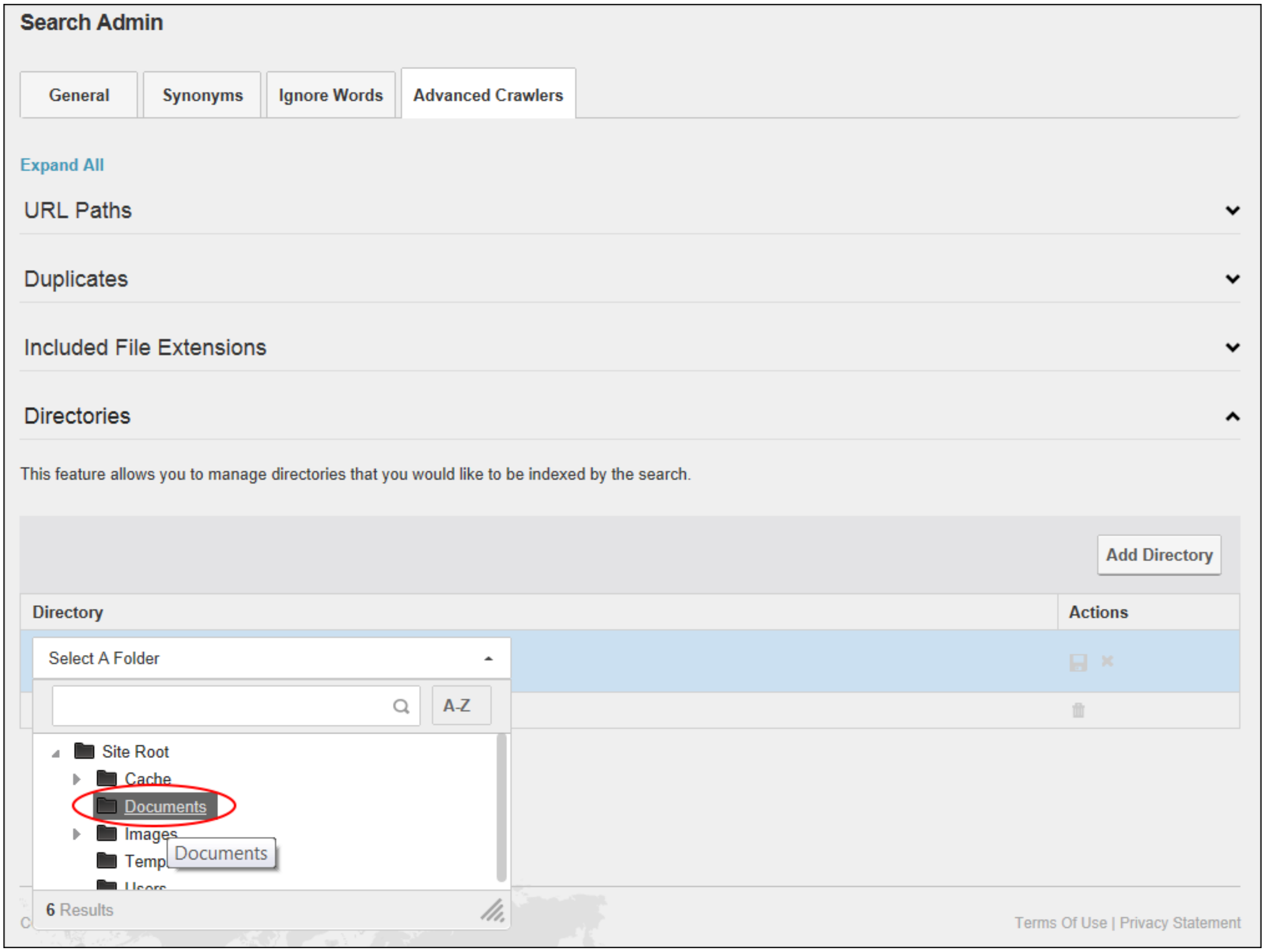
Note 1: The list of directories that can be indexed is limited to the directories found beneath the dnnroot/portals folder. This folder is where the default site and all child sites are created and all the files within the selected directory will be indexed, regardless of any access level you might have assigned through the Digital Asset Management module.

Note 2: If you index a directory in this way, and you also perform an index of the website that has links to some of the documents in the directory, you may get duplicate results.

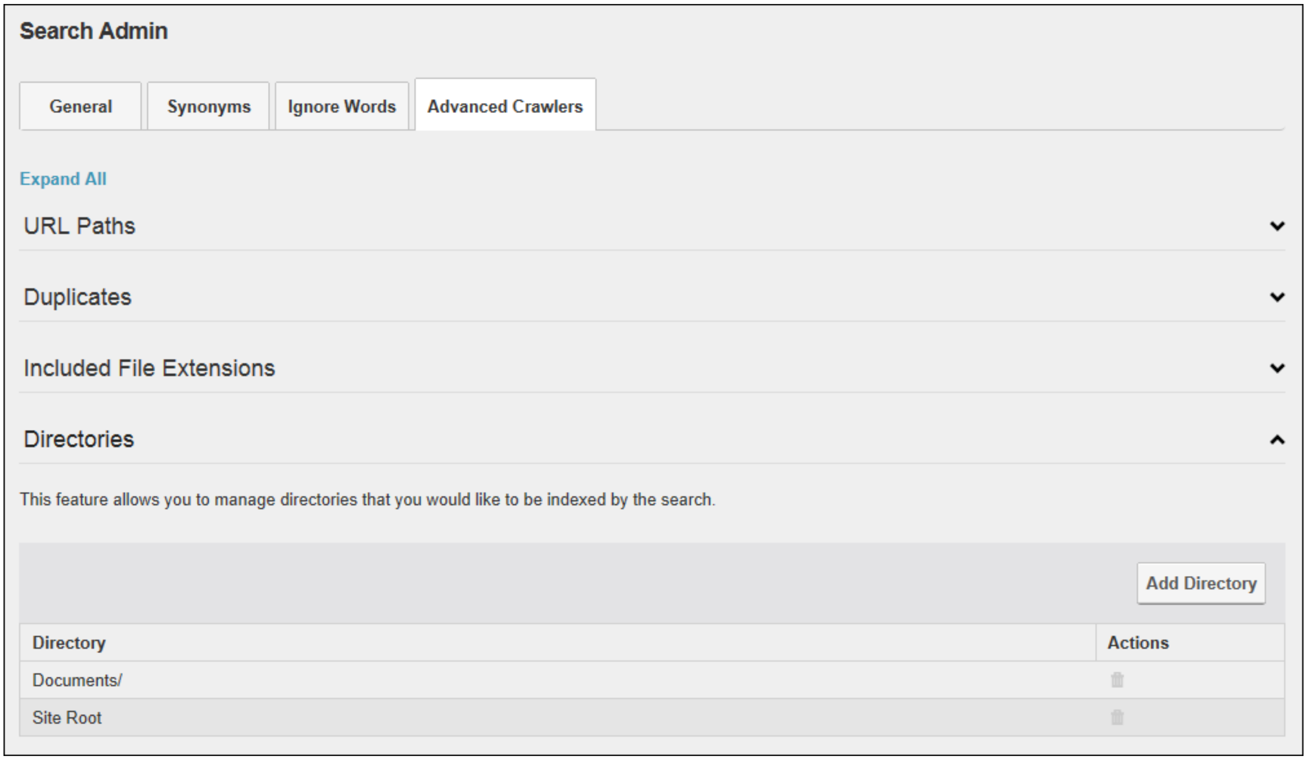
1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **Directories** section.
4. Click the **Add Directory** button.



5. At the **Select A Folder** drop down list, select the directory that you would like the Search Crawler (DNN Search Engine) to index directly, without performing a website crawl.



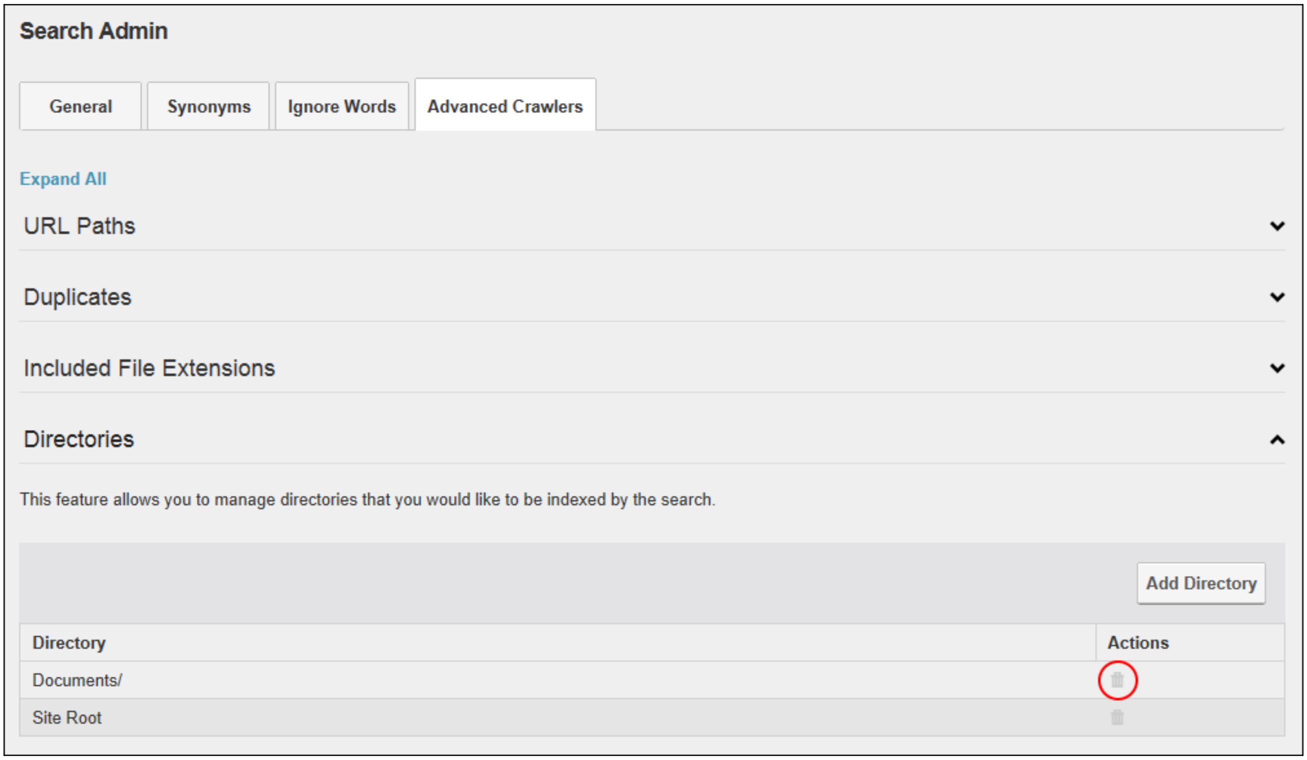
6. Click the **Save** button to save your changes.



Deleting Directories from the Index

How to delete directory paths that have been added to the Search Admin module.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **Directories** section.
4. Click the **Delete** button beside the required item.



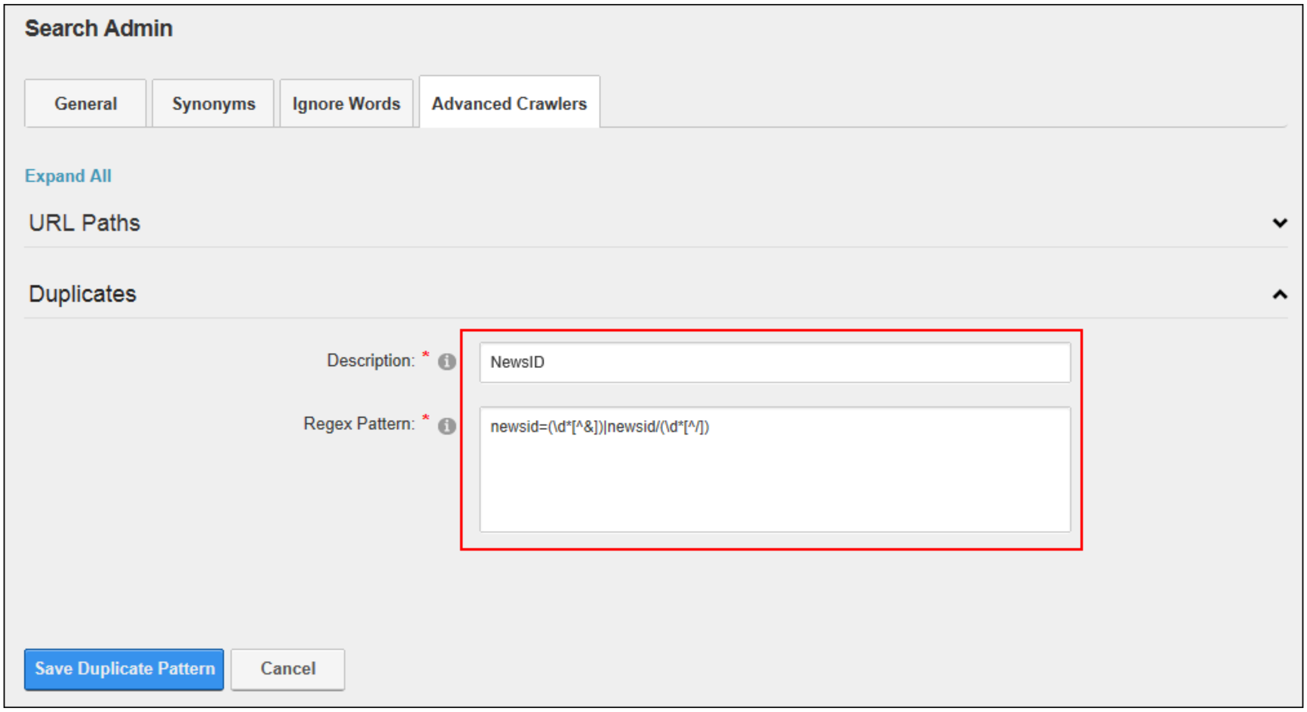
Duplicates

Adding a Duplicate Pattern

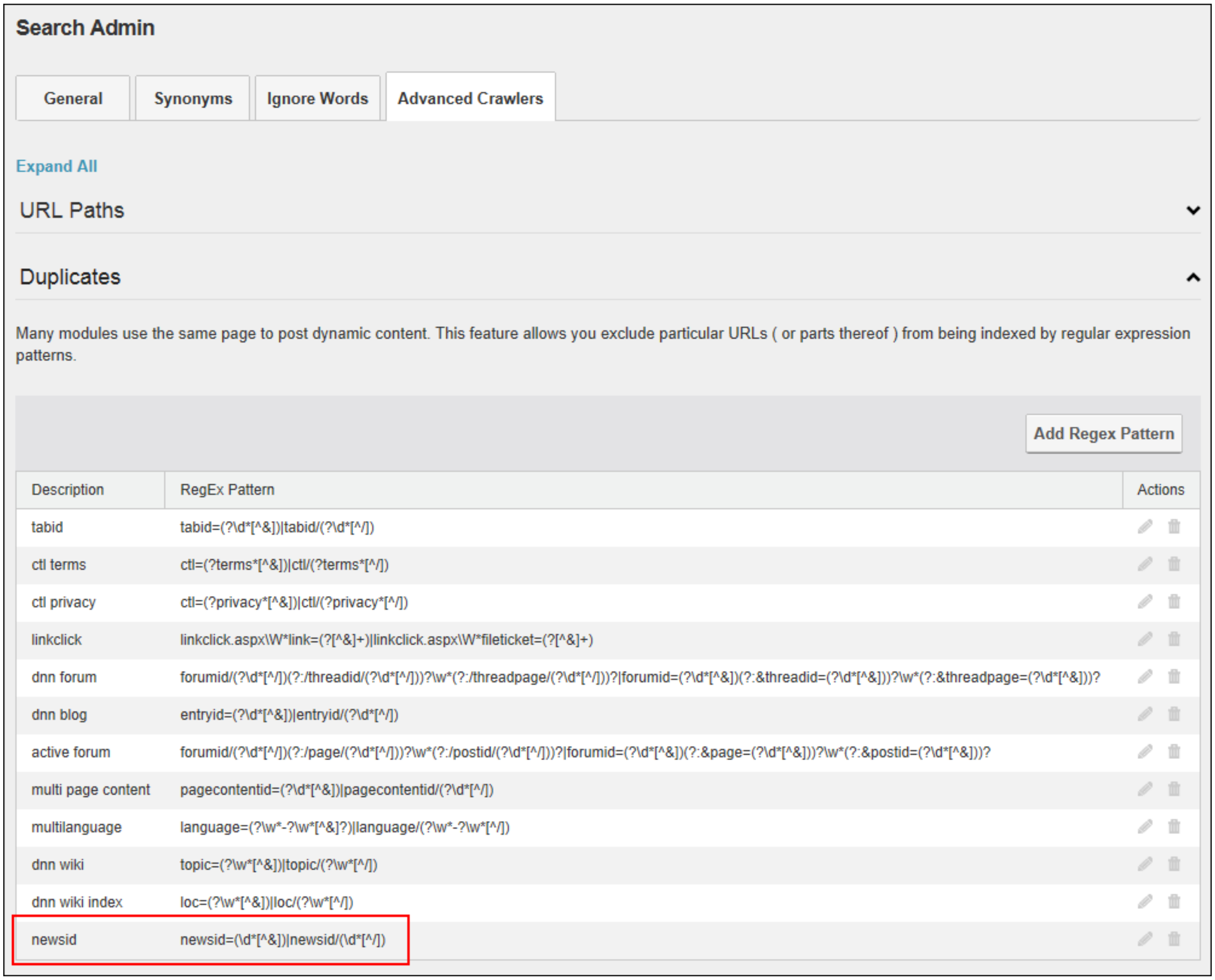
How to add a duplicate pattern to the SearchCrawlerAdmin module. The Duplicates tab allows the manipulation and creation of what is called Duplicate Patterns. This functionality is specific to the indexing of DNN sites, and is meant as a means to reduce duplicates in the search results. Duplicate Patterns are regular expressions that recognize URL parameters. Thanks to duplicate patterns, by default, in a DNN site, the spider indexes the same "tabid" only once. If you have a control that through the use of URL parameters posts to the same page, and creates dynamic content through URL parameters, then you will have to create a regular expression that recognizes such parameters and add it to the list. The Spider will recognize the parameters and not consider the same "tabid" as a duplicate.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **Duplicates** section.
4. Click the **Add Regex Pattern** button.
5. In the **Description** text box, enter a friendly name for this regular expression. E.g. NewsID

6. In the **Regex Pattern** text box, enter the regular expression that will recognize the parameters specific to a module. This will change the content of the html dynamically. E.g. newsid=(\d*[^&])|newsid/(\d*[^/])



7. Click the **Save Duplicate Pattern** button. The new duplicate will be added to the end of the list.



> Tip: Duplicate Patterns are stored in an XML file in the **/DesktopModules/XSSearchSpider/XSSearchSpiderDuplicatePatterns.xml** file. For the correct functioning of the duplicates reduction mechanism, some entries are required: Tabid, ctl terms, and ctl privacy. You can always choose not to filter for duplicates and delete all entries, or simply delete the physical .xml file.

Example: You have just installed a fantastic custom links module that shows a brief description and a more... link, to see the details. Clicking on the more... link, will cause a refresh of the page, and the links module will disappear to be replaced by some very interesting details. Yes, you are still on the same page, your view has simply changed because clicking on more... caused the URL of your Web browser to get an additional parameter: newsid=xx. So, here is what the spider views by default:

Before clicking on more...:

URL: http://www.yoursite.com/default.aspx?tabid=1

After clicking on more...:

URL: http://www.yoursite.com/default.aspx?tabid=1&newsid=1

Since in both cases tabid=1, then the spider would not follow the more... link, because it would consider it a duplicate. We then need to teach the spider that tabid=x + newsid=x is a unique identifier for a page. Since tabID is already taken care of by another regular expression (one of the required ones), we only need to worry about recognizing newsid. The easiest thing to do is to copy a regular expression that already exists on the list, and start modifying it. We'll take the one that recognizes tabid as a template since it recognizes a single parameter that is a number.

tabid=(?\d*[^&])|tabid/(?\d*[^/])

you will see there is a "|" in the middle of the regex. This is the equivalent of an "or" because all of our regular expressions need to recognize 2 formats: regular URL's and friendly URL's. The left side recognizes normal URL's and the right side of the "|" recognizes friendly URL's.

Let's take the left side of the "or" and analyze that:

tabid=(?\d*[^&])

this tells me that I am looking for something that starts with tabid=, and I want to capture the value to the right of the "=" sign, which is a decimal (\d*), up to the first occurrence of an ;&; and place this value in a variable called ... in English: gimme the value of the parameter tabid.

We want to do exactly the same for our newsid parameter. So let's start changing some names: tabid will become newsid (and that's really all you need to do).

newsid=(\d*[^&])|newsid/(\d*[^/])

Notice the following:

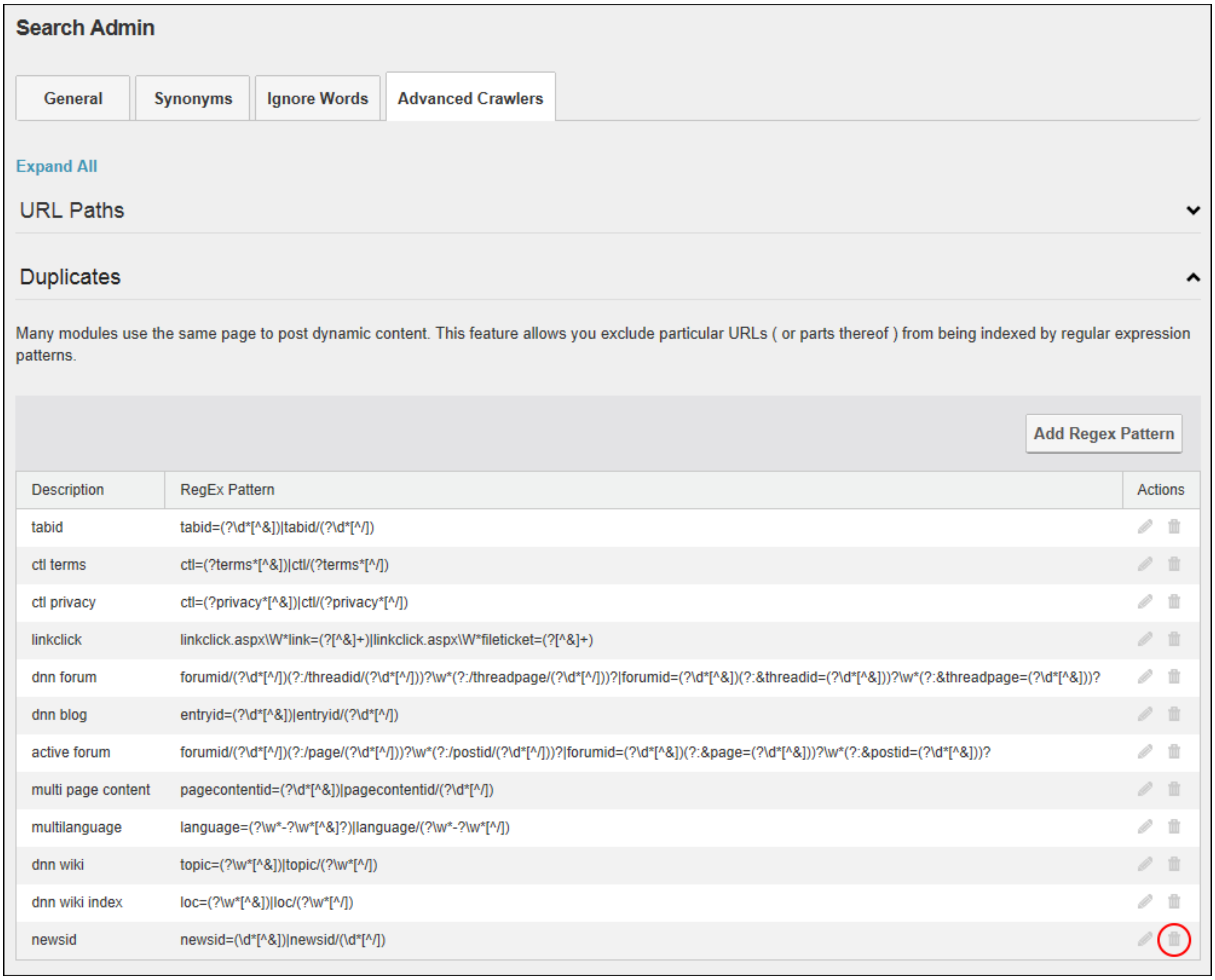
- If the value of newsid had been an alphanumeric instead of a number, then you could have used \w* instead of \d*.
- The name of the variable where you will place the value is irrelevant, as long as it is unique within the same regular expression.

Adding the above regular expression to the list of Duplicate Patterns, will ensure that the spider will index not only the list of links, but also the details of every link.

Deleting a Duplicate Pattern

How to delete a duplicate pattern using regular expressions using the Search Admin module.

