Web Manager

Administrator Guide

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INTRODUCTION

What is Web Manager?

Your Web site has been built with a tool developed by Port 80 Solutions Ltd. called Web Manager. Web Manager is a Content Management System (CMS), which gives you will have full control over the content and navigation of your Web site. To effectively and efficiently manage your site you should become completely familiar with all of the tools before trying to add or edit content. Unlike other Web page creation applications you may have used in the past, the CMS makes changes to your Web site immediately. So be very careful when working in the Web Manager Administration area.

Logging In

To access the Administration tools for your Web site go to http://cms.nortia.org/admin. Using the **User Name** and **Password** supplied by your Port 80 Representative, login to the Administrator area.

Reminder: Any change you make in the administration area will be automatically transferred to your live Web site. So be 100% sure of any changes you are making!

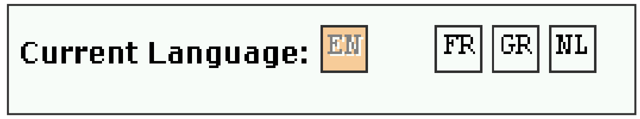
Main Features

Once your password has been accepted, you will be taken the Web Manager Admin console. The left side of the screen contains the Menu, which consists of the tools you will use to administer your Web site. The Menu will always be on the left of the screen. This guide is written to explore each of the Menu Items.

Note: You may not have all of the Menu Items described in this Administration Guide. If you would like to add them to your Web site please contact your Nortia Representative.

LANGUAGE SETTINGS

Language Settings are shown above the Menu. Not every site will have multiple language content. If you do have additional languages, locate 'Current Language' at the top left of the Menu.



To edit the English portion of your Web site, you have to ensure that the 'EN' is selected. To make changes to another portion of your site, simply click on the desired language symbol. The selected language will be highlighted. The unselected language(s) will be colourless and will be shifted slightly to the right. In the illustration above, English is selected.

Note: if you preview your Web site while you are making edits and switch between languages, the Administration Console will also switch to the language you last previewed. Unfortunately, this change cannot always be displayed in the Current Language settings. So if you would like to view the changes you make either open your Web site in another browser, or be sure to select the desired language before editing any other area of your Web site.

ADMINISTRATION

Profile

The Administration Profile area will allow you to change your contact and login information.

Click on the 'Administration' Menu Item, and then select Profile. Enter the appropriate information in the fields; ensuring that the 'Password' field and the 'Confirm' field are the same. Click the 'Save' button to update the profile information.

Some sites have the Security Zones feature. If your site has this feature you will be able to create new Web site Administrators. Do this by clicking on the New button at the bottom of the Profile screen. You can then assign the Administrator to one or more of the Security Zones you have created. Please refer to the Security Zones section of this document for more information.

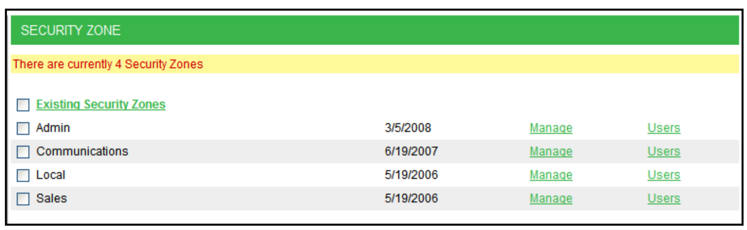
Note: Please use caution when editing another user's login information as they will be unable to login to the system without notification of their new login information.

Storage Report

The Storage Report section allows the administrator to see the files used for the proper functioning of their Web site. Some folder and files are required for the proper operation of this website, but are not accessible through the management area. Other folders and files may have been created by you to store pictures, PDFs, videos, and other files. Please note: this area is for viewing the folders and files on your site, you cannot delete or move files or folders within this area of Web Manager.

Security Zones

Security Zones allow you to restrict the access of site Administrators to the Web Manager Administration area. You can choose specific pages they can edit and components they can edit. **NOTE**: all administrators will be able to see and access all files associated with your site.

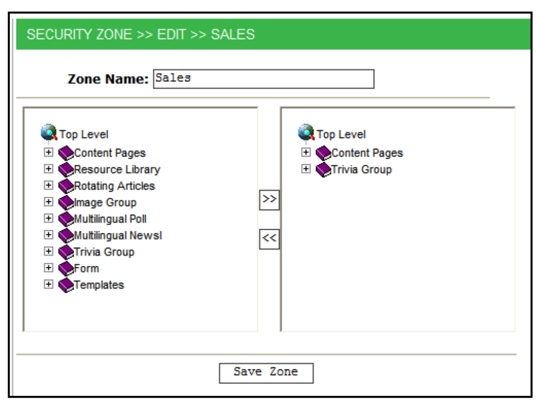


Deleting a Security Zone

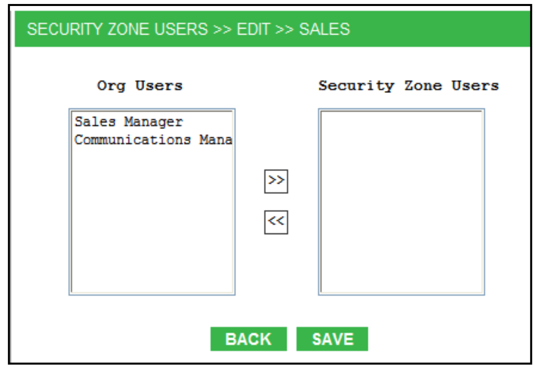
To delete a Security Zone click on the select box to the left of the Security Zone you want to remove. Then click on the 'Delete' button below the list of Security Zones

Add a New Security Zone

To create a new Security Zone, click on the New button below the list of Security Zones. The screen will refresh. First, enter the Zone Name. Then select the areas of your site you would like to include in this Security Zone and use the double arrow button [>>] to add that item to the new Security Zone. Note: you can open folders on the left site to select specific pages or components. Once you have added at least one item to the zone the Save Zone button will appear below the two boxes. Click this button to save your changes.



Zone Users



Once you have created a Security Zone the next step is to assign users to that Zone. Click on the Users link to the right of the Security Zone you would like to add or remove Users from. Organization administrators will be listed on the left hand side of the screen under the heading Org Users. Select the users you wish to assign to this zone by clicking on the corresponding name. Next, use the double arrow button [>>] to add users to the new Security Zone. Click 'Save' to add the Users to the Security Zone. To add more Administrators to your site please refer to the Profile section of this document. **Note**: if you do not add an Administrator to a Security Zone they will have full access to the Administration area for your Web site.

Removing Zone Users

To remove users from a Security Zone, in the Zone Users area, simply select the user from the right hand menu and use the reverse double arrow button [<<] to remove the selected user from the Security Zone. Click 'Save' once you are satisfied with your changes.

Manage a Security Zone

To edit a Security zone simply click on the Manage link to the right of the Security Zone you wish to edit. You will be taken to a screen that looks very similar to the Add Security Zone area where you select specific sections of the Web site you want to include in that zone.

Web Stats Report

This area allows you to report on various statistics related to the use of your Web site. We use a third party tool to collect and report on site usage. Please visit their Web site for more information about how Analog 6.0 works and what the statistics mean.

Web Logs

This area shows you all of the Logs used to run the Web Stats Reports. Because these Log files contain the data required to run the Web Stats Reports we do no recommend deleting them.

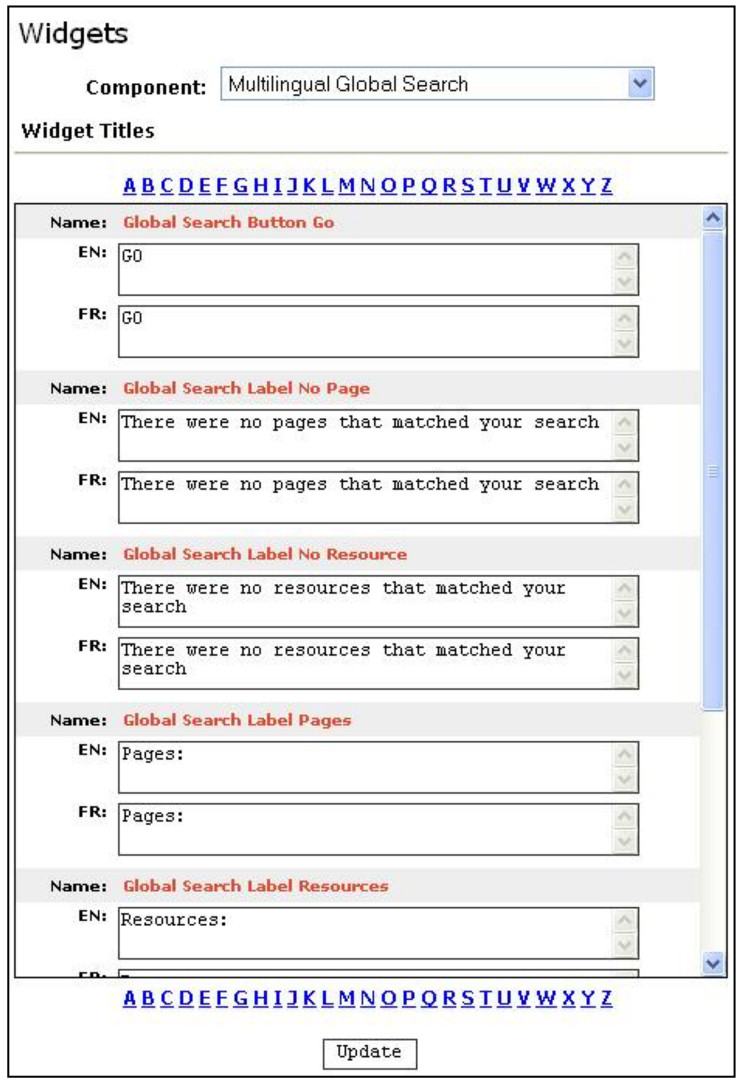
Widgets

Widgets are the labels, headings and warning messages associated with various components. Please make changes to your site Widgets with extreme caution. In the example to the right, both French and English versions of the Newsletter component are shown. The highlighted areas are created using the Widget tools.

Editing Widgets

To edit Widgets, click on the Widgets option in the Administration area of the Menu. The page will refresh and an inventory of Widget Components will appear in a drop-down list. Select the Widgets component you would like to edit.

In the illustration to the right, the user has chosen to edit the "Multilingual Global Search". You now have the ability to update any of these headings or warnings, for each language associated with your Web site. Once you have made all of the necessary changes be sure to click on the Update button at the bottom of the screen.

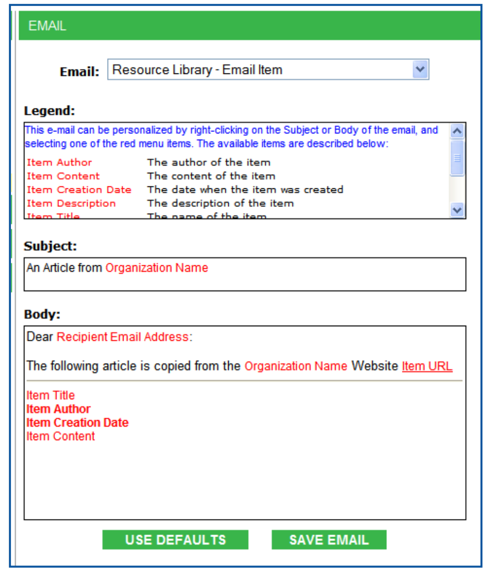


Note: as an Administrator you can only change the text for the heading and warnings. If you would like a font style for a Widget changed please contact customer support.

Elements

Elements are similar to Widgets and are used to facilitate the translation from one language to another language. The difference between elements and widgets is that elements are used for customized components that Port 80 programmers have created for you. There are two types of elements; Global elements and page elements. Global elements facilitate translation between languages for customized components that can are used on *multiple pages* on your organization's site whereas Page elements facilitate translation between languages for customized components that can be used on *a particular page.* All elements are predetermined; therefore you cannot add elements.

System Emails



Some of the Components of your Web site require that emails are sent from the system to site visitors or site Administrators. This area allows you to customize the content of these emails. Please note: the “From” address for all emails sent from your Web site use the email address associated with your organization. If you would like this changed please contact customer support.

To edit an email select the appropriate component from the drop-down list in the System Emails area. The screen will refresh to display the content of the selected email. In the example to the right the user has selected “Resource Library – email item”.

As an administrator you can edit the Subject and the Body of the email. Using the red codes shown in the Legend you can have the system auto insert certain information. In this scenario you could insert the following data:

- Item Author
- Item Content
- Item Creation Date
- Item Description
- Item Title

To use the codes simply right-click on in the Subject of Body areas and select any one of the red codes.

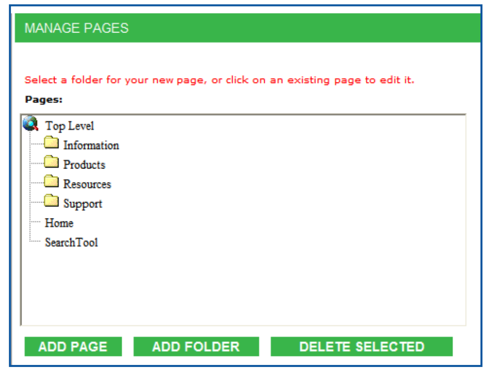
Once you have made the desired changes to the email click on the Save Email button.

To reset the email to the system default email click on the ‘Use Defaults’ button.

CONTENT

This is likely the section of the Web Manager Administration area you will use most frequently. In this section you can add and delete pages, upload and link to files, manage your site navigation and more.

Manage Pages



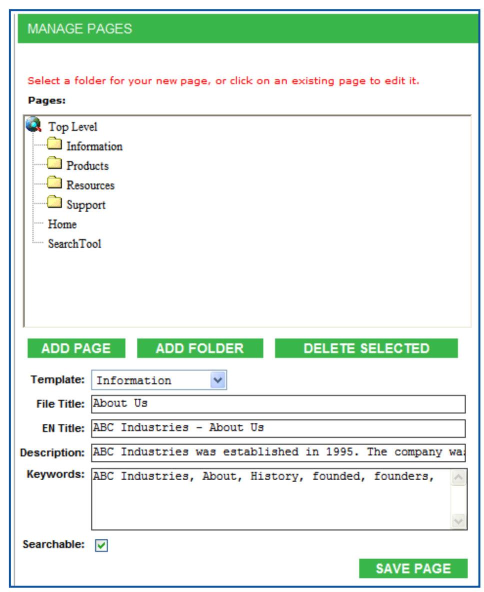
In this area you can:

- Add, delete, and rename pages
- Add, delete, and edit content
- Add and remove components from a page

When you enter the Manage Pages area you will see a list of your Web pages. The Manage Pages area may also contain folders that can contain pages. You can expand or collapse a Folder by clicking on the Folder or Folder name.

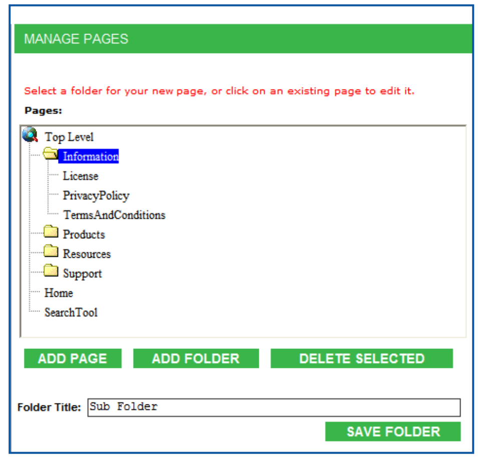
NOTE: The folder structure and page order in this view is not directly related to your site navigation. This area simply shows how folders and pages are stored in the site database. Your site navigation is really just a series of links that point to pages in the database. You will talk about building site navigations later in this document.

Add a Page



1. Select the Folder you would like to add the new page to. A Folder will be highlighted with a blue background when selected.
2. Click on the ADD PAGE button.
3. Using the drop-down list select the **Template** you would like to use. Selecting the correct Template is important as you are unable to change a pages Template once the page is created.
4. Enter a **File Title**. The File Title is used to identify your Web pages in this Manage Pages view. The File Title is also used as part of the URL (web address) for that page. In the screen shot to the right, the URL to the page that is being created would end in – About Us.asp.
5. Enter an **EN (English) Title**. EN Title is the title that will appear in the browser's title bar. **Note:** If you have a multilingual site, an additional input field will appear below File Title. EN Title (English Title) is the title that will appear on your user's Web browser Title Bar when they visit the English page. By default, if no Title is inserted both will use the EN File Title.
6. **Description** is the information that search engine results will display to summarize this page.
7. **Keywords** are used by Search Engines to find your page. Separate all keywords with commas. In general, the higher the correlation is between your keywords and the actual content on your page the higher your page should appear in search engine results.
8. Uncheck the **Searchable** check box if you do not want this page to show up in Searches done with your site. Note: This relates to the Global Search component you can add to your site, not to Search Engines in general.
9. Click on the '**Save'** button to submit the new page.

Add a Folder



1. Select the Folder you would like to add the new Folder to. A Folder will be highlighted with a blue background when selected. If you do not select a Folder the new Folder will be add to the Top (Root) Level.
2. Click on the 'Add Folder' button. A field will appear in which you can enter the Folder Title.
3. Click the 'SAVE FOLDER' button.
4. The Manage Pages area will quickly refresh so that the new Folder is displayed.

Tip: To keep your pages well organized we recommend creating a folder for each of the main sections of your Web site.

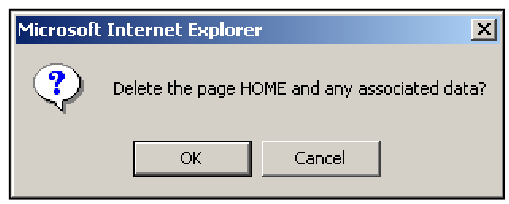
Rename a Page

Select the page you wish to rename. The Page Utility window will refresh and the title of the page you selected will appear in the 'File Title' field. In the 'File Title' field, rename the page and click 'Update Page'. The change will appear in the list of pages.

Reminder: If you are using the Virtual Office application please do not rename or delete the Community page.

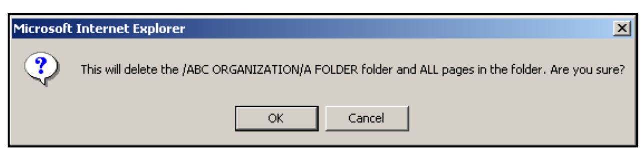
Delete a Page

Select the page you wish to remove. The Page Utility window will update and the title of selected page will appear in the 'File Title' field. Click the '**DELETE SELECTED'** button. A prompt screen will ask you if you would like to delete the page and any associate data. Click 'OK' to delete the page or 'Cancel' to end the process. **Warning: Once you delete a page it is gone… forever!**



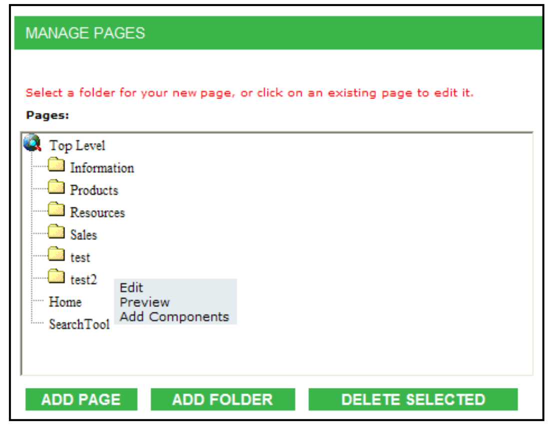
Delete a Folder

Select the Folder you wish to remove and click the '**DELETE SELECTED'** button. A prompt screen will ask you if you would like to delete the folder and all pages within the folder. Click 'OK' to remove the folder or 'Cancel' to end the process. The change will appear in the directory. **Warning: Once you delete a Folder, the Folder and all the pages that were in the Folder are gone … forever!**



Edit, Preview or Add Components to a Page

To Edit, Preview or add Components to a page, run the mouse pointer over the page you would like to edit. An options list will appear. Click on the option you would like to use.

