ACTIVE Content Manager
Administration Guide

Version 22.2
September 19, 2022

Table of Contents

ACTIVE Content Manager

ACTIVE Content Manager (ACM) provides an easy-to-use interface that allows you, the person who understands your business the best, to communicate directly to your customers, partners, vendors and colleagues by enabling you to input content to your website directly. If you can surf the web and type an email, you can use ACM to help you input, control and publish your information.

Technical Support

Technical support is available through the online support center at:

- customerportal.ACTIVEnetwork.com

In order to use this site, you must have a valid user name and password. If you're unsure, please try the **Forgot Password** link to check for an existing user name.

Support email: ACMSupport@ACTIVEnetwork.com

Important ACM Concepts

This section introduces key concepts to understanding how to use the ACTIVE Content Manager to create and manage your sites. Review these concepts from time to time; doing so will improve your understanding and ability to work with ACM.

Admin Center

The Admin Center is where sites are created, maintained and monitored. Features within the Admin Center are available to users based on their Group settings. System Administrators have full access to the Admin Center.

How pages look and function

The published pages on your website appear as they do because of two main components:

- a Page Type that controls the functionality of the page
- a Page Template that controls the formatting of the page

Page Types

Different formatting and functionality will appear in the content area of each page type you select when creating content. For example, when you create a Syndicated Calendar page, the page automatically includes a pre-programmed, functional calendar complete with a date picker and day, week, or month formats.

Each Page Type uses a style sheet located in the design package (pagetypes.css) that is fully editable.

Templates

Templates contain layout, design and formatting information that determines how your finished pages look. Templates control both the outer regions of your web pages, defining how the header, footer, navigation panes and other aspects of your site will look, as well as the central content area of each page.

By using templates to control site formatting, ACM keeps design and content separate. This means that users focus on entering content, while templates control how that content will look. If a change to the site's look and feel is required, the template can be updated, and the content will automatically conform to the new template design.

The Finished Page

The final published web page is a combination of the template, the page type and the content you enter.
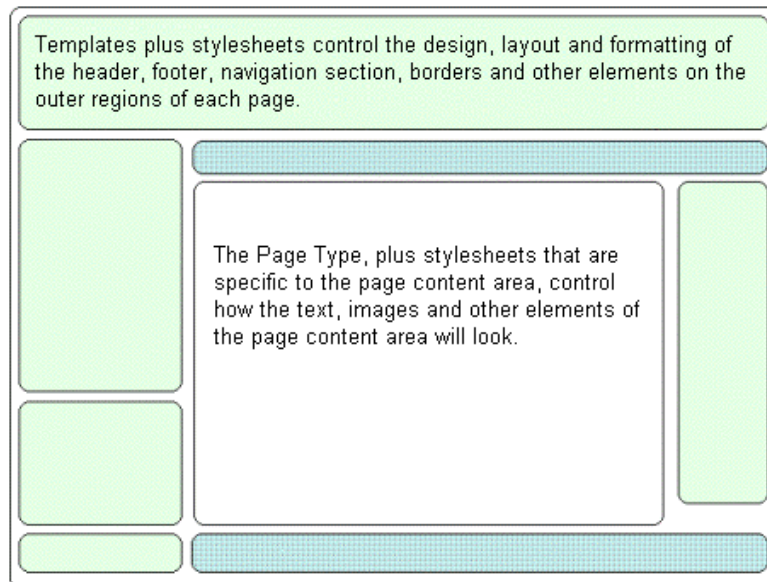
System Editors

There are three different editors used extensively throughout ACM. The type of editor you use depends on the type of information you are editing.

Content Editor (Quick Edit mode)

The Content Editor allows you to create and edit page content. The editor consists of a work area and a standard set of toolbar buttons. The Content Editor can be used in Quick Edit mode, or as part of the Page Editor that allows you to work in Full Edit mode.

Page Editor (Full Edit mode)

The Page Editor is the full-featured page-editing tool that allows you to not only edit the content of a page or pagelet in the Content Editor window, but also allows you to perform additional page management tasks.

Read Only Editor

The Read Only Editor is used throughout the ACM system when the status of a page is such that it should not be presented in an editable view. When a page is Pending Review and Pending Publication, buttons will be available to perform the actions to move the page through workflow.

Question Editor

The Question Editor is used for creating questions and data collection fields that are used on Application Forms and Surveys. The Question Editor is also used for creating Meta Data and User Profile questions.

Image Editor

The image editor can be used to perform simple editing of digital asset images. Resizing, cropping and flipping/rotating are available in the editor and images can be saved with changes or saved as a new asset, preserving the format of the original. Only images smaller than 2880 x 2880 pixels are supported in the image editor.

Edit Locking

When Edit Locking is enabled as either a global or site setting, users will not be able to edit any content or settings of a page while another user is doing so.

The Full Edit and Quick Edit Mode buttons are disabled when a user is editing the page. When a page is being edited by one user, all subsequent users will see a message beside the Full edit button stating that the page is "Locked for Editing".

Child pages can still be added from view mode to any parent page locked for editing.

Pagelets that reside on a page locked for editing can be edited by another user.

A page remains for as long as the editing user's session remains active. Publishing a page, submitting a page to workflow, closing the browser window or navigating away from edit mode will remove the edit lock and allow others to make changes.

When a page is locked for editing, the ability to change workflow and page design settings are also locked. A Page Editing Status Report is available in the System Information section of the Admin Center. For more information, see Appendix M – Edit Lock.

Parent/Child Page Relationship

The parent/child concept is central to understanding how websites are built using ACM.

A parent page is any page within your website that has pages below it in the website hierarchy. In order to create child pages, you edit a page and add a new page using the Child Pages tab. Once you have added one child page, you can continue to add child pages, creating a hierarchy as shown below.
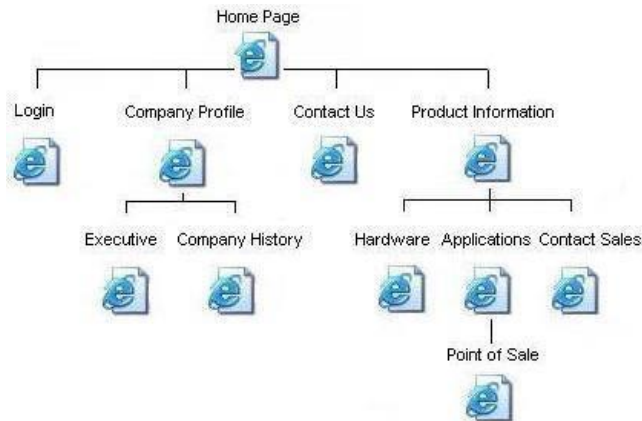
A website structure should be planned prior to creating the parent/child page structure in ACM.

Dynamic and Static (Exported) Sites

Dynamic Sites

A dynamic site is one where the content and the system used to create the content are in the same location and integrated. When content changes are published, they are immediately visible on your site. If this is the site you make available to your public, they too will see the changes immediately.

This is different from the static (exported) site that requires the additional step of exporting the site to the static location.

Static Sites

When a site is exported, the system converts all pages to HTML files located in a folder within the ACM installation. When users access the site, they are accessing the static HTML files rather than your dynamic site.

This in effect unhooks most of the site content from ACM and duplicates your site content. The site resulting from the export is referred to as the static site. In order to indicate that you want to export a site, your System Administrator must configure the site export information on the Publication tab of the Site Manager.

For more information, see [Appendix A – Static Sites](#).

Multiple Sites in a Single ACM Installation

If you are creating multiple sites within a single installation of ACM, we recommend that you decide whether you will export all of the sites or none of the sites. It is not advisable to maintain some sites as dynamic and others as static within the same installation, as this can cause errors in the link conversion process and result in incorrect page linking.

User Roles

ACM comes with a default set of suggested user roles that are configured in the Group Manager. System Administrators can customize these roles to suit the needs of each site.

For more information, see Appendix B – Group Types.

Workflow

Workflow encompasses a number of processes in ACM:

- Workflow Groups are created and applied to Workflow processes that are assigned to pages. This dictates who has rights to edit, monitor and approve a page.
- Follow-up Tasks which are set on the Workflow tab in full-edit mode. These tasks are: Archive, Inactive, Review or None. For more information, see Appendix C – Follow-up Tasks and Workflow.
- "Workflow" is the state a page is in perpetually once created. At any time a page will be in one of any number of workflow statuses. For more information, see Appendix D – Page Versions.

Links

There are a number of ways to create links within ACM. The method you choose for creating a link depends on the types of links you want to group together and where on your page, or site you wish to place them. For more information, see Appendix E - Links.
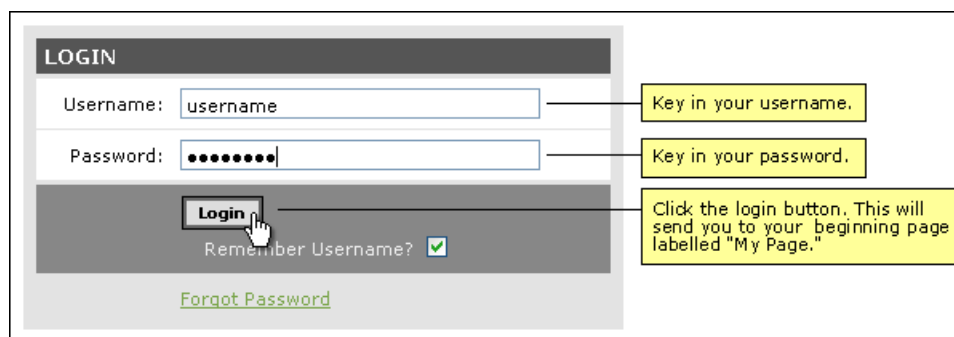
Getting Started

Logging on to ACM

Open a Web browser and go to the login page for your site.
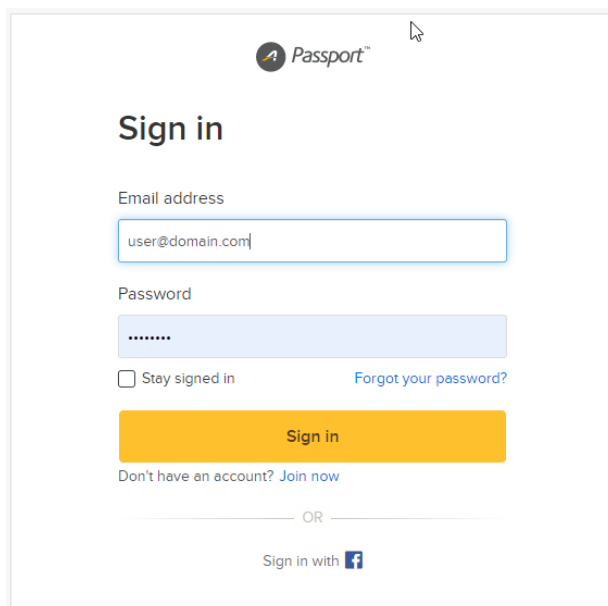
Site URL = _____.

Users that use ACM login should now see the login page.

Users that use ACTIVE Passport should now see the Passport sign-in page.
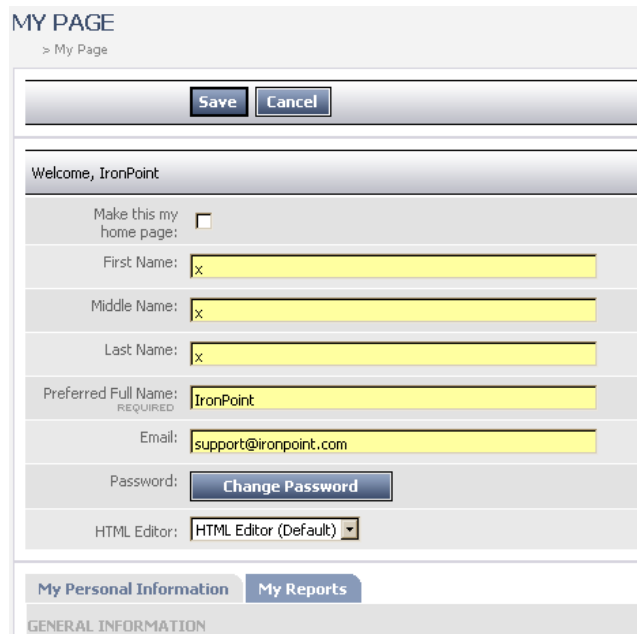
Enter your username and password.

The first time you log in you will see your personal information page called My Page. On My Page, you can view your personal information and rights and if you use ACM login, you can change your password.

You should never change your password in ACM if you are using LDAP authentication for your user accounts.

If you don't want to see this page every time you log in to ACM, uncheck the "Make this my home page" checkbox. Click Save. The next time you log on, you will be directed to your site's Home Page instead of to My Page.

Changing Your Password

If you use Passport to sign in, you can change your password by clicking **Forgot your password?** and following the steps in Passport.

To change your password as a user that uses ACM login:

1. On My Page, click Change Password.
2. In the **Old Password** field, enter in your current password.
3. In the **New Password** field, enter a new password.
4. In the **Retype New Password** field, enter the password again.
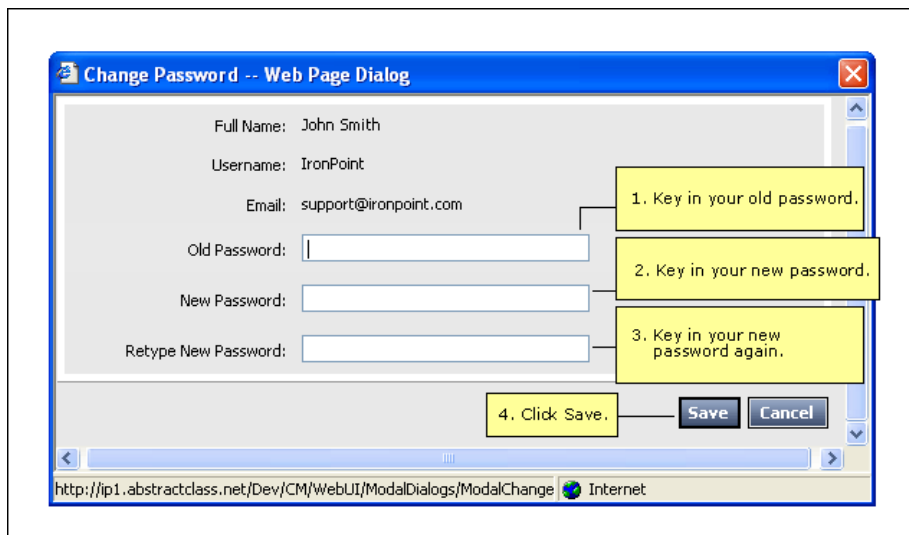
5. Click **Save**.
6. When you are back on **My Page**, click Save again.
7. Click **Logout** and log back in again using your new password.

Changing Your Editor Preference

By default, the system will provide you with the Telerik RadAjax WYSIWYG editor. If you prefer not to use this editor and work directly with HTML code, you can change the option by selecting "Plain Text" in the HTML Editor drop-down. Additionally, the TinyMCE WYSIWYG editor has been added as an option.

> **Note** The TinyMCE Editor will always insert the <p> paragraph tag when a user hits the Enter key. If you prefer to use a <br> tag instead of <p> for paragraph breaks, you can simply hit Shift+Enter in the TinyMCE editor.

The non-WYSIWYG editor includes the following buttons: Insert Digital Asset, Insert Link, Copy to Clipboard, and Paste from Clipboard.

Insert Digital Asset

This button provides the ability to directly insert a digital asset into the plain text editor, providing the same functionality as the WYSIWYG editor.

Insert Link

This button provides the ability to directly insert a page link (internal, external, or anchor) into the plain text editor, providing the same functionality as the WYSIWYG editor.

Copy to Clipboard

This button provides the ability to copy the text in the plain text editor to the system clipboard.

The system will correctly copy digital asset and internal page links to the system clipboard (for the primary purpose of correctly pasting them into Dreamweaver.)

If the ability to copy text to the clipboard is not exposed by a browser, the system will provide easy access to the tag as text (for the primary purpose of be manually copying and pasting into Dreamweaver.)

Paste from Clipboard

This button provides the ability to paste the text into the plain text editor from the system clipboard.

If the ability to paste text from the clipboard is not exposed by a browser, the system will provide a location where the text can be pasted.

Pasted text will not be altered by the system when pasted into the plain text editor.

My Reports

A set of MyPage reports have been provided in order to help System Administrators have increased visibility into the system and help identify pages which need attention by displaying the status of pages that users are in some way responsible for. Pagelets are included in the reports, exactly as all other pages in the system are.

If you as the System Administrator also play other roles on the site, you may utilize the following Content reports.

My Page Rights

Displays your rights within the ACM system and what groups you obtain those rights from.

My Personalized Pages

To identify pages that the user has rights to view. This report will identify the page title, site, hyperlink to view mode, and location line of each page in the report.

My Draft Pages

To identify pages for Content Providers, the report includes the page title, site, last modified date time, hyperlink to edit mode, and location line of each page in the report.

My Pages Pending Approval

To identify pages for Content Providers, the report includes the page title, site, page status, hyperlink to edit mode, and location line of each page in the report.

Pages Pending My Approval

To identify pages for Approvers, the report will identify the page title, site, page status, hyperlink to edit mode, and location line of each page in the report.

My Pages Pending Translation

If translation is enabled, to identify pages for Content Providers, the report will identify the page title, site, page status, and location line of each page in the report.

My Pages Pending Review

To identify pages for Content Providers, the report includes the page title, site, page status, review date, hyperlink to edit mode, and location line of each page in the report.

My Pages Scheduled for Archiving

To identify pages for Content Provider, the report includes the page title, site, page status, archive date, hyperlink to edit mode, and location line of each page in the report.

A set of reports are available for System Administrators to identify certain statuses of pages in the system.

All Personalized Pages

To identify all personalized pages in the system. This report will identify the page title, site, hyperlink to view mode, and location line of each page in the report.

All Draft Pages

To identify all pages in the system in draft mode. This report will identify the page title, site, last modified date time, hyperlink to edit mode, and location line of each page in the report.

All Pages Pending Approval

To identify all pages in the system pending approval. This report will identify the page title, site, page status, hyperlink to edit mode, and location line of each page in the report.

All Pages Pending Translation

If translation is enabled. To identify all pages in the system requiring translation. This report will identify the page title, site, page status, and location line of each page in the report.

All Pages Pending Review

To identify all pages in the system pending review. This report will identify the page title, site, page status, review date, hyperlink to edit mode, and location line of each page in the report.

All Pages Scheduled for Archiving

To identify all pages in the system in scheduled to be archived. This report includes the page title, site, page status, archive date, hyperlink to edit mode, and location line of each page in the report.

The ACM toolbar

Once you log into ACM, you will see a toolbar at the top of your web page. If you are ever having trouble accessing a page you know you have rights to work with, check that you can see the ACM toolbar on your page. If it is not there, you are not logged in to ACM.

At a minimum, you should see the following buttons on your toolbar.

Thumbtack

The thumbtack allows you to lock or unlock the toolbar from its position at the top of your browser window. Unlocking the toolbar will keep it at the top of your screen even when you scroll down a page.

Greeting

Displays a greeting message with either your first name or your username.

Logout

Used to log out of ACM.

My Sites

Shows all sites to which you have authorized access.

Site Menu

Shows site menu for the site you are viewing and provides a means to navigate throughout that site.

My Page

Displays My Page.

Help

Accesses the online help system and provides a display for support contact information.

If you have rights to any of the admin areas, you will see an Admin button to the right of the My Page button. You can click this to go to the admin center or roll over it with your mouse to link to any of the admin options you have access to.

Any users with the right to edit pages will also see a button providing them with the ability to create a new child page from the tool bar in view mode and full edit mode.

Any users with the right to share content to a Social Media Network will also see a share button. This button will allow them to post the URL of the current page along with a custom message to any configured Social Media site. See Appendix T – Social Media Integration for configuration details.

Online Help

The Online Help system provides procedures, conceptual information and a glossary of terms. The Help button is located on the far right of the ACM toolbar, and is always available while logged in to ACM.

There are three methods of navigating the help system:

- The Contents tab: provides a linear view of the help system, allowing you to browse through grouped topic areas, which are then broken into specific subjects.
- The Index tab: provides a keyword entry box that will jump to the topic entered and display all entries for that topic.
- The Search tab: provides a search entry box that will return all entries for the search term

Using the Index is the recommended form of using the Help System, as it is usually easier to locate your specific area of help. Searching often returns a large number of entries that are not relevant to your search.

When you have finished using the help system, you can close the browser window.

If searching through the online help system did not provide the answer to your question, you can contact the support desk. Support contact information can be found by rolling your mouse over the Help button and selecting About ACM from the dropdown. This window also contains information that may be helpful to the support analyst.
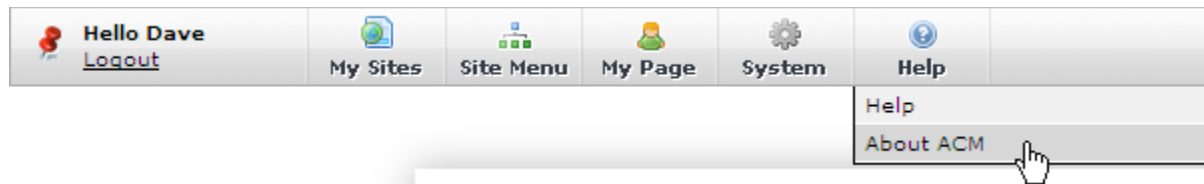
Admin Centre Introduction

The Admin Center is where all of the administrative and management tasks for your websites are performed. By default only system administrators have complete access to the center. Other users can be given rights to one or more of the Admin Center options.

Clicking on the Admin Center button in the ACM Toolbar displays the site management options available, based on your user rights.

MANAGE	SYSTEM
User Manager: The User Manager allows you to add new users and to view, edit, and delete existing active and inactive users. In addition, it allows you to manage users' personal, group, and system role information.	**Sites:** The system Sites manager allows you to add, edit and manage all aspects of the various sites running on your system. This includes management of personalization permissions, and definition of site-specific general, user, and email settings.
Group Manager: The Group Manager allows you to add, edit, and delete groups, including changing the group type, including adjusting group membership.	**Export:** The Export Manager allows you to manage all aspects of the export process, including setting up the automated export schedule.
Workflow Manager: The Workflow Manager allows you to create and design workflows, and to assign those workflows to any page on your sites.	**Page Types:** The Page Types Manager allows you to add and manage all specialized page types on the system, including setting default and static information for each page type.
Digital Assets Manager: The Digital Asset Manager allows you to add new digital assets into the system, or to edit, download, or delete existing digital assets.	**Site Design:** The Site Design Manager allows you to upload new templates into the system, as well as downloading previous template packages and managing the pages on which each template will be displayed.
Syndication Manager: The Syndication Manager allows you to manage a library of centralized content that can be reused and inherited to different parts of your system. This Manager provides the capacity to share common predefined page components between all of your sites.	**Meta Tags:** The Meta Tags Manager allows you to customize the meta data that is collected for every site and page on your system.
Archive Manager: The Archive Manager allows you to restore and delete archived pages.	**Global System Variables:** The Global System Variables Manager allows you to manage all global and default settings for the system as a whole.
Email Broadcast Manager: The Email Broadcast Manager allows you to create, send, and manage mass emails.	**System Events:** The System Event Manager allows you to manage all system events for the system as a whole.
Cache Policy Manager: The Cache Policy Manager allows you to configure cache policies, and to assign those policies to any page, digital asset, or special folder on your sites.	**System Information:** The System Information interface provides summary information about your software and system status.
LDAP Integration Manager: The LDAP Integration manager enable User Managers to synchronize users and group setting from LDAP servers available on the network.	
Diagnostic Manager: Diagnostic Manager helps System Administrators pinpoint problems with the system by executing diagnostic tests and viewing the results.	
SSL Manager: The SSL Manager allows Site Administrators to control the SSL handling of pages beyond the basic functionality provided by IIS, including the capacity to require SSL on individual pages.	

User Manager

User Accounts

A User Account is made of the pre-defined questions required by ACM and any System or Site User Profile questions defined by the System Administrator.

For users that use ACM login, the only field that must hold unique information in each User Account is the Login User Name.

Create a User Account

Use the following procedure to create new users. Once created, you can assign them to groups and give them access to one or more of your web sites and/or site groups.

Note: Hosted clients have users that use ACTIVE Passport to sign in. If you are creating a user for someone who already has a Passport account, follow the instructions below and enter the user's Passport email address in Login Username.

To create a user account:

1. From the Settings menu, select **User Manager**.
2. Click **Add User**.
3. Check the **Active** checkbox if you want the user to be active. The default is usually set to Inactive which is useful for if you have external people applying for user accounts on your site and you don't want their accounts automatically activated
4. Leave the **Locked Out** checkbox blank. Only check this if you want to keep someone from accessing your website.
5. If this user is to be a Public User with limited site access, be sure to check the **Public User** checkbox. If you select the Public User option, the groups that you can add the user to will be limited to public access groups which will be displayed on the Groups tab.
   User accounts created with the Application Form page set to Public Accounts will automatically have the Public User checkbox selected.
6. Enter the First, Middle, Last and Preferred names.
   Note: Preferred Full Name is the name the system will use to identify the user.
7. Enter a **Login Username**. The system does not allow duplicate user names within the same Site Group. If the users are in different Site Groups, their usernames can be the same.
8. Add the contact Email for this person.
9. Skip to the **Site Group** field and select the applicable site group for this individual. If this user will be performing functions in more than one site group, be sure to select (none) here. After you save the new user, you will be able to assign them to various roles across site groups, using the Groups tab.
   Note: Your site might not use site groups or if it does, you might not have permission to see these settings.

10. Click **Save**. The Personal Information and Groups tabs are displayed.
11. Complete the fields and questions on the **Personal Information** tab. The items that appear on this tab come from the User Profile tab of the Global System Variables.
    Note: If you selected a specific site group in step 9. above, the **Site Group "XXXXXXX" Managers** checkbox will be displayed on the Personal Information tab. If this person is a manager for the site group they belong to, check this checkbox, otherwise leave it blank and select one or more of the other groups displayed below on this tab.
12. On the **Groups** tab, assign the user to the desired groups, sites groups and roles and click **Save**. Groups displaying a large blue P are public access groups which are for **Public Users** only.
    If you have not created groups yet, click Save to save the user record, go to the Group Manager to create groups, and then assign users to the groups while in the Group Manager.