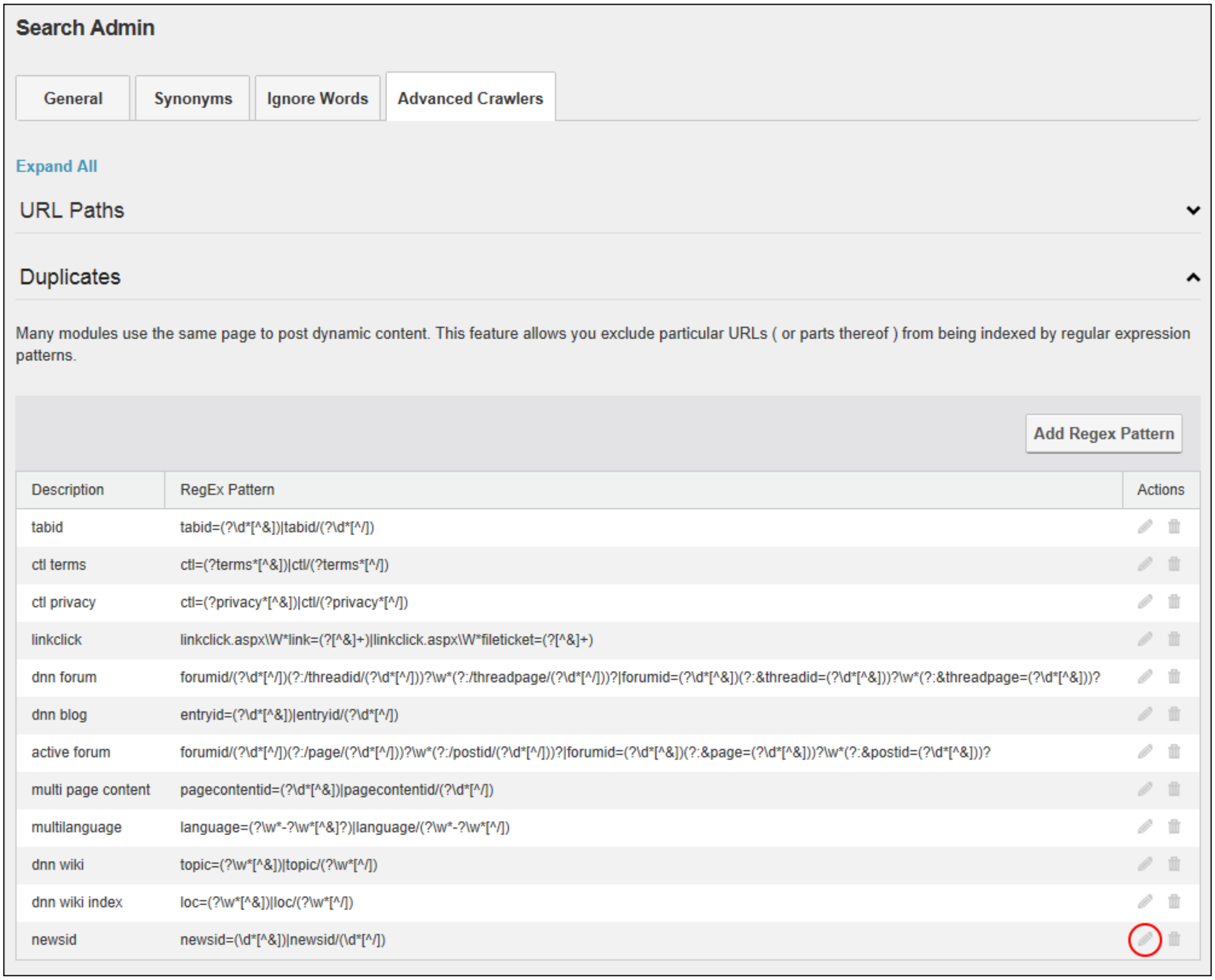
1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **Duplicates** section.
4. Click the **Delete** button beside the required item.



Editing a Duplicate Pattern

How to edit a duplicate pattern using regular expressions, as maintained using the Search Admin module.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **Duplicates** section.
4. Click the **Edit** button beside the item to be edited.



5. Edit the details as required.
6. Click the **Update Duplicate Pattern** button.

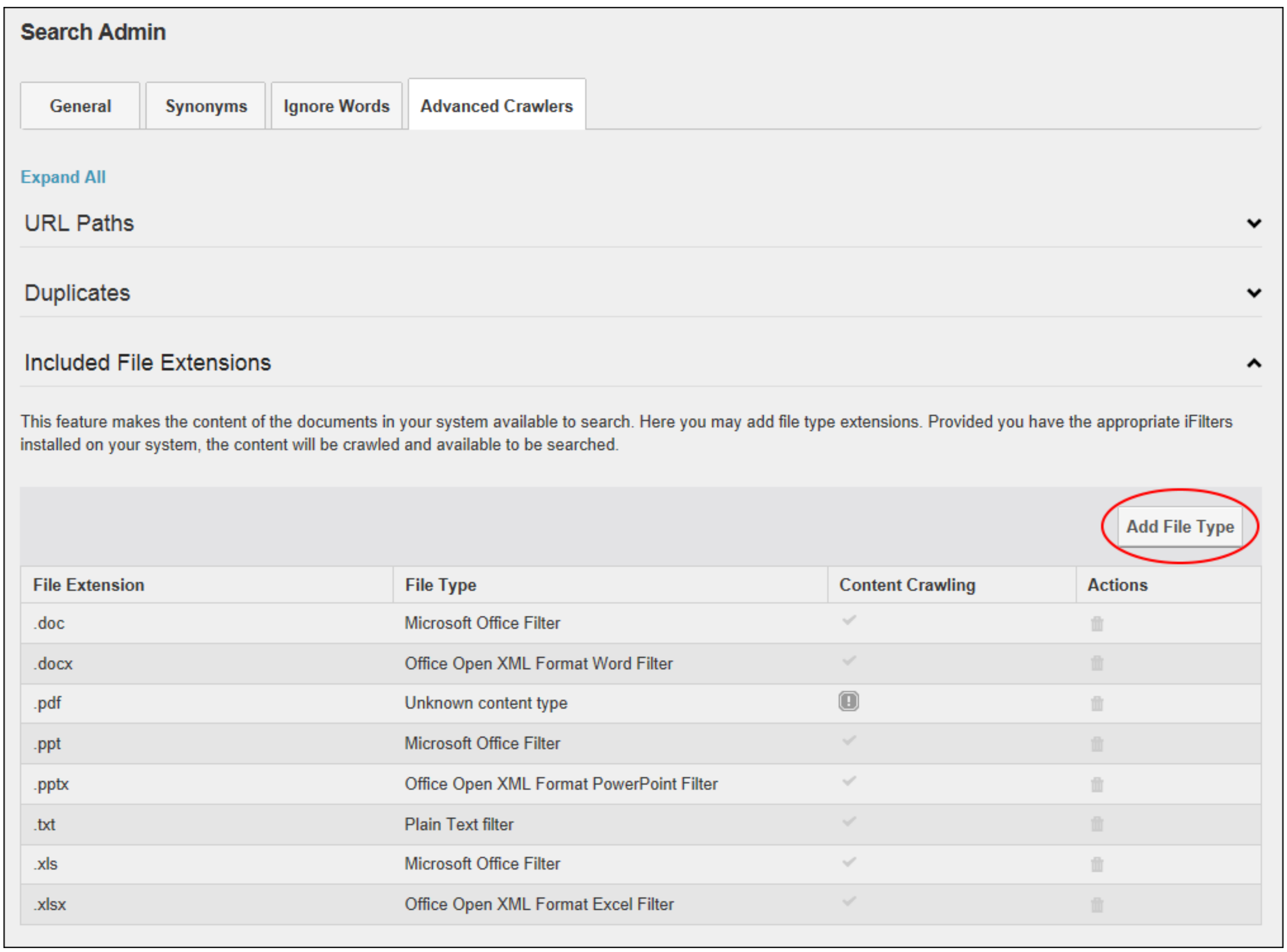
Included File Extensions

Adding File Extensions to Searches

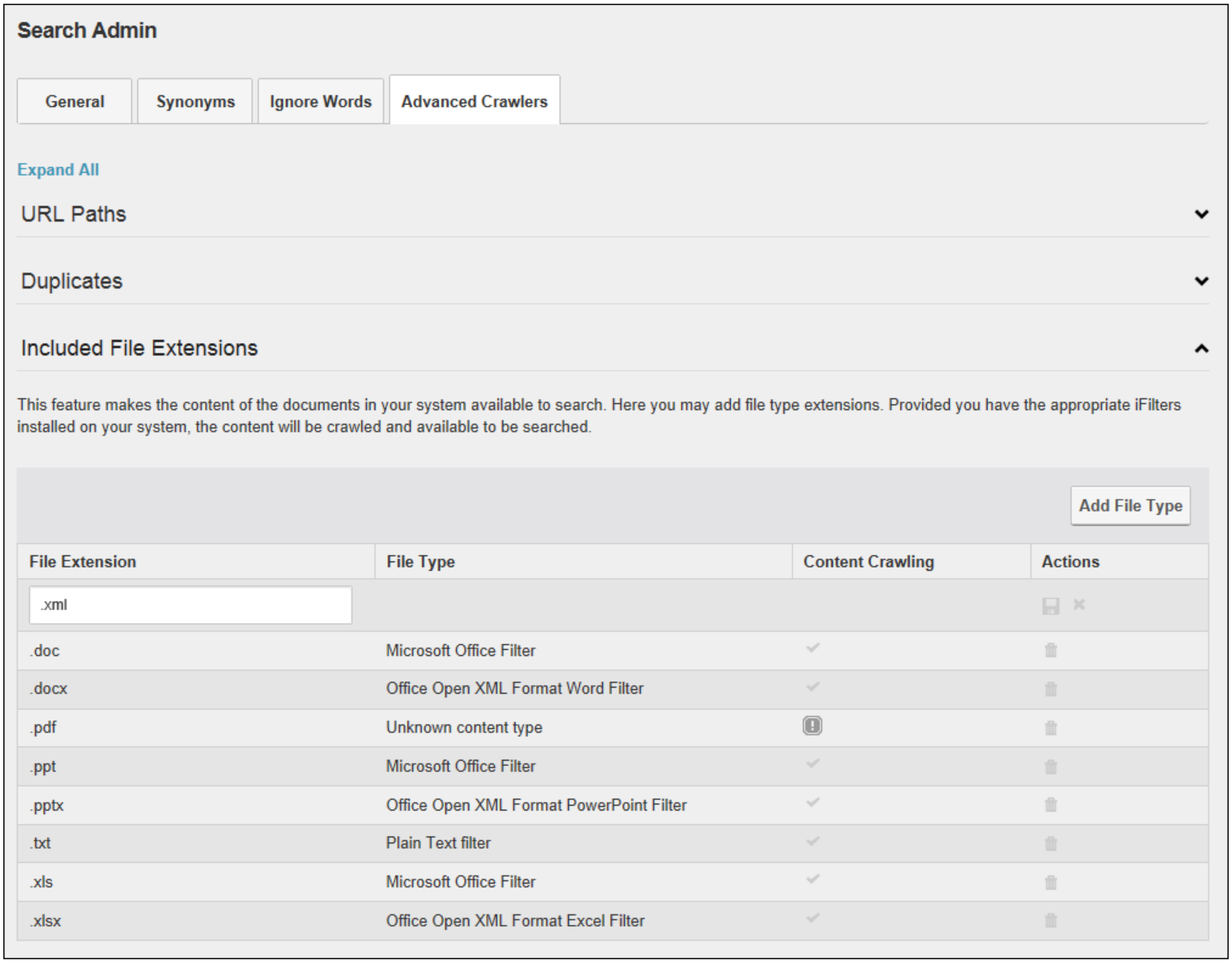
How to select the types of files that are indexed by the Search Crawler spider. Here you can select which Microsoft Word documents are included, choose to include files within the Document Library module and maintain a list of the file extensions to be ignored by the spider. The spider also maintains an internal list of file types that are automatically excluded such as images, style sheets etc. Note: To enable Content Crawling for PDF's you will need iFilters. iFilter is the technology used by Microsoft to index content of Files on Windows desktop. iFilter for MS Office documents are installed by default on all the Windows machines. However, Adobe iFilter is required for Pdf Indexing. You can download it freely from Adobe's website. There are separate installations for 32 bit and 64 bit OS. Version 9.0 is recommended. Once you have downloaded the PDF iFilter you must install it using Remote Desktop and by double-click installer on the desktop.

Prerequisite. File types must be allowable for upload before they can be added for searching. This can be done by contacting your Host.

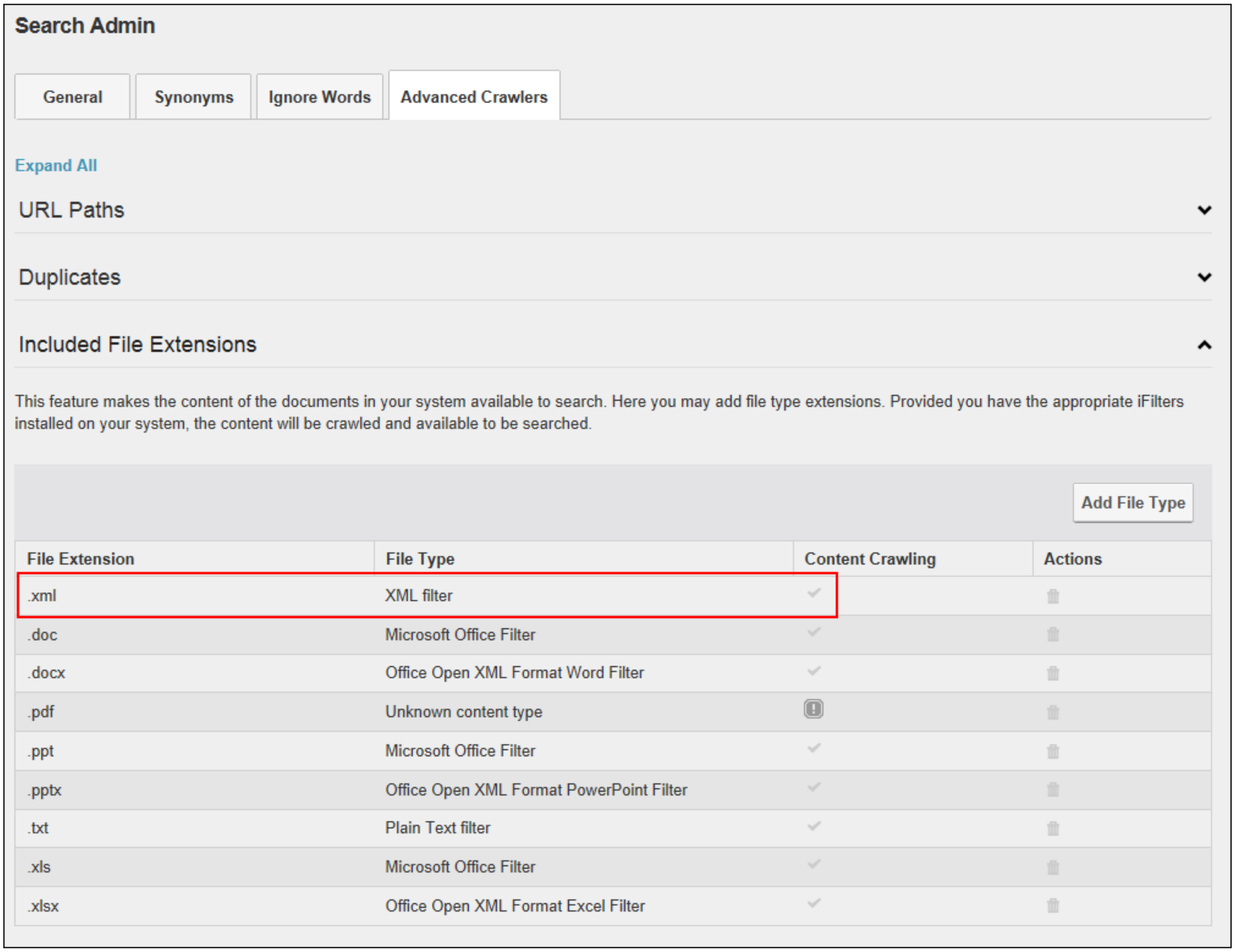
1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Select the **Included File Extensions** tab.
4. Click the **Add File Type** button.



5. In the **File Extension** text box, enter the extension to be included in searches.



6. Click the **Save** button. The File Type details will be added automatically and the Content Crawling column will provide details of whether content crawling is enabled for this extension.

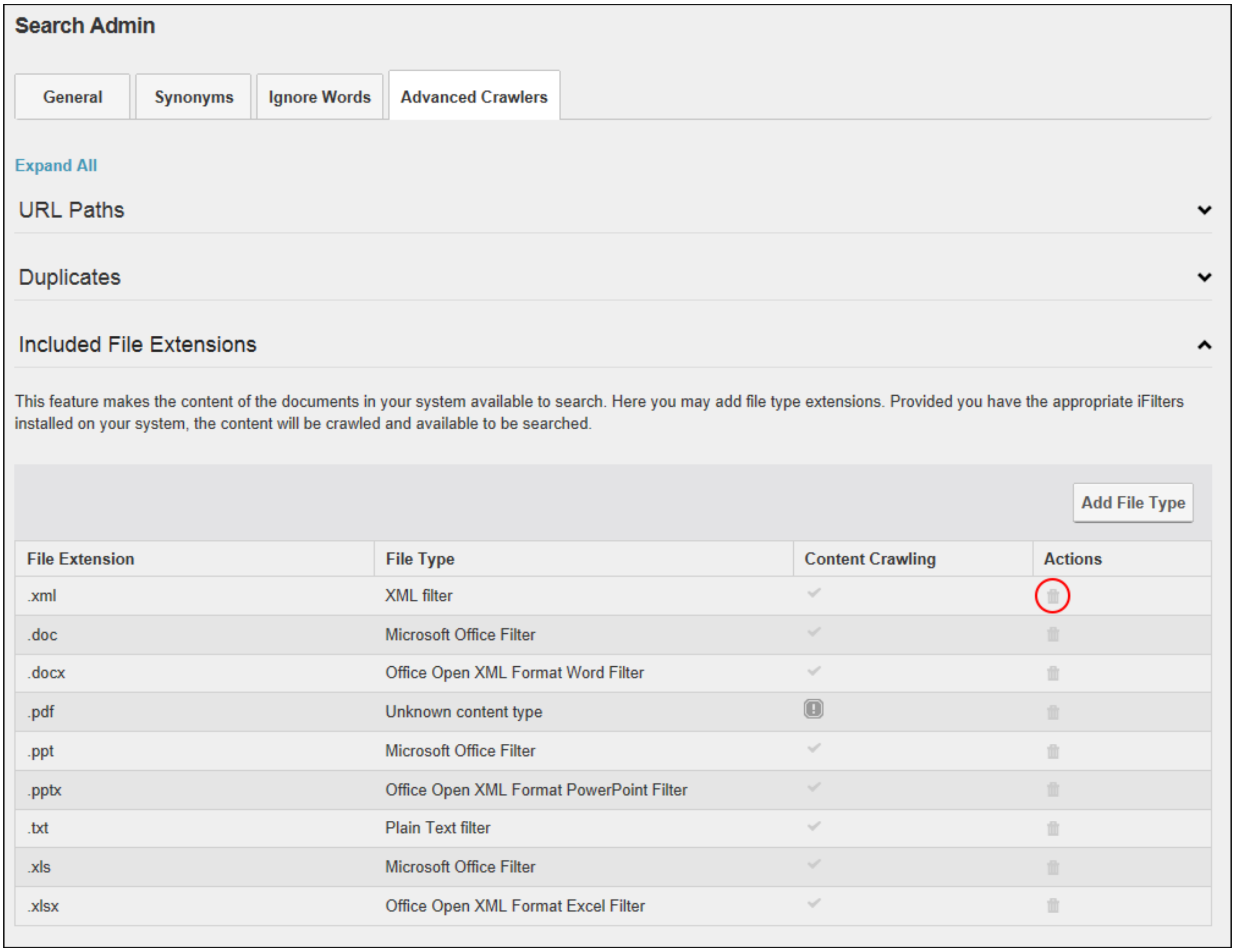


Deleting File Extensions from Searches

How to remove file types from the list of files types that will be indexed by the Search Crawler spider.

Prerequisite. The file extension must be allowed to be uploaded to the site by your Host.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Select the **Included File Extensions** tab.
4. Click the **Delete** button beside the required item.



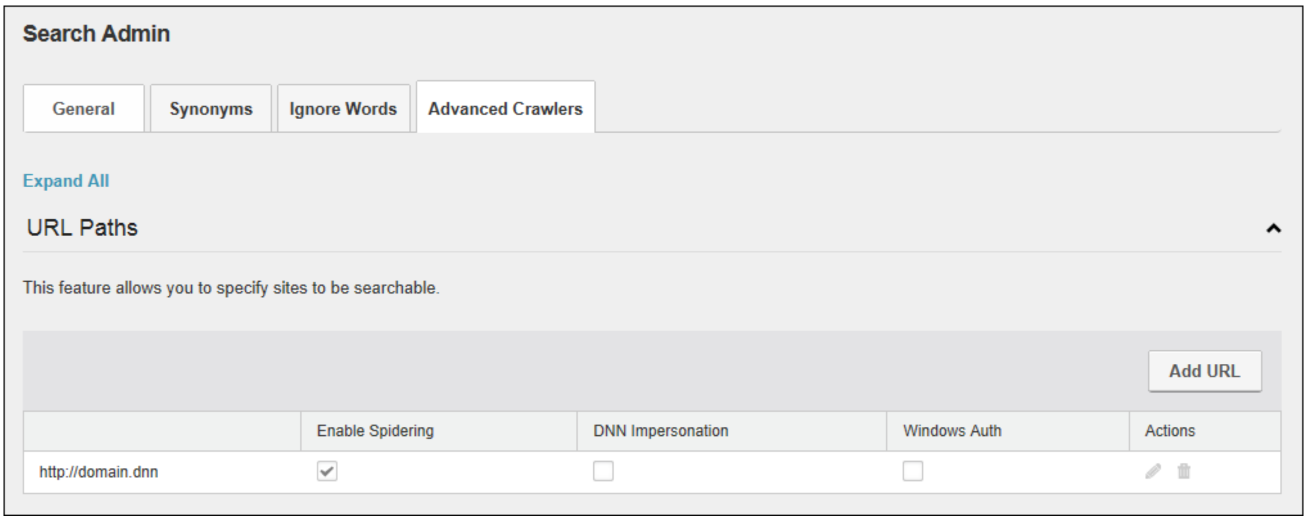
URL Paths

Adding URL's for Indexing

How to add a URL to be indexed using the Search Admin module. Once a site is added for indexing the spider makes requests to pages and follows the links it encounters on those pages. URL's can optionally be set to impersonate a particular role which will restrict the indexing to pages that are viewable by that role. For example, if you select the Administrators role, pages where only an admin has access to will be indexed as well as other site pages. In order for DNN Role Impersonation field to be enabled, the site must exist in the same DNN instance (database) where the spider is installed. This means that a site and all of its child sites are eligible for DNN Role Impersonation, as long as the spider is installed on that site.

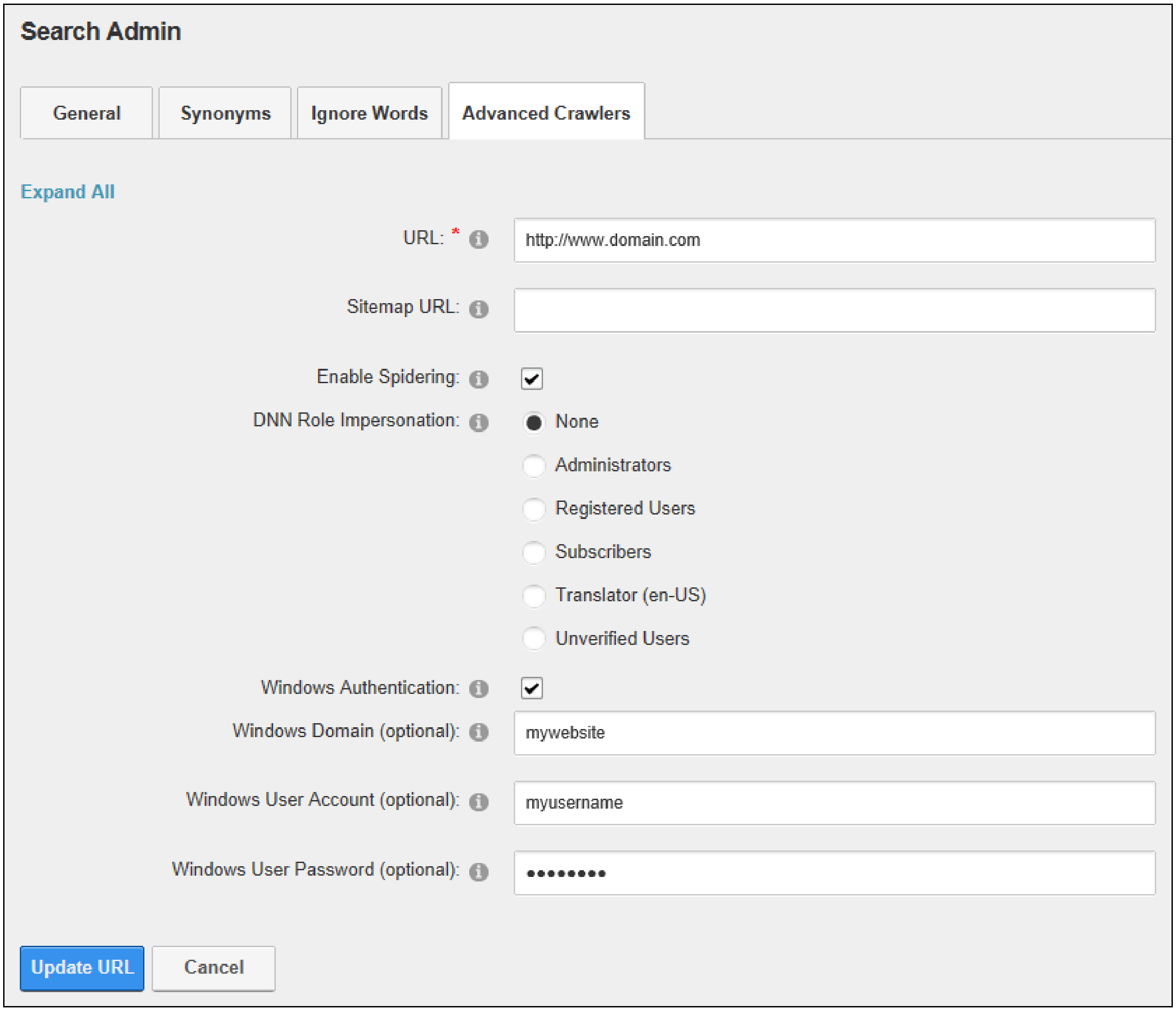
Tip: Always point to the default URL. E.g. http://www.domain.com and not http://www.-domain.com/default.aspx. This is because the spider will go to the first page you indicate, and from there it will start collecting links to all the pages in the site. The spider will eventually get to any specific page you need indexed, however by using the default URL you can ensure all pages are indexed.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **URL Paths** section.
4. Click the **Add URL** button.