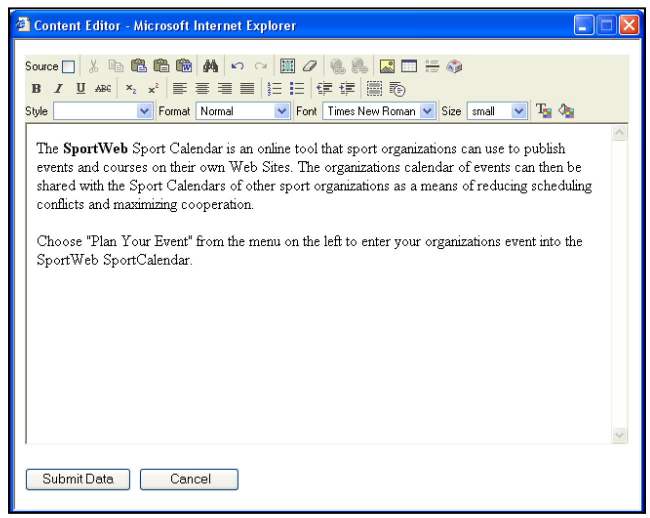


Preview

When you click on 'Preview', the selected page will open. You will see the page exactly as your Web site users will see the page. You will NOT be able to edit any of the page content.

Edit

When you click on 'Edit', the selected page will open. This page looks similar to the live Web page, but unlike the 'Preview' page option, you can edit the page by running your mouse pointer over the Content Area(s) of the page. The editable areas will become highlighted in blue. Click on any highlighted area and the Content Editor will open.



The Content Editor will look like the screen shot shown to the right. Does this window look familiar? The tool bars located at the top are similar to Microsoft© Word, thus allowing you to edit page content using tools that you should be familiar with.

Content can be added and edited in a text format or in HTML. To add content in a text format simply type and add your content onto the blank screen. To add or edit Web content using HTML, click in the 'Source' option box in the top left corner of the Content Editor. Make any necessary changes and/or additions. To return to the Word editor, simply click in the 'Source' option box again.

To accept the changes you have made, either in HTML or Word editor, click on 'Submit Data'. If you click 'Cancel' or you exit the Content Editor without clicking 'Submit Data', all of the changes you have made will not be saved.

When you click on Submit Data, you will be returned to the Edit screen where you will be able to observe the changes you have made. If you would like to make additional changes, simply run your mouse pointer over the highlighted area and click the mouse once to return to the Content Editor window. To return to the 'Manage Pages' screen, simply close the Web page window.

For additional Content Editor Tips, please refer to Appendix A. Most importantly refer to the sections on copying text from Microsoft Word.

Add Components

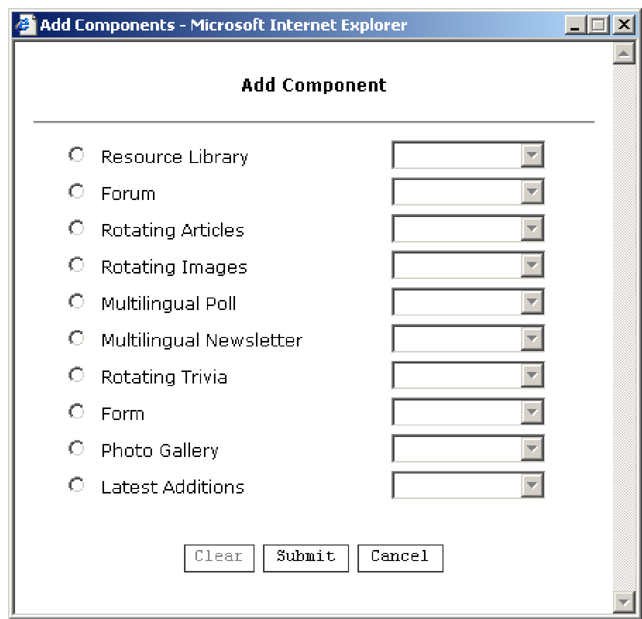
Note: Not all pages can have Components added to them. The template on which the page is based will dictate what can be added to a defined area of the page. Templates determine where Content and Components can be added.

Web Manager has a number of Components which can be used to help add information to your Web site. You can add the following components:

- Resource Library
- Forum
- Rotating Articles
- Rotating Images
- Multilingual Poll
- Multilingual Newsletter
- Rotating Trivia
- Form
- Photo Gallery
- Latest Additions
- Menu Builder

Please note: you may not have access to all Components. For more information about how to manage a specific Component, please refer to the appropriate section below.

While in the Manage Pages Admin area hover your mouse over the page you would like to add a Component to; from the list that appears select Add Components. The page may look similar to a Preview page; however, it will have editable areas on the page noted by the phrase 'Click here to add a component'.



Click on 'Click here to add a component' and the Add Component window (as seen to the right) will pop up.

To add a component, click on the bullet to the left of the corresponding Component and the drop-down menu will become enabled. Choose the specific Component you would like to add from the drop-down menu. Once you are satisfied with your selection, click on the 'Submit' button at the bottom of the screen.

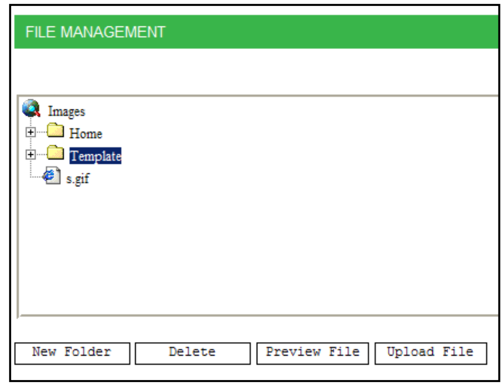
Remove a Component

In the Add Component window (as seen above), click on 'Clear', to remove the Component from the Web page. Removing the component from the page will not delete the component area from the page or the component from the server. Components can still be later added to the page. Click on 'Submit' to continue with the component removal or click 'Cancel' to close the window and revert to the last settings.

File Management

This area allows you to upload files that you can link from your Web pages. These files are not pages but are files that the user can open or are displayed within your Web page. Some examples of files you can upload are images (.jpeg, gif, etc.), MS Office documents, or Adobe Acrobat files.

Add a Folder

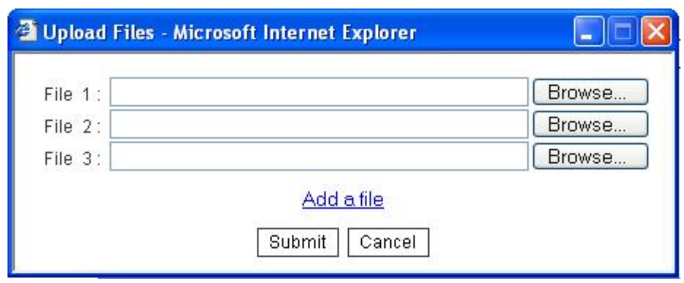


In the File Management window, select the 'New Folder' button. Another window will appear asking for the name for the new folder. Enter the name of the folder and click on 'OK'. The File Management window will update to reflect the changes you have made. You may also nest folders. Nesting folders means creating a folder within a folder. Ensure that you have highlighted the 'parent' folder before clicking the 'New Folder' button.

Delete a Folder

You can delete a folder by selecting the folder you wish to delete. Click the 'Delete' button. A prompt screen will appear confirming the removal process. If you wish to delete the folder and all files within this folder, click 'OK'. The change will appear in the directory.

Upload Files



If you would like to upload a file or files to specific folder select that folder from the list, then click on 'Upload File'. A new window will appear. Click 'Browse' to locate the file on your computer (or computer network). Once the location appears in the file field, continue to add more files in the 'File 2' field if you have more files. Click on 'Submit' to upload the file or press 'Cancel' to exit the window without any changes. Depending on your Internet connection and the size of the file being uploaded, the upload process may take a few seconds to a few minutes. Once the upload is complete a window will appear letting you know the upload was successful. Close this window by clicking on the red 'X' box in the top right corner of the window. You will then see the File Management window, which will automatically update to reflect the addition of the uploaded file(s).

Preview Files

To preview a file, simply select the file from the directory and click 'Preview'. A new window will appear with the file's html link. If the file is an image, you will see the image below the file's html link. If the file is not an image, you will see the 'View File' option below. Click on the link to open or save the file.

Delete File

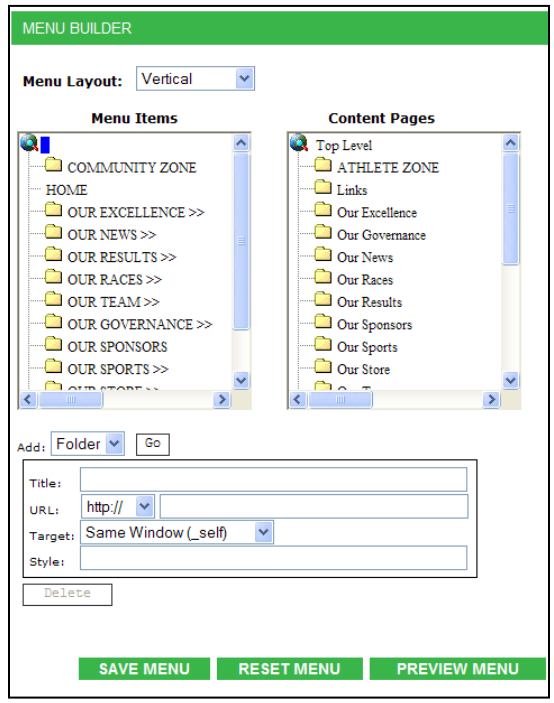
To delete a file, select the file and click 'Delete'. Click 'OK' when prompted to delete the file or click 'Cancel' to return to the File Management area.

Menu Builder

The menu builder Component allows you to build a more dynamic navigation for your Web site: horizontal 'drop-down', vertical 'drop-down', or vertical 'slide'. Many Web site visitors find these types of menus quite useful as they are able to quickly see all of the pages within a section before having to click through to that section.

The Menu Layout you choose will likely be dictated by your templates. There are three layout choices:

- Horizontal – www.hcbc.ca
- Vertical – www.bobsleigh.ca
- Vertical Slide – www.rcybc.ca



There are two options for adding Items to a Menu:

1. **Use the Add drop-down options at the bottom of the Menu Builder page**. A folder can contain multiple items (links), whereas an Item is a single link.
   a. To create a Folder make sure Folder is selected in the Add drop-down box and click on the Go button. You will see that a 'New Folder' is added. You can then change the Title, add a URL that this Folder Item is linked to, determine a Target (Same Window if you are linking to a page on your site or New Window if you are linking to an external page), and for advanced users you can use the Style box to overwrite the style of that particular menu item.
   b. To create an Item follow the procedure for creating a Folder except choose Item form the Add drop-down menu. If you want to Add an Item to a Folder be sure to select the desired first before clicking on the Go button to add that item.
2. **Drag-and-drop folder and/or pages from the Content Pages box into the Menu Items box.** Note: when you drag a Folder from the Content Pages box to the Menu Items box, all pages within that Folder will also be moved. Once you have dragged a Folder or page into the Menu Items area you can click on that Folder or Item and then change that Item's characteristics: Title, URL, Target, and Style. Note: When you drag and page into the Menu Items area it will keep the '.asp' extension in the Title. You may want to delete the '.asp' for all Item Titles.

Note: you can easily re-sort the items in your Menu by using the drag-and-drop feature within the Menu Builder box.

Be sure to click on the Save Menu button once you have finished making your changes.

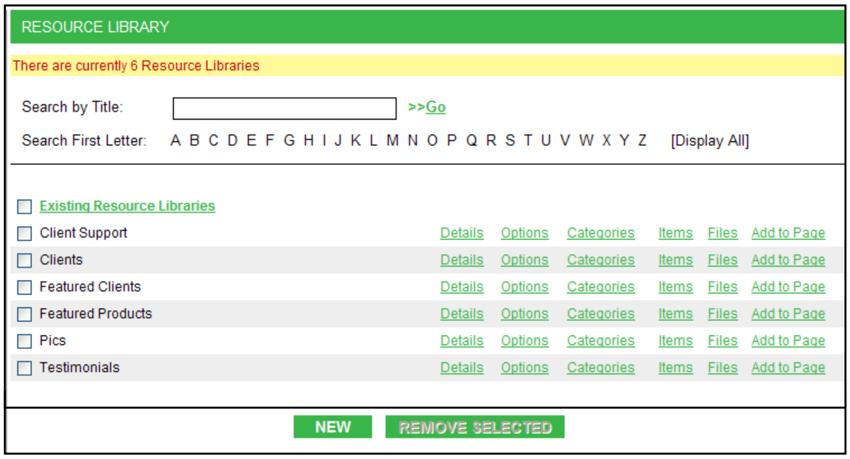
COMPONENTS

Resource Libraries

A Resource Library is a grouping of items that can be organized so that your site visitors can find them as easily as possible. Resource Libraries can be organized into Categories, and each Category can contain multiple Items. There are three general types of Items that can added to a Resource Library: files (i.e. PDFs, Excel spreadsheets, photos, etc.), Links (to other Web sites), and Text (these are items you create using the Content Editor).

Resource Libraries can then be added to one or more pages on your Web site. Resource Libraries can only appear on a page if the template on which the page is based supports them. To add a Resource Library to a Web page, you must be in the CONTENT - Manage Pages area. See the Content Pages - Manage Pages section above for more information about inserting Resource Libraries into Web pages.

As seen in the screen shot to the right, when you select the Resource Library option from the Components menu you will see a list of all of your existing Resource Libraries. If you have numerous libraries you can search for a specific using the tools at the top of the page. You can search for a specific word, using the Search by Title tool, or you can select a letter to search for all Resource Libraries whose title starts with that letter.



Create a New Resource Library

To add a new library, click on 'NEW' button found at the bottom of the list of existing libraries. The page will refresh and you will be able to enter the Resource Library title. You can also indicate if the Resource Library is Searchable. This option is only relevant if your Web site is configured with a Global Search tool. If your site does use the Global Search tool and you would like items from this Resource Library to show up in search results, ensure that the box beside "Searchable" is checked. Click on 'Save' to create the New Resource Library. A notification will appear in the yellow area letting you know if the Resource Library was successfully added. To return to the list of Resource Libraries click on the BACK button.

Delete a Library

To delete a Resource Library click on the check box to the left of the Resource Library you would like to delete. Then click on the 'REMOVE SELECTED' button below the list of Resource Libraries. When the Microsoft Internet Explorer window appears confirming the removal process, click 'OK' to continue or click 'Cancel' to end the removal. Once you select 'OK', the Library name will be deleted along with all the Items it contained.

Managing Resource Libraries

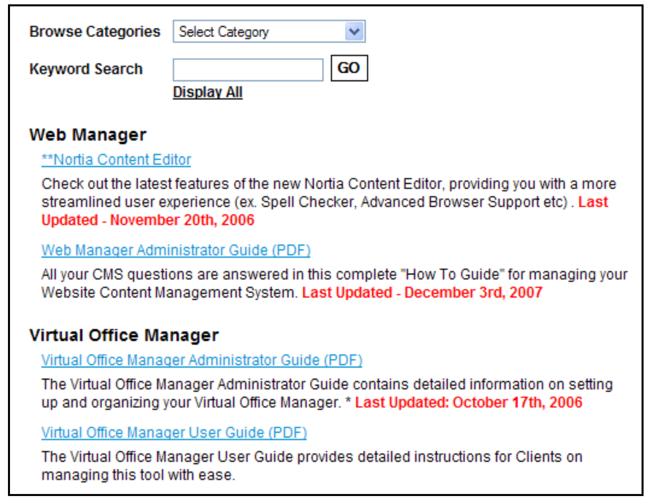
Beside each Resource Library title there are several options, let's look at each one of these individually.

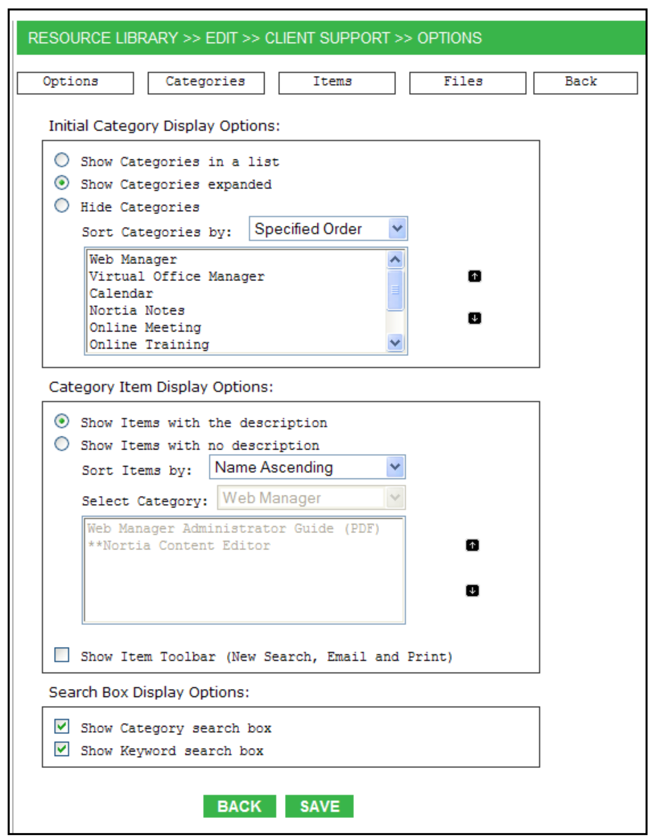
Details

The Details area shows you the same options you saw when you first created the Resource Library; you will be able to update the Resource Library title and determine if the Items in the Resource Library will show up in Global Search results.

Options

The Options window allows the user to customize how the Resource Library will be displayed on their Web site. We will use the screen shot to the right as reference when discussing the various Options one can select for how the Resource Library is displayed. In the screen shot to the right you will see a Browse Categories drop-down list and Keyword Search at the top of the screen. Below these options you see two Categories in bold-black text. Each Category has two items (blue, underlined text) and the items each include a short description.





For this example we have chosen the following settings from the Options area:

- Show Categories expanded
- Show Items with the description
- Show Category search box
- Show Keyword search box

Let's take a look at some of the other options.

Initial Category Display Options:

- **Show Categories in a list** – if this option is select the Categories would only appear in a list, the Web site visitor would not see the options in each Category. They would have to click on the Category title to expand that Category to display the options.
- **Show Categories expanded** – if this option is selected Web Site visitors will see a list of Categories and the Items they contain
- **Hide Categories** – if this option is selected the Categories will not be displayed an the Web visitor would have to use the Category or Keyword Searches to find items. More information on these Searches below.
- **Sort Categories by** – this option allows you to determine the order in which the Categories are displayed on the Web page. You can order the Categories by name in Ascending or Descending order. Ore you can choose to sort them in a Specified Order. If this option is selected you can use the list to sort Categories; select a Category and use the arrows on the right of the box to move it up or down.

Category Item Display Options:

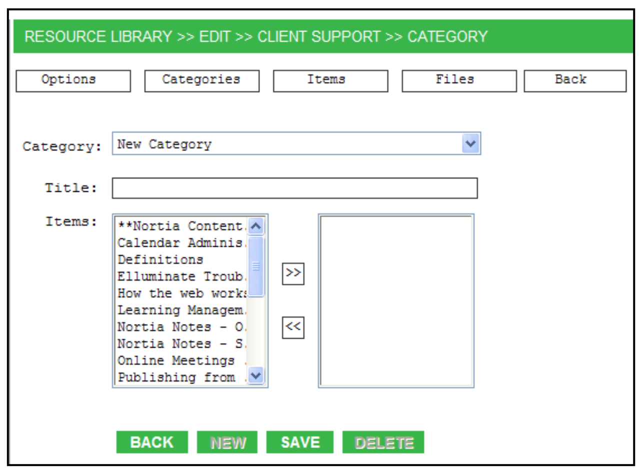
- **Show Items with the Description –** when you create Items you are able to include a short Description about that item. If you select this option the description will be displayed on the Web page.
- **Show Items with no description** – as the title implies, if this option is selected the Item descriptions will not be displayed
- **Sort Items by** - for each Category you can determine the order that the Items are displayed in. You can select Name Ascending, Name Descending, Date Created Ascending, and Date Created Descending, and Specified Order. If you select Specified Order you can then select the desired Category. The box below these options will refresh to list the Items in the selected Category. You can then use the arrows to the right of the box to reorder the Items.