Locate a User Account

There are a number of ways you can locate user records in the User Manager.

> **Note** Users marked with a "P" are public users.

Open the User Manager. Choose one of the following methods to locate the user record:

First letter of last name

To locate a user account:

1. Click on the first letter of the last name.
2. Locate the name in the search results.
3. Click on the **Name**.

Use the search

To locate a user account:

1. Enter a portion (must be more than one character or ACM will return all users with that character) of the user's first name or last name or their email address, in the **User Search** field.
2. Click **Search**.
3. Locate the name in the search results.
4. Click on the **Name**.

By group name

To locate a user account:

1. From the **Group/Folder** drop-down, select a group that you know the user belongs to.
2. When the members of the group are displayed, locate the user name in the list.
3. Click on the **Name**.

Public Users Only

To locate a user account:

1. Check the "Public Only" checkbox to search for only users that are flagged as public users.

   Note When viewing search results in the User Manager, you can sort the information by clicking on a Column Header.

Modify a User Account

All fields in a User Account can be modified and saved. Changing a User Password is unique; an additional dialog box will open, requiring both it and the Edit User page to be saved.

Note: These instructions are for users that use ACM login. Users that use ACTIVE Passport change their passwords in Passport.

To change a User Password:

1. Open the User Manager.
2. Locate the User Account to edit.
3. Click Change Password.
4. On the **Change Password** dialog, enter the new password.
5. Enter the password again in the **Retype New Password** field.
6. Click **Save**.
7. When returned to the **Edit User** page, click **Save** again.

Copy a User Account

When you need to create a new user account and many of the settings will be the same as another user already in the system you can open an existing user record and copy it as a template for a new record.

To copy a user account:

1. Open the User Manager.
2. Open the **User Account** to copy or create a new user and save.
3. Click Save & Copy.
   The original user account will be saved and closed, and a new user record is opened. The new account will not be a permanent record until it is saved.
   A new inactive user record is created. The user details will display a copied First Name, the previous record's last name, and a copied preferred full name. You will need to update these fields and complete all the required fields before the new record can be saved.
   The Group assignments will remain the same as the original record.
4. Click **Save**.
   Any Personal Information questions created for the user records will now be available to be completed, any required questions must be answered prior to saving the record.
5. Make any edits that may be required for the new user account.

6. Click **Save** again to close the record or **Save & Copy** to create another user record based on the same user information.

Delete a User Account

Deletes a user from ACM but retains the record in the database. If you want to temporarily suspend a user's access, you should *deactivate* the user.

To delete a user account:

1. Open the User Manager.
2. Locate the User account.
3. Once the User record is displayed, click **Delete**.
4. A confirmation screen will display. Click **OK** to delete user.

   Tip If you attempt to delete a User Account and the User is a member of a group that is assigned to an active Workflow (assigned to pages). You will receive a message warning of this fact and the account will not be deleted.

   You must first remove the User from any Groups currently assigned to a Workflow. You will then be able to delete the account.

   If the User you are removing from the Group is the last member of the Group, you will need to add a User to the Group before you will be permitted to delete the original user.

   Note As of version 8.9, a deleted username can now be reused within the CMS.

Mass User Import Tool

An administrator has the ability to import a full list of users through the ACM UI. In a CSV file, users can be assigned a username, password and added to any number of pre-existing groups. Both normal ACM users and public users can be added.

Note: This procedure outlines how to import users who will use ACM login. To learn about how to import users who will use ACTIVE Passport, contact Customer Support.

Import User List

To import a user list:

1. In the User Manager, click the **Import User List** button to be directed to the user import screen.

USER IMPORT
Admin Center > User Manager > User Import

(1) SETTINGS	(2) PREVIEW	(3) FINISH	Preview

File:
REQUIRED
Browse...

Download standard user list template   Download public user list template

Public Users: ☐

First row has column names: ☑

(1) SETTINGS	(2) PREVIEW	(3) FINISH	Preview

2. Depending on what type of users you wish to import, download either the standard user template or the public user template by selecting the corresponding link. The format for each is as follows:

Standard User List Template

Column A – Preferred Full Name (required)
Column B – First Name (required)
Column C – Middle Name (optional)
Column D – Last Name (required)
Column E – Username (unique, required)
Column F – Email (required)
Column G – Password (required)
Column H – Group (optional)
Column ? – Group (optional)

Public User List Template

Column A – Preferred Full Name (required)
Column B – First Name (optional)
Column C – Middle Name (optional)
Column D – Last Name (optional)
Column E – Email (unique, required)
Column F – Password (required)
Column G – Group (optional)
Column ? – Group (optional)

Considering Your User Data

When you are building your user information and are required to create unique usernames and a password formula, have MS Excel do the work for you. Assuming you have the first and last name of a user already in the spreadsheet, you can build the following information with the appropriate excel formula.

For the person John Smith:

Preferred Full Name:

In the A2 cell, enter: =B2&" "&D2

Output = "John Smith"

Username

In the E2 cell, enter: =Left(B2,1)&D2&Row(B2)

Output = "JSmith2"

Password

In the F2 cell, enter: =Left(B2,1)&D2&Row(B2)

Output = "JSmith2"

After you have created each of these formulas, copy it into the rest of the cells in that column. This will generate a new value for each user.

> **Note** Since this data is only a reference to other cells in the spreadsheet, you must select each of the columns to which you added the formulas, copy those columns (Ctrl+C) and under the paste option, select "Paste Values". This will copy the output of the formula and actually paste it as the real value.

Importing Standard ACM Users

To import standard ACM users:

1. Click the **Browse** button and browse to the directory to which you have stored the standard user csv file you wish to import.
2. Make sure the **Public Users** checkbox is NOT selected.
3. If your csv file has a header row, check the box for **First row has column names**.
4. Click the **Preview** button.

5. The data from the csv file is displayed. Any errors will be highlighted. If you receive an error you wish to fix before importing, click the **Back** button. If you wish to continue importing the list:

6. Click **Run Import**.
7. The import may take a few minutes depending on the size of the list. After it is finished, the results of your import will be displayed.

Importing Public Users

To import public users:

1. Click the **Browse** button and browse to the directory to which you have stored the standard user csv file you wish to import.
2. Make sure the **Public Users** checkbox is selected.
3. If your csv file has a header row, check the box for First row has column names.
4. Click the **Preview** button.

5. The data from the csv file is displayed. Any errors will be highlighted. If you receive an error you wish to fix before importing, click the **Back** button. If you wish to continue importing the list:

6. Click **Run Import**.

7. The import may take a few minutes depending on the size of the list. After it is finished, the results of your import will be displayed.

USER IMPORT

Admin Center > User Manager > User Import

(1) SETTINGS	(2) PREVIEW	(3) FINISH		Back to (1)

IMPORTED PAGES:

Legend:

     = Warning: Record imported but requires editing of highlighted information.

     = Error: Record not imported due to errors.

Total number of rows imported successfully:	1
Total number of rows failed to be imported:	0
Total number of rows imported incompletely:	0

NO.	PREFERRED FULL NAME	FIRST NAME	MIDDLE NAME	LAST NAME	EMAIL	PASSWORD	GROUP	STATUS
1	Joe Public				joe@public.com	JPublic2	public group	Imported to Joe Public. Assigned to public group group.

(1) SETTINGS	(2) PREVIEW	(3) FINISH		Back to (1)

Group Manager

Plan the Groups

ACM users are assigned to groups. Group settings are used to control user access to management tools, editor tools and establish workflow functionality.

It is important to plan how to best group users. Consider the following when creating groups:

- Your organizational chart - break users into departments/functional areas; think about who will be performing tasks within each of those areas; for example:
- Mary will be creating content for the Human Resources department. She will not be performing any other functions. So she will be assigned to a Human Resources content provider group.
- Organize the users into groups based on their rights to do certain things within the department, for example:
- Mary will also need to access the Digital Assets Manager, the Pagelets (Syndication) Manager but no other Admin Center functions.

For more information, see [Appendix B – Group Types](#).

Group Folders

Group folders provide a method of organizing your groups into smaller, manageable, functional areas. When working in the Manage Folders area of the Group Manager you can only create, modify and delete folders. There is no access to groups.

Create Group Folder

To create a group folder:

1. Open the **Group Manager**.
2. Click **Manage Folders**.
3. Click **Add Folder**.
4. Enter the **Name** for the folder.
5. Provide a **Description** of the folder that others will see when viewing folders.
6. Select the **Parent Folder** for the new folder. This will determine the folder's location in the folder hierarchy.
7. Click **Save**. Repeat for all folders you wish to create.

Locate Group Folder

To locate a group folder:

1. Open the **Group Manager**.

2. Click **Manage Folders**.
3. Using the **Parent Folder** dropdown expand the folder view until the folder is located.

Modify Group Folder

To modify a group folder:

1. Open the **Group Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Click the **Folder Name** to view the folder details.
5. Modify the **Name** or **Descriptions** fields or select a new parent folder.
6. Click **Save**.

Delete Group Folder

To delete a group folder:

1. Open the Group manager.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Check the **Delete** box to the right of the Folder you want to delete. Click **Save**.

   or

   Click the **Folder Name** to view the folder details. Click **Delete**.

5. Click OK in the confirmation dialog box.

   Tip If you attempt to delete a Group Folder and there is still Groups or other Folders in it, you will receive a message warning of this fact and the folder will not be deleted.

   You must cancel the action and remove any dependencies from the folder. You will then be able to delete the folder.

Groups

Group are used to control user access to management tools, editor tools and establish workflow functionality.

Users can belong to multiple groups with different permissions. A user's rights within ACM are created *from all the groups* they belong to.

Create Group

To create a group:

1. Open the **Group Manager**.
2. Click **Add Group**.
3. Add the **Group Details** for the group.

Name

Enter the group name. Make sure you have given some thought to your group naming conventions prior to creating groups.

Description

Enter a description that provides information about the group such as the department(s), access rights or other pertinent information. This information is useful for understanding the group's purpose.

Group Folder

Select the folder you want to place this group in. The default is the root level Groups folder.

Group Type

Select the Group Type(s) for the group. (A group can be both a permission and workflow group.)

Permission

Select this group type if you are going to restrict group members' access to certain Admin Center functions.

Public

Select this group type if you are going to support the use of Public Users and wish to make certain that no permissions can be inadvertently applied to the group. This will disable all other group options. See Appendix N – Public Users for further details.

Eligible for Workflow

Select one or more workflow group types if users in this group will be performing the workflow functions listed.

Providers: Select this option if members of this group will be responsible for creating/editing content.
Approvers: Select this option if members of this group will be responsible for approving content.
Monitors: Select this option if members of this group will be responsible for monitoring content changes.

Page Owner

(This option is only visible if set in the Global System Variables.) Select this option to create a group of users that will be assigned as page owners throughout a sign. When used in combination with page owner template tag, page owner contact information is displayed on published pages.

Personalization

Select this option for groups that will access restricted areas of your website(s). Check the option Make available for External Applications and PageTypes if you want the group to be available in Custom Group questions on Application Forms. For more information, see Appendix F - Personalization.

1. Click Save.

2. Complete the information on each of the tabs. You can save the group at any time during the following steps; you will leave the Edit Group page and return to the Group Manager.

   Note The next settings will only be displayed when you are working with a group that is eligible for workflow (approver, provider or system administrator).

   See the System Information section in this guide for more information on registering HTML editors for use in ACM.

HTML Editor

Check one or more boxes of the editor types you want to make available to this group. This setting will determine the editors a user can choose from on their own "My Page" settings.
If a user has no HTML editor rights due to belonging to groups where no editors are selected, the only available option in their "My Page" settings will be the read-only editor. This view will display the content entered on a page without any capacity for the viewer to change or otherwise adjust what is shown.
If a user has the editor on their "My Page" set to a value that they no longer have rights to (either due to deselecting of the editor in the group settings, or due to the user's removal from a group), they will instead have the read-only editor selected.

Members Tab

Assign users to the group.

To assign users to the group:

1. Open the **Group Manager**.
2. Add or edit the group you want to select users for.
3. Click on the **Members** tab
4. Use the **Add Members** area to search for or list **Users** to add to the group.
5. Click the **Check Box** to the left of the User Name(s) you want assigned to the group.
6. Click the **Add Selected** button to add the Users to the Group.

Sites Tab

Give group access to one or more of your websites. The default setting is access to all sites.

To give group access to websites:

1. Open the **Group Manager**.
2. Add or edit the group you want to set site access for.
3. Click on the **Sites** tab.
4. If you want the group to have access to all sites, leave the **Available in all sites** checkbox checked.

   Note If you want the group to have access to some sites but not others, uncheck **Available in all sites** and select individual sites.

Tools Tab

Give group access to Admin Center Management areas.

To give group access to Admin Center Management areas:

1. Open the **Group Manager**.
2. Add or edit the group you want to set **Admin Center** access for.
3. Click on the **Tools** tab.
4. Check the box of each **Management Tool** you want the group to have access to.

    Note At a minimum, groups usually require the Admin Toolbar and My Page tools.

User Domain Tab

Set restrictions on User Manager Groups for any group permitted to manage users. The User Domain tab limits access to the User Accounts within the selected folder and its sub-folders.

To select folders that a group has access to:

1. Open the **Group Manager**.
2. Add or edit the group you want to set user access for.
3. Click on the **User Domain** tab.
4. Select the folder you want this group to have access to. Group members will be able to access only the users found in the selected folder.

Asset Domain Tab

Set restrictions on Provider Groups that can insert Digital Assets in to pages. The Asset Domain tab limits access to the digital assets within the selected folder and its sub-folders.

To select folders that a group has access to:

1. Open the **Group Manager**.
2. Add or edit the group you want to set Digital Asset folder access for.
3. Click on the **Asset Domain** tab.
4. Select the folder you want this group to have access to. Group members will be able to access only the Digital Assets in the selected folder.
5. Click **Save**.

    Note In ACM versions prior to 9.4, Asset Domains were ignored when a group was given permission to the Digital Asset Manager (DAM). As of ACM version 9.4, users within groups that are given access to the DAM and have either no defined asset domain or have an asset domain other than the root, will find their access to the DAM restricted to the defined domain of their group. This change allows the enforcement of Asset Domains while still providing users with access to a specified sections and tools of the DAM.

Pagelet Domain Tab

Set restrictions on groups that have rights to insert Pagelets into pages. The Pagelet Domain tab limits access to pagelets within the selected folder and its sub-folders.

To select folders that a group has access to:

1. Open the **Group Manager**.
2. Add or edit the group you want to set Pagelet folder access for.
3. Click on the **Pagelets Domain** tab.

4. Select the folder you want this group to have access to.

Page Types Tab

Restrict group access (the ability to add to the site) selected Page Types.

To restrict group access:

1. Open the Group Manager.
2. Add or edit the group you want to set Page Type access for.
3. Click on the Page Types tab.
4. Select the page types you want this group to have access to.
   For more information, see Appendix G – Page Types.

Locate Group

To locate a group:

1. Open the **Group Manager**.
2. Choose either:
   Enter a partial or full group name; select a folder using the Choose a Folder dropdown. Click **Search**.
   All groups matching the search term will be displayed.

   or

   Browse groups by selecting a folder using the **Choose a Folder** dropdown.
   All groups within the selected folder will be displayed.

   Note Groups marked with a "P" have been flagged as Public Groups.

Modify Group

To modify a group:

1. Open the **Group Manager**.
2. Locate the group you want to modify.
3. Click **View Summary** for a group report of all of the characteristics of the group.
4. Modify the group as required.
5. Click **Save**.

Copy a Group

When you need to create a new group and many of the settings will be the same as another group already in the system you can open an existing group record and copy it as a template for a new group record.

To copy a group:

1. Open the **Group Manager**.
2. Open the **Group** to copy or create a new group and save.
3. Click **Save & Copy**.
   The original group record will be saved and closed, and a new group record is opened. The new group will not be a permanent record until it is saved.

4. The group details will display a copied Group Name. You can save the new record as it is currently displayed or enter the new name (if known).
5. The Group type, HTML Editor, and all other settings will remain the same as the original record.
6. Make any changes to the new group settings that may be required.
7. Click **Save** to close the record or **Save & Copy** to create another group based on the same group settings.

Delete Group

To delete a group:

1. Open the **Group Manager**.
2. Locate the group you want to delete.
3. Choose either:
   Check the **Delete** box to the right of the Group(s) you want to delete. Click **Save**.

   or

   Click the **Group Name** to view the group details. Click **Delete**.

4. Click **OK** in the confirmation dialog box.

   Tip If you attempt to delete a group and the group has users assigned to it or the group is assigned to an active workflow (assigned to pages). You will receive a message warning of this fact and the group will not be deleted.

   You must first remove the users from the group or remove the group from the workflow. You will then be able to delete the group.

   If the group you are removing from the workflow is the last group assigned to the workflow, you will need to add a group to the workflow before you will be permitted to delete the original group.

Workflow Manager

Creating and applying Workflows within ACM is how you control which users can edit, monitor and approve pages and sections of a site. A Workflow corresponds to a series of steps involved in completing a process: moving content through the edit, review and approval phase into publication.

Each step within a Workflow consists of a task, and of one or more people who perform the task. For example:

1. Persons A, B, and C all create content (Content Providers) and submit it for approval.
2. Person D then reviews and approves (Approver Level 1) their content.
3. Person E then gives the final stamp of approval (Approver Level 2) of the content for publication.
4. Persons F and G simply receive email notification (Monitors) of the new content.

When you create your groups, you will see the three different Workflow type groups you can add users to: Provider, Approver and Monitor.

Once Workflows have groups or users assigned to them, they are applied to pages and sections of your site.

A user will not be able to change the workflow of a page in the workflow manager if the page is currently being edited by another user. The "(Edit)" hyperlink will change to display "(Locked for Editing)".

If a user, attempts to change the workflow of a group of pages that includes a page being edited, a message must appear stating that the workflow change cannot be applied because pages in the group are being edited.

Workflow Folders

It's good practice to organize the Workflow folders to correspond with the group folders. Workflows will be saved within these folders.

Create Workflow Folder

To create a workflow folder:

1. Open the **Workflow Manager**.
2. Click **Manage Folders**.
3. Click **Add Folder**.
4. Enter the **Name** of the new folder.
5. Provide a **Description** of the folder that others will see when viewing folders.
6. Select the **Parent Folder** for the new folder. This will determine the folder's location in the folder hierarchy.

7. Click **Save**. Repeat for all folders you wish to create.

Locate Workflow Folder

To locate a workflow folder:

1. Open the **Workflow Manager**.
2. Click **Manage Folders**.
3. Using the **Parent Folder** dropdown expand the folder view until the folder is located.

Modify Workflow Folder

To modify a workflow folder:

1. Open the **Workflow Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Click the **Folder Name** to view the folder details.
5. Modify the **Name** or **Description** fields or select a new parent folder.
6. Click **Save**.

Delete Workflow Folder

To modify a workflow folder:

1. Open the **Workflow Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Choose either:
   Check the **Delete** box to the right of the folder you want to delete. Click **Save**.

   or

   Click the **Folder Name** to view the folder details. Click **Delete**.

5. Click **OK** in the confirmation dialog box.

Workflows

Try to make Workflow names descriptive of who uses it. For example: HR workflow for the Human Resources area of the site.

Once you have created a Workflow, if you need to create additional Workflows that have the same member groups and properties, you can copy the Workflow and save it with a new name.

Create a Workflow

To create a workflow:

1. Open the **Workflow Manager**.
2. Click **Manage Workflows**.
3. Click **Add Workflow**.

4. In the **Workflow Details** section, make sure the **Active box** is checked.
5. Enter the **Name** of the workflow.
6. From the **Folder** drop-down, select the folder for the workflow to be saved in.
7. If you want the group to have access to all sites, leave the **Available in all sites** checkbox checked. If you want the group to have access to some sites but not others, uncheck **Available in all sites** and select individual sites.

   Note Make sure your site settings are the same as the group site settings that will be used in the workflow. If they are different, you will not see the groups you intend to set within the workflow.

8. Click Save or Save and Add to continue creating new Workflows without assigning any User Groups to the Workflow.

Assign Providers

Providers are the users who are responsible for creating and editing content.

To assign providers:

1. Click **Manage Workflows** and add or edit the Workflow you want to assign Providers to.
2. Go to the **Providers** tab and under the **ROLE** column, click on the **Provider(s)**: link.
3. Select a group on the **Groups** tab or specific individuals from the **Individuals** tab.

   Note When adding individuals, you must place a checkmark beside each name you wish to add and then scroll down and click Add Selected. Then click OK.

   Group not there? If you do not see a group that you expected to, it means that you did not set the Group Type to "Provider," or that that the Group and Workflow are assigned to the different Site(s). You need to return to the Group Manager and check the group settings.

4. Click **Save**.

Assign Monitors

Monitors are the individuals who will receive notification of content changes.

To assign monitors:

1. Click Manage Workflows and add or edit the workflow you want to assign Monitors to.
2. Go to the Monitors tab and under the ROLE column, click on the Monitor(s): link.
3. Select a group on the Groups tab or specific individuals from the Individuals tab.

   Note When adding individuals, you must place a checkmark beside each name you wish to add; scroll down and click Add Selected, and then click OK.

   Group not there? If you do not see a group that you expected to, it means that you did not set the group type to "Monitor," or that that the Group and Workflow are assigned to the different Site(s). You need to return to the Group Manager and check the group settings.

Click Save.

Assign Approvers

For each approval level that you create, you can add one or more Groups or Users who will be responsible for approving content.

> **Note** If you create a Workflow and do not add any Approvers, the Providers assigned to that Workflow will be able to publish their own content.

To assign providers:

1. Open the **Workflow Manager**.
2. Click **Manage Workflows** and add or edit the workflow you want to assign Approvers to.
3. Go to the **Approval Levels** tab and click **Add Approval Level**.
4. In the **LEVEL** column, click on the **Level 1** link.
5. Select a group on the **Groups** tab or specific individuals from the **Individuals** tab.

> **Note** When adding individuals, you must place a checkmark beside each name you wish to add; scroll down and click **Add Selected**, and then click **OK**.

> Group not there? If you do not see a group that you expected to, it means that you did not set the group type to "Approver," or that that the Group and Workflow are assigned to the different site(s). You need to return to the Group Manager and check the group settings.

6. Select an option from the **Approval** drop-down.
   - **One**: One vote needed to Approve. All votes needed to Reject.
   - **All**: All votes needed to Approve. One vote needed to Reject.
   - **Majority**: The majority of votes needed to Approve. 50% or more needed to Reject.
   - **First**: The first action taken on the page is what occurs.

Understanding Approval Options

If only "One" person is required to approve a page, ACM cannot know if the page has been approved until either a) someone approves the page or b) everyone has voted and rejected the page.

If the "All" approval status is used, ACM cannot know if the page has been approved until either a) someone rejects the page or b) everyone has voted and approved the page.

If the "Majority" approval status is used, the workflow action will occur as soon as a majority is reached. In the event that there is an even number of approvers and the vote is 50/50, the page will be rejected.

If the "First" approval status is used, the first workflow action is the one that is used, all subsequent actions are ignored. If the first vote is for approval, the page will be approved. If the first action is for rejection, the page will be rejected.

An Approver can vote multiple times if desired (only the latest vote counts). If the action represents a changed vote, the user receives a confirmation message and can add a new Note. After each vote, the page's approval/rejection status is evaluated based on the current tally of votes, the current rule for that level, and the current approval level membership.

7. Use the default number of Escalation Days or change the setting. When the escalation period is reached, notification that action is required on the page is sent to the next level of approver and to the Monitor and System Administrator groups.
8. Repeat this procedure to create additional Approval levels if required. Each subsequent approval level will receive an email notification when the previous level has finished their review.
9. Click Save.

Locate Workflow

To locate a workflow:

1. Open the **Workflow Manager**.
2. Click **Manage Workflows**.
3. Choose either:
   Enter a partial or full workflow name; select a folder using the **Choose a Folder** dropdown. Click **Search**. All groups matching the search term will be displayed.

   or

   Browse workflows by selecting a folder using the **Choose a Folder** dropdown. All workflows within the selected folder will be displayed.

Copy Workflow

This process can take place at any time while creating or editing a Workflow while in the Workflow Details page.

To copy a workflow:

1. Open the **Workflow Manager**.
2. Click **Manage Workflows**.
3. Locate the Workflow you want to copy.
4. Click the name of the Workflow you want to copy. Workflow Details Page will open.
5. Click **Save & Copy**.
6. Workflow will be copied, and default name created "Copy of Workflow".
7. Change the Workflow Name to something unique.
8. Click **Save**.

Modify Workflow

To modify a workflow:

1. Open the **Workflow Manager**.
2. Locate the Workflow you want to modify.
3. Click **View Usage** for a report of what sites and pages the Workflow is assigned to.
4. Modify the Workflow as required.
5. Click **Save**.

Delete Workflow

To delete a workflow:

1. Open the Workflow Manager.

2. Locate the Workflow you want to delete.
3. Choose either:
   Check the **Delete** box to the right of the Workflow(s) you want to delete. Click **Save**.

   or

   Click the Workflow Name to view the Workflow details. Click **Delete**.

4. Click **OK** in the **Confirmation Dialog** box.

   Tip If you attempt to delete or make a Workflow inactive and the Workflow is assigned to pages, you will receive a message warning of this fact and the Workflow will not be deleted.

   You must first remove the Workflow from all assigned pages. You will then be able to delete or make the Workflow inactive.