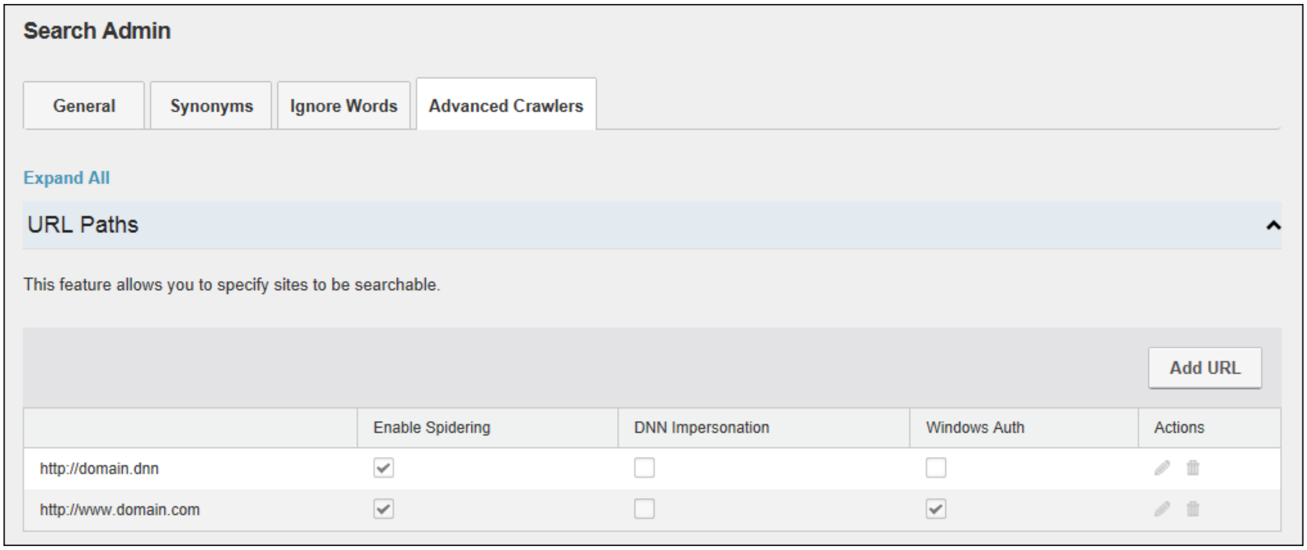


5. In the **URL** text box, enter the URL of the site to be indexed by the Search Crawler (DNN Search Engine) using a spider crawl (E.g. http://www.domain.com). Note: This is the only required field. All additional fields, with the exception of the DNN Role Impersonation field, can be updated at a later time.
6. The following optional settings are also available:
   1. In the **Sitemap URL** text box, enter the URL of the Sitemap to be used.
   2. At **Enable Spidering**, select from these options:
      - Mark the check box to enable indexing of this URL. This creates a new index for this URL when the Schedule next runs. or whenever a SuperUser chooses to run indexing.
      - Unmark the check box to disable indexing of this URL. Any existing index will still be available for searches.

3. At **DNN Role Impersonation**, select the type of role that the spider should use to index your site - OR - Select **None** to index content for all roles.
4. At **Windows Authentication**, select from these options:
   - Mark the check box to enable Windows Authentication (See notes below for more information) and then set any of these optional settings:
     1. In the **Windows Domain (optional)** text box, enter the Computer Domain of the user account that will be used.
     2. In the **Windows User Account (optional)** text box, enter the Login Name (user account) that will be used.
     3. In the **Windows User Password (optional)** text box, enter the Password that will be used.
   - Unmark the check box to disable Windows Authentication.



7. Click the **Update URL** button. The URL (if valid) will automatically be added to the list of available URL's that the spider will index by default.



Notes on Windows Authentication

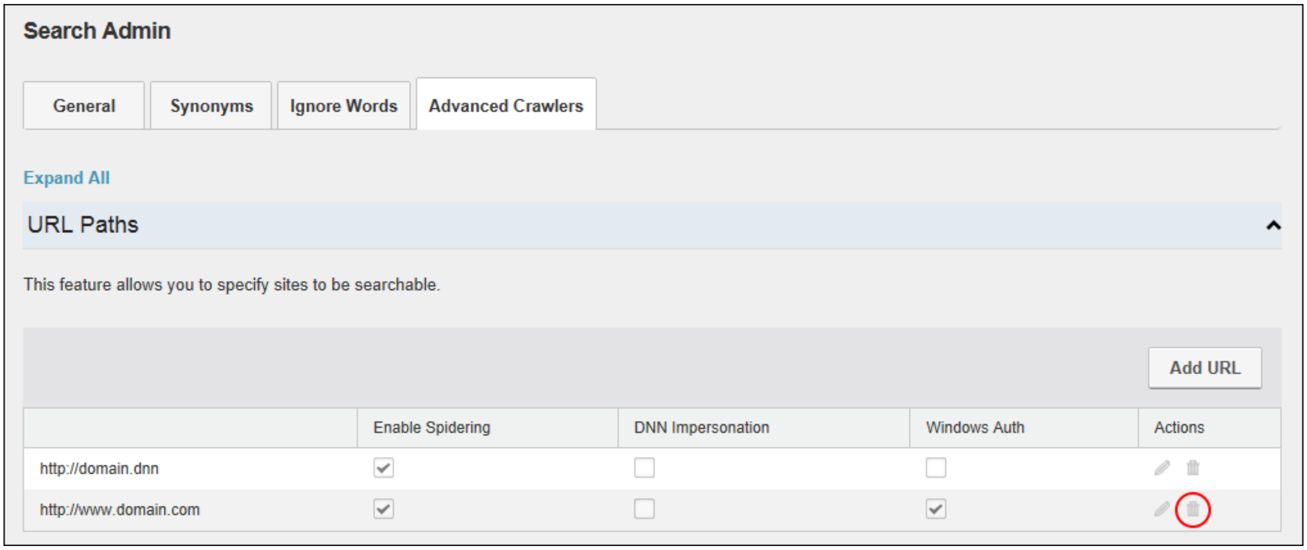
If the site you want to index is an intranet (technically: if the IIS authentication methods does not allow Anonymous Access, and requires Integrated Windows Authentication as shown in the below image), then you will want to enable Windows Authentication.

Clicking on the Windows Authentication check box of the SearchCrawlerAdmin module, will tell the spider to use the Default User Credentials that are stored on the server where Search Crawler (DNN Search Engine) is installed. This will work in most cases where the Search Crawler (DNN Search Engine) modules are installed in the same server as the site you want to spider. If you want to index a remote site, or you simply need to use a specific user, then you can fill in the rest of the information such as Windows Domain, Windows User Account and Windows User Password.

Deleting URL's from Indexing

How to permanently delete one or more URL's from the list of spidered sites using the Search Admin module.

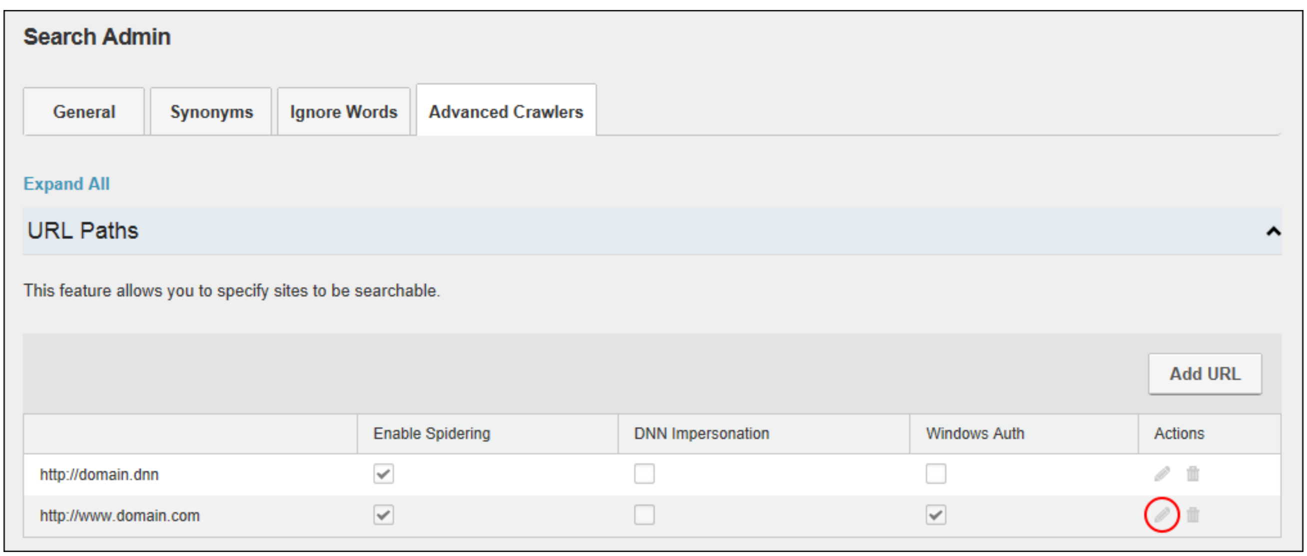
1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **URL Paths** section.
4. Click the **Delete URL** button beside the URL to be deleted and then click the **Yes** button to confirm.



Editing Indexed URL's

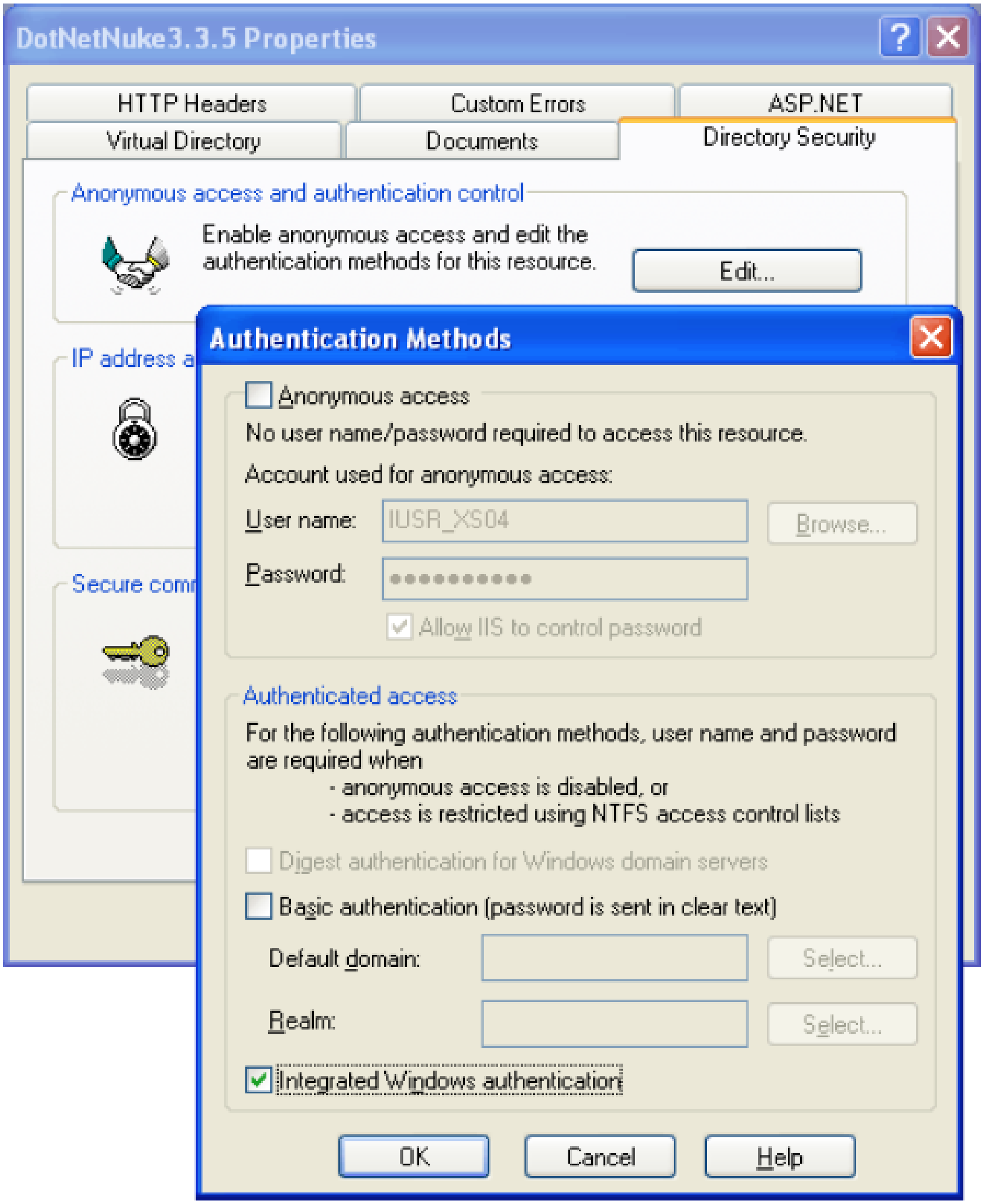
How to manage the URL's and functionality related to the specific sites and/or directories to be indexed using the Search Admin module.

1. Navigate to Admin > Advanced Settings > **Search Admin** - OR - Go to a Search Admin module.
2. Select the **Advanced Crawlers** tab.
3. Expand the **URL Paths** section where each of the indexed URL's are listed.
4. Click the **Edit** button beside the URL to be edited.



5. Edit one or more fields as required.
6. Click the **Update URL** button.

Notes on Windows Authentication: If the site you want to index is an intranet (technically: if the IIS authentication methods does not allow Anonymous Access, and requires Integrated Windows Authentication as in the below image), then you want to enable Windows Authentication.



Note: Clicking on the Windows Authentication check box of the SearchCrawlerAdmin module will tell the spider to use the Default User Credentials that are stored on the server where Search Crawler (DNN Search

Engine) is installed. This will work in most cases where the Search Crawler modules are installed in the same server as the site you want to spider. If you want to index a remote site, or you simply need to use a specific user, then you can fill in the rest of the information such as Windows Domain, Windows User Account and Windows User Password.

Important. If the site you want to spider is a DNN site using the ADSI authentication provider, then the steps above are still valid, but will only be applicable if the SearchCrawlerAdmin module is installed in the same server or network as the site you want to spider.

Security

About Security

This section details the Evoq Content tools available to increase the security of your site.

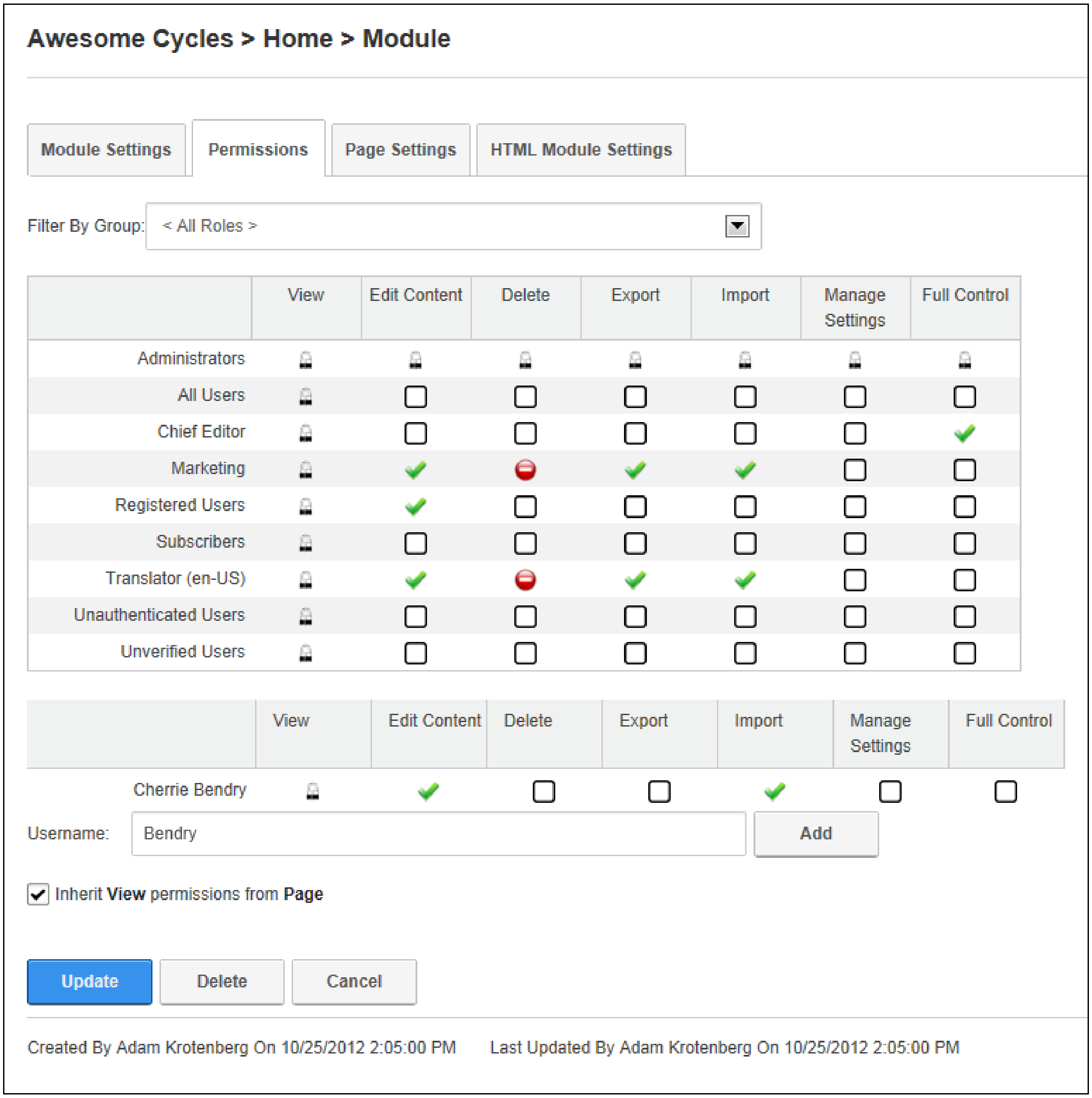
Module Permissions

About Module Permissions

Page Editors, Administrators and SuperUsers can configure access to view, edit and manage module content by roles and/or usernames. Evoq Content and Evoq Content Enterprise provide seven permissions for fine grain module management. In this section you will find an overview of the different module permissions available. For details on setting these permissions, See "Setting Module Permissions"

Here is the full list of module permissions available in Evoq Content and Evoq Content Enterprise:

- **View**: Users can view the module on the page.
- **Edit Content**: Users can edit the module content.
- **Delete**: Users can delete the module through the module actions menu.
- **Export**: Users can export the module content using the module actions menu.
- **Import**: Users can import the module content using the module actions menu.
- **Manage Settings**: Users can change access the module settings page for this module and manage all setting excluding permissions.
- **Full Control**: Users have full administrator rights for the module.
- **Inherit View Permissions From Page**: Select this check box to inherit the View permissions for the module from the Page permissions. This check box is selected by default, and it allows all modules to be made visible to visitors who are allowed to view the page.
  - Module Edit permissions can be inherited from Page permissions. A user that is granted Full Control or Add Content permissions at the Page level automatically inherits Full Control at the Module level (unless permissions have been explicitly Denied at the module level).
  - Module permissions that have been explicitly Denied will override Page permissions.



Module Permissions in Evoq Content and Evoq Content Enterprise

Setting Module Permissions

How to set grant or deny permission to view or manage a module to a role or for an individual user using DNN Evoq. Permission can be set to view, edit, delete, import, export or manage settings for a module as well as full control to perform all module management tasks. Additional permission options are available on some modules such as the Events and Feedback modules.

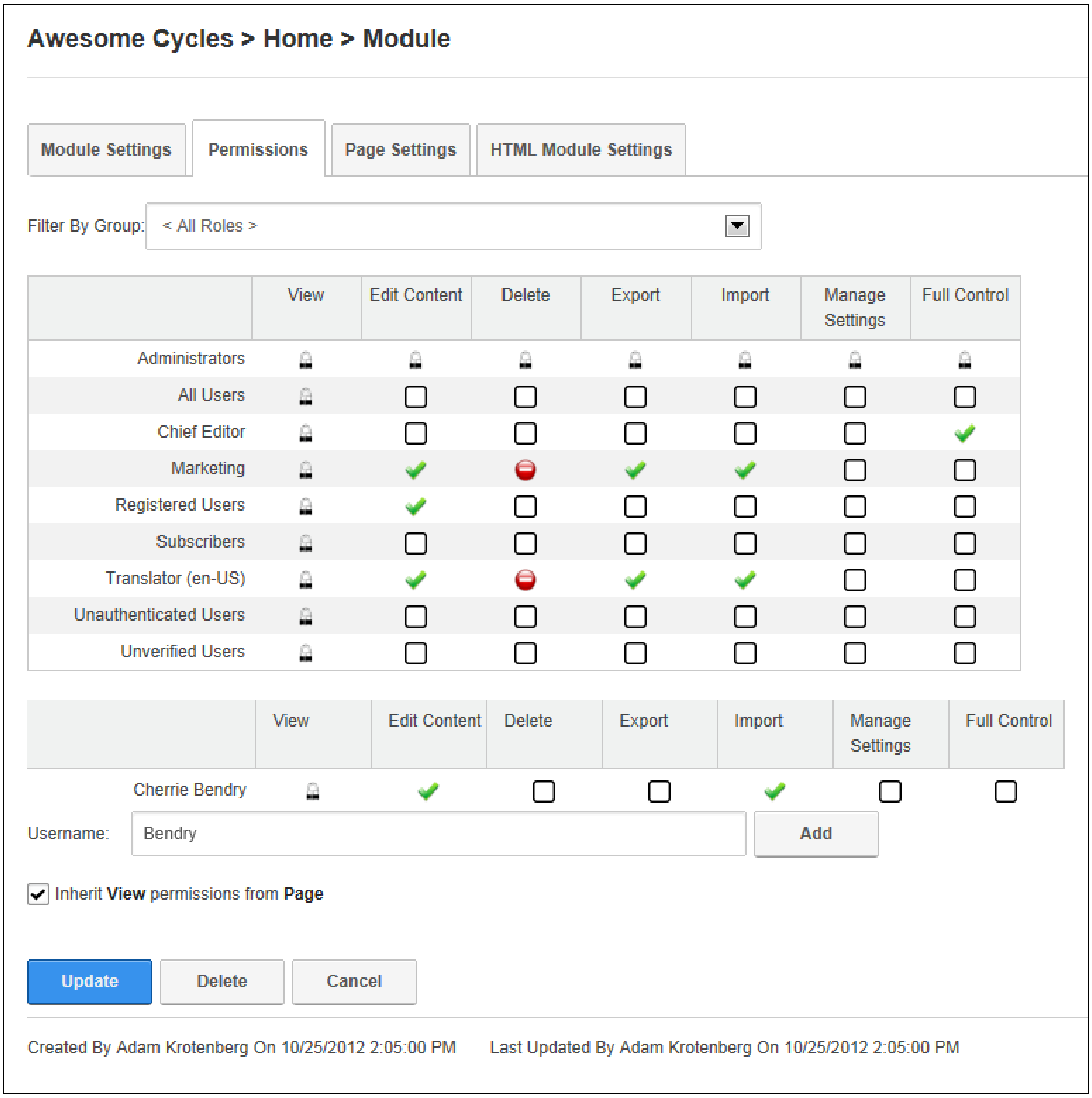
1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **Permissions** tab.
3. **Optional.** In the **Username** text box, enter the username of the user that you want to grant or deny module permissions to and then click the Add link. Repeat this step to add additional usernames.
4. **Optional.** At **Filter By Group**, select from the following options:
5. **< All Roles >**: Select to view all roles (both global and group roles) in one single list.
6. **< Global Roles >**: Select to view all roles which are not associated with a Role Group. This includes Administrators, All Users, Registered Users, and Unauthenticated Users.
7. **[Role Name]**: Select the name of a Role Group to view the roles within that group.
8. **Optional.** At **Inherit View permissions from Page**, select from these options:
   - Mark the check box if the users who are authorized to view the page this module is located on are always authorized to view this module. This displays the **Security Locked** image in the View column indicating that the view security is 'locked'. Skip to Step 10.
   - Unmark the check box to set different permissions for viewing this module than set for the page it is located on. If you choose to unmark this option, the check boxes at View Module will become available.
9. In the **View** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
   - **Not Specified**: Permissions are not specified. Users cannot view the module unless they belong to another role/username which has been granted permission, or are granted Full Control permissions. Note: Users with Edit Module permissions in DNN Platform cannot view the module.
   - **Permission Granted**: Users can view the module.
   - **Permission Denied**: Users cannot view the module, unless Full Control is granted.
10. In the **Edit Content** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified. Users cannot edit content unless they belong to another role/username which has been granted permission, or are granted Full Control permissions.
    - **Permission Granted**: Users can edit content.
    - **Permission Denied**: Users cannot edit content, unless Full Control is granted.

9. In the **Delete** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified. Users cannot delete the module unless they belong to another role/username which has been granted permission, or are granted Full Control permissions.
    - **Permission Granted**: Users can delete the module.
    - **Permission Denied**: Users cannot delete the module, unless Full Control is granted.
10. In the **Export** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified. Users cannot export the module unless they belong to another role/username that has been granted permission, or are granted Full Control permissions.
    - **Permission Granted**: Users can export the module.
    - **Permission Denied**: Users cannot export the module, unless Full Control is granted.
11. In the **Import** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified. Users cannot import the module unless they belong to another role/username that has been granted permission, or are granted Full Control permissions.
    - **Permission Granted**: Users can import the module.
    - **Permission Denied**: Users cannot import the module, unless Full Control is granted.
12. In the **Manage Settings** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified. Users cannot manage module settings unless they belong to another role/username that has been granted permission, or are granted Full Control permissions.
    - **Permission Granted**: Users can manage module settings.
    - **Permission Denied**: Users cannot manage module settings, unless Full Control is granted.
13. In the **Full Control** (or **Edit Module**) column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
    - **Not Specified**: Permissions are not specified.
    - **Permission Granted**: Users have full control to view the module, manage module content and manage module settings. Note: In DNN Platform, View Module permissions must also be granted.
    - **Permission Denied**: Users are denied full control.