Search Box Display Options:

- **Show Category Search Box** – if this option is selected the Search By Category drop-down list will be displayed on the Web Page. If you only have a few Categories in the Resource Library you would likely not use this option.
- **Show Keyword Search Box** – if this option is selected the Keyword Search Box will be displayed on the Web page. This will allow web visitors to search through a Resource Library using a word or phrase. **Note**: each item in a Resource Library has an area where you can enter Keywords; these are the only words that are searched through.

Categories

As an Administrator you have the ability to create, delete, and edit Categories; you also have the ability to add or remove Items from a Category. To manipulate Categories, select the 'Categories' link to the right of the Resource Library title.



Create Category

To create a new Category:

- enter the Title
- add existing Items to the new Category by selecting the item from the box on the left and clicking on the >> button
- click the 'SAVE' button

Delete Category

Select the 'Category' you wish to delete from the drop-down menu near the top of the screen. The screen will quickly refresh to display the name you have selected in the 'Title' field. Click on the 'DELETE' button to permanently remove the selected Category. Click 'OK' when prompted to confirm the removal or click 'Cancel' to end the removal process. Note: Deleting a Category will not delete the Items within that Category from the server. The individual items will still be available for future selection.

Rename a Category

To rename a Category, select the desired Category from the drop-down menu near the top of the screen. The screen will quickly refresh and the Category name and its associated items will be displayed. Within the 'Title' text field, edit the Category name and click 'SAVE'.

Add or Remove Items from a Category

If you would like to add or remove Items from a Category, first select the category from the 'Category' drop-down list near the top of the screen. The left box displays all Items created in that Resource Library that are not included in the selected Category, whereas the right box contains all Items included in the Category. To **Add** an Item into the Category select it from the box on the left and click on the >> button. To **Remove** an Item from the Category select the Item from the box on the right and click the << button. Once you have completed your changes for the Category click on the 'SAVE' button.

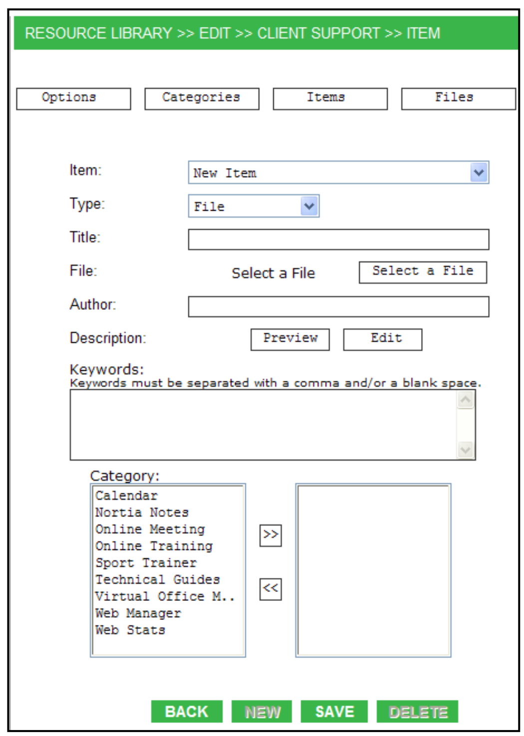
Items

Items refer to files, Web links, and text articles that you wish to add to the Web site. All Items must be associated with a Category within a Resource Library to be displayed. As an Administrator you have the ability to add, delete, and edit Items; as well as add or remove Items from Categories. To access the Items area click on the Items link to the right of the Resource Library you would like to manage.

Adding New Items

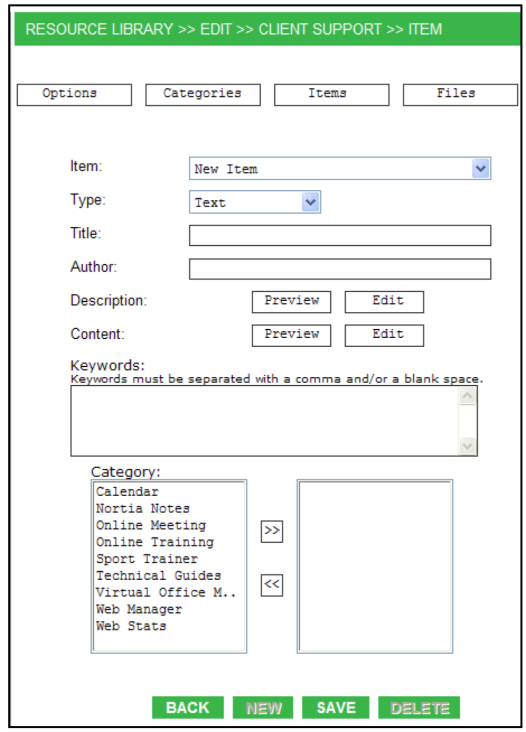
First ensure that '**New Item'** is displayed in the Item drop-down list. Then select the 'Type' of Item you would like to add: File, Text, or Link.

FILE



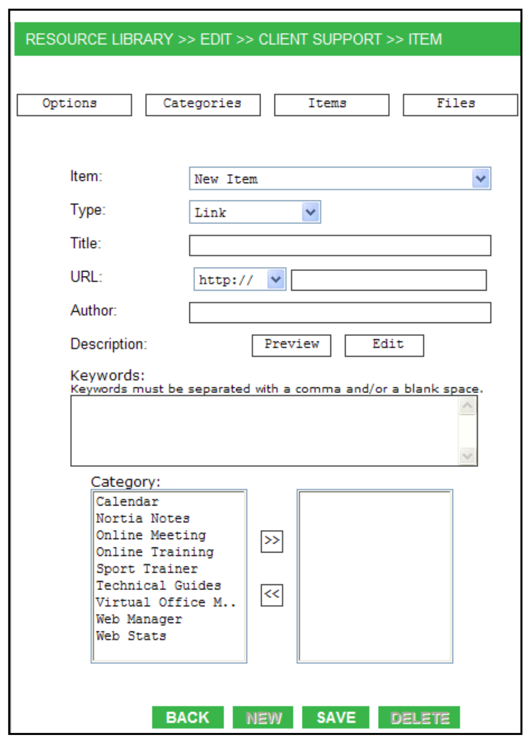
1. Select the 'File' option from the 'Type' drop-down menu. The screen will quickly refresh.
2. Enter the file title in the '**Title'** text field.
3. Click on '**Select a File'**, this will open a window that will allow you to browse your File Management area for the desired file. Each time you create a Resource Library a corresponding folder gets created in your File Management area. You can select a file that has already been uploaded. Or you can upload a new file from your computer (or computer network) to the file management area. You can also search your entire File Management area by clicking on the 'Up One Level' text in the top right corner. Once you have located the desired file click on it and then click on the 'Select' button in the pop-up window. This will close the pop-up window and the name of the file will appear in the New Items area. For more information on Uploading and accessing files please refer to the File Management section above.
4. Next enter the **Author**. This is optional and may be disabled for some organizations.
5. To enter a **Description** for the Item click on the 'Edit' button. This will open the Content Editor. Be sure to click on Submit Data to save the Description.
6. You also have the ability to enter in **Keywords** for the Item. When a user performs a keyword search, the results will list all Items that contain matching Keywords.
7. You can then add this Item to *one or more Categories* using the double-arrows to move the desired Categories from the left box to the right box.
8. Finally, click on 'SAVE' to add this new Item to the database.

TEXT



1. Select the 'Text' option from the 'Type' drop-down menu. The screen will quickly refresh.
2. Enter the Item title in the '**Title**' field.
3. Next enter the **Author**. This is optional and may be disabled for some organizations.
4. To enter a **Description** for the Item click on the 'Edit' button to the right of the word 'Description'. This will open the Content Editor. Be sure to click on Submit Data to save the Description.
5. To enter the content for the Item click on the 'Edit' button to the right of the word 'Content. This will open the Content Editor. You can then create the Content for the Item. Refer to Appendix A for information on how to use the Content Editor. Be sure to click on Submit Data to save the Description.
6. You also have the ability to enter in **Keywords** for the Item. When a Web visitor performs a keyword search, the results will list all Items that contain matching Keywords.
7. You can then add this Item to *one or more* Categories using the double-arrows to move the desired Categories from the left box to the right box.
8. Finally, click on 'SAVE' to add this new Item to the database.

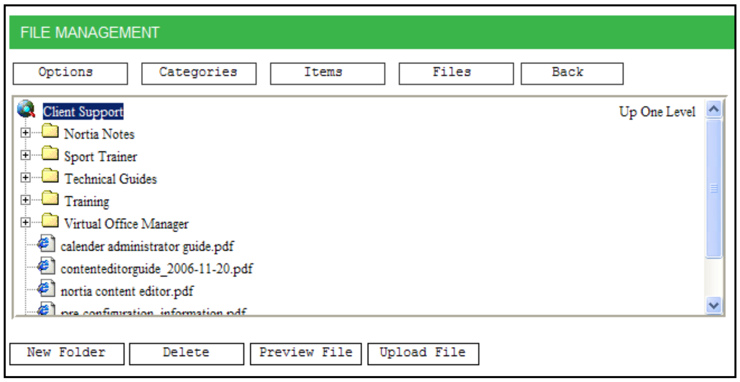
LINK



1. Select the 'Link' option from the 'Type' drop-down menu. The screen will quickly refresh.
2. Enter the Item title in the '**Title**' field.
3. Enter the URL (web address) in the field next to the URL type drop-down list.
4. Next enter the **Author**. This is optional and may be disabled for some organizations.
5. You also have the ability to enter in **Keywords** for the Item. When a Web visitor performs a keyword search, the results will list all Items that contain matching Keywords.
6. You can then add this Item to *one or more* **Categories** using the double-arrows to move the desired Categories from the left box to the right box.
7. Finally, click on '**SAVE**' to add this new Item to the database.

Files

Click on the 'Files' button to the right of the Resource Library for which you would like to manage files. This will take you to the File Management area for that Resource Library. Here you can Upload files, delete files, Create Folders, and Delete folders. You can also access the rest of the File Management area by click on the Up One Level text in the top right corner of the screen. For more information on Managing files please refer to the File Management section above.



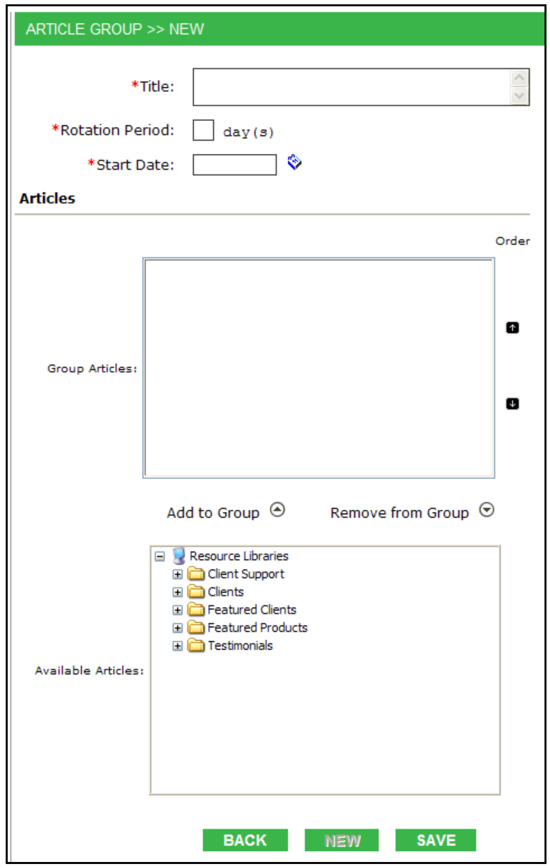
Add to Page

If you click on the Add to Page link in the Resource Library area you will be taken to the Manage Pages area, where you can use the Add Component tool to add the Resource Library to a page. Please refer to the Add Component section above for more information.

Rotating Article Groups

This area will allow you to set up Articles (Items) that can rotate in a given area of your Web site automatically. Rotating Article Groups can contain any Item from any Resource Library. These rotating features will provide a dynamic point of interest to your Web page. Many people include Rotating Articles Groups on their site for such features as the "Story of the Week" or "Article of the Day". When you enter the Rotating Article Groups area you will see a list of the existing Rotating Article Groups.

Create a New Rotating Article Group



1. Click on the '**NEW'** button, the screen will refresh to display the Article Group – New window.
2. Enter the **Title**.
3. Select the rotation period – between 1 and 9 days.
4. Enter a Start Date. Do this by clicking on the Calendar icon, and selecting a day.
5. The next step is to **add Articles** (Resource Library Items) to the Rotating Articles Group. The 'Available Articles:' box contains articles you have previously created. The 'Group Articles:' box contains a list of articles belonging to this Rotating Article Group. Search through the 'Available Articles:' box and select a file to add to this Rotating Article Group. Once the desired file is selected, click on the 'Add to Group' arrow to add the article to the 'Group Articles' box. Continue to add articles, one at a time.
6. Once your list is complete, use the 'Up' and 'Down' buttons on the right of the 'Group Articles' box to **change the order** in which these articles appear. Remember, articles will rotate based on the rotation period you set. So, be careful of any time sensitive material. For example, if an article is an advertisement for an event, ensure that the article is displayed at an optimal time by adjusting the start date, the rotation period and by using the 'Up' and 'Down' arrows.
7. When finished creating your new Rotating Articles Group, click '**SAVE**'.

Delete a Library

To delete a Rotating Article Group click on the check box to the left of the Rotating Article Group you would like to delete. Then click on the 'REMOVE SELECTED' button below the list of Rotating Article Groups. When the Microsoft Internet Explorer window appears confirming the removal process, click 'OK' to continue or click 'Cancel' to end the removal.

Manage an Rotating Articles Group

To Manage an existing Rotating Articles Group, click on the 'Manage' link to the right of the Rotating Article Group you would like to manage. The screen will refresh and you will see a screen similar to the New Rotating Article Group window. You can change the title, Rotation Period, Start Date, Articles in the rotation, and order that the articles appear. Click SAVE once your changes are complete.

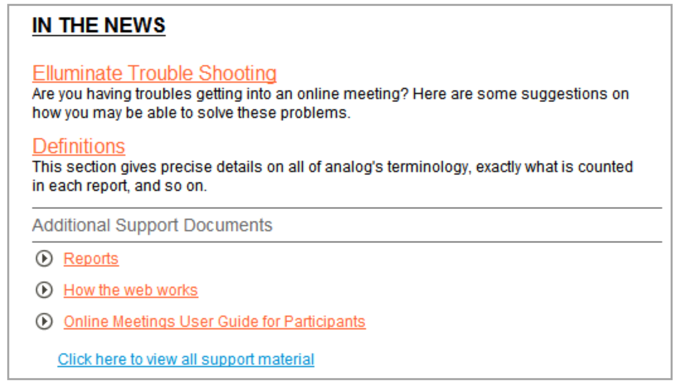
Add to Page

If you click on the Add to Page link in the Rotating Article Group area you will be taken to the Manage Pages area, where you can use the Add Component tool to add the Resource Library to a page.

Latest Additions

The Latest Additions tool helps you keep your Web site content updated and dynamic. The Latest Additions component can be displayed in a number of ways to quickly inform your site visitors about newly added content. The Latest Additions tool allows you to add direct links to the Items most recently added to a specific Resource Library or Rotating Article Group.

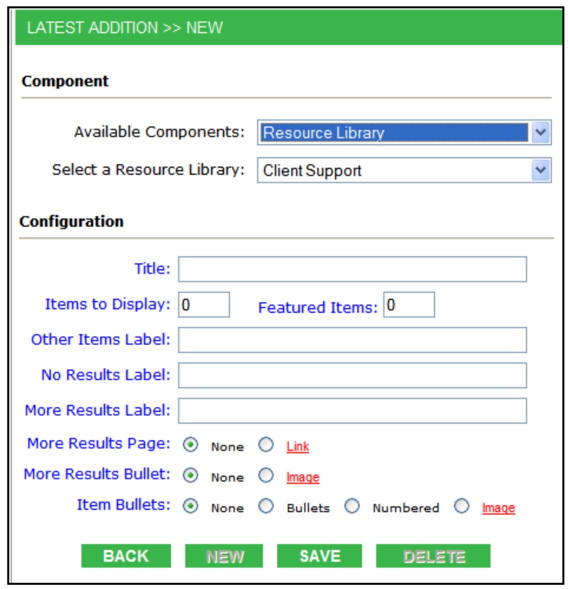
Sample 1: Latest Addition with no Featured Items.



Sample 2: Latest Addition with 5 Items to Display and 2 Featured Items

Creating a Latest Addition Group

1. Once in the Latest Additions area click on the '**NEW**' button at the bottom of the screen
2. Select the **Available Component** you are going to create the Latest Additions Component for - Resource Library or Rotating Articles. Once you have made this selection another drop-down list will appear.
3. Select the specific Resource Library or Rotating Article Group.
4. Add a **Title** to identify this Latest Addition group.
5. Enter the maximum number of **Items to Display** on the Web Page(s) this component will be added to. When a new Item is added to the Resource Library or Rotating Article Group you selected in step 3, a link to the new Item will be added to the top of the list and the bottom Item Link will be removed.
6. You can also indicate a number of **Featured Items** to display. Featured Items will not only show a link to that item, but also the Item description. *See the sample on the right above.*
7. **Other Items Label**: the text you enter will be displayed between the Featured Items and the other Latest Addition Links. In Sample 2 above, *Additional Support Documents* was added in this field.
8. **No Results Label**: if there is a chance that there may be no Latest Additions, enter the text that you would like to display in the Latest Additions area on your Web page.
9. **More Results Label**: at the bottom of the list of Latest Additions that appears on your Web Page you can choose to include a link to a page on your Web site that contains more items. Usually this is page that displays the Resource Library or Rotating Article Group selected in step 3. The text you enter here is what will be displayed on the Web page. For example, you could enter "click here to view all items".
10. **More Results Page**: if you do not want to include a link select None, otherwise click on the Red Link text and select the page to use for the More Result link.
11. **More Results Bullet**: you can choose to have no bullet beside the More Results Label, or you can choose an image from your File Management area by clicking on the Red Image link.
12. **Item Bullets**: for the list of items that appears on your Web page you can choose to include no bullet or number, Bullets, Numbers, or an Image.



13. Click ‘**SAVE**’ to create the new **Latest Additions Group**.

Delete a Latest Additions Group

To delete a Latest Additions Group click on the check box to the left of the Latest Additions Group you would like to delete. Then click on the ‘REMOVE SELECTED’ button below the list of Latest Additions.

Manage a Latest Addition Group

Click on the ‘Manage’ link to the right of the Latest Additions Group you would like to change. The ‘Latest Addition: Edit’ window will appear. Make the necessary changes and click ‘SAVE’.

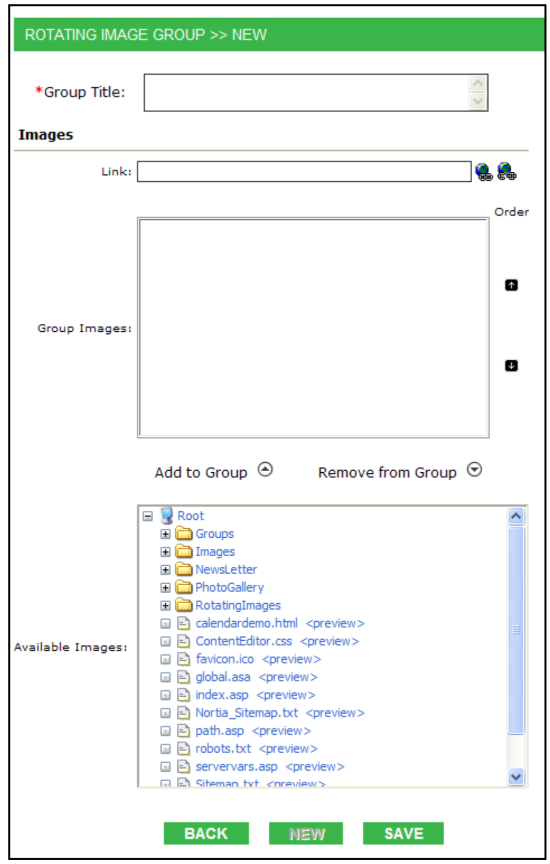
Add to Page

If you click on the Add to Page link in the Latest Additions Group area you will be taken to the Manage Pages area, where you can use the Add Component tool to add the Resource Library to a page.