Applying Workflows

To apply a workflow:

1. Open the **Workflow Manager**.
2. Make sure the correct site is selected in **Site** dropdown.
3. From the **Page List**, locate the page to assign a Workflow to and click the (**Edit**) link at the end of the Title.
4. On the **Select Workflow** dialog, either:
   - Select **Use Parent Page's Workflow** if you want the page to use the same Workflow assigned to its parent page.
   - Select the Workflow from the list if you want the page to have a Workflow that is different than that of the parent page.
5. If you want to force all child pages of the page to use the same workflow, click **Set Child Workflows**.
6. Click **Save** on the **Select Workflow** dialog. The name of the Workflow you just assigned appears in brackets now at the end of the page name.

   Note If you force the Workflow to child pages by setting Child Workflows, the assigned Workflow not appear on all the child pages, it will only appear in brackets at the end of the parent page name.

Digital Asset Manager

The Digital Asset Manager is where digital files are organized and stored for use throughout ACM. A digital asset is any file that you will want to either insert to display on a page, such as images or video; or insert as a link on a page, such as PDF, Word, or Excel files. The Digital Assets Library only displays five folder levels including the top-most level Digital Assets folder.

Only Digital Asset Managers can modify assets once they're in the system. By definition, a Digital Asset Manager has rights to the entire library structure.

In ACM versions prior to 9.4, Asset Domains were ignored when a group was given permission to the Digital Asset Manager (DAM). As of ACM version 9.4, users within groups that are given access to the DAM and have either no defined asset domain or have an asset domain other than the root, will find their access to the DAM restricted to the defined domain of their group. This change allows the enforcement of Asset Domains while still providing users with access to a specified sections and tools of the DAM.

Digital Asset Folders

It is good practice to create the Digital Assets folder structure to duplicate either:

- the structure of your User Group folders, or
- the structure of your website.

This will make managing access to Digital Assets easier if you want to limit Digital Assets rights at the group level.

Create Digital Asset Folder

To create a digital asset folder:

1. Open the **Digital Assets Manager**.
2. Click **Manage Folders**.
3. Click **Add Folder**.
4. Enter the **Name** of the new folder.
5. Provide a **Description** of the folder that others will see when viewing folders. This tells people what types of Digital Assets are in the folder.
6. Select the **Parent Folder** for the new folder. This will determine the folder's location in the folder hierarchy.
7. Click **Save**. Repeat for all folders you wish to create.

Locate Digital Asset Folder

To locate a digital asset folder:

1. Open the **Digital Asset Manager**.

2. Click **Manage Folders**.
3. Using the **Parent Folder** dropdown expand the folder view until the folder is located.

Modify Digital Asset Folder

To modify a digital asset folder:

1. Open the **Digital Asset Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to modify.
4. Click the **Folder Name** to view the folder details.
5. Modify the **Name** or **Description** fields or select a new parent folder.
6. Click **Save**.

Delete Digital Asset Folder

To delete a digital asset folder:

1. Open the **Digital Asset Manager**.
2. Click **Manage Folders**.
3. Select the **Parent Folder** of the folder you want to delete.
4. Choose either:
   Check the **Delete** box to the right of the **Folder** you want to delete. Click **Save**.

   or

   Click the **Folder Name** to view the folder details. Click **Delete**.

5. Click **OK** in the **Confirmation Dialog** box.

   Tip If you attempt to delete a Digital Asset folder and there are used Assets in the folder, you will receive a message warning of this fact and the folder will not be deleted.

   You must first move the used Assets to a different folder. You will then be able to delete the folder.

   If a Digital Asset folder contains only unused Assets, then you can delete the folder. All unused Assets in the folder will also be deleted.

Digital Assets

Digital assets include: images, PDFs, text files, PowerPoint presentations, audio and video, etc.

Add Assets

Digital assets can also be uploaded to the Asset Library while using the Content Editor.

> **Note** It is good practice to correctly size all of your assets before making them available for use.

If you are going to be creating Digital Asset Galleries this is especially important so that your photos and images are consistently sized.

Add a Single Digital Asset

To add a single digital asset:

1. Open the **Digital Asset Manager**.
2. Click **Add Asset**.
3. Check the **Active** box to make the asset available for use.
4. Enter the **Name** of the digital asset. The name is used to create the file name of the asset.
5. Enter the **URL Title** of the digital asset. This is the title that acts as a file name for the page for friendly URL dynamic sites. For example a PDF file's URL title : "councilagenda" will create the file name "councilagenda.pdf".
   If you leave the URL Title field blank, the Title field is used for the filename. If you are not sure what type of site you have, speak to your System Administrator.
   Use only alphanumeric characters in the URL Title field. All other characters will be converted to the same replacement characters used throughout friendly URL sites.
6. Enter the **Description** of the asset. This field allows a maximum of 1000 characters.
7. Enter an **Alt Tag**. Alt Tags are displayed in browsers when an image or link is moused over.

   Note Alt Tags are required as this is an attribute of the img tag and is meant to be an alternative for non-visual browsers when they come across images. This means, that the text is meant to be used when the image is not visible on the page. Instead, what is displayed (or read) is the alternative text.

8. In the **Assign to Folder** field, select the digital assets folder you want to put the asset into.
9. In the **Upload** field, click **Browse** and select the file to add to the library.
10. Click **Save**.

    Note Once an asset has been saved, the digital asset details must be viewed in order to preview it, assign it to sites, and to view detailed information regarding its usage, type and history. (See Edit Digital Assets for more information.)

Add Multiple Digital Assets

Multiple digital assets are uploaded using a .zip file. This feature is only available within the Digital Asset Manager and is not available from within the HTML editor.

You must select a single, pre-existing digital asset folder that the new digital assets will be created in. If you do not select a digital asset folder, the default location for all newly-uploaded digital assets is the root folder.

To add multiple digital assets:

1. Open the **Digital Asset Manager**.
2. Click **Add Multiple Asset**.

3. Check the **Active** box to make the assets available for use.
4. From the **Assign to Folder** drop-down, select the location for the new assets.
5. In the **Upload** field, click **Browse** and select a .zip file to upload.
6. Click **Save** to proceed with the file upload or click **Cancel** to exit from uploading the selected .zip file and return to the Digital Asset Manager.
7. The zipped assets are opened and listed with their default names, created from their original file name. Both the name and alt tag will be created this way as digital assets require an alt tag to be saved. Digital assets uploaded using this method will have no default description.

   Note If a digital asset being uploaded has the same name as an existing digital asset already in the selected folder, the new asset will not be uploaded. After the file is processed, summary information is displayed, identifying the names of all successfully created digital assets, as well as identifying those digital assets which were not created and the reason why

8. At this point you have three options:
   • Choose to upload additional zip files
   • Cancel out of the multiple upload area and return to the Digital Asset Manager.
   • Edit the properties of the assets you've just uploaded.
9. Click the <<Edit Digital Assets Properties>> link to edit the Name and Alt Tags; and add a description to the images contained in the zip file.
10. Click **Save** to retain your edits or **Cancel** to return to the Multiple Asset upload area.

Locate Digital Assets

There are a number of ways you can locate Digital Assets.

To locate digital assets:

1. Open the **Digital Assets Manager**.
2. Enter a partial or full digital asset name; select a folder using the **Choose a Folder** dropdown. Click **Search**. All digital assets matching the search term will be displayed.

   or

3. Enter the digital asset ID; select a folder using the **Choose a Folder** dropdown. Click **Search**. The digital asset matching the ID will be returned

   or

4. Browse digital assets by selecting a folder using the **Choose a Folder** dropdown. All digital assets within the selected folder will be displayed.
5. Check the **Show Thumbnails** checkbox to see a small version of the image displayed in the search results.
6. Search results can be sorted by **Name**, **Description**, **Folder** or **Status** by clicking the column headers.
7. Click its name to open it in **Digital Asset Detail**.

Edit Digital Assets

Create a New Version

You can edit digital assets by downloading them from ACM, editing them in your preferred editor, and then re-uploading them.

To create a new version:

1. Open the **Digital Assets Manager**.
2. Locate the asset to edit. Click its name to open it in **Digital Asset Detail**.
3. Download the asset file.
   a. Under the asset viewer window, click **Download**.
   b. Click **Save File**. The asset is downloaded to your **Downloads** file.
4. Use your preferred editor to edit the asset file. You can change the name of the file if you wish. The system will still track the versions of the asset record in ACM.
5. Re-upload the edited file.
   a. Open the asset in **Digital Asset Detail**.
   b. Beside the **Re-Upload** field, click **Browse**.
   c. Locate the asset file you wish to re-upload and click **Open**.
6. Click **Save**.

Edit Properties

You can edit some properties of digital assets without downloading them.

To edit properties:

1. Open the **Digital Assets Manager**.
2. Locate the asset to edit. Click its name to open it in **Digital Asset Detail**.
3. Change the status with the **Active** checkbox; change the **Name**, **Description**, or **Alt Tag** fields or assign the file to a new folder.

   Note Updating the name and alt tag of the asset doesn't update the name and alt tag values on the pages where an asset is currently published.

4. On the **Sites** tab, indicate the sites where the asset is to be made available.
5. On the **History** tab, delete unwanted versions of the asset.
6. On the **Tags** tab, add metadata tags to the asset file. These tags allow images to be pulled and grouped dynamically based on tag values. Click **Add** to add a tag. ACM displays a free-form text field into which you can type anything, or ACM displays a list of predefined tags to select. Tags and tag entry are configured as part of setting global system variables.

Edit Digital Asset Images

You can edit images right in ACM using the built-in editor. If you edit an image this way, ACM creates a new version of the image.

The built-in editor supports files that are BMP, JPEG, PNG, or non-animated GIF.

The built-in editor has the following tools:

- Print
- Undo/Redo/Reset
- Crop
- Resize
- Zoom
- Opacity
- Rotate
- Flip
- Add text
- Insert image
- Brightness/Contrast
- Pencil

To edit digital asset images:

1. Open the **Digital Assets Manager**.
2. Locate the asset to edit. Click its name to open it in **Digital Asset Detail**.
3. Under the thumbnail image of the asset, select the **Edit** link to open the **Edit Digital Asset Image** page.
4. Select one of the icons in the toolbar to open an editing tool.

The toolbar above the image contains icons to open the various tools. The status bar below the image has information about the zoom, size, position, and last action. The lower right window corner can be used to resize the canvas.

> **Tip** After you open an image, click **Zoom** > **Best Fit** to resize the canvas to the size of your window.

Some tools have bounding boxes with controls on the top, bottom, sides, and corners. Use these controls to resize the bounding box. You can also click and drag the bounding box to a new position.

The following image shows the bounding box for cropping with its controls as small grey squares.
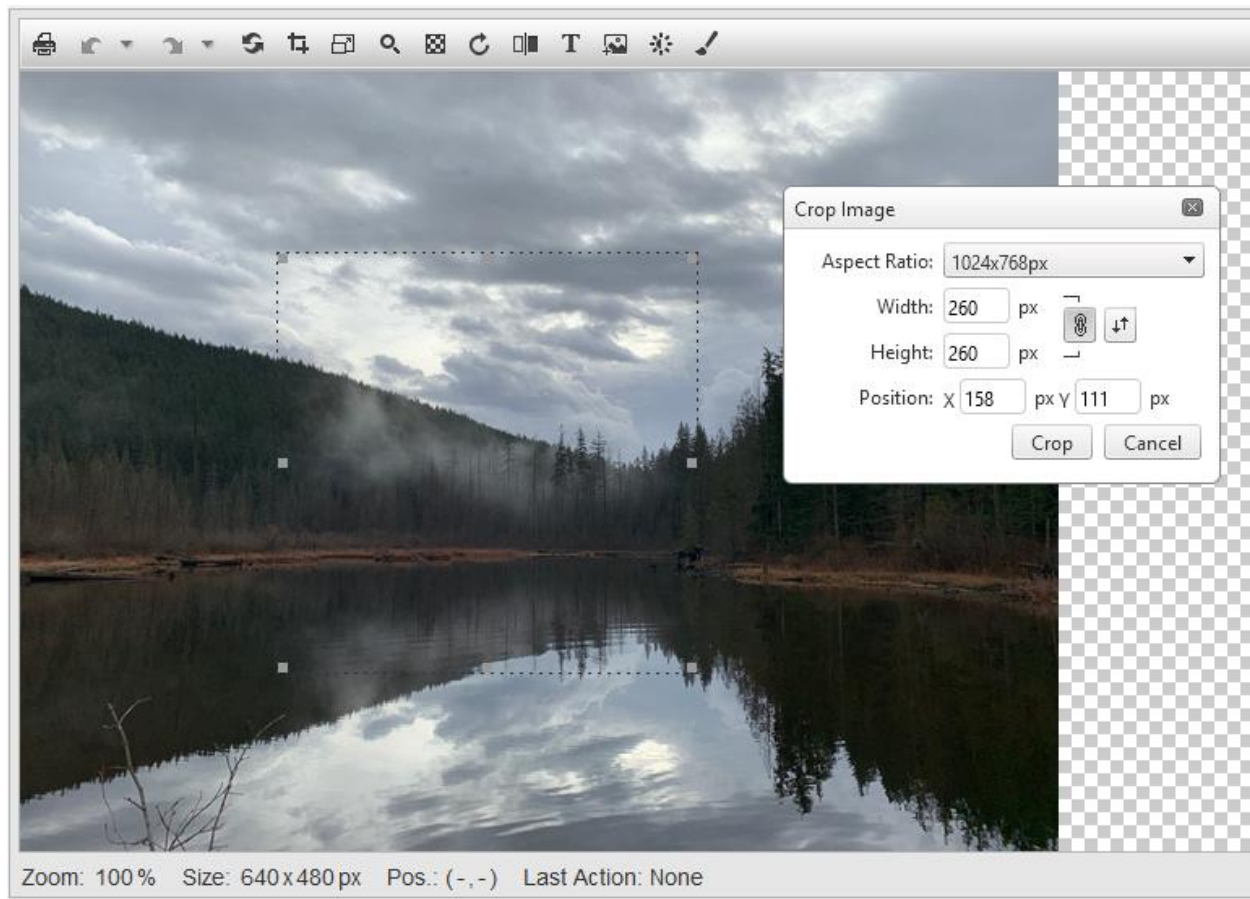
Print

Click the **Print** icon to print the image.

Undo/Redo/Reset

Click the **Undo** icon to reverse your most recent action; click the **Redo** icon to redo an action that you undid, or click the **Reset** icon to start over again.

Crop

Click the **Crop** icon to select a rectangular section of the image to retain while eliminating the remainder. The tool opens with a default square bounding box in the upper left that you can resize and move to another area on the image.

The **Crop** tool includes:

- Bounding box that you can resize and move.
- Common aspect ratios for the cropping rectangle.
- Width and height fields that can be used freely or while constraining the proportion of width to height.
- Position fields to move the upper left corner of the cropping rectangle.

- A button that swaps the value of the width with the value of the height.

Resize

Click the **Resize** icon resize the image, usually by making it smaller.

The **Resize** tool includes:

- Common preset sizes
- Width and height fields that can be used freely or while constraining the proportion of width to height.
- A percentage field to make the image smaller or bigger by changing the values of the height and width by a certain percentage.

Zoom

Click the **Zoom** icon to make the image appear smaller or larger on your screen. Zooming in or out doesn't affect the image itself, only its appearance in your window.

The zoom tool includes:

- A slider.
- A percentage field.
- A button to return the image to its actual size.
- A button to give the image the best fit on the canvas and your window.

Opacity

Click the **Opacity** icon to increase the transparency of the image.

The **Opacity** icon includes a slider.

Rotate

Click the **Rotate** icon to rotate the image clockwise or counterclockwise by increments of 90 degrees.

Flip

Click the **Flip** icon to flip the image up to down, right to left, or both.

Add Text

Click the **Add Text** icon to add words to the image.

The **Add Text** tool includes:

- A field to enter the text.
- A list of fonts.
- A field to specify the size of the font.
- A field to specify the color's hex code and a color picker.
- Position fields to move the upper left corner of the text box.

    Note: The text box tends to start new lines on its own; however, once you click the **Insert** button, new lines start only where you have pressed **Enter** in the text box.

Insert Image

Click the **Insert Image** icon to insert an image from the web onto your image.

The **Insert Image** tool includes:

- A bounding box that you can move and resize.
- A URL field for the location of the image and a button to set (download) it.
- Width and height fields that can be used freely or while constraining the proportion of width to height.
  - **Tip**: The bounding box defaults as a square. If the image to insert isn't a square, click the **Constrain Proportions** button to turn the feature off before you download the image. You can turn **Constrain Proportions** back on after the download. In this manner, the tool knows that the inserted image isn't a square. Otherwise, you might get unexpected results if you enter a value in **Height** or **Width**.
- Position fields to move the upper left corner of the bounding box.
- A button that swaps the value of the width with the value of the height.

Insert the image first and then resize and move it. To start over, click the **Set** button. Once you have finished resizing and positioning the image, click **Insert**.

Brightness/Contrast

Click the **Brightness/Contrast** icon to adjust the light and darks areas of the image.

The **Brightness/Contrast** tool includes:

- A slider for brightness: Adjust the brightness to make all areas of the image brighter or darker.
- A slider for contrast: Adjust the contrast to make bright areas brighter and dark areas darker or to make bright areas dimmer and dark areas lighter.

Pencil

Click the **Pencil** icon to write or draw on the image.

The **Pencil** tool includes:

- A color picker
- A list of line sizes

Delete Digital Assets

You must remove digital assets from the pages they are used on before you can delete them. If you are not sure what pages they are used on, see "Digital Asset Usage Information" in the next section.

To delete digital assets:

1. Open the **Digital Assets Manager**.
2. Locate the asset to delete.

3. Check the **Usage** tab of the asset record to make sure the asset is not in use on any published or workflow pages. If it is, you must remove it from those pages before deleting.
4. Click **Delete**.
5. Click **OK** to confirm the asset deletion.

Delete Digital Asset Versions

> **Note** You cannot delete the current version of a digital asset using this method.

Each time a new version of a digital asset is uploaded, the previous version is retained within the history of the digital asset. Since digital assets can be large, having multiple versions that are no longer on the site can use a significant amount of server space. You can delete any previous versions of a digital asset if you know they will not be restored and used again.

To delete digital asset versions:

1. Open the **Digital Assets Manager**.
2. Locate the asset you want to delete versions of.
3. Click the **History** tab of the asset record to view the version list of the asset.
4. In the **Delete** column, check the box of all the versions you want to remove.
5. Click the **Delete Selected Versions** button.
6. Click **OK** to confirm the permanent deletion of the digital asset versions.

   or

   Click **Cancel** to close the confirmation and return to the **Digital Asset Detail** window.

Digital Asset Usage Information

To see an overview of asset information:

1. Open the **Digital Assets Manager**.
2. Locate the asset whose usage report you want to view.
3. Click the **Usage** tab of the asset record. The tab displays site, page and location information for the asset.
4. To see a complete overview of the asset information, click **Asset Report** beside the **Active** checkbox near the top of the asset record.

Restore a Digital Asset

Restore an earlier version of a digital asset.

To restore an earlier version of a digital asset:

1. Open the **Digital Assets Manager**.
2. Locate the digital asset you want to restore.
3. Click the **History** tab; all of the versions of the asset are displayed.
4. Locate the version you wish to restore and click on the **Version** link. The page is refreshed and the version you selected is displayed in the asset view window. The

version links now display the word "Current". You can click on the word Current if you wish to see how the current version differs.

5. Click **Restore Asset** to restore the selected version.
6. Click **Save**. The restored version is added to the History with a new version number, with the date and time of the restoration.

Syndication Manager

Pagelets Overview

Use Pagelets to create a single instance of content to be used throughout your websites(s). By having a single instance of content, it can be edited once and updated on all pages the pagelet has been "syndicated" to.

Pagelets are created and edited in the same way pages for a site are created and must have Workflow applied to them in order to be created, edited and submitted for approval by Content Providers.

When a pagelet has been assigned to a page, or groups of pages the Pagelet Edit icon will be visible on the pagelet in View Mode for any user with rights to edit it. Clicking the edit icon will open the pagelet in Edit Mode, it is not necessary to return to the Syndication Manager to edit pagelets.

Pagelet Categories

Organize pagelets by creating Category child pages that act like folders. Within each category, create pagelets that should be grouped together.

Create Pagelet Categories

To create pagelet categories:

1. Pagelet Categories often duplicate the website structure.
2. Open the **Syndication Manager**.
3. Beside the **Pagelets** page, click **Edit**.
4. On the **Child Pages** tab, click **New** and select **Category** to create a new category.
5. Complete the fields in the **Page Summary** section.
6. Publish the new category pagelet.

Repeat this process to create all of your pagelet categories.

Move Pagelets

To move pagelets:

1. When you move a category pagelet, all of the child pagelets are moved with it. You can move complete categories of pagelets or an individual pagelet to a different category.
2. If the pagelet you want to move is published, open it in full edit mode.
3. If the pagelet is not published, edit its parent category page, go to the **Child Pages** tab and click on the pagelet you want to move.
4. In the **Page Summary** section, locate the **Move Pagelet** field.
5. Click on **<<Select Page>>**.
6. Select the new parent category pagelet and click **OK**. (Pagelets can only be moved under a category pagelet, they are the only page types that will be available in the tree view.
7. When the page is redisplayed, click **Save** and submit the page for approval or publish it.

    Note If the pagelet you are moving is due for Review, you cannot move it. You must make sure the pagelet is reviewed and then move it. If a pagelet is due for review, it will display this status in the child page list.

Insert Pagelets on Pages

In order for pagelets to be used on a page, the page template must contain IronPoint tags that function as placeholders for positioning Pagelet content on a page. For more information, see the *ACTIVE Content Manager Design Guide*.

In order for pagelets to be inserted on a page, Pagelet zones must be added to a page while in Full Edit mode.

Pagelet Usage Report

The main page of the Syndication Manager provides a link to view usage reports for every pagelet in the system.

By clicking the **Usage** link to the right of a pagelet title, you are able to view a report that lists the sites the pagelet is available to be used on, the published pages using the pagelet, and the pages in workflow using the pagelet.

The report opens in a new window, is in a printable format and lists the sites, titles and location lines of each page where the pagelet is assigned.

Syndicated Pages

In a similar manner to pagelets, syndicated pages represent content that can be reused in multiple places within a site or instance. In addition, there are web services that allow for the syndication of this content across ACM instances or to other web properties.

In the Syndication Manager, select "Pages" from the syndication type dropdown field. Any syndicated pages in the system will be presented. All of the same controls used to manage pagelets in the syndication manager also apply to syndicated pages. All syndicated pages have a container page that is placed in the site hierarchy. This container page will typically

provide a search and results function for the Syndicated pages and will ultimately render the content of the syndicated page. An example of this would be the new Syndicated Calendar Pagetype. The Calendar Pagetype resides in the hierarchy of your website and the calendar events (Syndicated Events) are stored in the syndication manager. The Calendar page will render the event details on your site when a visitor clicks on the event title in the calendar page.

Manage Syndicated Page Settings

> **Note** Prior to version 9.2, the Syndicated Page Settings resided in the Page Type Manager. As of version 9.2, they have been moved to the Syndication Manager.

The Syndicated Page Settings contain the default settings for the different syndicated pages in ACM. For details on each of these settings, please refer to the quick reference guides for the functionality you wish to better understand.

Archive Manager

Pages are archived from the Child Page list, or through setting an archive follow-up task on the Workflow tab., When a page is archived it no longer appears in the Child Page list (unlike when a page is made "Inactive" and does). Archived pages do remain in the database which allows them to be restored, or permanently deleted.

The Archive Manager provides the tools to restore or permanently delete pages from the database.

> **Note** When a page is deleted using the Archive Manager, the page and its child pages can no longer be restored.

Restore a Page

To restore a page:

1. Open the **Archive Manager**.
2. From the Site drop-down, select the site to work with.
3. Locate a page or pages:
   - Enter a full or partial title as a search term.
   - Click **Find All**.
   - Pages matching search term will be highlighted in list.

   or

   - Browse the page list by clicking any column header to re-order the pages.
4. To restore the page, select the checkbox in the corresponding row and click **Restore Selected**.
5. The restored page will now be located in the Child Page list of its original Parent Page. It will be Inactive and have no Workflow assigned to it.

Delete a Page

To delete a page:

1. Open the **Archive Manager**.
2. From the **Site** drop-down, select the site to work with.
3. Locate a page or pages:
   - Enter a full or partial title as a search term.
   - Click **Find All**.
   - Pages matching search term will be highlighted in list.

   or

   - Browse the page list by clicking any column header to re-order the pages.
4. To delete the page, select the checkbox in the corresponding row and click **Delete Selected**
5. Click **OK** when asked if you want to delete the page and all of its child pages.

Note When a page is deleted using the Archive Manager, the page and its' child pages can no longer be restored.

Note As of version 8.9, archiving a page will also automatically archive all child pages. This was done to maintain integrity between pages. In previous versions of ACM, archiving a page orphaned the child pages, providing no automatic navigation to those pages. When the parent page was deleted from the archive manager, the child pages would be deleted from the site. Maintaining the integrity of the parent/child relationship will remove the occurrence of surprise page deletions.

Page Lock Manager

If a site utilizes the Edit Lock feature of ACM, a page will remain locked for as long as the editing user's session remains active. Since there is a possibility that a page will remain locked for extended periods of time with no activity, the Page Lock Manager provides System Administrators with the ability to unlock a page.

Unlock a Page

To unlock a page:

1. Open the **Page Lock Manager**.
2. From the **Site** drop-down, select the site to work with.
3. Locate a page:
   - Enter a full or partial title as a search term.
   - Click **Find All**.
   - Pages matching search term will be highlighted in list.

   or

   - Browse the page list by clicking any column header to re-order the pages.
4. To unlock the page, check the **Unlock** checkbox and click **Save**.
5. The unlocked page will now be available to be edited or have workflow or page design settings changed.

Email Broadcast Manager

The Email Broadcast Manager is not part of the standard ACM installation; by default this feature extension is disabled. If you do not currently have this management tool please contact your Account Executive. When you have the appropriate license, the manager is enabled directly through a setting in the IronPoint.config file.

The Email Broadcast Manager is used to send mass email to a selected user group or individuals. There are currently no email logs; there will be no record of emails sent using this tool.