14. Click the **Update** button.

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

For Example: In the below screen capture, permissions to view the module are inherited from the page; permission to Edit Content has been granted to Registered Users; users in the Marketing and Translator roles can Edit, Import and Export content, however they cannot Delete content; the user Cherrie Bendry is able to Edit and Import content; and finally Chief Editors have been granted Full Control of the module.

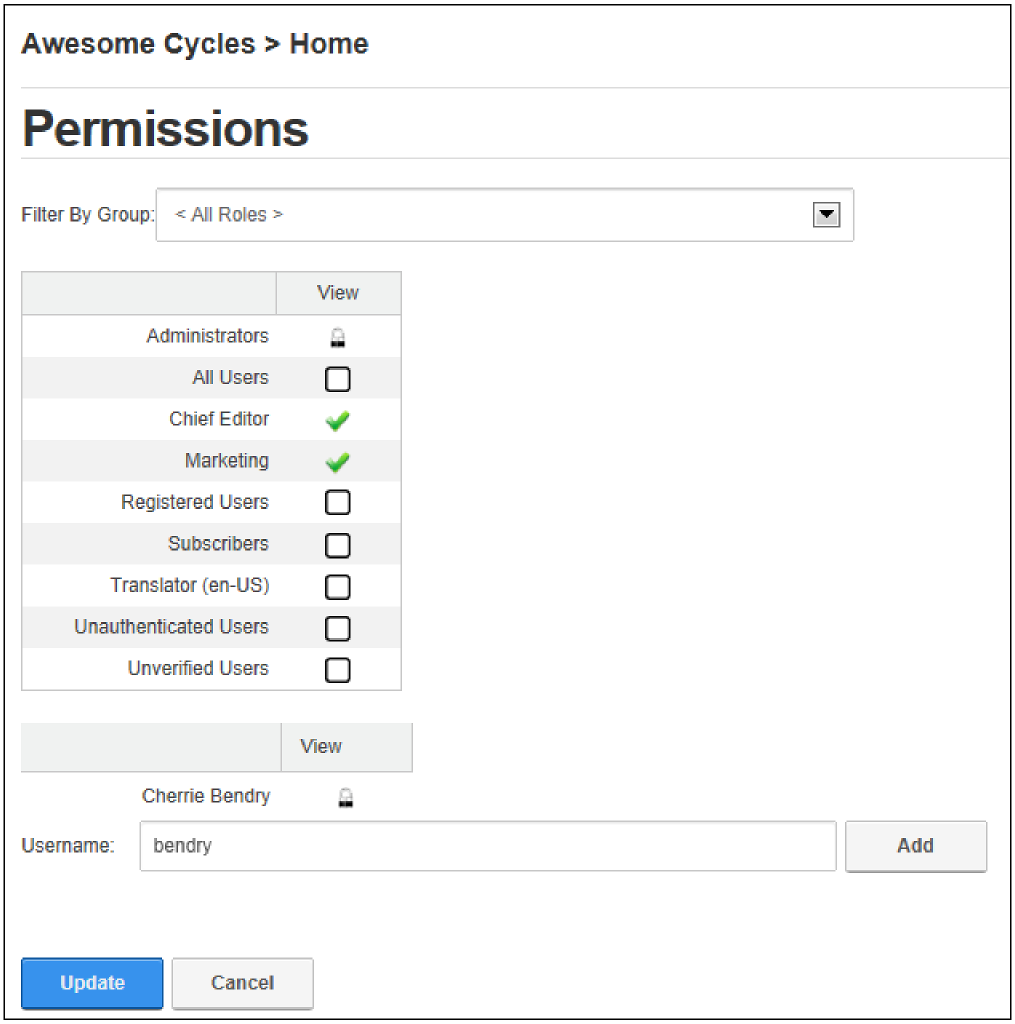


Setting Permissions for Shared Modules

How to grant module viewing permissions for modules that have been shared from another site within the same Site Group.

1. Select **Manage** > **Settings** from the module actions menu.
2. Select the **Permissions** tab.
3. **Optional.** At **Filter By Group**, select from the following options:
   - **< All Roles >**: Select to view all roles (both global and group roles) in one single list.
   - **< Global Roles >**: Select to view all roles which are not associated with a Role Group. This includes Administrators, All Users, Registered Users, and Unauthenticated Users.
   - **[Role Name]**: Select the name of a Role Group to view the roles within that group.
4. In the **View** column, click on the check box beside a role/username repeatedly until the correct permission is displayed. The following options are available:
   - **Not Specified**: Permissions to view this module are not specified. Users cannot view the module unless they belong to another role/username that has been granted permission.
   - **Permission Granted**: Users within this role can view the module.
   - **Permission Denied**: Users within this role will be denied access to view the module. This overrides any other permissions that have been granted.
5. In the **Username** text box, enter the username of a user and then click the Add link. Repeat this step to add additional usernames.
6. Click the **Update** button.

For Example: The below screen capture shows a shared module that has been set to only provide view permissions. Permission to view the module has been granted to users in the Chief Editor and Marketing roles, as well as the user Cherrie Bendry.



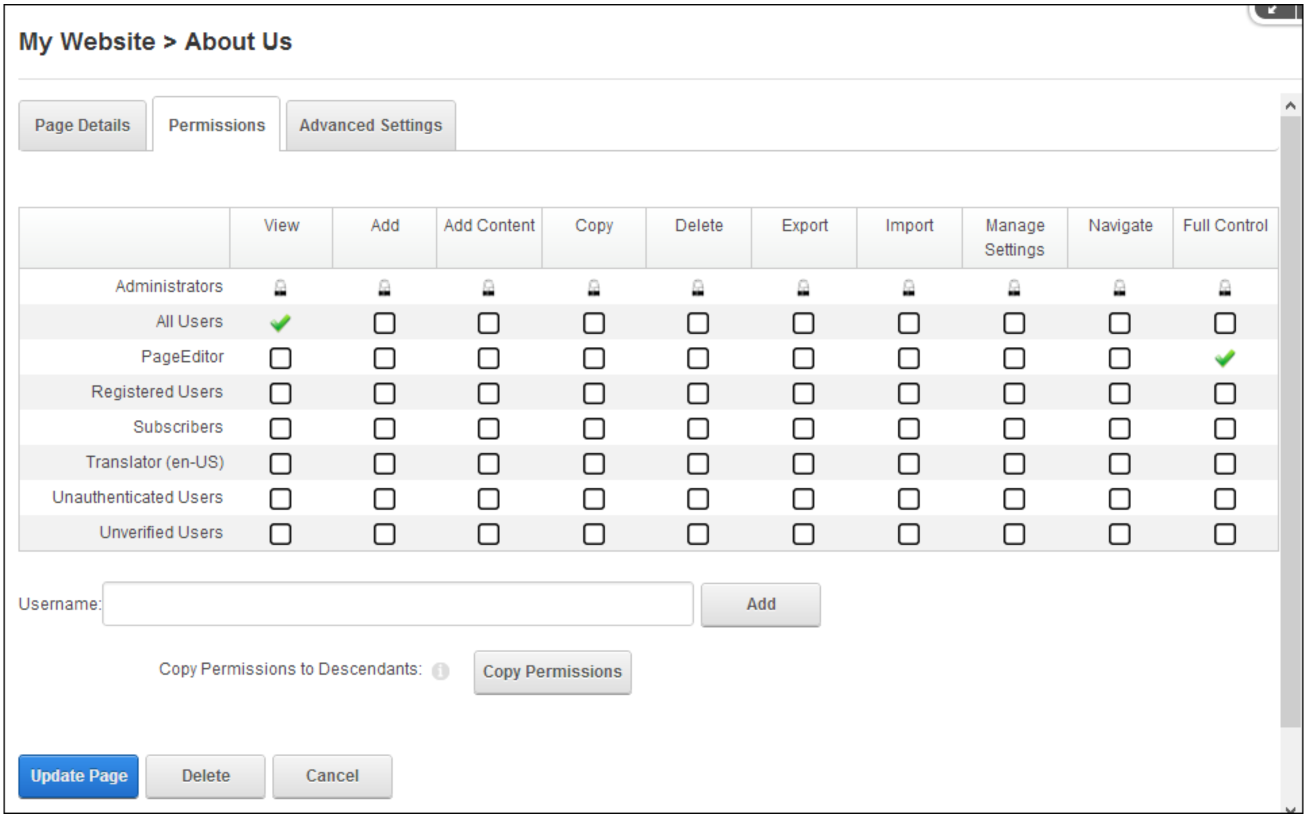
Page Permissions

About Page Permissions

How to set access to view, edit and manage pages and page content setting permissions by roles and/or usernames. This topic provides an overview of the different page permissions available. For full details, See "Setting Page Permissions (Evoq Content)"

- **View**: View permissions enable users to view the page.
- **Add**: Users with Add permissions for a page can add child pages to that page. They cannot add any parent pages, and they cannot add child pages to any other pages.

- **Add Content**: Users with Add Content permissions for a page can edit content on the page. These users can add, move and delete modules, as well as manage the content and settings for modules on the page.
- **Copy**: Users with Copy permission can make a copy any page they can view. The new page can only be a child of the page they have copy permissions for.
- **Delete**: Users with Delete permissions can delete the page. If the page has child pages they are also deleted when the parent is deleted, however the user does not automatically have Delete permissions for these child pages.
- **Export**: Users with Export permissions can export the page.
- **Import**: Users with Import permissions can import a page.
- **Manage Settings**: Users with Manage Settings permissions can change the page settings. Users can edit all of the settings on the Settings page, except for the permissions section which will not be visible.
- **Navigate**: Users with Navigate permissions can view a page in the navigation menu. Users can have this permission without view permissions, in which case they will not be able to view any content on the page but the page will be visible in the menu.
- **Full Control**: Users with Full Control permissions have full administrative rights for the page.



Page Permissions

Setting Page Permissions (Evoq Content)

How to set page permissions by username and roles. Note: Access to view and set page permissions are only available to Administrators and users with Manage Settings or Full Control permissions for the page.

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

1. Select **Page Permissions** from the Edit Page menu on the **Control Bar**.
2. At **Username**, enter the username of a user that you want to grant or deny page permissions to, and then click the Add link.

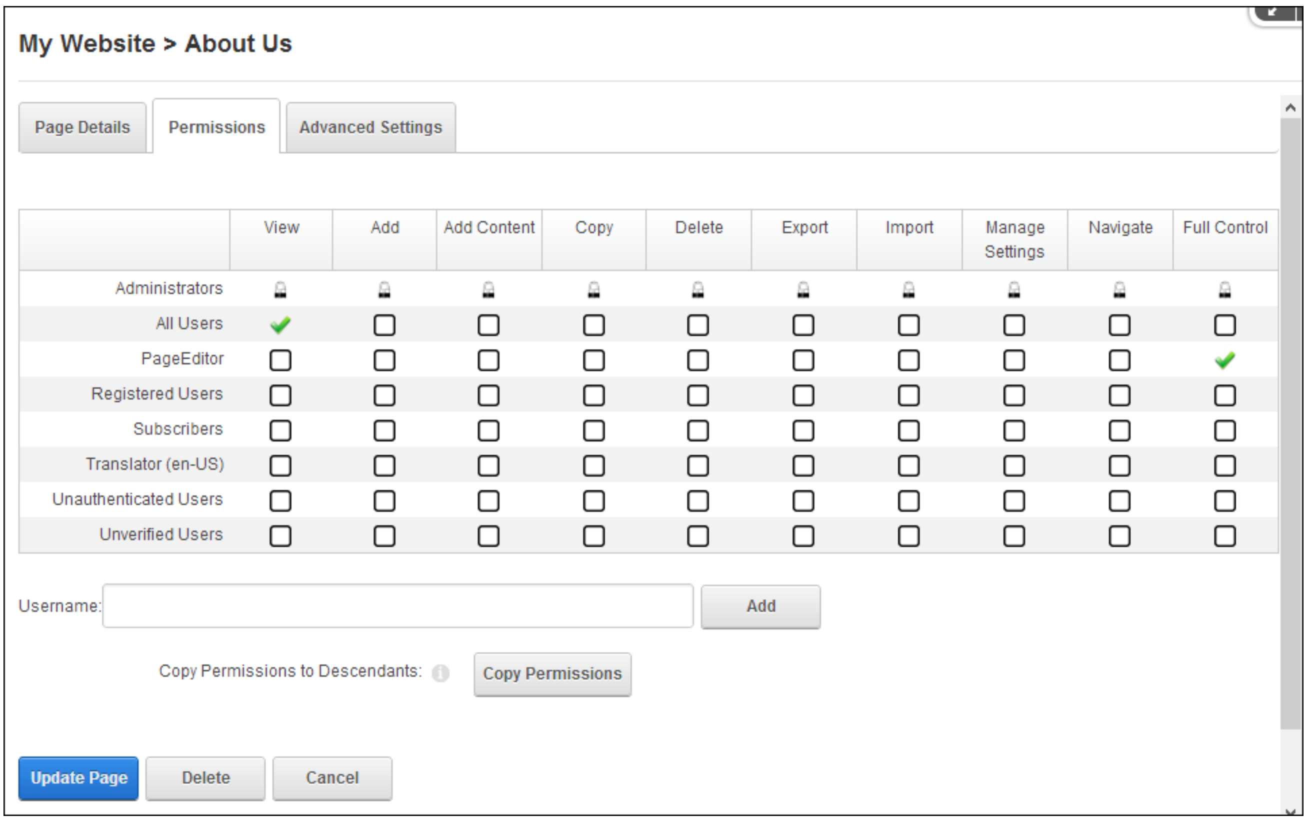
3. **Optional.** At **Filter By Group**, select from the following options:
   - **< All Roles >**: Select to view all roles (both global role and roles groups) in one single list.
   - **< Global Roles >**: Select to view all roles which are not associated with a Role Group. E.g. Administrators, All Users, Registered Users, and Unauthenticated Users.
   - **[Role Group Name]**: Select the name of a Role Group to view the roles within that group.
4. In the **View** column, click on the check box beside a user/role repeatedly until the correct permission is displayed.
   - **Permission Granted**: Permission to view the page is granted.
   - **Permission Denied**: Permission to view the page is denied, unless Full Control is granted.
   - **Not Specified**: Permissions are not specified. Users cannot view the page unless they belong to another role/username which has been granted permission, or are granted Full Control/Edit Page permissions.
5. In the **Add** column, select from these options:
   - **Permission Granted**: Users with Add permissions for a page can add child pages to that page. They cannot add any parent pages, and they cannot add child pages to any other pages.
   - **Permission Denied**: Permission to add child pages is denied, unless Full Control is granted.
   - **Not Specified**: Permissions are not specified. Users are unable to add pages unless they belong to another role/username which has been granted permission.
6. In the **Add Content** column, select from these options:
   - **Permission Granted**: Users with Add Content permissions for a page can edit content on the page. These users can add, move and delete modules, as well as manage the content and settings for modules on the page.
   - **Permission Denied**: Permission to add and manage module content is denied, unless Full Control is granted.
   - **Not Specified**: Permissions are not specified. Users are unable to view the page unless they belong to another role/username which has been granted permission.
7. In the **Copy** column, select from these options:
   - **Permission Granted**: Users with Copy permission can make a copy any page they can view. The new page can only be a child of the page they have copy permissions for.
   - **Permission Denied**: Permission to copy the page is denied, unless Full Control is granted.

- ☐ **Not Specified**: Permissions are not specified. Users are unable to copy the page unless they belong to another role/username which has been granted permission.

8. In the **Delete** column, select from these options:
   - ✔ **Permission Granted**: Users with Delete permissions can delete the page. If the page has child pages they are also deleted when the parent is deleted, however the user does not automatically have Delete permissions for these child pages.
   - ⛔ **Permission Denied**: Permission to delete the page is denied, unless Full Control is granted.
   - ☐ **Not Specified**: Permissions are not specified. Users are unable to delete the page unless they belong to another role/username which has been granted permission.
9. In the **Export** column, select from these options:
   - ✔ **Permission Granted**: Users with Export permissions can export a page.
   - ⛔ **Permission Denied**: Permission to export the page is denied, unless Full Control is granted.
   - ☐ **Not Specified**: Permissions are not specified. Users are unable to export the page unless they belong to another role/username which has been granted permission.
10. In the **Import** column, select from these options:
    - ✔ **Permission Granted**: Users with Import permissions can import a page.
    - ⛔ **Permission Denied**: Permission to import the page is denied, unless Full Control is granted.
    - ☐ **Not Specified**: Users cannot import the page unless Full Control/Edit permission is granted.
11. In the **Manage Settings** column, select from these options:
    - ✔ **Permission Granted**: Users with Manage Settings permissions can change the page settings. Users can edit all of the settings on the Settings page, except for the permissions section which will not be visible.
    - ⛔ **Permission Denied**: Permission to manage settings the page is denied, unless Full Control is granted.
    - ☐ **Not Specified**: Permissions are not specified. Users are unable to manage settings for the page unless they belong to another role/username which has been granted permission.
12. In the **Navigate** column, select from these options:
    - ✔**Permission Granted**: Users with Navigate permissions can view a page in the navigation menu. Users can have this permission without view permissions, in which case they will not be able to view any content on the page but the page will be visible in the menu.
    - ⛔ **Permission Denied**: Permission to navigate to the page is denied, unless Full Control is granted.

- **Not Specified**: Permissions are not specified. Users are unable to navigate to the page unless they belong to another role/username which has been granted permission.

13. In the **Full Control** (or **Edit Page**) column, select from these options:
    - **Permission Granted**: Users with Full Control permissions have full administrative rights for the page. This permission is the same as the Edit Page permission in the DNN Platform. This role overrides other settings.
    - **Permission Denied**: Permission to delete the page is denied, unless Full Control is granted.
    - **Not Specified**: Permissions are not specified.
14. Click the **Update Page** button.



Setting page permissions

Related Topics:

Mobile Devices Support

About Mobile Devices Support

DNN empowers business people, developers and designers to quickly create and update mobile versions of their websites. DNN allows you to create either a separate Standalone Mobile Site (See "Creating a Standalone Mobile Site") or a MicroSite (See "Creating a MicroSite") that is a part of your main site. Once you've created your mobile site, you can create redirection paths for different mobile devices.

To preview your mobile device site, Evoq Content and Evoq Content Enterprise customers can use the emulator on the Control Panel. DNN Platform users can use an emulator (E.g. http://www.electricplum.com/dlsim.html) to emulate the experience of your site visitors.

Related Topics:

- See "Creating a MicroSite"
- See "Creating a Standalone Mobile Site"
- See "Displaying/Hiding Summary"
- See "About the Mobile Skin"

About the Mobile Skin

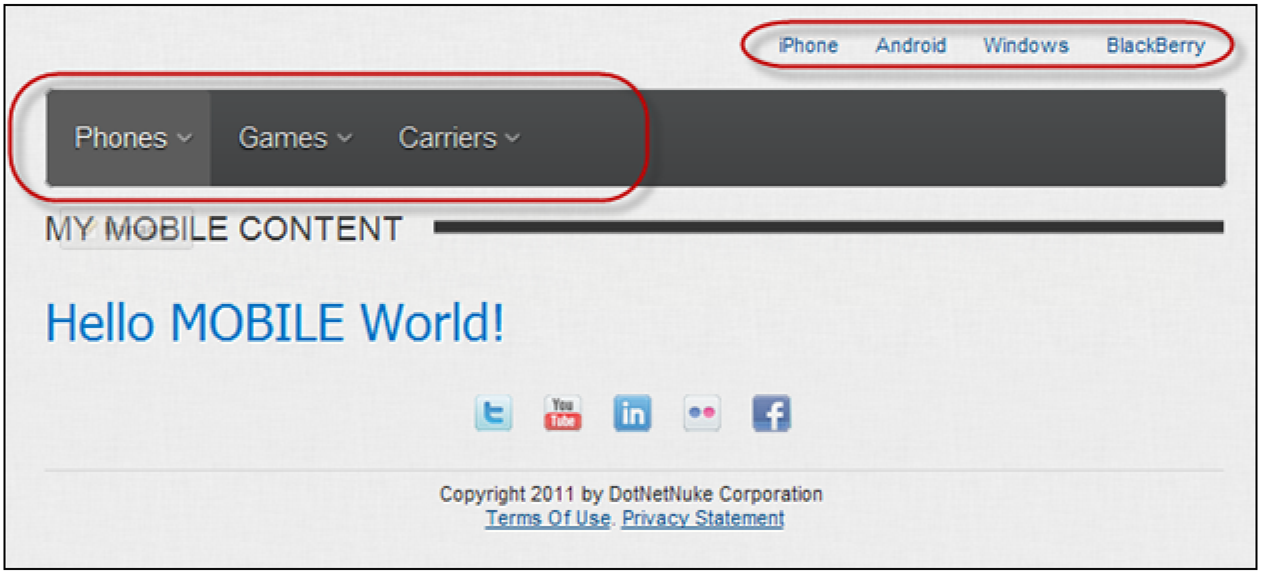
A mobile site skin package called DotNetNuke.DarkKnightMobile is included with DotNetNuke. These skins are suitable for use for a mobile website. This skin package includes skin objects appropriate for an independent mobile website and skin objects that are appropriate for a mobile microsite.

Mobile Friendly Menu

The mobile friendly skin will present the website menu in two different styles in order to maximize the viewing experience on mobile devices.

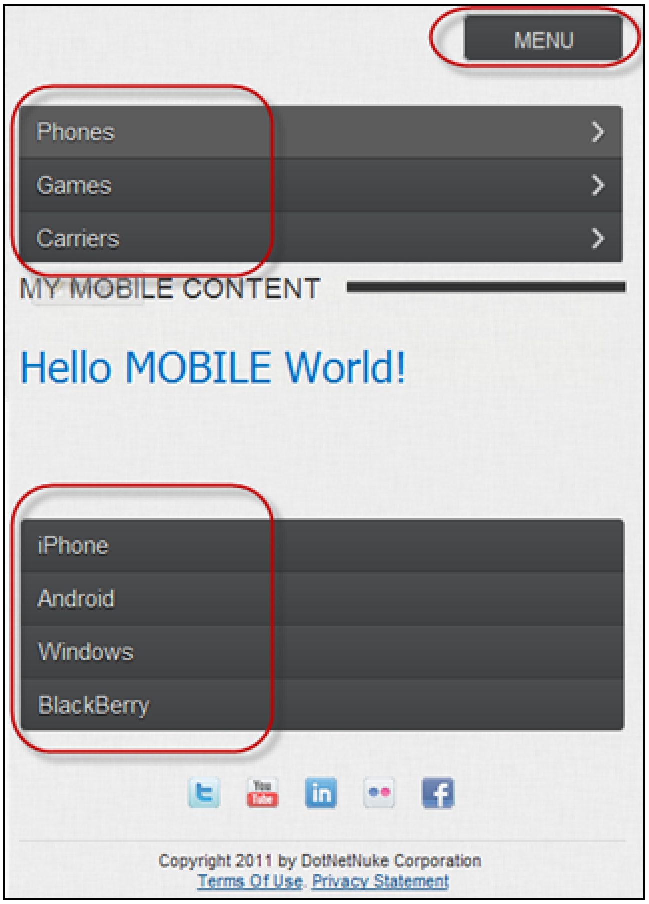
Landscape Mode

For devices with a wide aspect ratio, the menu will show across the top of the page with the direct children pages showing as links above the main menu.



Portrait Mode

For devices with narrower aspect ratio, the menu will initially be hidden with a button which will expand to show the top level pages. Direct child pages will be shown in a stacked styled-menu at the bottom of the page.

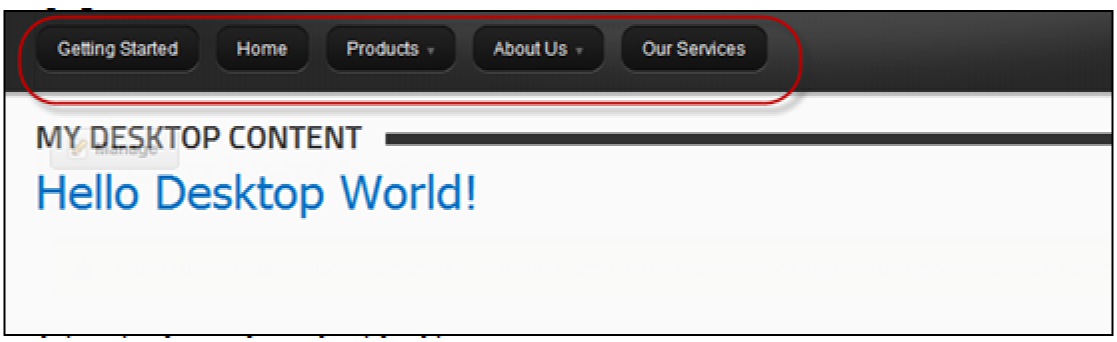


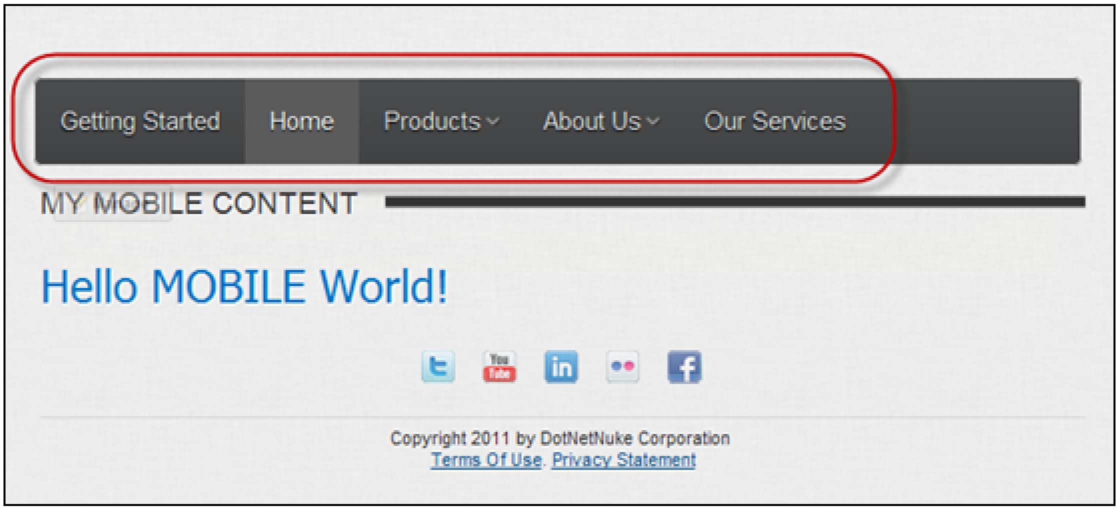
Mobile Website

The mobile skin package will contain two types of mobile friendly skins, one for use with standalone mobile websites and one for use with microsites. The only difference between the two types of skins is what shows in the menu.