Rotating Image Groups

Rotating Image Groups provide a fresh and dynamic Component to your Web site. Each time a user visits a page that contains a Rotating Image Group, a new image in the group will be displayed.

Create New Image Group



1. To add a new Image Group, click on the '**NEW**' button at the bottom of the Image Group area. The screen will refresh.
2. Enter the **Group Title**.
3. Select images from the '**Available Images'** box by highlighting them and clicking on the 'Add to Group' arrow to add them to the 'Group Images' box. Continue adding as many images as you wish. Use the Up and Down arrows to the right of the 'Group Images' box to customize the image rotation order.
4. You can add a Link to any image by selecting that iamge in the Group Images box and then clicking on the Hyperlink icon to the right of the Link box. This will open the Insert Link window. You can then enter a link, Choose a link, or select one of your Web Pages to link to. By clicking on the Show Pages link you can browse your File Management area to find an image or file you would like to link to.
5. Click 'SAVE' once you have completed your new Image Group.

Upload Images

Images must first be uploaded to the web server before they can be added to an Image Group. Click on the Upload Images link to the right of the list of existing Image Groups. The screen will refresh to display the File Management area for that specific Image Group. You can click on the Up One Level text to view your entire File Mangement area. For more information about the File Management process please refer to the File Management section above.

Add to Page

If you click on the Add to Page link in the Rotating Image Group area you will be taken to the Manage Pages area, where you can use the Add Component tool to add the Rotating Image Group to a page.

Delete a Rotating Image Groups

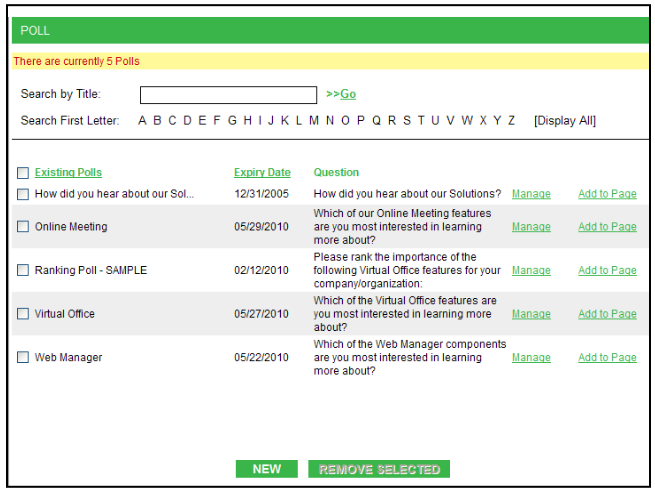
To delete a Rotating Image Group click on the check box to the left of the Rotating Image Group you would like to delete. Then click on the 'REMOVE SELECTED' button below the list of Rotating Image Groups.

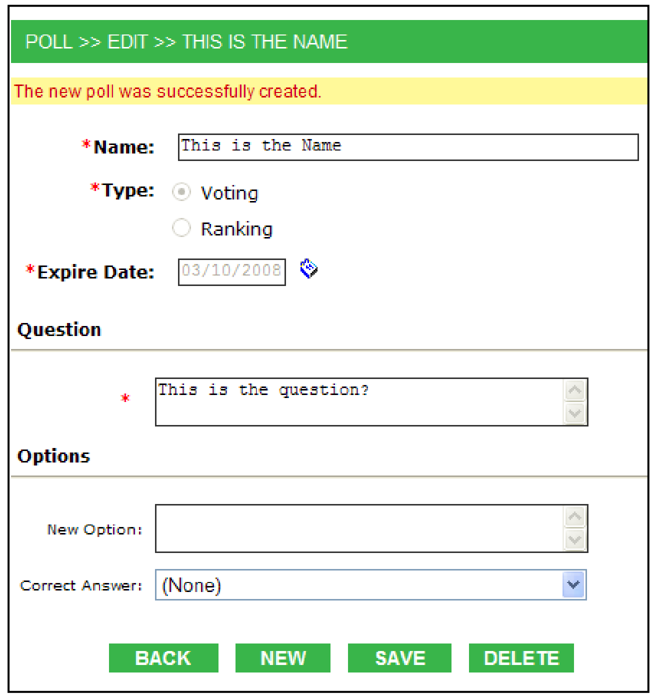
Manage a Latest Addition Group

Click on the 'Manage' link to the right of the Rotating Image Group you would like to change. The 'Rotating Image Group: Edit' window will appear. Make the necessary changes and click 'SAVE'.

Polls

Polls create an interactive dimension to your Web site. There are two types of polls available: Voting and Ranking. Once in the Poll area you can Search for Existing Polls in two ways: by entering a word to Search By Title or by clicking on a letter to Search by the First Letter in the Pool title.





Creating a New Poll

1. Click on the '**NEW**' button at the bottom of the Poll area.
2. Enter the **Name** of the poll.
3. Select the **Expire Date** by clicking on the Calendar icon and selecting a day. Once the Expiry Date occurs Web visitors will not be able to participate in the Poll they will only be able to view the Poll results.
4. Select the **Type** of Poll:
   i. **Voting** is the direct numerical accumulation of all the responses entered by your user. In voting polls, users may only pick one option. For example, if 50 people out of 100 users input into the poll they prefer cars, then 50% of the voters prefer cars. The combined accumulation of single option answers is totalled and shown to the user after he or she submits their answer.
   ii. **Ranking** polls are also a numerical accumulation. However, the user submits multiple answers creating a list of options. A combination of all the list rankings submitted is combined to generate a master ranking. For example, if most people ranked SUVs as their favourite automobile and the bus as their least favourite, then SUV would be at the top of the ranking while bus would be at the bottom of the ranking.
5. Enter the poll **Question**.
6. Click '**SAVE**'. You have to save the Poll before you can enter Options.
7. Enter the first New Option for the Pool.
8. Repeat steps 6 and 7 to enter multiple options.
9. Once all Options are entered you can select a **Correct Answer**. This may not be applicable for all polls.

Delete a Poll

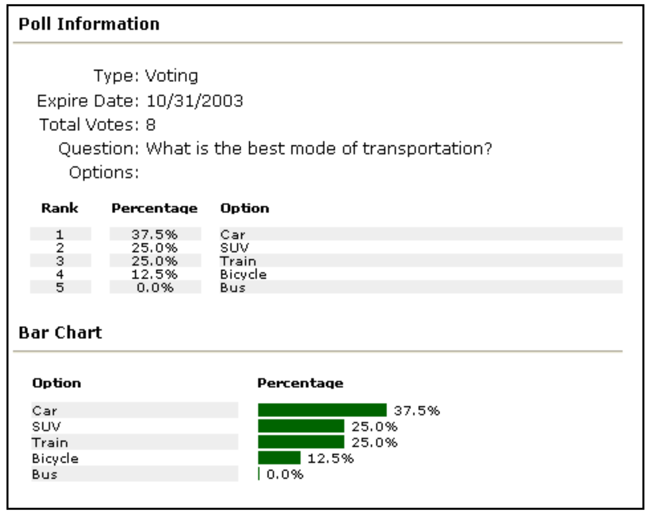
To delete a Poll click on the check box to the left of the Poll you would like to delete. Then click on the 'REMOVE SELECTED' button below the list of Rotating Image Groups.

Manage

Click on the 'Manage' link to the right of the Poll you would like to change. The 'Rotating Image Group: Edit' window will appear. Make the necessary changes and click 'SAVE'.

Statistics

Click on the ‘Statistics’ link to the right of the Poll for which you would like to view the statistics. The page will refresh to display the results for the selected Poll. (see the screen shot to the right).



Add to Page

If you click on the Add to Page link in the Poll area you will be taken to the Manage Pages area, where you can use the Add Component tool to add the Poll to a page.

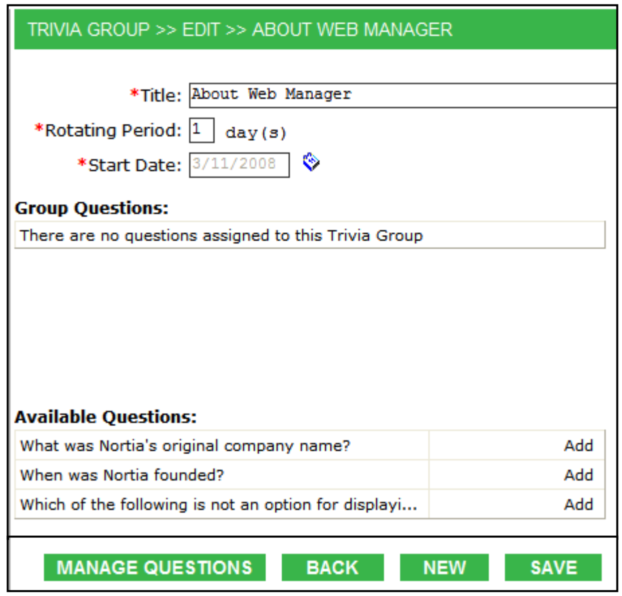
Warning: If a poll is added to a page (i.e. using Add Components) and this poll is deleted, the poll and all corresponding data will be erased from the page.

Trivia Groups

Trivia Groups allow you to 'test' your Web users' knowledge on a variety of subjects. Create an unlimited number of Trivia questions and set them to rotate on a fixed schedule. Trivia Questions can be added to any page of the site.

Creating a New Trivia Group

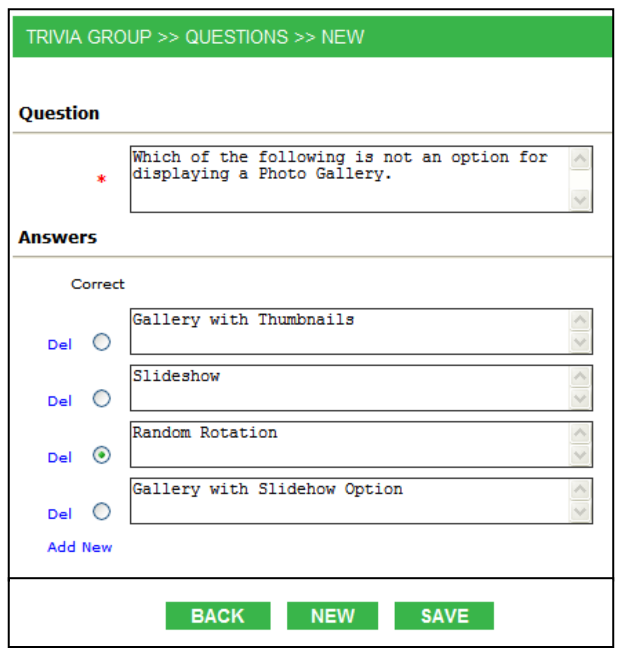
1. Click on the '**NEW'** button at the bottom of the Trivia Group screen.
2. Enter the Trivia Group **Title**.
3. Set the **Rotation Period** – between 1 and 9 days. This determines how frequently a new question will appear on the designated Web page.
4. Select a **Start Date** by clicking on the calendar icon and choosing a day.
5. Add **Questions** to this new Trivia Group by clicking on the word Add next to the Available Question you would like to include. Repeat this step of each Question you would like to add to the Trivia Group. If you want to create a new Question be sure to click the SAVE button first. Refer to the section below on Creating New Questions.
6. Click '**SAVE**'.



Creating a New Question

When managing an existing Trivia Group or Creating a New Trivia Group you may want to create a New Question to add to the Group. Follow these instructions:

1. Click on the **MANAGE QUESTIONS** button.
2. Click on the **NEW** button.
3. Type in your **Question**.
4. Enter an **Answer**.
5. If you would like to add additional answers click on the **Add** Button. A new Answer box will appear.
6. Using the radio buttons indicate which answer is the **Correct** answer.
7. Click **SAVE**.
8. Click **BACK** to go to the previous screen.



Managing a Trivia Group

Click on the Manage link next to the Trivia Group you would like to Manage. You can then change the Title, Rotation Period, Start Date, and Questions included in the Group.

Deleting a Trivia Group

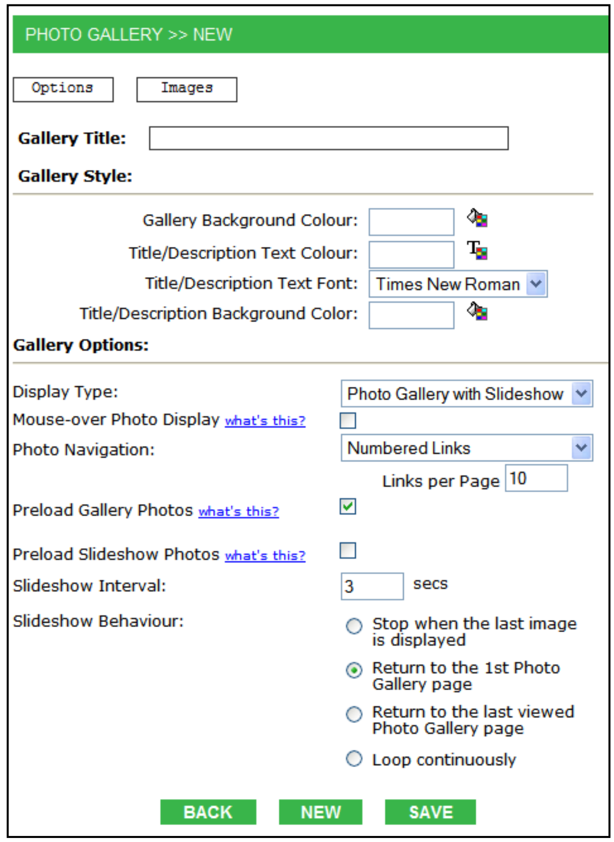
To delete a Trivia Group, click on the checkbox(es) next to the Trivia Group(s) you would like to delete. Click on the REMOVE SELECTED button to permanently delete the Trivia Group(s).

Photo Gallery

Create multiple, theme-specific Photo Galleries that can be added to any page as a Component. Display your Photo Gallery with a display image and numbered navigation to select other images in the gallery or image with rollover thumbnails; with either option you can choose to have a link to a slideshow version of the Photo Gallery.

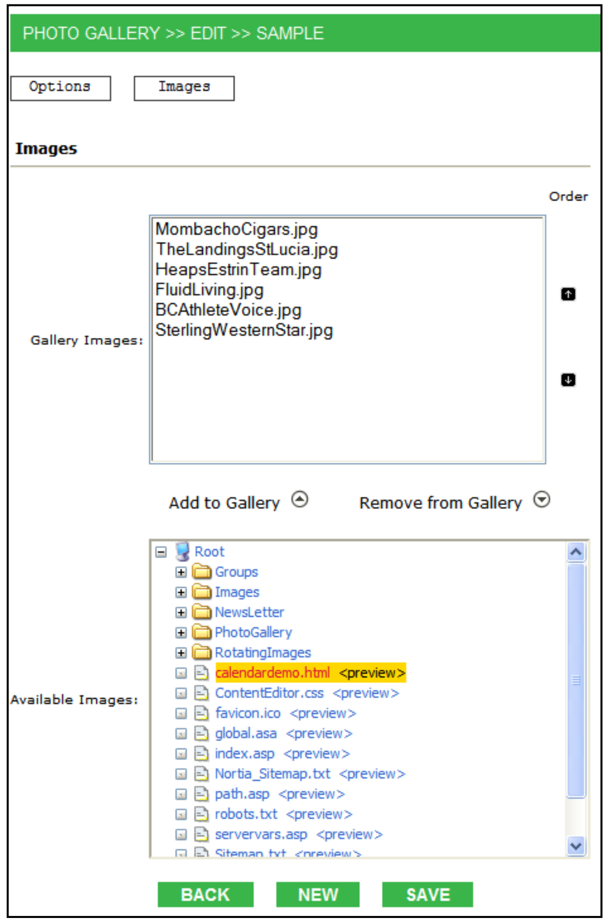
Creating a Photo Gallery is a two-step process the first is to upload photos into the admin area and the second step is to configure the Photo Gallery (this includes selecting the pictures to include in the gallery).

Creating a NEW Photo Gallery



1. Click on the NEW button at the bottom of the Photo Gallery area. The screen will refresh to display the Photo Gallery Options area – as seen to the right.
2. Add a gallery title into the **Gallery Title** field.
3. **Gallery Style**: If no Gallery Styles are entered the colour and font styles will be dictated by the template of the page on which you are going to display the Photo Gallery.
4. **Gallery Options**:
   a. **Display Type** – you have the following options: Photo Gallery Only, Photo Gallery with Slideshow, or Slideshow only. See samples below.
   b. You can turn on the **Mouse-Over Photo Display** so that users simply have to move their mouse over top of the thumbnail or link to display the image.
   c. You can customize the how Web users access images within a Photo Gallery by determining the Photo Navigation – either Numbered Links or Thumbnails. See the samples below.
   d. You also have the choice to **Preload Photos** for both the Gallery and Slideshow options. Preloading means that all of the images in the Gallery will be downloaded as soon as a user visits the page. It may take a little longer to load the page, but will give the user a better experience when viewing different pictures within the Gallery.
   e. If you have chose to use the Slideshow option you can determine the **Slideshow Interval** – how long are pictures displayed for before the next image is displayed.
   f. Finally, you can select the **Slideshow Behaviour** for how the system should behave once the Slideshow has been completed.
5. Once you have set the Gallery Style and Gallery Options be sure to click on the **SAVE** button at the bottom of the screen.

Adding Images to a Photo Gallery



Once you have created a Photo Gallery follow these instructions to add images to your Gallery.

1. Click on the **Images** button at the top of the New/Manage Photo Gallery screen.
2. The Available Images box shows a complete list of all files and folders in your File Management area. Select images from the 'Available Images' box and click on the 'Add to Gallery' button to add the image to the 'Gallery Images' box. NOTE: To insert the image into a specific order first click on the image you would like to add it before from the Gallery Images window and then find the image in the Available Images window and click on the Add to Gallery button.
3. Preview files – you can preview a file by clicking on the <preview> link to the right of the file name.
4. Customize the image order by selecting an image from the 'Gallery Images' box and clicking on the 'Up' and 'Down' Order arrows to the right of the Gallery Image box to move the image accordingly. Note: You can move multiple images at once by using the CTRL or Shift keys when selecting the images to move.
5. Click 'SAVE'.
6. Click 'New' to create another gallery or click 'Back' to return to the main Photo Gallery screen.

Upload Images

If you would like to upload additional images to be used in a Photo Gallery you can do so by going to your Manage Files area, or by clicking on the Upload Images link to the right of any Photo Gallery. If you click on the Upload images link you will be taken directly to the Photo Gallery folder in your Manage Files area. Please refer to the Manage Files section above for information about creating Folders and Uploading Files.

Manage an existing Photo Gallery

To manage a specific Photo Gallery click on the Manage link to the right of the desired Photo Gallery. You will be able to change the Photo Gallery Options and manage the Images in the chosen Photo Gallery.

Add to Page

Once you have created a Photo Gallery you can add it to a page by clicking on the Add to Page link to the right of the Photo Gallery title. This will take you to the Manage Pages area where you can use the Add Components function to add the Photo Gallery to a Web page.

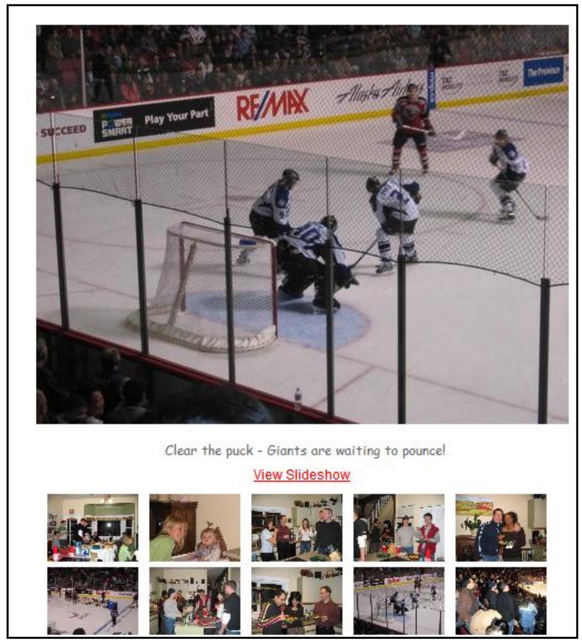
Deleting a Gallery

To delete a Photo Gallery, click on the checkbox next to the Photo Gallery you would like to delete. Click on the REMOVE SELECTED button to permanently delete the Photo Gallery. Please Note – this does not delete any of the images from the File Management area.