Required Groups

It is not necessary to create all of the following groups individually if the same person(s) are administering the complete function of email broadcasts. If that is the case, use the following examples as guides for the settings required for the one group.

Broadcast Subscription Group

Create the Subscription Group.

To create the subscription group:

1. Create a Group with an appropriate name (the group name will display on the application form if one is used).
   - In the **Group Type** area, select the option "Make Available for External Applications and PageTypes."
   - Under the **Sites** tab, select to make the group available to all sites, or only specific sites.
2. **Save** the group settings.

User Manager Group

Users in this group will be responsible for receiving email notifications when a subscription request has been received and for approving the applicants.

> **Note** The Global System Variable setting "Users are inactive when created" must not be checked for emails to be generated and sent when request is submitted.

> You may also want to edit the "Account Approved" email to better reflect its use in this process.

Set up the User Manager Group (or use existing group).

To set up the user manager group:

1. Create a new Group with an appropriate name
2. In the **Group Type** area, check the **Permission** box
3. **Save** (tabs for additional options will now be displayed)

- Under the **Members** tab, add users who will receive and approve subscription applications.
- Under the **Sites** tab, select to make the group available to all sites, or only specific sites.
- Under the **Tools** tab, select the options for "Admin Toolbar" and "User Manager" (you may provide other tools as you see necessary).
- Under the **User Domain** tab, change this from the default setting only if the Users that will be managed by this group are contained within a sub-folder area.

4. **Save** the Group settings.

Email Broadcast Manager Group

Add users to this group who will be responsible for sending Broadcast Emails. (Not necessary if only Administrators perform this function):

> **Note** When users send Broadcast Emails, their name and email address is used as the sender information. You may want to set up a generic user account for sending these emails.

To add users:

1. Create a new Group with an appropriate name
2. In the **Group Type** area, check the Permission box.
   - Under the **Members** tab, add users who will send the Email Broadcasts.
   - Under the **Sites** tab, select to make the group available to all sites, or only specific sites.
   - Under the **Tools** tab, select the options for "Admin Toolbar" and "Email Broadcast Manager" (you may provide other tools as you see necessary)
3. Save the Group settings.

Create an Application Form

This form uses the fields from the "Create a New User" form in the User Manager; there is no need to create fields for First, Middle, Last Names, Preferred Full Name, Login Username, Email or Password.

To create an application form:

1. Open the site that requires the Application Form.
2. Navigate to the page that will be the parent page of the form, open the page in Full Edit Mode.
3. Create a new Child Page using the Application Form page type.
   d. Give the form a **Title**.
   e. Scroll to the bottom of the page and add a **Thank You message**.
   f. **Save** the page (required to add Questions to the form)
   g. Under **Site Profile Question**, select **New**, and select "Custom Group (multi or single selection)".
   - Add the Question text

- Select the appropriate Group(s) as the answers.
  h. Add any additional questions for information you may want to collect from subscribers.
  i. Add any Introduction or Closing content that may be required.
4. Publish or submit the page for approval.

Create Accounts as Public Accounts

If you wish to flag accounts from outside of your organization as public accounts, you can select the "Create Accounts as Public Accounts" checkbox in edit mode. This will allow your public users to create an account with a little information as an email address, password and preferred name. More importantly, users flagged as "Public Users" can only be assigned to Public Groups that cannot have any permissions assigned to it. This adds an extra level of protection by assuring a user that is not part of your organization is never inadvertently given permissions on your site. See Appendix N – Public Users for more information.

Create and Send Broadcast Email

You can create and send broadcast emails.

> **Note** To have emails sent where the from address is for example noreply@activenetwork.com, select the **Use Reply To** checkbox in step 3.

To create and send a broadcast email:

1. From the **System** menu, open the **Email Broadcast Manager.**
2. To use the standard from address, clear the **Use Reply To** checkbox. The logged-in user's email address is the standard from address if you click the **Send Email** button. The default email address for the site is the standard from address if you click the **Send From System** button. No reply-to address is used if the **Use Reply To** checkbox is clear.
3. To use a different from address, select the **Use Reply To** checkbox and enter a valid email address in **From Email Address**. The system uses the from address as indicated. The logged-in user's email address is used as the reply-to address if you click the **Send Email** button. The default email address for the site is used as the reply-to address if you click the **Send From System** button.
4. Click the **Email To** link and select the group or individuals that are to receive the email broadcast.
5. Enter a **Subject.**
6. In the content editor, create the email content, or copy previously created content and paste it into the editor (JavaScript cannot be used).
7. Send the broadcast email:
   - If you are logged in as a member of an Email Broadcast Manager Group, you use the **Send Email** button.
   - If you are logged in as a System Administrator, you can use either the **Send Email** button or the **Send From System** button.

Cache Policy Manager

Output Cache Configuration

If you use ACM to run dynamic sites, using output caching enables you, for pages that support it, to achieve enormous performance improvement & CPU utilization reduction. Output cached pages are the only way ACM serves pages close to raw-HTML speed.

For instance, it is possible to go from an unacceptable performance with the CPU averaging 60% with long spikes to 100%; to averaging 3% with short spikes to 50% and have page time reduced to 55% of the pre-output cache time even when considering all requests (not just output cached ones).

The output cache is controlled by the **Cache Policy Manager** or by Web.config settings. A cache policy can be assigned to every pagedef, digital asset category, and special folder.

The ACM default is no output caching and no cache headers.

Create a New Cache Policy

To create a new cache policy:

1. Click **Manage Cache Policies**.
2. Click **Add Cache Policy**.
3. Name the policy.
4. If you want to send "Cache-Control: Public" headers with responses that use this cache policy, select the **Allow client-side cache** checkbox. Refer to RFC 2616 for a detailed explanation.
5. If you want to enable ASP.NET Output Cache for page requests that use this cache policy, select the **Allow Output Cache** checkbox. This setting has no effect on Digital Assets or Special Folders.
6. Set the **Cache Expiration Period** in seconds. This setting is used for both the Cache-Control and output cache periods.
7. Click **Save**.

Edit a Cache Policy

To edit a cache policy:

1. Click the **Manage Cache Policies** button.
2. Click the link of the policy you want to edit.
3. Make any required changes to the policy.
4. Click **Save**.

Delete a Cache Policy

To delete a cache policy:

1. Click **Manage Cache Policies**.

2. Check the **Delete** checkbox for any policy you want to delete.
3. Click **Save** to confirm the policy deletion and return to the **Manage Cache Policies** page.

Cache Policy Manager Resources

The Resources dropdown near the top of the window allows the user to pick from each site in the system plus two additional items: Digital Assets and Special Folders.

- If a site is selected, the resource list displays a hierarchical view of the site pages.
- If *Digital Assets* is selected, the resource list displays a hierarchical view of the digital asset folders and individual assets.
- If *Special Folders* is selected, the resource list displays a list of system folders.

Assign Cache Policy to a Resource

To assign a cache policy to a resource:

1. From the **Resource List**, click the (Edit) link beside the resource to assign a policy to.
2. Choose either:
   - Select the **Use Parent's Cache Policy** checkbox if this policy is the one you want applied to this resource. (if using the parent cache policy, go to item 4)

   or

   - Clear the **Use Parent's Cache Policy** checkbox if a different policy needs to be assigned.
3. From the **Cache Policy** drop-down, select the policy to be applied to the resource.
4. If the assigned policy should be used on all children of the resource, click **Save and Apply to Children**.
5. Click **Save**.

The default configuration assigns one cache policy at the root level and sets all children to use parent policy. This allows the user to enable output caching for the entire site simply by enabling output caching on the default cache policy.

Set up a specific folder in Special Folders

The **Cache Policy Manager** supports cache rules for specific folders of specific shared sites as seen in the **Resource List**.

To set up a specific folder:

1. On the **Cache Policy Manager**, select **Special Folders** in the **Resources** box.
2. Click **Manage Special Folders**.
3. Click **Add Special Folder**.
4. Enter the path of the folder in **Full Path**.
5. Click **Save & Add**.

LDAP Integration Manager

The purpose of the Directory Integration manager is to perform a one-way synchronization of User Accounts and optional User/Group membership, from your Directory Service to ACM on a regularly scheduled basis (or as needed when run manually).

This Manager is meant for IT staff and/or System Administrators who will be installing, configuring and maintaining ACM. You should be skilled at configuring Microsoft Servers (OS, IIS, SQL Server, etc.) and have a thorough understanding of DNS, TCP/IP, and Directory Services (ACTIVE Directory, eDirectory or LDAP).

For complete information on using the LDAP integration manager, please see the *Directory Integration Tool User Guide*.

Diagnostic Manager

The Diagnostic Manager is a troubleshooting tool that System Administrators can use to detect problems in the system, on a site-by-site basis. Sites are analyzed by running a number of user-selected diagnostic tests.

Displaying the Diagnostic Manager

To display the Diagnostic Manager in the Admin Center, add the following entry in the Ironpoint.config file, within the featureExtension section:

```
<featureExtension id="DiagnosticManager" enabled="True"
isMenu="True" category="Manage"
subcategory="SystemInformation">
<label>Diagnostic Manager</label>
<permissionGroup>SystemEvents</permissionGroup>
<url>/cm/diagnostic/webui/diagnosticmanager.aspx</url>
<description>Diagnostic Manager helps System Administrators
pinpoint problems with the system by executing diagnostic
tests and viewing the results.</description>
</featureExtension>
```

Running Diagnostic Tests

To run a diagnostic test:

1. Select the **Diagnostic Manager**.
2. Select the **Site** to run tests for.
3. If you only want results for failed tests, check the **Only Display Failures** box. If you leave it blank, you will see a line entry for each item that is tested.
4. Enter the **Email Results To** address. A report of the test results is emailed to this address upon completion of the diagnostics.
5. For each test you wish to run, check the **Active** box.
6. Click **Execute** to run the tests.

The test results indicate the computer name and the build number that the tests were run against. They will also itemize any errors that occur. If there are errors, contact your ACM Support Representative.

Restoring Default Test Scripts

Advanced users of the Diagnostic Manager can manually change the diagnostic script files to alter system parameters and other test information.

If the test scripts are customized you can restore the default test scripts, by clicking on the **Restore Default Test Scripts** button.

SSL Manager
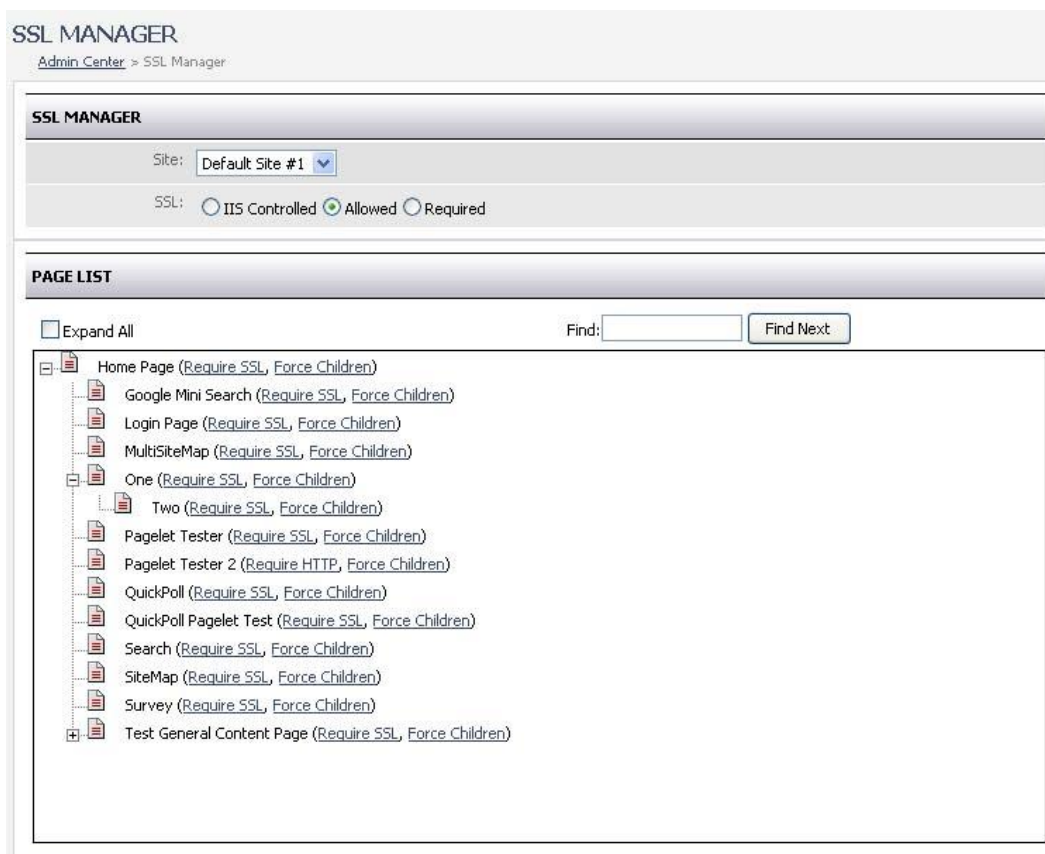
The SSL Manager is licensed - a license file is necessary in order to use the feature.

Due to the fact that SSL is set from the web server, this functionality is not supported in any way on exported HTML sites. Those sites will require SSL to be configured through the web server, as normal.

SSL Overview

If you are unfamiliar with SSL (Secure Socket Layer) functionality or would like to refresh your understanding of how SSL works and why it is used, you can find a variety of good information sources on the internet that explain it.

There are differences between what your IIS can do in terms of SSL configuration and what the ACTIVE Content Manager allows. IIS does not provide the capacity to automatically redirect users to the https port if http is used. In addition, due to how ACM handles certain page requests, IIS does not provide the capability to enforce SSL access on some pages while not enforcing it on others. In order to address these shortcomings an SSL Manager was added to the ACTIVE Content Manager.

ACM uses an Admin Center option called the SSL Manager to handle implementation of SSL on your sites. The system allows you to configure all or a portion of one or more of your sites for SSL. In addition, while Port 443 is the default port for SSL, other ports can be supported by configuring your IIS correctly.

> Note Only one port is supported for each IP address (SSL servers can only present one certificate for a particular IP/port combination)

In the SSL Manager, a radio button group is provided – allowing the user to select "**IIS Controlled**", "**Allowed**", and "**Required**". These settings work as follows:

- **IIS Controlled** – this site does not adjust SSL requests in any way on any page. If a page is accessed by https or http, the handling of the request is left to IIS and not handled by ACM in any way.
- **Allowed** – this site allows SSL on any page but does not require it. If a page that requires SSL is accessed with http, they are forced to https. If a page that does not require SSL is accessed with https, they are forced to http.
  - Newly created pages will always inherit the SSL redirection settings from the page's parent page.
  - The Manager has the capacity to force all child pages to use the same SSL redirection setting as the one it has been configured with.
- **Required** – this site requires that every page must use SSL. If a page is accessed by http, they are forced to https.

In the "SSL Manager" a site tree is displayed in the same way that the Site Design Manager works. There is the ability to "edit' and configure SSL "on" or "off" and force that functionality down to the children of the page.

Certificates

The SSL Manager does not provide the functionality for establishing certificates or configuring certificates on the web server. This functionality remains inside the web server (IIS) and is configured through the web server.

Enabling the SSL Manager

The SSL Manager must be enabled through the IronPoint.config file by adding the following lines of XML code, once the appropriate license has been added to the installation:

```
<featureExtension id="SSLManager" enabled="True" isMenu="True"
category="Manage" subcategory="Security">
<label>SSL Manager</label>
<permissionGroup>Sites</permissionGroup>
<url>/cm/webui/admin/sslmanager.aspx</url>
<description>The SSL Manager allows Site Administrators to
control the SSL handling of pages beyond the basic functionality
provided by IIS, including the capacity to require SSL on
individual pages.</description>
</featureExtension>
```

Implementing SSL

Use this procedure to implement SSL functionality on one or more pages within your site.

Be sure you have configured your ACM for SSL by adding the appropriate XML code to the config file.

To implement SSL functionality:

1. Open the SSL Manager.
2. From the Site drop-down, select the site to configure SSL for.
3. In the SSL field, select whether you want SSL settings to be controlled by your IIS, or if you want to allow or require them within ACM.
   - IIS Controlled site settings for SSL are controlled externally by your IIS. No settings are required in ACM. Site hierarchy is not displayed when you select this option.
   - Allowed this site allows SSL on any page but does not require it. If a page that requires SSL is accessed with http, they are forced to https. If a page that does not require SSL is accessed with https, they are forced to http.
   - Required this site requires that every page must use SSL. If a page is accessed by http, they are forced to https.
4. If you selected Allowed or Required, you must configure the SSL settings for each page or group of pages.
5. For each page you want to use SSL, click Require SSL. If you want all children of that page, click Force Children.

   Note If you want to force all children but not a parent, first set the parent to Require SSL, then click on Force Children, then click on the parent's Require HTTP link to turn off the SSL requirement for the parent.

Pagelets

Pagelets are not available for configuration in the SSL Manager. A pagelet must respect the SSL access used by the housing page. Since it's embedded, the pagelet is served as part of the HTTP or HTTPS request of the housing page, regardless of whether a different housing page uses another method.

Sites Manager

Used to define required Site information as well as configure the Export and Publication requirements.

Create a site

The Home and Login pages are automatically created with each site.

To create a site:

1. Open the **Sites Manager**.
2. Click **Add Site**.
   - **Active** checkbox: A site can be active or inactive at any time. For example, you may wish to have a test site setup, but deactivate it when not in use.
   - **Site Name**: Will be used as the name of the site throughout the application and must be unique. This name is not exposed for public viewing.
   - **Default Email** address: Used as the "From" email in correspondence sent from the site, i.e. survey and application form emails.
   - **Email Display Name**. The name associated with the default email.
3. If you want to use **Personalization** on this site, select if you would like to **Allow** it or **Require** it. (For more information, see [Appendix F - Personalization](#).)
4. Click **Save**.

Publication Tab

The settings on this tab are used by the ACM application when generating links, search pages, and system emails. They must be correct for the software to function correctly.

Click on the **Site Name** of the site you want to configure. Go to the **Publication** tab.

Static Properties

In order to export HTML files to your HTMLSites folder for static publication, make sure the **Generate HTML Files** checkbox is selected.

In order to export Search files to your SearchSites folder to enable search on both static and dynamic sites, make sure the **Generate Search Files** checkbox is selected.

> **Note** Individual PageTypes can be disabled for static publication. If you are having problems exporting your site, please check the Page Types Manager to see if all PageTypes are enabled for static publication.

The **FQDN** field is used to enter the Fully Qualified Domain Name of the website. For example: http://www.mydomain.com or http://209.2.23.11.

The **Virtual Directory (Alias)** field is used if the exported site is going to be referenced as part of a website's virtual directory.

Static URL is the public URL of an exported site. The Static URL is automatically created based on what you enter in the FQDN and Virtual Directory fields.

FTP URL is only for sites that get exported. It is the URL and directory where the HTML files are FTP'd to after they are exported. Be sure to include the 'ftp://'.

FTP Protocol establishes the file transfer protocol (FTP/FTPS/SFTP) and port to use. (The fields following the FTP Protocol are dependent on the protocol selected.) For more information, see Appendix L – SFTP and FTPS.

FTP Compatibility Flag [SFTP/FTPS] controls various server security compatibility features.

FTP Server Validation Type [SFTP/FTPS] is the method by which the server's certificate or public key is validated.

FTP Server Common Name [FTPS Only] is the name to be used when performing a name-check during the validation of the server certificate.

FTP Known Hosts File: [SFTP Only] is the file which contains the list of known hosts used to authenticate the server.

FTP Username is the username to use when connecting to the FTP server.

FTP Password is the password to use when connecting to the FTP server.

File Extension is the file extension to use for static exported files. This is usually set to .htm or .html.

Dynamic Properties

In order to export Search files to your SearchSites folder to enable search on dynamic sites, make sure the **Generate Search Files** checkbox is selected in the Static Properties section.

The **External FQDN** is the Fully Qualified Domain Name (FQDN) used for external links to dynamic pages. For example: http://acm.mydomain.com.

The **Internal FQDN** is the Fully Qualified Domain Name (FQDN) used when an address behind the firewall is required for export. This setting is used by the ACM application to render pages on the Server. To clarify, the software uses a virtual browser to generate the HTML files for static publication. If this field is blank, the External FQDN will be used. If you use this setting, please test the FQDN works in a browser on the ACM Sever. An IP address may be needed to get this to work; especially if your IIS server is behind a proxy server. Virtual directories do not need to be defined here.

Enable Friendly URLs to replace the generic page number and .aspx extension with more user-friendly URLs without having to lose the dynamic site functionality. For example, a page: http://cms.mysite.com/page123.aspx with friendly URLs enabled becomes http://cms.mysite.com/welcome.htm. (For more information, see Appendix K – Friendly URLs.)

Add User Profile Questions

User information can be captured on a site-by-site basis. The information gathered on each user record is stored centrally in the User Manager.

The questions you create in this section appear in the User Manager when users are created, on each user's My Page and on Application forms you create.

To add user profile questions:

1. Open the **Sites Manager**.
2. Add or locate the site you want to add user profile questions to.
3. Click on the **User Profile** tab.
4. Create User Profile questions. Refer to <u>Appendix I – Question Editor</u> for more information.
5. Click **Save**.

Set Site Variables

If you do not set variables at the site level, the site will use the Global System Variables. Some fields may not be visible if they are a system setting.

To set site variables:

1. Open the **Sites Manager**.
2. Add or locate the site you want to configure variables for.
3. Click on the **Site Variables** tab.
4. If you want to review the global variables, click **view system variables**.
5. Configure the individual site variables.

Number of Login Attempts Before Lockout

This is the number of times a user can attempt to login before the account is locked.

Disable follow-up task options

Check this box to disable the use of follow-up tasks within the site. When follow-up tasks are disabled here, the ability to disable the options as a page type setting is removed. When follow-up tasks are disabled the ability to set a follow-up task on a page is removed. Content providers will be unable to set pages to be reviewed, archived, or made inactive.

Default Number of Days until Follow-up Task (for more information see <u>Appendix C – Follow-up Tasks and Workflow</u>.)

Set the default number of days to reflect the default period of time until a page needs to be reviewed.

Number of Days until Escalation

If a task is not completed, an escalation email is sent to notify the appropriate individuals that the task is outstanding. The escalation emails are sent until the task is completed.

Maximum Levels in Site Menu

This setting controls how many levels of your website hierarchy are displayed on the Site Menu on the Admin toolbar. Setting this above one level can slow down ACM as your complete site menu renders.

Default Login Page

Click on the Login Page link to select the default login page for the site. By default this will be set to the login page created with the site.

Enable Extended User Action Logging

When you select items for extended logging, the information gets logged in the Internet Information Services (IIS) log files on your web server.

You can use a tool such as WebTrends (an external web stats software package) to review log information.

Enable Workflow notes

Uncheck this box to disable the use of workflow notes within the site. When workflow notes are disabled the pop-up window to enter notes no longer appears during the workflow process.

Enable Edit Lock

Check this box to provide the ability to lock down pages when they are being edited. By enabling edit locking, users will not be able to edit any content or settings of a page while another user is doing so.

Configure Site for Translation

This information applies only if you have the multi-language license. If you require the multi-language license, please contact your Account Executive. For more information, see [Appendix J – Multi-Language](#).

This information applies only to users who will be maintaining multilingual sites. Sites must be configured for translation and grouped into translation sets.

To configure a site for translation:

1. Open the **Sites Manager**.
2. Edit a site you want to include in the translation set.
3. Click on the **Translation Set** tab.
4. Be sure you have selected the correct Language for the site.
5. Decide if the site **Requires Translation**. Generally you would set your primary language site to require translation and set your secondary language sites to not require translation. So if you have English, French and Spanish sites and the English site is your primary site, you would set the English site to require translation and leave this unchecked for the French and Spanish sites.

   Note When you set a site to Requires Translation it means that no page on the primary language site will be published until the same page on all secondary

language sites have been translated and published. However, emergency publishing will temporarily bypass the need to translate before publishing.

If you choose to leave this checkbox blank, the requirement for translation can be set on individual pages or groups of pages. A field on the Translation Tab in the Page Editor allows a page and all of its children to require translation before the page can be published.

6. If the sites that will be included in your translation set already exist, you can group them together by clicking on the Change Translation Set button.
7. On the Add Sites to Translation Set dialog, select the sites you want to group with this one and click OK.
8. On the Translation Set tab, review the sites you have added and make sure the language settings for each site are correct.
9. If you have not created the sites to be grouped together in the translation set, click Save and create the other sites. Then group them into a translation set using step six.

Import/Export Sites

This feature allows you to create multiple sites quickly and easily. You can create a "site template" that includes pages, hierarchical relationships, workflows and other site design information and then export/import the site, creating as many new sites as you like from the existing one.

The following provides details of what is and is not exported:

- Exported sites retain the root folder associated with the original site
- Exported sites retain the default.aspx, Admin, and Templates folders
- Exported sites do not retain other folders in the Sites hierarchy such as HTMLSite, Preview, Archive, or SearchSite folders
- The list of page types available in the exported site is also retained
- All settings for all page types are retained for the exported site except where explicitly noted
- Page content is exported
- Only active and inactive pages are exported. Archived pages are not
- A page is exported regardless of whether or not it has ever been published
- HTML content and other page custom properties are exported
- Pagelet associations and content are also exported. This includes pagelets that have been hard-coded in to the template.
- All pages in the Syndication Manager identified as parents of any exported page will also be exported for later import.
- Digital Asset associations and digital assets on pages are also exported
- Digital asset categories necessary for the housing of digital assets being exported are also exported for later import.

- The sort order of child pages is retained as well as the sort order method (numeric or alphabetic)
- Exported pages do not retain workflow information
- Published version information is only exported for pages with an existing published version.
- Historical page data is not exported.
- Questionnaire-based pages (survey, application form) do not export questions or responses
- Personalization groups and assignments are not exported.
- Site-specific values other than those mentioned below are exported.
  - Publication information
  - Translation set information
  - User profile information
  - Metatag information
- System configuration information is not exported.
- Installation configuration information (Web.config, Ironpoint.config) is not exported.
- Global system variables are not exported

Once a site has been exported, a new site can be created by importing the exported site. All site ID references are adjusted for the new site and any other relative information is adjusted accordingly for the new site. You can import the site into the same ACM installation or into another ACM installation.