Standalone Mobile Website

Using the **DarkKnightMobile - Home** and **DarkKnightMobile - Interior** page skins. All pages of the website are shown in the mobile skin menu.



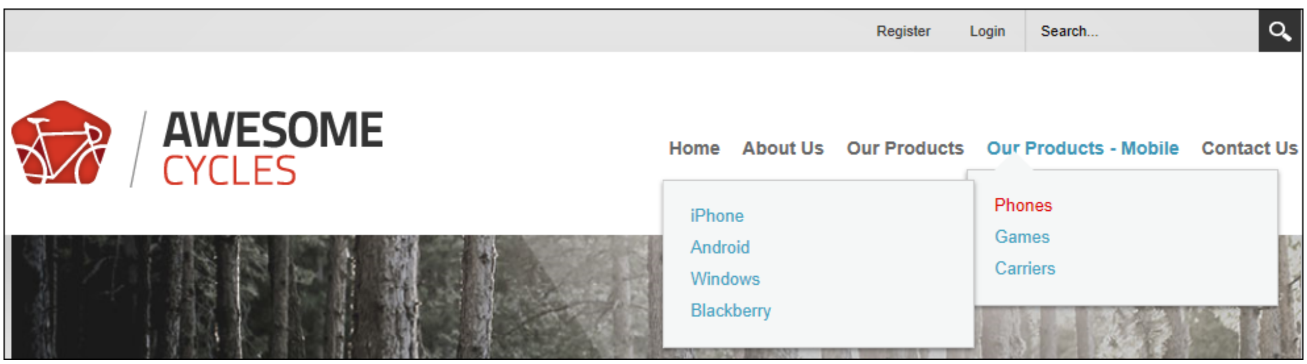


Website using DarkKnightMobile Skin for standalone mobile website shows ALL pages

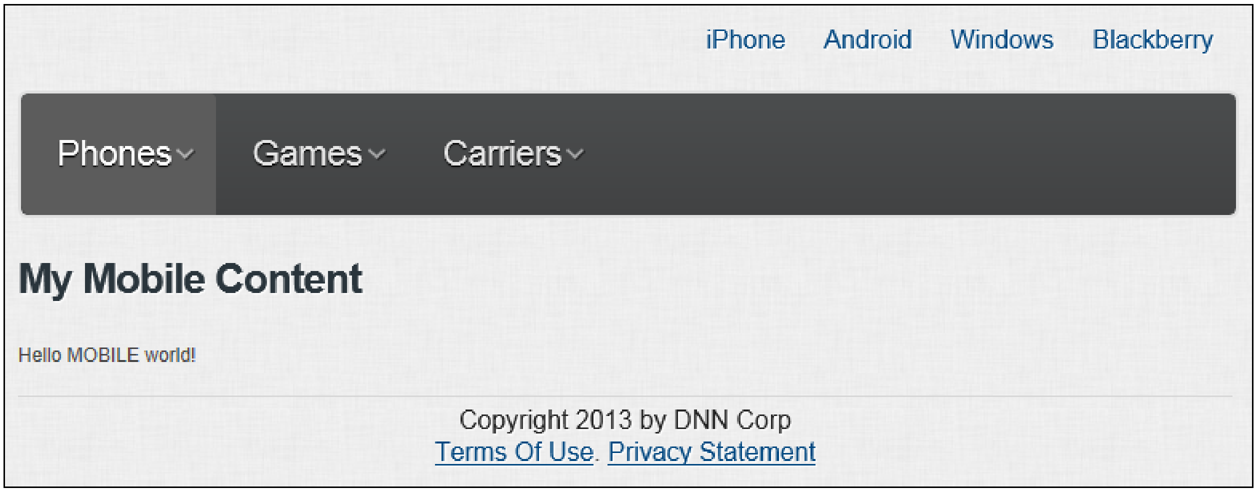
MicroSite

Using the **DarkKnightMobile - Microsite_Home** and **DarkKnightMobile - Microsite_Interior** page skins.

Only child pages of the parent mobile page will show in the mobile skin menu.



Products - Mobile is our parent mobile page for this MicroSite



Mobile menu only shows the child pages of the Products-Mobile parent mobile page

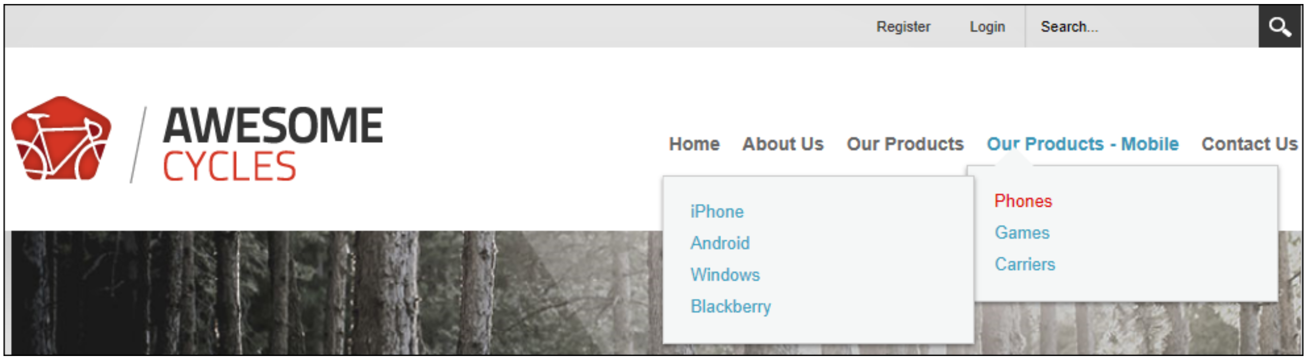
Creating a MicroSite

If you want to manage your mobile device web presence from a single site, you can create a MicroSite that forms part of your main site but is only visible to mobile device users. A MicroSite consists of a single parent page and multiple child pages that can be created and managed from your main site in the same way as you would normally create site pages.

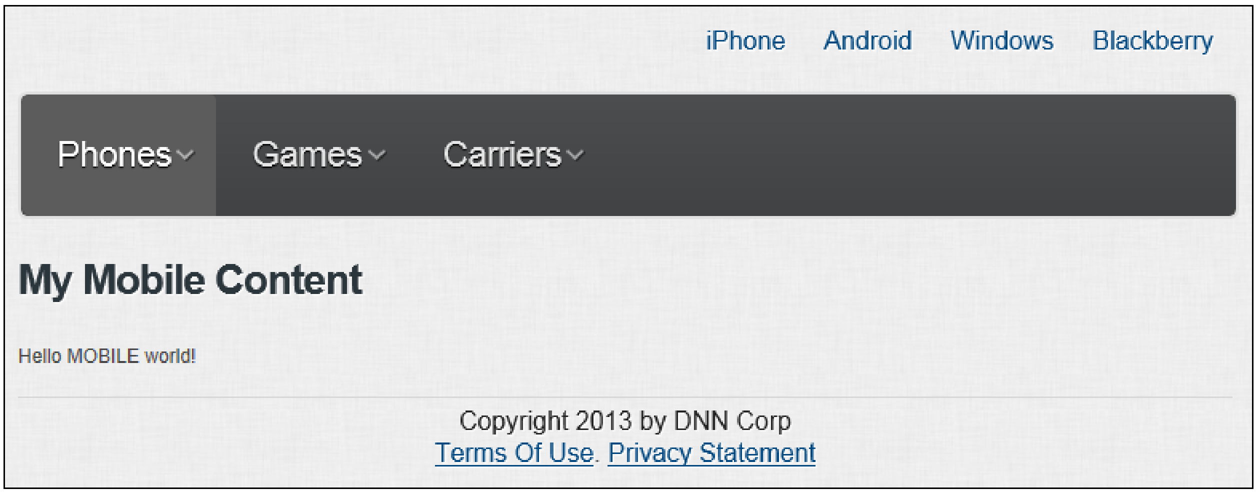
Here's how to build a MicroSite:

1. Add a new page to your current site, ensuring you choose the **DarkKnightMobile - Microsite_Home** page skin. This page will be the parent page of your mobile micrometer.
2. Add one or more child pages beneath the parent page you created at Step 1, ensuring you choose the **DarkKnightMobile - Microsite_Interior** page skin.
3. Repeat Step 2 to add child pages below the child pages and complete your MicroSite structure.

In the below example, the parent page of the MicroSite is called "Products - Mobile"



Notice that when you select a child page of the MicroSite that the child page displays in the mobile skin menu.



Related Topics:

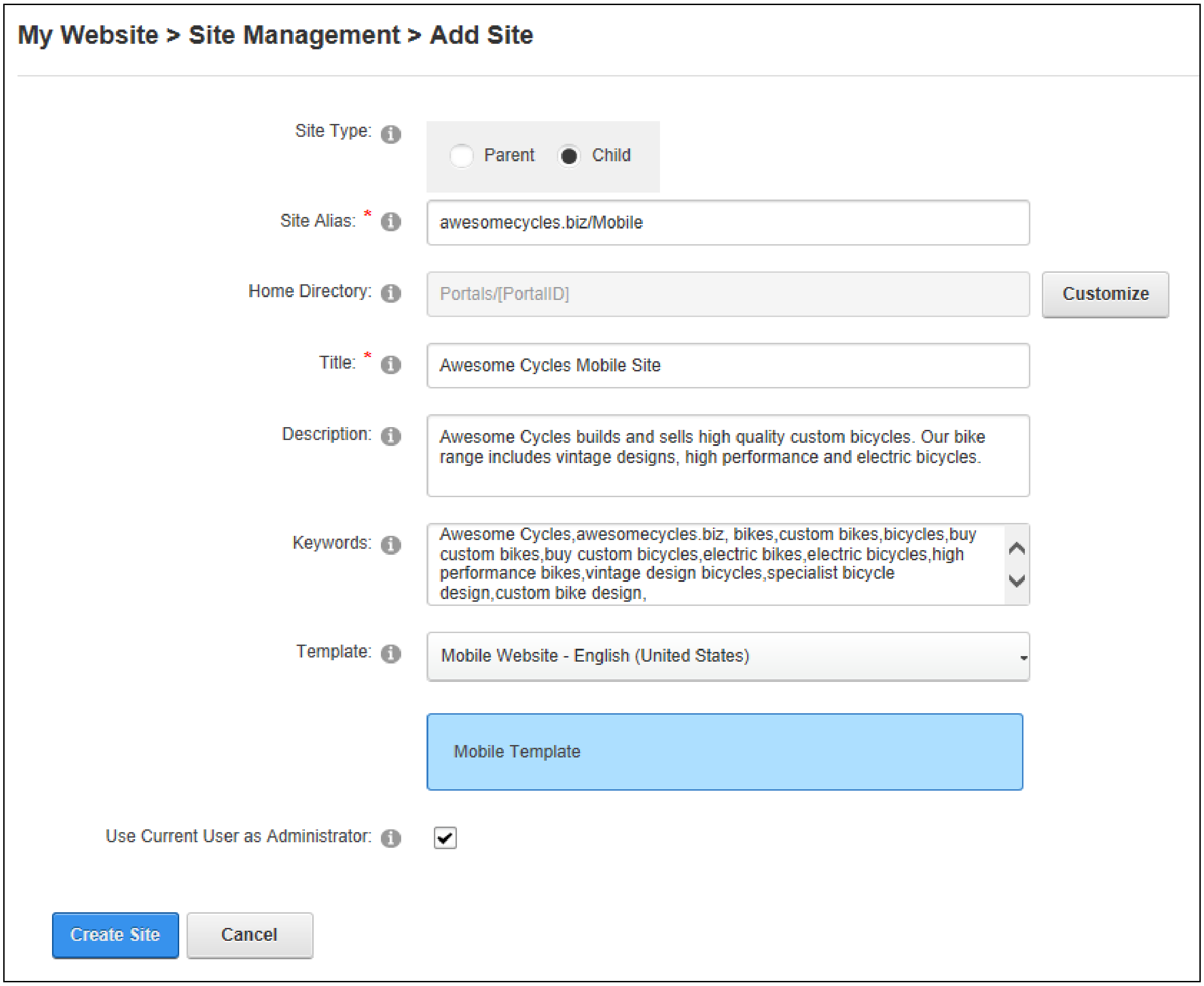
- See "About Mobile Devices Support"
- See "Displaying/Hiding Summary"
- See "About the Mobile Skin"

Creating a Standalone Mobile Site

How to create a Standalone Mobile website using the Mobile Website site template. The Mobile Website template is responsive to different screen resolutions so visitors will always have the optimal experience on their device. The template provides a flexible and adaptive layout for various devices including smartphones and tablets.

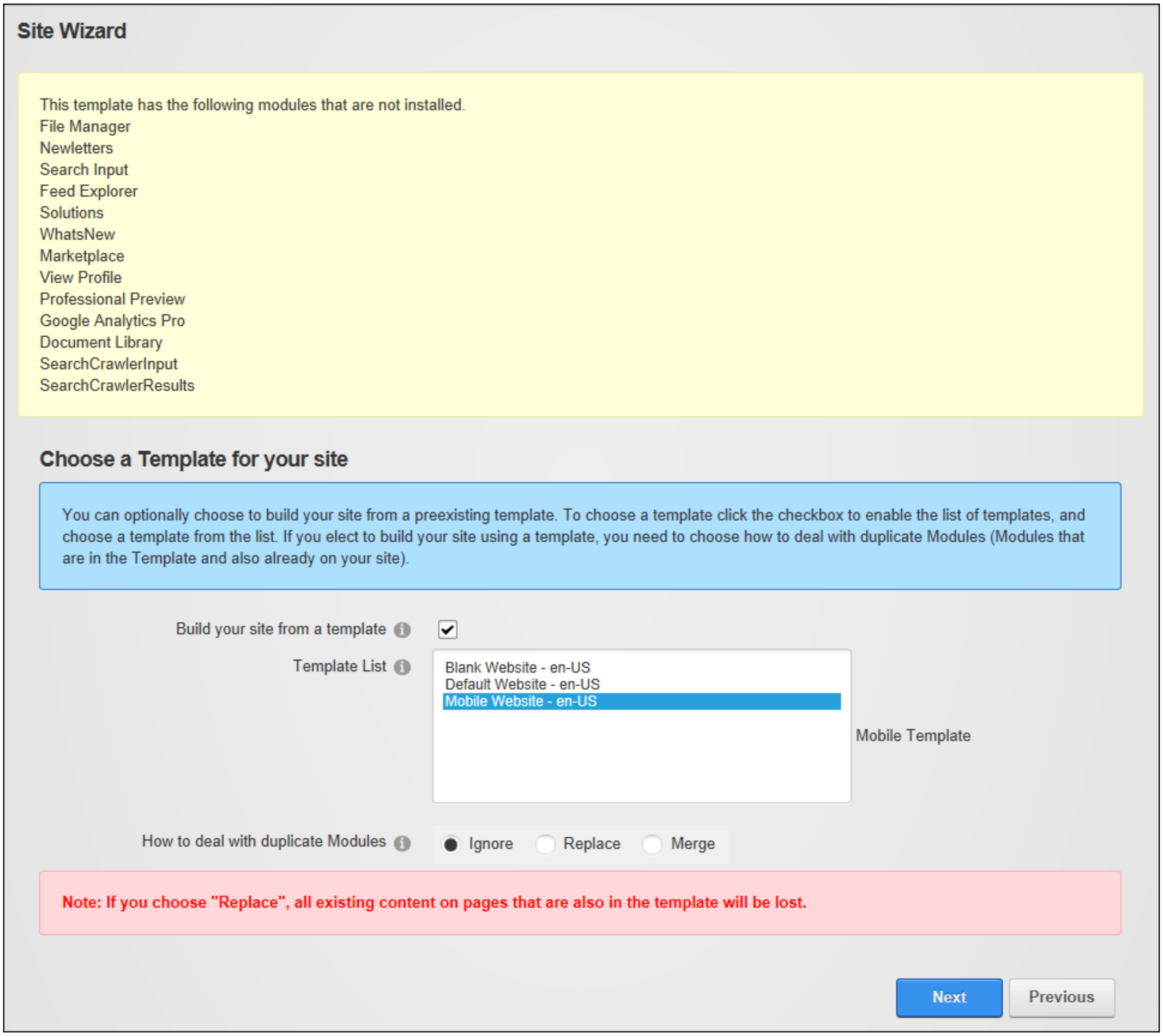
Creating a New Site (SuperUsers Only)

Add a new site to this DNN installation, ensuring you select the **Mobile Website** template when you create the site. Typically you would create a separate site for mobile devices.



Updating an existing site

Use the Admin > Site Wizard to change an existing site into a Mobile Website by selecting the Mobile Website template.



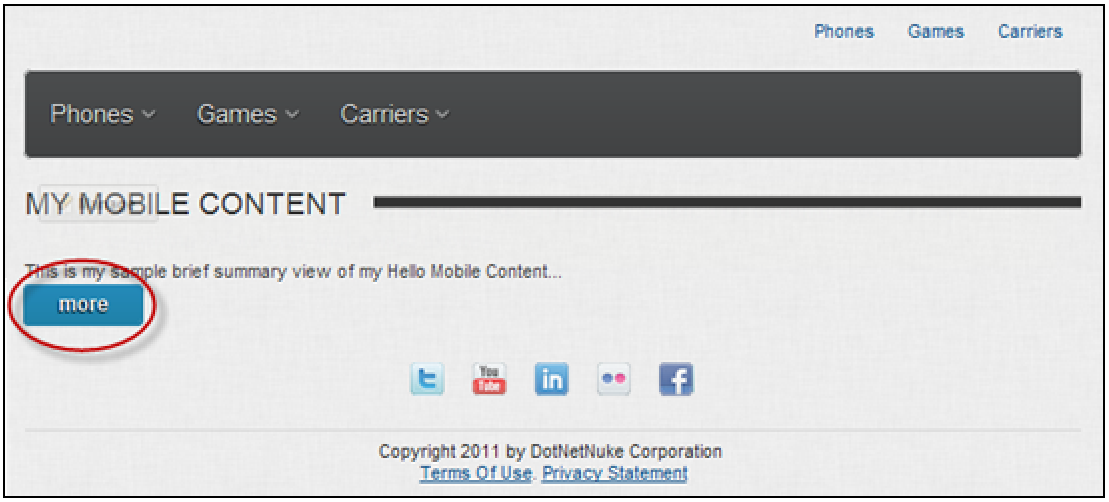
Once you've created your site pages, you must create the content. Although content cannot be shared between sites, you can use the IPortable feature of many modules to quickly copy content to the mobile device site.

Related Topics:

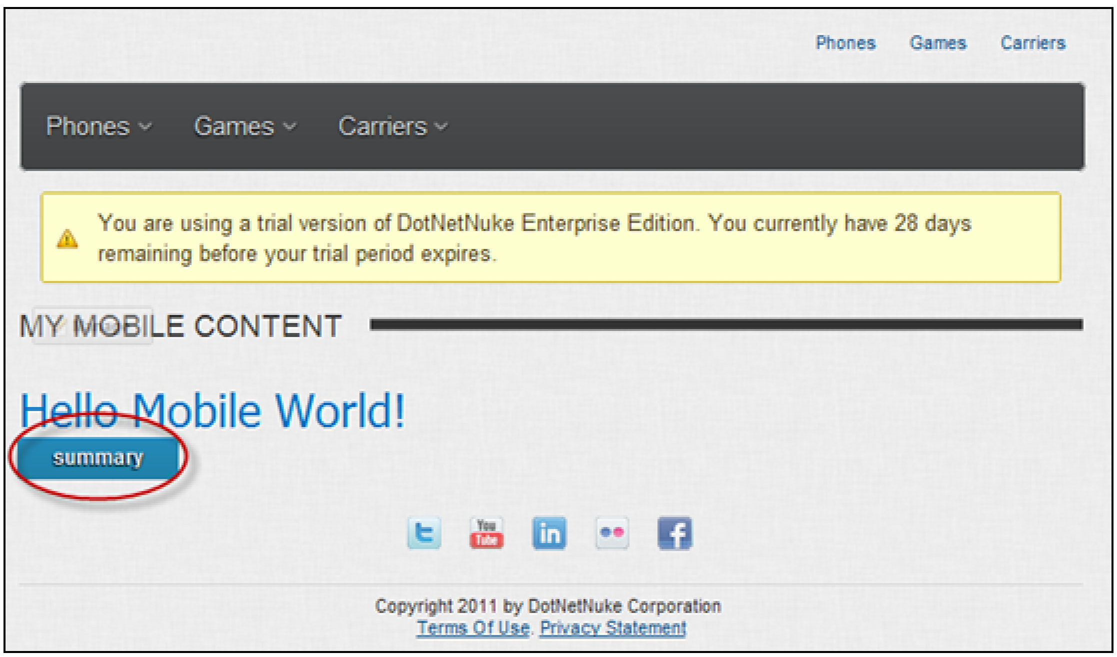
- See "About Mobile Devices Support"
- See "Displaying/Hiding Summary"
- See "About the Mobile Skin"

Summary View and Full View

If summary view for the HTML content is enabled, it will show the Summary View by default. To view the full HTML content click on the **More** button. To switch back to the Summary View click the **Summary** button.



Content shown in Summary View



Content shown in Full View

Related Topics:

- See "Displaying/Hiding Summary"

Support and Documentation

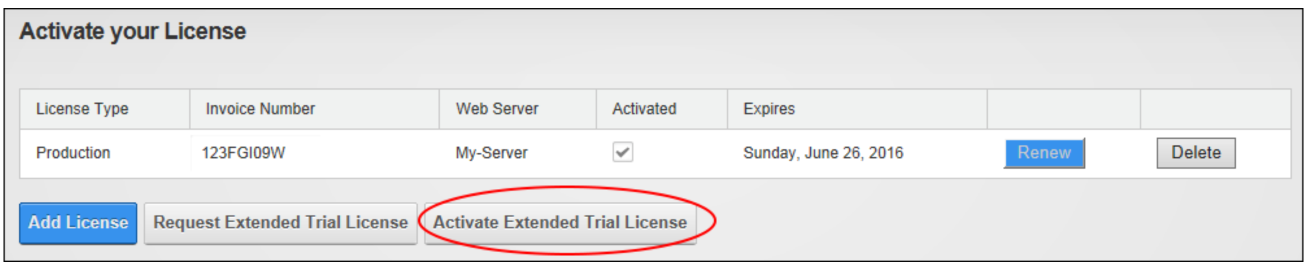
This section details the support and documentation provided with Evoq Content.

Activate Your License

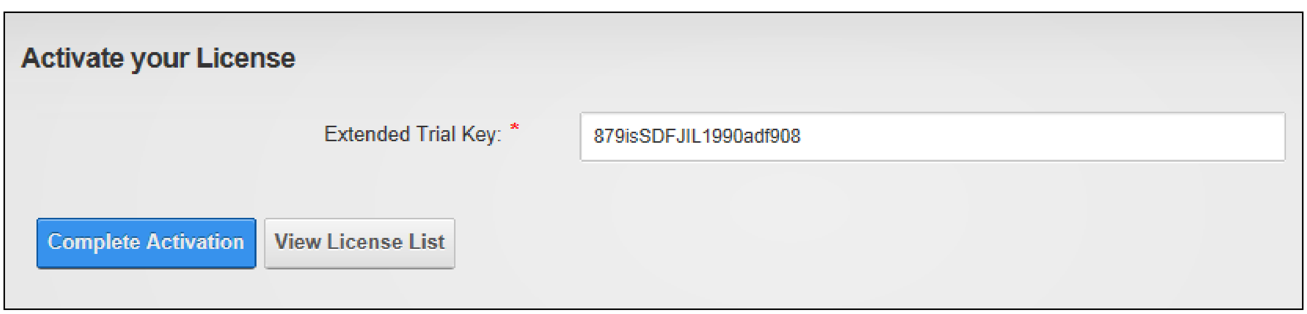
Activating an Extended Trial License

How to activate a 15 day extension to your trial license for Evoq Content and Evoq Content Enterprise. Note: You must first request an extended trial and have received the extension information before completing this tutorial. See "Requesting an Extended Trial License"

1. Navigate to Host > Advanced Settings > **Activate your License**. Details of any previously activated licenses are displayed.
2. Click the **Activate Extended Trial License** button.



3. In the **Extended Trial Key** text box, enter the trial key which was emailed to your following your request for an extension.