Photo Gallery Samples

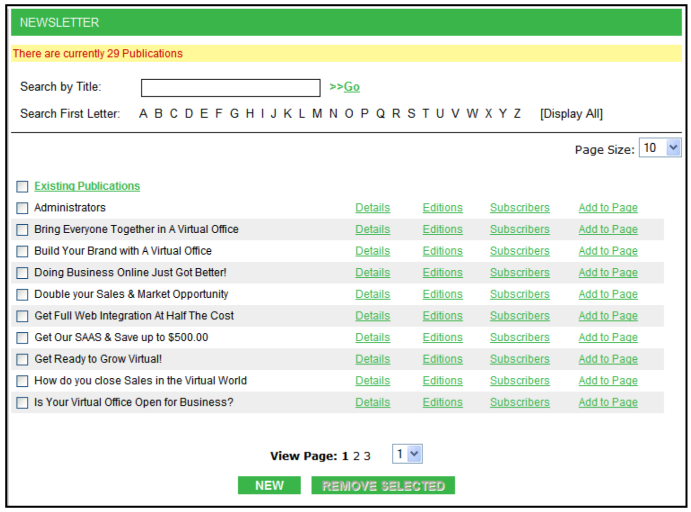
Numbered Links

Thumbnails



Newsletters

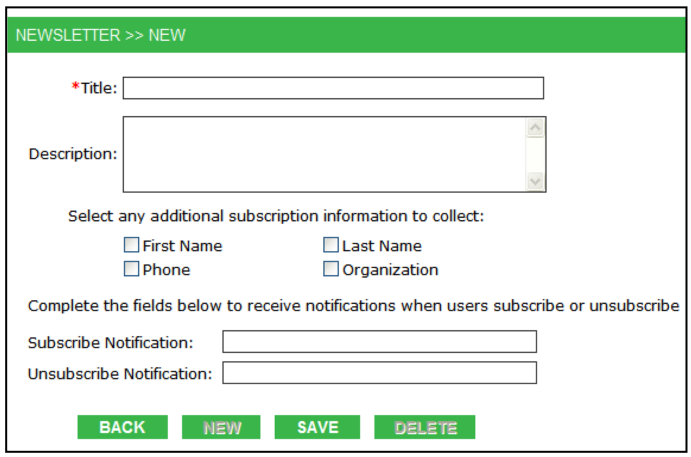
The Newsletter system allows you to send newsletters to subscribers. You can have multiple Publications (Newletters), however users must sign up for each Publication individually. Each publication is like a magazine. Subscribing to one magazine will not automatically sign you up for other magazines. Each newsletter can have multiple Editions. Editions are like issues. For example, if 'Auto News' were a publication, I would send out the May edition, or the June edition to the Subscribers.



Newsletters are Components that can be added to a designated area of a Web page. Adding the newsletter to a Web page is necessary if you would like Web visitors to be able to sign-up to receive that Newsletter.

When you enter the Newsletter area you will see a list of existing Publications. If you have numerous Publications you can use the Search by Title or Search by First Letter tools to find a specific Publication.

Creating a Publication



1. Click on the **NEW** button at the bottom of the Newsletter screen
2. Enter the **Title** for your new Publication (Newsletter).
3. Enter a **Description** for the Publication.
4. **Subscription Information:** Select which fields you would like displayed in the sign-up area that you will add to a Web page. Note: by default the email address field is displayed.
5. You can also enter an email address in the Subscribe Notification and Unsubscribe notification to receive an email when some subscribes or unsubscribes from the Publication.
6. Click SAVE to save the Publication.

Delete a Publication

To delete a Publication, click on checkbox to the left of the Publication that you would like to delete. Then click on the REMOVE SELECTED button. A prompt will appear confirming the publication removal. If you wish to delete this publication and any associated data, click 'OK' to delete. NOTE: If you delete a Publication will delete the Publication's Subscriber list and all Editions associate with that publication.

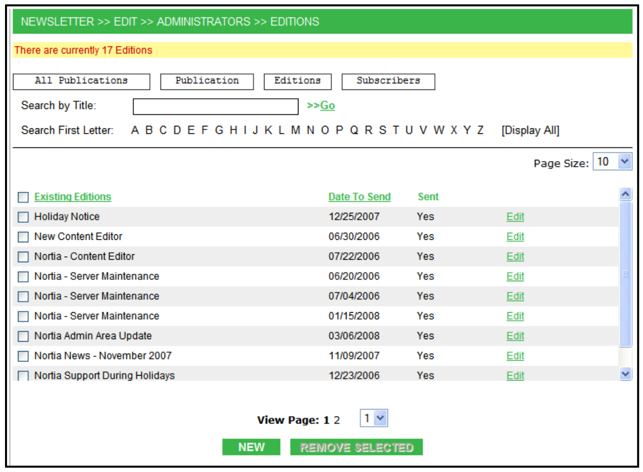
Details

To edit the information you included when you created a Publication click on the Details link to the right of that Publication.

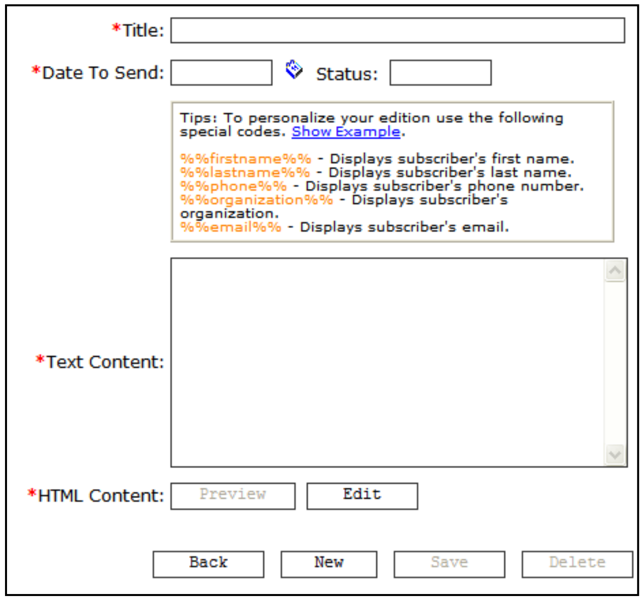
Editions

To create a new Edition for a Publication or to edit and existing Edition click on the **Editions** link to the right of a Publication title. This will take you to the Editions area for the chosen Publication.

You can search for existing Editions by using the Search by Title or Search by First Letter tools.

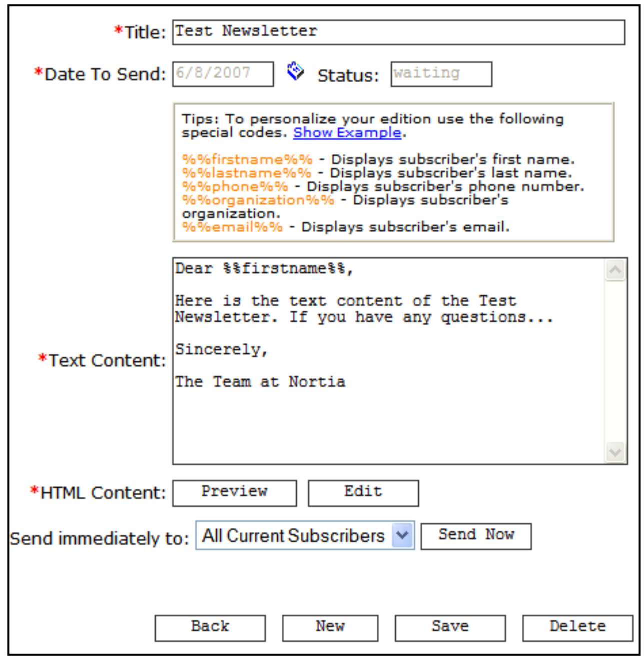


Create New Editions



1. Click on the 'NEW' button to create a new Edition.
2. The page will refresh (see right illustration).
3. Enter the **Title** – this will help you identify the Edition through the Administration console and will be used in the subject line of the Newsletter email that gets sent to the Subscribers.
4. Enter the **Date to Send** (by clicking on the calendar icon beside the date field) – this Edition will be automatically sent to all Subscribers for this Publication at 1:00 am PST on the date indicated.
5. The **Status** field is for administrative purposes only. For Newsletters that have not been sent it will say "Waiting" and once an Edition has been completely sent to all Subscribers it will say "Sent". Please note: if you have more than 50 subscribers the Newsletter will get sent in batches of 50 – so the more subscribers you have the longer it may take to send – not a big issue, but just don't expect the Status message to change immediately.
6. Editions have to be written in both ***HTML*** and ***Text*** formats to accommodate the email preferences of the subscribers. The difference between the two formats is the ability of HTML newsletters to include formatting and pictures while Text newsletters will not. The easiest way to create your newsletter in both HTML and Text formats without having to re-type the content is to enter the Text content first. Next, copy the text edition by selecting (highlighting) the content and pressing 'Ctrl' and 'C' at the same time. Click on the 'Edit' button beside 'HTML Content' to open up the Content Editor window. For more information on using the Content Editor please refer to Appendix A. Paste the text into the content window by pressing the 'Ctrl' and 'V' button at the same time. Now, you can start formatting the text by adding pictures or tables, increasing text size, add bulleted text etc. Once you are satisfied with your content, click on 'Submit Data' to accept all the formatting changes. The Content Editor window will close. You can preview the HTML version by clicking on 'Preview' beside 'HTML content'. A sample of your newsletter will open.
7. Be sure to click the '**SAVE** button at the bottom of the screen. If the Edition is successfully saved you will see a message ("The new edition was successfully created") in the green status bar (directly below the Editions: Edit text).

Send Immediately To



Once the new edition is successfully saved, the 'Send immediately to:" option will become available. This allows you to send a test Newsletter to an I*ndividual Email* address; or send the Newsletter immediately to *All Current Subscribers*.

To send the Newsletter to **All Current Subscribers** click on the Send Now button. The Newsletter will be sent. Please note: because you have already sent the message to all Subscribers it will not be sent again on the date indicated in the Date to Send field. If, for some reason, you would like to send the same Edition again you can do so by using the same Send Now functionality

You can send a test Newsletter to an Individual Email by changing the drop-down list beside Send Immediately To. Once you select Individual Email you will see a new field appear (Enter Email Address) where you can enter the email address you would like to send the Newsletter to. You can also select the format to send the message in – either HTML or Text. Click on Send Now to send the test Newsletter. Please note: sending the Newsletter to an Individual Email will not override the Date to Send function – the Edition will still be sent to All Subscribers on the date indicated.

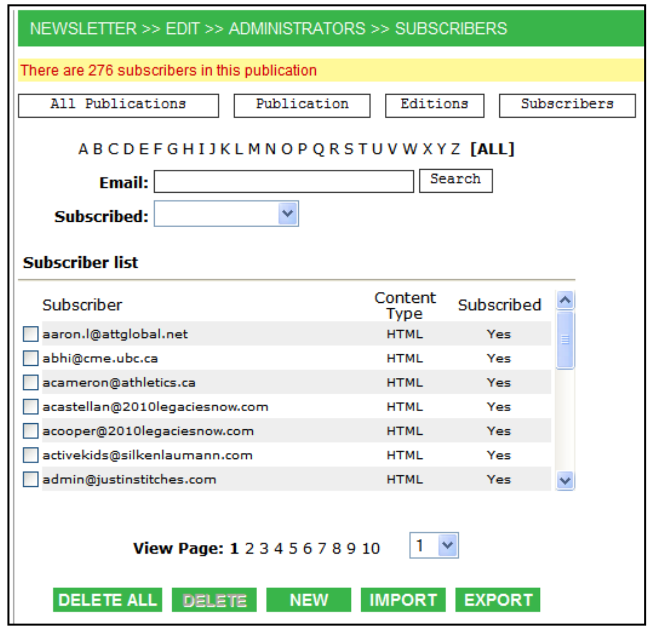
Edit an existing Edition

Once you are in the Editions area for a selected Publication you will see a list of all existing Editions. Click on the Edit link to make changes to that specific Edition. Refer to Create New Editions section above for more information.

Delete an Edition

In the Editions area, click on the checkbox to the left of the Edition you would like to delete. Then click on the REMOVE SELECTED button at the bottom of the screen. The Edition will be permanently deleted.

Subscribers

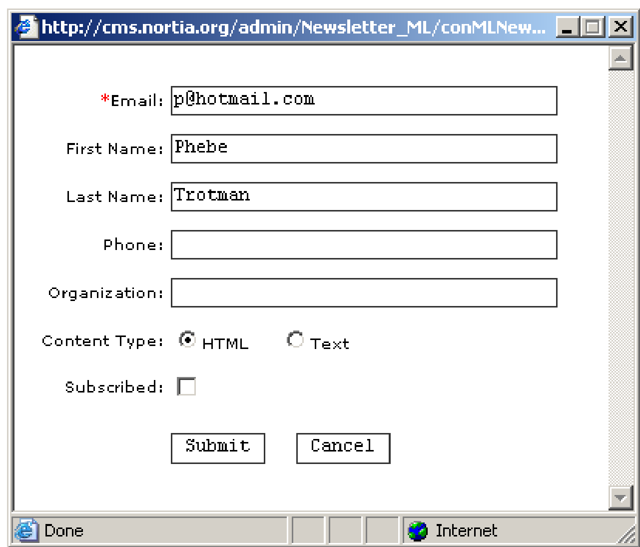


In the main Newsletter area click on the Subscribers link to the right of the Publication you would like to manage. This will take you to the Subscribers area for that publication where you will be able you add, change and delete newsletter subscribers. You will also be able to import and export Subscriber lists. When you use the Add Components function to add a Newsletter to a Web Page, Web visitors will be able to sign-up for that Publication. When a Web visitor signs-up they will automatically be added to the Subscribers list.

In the Subscribers area you can Search for current Subscribers by their email address using the alphabetic search tool or entering all or part of their email address in the Email search field.

You can also filter the list of Subscribers by their subscription status.

Add a Subscriber



1. Once in the Subscribers area you can add a new Subscriber by clicking on the **NEW** button near the bottom of the screen.
2. A pop-up window will appear prompting for the subscribers email address, other subscriber information and the desired Newsletter format (HTML or text).
3. Enter in the appropriate information and click on '**Submit**'. You will be returned to the 'Subscribers' page and the new subscriber will be added to the 'Subscriber list'.

View Subscriber Details

To view the details of a Subscriber's information, click on the appropriate 'Subscriber' email address. A new window will open listing the Subscriber's profile. You can edit the Subscriber information in this window. We do not recommend changing a Subscribers status from Not Subscribed to Subscribed. Make any necessary changes and click '**Submit**' to store the changes.

Delete a Subscriber

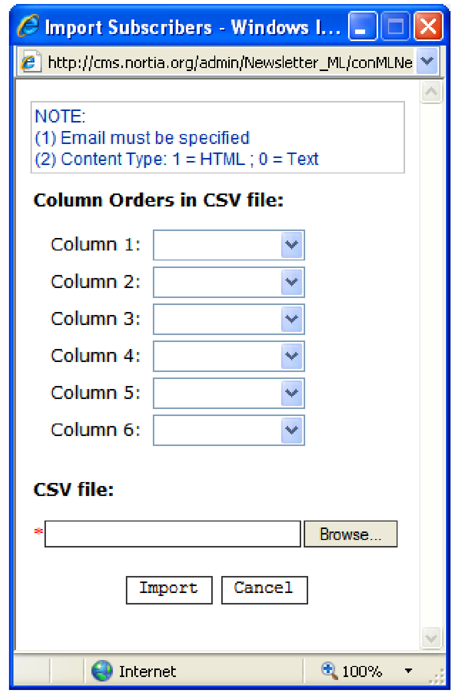
To **delete** a subscriber, click on the box next to the subscriber name. You will know the user has been successfully selected because a check mark will appear in the box next to the user's name. Once the appropriate subscriber has been selected, the 'Delete' button will become enabled. Click on the '**Delete**' button to remove the selected subscriber from the system. A prompt will appear confirming the removal process. If you wish to delete the selected subscriber from this publication click 'OK' to continue or click 'Cancel' to keep the subscriber active within the system.

Importing and Exporting Subscriber Lists

You are able to Import lists of Subscribers from a CSV file, as well as you can export a list of subscribers to a CSV file. You will see the Import and Export buttons at the bottom of your Subscribers list.

Importing Subscribers

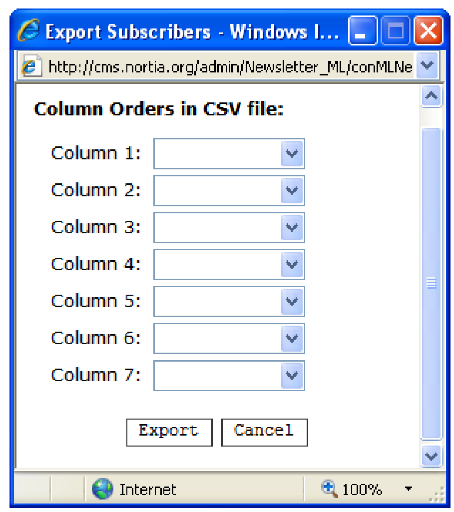
When you click on the Import subscribers button a new window will appear (as seen to the right). You can then browse your computer for the file you would like to import from. The Column Orders in the CSV file drop-downs allow you to ‘map’ the fields from your file into the correct fields in the database. Your CSV file should contain a column indicating the format the subscriber wishes to receive their newsletter in – enter a ‘1’ for HTML and a ‘0’ for text only. **Please note**: your CSV should not contain column headings or any blank rows.



WARNING: When importing a list of Subscribers the system will ignore all subscribers who are currently subscribed to that publication – this is based on email address. If you delete the subscriber list, and import a new list you will lose the subscribed/unsubscribed status for all people in the list. Thus people who have previously unsubscribed will receive future Editions. This would be considered **spamming**, as you are continuing to send newsletters to people who have previously indicated that they do not wish to receive future communications.

Exporting Subscribers

When you click on the Export subscribers button a new window will appear (as seen to the right). This allows you to select which fields you wish to export. Once you have selected the fields you wish to Export click on the Export button. A File Download button will appear asking you if you would like to Open or Save the file. Note: You must Save the file before you can view it.

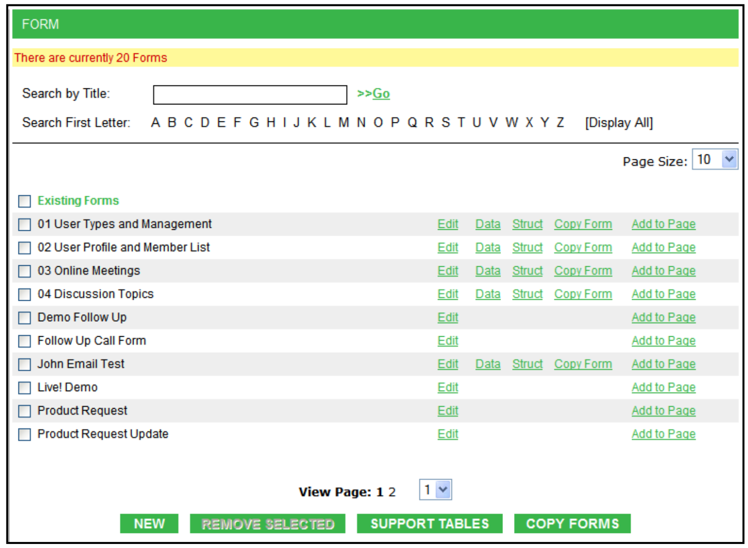


Add to Page

Once you have created a Newsletter you can add it to a page by clicking on the Add to Page link to the right of the Publication title. This will take you to the Manage Pages area where you can use the Add Components function to add the Newsletter sign-up to a Web page.

Form Builder

Web Manager allows you to build custom data collection Forms that can be completed by your Web site visitors. There is no limit to the amount of information you collect, however we recommend making the forms as easy to fill out as possible.