Exporting Existing Sites

The package generated from an export will be a .zip file using that standard format, and the import process will only accept a .zip file with the appropriate structure and files contained within.

To export a site:

1. Open the **Sites Manager**.
2. Edit the site you wish to export.
3. Click the **Export Site** button.
4. Click **OK** to continue, the system will prompt you to select a save location for the exported site file.
5. Click **Save** and select the save location.

The resulting .zip file can now be imported and used to create other sites.

Importing Sites

Importing of a site will be handled in a transaction context such that any failure in the action will result in a full rollback of the site and any other imported data out of the system.

All actions taken place during import will be associated with the current date and time and associated with an "ACM" username, linked when appropriate to the default administrator user.

To import a site:

1. Open the **Sites Manager**.
2. On the main **Sites Manager** screen, click **Import Site**.
3. In the **Package Location** field on the **Import Site** dialog, select the location of the .zip file that you exported.
4. In the **Site Name** field, enter a name for the new site. This is the name that will become the Home page of the new site.
5. Click **Import**. Once the site has been imported, a record of imported information is displayed.
6. Verify the imported material, and then click **Close**. The new site will appear at the bottom of your sites list in the Sites Manager.

Site Groups Manager

The Site Groups Manager will only be displayed if you are licensed for site groups and the extension has been enabled in the Ironpoint.config. Site Groups allow for the complete separation of sites within a single installation of ACM. It is intended for those customers who wish to provide their own Web hosting service for different groups within their organization such as faculties, student groups, branches, etc. For more information on Site Groups, please contact your ACTIVE Account Manager.

Mobile Device Manager

The Mobile Device Manager is only displayed if you are licensed for mobile and the extension has been enabled in the Ironpoint.config. The Mobile Device Manager is used in combination with HTML templates in the design package.

Export Manager

Used to create a remote HTML copy of a published ACM site, the export process is typically completed in three stages.

1. Modifying all paths in associated files. For example, JavaScript or CSS.
2. Generating an HTML file for each published page.
3. FTP files to the remote or local Website directory.

The export process is set in motion by a Scheduled or Unscheduled Export.

Scheduled Export

In order to keep site content, links and search results current, an export should be scheduled regularly. Be sure that you have already configured your site publication information.

To schedule an export:

1. Open the **Export Manager**.
2. In the **Scheduled Export** section, click the link beside "**Pages to Export**" to define which pages on your site should be exported. You can select the whole site or selected sections of your site.
3. Select the **Days** of the week to run the export.
4. Select a **Time** to export using the 24-hour clock. Schedule a time when web traffic is anticipated to be low.
5. Check the **File Deletion** checkbox to remove any old page or asset files from your web server during the export process. Archived or inactivated pages will be removed along with any non-ACM files that might be in the directory.
6. Click **Save**.

Unscheduled Export

Use this tool when it is necessary to export a portion or your entire site prior to the scheduled export.

To export a site:

1. Open the **Export Manager**.
2. Scroll down to the **Unscheduled Export** section.
3. Select the **Page(s) to Export**. You can choose to export your whole site or on specific sections of your site.
4. Check the **File Deletion** checkbox to remove any old page or asset files from your web server during the export process. Archived or inactivated pages will be removed along with any non-ACM files that might be in the directory.
5. Click **Export Now** to run the unscheduled export.

Unscheduled FTP

Use this tool to run an unscheduled FTP.

To run an unscheduled FTP:

1. Click **FTP Now** to run the unscheduled FTP.

Page Types Manager

The Pages Types Manger is where page types are added and configured for use on a site. Information on available Page Types is located in Appendix G – Page Types.

Configuring Page Types

Configure settings for each Page Type on a site-by-site basis.

To configure a page type:

1. Open the **Page Types Manager**.
2. From the **Managed Site** drop-down, select a site. The changes you make will affect this site only.
3. In the list of **Page Types**, locate the page type you wish to configure and click on the **Pagetype Name**.
4. Configure each of the page properties:
   - **Active**: Check this box to have the page type available on the site.
   - **Description**: The Description is displayed on the main page of the Page Types Manager.
   - **Include in Search**: Check this box to have this page type included in your search results. You may wish to uncheck this option for pages such as the Login page type.
   - **Show in Site Maps**: Check this box to have this page type display in site maps. You may wish to uncheck this option for pages such as the Login page type.
   - **Allow Static HTML Publishing**: This setting allows the page type to be published as an HTML file.
   - **Allow Page Previewing**: Most pages can be previewed but there are instances where you may not wish to allow page previewing. For example, Category page types cannot be previewed, they are placeholders on the section menu and do not have any page content.
   - **Allow Pagelets**: Check this box to permit pagelets to be inserted on any page created using this page type.
   - **Show Location Line Independent of Template**: The location line is normally positioned by the use of an IronPoint tag in a design template. However, if you want some page types to use location lines and others not, you would leave the tag off of the design template. When you check this box, the system inserts a location line above the main body of the page content.
   - **Show Child Links Independent of Template**: Child links are normally positioned by the use of an IronPoint tag in a design template. However, if you want some page types to use child links and others not, you would leave the tag off of the design template. When you check this box, the system inserts the child links automatically below the main body of the page content.

- **Include in child links lists**: When this box is checked, pages created using this page type will be displayed when configured to be included in the child link list (either through the Site Design Manager or edit mode of the parent page).

  Note If follow-up tasks have been disabled as either a system or site setting, the next two fields will not display in the page type settings.

- **Follow-up Task Options**: These settings determine which follow up tasks are available for the Page Type on the Workflow tab in full edit mode.
  If you do not include the "None" option, users will be required to set a Review, Inactive or Archive follow-up task.
- **Default Number of Days Until Follow-Up Tasks**: This setting controls the default number of days until a follow-up task is required. If you leave the setting blank, the page will use the setting from either the Site Variables or the Global System Variables. (For more information, see [Appendix C – Follow-up Tasks and Workflow](#).)

5. Click **Save**.

Adding Page Types

Add new page types to ACM on a site-by-site basis.

To add a page type:

1. Make sure the new page type file is in the directory where all of the page types are stored.
2. Open the **Page Types Manager**.
3. Click **Register Page Types**.
4. Click **Save**.

If the page type does not display in the list, go to the System Information Manager and review the Pagetype Extensions information to ensure the license was found and registered.

Deactivating Page Types

Make a page type unavailable for use on a site-by-site basis.

To deactivate a page type:

1. Open the **Page Types Manager**.
2. From the **Managed Site** drop-down, select the site to deactivate the page type on.
3. In the **Page Types** section of the page, locate the page type you wish to deactivate.
4. Uncheck the **Active** checkbox.
5. Click **Save**.

Repeat this procedure for each site you want to deactivate this page type on.

Activating Page Types

To reactivate a page type on one or more sites where it has been deactivated.

To activate a page type:

1. Open the **Page Types Manager**.
2. From the **Managed Site** drop-down, select the site to activate the page type on.
3. In the **Page Types** section of the page, locate the page type you wish to activate.
4. Check the **Active** checkbox.
5. Click **Save**.

Repeat this procedure for each site you want to activate this page type on.

Site Design Manager

Use the Site Design Manger to manage site design packages and customize page design details. Page Design Details include settings for applying Templates, Variable Values, and page visibility in Section Menus, Child Page Lists, Site Map, Search Results and Turning off Form Tags.

Site Template Package

Templates are downloaded, edited and then re-uploaded to ACM with images, CSS and specially formatted XML files to form the complete design package.

You can see the basic components of the design package in the following illustration.
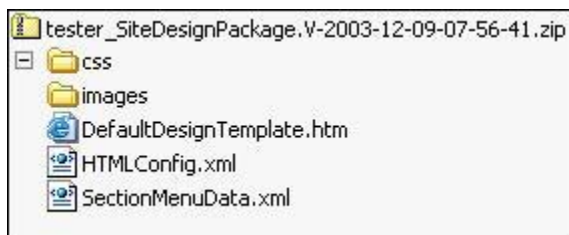
For complete instructions on editing the Design Package, refer to the ACTIVE Content Manager Design Guide.

Download a Template Package

Template packages are managed through the Manage Templates area of the Site Design Manager.

When a site is first created, a default template package is applied to the site and recorded as Version 1. In order to edit the template package, you must download the zipped package.

To download a template package:

1. Open the **Site Design Manager**.
2. Click **Manage Templates**. Make sure the correct site has been selected in the **Site** dropdown box.
3. Click on the **Version** of the template package to download. Usually the most recent version is downloaded (the one with the highest number).
4. On the **File Download** dialog, click **Save** and select the location to save the file to. You can save the package in any location, using any name you like.

For instructions on editing the Template Package, see the *ACTIVE Content Manager Design Guide*.

Upload a Template Package

Once Template Package edits are complete, upload the revised package to ACM.

It is important that the zip file contains the same hierarchy as it did when it was originally downloaded – otherwise, the application will be unable to find the files.

To upload a template package:

1. Zip the Template Package.
2. Open the **Site Design Manager**.
3. Click **Manage Templates**. Make sure the correct site has been selected in the **Site** dropdown box.
4. Click **Upload Template Package**.
5. On the pop-up window, click **Browse** to find your zipped **Design Package**.
6. Select the **Design Package** and click **Upload**.

You can now preview all of the templates in the package. If there is a problem, click **Cancel**; if not, click **Next** until you get through all of your templates.

You may also bypass previewing the templates by clicking Skip Preview after the first template has been previewed. This is only recommended if you have made changes to the template package that will not adversely affect the templates. When the preview process is bypassed, any errors in your templates will not be identified.

Edit Template Packages

Edits can be made to files in the template package though the ACM UI without downloading the template package. Any file can be edited except for JavaScript files.

To edit template files:

1. Open the Site Design Manager.
2. Click Manage Templates. Make sure the correct site has been selected in the Site dropdown box.
3. Click the Edit icon in the grid beside the most recent template upload to go to the Edit Template Package screen.
4. Depending on what file you wish to edit, use the dropdown to select the folder.
5. Click on the file name to edit it.
6. Once you have finished editing, you can preview the change in any page on the site.
7. Click Save to save your changes. You will be returned to the Edit Template Package screen.
8. There are two options for saving the template package.
   - Save All – this option will overwrite the existing site design package with the changes you just made. This option does NOT save a historical record of the template package before you made your changes
   - Save as New – this option will create a brand-new template package so you can roll back to the version prior to your recent edits.

Deleting Template Packages

Once you have uploaded more than one template package you have the ability to delete all previous packages. Deleting a template package will remove it from the template package list and delete the file from your server.

To delete a template package:

1. Open the **Site Design Manager**.
2. Click **Manage Templates**. Make sure the correct site has been selected in the **Site** dropdown box.
3. Check the **Delete** checkboxes of all the template packages you want to delete.
4. Click **Delete Selected Packages**.
5. When the warning appears click **OK** to continue or **Cancel** to return to the list of template packages.

Deleting a Template from a Package

If a template is no longer used on your site, you can delete it from the template package by removing the template entry from the site design manifest.

To delete a template from a package:

1. Open the SiteDesignManifest.xml document.
2. Remove the template entry by deleting the complete template entry:

```
<Template>
<ID>21</ID>
<Name>Template Name</Name>
<FileName>filename.htm</FileName>
</Template>
```

3. Save the SiteDesignManifest.xml document.
4. Deleting the template file is from the template package is optional.
5. Upload the template package following the directions above.
   - If the template whose entry you removed from the design manifest is assigned to any pages you will receive notice to return to the Site Design Manager and reassign the pages to a different template. A printable list of pages will be provided.
   - If the template whose entry you removed from the design manifest is not assigned to any pages, you will receive notice that continuing will remove the template(s) from the database.
6. If you need to add the template back into the package using the original template name, you need to add the full template entry, including the original template ID, to the site design manifest. This is due to the fact that the template is still maintained within the database for archived pages it is assigned to.

If you add the template back into the package, and don't need the original template name, create a new template entry as if you were adding a new template to the package.
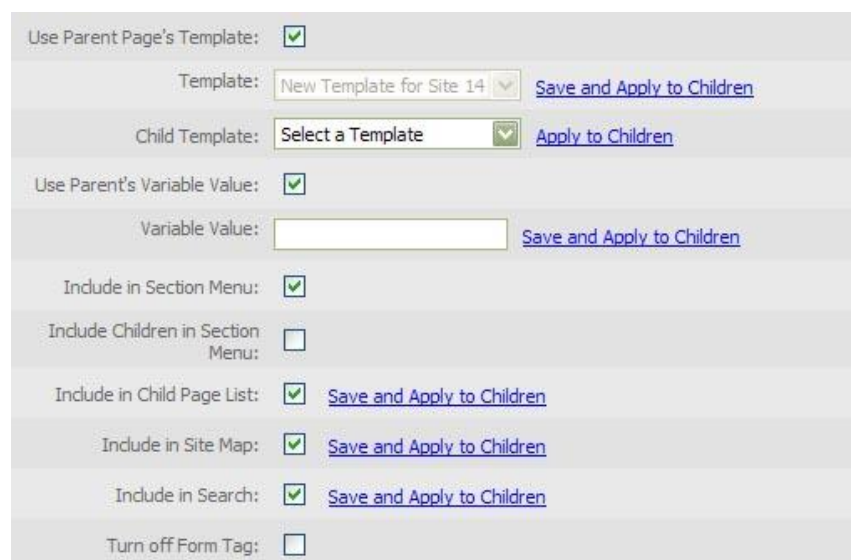
> **Note** Templates cannot be removed from the template package by deleting the template file only. Any attempt to delete a template from a package without it also being removed from the site design manifest will cause a system error.

Page Design Details

Page Design Details allow Site Design Mangers to apply settings on a page-by-page basis for Template Assignments, Variable Values; and page visibility in Section Menus, Child Page Lists, Site Map, Search Results, and Form Tags.

A user will not be able to change the settings of a page in the site design manager if the page is currently being edited by another user. The "(Edit)" hyperlink will change to display "(Locked for Editing)".

If a user, attempts to change the settings of a group of pages that includes a page being edited, a message will appear stating that the changes cannot be applied because pages in the group are being edited.

Assign Templates

To assign a template:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. **Use Parent Page's Template** is selected by default. Uncheck this box to assign a different template to the page.
5. In the **Template** drop down box select the name of the template to apply.
   To have all child pages of this page use the same template, click **Save and Apply to Children**.

6. To have the child pages of this page use a different template, select a template in the **Child Template** drop-down, and click **Apply to Children**.
7. Click **OK** when the confirmation window is displayed.
8. Click **Save**.

Assign Variable Values

Variable values allow Template Designers to embed Variable References in an ACM Template. When a page is rendered in ACM, the reference will be substituted with a page specific Variable Value as defined in this process.

For more information on working with Variable References, see the *ACTIVE Content Manager Design Guide*.

To assign a variable value:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. **Use Parent's Variable Value** is selected by default. Uncheck this box to assign a different variable to the page.
5. In the **Variable** field enter the variable name.
6. To have all Child Pages of this page use the same variable, click **Save and Apply to Children**.
7. Click **OK** when the confirmation window is displayed.
8. Click **Save**.

Include Pages in Section Menu

This option can be set at both a parent and child page level. When the first child page under a parent page is created, it will not automatically appear in the site's dynamic navigation.

Setting option for one page

To set an option for one page:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. Check **Include in Section Menu** if you want this page to show up in the dynamic navigation of the site.
5. Click **Save**.

Setting option for child pages

To set an option for a child page:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. Check **Include Children** in **Section Menu** if you want the child pages created under this page to appear in the dynamic navigation of the site.

All pages you create below this page in the hierarchy will now be included in the Section Menu of your site.

5. Click Save.

> **Tip** The "Include Children in Section Menu" flag identifies that all children and all *new* children will be included in the section menu. If you create a page and set this flag, then create five pages beneath it, all of them will also have the flag set.
>
> If you de-select the checkbox, the system doesn't make *any* modifications to the child pages. What happens, however, is that the sixth page created beneath it will *not* have the checkbox set and will *not* show up in the section menu unless someone explicitly goes in to set it as such (or re-checks the parent's Include Children... checkbox.)

Include in Child Page List

This switch allows you to show individual pages and their children in the Child Link lists that are generated with the <ironpoint>Childlinks</ironpoint> tag in the template, or on the General Content 2 page type.

To change this setting:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. Uncheck **Include in Child Page** if you do not want the page to appear in the list.
5. Click **Save** and **Apply to Children** if you do not want any of the existing child pages of this page to appear in a child page list. Clicking this hyperlink does not enforce the setting to future child pages.
6. Click **Save**.

This control was originally available only on a page-by-page basis on the Child Pages tab of Full Edit mode but was added to the Site Design Manger to centralize the control. If you still want to provide this functionality on the Child Pages tab, you must edit the IronPoint.config file to enable the Child List Column as shown below:

```
 <!-- Switch for enabling/disabling the ChildList column in the
pagetype Child Pages tab -->
 <!--WISEMETA: value="[IP_CHILDLISTCOLUMN]"--><featureExtension
id="ChildListColumn" enabled="True" isMenu="False" />
```

Include in Site Map

If checked, this checkbox will ensure that the identified page will appear in any site map created in the system by default.

- If this option is turned on for a page in the first level of pages (one step down from the home page), then it means that the page will have "Show top-level page only" selected by default on any newly created sitemap page.

- If this option is turned on for a page in any other level of page, it will only display if the parent page's settings in the sitemap allow it to be displayed. (For example, if the checkbox is selected but the sitemap settings for the parent are "Show top-level page only", then this page will still not be displayed on the sitemap.)

To change this setting:

1. Open the **Site Design Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. In the **Page List**, select a page by clicking **Edit** beside the page name. The **Page Design Details** dialog appears.
4. Uncheck the **Include in Site Map** if you do not want the page to appear as part of a site map.
    - If this option is turned off for a page in the first level of pages (one step down from the home page), then it means that the page will have "Do not show in sitemap" selected by default on any newly created sitemap page.
    - If this option is turned off for a page in any other level of page, it will not display even if the parent page's settings in the sitemap allow it to be displayed. (For example, if the checkbox is not checked but the sitemap setting of the page's parent is "Show all levels in sitemap", this page will still not appear in the sitemap.)
5. Click **Save and Apply to Children** if you do not want any of the existing child pages of this page to appear as part of a site map. Clicking this hyperlink does not enforce the setting to future child pages.
6. Click **Save**.

Include in Search

If you have created any Search pages that utilize the ACM search, all pages will by default show up in the search results.

- If checked, this checkbox will ensure that the identified page is not being restricted specifically from being searched.
- If this checkbox is checked but the page's page type has been identified as being unavailable for search, or there is any other reason why search is not enabled on the site, then the page will still be unavailable for searching.

To change this setting:

1. Open the Site Design Manager.
2. Make sure the correct site has been selected in the Site dropdown box.
3. In the Page List, select a page by clicking Edit beside the page name. The Page Design Details dialog appears.
4. Uncheck Include in Search if you do not want the page to be returned in search results.
    - Even if the page's page type is available for search, and all other settings on the site allow searching to be enabled, this specific page should not have a page generated in the SearchSite folder.

- This setting will not remove pages that have already been generated into the SearchSite when it is deselected but will only prevent future versions from being created.
5. Click Save and Apply to Children if you do not want any of the existing child pages of this page to be returned in search results. Clicking this hyperlink does not enforce the setting to future child pages.
6. Click Save.

Turn off Form Tags

This setting has been removed due to the form tag enhancement included with version 8.6 of the CMS. All subsequent releases will include this enhancement. Please see Appendix Q – Form Tags for details.

Meta Tags Manager

The Meta Tags Manager is used to create and apply Meta Tag questions to be used on the Meta Data tab in Full Edit mode.

Meta tag questions can be applied to a site by either using the default questions that have been set up in the Global System Variables, or by creating a question set specifically for a site.

These methods cannot be combined. You cannot implement the questions from the Global System Variables and add additional questions on a per-site basis.

Default Meta Tag Questions

To use the default meta tag question:

1. Open the **Meta Tag Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. To use the question set from the **Global System Variables**, check **Use Default**.
4. Click **Save**.

Site Specific Meta Tag Questions

To use a site specific meta tag question:

1. Open the **Meta Tag Manager**.
2. Make sure the correct site has been selected in the **Site** dropdown box.
3. To create questions unique to this site, click **New** and select a question type to add.
4. Complete the **Question Text**, **Type**, **Placement** and other question properties fields.
5. From the **Meta Tag Name** drop-down, select the appropriate metadata tag placeholder. Available meta tag names are: *Description*, *Keywords*, *Author*, *Robot* and *Custom*.
6. Click **Add Answer** to add each possible answer to the question (if required by question type).
7. Click **Update** to preview the question.
8. Click **Save**.

For more information on Meta Tags, see Appendix H – Meta Data.

For more information on editing questions and answers, see Appendix I – Question Editor.

Global System Variables

Global System Variables affect all of the websites created in ACM. Many of these variables can also be set at the Site level. For more information, see the Sites Manager section of this guide.

User Profile

Global User Profile questions are used to collect information on all users of ACM. Questions created here are displayed in the User Manager, on each user's My Page, and are available to be added to Applications Forms.

> **Note** Since these questions appear for every user in ACM, try to keep questions to a minimum to meet your required information needs. User Profile questions can also be created on a site by site basis.

Create user profile questions, referring to Appendix I – Question Editor for full instructions on creating questions.

Email

The emails listed on this tab are the default set of system emails provided with ACM. Each email is configured with default text that you can edit.

Email Column

This is the default name for the email. This name appears as the Subject line of the email when it is sent. The brackets at the end of the name show which groups will receive the email when the action associated with that email takes place.

Description Column

The Description column explains the action that triggers the email to be sent.

Active Column

The Active checkbox indicates whether or not the email is currently used in ACM. By deselecting the Active checkbox an email is made inactive and no longer sent. Ensure the appropriate parties are notified of any changes made to a global setting such as email.

Edit System Emails

To customize the body or subject line of an email:

1. Click on the **Email** name.
2. Edit the **Subject Line** and the text, add or delete variables in the body of the email.
3. Click **Save**.

Following is a list of variables you can use in the system event emails. Some variables are only available in the appropriate email templates. For example, Password will only be valid in the Forgot Password email, but Username is available in all.

- $ActiveUserFullName$
- $ActiveUserName$
- $ActiveUserEmail$
- <A href="$AdminURL$">$AdminURL$</A>
- $ApprovalEscalationDate$
- $ApprovalLevel$
- $ApprovalRequestDate$
- $ArchiveDate$
- $Email$
- $FinalApprovalLevelDate$
- $FollowupAction$
- $FollowupDate$
- $HomePageURL$
- $LocationLine$
- $MostRecentApprovalLevelDate$
- $PageContent$
- $PageStatus$
- $PageTitle$
- $Password$
- $PreferredFullName$
- $PublicationDate$
- $RegistrationDate$
- $RejectionDate$
- $ReviewEscalationDate$
- $ReviewRequestDate$
- $SiteName$
- $UserID$
- $UserName$
- $UserPhone$
- $WorkflowNotes$

System Variables

The system variables are set with default values:

Users are inactive when created

If your site provides an application form to apply for a user account but you want to approve new users, check this box. Users will have to wait until you approve them before they can access the site. If you don't need to approve new users, be sure to uncheck this box.

Number of login attempts before lockout

The number of times a user can attempt to login before the account is locked.

Disable follow-up task options

Check this box to disable the use of follow-up tasks within the ACM installation.

When follow-up tasks are disabled the ability to set a follow-up task on a page is removed. Content providers will be unable to set pages to be reviewed, archived, or made inactive.

Default number of days until follow-up task

Set the default number of days to reflect the period of time until a page needs to be reviewed.

Number of days until follow-up task is also a site setting, page type setting, and on the workflow tab of full edit mode of any page in full edit mode.

(For more information see Appendix C – Follow-up Tasks and Workflow.)

Default Follow-up Task

Choose the system-wide default follow-up task from three options: 1) Review 2) None or 3) Inherit. Any new pages created in ACM after the default value is set will automatically use the default value. If set to "Inherit" new pages will automatically inherit the setting of the parent page. Only the setting will be inherited, not the date of the follow-up task.

Number of days until escalation

If tasks such as approving or reviewing a page are not completed, an escalation email is sent to notify the appropriate groups that the task is outstanding. The escalation email is sent continually at this set period of time until the task is completed.

Number of days until escalation is also a site setting,

The maximum size of assets that can be uploaded to the system

If you want to limit the size of files uploaded into the Digital Assets Library, you can do so here.

There is also a maximum asset size setting in the Web.config file, which identifies the IIS acceptable input stream. If both are set properly, uploads are handled correctly. In some cases, the time-out period needs to be adjusted, such that users trying to upload particularly large files aren't timed out before the file completes uploading

Maximum levels in site menu

This setting controls how many levels of your website hierarchy are displayed from the Site Menu on the Admin toolbar. Setting this above one level can slow down ACM as the complete site menu renders.

Days before archive to warn

This setting establishes how many days prior to the automatic archiving of a page an email is sent to content providers and monitors to remind them of the action about to take place.

Maximum log level for database

This drop-down lists the priority levels of messages logged by the system. The setting determines what the lowest level of information is collected and available for viewing in the System Events area of the Admin Center.

If set too high, information required for troubleshooting will not be recorded. If set too low, log files will quickly fill to capacity will unnecessary information. CriticalInfo messages are the most critical and Verbose, the least.

The default level is Err - indicating that the log files will track system errors and other more critical events.

Maximum log level for email

Every time a system event occurs at the level indicated an email will be sent to the system administrator.

System-wide administration email address

This is the email address used as the "from" email address for system and broadcast emails; and receives notification email from the ACM system.

System-wide administration email name

Enter the name to be associated with the email address entered in the field above.

Enable workflow notes

Uncheck this box to disable the use of workflow notes within the ACM installation.