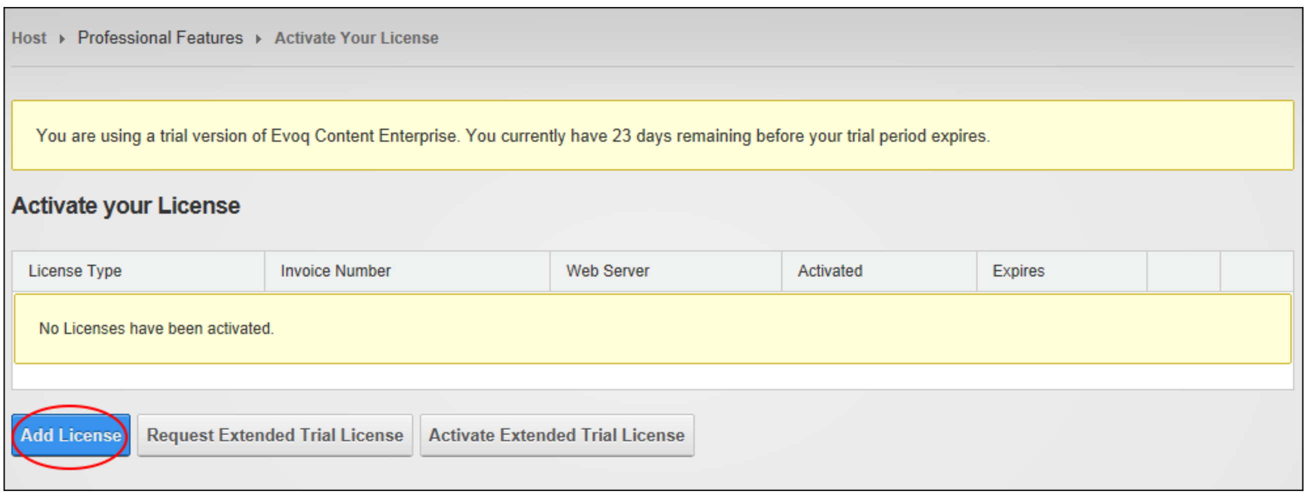
4. Click the **Complete Activation** button. A status message is now displayed. If unsuccessful, review the message and try again.

Automatically activate your DNN Licenses

The License Manager allows you to activate your Evoq Content and Evoq Content Enterprise licenses. Activating a license will ensure that you continue to receive the benefits provided to our customers. When you purchased Evoq Content or Evoq Content Enterprise, you would have received an email with your account and invoice information. If you have questions about this email please contact customersuccess@dnnsoftware.com

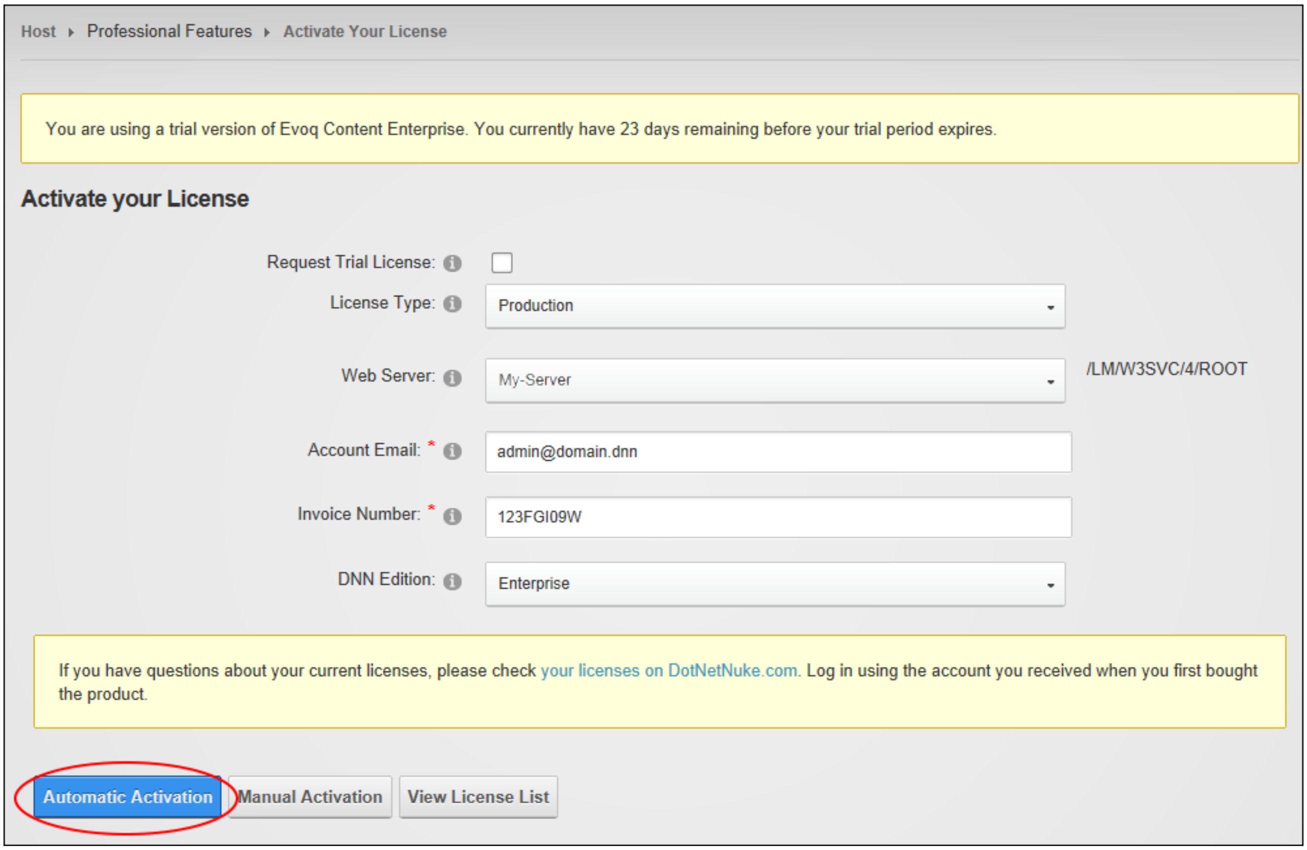
Here's how to activate a license:

1. Navigate to Host > Advanced Settings > **Activate your License** where you can see the details of any previously activated licenses.
2. Click the **Add License** button.

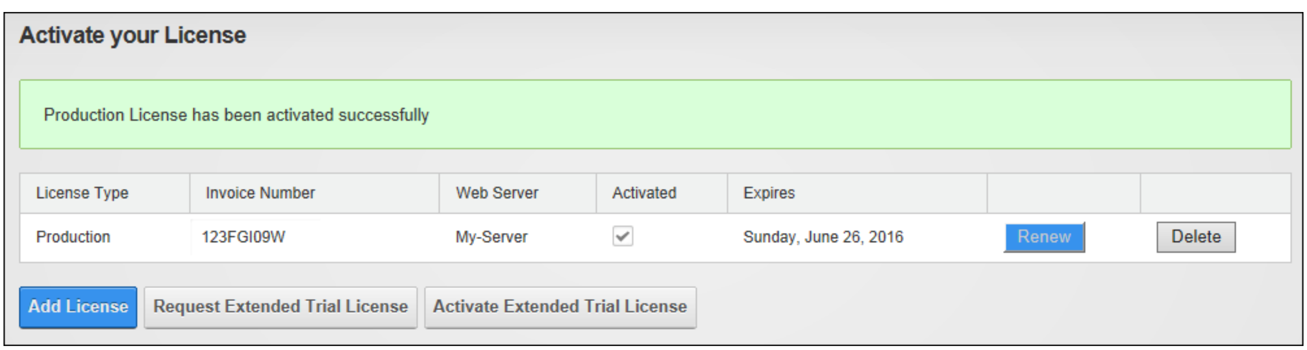


3. At **License Type** select from these options:
   - **Development**: Select if this is a development server.
   - **Staging**: Select if this is a staging server.
   - **Failover**: Select this if you're setting up a redundant or standby server.
   - **Test**: Select if this is a test server.
   - **Production**: Select if this is a production (live) server.

4. At **Web Server**, select the name of the machine that is running DotNetNuke. This value is defaulted to the name of the current web server and may need to be changed when operating in a web farm.
5. In the **Account Email** text box, enter the email address used when purchasing the license.
6. In the **Invoice Number** text box, enter the invoice number given to you when you purchased your license.
7. Click the **Automatic Activation** button.



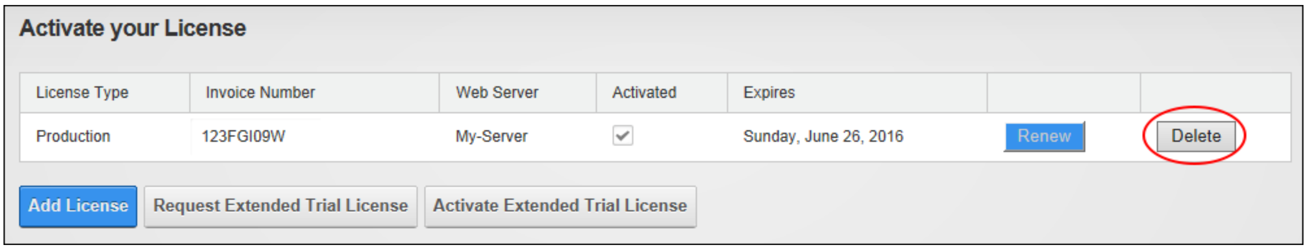
A status message is now displayed. If unsuccessful, review the message and try again.



Deleting a License

How to delete a non-active or expired license using the License Manager.

1. Navigate to Host > Advanced Settings > **Activate your License**. Details of any previously activated licenses are displayed.
2. Click the **Delete** button beside the license to be deleted. This displays the message, "Are you sure you want to delete this license?"

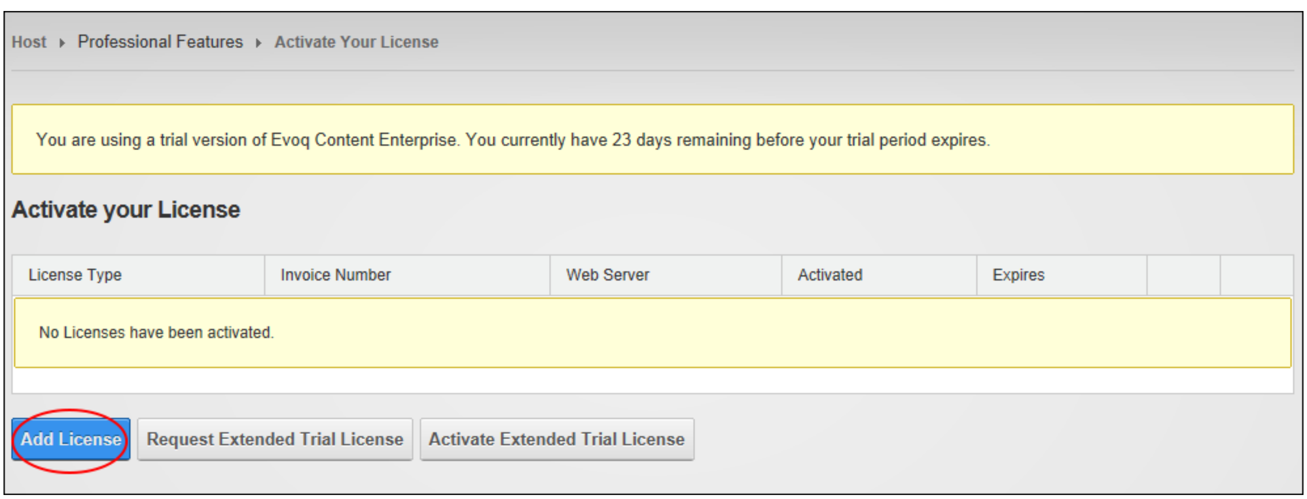


3. Click the **OK** button to confirm.

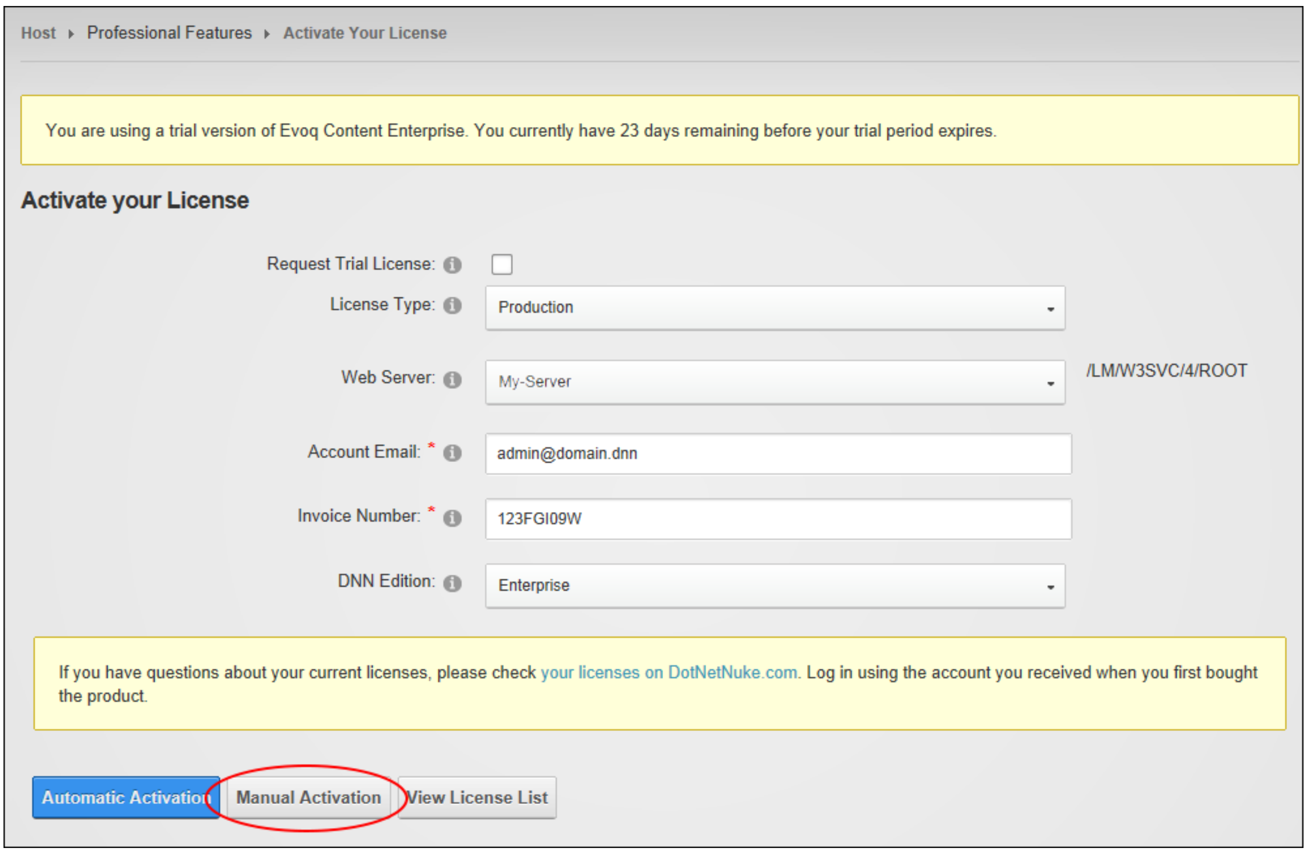
Manually activate your DNN Licenses

How to activate your Evoq Content and Evoq Content Enterprise license using manual activation.

1. Navigate to Host > Advanced Settings > **Activate your License**. Details of any previously activated licenses are displayed.
2. Click the **Add License** button.

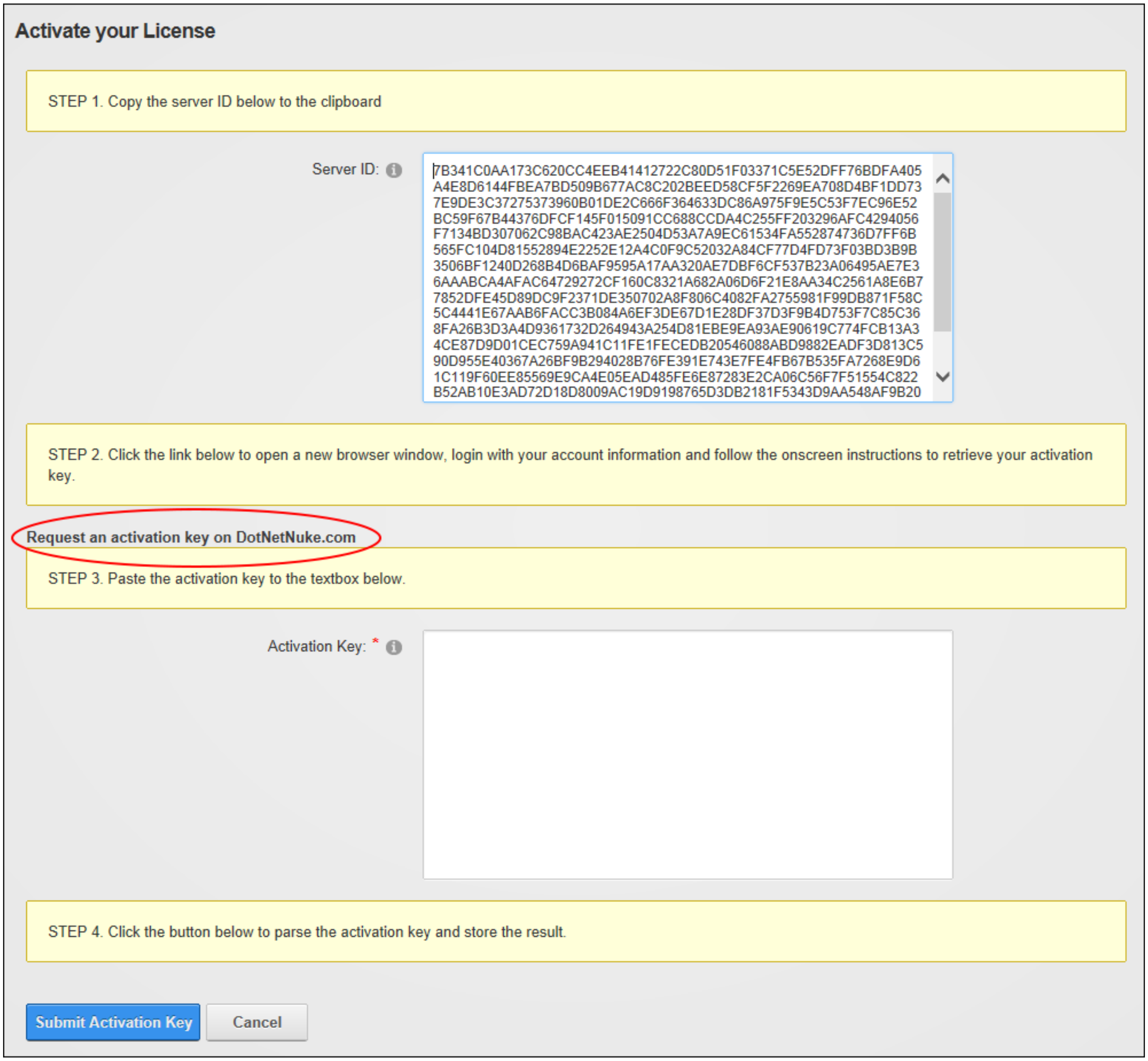


3. At **License Type** select from these options:
    - **Development**: Select if this is a development site.
    - **Production**: Select if this is a production (live) site.
4. At **Web Server**, select the name of the machine that is running DotNetNuke. This value is defaulted to the name of the current web server and may need to be changed when operating in a web farm.
5. In the **Account Email** text box, enter the email address used when purchasing the license.
6. In the **Invoice Number** text box, enter the invoice number given to you when you purchased your license.
7. Click the **Manual Activation** button.

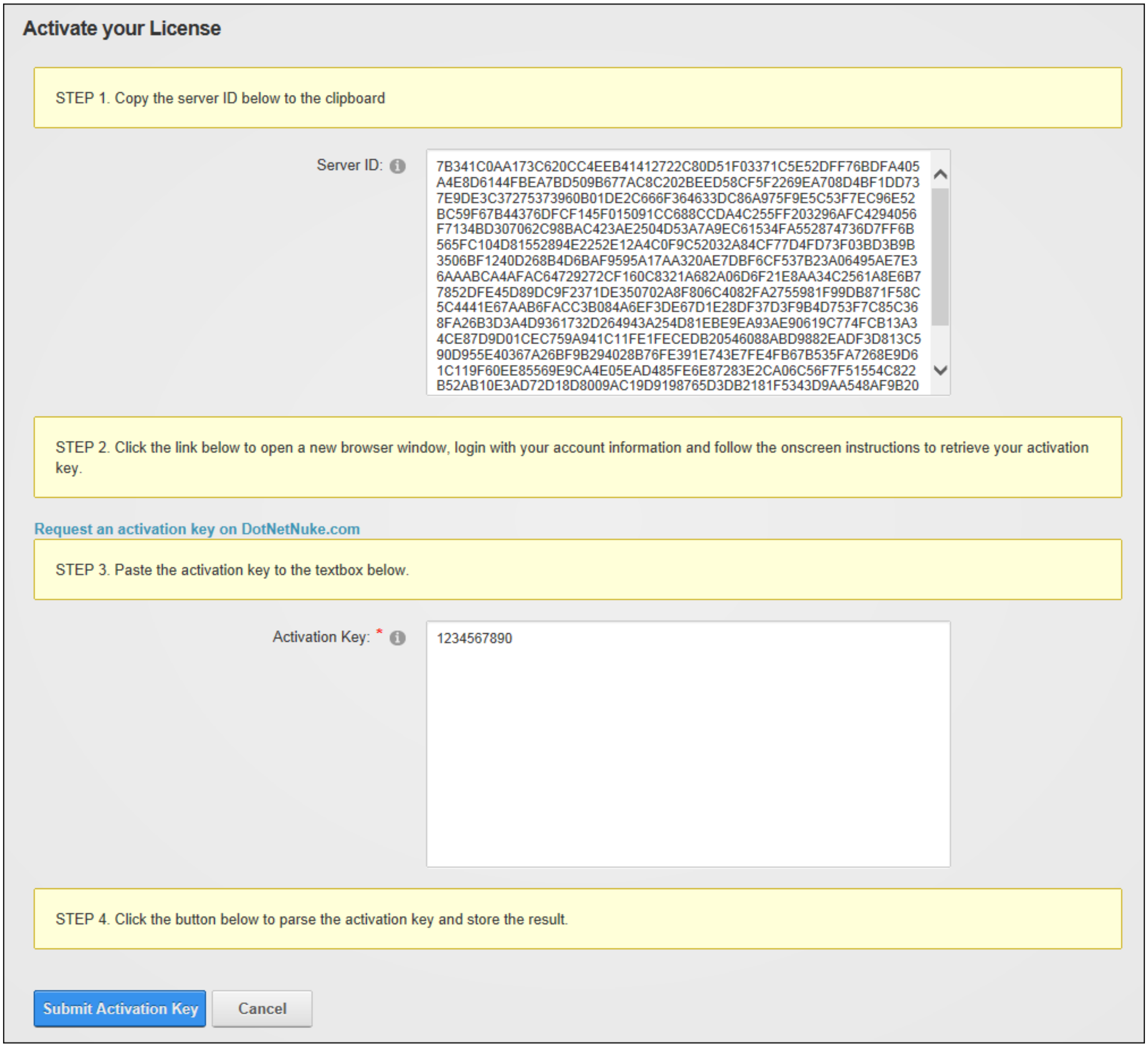


8. At **STEP 1 - Server ID**, copy the server ID information to your clipboard.
9. Click the [Request an activation key on dnnsoftware.com]() link. This opens the Request License page of the dnnsoftware.com web site in a new browser window.

10. On the dnnsoftware.com web site.
    1. Login to the DotNetNuke web site using your account information. **Important.** It is best to use the standard login method when logging in to the dnnsoftware.com web site. If you use the Live ID method, you will not be taken to the correct page.
    2. At **STEP 1. Please enter the key generated by the licensing wizard in the textbox below**, paste the information copied at Step 8 into the text box.
    3. Click the **Generate Activation Key** button. This displays the activation key in the STEP 3 text box.
    4. Copy the key from the STEP 3 text box.



11. Return to your DotNetNuke site.
12. In the **Activation Key** text box, paste the key which you just copied from the dnnsoftware.com web site.

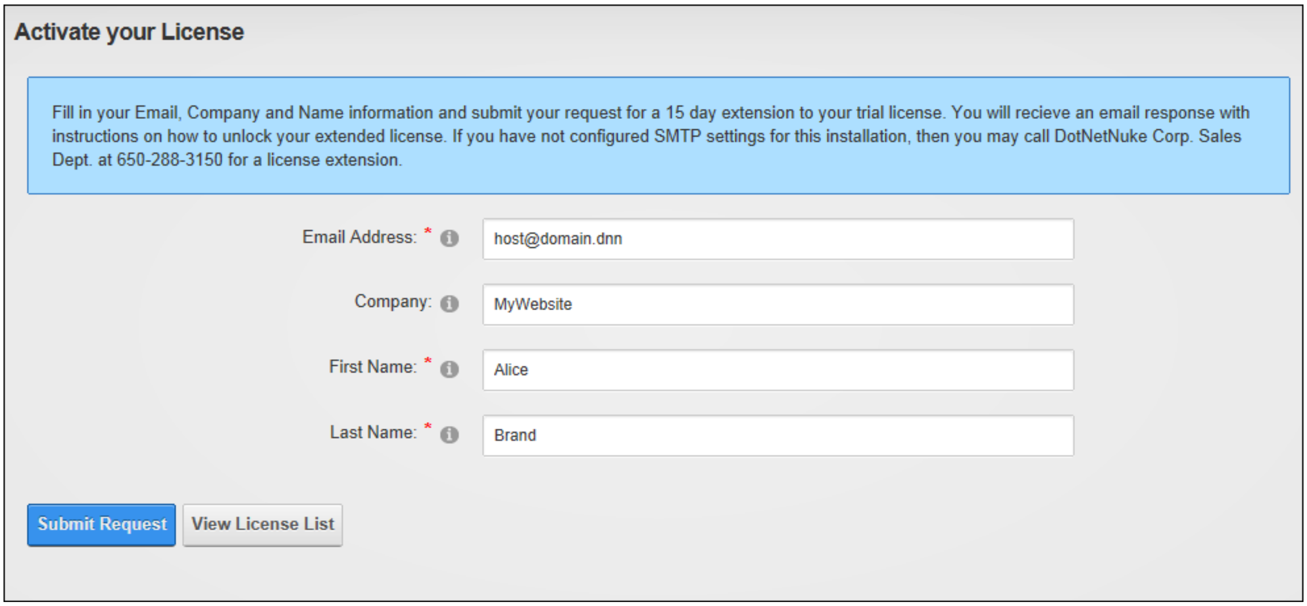


13. Click the **Submit Activation Key** button.

Requesting an Extended Trial License

How to request a 15 day extension to your trial license for Evoq Content and Evoq Content Enterprise. Once the request has been submitted, you should receive an email within 1 business day, with instructions for extending your license.