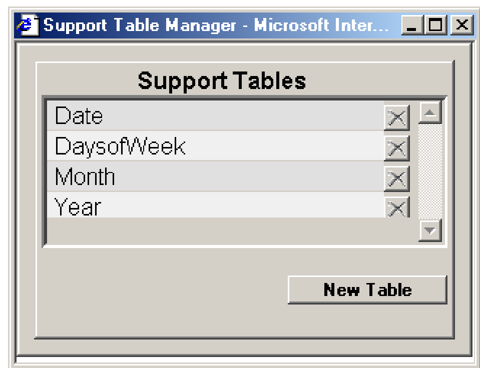


When you enter the Forms area you will see a list of all the forms that you have already created. You can search for existing Forms by Title or by First Letter.

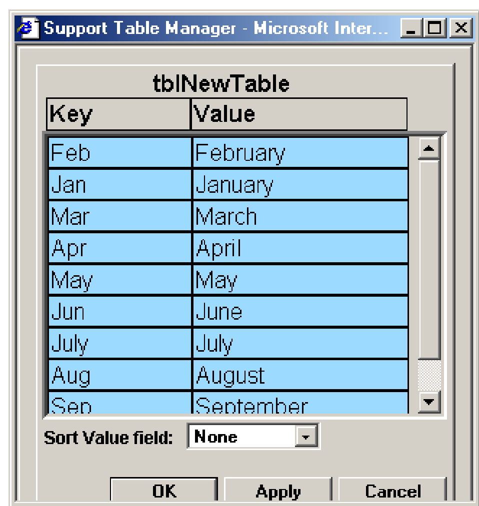
Deleting Forms

You can delete an existing Form by clicking on the checkbox to the left of the Form name. Then click on the REMOVE SELECTED button to permanently delete that Form and all data associated with the Form.

Support Tables



When you create forms you are able to include drop-down option lists. There are some option lists that you may want to use on several forms. The Support Tables tool allows you to build lists that can be reused on any Form. To create a new Support Table click on the button at the bottom of the **Forms: Manage** area. This will open the Support Table Manager (as seen to the right). You can edit an existing table by clicking on its name, or create a new table by clicking on the New Table button.



The first thing you should do is enter the table name. Click on **tblNewTable,** this area will become editable so you can enter the Support Table name. You can now enter the Key and Value for each option in the drop-down list. The Key and the Value can be the same (as they would in the Year table, Key = 2004 and Value = 2004) or the Key can be a short version of the Value (as in the Month table, Key = Feb and value = February). Once you have completed your table click on the Ok button to save the Support Table. We will talk more about using Support Table later.

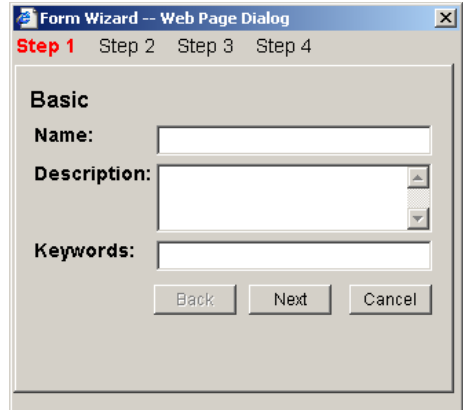
Creating Forms

To create a new Form click on the 'NEW' button at the bottom of the Forms page. This will open the create Form Wizard.

Form Wizard

Step 1- Basic

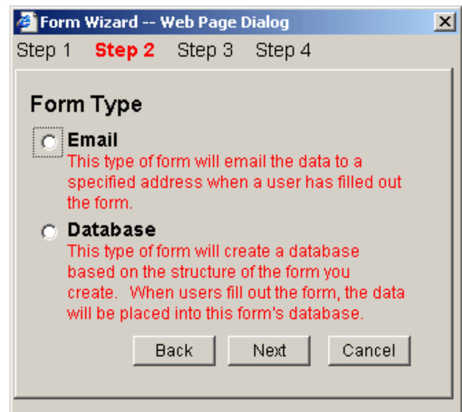
The first step is to assign a name to the form. Type in a name for the form in the Name field. You also have the option of including a description for the Form and keywords that could help identify the Form.



Step 2 - Form Type

Select a form type by clicking in the option circle next to the desired type.

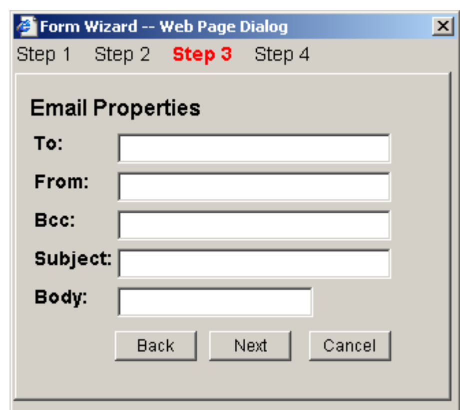
- **Email** - This type of form will email the data to a specified address when a user has filled out the form.
- **Database** - This type of form will create a database based on the structure of the Form you create. When users fill out the form, the data will be placed into this form's database. You also have the option of having the data Emailed to one or more people.



Step 3 – Email or Database Properties

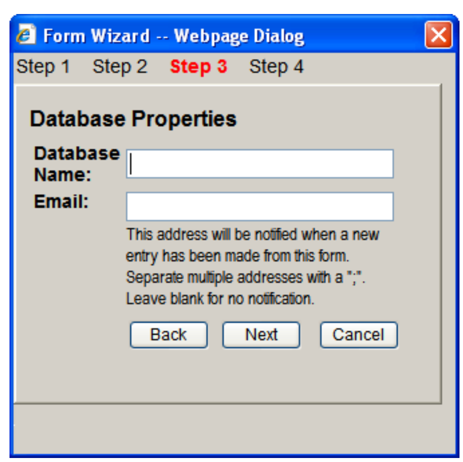
If you selected Email in step 2 you will see the Email Properties fields in Step 3.

- To: The email address for the recipient of the form data.
- From: The email address that will appear in the 'From' field of the email. All emails require that a sender appear in the 'From' field, therefore a valid email address must be entered.
- Bcc (optional): If you wish to send the Form data to additional Email address, but you do not wish their email address to be visible to other recipients, enter their address into this field.
- Subject: Subject of the email
- Body (optional): Text that will appear above the Form data in the email.



If you selected Database in step 2 you will see the Database Properties fields in Step 3.

- Assign a name for your database. When assigning a Database Name, a space in the name will be automatically replaced with an underscore. We recommend keeping the name for your database the same as the name of the form for organizational purposes.
- Email: each time a Web visitor submits a Form you can have the data sent to one or more Email address



Step 4 – Select Pages

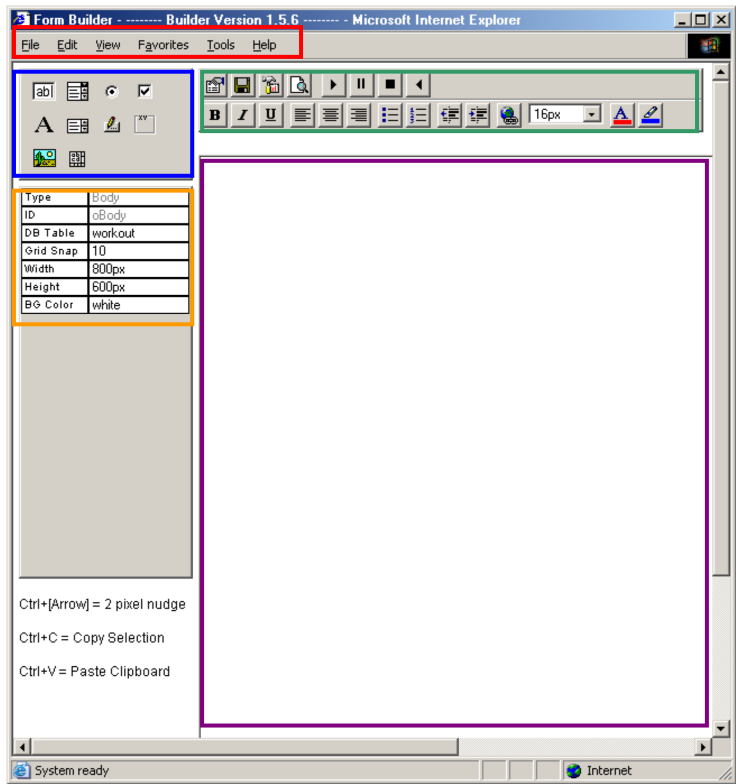
Assign Success and Failed pages for the form. Depending on the status of the Form submission, Web users will be directed to the corresponding page assigned. Use the Select Pages icon (the box with the …) to search for pages you have created.

Click on the '**Finished**' button to start building your Form.

Building a Form

Once you have finished the Form Wizard you will be able to start building your Form. The Form Builder window looks like the screen shot to the right. The Form Builder window is divided into 5 major areas:

1. Some of the standard Windows **Menu items** appear in the top menu area (File, Edit, etc.)
2. Near the top left corner are the **Form Builder Tools**.
3. Below the Form Builder Tools is the **Properties Table** for the Form Builder item that is currently selected.
4. To the right of the Form Builder Tools are the **Tool Bar buttons**.
5. The large area is referred to as the **Form Template.**



Form Template

To change the basic look of your Form you can click anywhere in the Form Template and then adjust the values in the Properties Table.

- Grid Snap – when you are dragging items around the Form Template they will snap to the nearest X and Y coordinates that is a multiple of the value you use for the Grip Snap – we would recommend using the default value of 10
- Width – this is the width of the entire form. Because your form will be displayed on a Web page that is likely smaller than the 800 px used as the default we would recommend changing this value to between 500 and 600 px.
- Height – the height of the Form will vary from Form to Form depending on how much data is to be collected. You can start building your Form and if you run out of room at the bottom increase the Height value.
- BC Color - click on the colour name (to the right of BG Color), this will open the colour palette so you can choose a new colour for the Background Colour of the entire Form

Form Builder Tools and related Property Tables

To add an item to your Form Template drag a Form Builder Tool onto the Form Template. Once an Item has been dragged into the Form area you can customize its properties by changing the values in the Properties Table. You will notice the table of properties will change each time you select a different item. To incorporate one of the following tools into your form, simply drag and drop the tool icon onto your form template – items cannot be customized until they are added to the form. Here is a brief description of each of the Form Builder Tools and their related properties:

Text Box
Text boxes are large blank fields where users (Athletes or Coaches) can input data. If you select a Text Field the next step would be to customize your item, by editing its Properties Table. You are able to customize a Text Box's:

- **Name** – This is the name for this item as it will appear in the database.
- **Numeric** – will the user be entering text information or a number? By selecting the default 'False' option, the user will not be able to add in Numeric information, only text info can be added. In order to change this to allow the user to add in either text or numeric information, click in the box and change the entry to 'True'.
- **Required** – will the user be able to leave the Text Box blank or will they have to input some data before submitting the form? The default option is 'False' therefore the user must enter in data before this form can be successfully submitted.
- **Maximum Length** - the maximum number of characters that can be entered into this Text Box.
- **Value** – the default text that will appear in the text box prior to the user's entry
- **Tab Index** – The Tab Index is the order in which the user will progress through the items in a form when using the Tab button. We will look at setting Tab Order shortly.
- **Location** – The X and Y coordinates establish the location of the Text Box on the page.
- **Width** – The width of the Text Box.
- **Height** – The height of the Text Box.
- **Z index** – This is the stacking order of an item in relation to other form items. For example if you have an item with a Z index of 1 and another item with a Z index of 2, the item with a Z index of 2 will appear 'on top' of the other item. Z index numbers begin at 0.

Drop-down Box

A Drop-down Box provides a list of options that the user can choose from. Once you have dragged a new Drop-down Box onto the Form Template you can customize its properties by editing the Properties Table. As with Text Boxes you can customize the **Name**, **Tab Order**, its **Location**, and the **Width** of the box. Other properties that can be customized are:

- **Data Source –** this is the list of options that will appear in the Drop-down Box. You can use the Date Source drop-down list to select a previsouly created Support Table, or if you would like to create a new list of options for this Drop-down Box right click on the item and select **'Manage Items'** from the drop-down menu that appears. This will open the Manage Items where you can enter a Value and Text for each option. The Text will appear in the Drop-down Box option list, but the Value is what will be stored in the Form database. Click on **'Add'** to add extra options to your item. (Please Note: In order to view the last option entered in the Manage Items window, click **'Add'** so that there is an extra option field available before you close the window.) When finished click on the 'X' in the top right corner to clse the Manage Items window.
- **Display Mode** – please keep this at the default setting - All

Radio Button

Radio buttons are used as a select option feature. By grouping radio buttons (assigning them the same Name in their Properties Table) users will only be able to select one option from the group. The "Value" of the radio button chosen (by the User) from a group of radio buttons will be placed in the database. For clarity, we recommend using the same text for the Value as used to label the radio button.

Check Box

Check boxes have similar properties to Radio Buttons. However, users have the ability to select *multiple* Check Boxes that have been grouped. Check Boxes are grouped together by giving them the same Name in the Properties Table.

Label

You can add a word, phrase, or sentence to your Form by dragging a Label onto the Form template and then editing the text. To edit the text that appears double-click on the Label item (that has been dragged into the template), you will then be able to edit the text. You can further customize a Label by changing the values in its Properties Table:

- Location, Height, Width, and Z Order
- **BG Colour** – click on the colour name, this will open the colour palette so you can choose a new colour for the Background Colour of the Label
- **Border width** – type in the desired thickness of the border (0 = no border)
- **Border colour** – click on the colour name, this will open the colour palette so you can choose a new colour
- **Border style** – use the drop-down menu to pick one of the available styles

You can change additional Label properties by using the Tool Bar Buttons. Many of these buttons correspond to similar buttons you might use in MS word. For example – bold, italics, underline, etc. You can also use the text size drop-down box to customize the font size. In addition, you can change the text colour by using the Text Colour button (the A with the red line underneath it).

Select Box
Select boxes are very similar to drop-down menus, however multiple options are visible at the same time and the user can select one or more of the options. Please refer to the Drop Box description for additional information on customizing a Select box.

Frame
Frames can be used to help format your Form. Because you can customize the border and/or background colour of a Frame you can make groupings of items in your Form stand out from the rest of the Form. Create a Form by dragging it onto the Form Template. You can the position and resize the frame by selecting it with your mouse and dragging it to the desired location, or hold down the left-mouse button on a corner or side of the item and use your mouse to increase or decrease its length or width. You can also use the Properties Table to change the following:

- Location – by changing the X and Y values
- Width and Height
- **BG Colour** - click on the colour name, this will open the colour palette so you can choose a new colour for the Background Colour of the Label
- **Border width** – type in the desired thickness of the border (0 = no border)
- **Border colour** – click on the colour name, this will open the colour palette so you can choose a new colour
- **Border style** – use the drop-down menu to pick one of the available styles

Image
You can insert images into the Form by dragging and dropping the image icon onto the Form Template. Select the image. Right click on the image and scroll down to select **'Properties'**. In the Image window, select **'Choose Image'** to select or upload an image. Once you have selected the image, click **'Submit'**. The image will appear in the image window, customize the size and layout of the image and select **'OK'** to add your image to your form. To add a new image refer to the section on uploading files.

Text Area
Text Areas are very similar to Text Boxes, however a Text Area provides a larger field in which a user can input information.

Submit Query
The Submit Query button is required at the bottom of every Form. The button is used by Athlete and Coaches to submit the information they inputted into the Form. By clicking on the button the information will be transferred to, and stored in the Form database. Although you have the ability to change the text that appears on the button, the function of this button will always remain as a submit tool. To change the button label edit the Text field in the Properties Table for this Item.

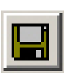
Additional Features

Form Formatting

You can format one item by selecting that item or you can select several items by holding down your Shift key and left clicking on each of the items you would like to format. Next right click to reveal the Options list for formatting the selected items. Note: the options list will change depending on which items you select. These are the formatting options that may be available:

- **Copy** – to copy the item(s) you have selected
- **Paste** – to paste the item(s) you have copied
- **Send to Back** – will send selected item(s) to the back of the template so other items will appear in front of them
- **Bring to Front –** will reorder the items, so the selected item(s) will appear in front of all other items in the template
- **Align Left –** will move all of the selected item(s) so they are in line with the selected item that is furthest left
- **Align Top** – will move all of the selected item(s) so they are in line with the selected item that is furthest to the top
- **Space Vertically** – this option will only work for items that have already be organized in a vertical format, by selecting Space Vertically the spaces between the items will all become consistent
- **Same Height** – all items will be increased to the same height of the largest item that has been selected
- **Same Width** - all items will be increased to the same width of the widest item that has been selected
- **Delete**

Main Tool Bar Options



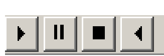
The **'Save'** button will save the form in its 'raw' format. Clicking on **'Save'** will store the form within the Form Builder.

Once you have finished the layout of your form, you may wish to preview the form by clicking on the **'Preview'** option. By previewing the form, you will see the form as it will appear to your users.

If you are satisfied with the layout of your form the next step is to make the form available to your users. By clicking on the **'Set Form Live'** button, the form will be added to the Sport Trainer and will become available for use. This will also generate an accompanying database for the Form.

The **'Edit Form Properties'** option allows the administrator to edit the name, description, keywords and the database name for the selected form. Be sure to click **'Finished'** once you have made the necessary modifications.

Tab Index Wizard



The Tab Index Wizard allows the administrator to assign the Tab Order to form items with ease. Clicking on the **'Play'** button starts the wizard. Click on items one at a time in the order you wish them to be numbered. Once you are finished, click **'Stop'** to stop the wizard. Once the Tab Index Wizard has been initiated, clicking on the **'Pause'** and then the **'Play'** button again will allow you to stop the Wizard and resume with the last item selected. By clicking on the **'Rewind'** button, the administrator has the ability to re-order the item selected to its last tab selection number.

Edit

Clicking on the **Edit** link to the right of the Form you wish to edit will open the Form Builder window where you can make any necessary edits. The Form Wizard will open first, if you would like to make any changes you may, otherwise click on the Cancel button. Once in the Form Builder, make desired adjustments and click **'Save'**. Be sure to click on the **'Set Form Live'** option to update the Form on your Web page.

Data

If a Form is a database form, there will be a Data link to the right of the Form name. You can click on this link to view the data from all of the submissions of this Form. To filter the data or create reports we recommend copying the entire Data table into MS Excel and manipulating the Data as desired. To copy the entire data table:

1. place your mouse in the table and press your CTRL + A keys to select all
2. press the CTRL + C keys to copy all
3. open up a new Excel worksheet
4. place your mouse in the first cell and press your CTRL + V keys to paste the copied data

Struct

Clicking on the Struct link will display the database structure for that Form. This option is really only useful for System Administrators.

Copy Form

At times organizations may wish to create multiple forms that contain the same or similar content. As opposed to re-building the form, Web Manager has the ability to copy forms. This is particularly useful if you are building a form in multiple languages.

To copy a form, click on the **Copy** link next to the form you wish to duplicate. An Explorer User Prompt window will appear. In the text field enter a new name for the copied Form and click 'OK'.

Once the form is copied, the Manage Forms window will refresh and the new form will be added to your list of Forms. If this is a Database Form, be sure to enter a new (unique) database name, in Step 3 of the wizard, when you first edit the Form.

Add to Page

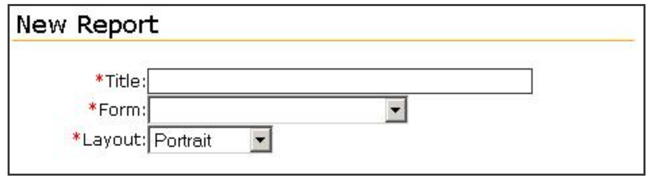
Once you have created a Form you can add it to a page by clicking on the Add to Page link to the right of the Form title. This will take you to the Manage Pages area where you can use the Add Components function to add the Form to a Web page.