When workflow notes are disabled the pop-up window to enter notes no longer appears during the workflow process.

Enable edit lock

Check this box to provide the ability to lock down pages when they are being edited. By enabling edit locking, users will not be able to edit any content or settings of a page while another user is doing so.

Enable page owners

Check this box to enable the use of page owner groups within the ACM installation.

When page owners are enabled, administrators and group managers have the ability to create page owner groups, and content providers have the ability to assign a page owner to the page in edit mode.

Enable strong passwords

Check this box to enable the enforcement of strong passwords.

When strong passwords are enabled, new passwords must meet the specified criteria established in the following fields. If the password is not accepted, the user is informed why their password is unacceptable.

Strong password minimum length

Enter the minimum amount of characters a password must contain.

Strong password maximum length

Enter the maximum amount of characters a password must contain.

Strong password minimum alphabetic characters

Enter the minimum amount of alphabetic (A – Z) characters a password must contain.

Strong password minimum alphabetic characters

Enter the minimum amount of alphabetic (A – Z) characters a password must contain.

Strong password minimum numeric characters

Enter the minimum amount of numeric (0 - 9) characters a password must contain.

Strong password minimum numeric characters

Enter the minimum amount of numeric (0 - 9) characters a password must contain.

If the criteria is set or changed, any users who do not meet the criteria will not be forced to change their passwords, but the criteria will be enforced if they change their passwords.

Enable Edit Mode Tabs

As a system administrator you can decide what edit mode tabs are available in edit mode of all pages. Further restrictions can be applied on the group level. This setting allows you to control access to certain functionality. All tabs are enabled by default except for the Design tab.

Load All Child Pages in Edit Mode

If a page has numerous child pages, it can take some time to load in edit mode because it is loading the full list of child pages. This feature was added so that by default, you can choose to have pages load the list of child pages or not. De-selecting this checkbox will prevent the full child page list from loading in edit mode and will place a link on the Child Pages tab that will allow a content provider to display the list if they choose. This will increase overall edit mode performance when editing pages with many children.

App Variables

In version 8.9 and higher, the App Variables tab has been moved and renamed. It can now be found in the Configuration Files manager in the admin center under the Web.config tab.

Meta Tags

Meta tag questions created as Global System Variables allows you to create a standard set of questions for collecting Meta Data on any site created in ACM.

After creating the Meta Tag questions here, open the Meta Tag Manager and following the instructions in the Meta Tag Manager section of this guide to use the default Meta Tags.

Create Meta Tag Questions

To create meta tag questions:

1. Open **Global System Variables**.
2. Click on the **Meta Tags** tab.
3. To create questions, click **New** and select a question type to add.
4. Complete the **Question Text**, **Type**, **Placement** and other question properties fields.
5. From the **Meta Tag Name** drop-down, select the appropriate metadata tag placeholder. Available meta tag names are: *Description*, *Keywords*, *Author*, *Robot* and *Custom*.
6. Click **Add Answer** to add each possible answer to the question (if required by question type).
7. Click **Update** to preview the question.
8. Click **Save**.

For more information on Meta Tags, see [Appendix H – Meta Tags](#).

For more information on editing questions and answers, see [Appendix I – Question Editor](#).

Admin Toolbar

On this tab, you can configure the user greeting that appears on the Admin toolbar when a user logs in to ACM.

To configure the user greeting:

1. **To enable the user greeting, select the Welcome** User Enabled checkbox.
2. Enter the **Welcome User Text** that will precede the user's identity.
3. Select the **Welcome user type of address**. The options are *None*, *Firstname* and *Username*.
4. Click **Save**.

Support

On the support tab, you can configure the information that should appear in the Help > About ACM screen. These are the system wide settings and are superseded by the settings defined in the Sites Manger, Support tab. By default, the data is pre-populated with ACTIVE Network, LLC's support information. If you wish to offer your own internal support for your users, you can change this information here or at the site level.

Digital Asset Tags

Digital Asset Tags allow you to assign meta tags to your assets. This is useful in pages like the Media Center or Enhanced Photo Gallery where assets can be searched and arranged by tags. There are two options for asset tagging.

- **Text** – selecting this option allows your users to enter freeform text tags to digital assets.
- **List** – selecting this option allows you to add a predefined list of tags that your users will be able to choose from when tagging assets.
  - Click the **Add** button to add any number of tags that will be available for selection.

Objectionable Words

The Objectionable Words tab allows you to manage a list of objectionable words that will be filtered or replaced when your site visitors enter objectionable words in Blog Comments, Forums or in the comments pagelet (filters need to be activated on each page). The words are either removed completely or replaced with an alternate value of your choosing.

There are a number of predefined bad word list available online for download. Simply Google "Bad word list" for a number of options.

To manage objectionable words:

1. To manually add a word to your objectionable word filter, type the word into the provided text field and click **Add**. If the word is not already on the list, it will be added.
2. Choose your **Default Masking Character**. This character will be used to replace the letters of the objectionable word or phrase. The number of masking characters used will match the number of letters in the word. The default masking character is *.
3. If you wish to import a word list, you can import either a csv or txt file. Each word in the file must be on a new line. Click the **Import Word List** button to upload your word list. Your word list must not have any duplicates. Use Excel to filter your word lists for unique records only.
4. All of your objectionable words will be listed in a grid. You can change both the objectionable word and its replacement value in the grid.
5. To remove an objectionable word, check the box in the remove column beside the word you wish to remove.
6. Click **Save**.

Configuration Files

Web.config

The Web.config Settings are now accessible through the Configuration Files manager in the Admin Center rather than being accessible as the App Variables tab in the Global System Variables.

For a full description of all the settings in the Web.config, please refer to the ACM Install and Configuration Guide.

Support for Different Extensions with 404 Page

The ACM HTTP Handler (IronPoint.CM.Framework.Custom404HttpHandler) has been added to the ACM UI in the Configuration Files Manager on the Web.config tab. It can be used for any extension that has been added to the HttpHandlers section of the Web.config. The handler will send any request it handles to custom404.htm found in ACM's root folder on the web server.

Ironpoint.config

As of ACM version 8.9, the Ironpoint.config file is now stored in the database and is accessible through the Configuration Files manager in the Admin Center. If you have upgraded from a version prior to 9.0, please refer to the ACM Upgrade Guide for instructions on updating the database with the Ironpoint.config settings. Please refer to the ACM Install and Configuration Guide for full details of all settings in the Ironpoint.config.

ACM allows you to create Authority Redirects, 301 Redirects and FQDN Mappings. These settings can be configured in the Ironpoint.config tab located in the Configuration Files section of the Admin Center. These 3 settings take priority in the order mentioned. Examples of the new settings follow.

Authority Redirects

Multiple authority redirects can be configured and each one takes an 'authorityIn' and a 'targetAuthority'. Upon receiving a request, ACM will check the authority of the request URL to see if a redirect has been configured. If a match is found, it will rebuild the URL and do a 301 redirect. Using the example below, 'http://domain.com' would be 301 redirected to 'http://www.domain.com'.

AUTHORITY REDIRECTS		
AUTHORITY IN	**TARGET AUTHORITY**	**DELETE**
domain.com	www.domain.com	

Add

301 Redirects

Multiple 301 redirects can be configured, each taking a 'targetURL' and defining multiple semicolon delimited URLs that will redirect to the target. Upon receiving a request, ACM will see if the requested URL matches any of the 'Redirect301' path list URLs and perform a 301 redirect to the target URL. Using the example below, both 'http://www.domain.com/home.htm' and 'http://www.domain.com/site3.aspx' will be 301 redirected to 'http://www.domain.com/'.

> **Note** If Friendly URLs are not enabled for the site, the wildcard application configuration mapping has to be enabled in the Ironpoint.config in order for ACM to process redirects to URLs with no extension (such as www.mydomain.com/).

301 REDIRECTS		
TARGET URL	**PATH LIST**	**DELETE**
http://www.domain.com/	http://www.domain.com/home.htm;http://www.domain.com/site3.aspx	✗
Add		

FQDN Mapping

Multiple FQDN mappings can be configured, each requiring an 'FQDN' and a target page. This will allow a user to click or type in the 'FQDN' and see that remain in the address bar when the actual page is loaded. Upon receiving a request that contains only the authority or the authority and the virtual root, ACM will check if the request URL matches with one of the configured FQDN settings in the list of mappings. If one is found, much like a friendly URL mapping, ACM will rewrite the path server side to the specified target page. Using the example below, requesting (or getting 301 redirected to) 'http://www.domain.com/' will load the Home page while remaining 'http://www.domain.com/' on the address bar.

> **Note** The wildcard application configuration mapping has to be enabled in the Ironpoint.config in order for FQDN Mapping to work if Friendly URLs are not enabled for the site. If neither Friendly URLs nor wildcard mapping is enabled, ACM will not process requests that are sent to URLs with no extensions (such as www.mydomain.com/).

FQDN MAPPINGS		
FQDN	**TARGET PAGE**	**DELETE**
http://www.domain.com/	Home Page	✗
Add		

Default.aspx

In the root directory of the ACM installation there is a default.aspx file. This file is used to redirect IIS to the correct Site ID. For example, the following is what is included in this file by default.

```
<% Response.Redirect("~/site3.aspx") %>
```

If www.mysite.com was typed into web browser, the following would be returned back into the address bar: http://www.mysite.com/site3.aspx

If there are two URLs or domains that are going to be used to access two ACM websites, the default.aspx file will need something similar to the following VB.NET code in it to recognize which address is to be directed to which Site ID.

```
<%
dim strURL as string = UCase(Request.URL.tostring)

If InStr(strURL, UCase("www.WebSiteOne.com")) > 0 then
Response.Redirect("~/site3.aspx")

elseIf InStr(strURL, UCase("www.WebSiteTwo.com")) > 0 then
Response.Redirect("~/site4.aspx")

else
Response.Redirect("~/System/Error404.htm")

end if
%>
```
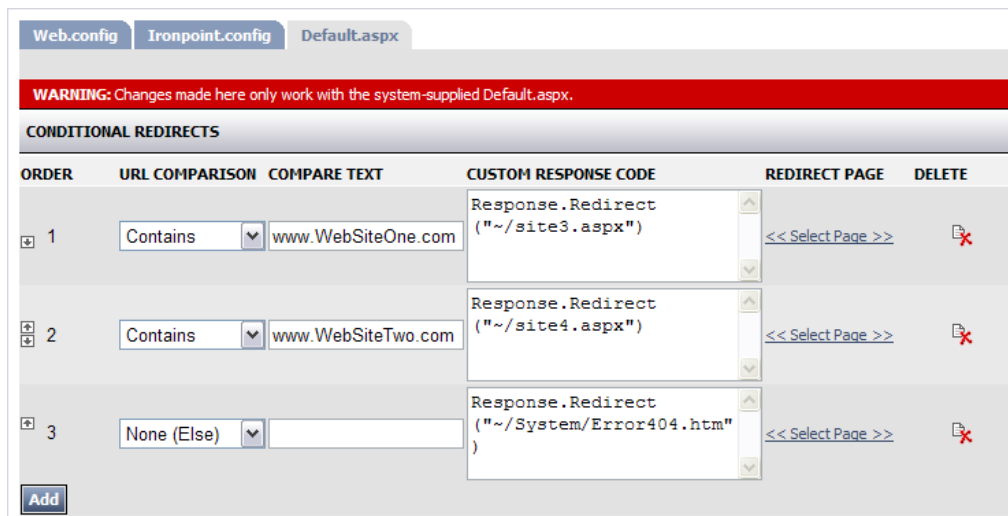
In the above code snippet the first website www.WebSiteOne.com is redirected to Site ID equal to 3. The website URL and the Site ID can be changed as appropriate. There are many ways to achieve this using VB.NET code, the above is simply one example.

> **Note** Do not add directories onto the address path. They are not needed.

The Default.aspx can also be managed directly from the Admin Center of ACM as well. Browse to the Configuration Files screen and select the Default.aspx tab. Note the warning that these setting will only work if you are using the system default.aspx, not the ironpointdefault.aspx. The example below will have the same result as editing the default.aspx file directly.

Additionally, if you know what page you would like the **www.WebSiteOne.com** to load, you can exclude the custom response code and simply select the page in the redirect page column.
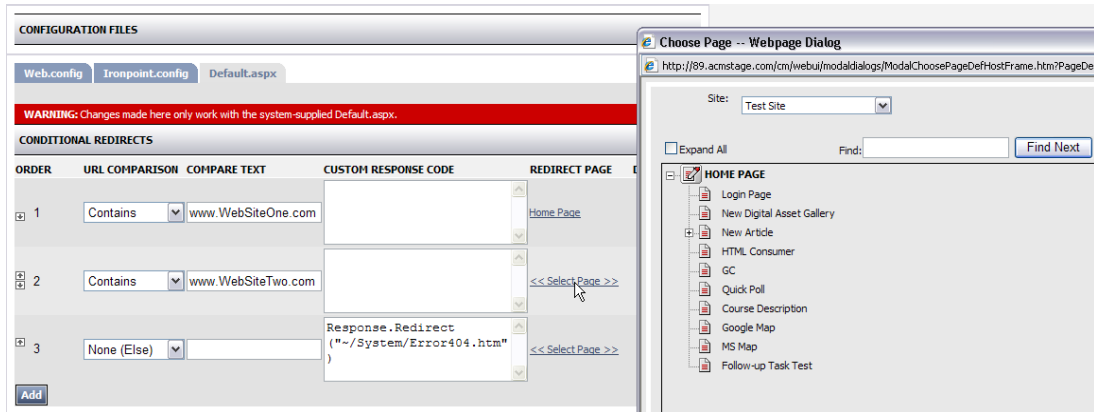
System Events

The System Events Manager provides access to system log files and is used by system administrators and ACM support staff to track system events and troubleshoot system errors.

This is the first place to look after a system error has occurred. You can locate details regarding the event and provide ACTIVE with this information when reporting the issue.

> **Note** You should not change the default settings for the System Event Manager unless you have consulted with ACM support staff.

Filtering Log Messages

You can select which logs to view, and you can filter by level of severity, site, host, category, and date.

Clearing Log Messages

You can use one of three buttons to clear log messages:

- **Clear Selected Logs**: Clear the log messages that have been selected in **Available Logs**.

- **Clear All Logs**: Clear all log messages regardless of which have been selected.

- **Clear All Logs Before**: Pick a date to clear all log messages older than the date.

Displaying Log Messages

In the **Grid Setup** field, select the number of rows to display per page.

The default maximum of rows to return is 1,000. You can change this value in **Configuration Files** > **Ironpoint.config** tab > **System Events Read Limit** field.

To view a log message in detail, click the date/time value in the grid. You can delete a log message after viewing it.

System Information

System Information is used by System Administrators and ACM support staff to troubleshoot system issues and errors. To view each sub-section, click the "+" symbol in front of the sub-section title.

Framework Software Version

Information related to the installed version. This includes the Build Version, Build Time, Assembly Version, Last Database Script Executed and Licenses.

Page Type Extensions

A list of all page types available in the software, the version of the page type, and the License and Registration status of each page type as related to your installation.

Web Server Information

View Tracing Information: Provides information on the trace of where you connect from, etc. By default this option is not enabled.

View Session Objects: Displays the Session Key and Data Type contents of the ASP.NET application session.

Job Queue Status

Identifies all system jobs that are scheduled, queued, in progress, completed and the total of all these jobs. Completed jobs are cleared at regular intervals.

Cache Status

Provides information related to ACM caching. Displays how much memory is used by cached items, the accuracy rate and average requests.

View Cache Contents: Shows you cached contents and allow you to remove any one item.

Pre-Cache Site: Allows you to cache site contents of a new site, or after clearing site cache. If this tool is not used, the first user has to wait for the site to load into cache.

Clear All Items: When part of the site will not update correctly (for example a template change) it is recommended to clear the cache to ensure old files are not being referenced.

Reset the Cache Counters: When you want all the items in the Cache Status table to be reset to zero.

Tools

Provides a link to tools and utilities available in ACM.

Database Tools

Clear All Log Entries: Clicking the "Clear All Logs" button provides an easy method of clearing all the log files that are available in the System Event Manager.

Delete Page and All Children: Entering a page number into this field and clicking "Hard Delete" will remove a page and its child pages from both your site and the database. Performing this action means there is no longer a record of this page and it cannot be restored to your site.

Re-index HTML and asset/page paths: This tool goes through and repairs any custom properties on a page. For example – properly associating digital assets with pages. (Only valid for pre-7.2 sites)

Import/Export Configuration

Provides the functionally to import an existing static site into the ACM software and should only be used with the assistance of an ACM developer.

Export HTML Management

Delete HTMLSite Folder: If you export a site to HTML (static site) your files get generated inside an HTMLSite folder. If you experience problems with your static site page versions, it is sometimes recommended to delete the HTMLSite folder to ensure your files are being generated correctly.

Delete SearchSite Folder: The search pages for sites (dynamic and static) are generated to a SearchSite folder. At this time, ACM does not remove archived or inactive pages from the SearchSite folder. In order to update the search results for your site it is recommended to delete the SearchSite folder on a regular basis (prior to a site export) to ensure pages are not returned in searches that are no longer part of your site.

HTML Editors

In order to use additional editors within ACM, you must register them for use. Some external software applications may require that you own a license for them.

When you click the Register HTML Editors button, ACM will locate the editors you can currently use. Note that as of the 12.0 installation this will only confirm your use of the Plain Text Editor, RadAjax Editor, and TinyMCE Editor.

See the [Group Manager](#) section in this guide for more information on assigning HTML editors to user groups.

Browser Information

Browser information can be a useful tool when troubleshooting User problems that may be related to cookie or JavaScript settings. Check this report from the user's computer to confirm if cookies and/or JavaScript are enabled on their browser.

Web.config Settings

The Web.config files are installed at the root of ACM installation and contain a number of settings for the software to work correctly. This area allows you to verify those settings without having to open them directly on the server.

As some of this information contains User Names and Passwords, you are provided with the ability to Encrypt and Decrypt the Web.config settings. This requires an additional external module; see the *ACM Installation and Configuration Guide* for more information.

Ironpoint.config Settings

The Ironpoint.config files are installed at the root of the ACM installation and contain a number of settings for the software to work correctly. This area allows you to verify those settings without having to open them directly on the server.

PhysicalPath Settings

This information allows developers to verify where directories and files for the ACM application and sites are located on the server.

View Active Sessions

This section allows you to view any users that are logged in to the system, what page they are currently viewing and the mode of that page (view or edit). If two users are editing the same page, an alert will appear in the grid. To activate this section you must set the following value in the Web.config file to true:

```
<add key="EnableActiveSessionsTracking" value="True" />
```

ACM Glossary

Action Menu

The action menu is available only when you use the Quick Edit mode to edit your web pages. The button appears beside the edit buttons beside the page title. The action menu includes: publishing, previewing, saving and canceling functionality.

Archive

When you archive a web page or a survey/form question, you permanently remove the item from your website. If you want to keep a web page or question but have it not be visible on your site, you must deactivate the page or question by un-checking the Active checkbox.

Category Pages

Use category pages to create drop-down menus in your site's navigation area. The category you create appears as a link on the navigation pane and when you click on it, a list of pages that the user can go to are listed in the drop-down menu. The pages that the user can go to are the child pages of the category page. Using this page type adds an additional navigational tool for users of your site.

Child Links

Child links refers to the links that appear in the main content area of a parent page once it is published. The list of links, which generally appears at the bottom of the page content, provides links to each of the child pages created under that parent page. The child links area is created through an IronPoint tag added to your template.

Child Pages

Child pages belong to a parent page and appear on the Child Pages tab of the parent. Child pages can be created for all page types with the exception of the Login pages. It is not recommended that you add child pages to Login page types.

Content Approvers

Content approvers are users who have been given the rights and the responsibility for approving page content created by other users. Content approvers are part of the workflow of creating and publishing pages. Once a page is created and saved, it gets submitted for approval. The Content approver can then approve or reject the pages.

Content Editor

A content editor is a user within your organization who has been given rights to edit content that others have created.

Content Management System

A Content Management System (CMS) is software empowers users across an organization to create and publish content in an organized and timely fashion. A CMS makes content management easy by allowing non-technical, front-end content providers to create, edit, publish and maintain pages, sections or entire sites, depending on the needs and size of the organization. Content management systems keep design and content functionality separate which facilitates easy changes to the design of your website.

Content Monitors

Content monitors are people within your organization that receive notification when certain content has changed. Monitors are generally responsible for monitoring portions or all of the website changes. They do not necessarily contribute to the content but simply receive notification to be kept apprised of changes to the site.

Content Providers

Content providers or content authors as they are sometimes called, are users who are authorized to create web page content. Content providers can create content only in the areas to which they have been given access by the system administrator.

Digital Assets

This refers to photos, clipart, PDF, audio, video and other types of files that you can insert on or attach to your web pages. Digital assets are stored in the digital asset gallery which is a library of files available for use on your website. Only authorized users can add digital assets to the library for use on the website.

Dynamic Publication

Dynamic publication exists when the published version of your website integrates with the ACTIVE Content Manager. The other option is static publication in which the website content is maintained in one location, then a copy of it is exported to another server and made available on the Internet.

Follow-up Task

Each page must have a follow-up task. The follow-up tasks available for most page types are Review, Inactive, Archive or None. The date by which the follow-up tasks must be completed are entered on the Workflow tab for each page. Your system administrator can set default follow-up dates to ensure pages will be reviewed at appropriate intervals.

Hybrid

There are some page types that interface with the software database in order to pull information from or save information to the database. If you have a static site these pages are considered to be "Hybrid" pages and are identifiable by "PageMode=Hybrid" at the end of the page address. The Login and Survey page types are two examples of a hybrid page type.

My Page

My Page is your personal information and user preferences page. You work from My Page when making changes to your web pages. On My Page you can view your personal information and rights and change your password. My Page can be set to be your default home page upon login.

Navigation Section

The navigation section of your website is the portion of your site, usually found on the left-most side of each web page, which contains the menu structure for your site or the navigational links that allow you to jump to other areas of the site. Some websites place their navigation section along the top of the main content area in a horizontal menu-like fashion.

Page Types

Page types are formatting functionality that defines how the central content area of each page will look. There are a number of standard page types included the standard ACM installation. Page types provide standard formatting for creating the content for login pages, general content pages, links and attachments, forms and surveys, photo gallery pages, user account application pages, and more.

Pagelets

If there is content that is used repeatedly throughout your website, you can create a single instance of the content that can then be used over and over throughout your website. These single instances are referred to as Pagelets. They are like mini-pages, hence the name "pagelets".

Parent Pages

A parent page is any page within your website that has pages below it in the website hierarchy (there are pages on the Child Pages tab). When adding web pages, you need to determine where in the hierarchy the new pages will be. You then edit the parent page and add them on the Child Pages tab.

Section Menu

Section menus provide links to other major content areas within your site. You can add section menu links to other pages or attachments. The links appear in the navigation portion of your web pages, usually on all pages throughout your site.

Static Publication

Static publication exists when your organization maintains two copies of your website, one on a server that is used for creating and editing content, and another that is used for your public website. When the site is edited in ACM, those changes do not appear on the website until the page is either emergency published, or the site is exported.

Syndication

If there is content that is used repeatedly throughout your website, you can create a single instance of the content and then syndicate it, making it available for use on any page

throughout your website. Rather than retyping the text each time it is needed, it can be syndicated (made available for use in multiple places) using the Pagelet feature. If the text is later updated, it is changed automatically wherever it occurs.

Templates

Templates define how the header, footer, navigation and other features of a site are designed. By assigning templates to site pages consistency is maintained across the site.

Workflows

A workflow consists of a number of steps required to successfully complete a task. In ACM, workflows are used to ensure that your web pages go through a number of predefined controlled steps that ensure they will be edited, reviewed and approved before being published on your website. Workflows are generally maintained and assigned to pages by a small group of authorized users within your organization.

Appendix A – Static Sites

Be aware of the following when deciding to export to a static site:

HTML file names - the name entered in the URL Title field of the page is the name that is used for creating the HTML file name. If this field is left blank, the Title field of the page is used to create the HTML file name. This is also true for Dynamic sites that use Friendly URL's.

Links - there are aspects of internal links that are important to understand. One thing to note is that if you export a single page, the links on that page get updated but pages that contain links to the exported page do not. For more information, see Appendix E - Links.

Digital Assets - in addition to pages, the system also exports digital assets that are used by the exported pages.

Emergency Publishing - when you emergency-publish a page, it is instantly exported to your static site. However, links pointing to that page, dynamic menus, and site search are not updated and may be outdated by edits made on the emergency published page. Other features are not updated until a full site export takes place, either by way of your export schedule for by an unscheduled complete site export. The only exception to this rule is that if a page has pagelets attached to it, they too are exported.

Partial site export - the Export Manager allows you to select a page and its children to export. If you export a portion of your site, the dynamic menus and site search will not be updated. Again you must perform a complete site export for these to be updated.

Scheduled and unscheduled exports - you can set your system to perform a regular site export. When these scheduled exports occur, all aspects of your static site are updated. Unscheduled exports can include partial or complete exports. Complete exports update all aspects of your static site (menus, search and templates). Partial exports update only the content of the pages that are exported.

Hybrid pages - Pages, such as the Survey and Calendar pages, that require user and ACM database interaction, are not fully converted to HTML. When the user clicks on a link to one of these page types, the HTML file that was created with the export actually redirects them to the dynamic version of the page. These types of pages exist across the static and the dynamic environment - hence the name "hybrid".

Appendix B - Group Types

ACM is installed with some default groups set up in the Group Manager. Use these groups as examples when setting up your groups.

System Administrators

System Administrators have complete administrator and publishing rights to the entire ACM installation. This user group cannot be deleted or modified.

The System Administrator:

- Can view and use all administrative tools
- Acts as a reader, regular user, developer, design coordinator, group coordinator, asset coordinator, user coordinator, and workflow coordinator in all sites.

Designers

Site Design Managers are responsible for creating and maintaining the Design Packages for all websites in ACM.

Using the Site Design Manager, Site Design Managers can:

- Download and upload site design packages
- Assign templates
- Assign variable values
- Set page visibility in Section Menus, Child Page Lists, Site Map and Search Results.