1. Navigate to Host > Advanced Settings > **Activate your License**.
2. Click the **Request Extended Trial License** button.
3. In the **Email Address** text box, enter the email address where the extended trial information should be sent to.
4. In the **Company** text box, enter your company name.
5. In the **First Name** text box, enter your first name.
6. In the **Last Name** text box, enter your last name.



7. Click the **Submit Request** button. A status message is now displayed. If unsuccessful, review the message and try again.

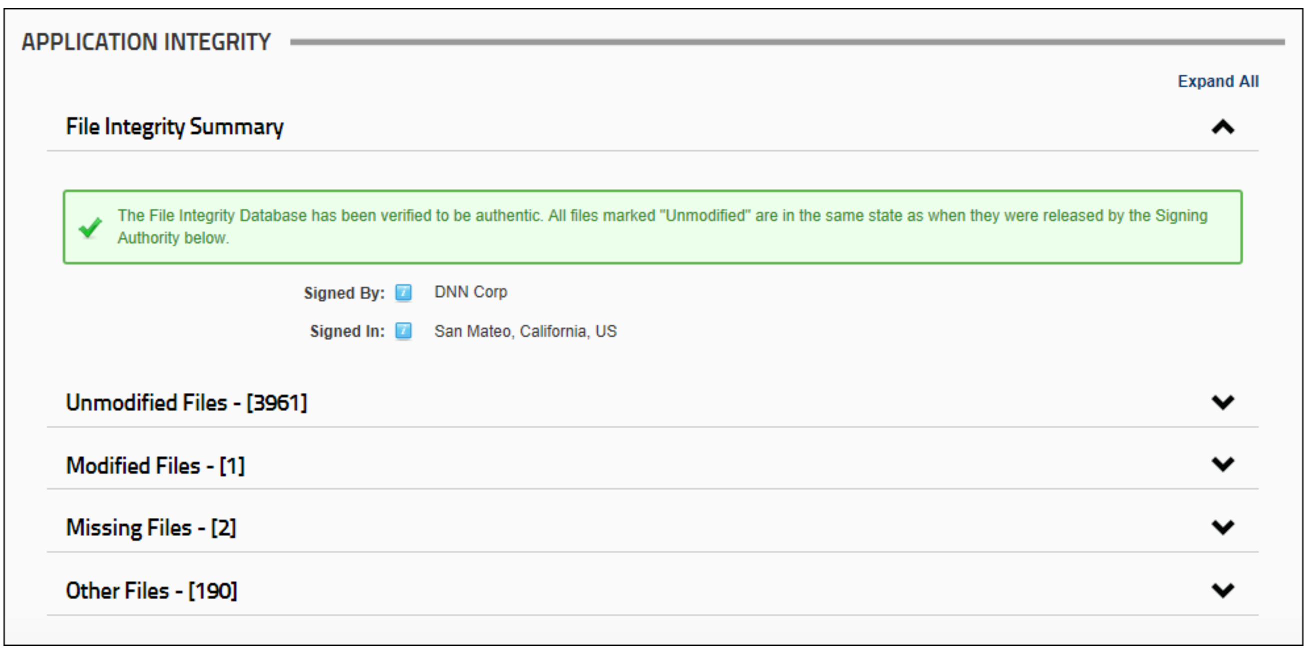
Application Integrity

About Application Integrity

The Application Integrity page displays the File Integrity Checker module (titled "Application Integrity") that provides a summary of the files on your site. This feature can detect files that have been modified since the install, files that are missing and files that are not included in the list of allowable file types. By keeping an eye on these categories you can ensure you do not have any malicious files that could cause problems on your site.

This module is located on the Host > Advanced Settings > Application Integrity page and can be added to any site page.

- **File Integrity Summary**: Using the signature file included in the install, this section allows you to see which files have been modified or are missing. The file integrity summary will tell you if this signature file has been modified or not. If the File Integrity Database has not been tampered with then all of the files in the unmodified section are in the same state as they were when the site was installed.
- **Unmodified Files**: The files that are listed in this section have not been modified since installing Evoq Content or Evoq Content Enterprise.
- **Modified Files**: The list of files in this section is files that have been modified since installing Evoq Content or Evoq Content Enterprise. Files in this section are not necessarily malicious, they could just be there because of customization changes you have made.
- **Missing Files**: The missing files section refers to files that are included in the default installation of Evoq Content or Evoq Content Enterprise but are not in the section currently. Missing files could cause certain DNN features to work incorrectly, or not work at all.
- **Other Files**: The list of other files includes all of the files on your site with a file extension that is not in the list of allowable extensions. Third party or custom modules may be included in this list but that does not mean they are malicious. Files in this list could contain executable code, and could be a potential security threat to your site. It is important to monitor the files in this list for files that could be a threat to your site.

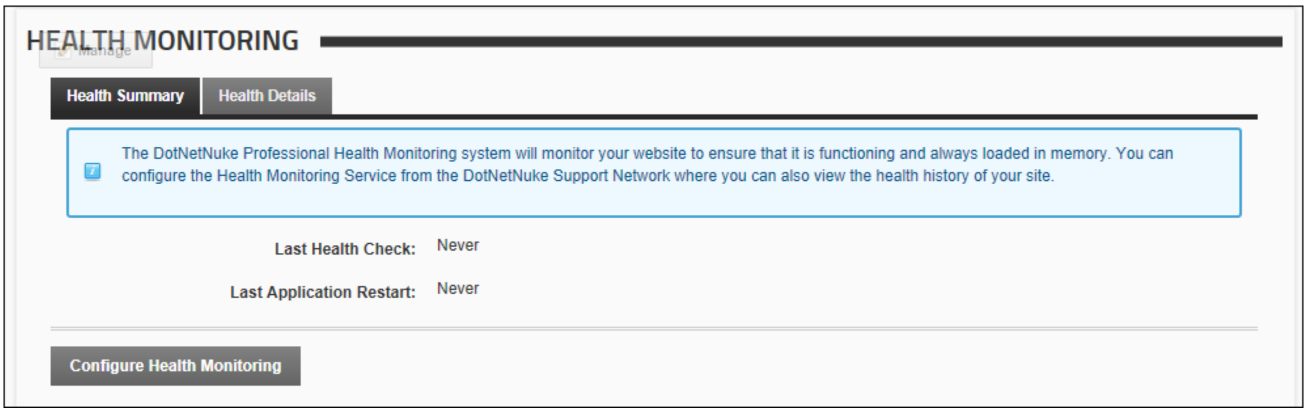


The File Integrity Checker Module on the Host > Application Integrity page

About Health Monitoring

Once your site has been configured through the DNN support network the "health" of your site is monitored using the DNN servers. The Health Monitoring service "pings" your site regularly to ensure it is online and sends you notification when the site goes offline. A benefit of Health Monitoring is the regular pinging provides sites that don't receive a high amount of traffic with a "Keep live" service that prevent the IIS from unloading your site from memory. Keeping your site in IIS's memory avoids long loading times for your site visitors.

The Health Monitoring (Host > **Health Monitoring**) can be added to any site page once it has been deployed to a site.

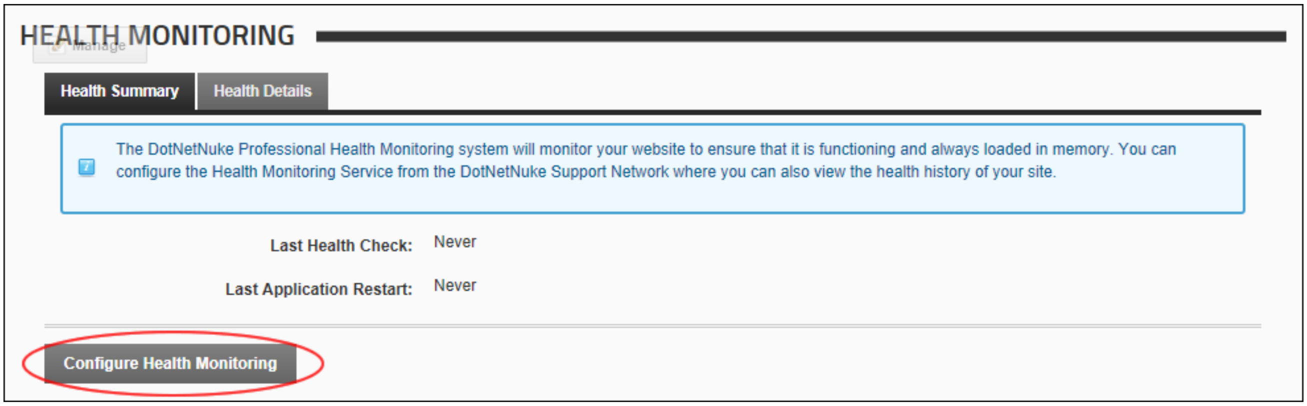


Health Monitoring

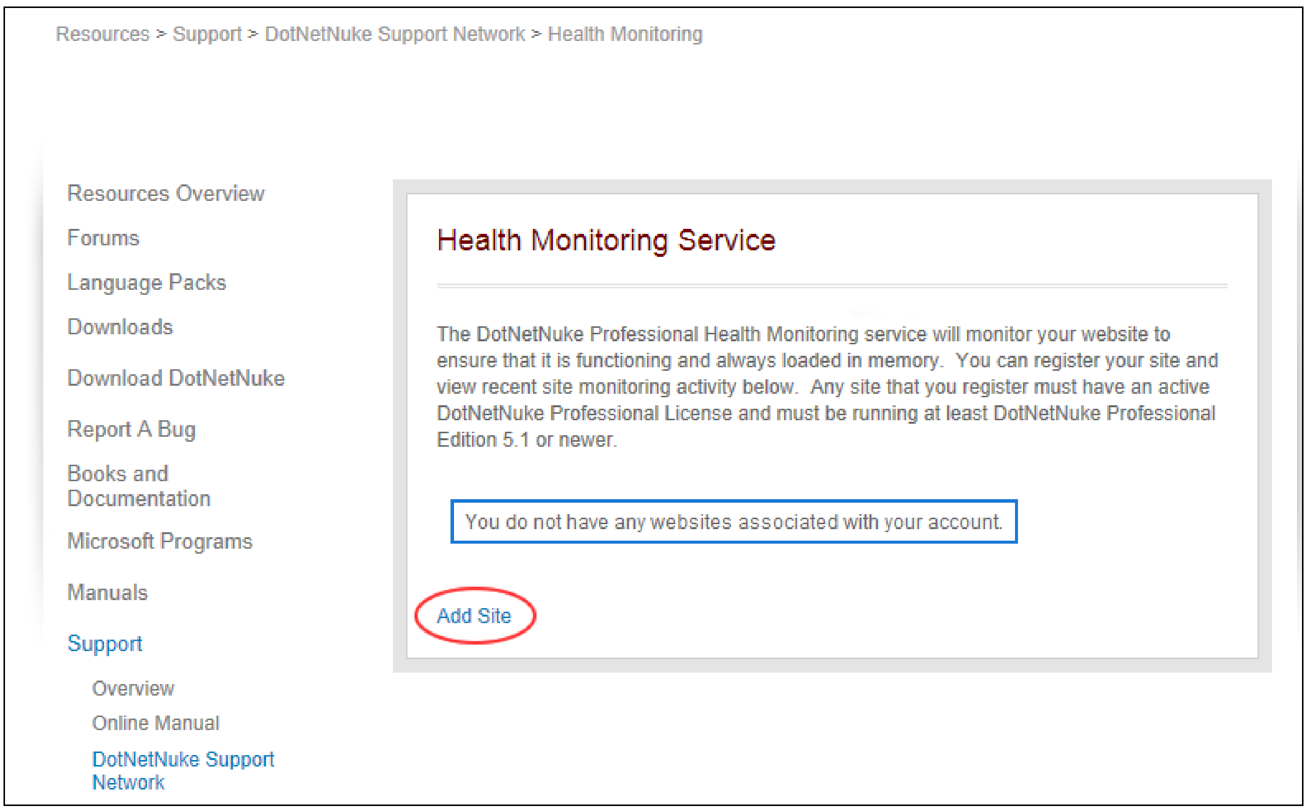
Configuring Health Monitoring

How to configure the Health Monitoring Service for your site.

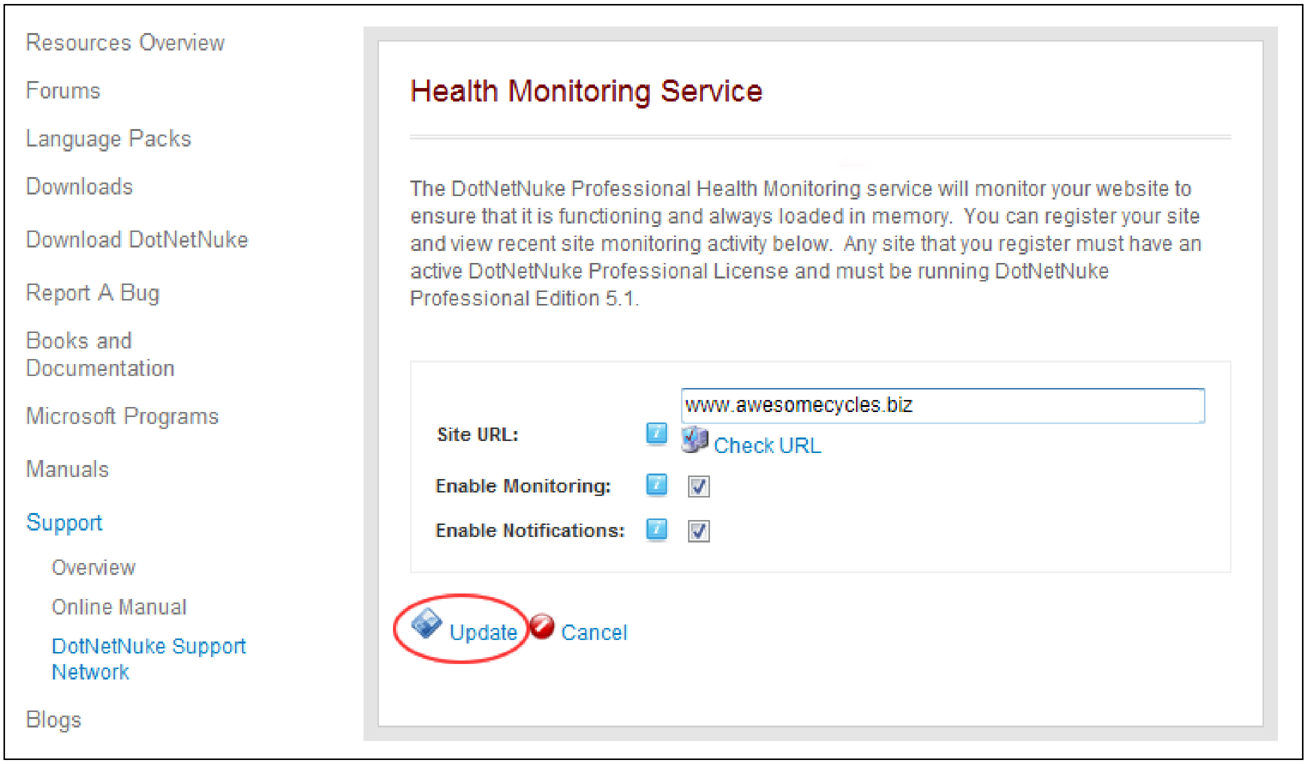
1. Log in to the dnnsoftware.com web site using the account details provided to you when you purchased your copy of Evoq Content or Evoq Content Enterprise.
2. Open your site in a new Web browser.
3. Navigate to Host > **Health Monitoring** - OR - Go to a Health Monitoring module.
4. Click the **Configure Health Monitoring** button.



5. You are now on the Health Monitoring page of the DNN Support Network and any sites associated with this account are listed in the Health Monitoring Service section.
6. Click the Add Site link.



7. In the **Site URL** text box, enter the URL for your site.
8. Click the Check URL link to check the domain name entered in the previous step and if the URL is running Evoq Content or Evoq Content Enterprise.
9. **Optional.** At **Enable Monitoring**, mark the check box to enable health monitoring on your site.
10. **Optional.** At **Enable Notifications**, mark the check box to receive email notifications to the email address provided when purchased your Evoq Content or Evoq Content Enterprise license.
11. Click the Update link to save these settings.



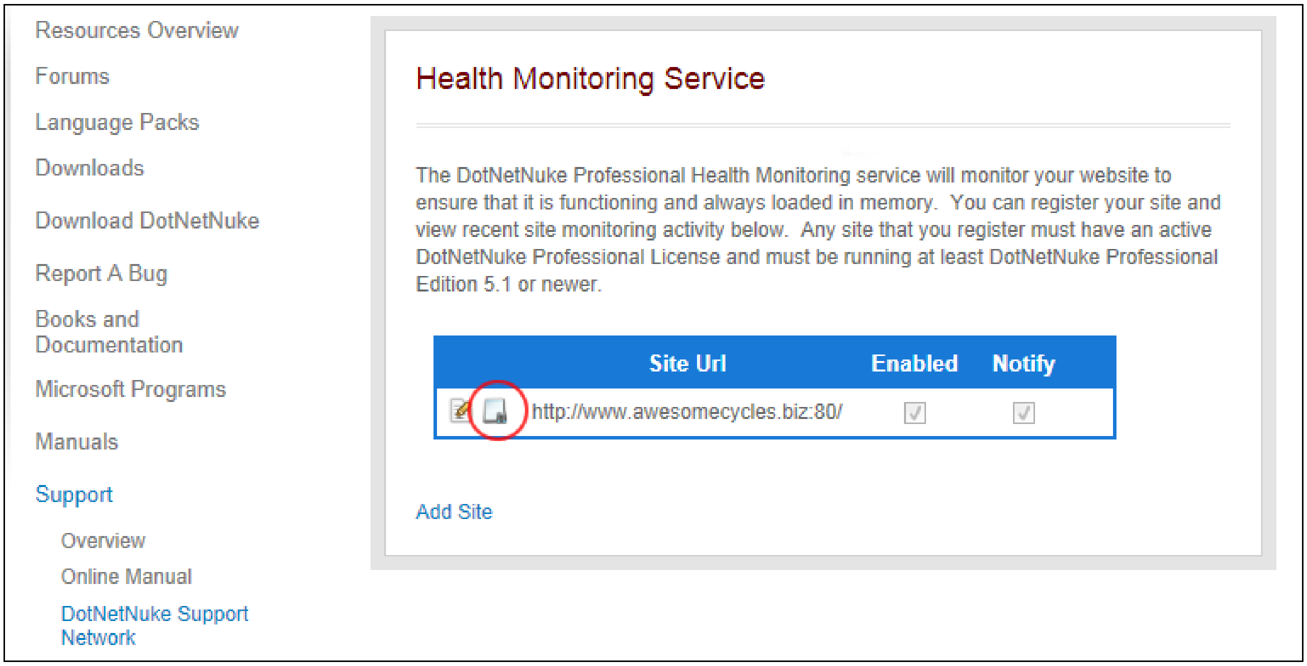
Viewing Health Logs on DNN Support Network

How to view the health details report of a site. The DNN Health Monitoring service pings the server of the site you choose and displays then information in a report.

Prerequisite. The Health Monitoring must be configured for the site. See "Configuring Health Monitoring"

Option One

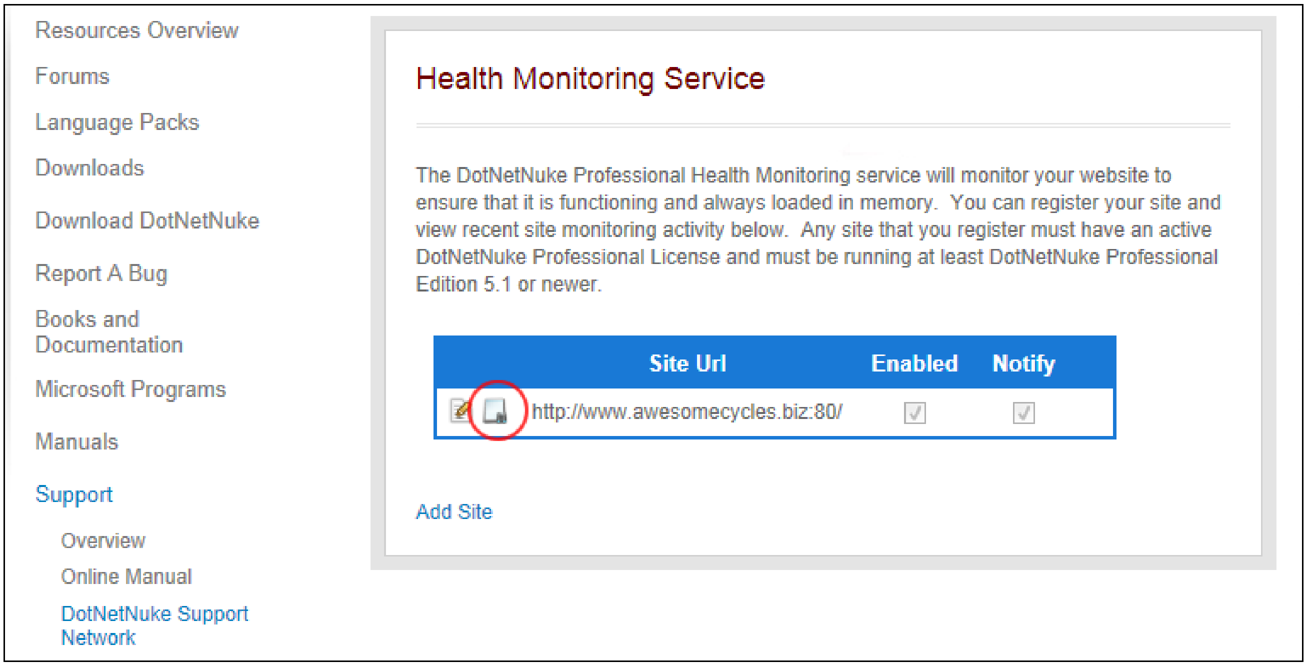
1. Go to the Health Monitoring page of the DNN Support Network.
2. Log in to your account.
3. In the Site URL list, click the **View The Current Health Logs For This Site** button beside a site.



Option Two

Prerequisite. You must be logged in to the DNN Support Network.

1. Navigate to Host > **Health Monitoring** - OR - Go to a Health Monitoring module.
2. Select the **Health Details** tab.
3. Click the View Health Logs on DotNetNuke Support Network link to open the Health Monitoring page of the DNN Support Network.
4. Click the **View The Current Health Logs For This Site** button beside a Site URL.



The Health Details Report

The Health Details Report contains the following information for each ping to the site's server.

- **Date Checked**: The date and time of the ping
- **Response Time**: The time it took the server to respond to the ping
- **Status**: If the ping was **Successful** or **Unsuccessful**
- **Comments**: Any comments

Date Checked	Response Time	Status	Comment
7/15/2009 6:37:14 PM	3265.5832ms	Success	
7/15/2009 6:27:06 PM	3265.625ms	Success	
7/15/2009 6:16:59 PM	3203.535ms	Success	
7/15/2009 6:05:37 PM	3624.9536ms	Success	
7/15/2009 5:56:43 PM	3328.0824ms	Success	
7/15/2009 5:46:36 PM	3421.8312ms	Success	
7/15/2009 5:36:28 PM	4046.8232ms	Success	
7/15/2009 5:26:19 PM	3249.9584ms	Success	
7/15/2009 5:16:13 PM	3468.7056ms	Success	
7/15/2009 5:06:02 PM	3578.0792ms	Success	
7/15/2009 4:55:52 PM	3453.0808ms	Success	
7/15/2009 4:45:45 PM	3406.2064ms	Success	
7/15/2009 4:35:36 PM	3109.3352ms	Success	
7/15/2009 4:25:26 PM	3234.3336ms	Success	
7/15/2009 4:15:19 PM	3078.1053ms	Success	
7/15/2009 4:05:10 PM	3140.7657ms	Success	
7/15/2009 3:55:02 PM	3687.4528ms	Success	
7/15/2009 3:44:54 PM	3109.3352ms	Success	
7/15/2009 3:34:46 PM	3421.8312ms	Success	
7/15/2009 3:24:37 PM	2968.712ms	Success	

Page 1 of 3 First Previous [1] 2 3 Next Last

Return to Site List

Viewing the Health Logs

Software and Documentation

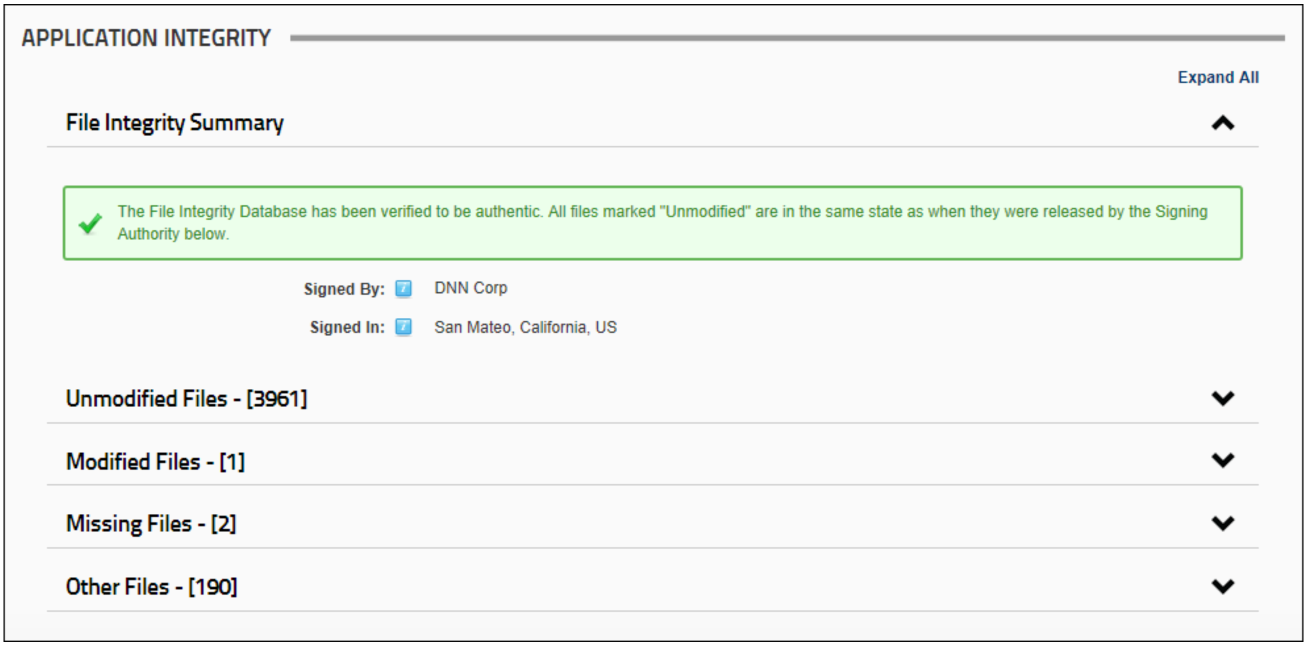
Here customers can access a range of additional modules, site management tools and access to the DNN Support Network. Login is required.