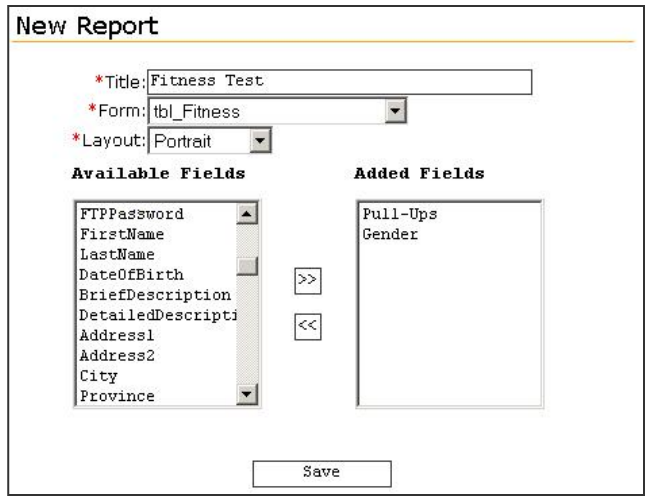
Reports

Search and create reports containing data collected by your organization's Forms. Please note: most organizations find it easier to copy and paste all of the Form data into MS Excel and manipulate the data using the tools available in Excel. Form information on how to do this please refer to the Data section above.

New Reports

1. To create a new report click on the **NEW** button in the Reports area.
2. In the 'New Report' window, fill in the **Title** for the new report.
3. Use the drop-down list to select one of the available Forms. Once you have selected a form, the screen will refresh and a listing of all the available corresponding form fields will appear.
4. Select the fields you wish to search by selecting a field name from the 'Available Fields' box and then use the '>>' button to add it to the 'Added Fields' box. Continue adding as many form fields as you wish.
5. Select the layout for your report: Landscape (horizontal) or Portrait (vertical).
6. Click 'Save' to add your report to the Reports listings.



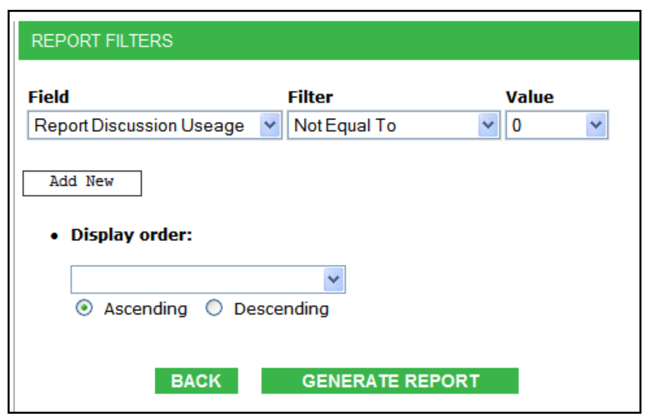


Get Report

Once you have successfully created your new Report, click on the 'Get Report' link to generate that Report. Use the Field, Filter and Value drop-down menus to customize your report filters.

- **Field** – Which area of the form you wish to search
- **Filter** – The specifications of your search.
- **Value** – The value of the information you wish to find.

Use the 'Add New' option if you wish to add additional report filters. Continue adding as many search filters as you wish.



The next step is to set the display order of your data. Use the drop-down menu to select which field will be displayed first. You can also use the option circle to select whether you wish the data to appear in an ascending or descending order. Once you have set your Report settings, click GENERATE REPORT to view the data collected.

Once the report has been generated, if you wish to print the data collected, click on the 'Print Report' option.

Manage Reports

Click on the Manage link to the right of an existing Report name to go to the Edit Report area. You will be able to edit a variety of features including the report form fields and the layout of the report. You also have the ability to edit the Report name. Be sure to click 'Save' once you have made the necessary edits.

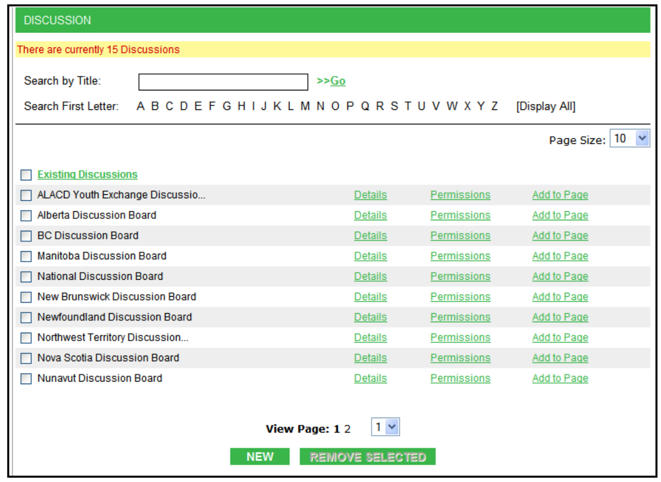
Deleting Reports

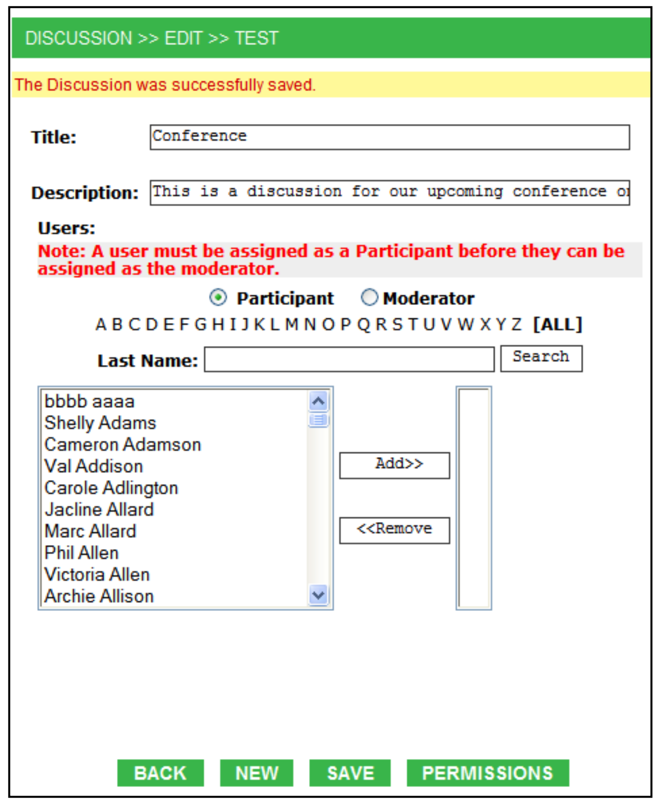
To delete a report(s) click on the checkbox to the left of the report name(s) and then click on the 'Delete Selected' button. When the Microsoft Internet Explorer window appears, click 'OK' to delete the report or click 'Cancel' to end the process.

Discussions

Create a New Discussion

1. To create a new Discussion, click on the 'NEW' button at the bottom of the Discussion area.
2. The screen will refresh to display the 'New Discussion' options.
3. Enter a Title.
4. Enter a description of the Discussion.
5. Click on the 'Save' button to store the new Discussion. The Discussions window will be updated.
6. The next step is to add participants and moderators to the discussion. As a participant, a user can add a new thread, or post a message to an existing thread. A moderator has the same functionality as a participant, however in addition he or she can also remove any threads and messages from the Discussion.
   - The 'Users' section is managed in two modes: Participant and Moderator. By default the 'Participant' option is selected. The '**Participant**' screen lists all users of the system in the left select box. Search and then select the user(s) you wish to add as a discussion participant. Once selected (highlighted in blue), click on the 'Add' button to add the user to the right select box (participants of the discussion).
   - To add a **moderator**(s) to the discussion. Click in the button next to the 'Moderator' heading to display a list of potential moderators. The screen will automatically refresh to display a list of prospective moderators in the left select box (current moderators will appear in the right select box).
   - Add a moderator(s) to the discussion by selecting a participant(s) from the left select box and then click on the 'Add' arrow to add the participant as a discussion moderator.
   - To remove a participant or moderator from a discussion, select either the Participant or Moderator button and select the user from the right select box and click the 'Remove' button to remove the user from the list of current participants/moderators.
7. Click **'SAVE'** to update your changes.

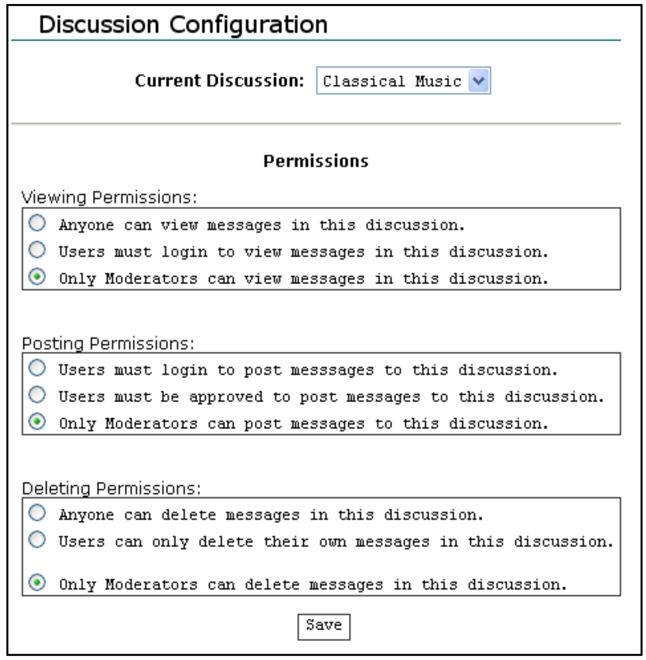




Note: The list of potential moderators (left select box) is generated based on the list of assigned discussion participants. Therefore, in order for a user to be listed as a potential moderator they must first be added to the discussion as a participant.

Permissions

Allows you to assign viewing, posting and deleting permissions for the discussion selected.



Click on 'Permission' to the right of the Discussion you would like to manage. Customize your Viewing, Posting and Deleting Permissions and click '**Save**'. In the screen shot above, the Classical Music Discussion Forum has the following permissions: only moderators can view, post and delete messages.

Delete a Discussion

In the main Discussion screen click on the checkbox to the left of the Discussion you would like to delete. Then click on the REMOVE SELECTED button. A window will appear, prompting if you would like to remove the Discussion and any associated data, click 'OK' to delete the discussion or click 'Cancel' to end the process.

Accessibility

Hot Keys

Hot Keys facilitate easy page navigation via a single keystroke.

Adding Hot Keys

Select the Accessibility category from the main menu and then select the Hot Keys Sub-Menu option. Add a Hot Key into the Key field, a title in the Title field and then use the link 'Click here to chose a page' to select the desired Web page. Click 'New' each time you wish to add an additional Hot Key or click 'Save' to store the addition.

Customize the Hot Keys order by selecting the option box next to the desired Hot Key and clicking on the 'Up' and 'Down' arrow to move the Hot Key entry accordingly.

NOTE

Note: If your organization has a multi-lingual site, the first time you save your Hot Key entries a corresponding list of Hot Keys will be generated for all applicable languages. However, this will only occur the first time that you save your Hot Keys list. In addition, page titles will be transferred as the title entered in the English Hot Key Page, therefore you may wish to edit the title to correspond with the language the user selects.

Removing Hot Keys

To remove a Hot Key entry, select the option box next to the desired Hot Key. When selected, the 'Clear Selected' option will become enabled. Select 'Clear Selected'. When the prompt appears, click 'OK' to continue with the removal or click 'Cancel' to end the process.

VIRTUAL OFFICE

The Virtual Office is a powerful online collaboration tool that allows distributed groups of people who share a common concern, set of problems, mandate or sense of purpose to communicate and share information over the Internet.

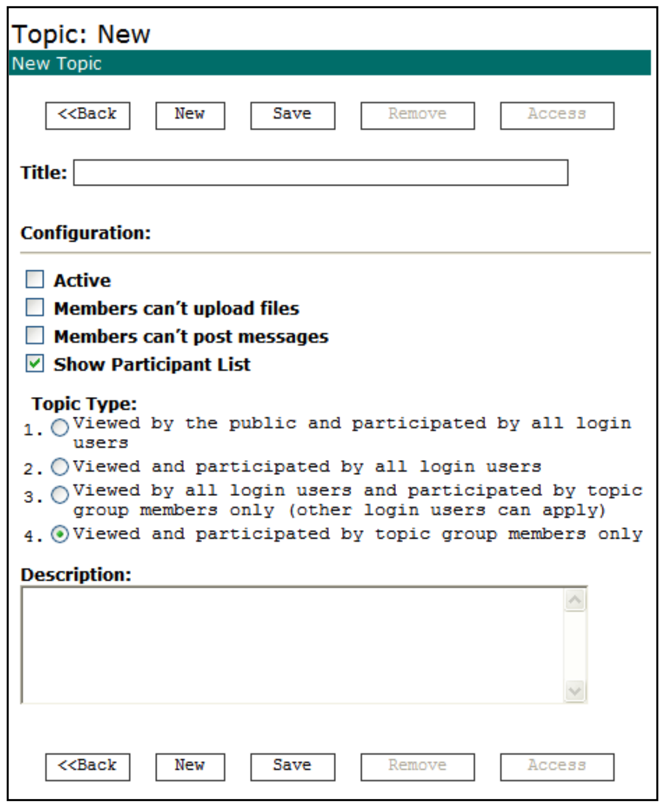
Note: Not all Web sites have the Virtual Office application enabled. If you would like to add the Virtual Office to your Web presence please contact your Nortia Representative.

Topics

The Virtual Office manager allows you to create an unlimited number of Topics (Offices) and an unlimited number of users. A user can be assigned to more than one Topic; and can have different Access privileges within each Topic.

Add a Topic

To create a new Topic, click on 'Topics' below the Virtual Office category in the Menu. In the 'Topics: Search' window, click on the **New** button near the bottom of the screen. In the 'Topic: New' window (see to the right), type in the name of the topic in the **Title** field.



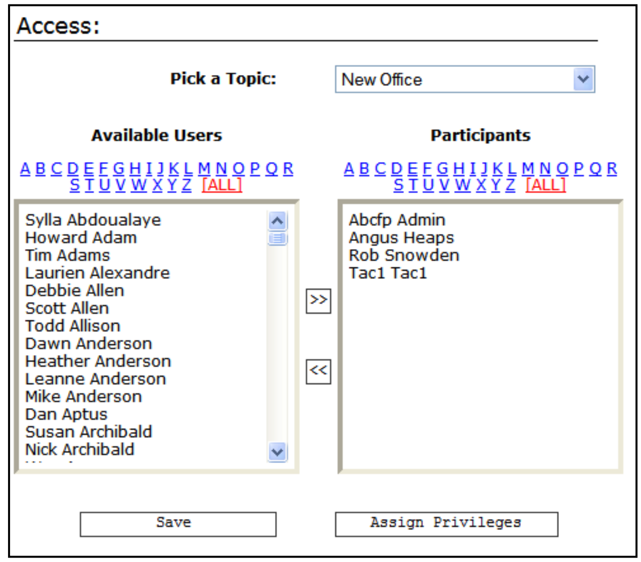
Set the Topic Configuration:
Choose if the Topic is Active or not. If a Topic is not Active **ALL** members will not be able to see/access the Topic through the user area
Choose if Members will be able to upload files or not. If you choose that Members can't upload files that means **ALL** members will not be able to upload files. Only Administrators will be able to share files in the Topic.
If you choose Members can't post messages than only the Topic Leader will be able to post messages in the Discussion area. All other Topic Members will only be able to read posted messages.
If you decide that you do not what Topic Members to be able to see other Members profiles be sure to uncheck the Show Participant List option.

Adding a Description to a Topic is optional.

Click on the **Save** button to create the new Topic (Office).

Once you have created your new Topic (Office), the next step is to add members to the topic. Once your new topic is successfully saved, the screen will refresh to display the 'Topic: Edit' window for the newly created topic. The **Access** button will become enabled, click on this to add users to the topic. Or, use the Access sub-option in the Virtual Office category from the Menu.

In the 'Virtual Office: Access' window (seen to the right), the drop-down menu next to the 'Pick a Topic' title will display the currently selected topic. If you wish to select another topic, use the drop-down menu to select the desired Topic.



From the 'Available Users' box, select the user you wish to add and click on the right arrow to add them to the 'Participants' box. To add multiple users at once, hold down the 'CTRL' key and select the users you wish to add, and then click on the right arrow. Use the alphabetized list or the 'All' button to search for specific Users.

Once users have been added to your 'Participants' box, click on the **Save** button or to setup Participant access privileges click on the **Assign Privileges** button.

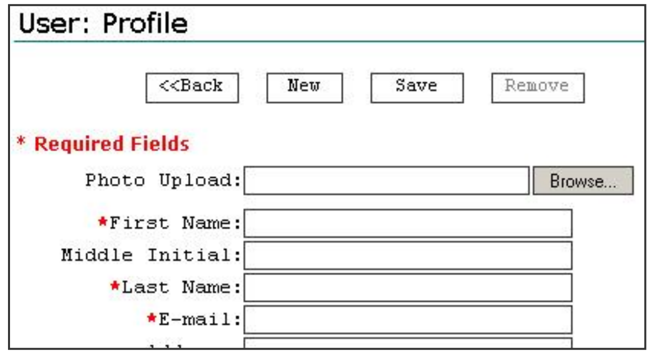
Each Topic Participant can have one of four Access Levels, and each Topic can have only one Leader.
Participant (**P**)- Can post messages and delete their own messages. Can add links and files.
Leaders (**L**) – Leaders have full control to a Topic. They can post messages, delete any message, and add and remove links and files. Leaders can also approve users who have applied to a topic.
Observers (**O**) – Observers can post messages and delete their own messages. Can add links and files. Observers do not appear in the participant lists.
Topic Authors (**A**) – Topic Authors are Participants who can also edit the Topic Overview Areas.

Once finished, click on the **Save** button to save the Access Privileges settings; or click on the Back button to return to the 'Virtual Office: Access' page without saving.

Users

Adding a User

In order for a user to have access to a Topic (Office), they must first have a User Profile entered into the system. To enter a user into the system, click on the **Users** sub-option located with the Virtual Office Menu area. All of the systems current users will be listed. Click on the **New** button located at the bottom of the window. Fill in the required fields with the appropriate information and click ‘Save’. Be sure to note the user name and password to forward onto the new User.



Click on the New button to create another New User or to return to the ‘User: Search’ screen, click on the Back button.

Editing a User

Click on the **Users** sub-option located with the Virtual Office Menu area. To find a specific User select a letter from the Alphabetical Index to display a list of all users whose last name starts with that letter; or enter all or just the first few letters of the User’s Last Name into the Last Name search field. Once you have found the desired User click on their name and the User’s profile will open. Make any necessary changes and click ‘Save’ to store the additions.

> NOTE **Note:** Be cautious of editing a user’s login name and password without the user’s approval because once you have made the change, the user will no longer have access to the system.

Removing a User

There are two methods utilized to remove a user from the system. Option 1 - while within the ‘Users: Search’ page (click on the ‘Users’ option from the main tool bar), select the option box next to the desired user and click on the ‘Remove Selected’ button. Option 2 - click on the user’s name to display the user profile. In the ‘User: Profile’ page, click on ‘Remove’ to delete this user from the system. Click on ‘OK’ to continue with the removal or click ‘Cancel’ to end the procedure.

> NOTE **Note:** Removing a user using either of the methods noted above will delete the user from the system. If you wish to remove a user from a select Topic without removing their account from the system, you must edit the Topic Access level by selecting ‘Access’ and removing the User from the specific Topic.

Access

At any time, as an Administrator you can customize the Access level of all Topic Participants. To edit Topic Participants or to reassign Access levels, select the **Access** sub-option from the Virtual Office Menu option. Use the drop-down menu to find the desired Topic. The screen will automatically refresh to display a list of Topic Participants. Make any necessary changes (add and remove participants, edit privileges etc.) and click 'Save'. For more information about Access and Privileges please refer to the Topic section above.

Approval

Restricted users may wish to apply for access to Type 3 Topics. Type 3 topics appear in the list of available Topics, but a user cannot participate in these topics unless they are granted permission. If a user requests access to a certain topic, you can grant them access to the Topic here.

Approving Users

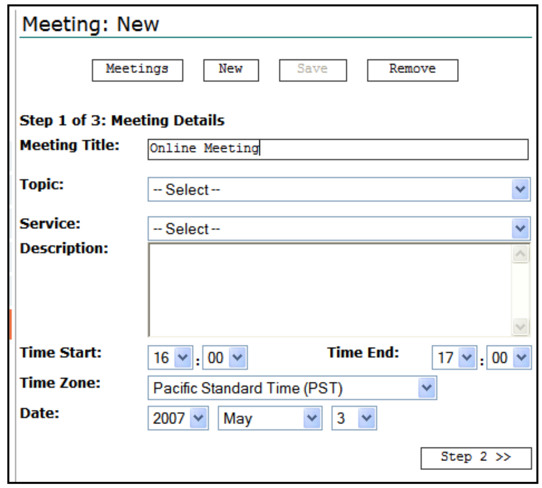
Enter the Approval page, by clicking on the **Approval** sub-option in the Virtual Office Menu area. A listing of all users who wish to access a specific topic will appear. Click on the specific topic name to view a complete list of all users who have requested access. Select users by checking the box to the left of the user name. The 'Approve Selected' and 'Reject Selected' options will become enabled. Click on the appropriate option to approve or reject a user's request.