Content Providers

Content providers are authorized to create and edit page content. Content providers can create and edit content only on the pages to which they have been given rights.

Content Approvers

Content Approvers have the rights and responsibility for approving the work of Content Providers. Content Approvers can approve or reject content only on the pages to which they have been given rights.

Content Monitors

Monitors receive notification of a number of Workflow processes. Monitors monitor pages to which they have been given rights, but perform no actions, unless the User has been given additional rights though being a member of another Workflow group.

Appendix C – Follow-up Tasks and Workflow

When a page has been published, the next process it will undergo is dictated by the follow-up actions (Review, Inactive, Archive or None) set on the Workflow tab in Full Edit mode. As of version 8.9, the default follow-up task is defined by the system setting in the Global System Variables. The default will either be Review, None or Inherit where a new page will automatically inherit the workflow task of the parent page.

Review

Scenario 1 – Page is published with a review date and edited

As of version 8.9, the scheduled review date is a rolling time period that is reset each time a page is edited. Therefore if you create a page on January 1 and have it set to be reviewed a year later, editing the page prior to the review date will reset the date to one year from the date of editing.

Scenario 2 – Page is published without a review date and edited

If a page is created and not set to be reviewed, the default date will continue to move forward according to the follow-up time period in the system settings. Therefore if you create a page on January 1 and do not set it to be reviewed, then edit it on February 1 and decide that it will be reviewed a year later, the page will reach its review period a year later on February 1.

A page is reviewed by opening a page in Edit mode and either clicking Reviewed – which will set a new Review date, or by clicking Edit - making changes, and putting the new version through approval.

Inactive

When a page has an Inactive follow-up task it will no longer appear on a dynamic site at the date and time setting for this action. Once a page is inactive it will remain on the child page list of its parent page. All dynamic navigation links to the page will be removed, such as dynamic menus, navigational trail, etc. Links manually created to a page, must be manually removed.

If a site is published to a static location, an inactive page will remain on the static site until the next publication time.

Archive

When a page has an Archive follow-up task it will no longer appear on a dynamic site at the date and time setting for this action. Once a page is archived it does not remain on the child page list of its parent page. All dynamic navigation links to the page will be removed, such

as dynamic menus, navigational trail, etc. Links manually created to a page, must be manually removed.

If a site is published to a static location, an archived page will remain on the static site until the next publication time. For more information about un-archiving a page, see the Archive Manager section of this training guide.

Follow-Up Task Settings

The follow-up dates as they appear in full-edit mode are different depending on the follow-up task set:

If a page has "None" as the setting, the review date moves forward through the period as set in the Global System Variables, Site Manager or Page Manager. When you create a new page, if your follow-up period is 90 days, the date visible will be 90 days later. When that page is edited, the date will move forward by 90 days.

If a page is set to be "Reviewed", the review date moves forward through the period as set in the Global System Variables, Site Manager or Page Manager. When you create a new page, if your follow-up period is 90 days, the date visible will be 90 days later. When that page is edited, the date will move forward by 90 days.

If you change the review period setting from 90 to 180 days, any pages currently set to be reviewed will retain the original 90-day setting. They will only change to the 180-day period after being edited or reviewed.

Appendix D – Page Versions

There are, at most, two current versions of a page: the Published (live) version and the version in the Approval process.

Only one current Draft version of a page exists, when a change to a Draft version is saved, no new version is created — users cannot roll back to previous draft versions. A page version can be approved and pending publication (not yet published) if a future publication date is set.

Once submitted, a page is pending approval until it is either approved, rejected or is emergency published during the approval process. If a page is rejected, a new version is created (a copy of the last workflow version) with draft status. If an Approver makes a change to a page, the page is resubmitted for approval at the current approval level.

While a page is in the approval process, only Approvers at the current level or System Administrators can open a page in edit mode. Other users see a No-Editing icon on the front end with a Pending Approval status message.

When a page is Pending Publication, only System Administrators can access the page in Edit mode. Others see a No-Editing icon with a Pending Publication status message.

The ability to publish is only available to Providers when the Workflow has no Approvers. Otherwise, Providers must submit pages for Approval.

Monitors are not able to access Edit Mode of any pages. They only receive email notifications about Workflow processes.

New pages that have not yet been published and inactive pages are accessible only from the Child Pages tab in Full Edit mode of the parent page. The Child Page table lists all child pages that are currently in workflow, even if there is no current published version.

Page Statuses

- Draft
- DraftNoApprovers
- DraftHasApprovers
- PendingApprovalLevel1
- PendingAprovalLevel1EditClicked
- PendingApprovalLevel2
- PendingAprovalLeve2EditClicked
- PendingApprovalLevel3
- PendingAprovalLevel3EditClicked
- PendingApprovalLevel4
- PendingAprovalLevel4EditClicked
- PendingApprovalLevel5
- PendingAprovalLevel5EditClicked

- PendingApprovalLevel6
- PendingAprovalLevel6EditClicked
- PendingApprovalLevel7
- PendingAprovalLevel7EditClicked
- PendingApprovalLevel8
- PendingAprovalLevel8EditClicked
- PendingApprovalLevel9
- PendingAprovalLevel9EditClicked
- PendingApprovalLevel10
- PendingAprovalLevel10EditClicked
- Rejected
- PendingPublication
- PendingPublicationtEditClicked
- Published
- PublishedReviewDue
- PreviouslyPublished
- Archived

Appendix E - Links

There are a number of ways to create links within ACM.

Content Links

Links within your page content are made using the Content Editor - Link tool.

Links created in the content editor window:

- are displayed as a part of page content
- cannot be displayed on the section menu
- can be internal or external links

Child Page Links

Each Parent page will display a list of Child Page titles in the assigned location (as set in the templates); can also be set to include page summary/teaser information.

Section Menu Links

Section menus will display a list of Child Page titles reflecting the order from the Child Page table. Child Pages appear in the section menu using the Page Design Detail settings from the Site Design Manager.

Navigation Links

Some of the ACM page types are used specifically to create a method of navigation:

Link Page Type

Used to create a link to internal or external pages that can have a number of different properties and characteristics. This link can be visible in both the Child Page list and Section Menu.

It is good practice to not create child pages under a link page. The purpose of the link page is simply to take the user to a different site or page within a site. If you want to create a sub-menu type link on the Section Menu, use the Category page type.

Links created using the Link page type:

- Are often used to create a menu link to a page in a different section of the website.
- Can force one or more popups to be displayed and accepted or rejected by the user prior to proceeding to the linked page (e.g. if you want a user to read a disclaimer or license agreement prior to reaching the linked page). Only from a child page list.
- Allow you the option of displaying a popup containing additional descriptive information about the link. Only from a child page list.

Attachment Page Type

Used to create a link to Digital Assets that can have a number of different properties and characteristics. This link can be visible in both the Child Page List and Section Menu.

Links created using the Link page type:

- Allow you the option of displaying a popup containing additional descriptive information about the link. Only from a child page list.
- Allow you to display size, type and icon associated with the Digital Asset. Only from a child page list.

Category Page Type

Use to create a section menu place holder. This page type does not display content but provides a method for grouping child pages of similar content. This link is not visible in the Child Page List.

Quick Links Page/Pagelet

The Quick Links page type is the most flexible link-building feature available in ACM. It allows you to build a page of different kinds of links from different sources. This is useful for creating lists of News items or What's New links on your site.

Links created using the Quick Links page type:

- Are displayed in the order you specify, in between the Introduction and Conclusion text.
- Cannot be displayed on the section menu.
- Can include internal and external links.
- Can be a combination of any number of child links from one page with any number of child links from another page.

  Note The standard ACM installation does not include the Quick Links page functionality. If you would like more information about this page type, contact your ACTIVE sales representative.

Appendix F - Personalization

Personalization is a tool for restricting pages to specific users or groups. Personalization will only work in a dynamic environment. You may add a login page within your static site for visitors to access personalized content, but the personalized pages will remain within your dynamic URL.

Personalization only works within a dynamic environment due to its reliance on database interaction. If Personalization is used in a static environment it will forward site visitors to the dynamic site location.

Site Personalization Options

A site that is for the public viewing should have personalization set to "None" – this allows ACM to skip user authentication checks and serve pages more quickly. A site that requires personalization means that no page on the site is accessible without first authenticating the user.

Page Personalization Options

Page personalization is set in the Personalization tab of Full Edit mode. A page can be set to use its Parent page personalization settings, or the page can have its own personalization settings by changing the group who will be able to view the page.

User Group

A Personalization group must be created in the Group Manager in order for users to access restricted areas of a site. Check the option Make available for External Applications and PageTypes if you want the group to be available in Custom Group questions.

Application Form

To allow site visitors to apply to view restricted areas of a site, an Application form must be provided.

Appendix G - Page Types

ACM includes the following page types (some of these page types are not standard page types and must be purchased). For detailed information on page types see the online help.

Application Form

The Application Form page type creates a form used to apply to become an authorized user of a site. The Application Form page type automatically includes a number of fields that collect user information.

Article

The Article page type provides you with the ability to create content pages using standard field and layout elements. Users are provided with fields to enter authors, dates, sources and images with a by-line. Included is the flexibility to format articles in different styles, customizing them to your needs using advanced layout options.

Article Index / Syndicated Article

The Article Index page type comes packaged with the Article page type and can be used for both article pages and syndicated article page. For the Article, it can act as a parent page where a user can define how many of the latest articles should be listed. The page provides search functions and references the same categories used in edit mode of the Article page. For Syndicated Article pages, this page becomes the container in which the content is rendered.

Article Submission

The Article Submission page type allows for anyone visiting your website to submit editorial content for your review and, if you approve, posting as an Article page. Articles of various categories can be sent to various groups within your organization for approval and publication. It allows your community of website visitors to add to your site.

Attachment

The Attachment page type creates a navigation link to a digital asset. This link can be displayed in your section menu or child page list.

Blog/Blog Entry

The Blog and Blog Entry page types provide the functionality for creating a blog (weblog) and adding comments to it. The Blog is the root page for customizing the blog; this is where the settings for customizing the layout, and comment moderation/display are set. Each Blog Entry is then displayed on the Blog page according to the entry settings.

Blog v2

The Blog v2 page type has many features of the web's leading blog engines. It allows blog entries from many contributors, organizes blog posts by topic or tags and allows a visitor to search by author, topic, tag or keyword. It also supports email and RSS subscription for

each option so a user can be notified of any new blog posts by author, topic or tag. Flexible layout and design allows you to customize the look of your blog to match the rest of your site.

Calendar / Calendar Event

The Calendar page type and the Calendar Event page type create a calendar and the event pages to be displayed within the calendar. The calendar can be displayed in a graphical or text-only format. Page features include allowing visitors to add, edit and delete events. To be displayed on the calendar, child pages must be created with the Event page type.

Case Management

The Case Management page type provides for easy case entry, routing of cases to appropriate staff, and management of ongoing cases. Cases are routed and managed based on categories that you create. The page allows you to view cases on desktops as well as on mobile devices.

Once you have configured the Case Management page, users can create and submit cases which can be automatically assigned to a specific group or individual for handling. Users can retrieve cases to view their status, update particulars, comments and documentation. Cases can also be reassigned as needed and closed when completed.

Category

The Category page type creates a navigational "place holder" in a section menu. The Category page title appears in the menu but has no content. The pages the user can visit are the child pages of the Category page.

Club Listing

The Club Listing page type allows you to set up pages where users can create club listings for their own clubs. Public users can create and manage clubs, ca club calendar with events and a club discussion forum. The club feature allows clubs to post news stories, upload photos and attach documents. Visitors can view, join the club automatically or by invitation.

Comments Pagelet

The Comment pagelet allows viewers of your page to comment on the contents of the page. The same pagelet can be used on multiple ACM pages to allow a page viewer to comment on the page's content. All the comments collected by the pagelet from all pages on which the pagelet resides can be managed from edit mode of the pagelet. However, only the comments submitted for a particular page will be displayed in the Comments pagelet on that page. Comments can be recommended by other viewers and can be sorted by the number of recommendations they have received.

Course / Course Search

The Course and Course Search page types provide the functionality for an organization to maintain a course or program listing.

Club Listing

The Club Listing is a page type that provides a way for a web site administrator to setup a portion of the site where users can create club listings for their own clubs. Public users can create and manage clubs, a club calendar with events and a club discussion forum. The club feature also allows clubs to post news stories, upload photos to the club page and attach relevant documents (forms, registration information, etc.). Once a club has been created, visitors can view and join, either automatically or by invitation.

Digital Asset Gallery

The Digital Asset Gallery page type creates a list of non-graphic digital assets. By indicating which folder(s) in the Digital Assets Library will be used, only assets in the designated folder(s) are listed.

Dynamic Layout

The Dynamic Layout page type provides an easy way to layout page headlines and content without needing extensive HTML knowledge. Content providers can easily add, re-order and delete pages from a dynamic layout. The page includes the flexibility to format layouts in different styles, customizing them to your needs using advanced layout options.

eCard

An eCard is similar to a postcard or a greeting card with the primary difference being it is created using digital media instead of paper. The eCard page type will allow a website visitor (the eCard sender) to choose from an online catalog of "cards". After selecting a card, the sender can personalize it by adding a message. Finally, the sender specifies the number of recipients and their email address and the website delivers the eCard within an email message on behalf of the sender to the recipient.

Content providers have the ability to select and order the images to appear for selection on the eCard and customize the text that will prompt the user throughout the card creation process.

Email Updates

The Email Updates page type provides site visitors with the opportunity to self-subscribe and unsubscribe to emails when the page(s) they've subscribed to are updated. Subscribers receive an email with a list of page links for updated and new pages with the date and time of the update.

Enhanced Photo Gallery

The Enhanced Photo Gallery page type is meant to take the best features from each of the existing Photo Gallery and Flash Photo Gallery page types and combine them with a whole new set of added functions to make the page more flexible and the output more configurable.

Facebook Wall

The Facebook Wall page type allows you to create a page in your ACM that accesses your Facebook account so that you can display your news feed on the Facebook Wall page.

FAQ

The FAQ page type allows users the ability to add FAQ question and answer pairs to the system. This page type works as a container for all page types and provides various design options to display its child pages. Question and answer pairs may be dynamically anchor linked so that a user can link to a specific question or answer without having to scroll.

Flash Photo Gallery

The Flash Photo Gallery page type allows you to display images in an album or slide-show format. When you create the gallery, you indicate which Digital Assets Library folders contain the images to display on the page. When the page is published, all image files in the selected folders are displayed as your photo gallery or slide show.

This page type differs from the Photo Gallery page type in that you are provided with more display options, including the ability to size the presentation area of your gallery, select background colors, and size the thumbnails and choose how many thumbnails are visible.

Flickr Content

The Flickr Content page type allows you to create a page in your ACM that accesses images from one or more Flickr accounts so that you can display them on an ACM Flickr Content page.

Once your page is created and images displayed, visitors to your site can click an image and they well be redirected to the Flickr page containing that image.

Forum

The Forum Page type provides Forum/Message/Discussion Board functionality for your ACM Website. Create any number of sub-forums and allow anonymous or authenticated users to post their messages. Assign moderators from any of your ACM users (public users included) to help you manage your online community. Forum administrators have full edit rights for all postings.

Gallery Main / Gallery Item / Gallery Search

The Gallery page types create a set of pages to be used as a virtual art gallery of select digital assets and to enter details such as the artist, medium, size and location of the art piece. The Gallery Item page is used to publish individual images of works of art and the associated information about the art. The Gallery Search page allows visitors to your site to search Gallery items based on the information you enter on the item pages.

General Content / General Content 2 / General Content 2Ex / General Content 3

The General Content page type is the most commonly used page type for adding basic content pages with text, links and images. Use General Content 2 or General Content 3 pages when you need multiple editors for your users.

GEO Search

The GEO Search page type allows your users to search for programs near them. Provide the page with a list of programs and address info in the Page Settings section. Your users will

be able to search these programs and see the search results on a Google map. Users can search for programs by city or zip code and can specify a distance within which to search.

Google Map

The Google Map page type provides directions, interactive maps, and satellite/aerial imagery of the world directly integrated into ACM. By creating site points on a map, each with customized icons, site visitors can zoom in and out of the map, change views, and enter addresses to get directions to any of the site points.

Google Site Map

The Google Site Map page type provides an easy way to submit site URLs to the Google Index and get detailed reports about the visibility of pages on Google. With Google Site Maps a site administrator can automatically keep Google informed of all site web pages, and when changes are made to these pages to help improve coverage in the Google crawl.

Help Desk / Problem Report

The Help Desk page type and the Problem Report page type are used together to create a problem reporting structure on your website. This structure allows your customers to report problems via your website and gives you a mechanism for providing feedback and problem resolutions to your customers.

Home 3

Home 3 pages are automatically created as the first page of a new site. They function exactly like the General Content page type.

HTML Consumer

The HTML Consumer page type allows you to copy and paste HTML to be displayed or point to a web page and use your own custom regular expression (regex) to determine what content should be displayed.

Instagram

The Instagram page type allows you to create a page in your ACM that accesses images from an Instagram account so that you can display them on an ACM Instagram page. Visitors to your site can click on an image and they will be redirected to the Instagram page that contains that image (or directly to the source image itself).

Job Center

The Job Center functionality takes advantage of the syndicated page framework in ACM; that is the job center main page allows for search and display of syndicated job posting pages. The page works in conjunction with the standard ACM survey form to collect job application data and resumes. If you wish, you can manage job openings on your internal website then allow certain job postings to be displayed on your public website at a future date. The added functionality makes it far easier for job seekers to browse, search and apply for your open positions.

KB Article

The easy-to-use interface of the KB Article page type allows you to quickly create and publish knowledge articles complete with features such as associated articles, knowledge experts, attached documents and related links. Knowledge articles can be easily emailed to others making the KnowledgeBase an ideal complement to your other call center products or a great stand-alone product.

KB Article Search

The KB Article Search page type allows your users to do a keyboard search of the article database for relevant issues and solutions.

Learning Module

The Learning Module page type allows you to create online learning material and assessment tools for your site. You can create multiple chapters and tests for each learning module page.

Link

The Link page type creates a navigation link to an internal or external web page and has it appear in the section menu or child page list. Options allow you to specify if the linked item opens in new window, is displayed in the current window or is displayed within a frame on the page.

Listing Service

The Listing Service page type allows the public to contribute to a listing on your web site. It is perfect for creating a business listing on your government site and allowing local business to add and update their data. It can also be used as a sales listing site with listed items expired after a period of time. Allow anonymous contributions or require the contributor to create an account, all data can be moderated and edited by the page admin.

Login

A Login page is automatically created with a new site. If you use Personalization on a site, you can create additional login pages.

Media Center

The Media Center page type provides a central location for uploading, searching, viewing, rating and commenting on video content on your website. It is supported as both a pagelet and a page type.

Microsoft Map

The Microsoft Map page type is an alternative to the Google map. It allows for such features as Map, Satellite and Hybrid views as well as providing Bird's Eye views of specific sports complexes, monuments and important landmarks.

Multi-Poll Pagelet

The Multi-Poll pagelet allows you to configure polls for you web site, much like the QuickPoll. The difference is that you now have the ability to allow multi-selection on a poll

(checkboxes and radio buttons), mixed mode responses ("other" radio option with a text box to input a value) and customize the color of the response bars. The results can also be displayed within the pagelet zone that the poll resides... without reloading the page!

Multi-Site Map

Because multiple sites can be managed in one installation of ACM, the Multi-Site Map allows a site map to be generated using multiple sites from a single installation. Users have the option to select which sites from the installation are selected to be shown in the site map using formats ranging from page titles to full location lines.

MyLinks Pagelet

The MyLinks pagelet allows you to provide your users with a personal set of links on any page in the site. Links can be tracked by persistent cookie on the user's machine or by username. As soon as a user logs in, their defined links will appear. The pagelet also works with an "Add to Mylinks" ironpoint tag that can be used in your template package. This way, users can easily add any page on your site to their MyLinks pagelet with the click of a link. External Links can also be added by the user.

People Finder

The People Finder page type creates a directory of people or organizations with their contact information.

Photo Gallery

The Photo Gallery page type creates a display of graphic digital assets. By indicating which folder(s) in the Digital Assets Library will be used, only assets in the designated folder(s) are displayed.

Podcast

The Podcast page type allows you to create any number of podcast channels on your website by simply pointing to a digital asset folder. You can enable RSS subscription as well as iTunes subscription and the podcast will syndicate any mp3 or wma file added to the digital asset folder. Each podcast can have its own associated image and any number of episodes.

Proposal Builder

The Proposal Builder page type can be used to combine multiple word documents and apply specific formatting to output a unified word document. Attaching various word documents from the Digital Asset Manager allows a user to pick and choose which documents to combine to create a custom document.

Quick Links

The Quick Links page type is the most flexible link-building feature available in ACM. It allows you to build a page of different kinds of links from different sources. This is useful for creating lists of News items or What's New links on your site.

Quick Poll

The Quick Link page type is frequently used as a pagelet which lets you place a poll anywhere on a website, even the homepage. When visitors vote on the poll they get immediate feedback on the current voting status. You can also restrict the number of times people are able to vote.

Randomizer Pagelet

The Randomizer pagelet is used to create a pagelet that displays random content from a set of pagelets as defined under a parent category pagelet. The content from other pagelets will display within the randomizer pagelet area each time a page with a randomizer pagelet assigned to it is visited or refreshed.

Ratings Pagelet

The Ratings pagelet allows viewers of your page to rate the contents on the page by clicking on the rating icons. An average overall rating score can be displayed both graphically and numerically. You can customize the wording and the icons to make the pagelet suit your own purposes. Rating results for all pages can be managed centrally under edit mode of the rating pagelet. The single pagelet can be reused across multiple pages with only the result specific to each page being displayed. Results of the ratings on different pages can also be rendered on a Rating Report Page.

Ratings Report

The Ratings Report page type allows your users to view the ratings of all pages in a central location. These ratings are organized by the pagelet through which the rating was assigned. For instance, if a rating pagelet called "Book Review" was assigned to multiple book pages, all of the ratings for each of the book pages would be group under "Book Review" on the rating report page type. The ratings for all pages using a particular rating pagelet can be linked to directly from the rating pagelet itself, however visiting the rating report page by browsing to it will allow you to view results for a number of ratings pagelets.

Regional Search

The Regional Search page searches specifically on the Region meta data field. This allows you to tag your pages as being region specific. Use this functionality to allow site visitors to search for a location near them.

RFP Landing / RFP

The RFP Landing page type creates a landing page for your RFP pages. The RFP landing page is the parent page for all your RFP pages and acts as a search mechanism for all your RFP pages.

A set of two page types provide the functionality for posting and searching requests for proposals. Users log in to the RFP page. RFP pages include summary and contact information and a bidder list.

RSS Feed

The RSS Feed page type allows you syndicate a group of child links in the form of am RSS XML file. When you create the RSS Feed, you indicate which internal link (page) or group of child links will be part of the RSS Feed. When the page is published, a subscription link is automatically added to the page.

RSS Feed Reader

The RSS Feed Reader page type provides you with the ability to display updated links from internal or external RSS feeds. A reading pane for the syndicated feed is not provided; the links open the feed at its originating location.

Search

The Search page type creates a site or section specific search on a website. The search results can be returned for one site only or for all of the sites managed by ACM.

Site Index

The Site Index page type dynamically generates an alphabetical list of content that is presented in your website. You can index by tags or by the contents of the site page titles.

Site Map

The Site Map page type creates a site map for a complete website or smaller or sections. You can define the display format of the links as well as how many page levels will be available.

Survey

The Survey page type creates simple forms such as surveys and order forms that are filled out and submitted online.

Syndicated Calendar

The Syndicated Calendar page type is used to retrieve and display calendar events both local to your ACM installation as well as events from other installations of the ACM. You can also display events from the Asset Service system. All these events, regardless of where they originate, can be displayed on a single calendar.

Syndicated Content Index

The Syndicated Content Index page type allows you to arrange clickable thumbnail photos of syndicated items on your page so that users can easily navigate to your site's most recent syndicated items. The index draws items from pages that are based on the Syndicated Calendar and Article Index page types.

Syndicated KB Article Search

The Syndicated KB Article Search page type acts as the home page for your knowledgebase. The home page displays all of your syndicated knowledgebase articles.

Tab Display Pagelet

The Tab Display pagelet lets you create a pagelet that displays the content of multiple pagelets in a tabbed format. You have the ability to configure which pagelets are displayed, the order they appear and use an optional setting to have the tabs rotate through the content at a period you determine. If tab cycling is not enabled, visitors to the page will tab through the content manually.

Twitter Feeds

The Twitter Feeds page type allows you to connect to any number of twitterers and have their tweets display on your website. You can configure how many tweets should appear. This is a great way to bring social media content onto your website.

User Portal

The User Portal page type is a view mode version of My Page that can be used for standard ACM Users and Public Users alike. The User Portal page show user-specific information based on the user that is currently logged in. You can configure the system to also display User Portal pages to other users. The User Portal page also configures the fields available on My Page.

Weather Widget pagelet

The Weather Widget pagelet displays local weather in a widget from one of five weather websites.

XML Transformer

The XML Transformer page type allows you to receive or create content in the form of XML mark-up and display it on your ACM site. You are provided with the ability to enter XML content, reference an XML file, or connect to a webpage as the XML source. The layout of the XML can be controlled through the use of XSLT (Extensible Stylesheet Language Transformations) and CSS (Cascading Style Sheets) by providing the XSLT, referencing an XSLT file, or connecting to a webpage that provides the XSLT.

Appendix H – Meta Tags

Meta tags are used to attach meaning to page content. The tags are inserted into the HTML code of a page and help identify the page content. When search engines search the page, the meta tags are read to identify the content and return it in search results if it is relevant to a search query.

Metadata Tag Types

There are pre-defined meta tag types available in ACM:

- **Description** - used for a summary description of the content.
- **Keywords** - used to hold multiple keywords describing the content.
- **Author** - holds the name of the content author.
- **ROBOT** – contains directives for indexing robots. For more information see: www.w3.org/TR/REC-html40/appendix/notes.html
- Custom - allows you to create your own custom meta tags for your site.