Application Integrity

The Application Integrity page displays the File Integrity Checker module (titled "Application Integrity") that provides a summary of the files on your site. This feature can detect files that have been modified since the install, files that are missing and files that are not included in the list of allowable file types. By keeping an eye on these categories you can ensure you do not have any malicious files that could cause problems on your site.

This module is located on the Host > Advanced Settings > Application Integrity page and can be added to any site page.

- **File Integrity Summary**: Using the signature file included in the install, this section allows you to see which files have been modified or are missing. The file integrity summary will tell you if this signature file has been modified or not. If the File Integrity Database has not been tampered with then all of the files in the unmodified section are in the same state as they were when the site was installed.
- **Unmodified Files**: The files that are listed in this section have not been modified since installing Evoq Content or Evoq Content Enterprise.
- **Modified Files**: The list of files in this section is files that have been modified since installing Evoq Content or Evoq Content Enterprise. Files in this section are not necessarily malicious; they could just be there because of customization changes you have made.
- **Missing Files**: The missing files section refers to files that are included in the default installation of Evoq Content or Evoq Content Enterprise but are not in the section currently. Missing files could cause certain DNN features to work incorrectly, or not work at all.
- **Other Files**: The list of other files includes all of the files on your site with a file extension that is not in the list of allowable extensions. Third party or custom modules may be included in this list but that does not mean they are malicious. Files in this list could contain executable code, and could be a potential security threat to your site. It is important to monitor the files in this list for files that could be a threat to your site.



The File Integrity Checker Module on the Host > Application Integrity page

About the Security Center

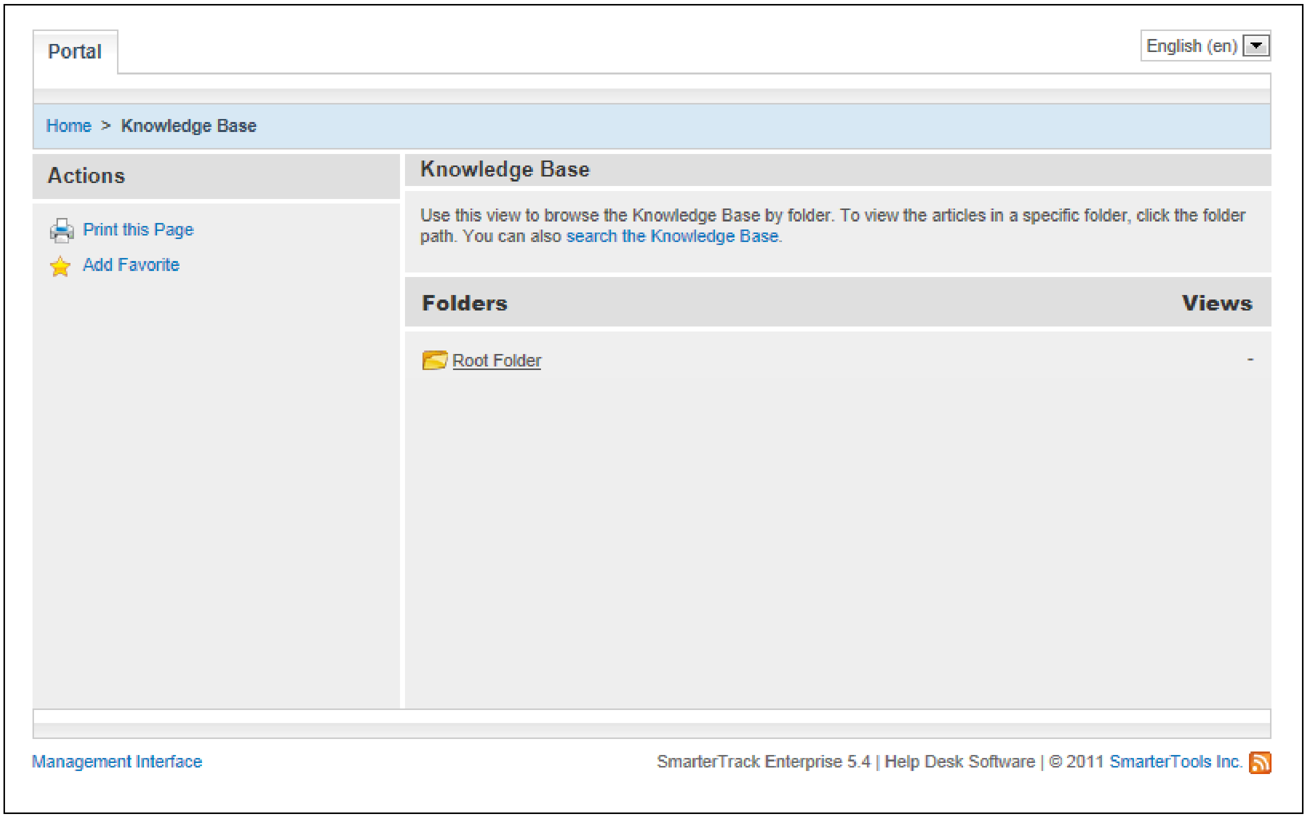
The Security Center (Host > Advanced Settings > Security Center) dynamically loads a list of any known security vulnerabilities affecting the version of DNN application you are running. It also provides you with navigational guidance to acquire the latest upgrade.

Only available in Evoq Content and Evoq Content Enterprise

The Security Center Module

Knowledge Base

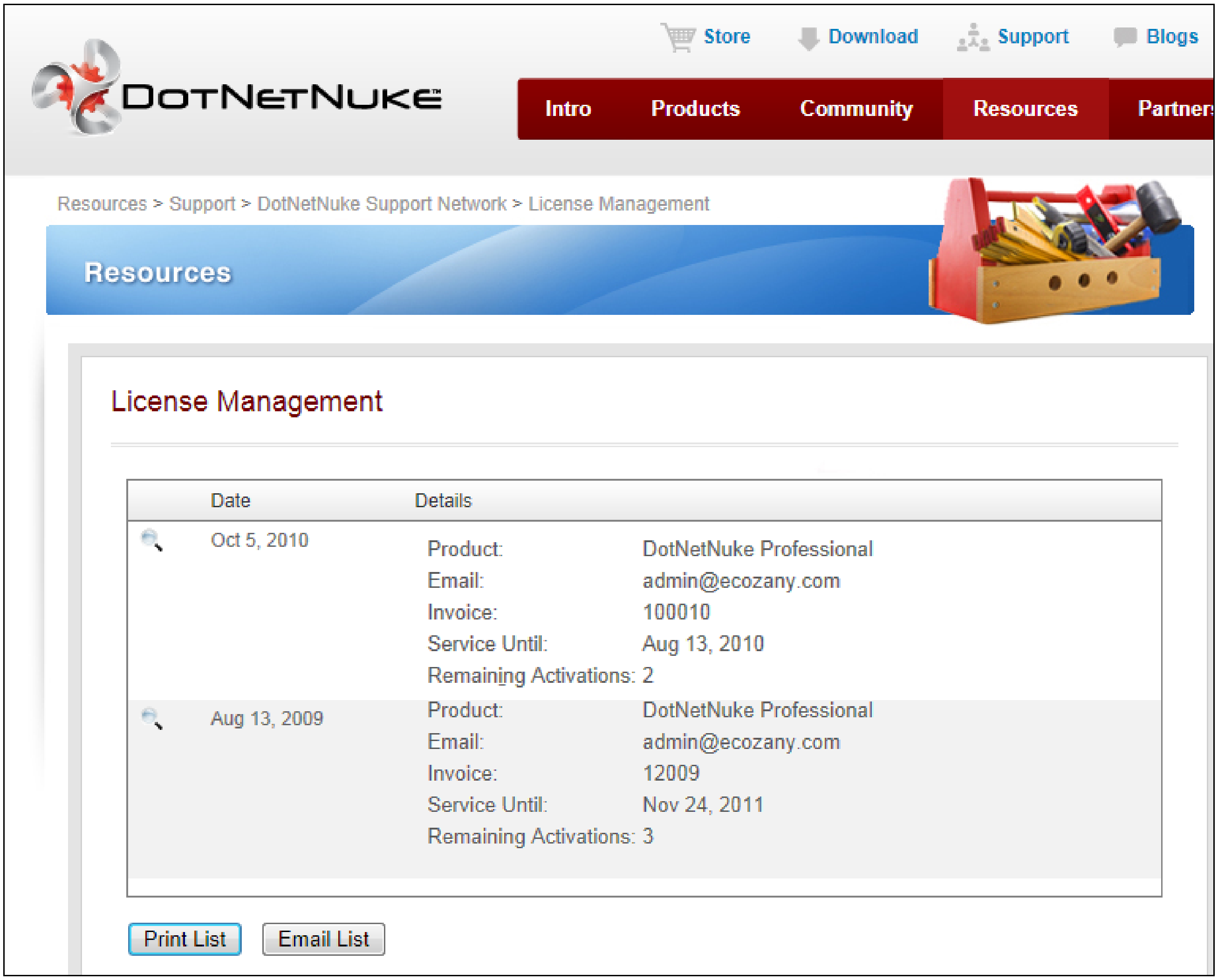
Links to the Knowledge Base section of the DotNetNuke Support Network. Here you will find guidance for DotNetNuke administrative tasks and answers to common technical questions. Note: Login required.



DotNetNuke Support Network Knowledge Base

License Management

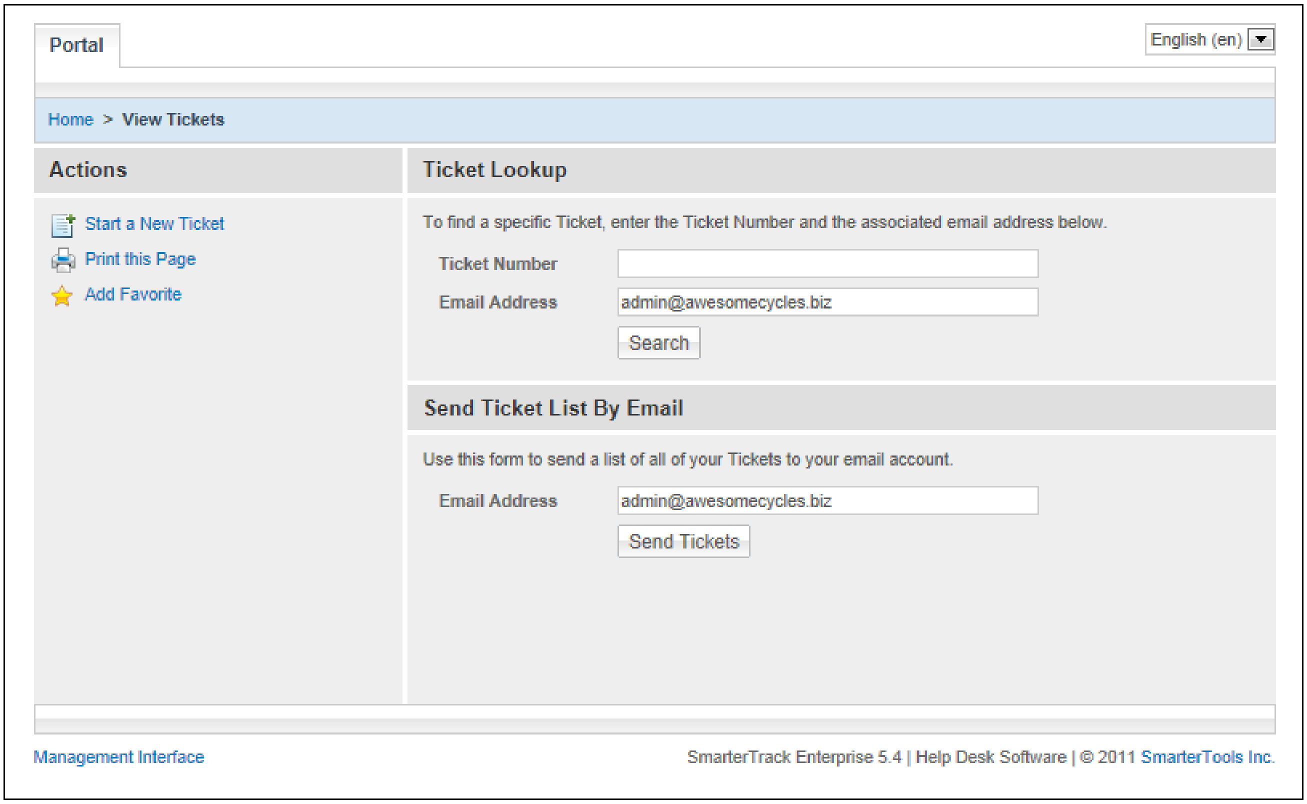
Links to the License Management section of the DotNetNuke Support Network where customers can manage licenses for subscribed products. Note: Login required.



The DNN Support Network License Management page

My Support Tickets

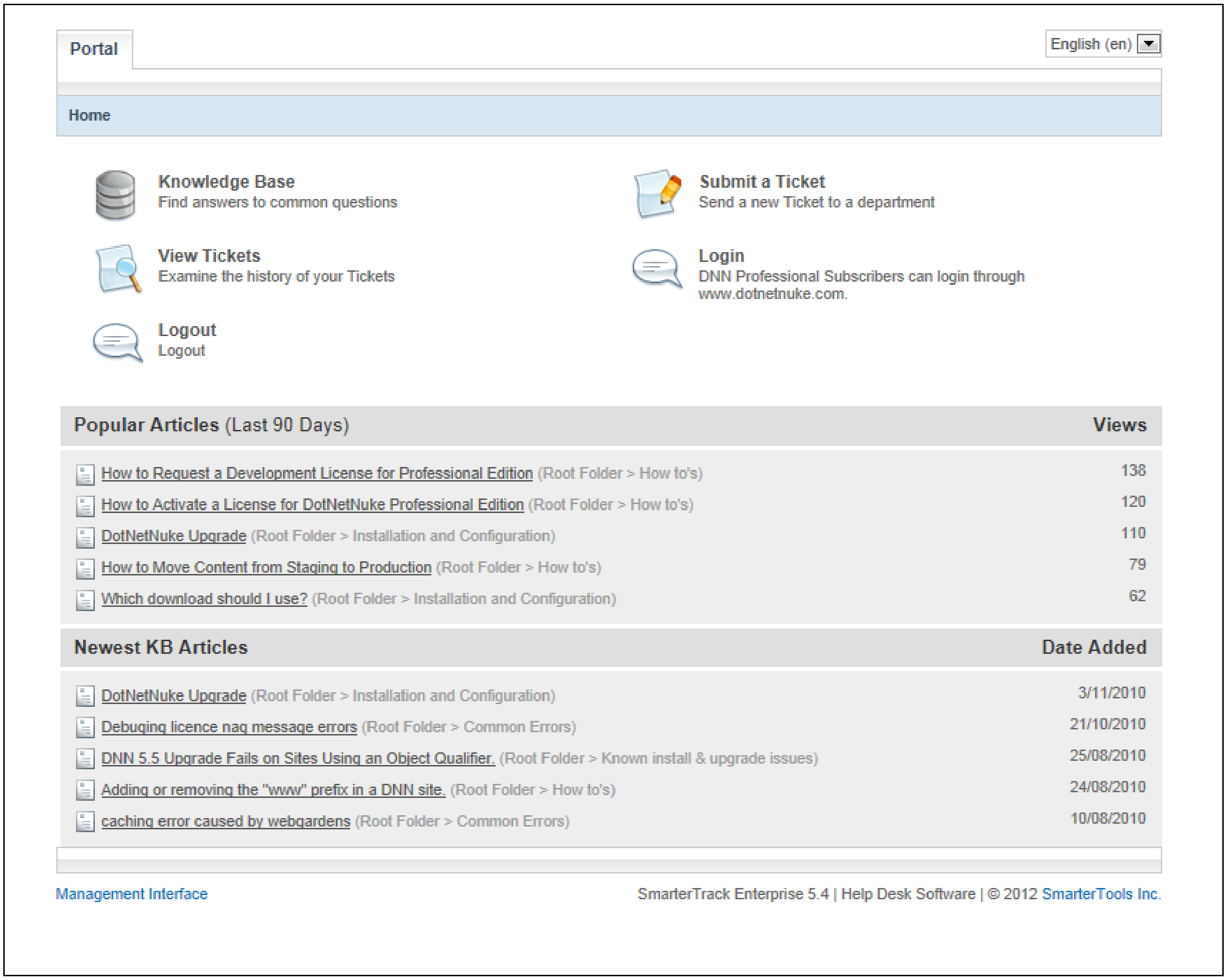
Links to the View Tickets section of the DotNetNuke Support Network where customers create new support requests (Start A New Ticket) and track existing tickets. DNN staff will promptly reply to your request and progress will be tracked using the ticket. Note: Login is required. *Only available in Evoq Content and Evoq Content Enterprise*



The DotNetNuke Support Network View Tickets page

Technical Support

The Host > **Technical Support** link opens the Technical Support section of the DotNetNuke Support Network. Here you can find the latest support news, knowledge base articles and more. Note: Login required. *Only available in Evoq Content and Evoq Content Enterprise*



The Technical Support page of the DotNetNuke Support Network

About DNN Corp

DNN Corp. is the steward of the DNN open source project, the most widely adopted Web Content management Platform for building websites and web applications on Microsoft .NET. Organizations use DNN to quickly develop and deploy interactive and dynamic websites, intranets, extranets and web applications.

The DNN platform is available in a free DNN Platform and the subscription-based Evoq Content and Evoq Content Enterprise with an Elite Support option. DNN Corp. also operates the DNN Store (http://store.dnnsoftware.com/) where users purchase third party software apps for the platform. Founded in 2006 and funded by Sierra Ventures, August Capital and Pelion Venture Partners, DNN Corp. is headquartered in San Mateo, Calif.

Index

Table of Contents **2**

About this Manual **3**

About Evoq Content **4**

Web Content Management **5**

Document Viewer 5

About the Document Viewer 5

Document Library Migration 6

Use Cases 6

Navigating to and Selecting Folders 8

Navigating to Files 8

Setting Sort Order of Files 9

Downloading a File 9

Getting a File URL 10

Settings 11

Configuring the Document Viewer Settings 11

File Management 14

About Digital Asset Management 14

Getting Familiar with Digital Asset Management 15

Configuring Search Criteria and Directories 17

All Users 18
Downloading one or more Files 18
Getting a File URL 20
Navigating to and Selecting Folders 21
Navigating to Files 21
Refreshing All Files within a Folder 22
Searching for Files 23
Advanced Search 24
Setting Sort Order of Files 24
Subscribing/Unsubscribing to Files and Folders 25
Viewing File Properties 26
Viewing Folder Properties 29
Folder Editor 31
Adding a SubFolder 31
Overview of Folder Types 34
Copying Files 35
Editing a Document 37
Deleting one or more Files and/or Folders 38
Managing File Properties 40
Performing Group Updates 42
Managing File Tags 44
Viewing Tags 44

Adding Tags 44
Managing Folder Properties 45
Modifying Folder Permissions 48
Moving Files and/or Folders 49
Renaming a File 52
Uploading Files 54
Folder Security Settings 57
About Folder Security Settings 57
Adding an Amazon S3 Folder Type 58
Adding a UNC Folder Type 60
Adding a Windows Azure Folder Type 61
Versioning 64
About Versioning 64
Managing File Versions 64
Setting Number of Versions 65
Workflow 65
About Workflow 65
Configuring Workflow 67
Publishing or Discarding a Draft File 71
Approving or Rejecting a File 73
Administrators 78
Synchronizing Folders 78

Installing and Configuring WebDav 79
About WebDAV 79
Installing and Enabling WebDAV 79
Server Components 80
DNN Components 80
DNN OpenFromServer component 81
IIS Components 82
Enabling WebDAV 82
Adding the WebDAV Feature 82
Enabling WebDAV 83
Adding an authoring rule 84
Setting Authentication Providers 85
Adding the IISRESET Feature 86
Client Components 86
Office SharePoint support 86
Clearing temporary data from your Browser 88
WebDAV Settings Checklist 88
HTML Pro 89
About the HTML Pro Module 89
Configuring and Using Workflow 90
Module Editors 92
Adding and Editing Content 92

Adding and Editing Content Inline 93

Adding Replacement Tokens 94

Approving Content 96

Approving without editing 96

Editing and approving 97

Rejecting Content 99

Comparing and Managing Versions 101

Locking/Unlocking Module Content 104

Managing AutoSaved Content 105

Managing My Workflow Tasks 106

Previewing Editor Content 107

Publishing a Draft 108

Rolling Back Content 109

Administrators 110

Activating/Deactivating a Workflow 110

Adding a Workflow State 112

Adding a Workflow 116

Configuring Admin Workflow Settings 118

Deleting a Content Version 120

Deleting a Workflow State 121

Editing a Workflow State 122

Setting Maximum Version History 124

Settings 125
Displaying/Hiding Summary 125
Enabling/Disabling AutoSave 127
Enabling/Disabling Token Replacement 129
Setting a Workflow 130
Enabling or Disabling Form Decoration 132
Commerce 133
About Commerce 133
Commerce FAQ's 134
Configuring the Commerce Module 139
Configuring Commerce Module Options 143
General Settings 143
Payment Options 144
Tax Rates 146
Order Status Options 146
Commerce Customers 147
Commerce Dashboard 148
Commerce Discounts 149
Commerce Orders 152
Commerce Products 156
Creating a PayPal Test Account 162
Purchasing a Product 167

Product Display 167
Shopping Cart 168
Billing and Shipping 168
Review and Payment 170
Order Completion 172
Cross Site Module Sharing 173
Creating Site Groups 173
About Site Groups 173
Adding a Site Group 174
Deleting a Site Group 176
Editing a Site Group 177
Troubleshooting: No Site Listed in Available Sites List 178
Sharing a Module 179
Adding an Existing Module 179
Option One - Drag and Drop Module 179
Option Two - Insert Module 182
My Modules 184
About My Modules 184
Managing My Modules 185
Filtering the Modules List 185
Sorting the Modules List 186
Navigating to a page or module 187

Managing Multiple Modules 187

Page Management 188

Setting the Error Pages 188

URL Settings for Pages 191

Search Results 193

Performing an Advanced Search 193

User Account Management 197

About the User Switcher 197

Impersonating a User 197

Site Management 202

About the Site Management Page 202

Site Aliases 203

Configuring Site Alias Settings 203

Adding a Site Alias 204

Editing a Site Alias 206

Deleting a Site Alias 207

Performance and Scalability 208

Advanced URL Management 208

All Sites 208

About Advanced URL Management 208

Managing General URL Settings for all Sites 209

Managing URL Settings for all Sites 212

Managing URL Regular Expressions for all Sites 214
Current Site 217
About Advanced URL Management 217
Managing General URL Settings for this Site 218
Managing URL Settings for this Site 220
Managing URL Regular Expressions for this Site 223
Testing a Page URL 225
Testing URL Rewriting 226
Google Analytics Pro 227
About Google Analytics Pro 227
What Is Google Analytics and why should I consider using it 228
How do I get an account? 228
Adding a Segmentation Rule 228
Configuring Google Analytics Pro 231
Deleting a Segmentation Rule 233
Editing a Segmentation Rule 233
Manage Web Servers 234
About the Web Server Manager 234
Managing Cache Items 235
Managing Your Web Server 237
Setting the Default Caching Provider 239
Setting the SSL Offload Header Value 240

Viewing Memory Usage Information 242
Search Admin 243
Advanced Crawlers 243
Directories 243
Adding Directories to the Index 243
Deleting Directories from the Index 246
Duplicates 247
Adding a Duplicate Pattern 247
Deleting a Duplicate Pattern 251
Editing a Duplicate Pattern 252
Included File Extensions 253
Adding File Extensions to Searches 253
Deleting File Extensions from Searches 256
URL Paths 257
Adding URL's for Indexing 257
Deleting URL's from Indexing 261
Editing Indexed URL's 262
Security 266
About Security 266
Module Permissions 266
About Module Permissions 266
Setting Module Permissions 267

Setting Permissions for Shared Modules 271

Page Permissions 273

About Page Permissions 273

Setting Page Permissions (Evoq Content) 275

Mobile Devices Support 279

About Mobile Devices Support 279

About the Mobile Skin 279

Creating a MicroSite 284

Creating a Standalone Mobile Site 285

Summary View and Full View 288

Support and Documentation 290

Activate Your License 290

Activating an Extended Trial License 290

Automatically activate your DNN Licenses 291

Deleting a License 293

Manually activate your DNN Licenses 293

Requesting an Extended Trial License 297

Application Integrity 298

About Application Integrity 298

Health Monitoring 300

About Health Monitoring 300

Configuring Health Monitoring 300

Viewing Health Logs on DNN Support Network 302
Option One 303
Option Two 303
The Health Details Report 304
Software and Documentation 305
Application Integrity 305
About the Security Center 307
Knowledge Base 308
License Management 308
My Support Tickets 309
Technical Support 310
About DNN Corp 312
Index 313