Meetings

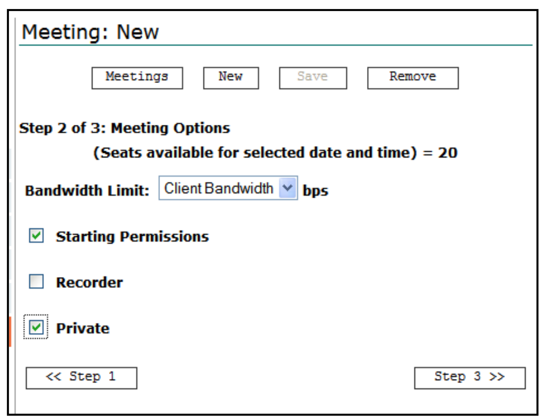
Although Topic Leaders are able to schedule Online Meetings within their Topic(s), Administrators can schedule meetings within any Topic through the Meetings sub-option listed within the Virtual Office Menu item. Setting up meetings involves a three-step process. Step 1 sets up the meeting time, date and gives the meeting an identity. Step 2 involves setting up meeting options such as the bandwidth and privacy settings. Step 3 involves selecting members to participate and moderate the meeting.

Select the **Meeting** sub-option from below the Virtual Office Category in the Main Menu. A list of existing meetings will appear.

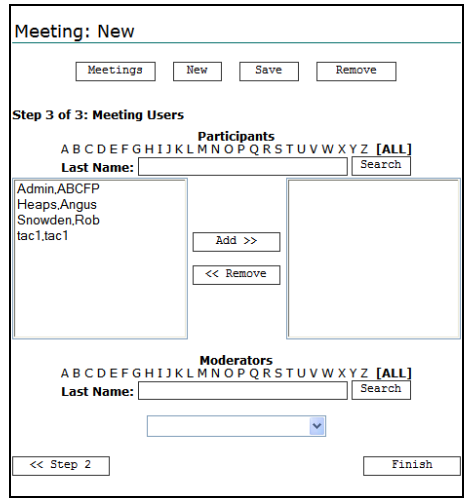
To create a new meeting, click on the **New** button. The screen will refresh and Step 1 will appear (as seen to the right).



- **Step 1** - enter the Meeting Title, the Topic that this meeting will be scheduled for, select the service you would like to use (please note some organizations will only have one option for Service), enter a Description, time information, and date of the meeting.



- **Step 2**, you will be asked to enter options of the meeting. There are four settings on this page.
  - **Bandwidth Limit** - A drop-down menu with various bandwidth is provided to help control the connection speed of the meeting. By default, the bandwidth is set to Client Bandwidth.
  - **Starting Permission** – Select this item if you would like the meeting to start without the moderator's presence. If the moderator's presence is required to start the meeting, leave this box unchecked.
  - **Recorder** – Check this box if you would like the capability to record meeting.
  - **Private** – Check this box if the meeting is Private and Confidential. If checked, access to this meeting is limited to individuals selected in step 3. If unchecked, the meeting is available to the public (i.e. all users of your organization's Virtual Office area) and only the moderator is chosen.
- **Step 3**, you will be required to choose the moderator, or the moderator and participants depending on your Private settings in Step 2.
  - **If 'Private' was checked** – you will be required to select the Meeting participants and the moderators from the list of Topic Participants. Under the Participants heading, there are two lists available. The list to the left is the list of all available participants in your Virtual Office Area. The list on the right (which starts out empty) is the list of all participants in this private meeting. Use the "Add >>" arrow to move available participants to the meeting list on the right. Use the "<< Remove" button to remove



participants from the meeting. Now, select the moderator of the meeting by selecting the name of the individual in the drop-down menu under the Moderator heading located below the Participant area. Please note that the moderator is selected from the list of participants of the meeting. This means that to be a moderator, the individual has to be a participant whose name appears on the meeting list (on the right) of the participant area. Now click on 'Finish' to save the meeting settings.

- **If 'Private' is unchecked** – If the privacy setting is unselected, then this step chooses only the moderator since the meeting is public and is available to all user in your Virtual Office area. First, enter the maximum meeting capacity in the 'Enter Public Seats Needed:' field. Next, select a moderator from the drop-down menu. The list in the drop-down menu is made up of all users in your Virtual Office area. Now click on 'Finish' to save the meeting settings.

Appendix A

The Content Editor has been designed to resemble the look and feel of common word processing applications, so that you can edit the content by using familiar WYSIWYG tools.

Note: for those users with HTML experience, you can build your content in HTML by clicking on the Source check box in the top left corner.

To accept the changes in HTML or Word editor, click on ‘Submit Data’. If you click ‘Cancel’ or you exit this window without clicking ‘Submit Data’ all you changes you have made in this window will not be saved.

Content Editor Tips

Lets take a look at some of the functionality of the Content Editor. We will take a look at each of the tools in the menu bar, starting in the top left and working our way across each row.

Cut (Ctrl + X)

If you would like to remove a piece of text or a graphic – select that piece of content and then click on the Cut icon.

Copy (Ctrl + C)

If you would like to copy text or graphic select that piece of content click on the Copy icon – move the cursor to where you would like to Copy the Content and then click the paste icon:

Paste (Ctrl + V)

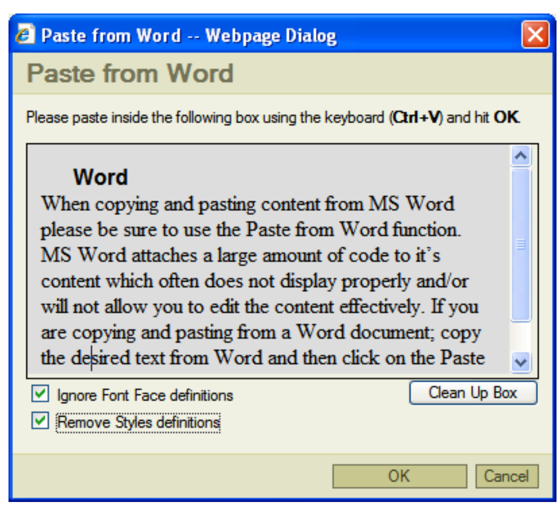
Once you have copied a piece of text (from within the Content Editor or from another document or email) move your cursor to where you would like to insert the text you have copied and click on the Paste icon.

Paste as Plain Text

If you have copied the text that has a different format (colour, font, size) than you would like to use, click on the Paste as Plain Text to only copy the text without any formatting. This function can also be used to copy content from existing Web pages.

Paste from Word

When copying and pasting content from MS Word please be sure to use the Paste from Word function. MS Word attaches a large amount of code to it’s content which often does not display properly and/or will not allow you to edit the content effectively. If you are copying and pasting from a Word document, **copy** the desired text from Word and then click on the Paste From Word icon. This will open the **Paste from Word** window as seen to the right. **Paste** the content into the large box. Be sure that both of the check boxes near the bottom right corner are checked. Click on the **OK** button. The Paste from Word window will close and the content will be ‘cleaned’ and pasted into the Content Editor.



Find (Ctrl + F)

If you would like to find a specific word or phrase, click on the Find icon. A small pop-up window will open in which you can enter the word or phrase to search for in the current document.

Undo

If you have made a change that you to not want to keep click on the undo button to revert back to the way the content was before performing your last function.

Redo

Works in the opposite manner as the Undo button.

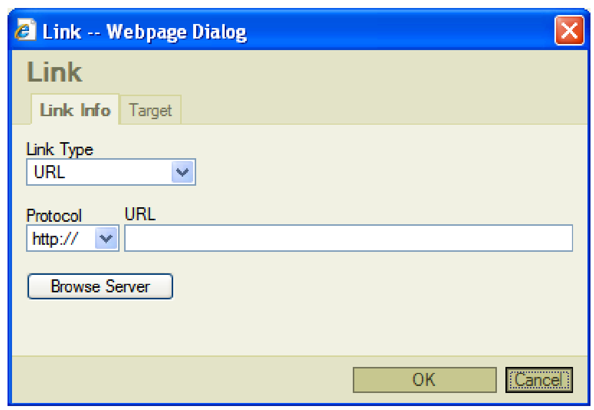
Select All (Ctrl + A)

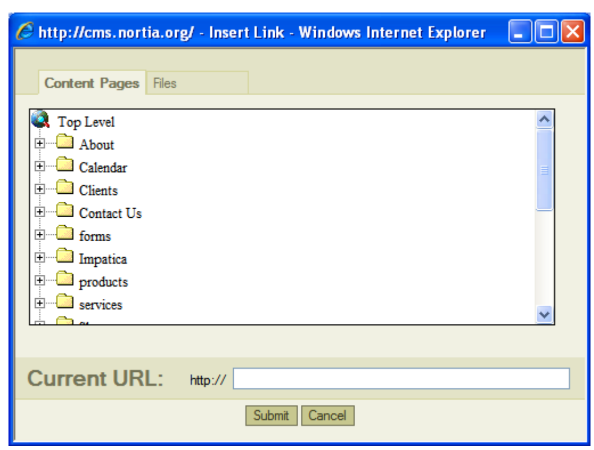
To select all of the content in the entire document including graphics, tables, etc click on the Select All button.

Remove Format

To remove the colour, font type, size, etc from a piece of text, select the desired text and then click on the Remove Format button.

Add Hyperlink





If you would like to link a section of text or a graphic to a Web page, file, or email address:

1. Select the text or graphic you would like and then click on the Add Hyperlink button. The Link Web Page Dialog box will open.
2. Select the Link Type from the drop-down list. The option available are:
   i. **URL** – used when linking to Web pages or files (PDFs, images, etc.) When linking to a page or file you can enter the URL in the URL field. If you are linking to a page or file on your Web site you can find the URL by clicking on the **Browse Server** button. This will open the Insert Link window. When this window first opens you will see a list of all of the pages on your site – a very similar view to the Manage Pages section in the Administration Console. Find and select the **page** you would like to link to and click on the Submit button. The Insert Link window will disappear and you will be returned to the Link window. You may also link to a file you have already uploaded to your organization's folder. To link to a file, click on Files tab at the top of the Insert Link window – the window will refresh and show you the File Management area were you can located and select the file you would like to link to. Click on the file and then click on the 'Submit' button. Note: if you are linking to an external Web site

or file be sure to link on the Target tab in the Link Webpage Dialog box. Select New Window (_blank) from the drop-down list. This means that the link will open in a new window while your site will remain open in the background. Click OK.

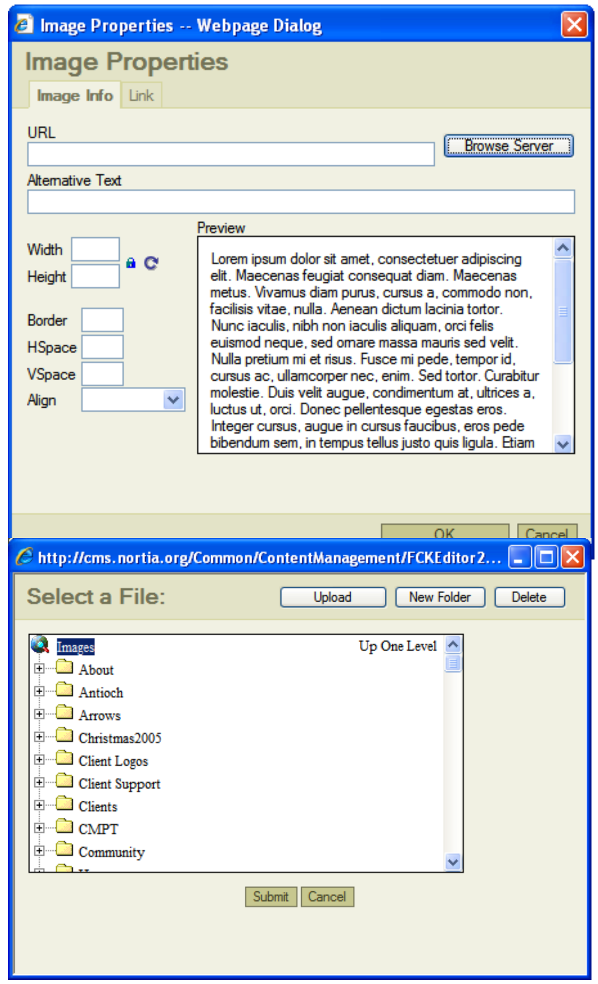
ii. **Anchor on this page** (note you will have to create the anchors first for options to appear)

iii. **Email** – used when linking an email address. When you select this option you can enter the E-mail Address (or Addresses – separated by ';') that you would like the email to be sent to. You can also enter the Message Subject and Message Body which will automatically be enter into the user Email when their email client (Outlook, Outlook Express, etc.) opens.

Remove Hyperlink

If you would like to remove a Hyperlink from text or a graphic, select the content you wish to remove the hyperlink from and then click on the Remove Hyperlink button.

Insert Picture



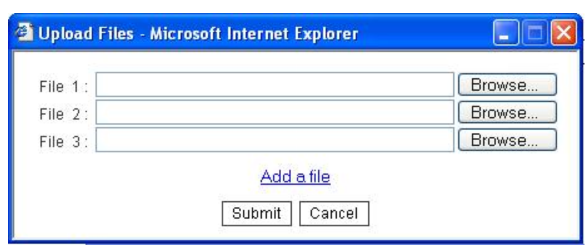
Click on the Insert picture button to add a photo or other graphic to your content. Clicking on the Insert Picture button will open the Image Properties window as seen to the right.

Tip: All pictures you use on your Web site should be "optimized for the Web". This option is available in most photo-editing applications. You should make all pictures as small as possible (dimension and file size) to minimize the time it will take for the Webpage to load.

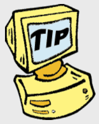
To select an image that has already been uploaded to the Web site server, or to upload a new image click on **Browse Server**. This will open the Select a File window.

To use an existing photo click on its name, or open the Folder in which it is stored and then click on the desired file. Then click on the 'Submit' button. You will be returned to the previous window.

To upload a new image, click on the **Upload** button in the Select a File window. This will open another window. You can choose an existing folder to upload your image into or you can create a 'New Folder'.



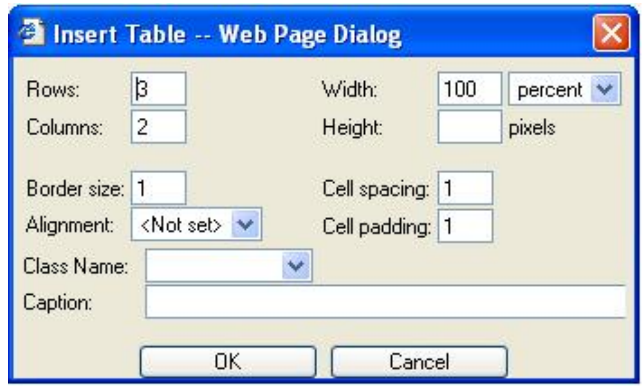
To upload a picture click on the 'Browse' button, you will be able to browse your computer or network computers to find the file (image) you would like to use. Select the file you would like to upload and then click on the 'Open' button. You can upload up to 10 files at a time. By default only three file fields are displayed to add more click on the Add a file link. Once all the files have been uploaded, click on the 'Submit' button. You will be returned to the **Select a File** window. Select the desired and click on 'Submit'. Now adjust the size, padding, border, and alignment of the picture and click on 'OK'.



Tip: Once you have added an image to a page you can modify its properties by right clicking on the image in the Content Editor and selecting Image Properties from the option window that appears.

Insert Table

You can insert a table by clicking on the Insert Table button. Using a table will often help with formatting difficulties when using pictures or other images. You can see in the example to the right that a table was created with four columns. Pictures were then inserted into the first and third columns; and then text was typed into the second and fourth columns.

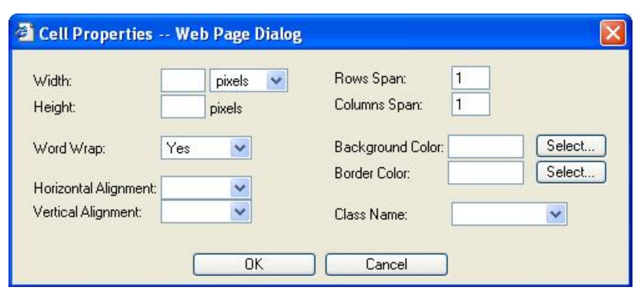


When creating a Table you can set the following properties:

- Number of Rows and Columns
- Border Size ('0' = no border)
- Alignment on the page
- Width (If you would like the table to span the entire width of the content area set the width to 100 percent)
- Height (The table height will grow with the content it contains, so it is recommended that this field be left blank)
- Cell Spacing (This is the distance between cells)
- Cell Padding (This is the distance between the edge of the cell and content it contains)
- Class Name (use a preset a table style)
- Caption (you can enter text that will appear when the user moves there mouse over top of the picture)

Once you have Inserted a Table onto a content page you can modify it's properties by moving your mouse to one side of the table, your cursor will change to a four-way arrow, right click and select Table Properties from the option list that appears.

To change the size and formatting for individual cells, move the cursor into that cell and then right click and choose **Cell Properties** from the option list. You can then change a number of properties as seen in the Cell Properties window to the right.



Once option that is frequently used, is the background colour.

 Insert Horizontal Line

To break up you content move your mouse to the start/end of a paragraph and click on the Insert Horizontal Line button. A dark grey line will be inserted that spans the width of the content area.

 Insert Special Character

To insert a character that is not found on the typical English keyboard click on this icon to select from a list of Special Characters.

 Bold

If you would like to make a word or phrase Bold, select the desired text and click on the Bold button.

 Italics

If you would like to make a word or phrase Italics, select the desired text and click on the Italics button.

 Underline

If you would like to underline a word or phrase, select the desired text and click on the Underline button.

 Strike Through

You can add the strike through line to text by selecting the desired text and clicking on the Strike Through button.

 Subscript

If you would like to change the format of a character to Subscript select that character and then click on the Subscript button. (For example, the ‘2’ in $H_2 0$)

 Superscript

If you would like to change the format of a character to Superscript select that character and then click on the Superscript button. (For example, the ‘2’ in m^2)

 Alignment Buttons

You can change the alignment of a section of text by selecting that text and then clicking on one of the four alignment buttons: align left, centre align, align right, and justify left and right.

 Numbered List

You can place items in a numbered list by clicking on this button. To end a list click on the Enter button twice.

 Bulleted Points

You can make a bulleted points list by clicking on this button. To end a list click on the Enter button twice.

 Tab Left

To move a section of text one tab space to the left, highlight the desired text and click on the Tab Left button.

Tab Right

To move a section of text one tab space to the right, highlight the desired text and click on the Tab Right button.

Show Borders

If you have added a table with no borders to your content error you can display the borders, to help you with your editing, by clicking on the Show Borders button.

Show Details

To show the Details (paragraph start points, etc) click on this button.

Style

Similar to MS Word there are a number of Styles that can be applied to any of the text on your site. However, unlike MS Word the styles have all be custom created for your site and **should be used for all text on your site**. The help to keep your site looking consistent and professional no matter whom is administering it. If you would like a Style changed please let your Customer Support Representation know. Also, by using styles it is very easy to quickly update the 'look' of your site. For example: if you would like to change all of the links from a red underlined font to a **blue bold font** it can be done quickly by your Customer Support Representative and will instantly be applied to all text using that Style; a lot more efficient than you having to go through your entire site to change a font Style.

The **Format, Font,** and **Size** drop-down lists all refer to text properties. Select the section of text you would like to change and then select the desired property from the appropriate drop-down list.

Text Colour

If you would like to change the colour of your text, select the desired text and click on the Text Colour button. You will then be able to select a colour from the colour palette.

Background Colour

This button can be used to change the Background colour of a section of text or for the cell in a table.