For more information on metadata...

For advanced information refer to the National Information Standards Organization, or the World Wide Web Consortium:

- www.niso.org/standards/resources/UnderstandingMetadata.pdf
- www.w3.org/Metadata/
- For Dublin Core Metadata Initiative (DCMI) Standards: http://dublincore.org/

Appendix I - Question Editor

The Question Editor is opened any time you add questions or other types of data collection fields to a form or survey page.

The topmost section of the Question Editor captures the question text as well as the question type, placement and formatting information.

The **Answers** section of the Question Editor is used for entering lists of possible responses from which your users will choose when answering the questions.

The **Preview** section shows what the question will look like once it is published on the form or survey.

> **Note**: The fields available in the Question Editor depend on the type of question you are creating.

Question Types

Questions and information fields described here are used on surveys, general forms and application forms. They are also used when administrators set up metadata information:

- **Attachment**: Allows a document or other file to be attached and sent with the form submission. The functionality for locating and attaching the document is built in to the question. You can restrict the types of assets that can be uploaded through this question type when you are building the question.

- **Checkbox**: Used when a respondent can make multiple selections from a small set of possible answers.

- **Country**: Used to select a country for the answer. The list is pre-formatted, you do not need to create the list.

- **Custom Group Single Select**: Used in the application form to select one group that has been made available for the application form.
- **Custom Group Multi-select**: Used in the application form to select more than one group that has been made available for the application form.
- **Date**: Used to provide a formatted date, such as a birth date.
- **Date / Time**: Used to provide a date and a time such as the date and time they were born.
- **Description**: Used to add some instructions or other text in between questions or sections. This type of text on a survey has no answers.

The next section of the survey is for people with dependants only. Please proceed to section C if you do not have dependants.

- **Drop-down List**: Used when a respondent must choose a single answer from a drop-down list of answers.

Please select your favourite colour from the list:
REQUIRED
Blue

- **Email**: Used to collect a formatted email address. The red text shown below is automatically added beside the email field.

Please provide your email address for receiving program updates.
REQUIRED
Enter a valid email address.
Example: name@company.com

- **Email Results**: Provides a field to enter an email address. A copy of the user's survey is sent to the address in this field.
- **Email Results From**: Uses the value entered in this field as the "From" value when the email notification is sent.
- **Email Subject**: Uses the value entered in this field as the subject line for the email submission notice. If no value is entered, the default subject line applies.
- **Email Results to Group**: Provides a field to select a group. A copy of the user's survey is sent to each member of the group.

  Note: To make groups appear in the drop-down box on the published survey, go to the Group Manager and make sure that the group has the Make Available to External Applications and page types checkbox checked. If you do not have access to the Group Manager, see your system administrator.

- **List** (Single Selection): Used to select a single answer from a large number of possible answers. This type of selection box does not permit more than one selection at a time.

Select your first choice of menu options from the list below.
REQUIRED
Sort of
Not really
Very well
Never tried
Menu E - Free Range Chicken

- **List (Multiple Selections)**: Used to select multiple answers from a large set of possible answers. Respondents can hold down the CTRL key and click on the multiple selections with their mouse.

- **Radio Button**: Used to choose a single answer from a small number of possible answers. The system does not permit more than one radio button to be selected.

- **Rank**: Used to indicate a preference or rank the available choices. Users rank their preferences from 1 to N where N is the number of choices. They rank them by entering numbers in the edit boxes beside the choices.

- **Telephone Number**: Used to enter a formatted telephone number. The red text shown below is automatically added beside the phone number field.
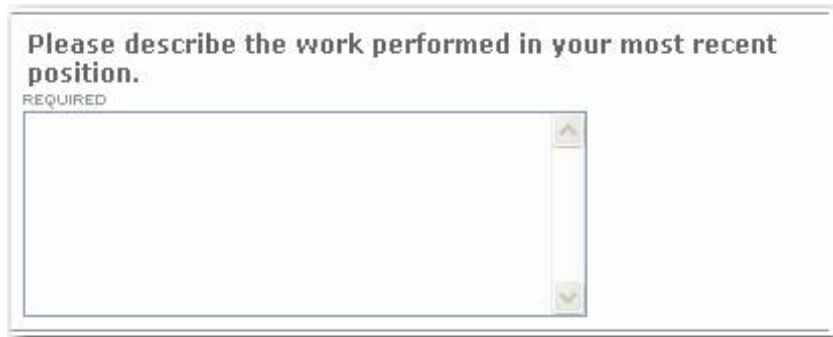
- **Text (Single line)**: Used to provide a single text line for entering an answer. It is used for collecting address information lines and other single-line text answers such as the one shown below.

> Please enter a question for us to ask you should you forget your password.
> REQUIRED

- **Text Area**: Used to provide a lengthy text answer. The maximum number of characters allowed for each Text Area box is 8,000.

> Please describe the work performed in your most recent position.
> REQUIRED

Adding Page and Section Breaks

These steps apply to application forms, general forms, and surveys.

Adding section (category) breaks to forms

To add a section break to a form:

1. Edit the page and go to the **Content** tab.
2. In the appropriate **Questions area**, click [New] and select **Category**.
3. When the new category is displayed on the form, click [edit icon] to edit it.
4. Enter the **Question Text** for the category break. This text appears as a section title would.
5. Select the **Question Placement** (Top or Left).
6. Click **Update** to preview the category text.
7. Click **Save**.
8. Click **Save** again when back on the **Content** tab.

Adding page breaks to forms

To add a page break to a form:

1. Go to the **Content** tab of the form.
2. In the appropriate **Questions area**, click [New] and select **Page Break**. The page break is inserted as the next question on the survey.
3. Move the page break up or down if it is not already in the desired location.

Adding Questions

To add a question to a form:

1. On the **Content** tab of the form/survey, make sure you are in the Site Profile or Survey Questions section.
2. Click [New ▾] and select the desired **question type**.
3. Type in the **Question Text**.
4. Select the **Question Placement** (Left or Top).

   Note: Selecting Left places the text of the question on the left and the answer options on the right. Selecting Top places the question text on one line and the answer options on the line below the question.

5. If a response is required, check **Response Required**.
6. Complete the remaining fields.
7. Click **Update** to preview the question.
8. Click **Save**.

Copying Questions

Use these procedures to copy questions within a single form or survey, or to copy a question from one form to another. When you copy a question, the answer set for the question is also copied.

Copying questions within the same survey or form

To copy a question within the same form:

1. Edit the form or survey.
2. Locate the question you want to copy and click the [icon] button beside it.
3. Position the cursor on the question below where you want to paste the question.
4. Click [icon] to paste the question into the new location.
5. Edit the copied question and answers and click **Save**.

Copying questions from one survey or form to another

To copy a question from one form to another:

1. Edit the form or survey.
2. Locate the question you want to copy and click the button   beside it.
3. Edit the survey you want to copy the question to. Be sure to edit the survey in **Full Edit** mode.
4. Position the cursor on the question below where you want to paste the question.
5. Click [icon] to paste the question into the new location.
6. Edit the copied question and answers and click **Save**.

Deleting and Deactivating Questions

Use these procedures to delete permanently or temporarily deactivate questions on surveys and forms. Be aware that deleting a question permanently removes it and all historical data for that question from the database. This also holds true if you have an answer set, such as checkboxes or radio buttons. If you delete one of the answer options, it and the historical data for the option will also be permanently deleted from the database.

Deleting Questions

To delete a question:

1. In the **Survey or Site Profile Questions** section, locate the question to delete.
2. Click to delete the question.
3. Click **OK** to confirm the deletion.
4. Click **Save** and submit for publication.

Inactivating Questions

When you deactivate a question or field, this prevents it from being displayed on the published survey, but it will still be visible on the survey in edit mode. The question can be reactivated later should you wish to use it again.

To inactivate a question:

1. In the **Survey or Site Profile Questions** section, locate the question to deactivate.
2. Uncheck the **Active** checkbox beside the question. This will prevent the question from being displayed on the published survey.
3. Click **Save** and submit for publication.

You can reactivate a question by editing the survey, locating the inactive question and checking the Active checkbox again.

Reordering Questions

Use this procedure to change the order of the questions on your surveys and forms.

To reorder a question:

1. Edit the form or survey.
2. Go to the section containing the questions you want to reorder.
3. In the **Order** column to the left of the question, click on the **Up** and **Down** arrows to move the question up or down in the order. You can also click on the **Number** and type in a new number that represents where in the order you want that question to fall.
4. Click **Save** and submit for publication.

Appendix J – Multi-Language

Enabling Multi-Language

Before the multi-language features can be accessed through the application, two system changes need to be applied.

On the IronPoint.config tab located in the Admin Center > Configuration Files, check the box in the Feature Extensions section to enable Multi-Language.

In addition to the IronPoint.config change, the multi-language license file must be available in the "bin" directory of the application. The filename for the multi-language license is IronPoint.CM.Framework.TranslationManagement.TranslationService.lic

Without this file, multi-language will not operate. If the feature extension is enabled on the IronPoint.config tab, but the license is not available, an error message will be logged inside the system, but no multi-language functionality will be available for use.

Multi-language Sites Overview

ACM allows you two connect one or more sites together in a Multi-language grouping known as a Translation Set. Once the sites are linked together, the publication of information on one site triggers events and translation requirements on the other sites. In this way you can manage your multi-language content across multiple sites, ensuring that all sites stay current and are translated when content changes.

For information on working with Multi-language at the page level, see the Content Publishing Guide.

Overview of the Process

The points below offer a brief outline of the steps involved in implementing multi-language functionality with your ACM installation:

- Install the correct licensing for multi-language support.
- Group sites together, forming what is called a translation set (for example your English, French and Spanish sites could be linked together)
- Determine which sites require translation; generally there will be a primary site - perhaps your English web site, and a secondary site - perhaps a French or Spanish site. The primary site would normally be set to require translation while the secondary site would not.
- Associate pages from your primary site with pages from your secondary site - for example: you would associate the home page on your English web site with the Home page on your secondary site. This association helps maintain the currency of all sites within the translation set.

- Edit pages and process translation pages through the additional workflow steps required for translated sites.

User Interface Changes for Translation Sites

There are a number of components of the user interface that differ when multi-language functionality is being used.

Site Manager

The Site Manager now includes a Translation Set tab. Use this tab to group sites together into translation sets. A translation set will generally consist of your primary language web site and one or more secondary language web sites.

For example, a translation set may consist of a primary English language site and a secondary French language site that mirrors the same structure as the primary site.

Page Configuration

When multi-language is implemented on a site, the Page Editor displays an additional tab - the Translation tab. The settings on this tab control how the page gets translated from another page, or to another page, depending on whether the page is on your primary language or secondary language site.

Template Configuration

The page templates in the Design Package must be updated to include special tags that facilitate the use of multi-language functionality.

Workflow Changes

Workflows now contain additional steps and workflow emails. For example: when a page is set to require translation on the secondary site before it can be published, publishing the page will display a Pending Translation message, indicating that it cannot be published until the translation has been completed and published.

There is also a Translation Required email that gets sent to the content providers for the secondary site, indicating which pages require translation.

Child Pages

When child pages are created on the primary site, and the parent pages have already been linked between the primary and secondary sites, a child page is created automatically on the secondary site and is placed into Draft mode.

Page Type Localization Support

Multi-language buttons and labels are displayed in View mode only and for the following page types only:

- Application Form
- Calendar
- Login

- Photo Gallery
- Search
- Survey

Other page types were reviewed and did not require changes as they only display content added by users.

Section Menu Site-toggle Button

In addition to page template changes in the Design Package, updates to the section menu files must also be made. These updates place a toggle button in the bottom area of the section menu. This button allows you to flip back and forth from the current page to the translated version of that page on the secondary site.

Friendly URLs

As of version 8.9, sites linked through Multi-Language can all be set to use Friendly URLs with the same domain name. That means that you can use the same domain for all of your multi-language sites. Please refer to the How to Enable Friendly URLs for all Multi-Language Site whitepaper for steps on setting this up.

Translation Workflow Steps

The process of creating and publishing your site content contains additional steps when working in a multi-language environment. The table below provides an example of the process of creating content on a primary language site and translating it on a secondary language site.

Assumptions:

- The primary site is set to require translation before its content can be published
- There is one primary language site and one secondary language site
- The sites have been configured in a translation set and the Home pages have been linked

	Action taken on Primary site	Action on Secondary site
Step 1	Add textual content on English home page and Save. Status: Draft	No action occurs on the secondary site. Status: Draft
Step 2	Edit the text of the Home page and publish. Status: Pending Translation	No action occurs on the secondary site, but it now requires translation Status: Draft

	Action taken on Primary site	Action on Secondary site
Step 3	None	Complete translation of the Home page from the Primary site and Publish. Status: Published
Step 4	Home Page is automatically published. It was pending translation and once the translation was completed and published on the secondary site, this site's page automatically got published. Status: Published	None Status: Published
Step 5	Create a General Content child page on the Home page of the primary site and add some draft textual content. Status: Draft	A general content child page with the same name is automatically created on the secondary site and is set to Draft mode. Status: Draft
Step 6	Publish general content child page on primary site. Status: Pending Translation	None Status: Draft
Step 7	None	Complete translation of general content child page and publish. Status: Published
Step 8	General content child page is automatically published the minute the page that is associated with it is translated and published. Status: Published	None Status: Published

Configuring Sites for Translation

Use this procedure to configure sites for translation and to group multi-language sites together into translation sets.

To configure a site for translation:

1. From the **Admin Center**, open the Sites Manager.
2. Edit one of the sites you want to include in the translation set.
3. Click the **Translation Set** tab.
4. Be sure you have selected the appropriate Language for site.
5. Decide if you want to set this site to require translation. Generally, you would set your primary language site to require translation and set your secondary language sites to not require translation. So if you have English, French and Spanish sites and the English site is your primary site, you would set the English site to require translation and leave this unchecked for the French and Spanish sites.
   When you set this to **Requires Translation** it means that no page on the English site can be published until the same page on all other language sites have been translated and published. However, even when translation is set to required, emergency publishing will temporarily bypass the need to translate before publishing.
   If you choose to leave this checkbox blank, you can still set the requirement for translation on individual pages or groups of pages. As the site administrator you will see a special field on the **Translation** tab in the **Page Editor** that allows you to force a page and all of its children to be translated before the page can be published.

6. If you have already created all of the sites that will be included in your translation set, you can group them together now by clicking the **Change Translation Set** button.
   - On the Add Sites to Translation Set dialog, select the sites you want to group with this one and click **OK**.
   - On the **Translation Set** tab, review the sites you have added and make sure the language settings for each site are correct.
7. If you have not already created the other sites to be grouped together in the translation set, click **Save** and create the other sites. Then group them into a translation set using the previous step.

Enabling the Multi-language Section Menu

Two components within the Design Package must contain special tags in order to support multi-language functionality.

A multi-language menu can be added to page templates. This menu displays bidirectional links between associated translation pages. For example your English page and your French page would both contain links to each other so that you can quickly view the page associated with the page you are viewing.

To add the language menu to a page template, add a tag as follows:

```
<ironpoint>languagemenu</ironpoint>
```

In order to control the formatting and style of the new language menu, copy your SectionMenuData.xml file to a new LanguageMenuData.xml file. You can then optionally edit the LanguageMenuData.xml file to alter how the menu items appear. The LanguageMenuData.xml file permits the same functionality for the language menu as that permitted for the section menu. Refer to the *ACTIVE Content Manager Design Guide* for more information on working with xml files.

Important points to keep in mind:

- If there are more than two sites in the translation set, you will get a drop-down menu when you click on the link.
- The links only appear if the linked pages have both been published.
- If you emergency-publish and break the link to the associated page, the button will not be displayed.

Removing Sites from Translation Sets

Use this procedure to unhook a site from a translation set. The site will still be intact, but the multi-language functionality will be removed. You can then use the site or delete it.

To remove a site from a translation set:

1. Open the **Sites Manager**.
2. Edit one of the other sites in the translation set. Do not edit the site you want to remove from the set. You can only remove a site from a translation set by editing another site in the set.
3. Go to the **Translation Set** tab.
4. Click **Change Translation Set**.
5. In the popup list of sites, uncheck the site to remove from the translation set.
6. Click **OK**.
7. Click **Save**.

Appendix K – Friendly URLs

Friendly URLs are specific to dynamic sites (sites that are not exported).

Turning this feature on replaces the generic page number and .aspx extension with more user-friendly URLs without having to lose the dynamic site functionality.

> **Note**: As of version 8.9 Friendly URLs can now be enabled on more than one site in a single instance of ACM as long as the sites are linked through Multi-Language.

> **Note**: As of version 10.0 Friendly URLs are now supported on non-child pages. Non-Child pages are any pages that do not reside in the site structure as a child page. Examples include syndicated pages and blog entries in the new Blog page. In previous versions of ACM, these pages were rendered in the URL with a query parameter (/BlogPage.htm?EntryId=12345) that are difficult to read and do not help with search engine optimization. In 10.0 the above example would now render as /BlogPage/EntryTitle.htm.

For example, a page: http://cms.mysite.com/page123.aspx is exported to http://www.mysite.com/welcome.htm. The friendly URL on the cms.mysite.com site would become **http://cms.mysite.com/welcome.htm**

- Friendly URL functionality is enabled/disabled on a site-by-site basis (in the Sites Manager)
- The URL for a page is generated based upon the exact same rules that are used for creating URLs for static exported sites.
- When Friendly URL's are turned on for an existing IronPoint site all manually coded links within the site will not be updated.
  - When Friendly URLs are turned "on" the section menu, QuickLinks PageTypes, Link Pagetype, Multi-SiteMap Pagetype and SiteMap Pagetype will automatically reflect the new URL scheme.
  - When Friendly URL's are turned "on" the Links and other Hard-coded URLs will not be updated and will require a manual correction process.
- All digital assets references are changed to have Friendly URLs.
  - The folder path for the asset shall match the Digital Asset folder path it is found on. For example:
    If in the DA Library a PDF asset with the name of Kent's Resume is located in the Assets\Resumes folder when used on a Site with an FQDN of http://www.mydomain.com the Friendly Asset URL would be http://www.mydomain.com/Assets/Resumes/Kent$!27s+Resume.pdf
  - The file name for the asset is based on the Internet standard for URL representation of undecipherable characters (for example, apostrophes become $!27.

- Security for all assets will remain in place and assets will not be exposed directly in any public folders.

Enabling Friendly URLs

IIS Configuration

Each website that is to take advantage of Friendly URL functionality requires IIS configuration. Specific extensions that are normally handled by IIS must be mapped to the ASP.NET ISAPI handler. These extensions are ".htm", ".html", and ".*".

Follow the steps below to configure these extensions:

1. In the IIS Manger, click on the website and Double Click Handler Mappings.
2. Find the ".htm" extension in the list of Request Paths. (If the extension does not exist in the list, skip to step 8.)
3. Replace the executable in this dialogue with that of the ASP.NET ISAPI handler. This file will be in a path similar to "C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_isapi.dll". If you are unsure of where to find this file you can look for it in one of the application extensions normally handled by ASP.NET (i.e., look for the .aspx extension in the list of Application extensions and copy the filename from there).
4. There will be a "Check that file exists" or "Verify that file exists" checkbox on this dialog. Make certain that this is NOT checked.
5. Repeat the above process for the ".html" extension. (If this extension does not exist in the list skip this step.)
6. Add the wildcard ".*" extension, which does not appear by default in the list. Under Actions select Add Wildcard Script Map…
7. Set the executable in this dialogue with that of the ASP.NET ISAPI handler. This file will be in a path similar to "C:\Windows\Microsoft.NET\Framework64\v4.0.30319\aspnet_isapi.dll".
8. Name it "ACM Wildcard Map-4.0."
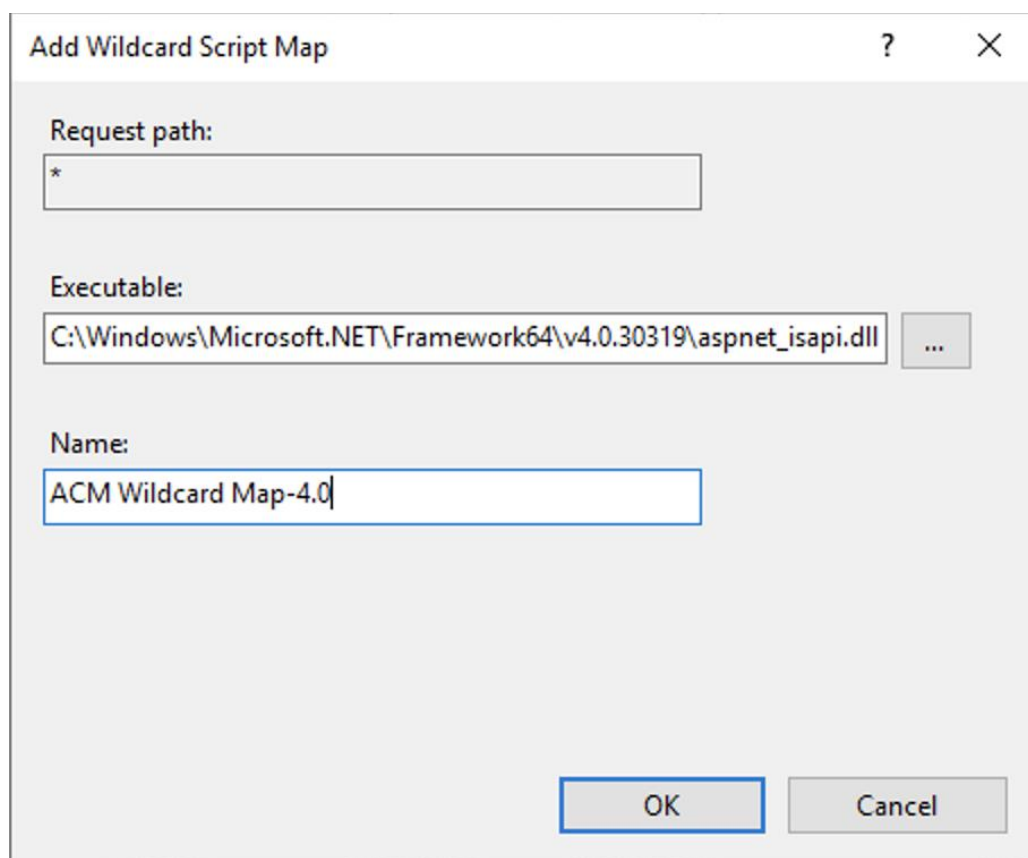
9. Depending which operating system you are using, the process is similar or the same as changing the ".htm" and ".html" extensions.
10. Apply all changes and close all dialogues.

Assets Folder

The top-level "Assets" folder is part of the Friendly URL implementation and must not be altered or removed. It contains a single "read me" file. The "Assets" folder should remain empty other than this file.

Friendly URL Folders

Friendly URLs must not conflict with real physical folders. For example, a Friendly URL such as "/RadControls/MyPage.htm" is not a valid Friendly URL. It will not properly resolve and will likely throw an exception.

Due to this conflict, the Title (or URL Title) of any child of the Home page can not be the same as a physical folder in the top-level folder. Another example would be naming a child of the Home page "Sites".

Appendix L - SFTP and FTPS

This information is intended to give an overview of the SFTP and the FTPS and some details on its usage. From version 8.2 ACM supports FTPS (FTP over SSL) and SFTP.

FTP traffic, including downloads and passwords, is usually passed as unencrypted plain text across the Internet. This makes it theoretically susceptible to capture by sniffers. One option to protect traffic is using SFTP or FTPS.

All UI changes have been made in Sites Manager, Publication tab.

Protocol and Port

The "FTP URL" field is kept in UI. It is recommended to use ftp:// prefix for all protocols.

Three types of file transfer are available:

- FTP
- FTPS – FTP over SSL
- SFTP – File Transfer over Secure Shell or SSH

Also new field "Port" is available to set the port on the server to which to connect to. FTP and FTPS are commonly run on Port 21. However SFTP uses Port 22.

FTPS

FTPS (FTP over SSL) protocol can be used once secure file transfers are required. The basic elements of configuring an FTPS connection are:

- **Protocol**: The protocol may be chosen using FTP protocol drop-down.
- **Server Validation**: It is the process of making sure that the server with which ACM is communicating is indeed the intended server. The Server validation is an important issue in FTPS. By default an attempt will be made to validation the server using the root certificates registered with the operating system. Other validation methods may be selected by FTP Server Validation Type drop-down. If the default validation method is used, then it may be necessary to set the FTP Server Common Name field. It should match the name on the certificate that the server will present to the FTP client. If it does not, then validation will fail. By default the Server Common Name is assumed to be the same as the Server Address, which is often acceptable. Server validation should always be used in a production environment, but disabling it is a good way of getting started.
- **Client Authentication**: It is the process by which ACM authenticates itself to the server. For many FTP/FTPS/SFTP servers password authentication is sufficient; it is configured through the FTP Username and FTP Password fields.

SFTP

SFTP protocol can be used once secure file transfers are required. The basic elements of configuring an SFTP connection are:

- **Protocol**: The protocol may be chosen using FTP protocol drop-down.
- **Server Validation**: Ensuring the SSH server is validated is an important issue in SFTP. By default an attempt will be made to validate the server using the client's local store of server public keys. Typically, the server's public key is stored in a file often called known_hosts which can contain a number of public keys for different servers. When ACM connects to the server, the server's public key is returned and compared with the available public keys stored in the client.
- **Client Authentication**: Clients are authenticated by either username and password, or private key and private key passphrase. In the first case, ACM requires an account on the server that is set up for SFTP access. In the second case, the ACM public key must be registered with the server (typically by copying it into an authorized_keys file on the server), and the ACM private key must be loaded by setting FTP Private Key File.

FTP Compatibility Flag

Common server incompatibility problems are caused by differing level of adherence to the relevant standards. This is particularly applicable to FTPS. For example, the standard dictates how SSL/TLS sockets should be closed. By default ACM will attempt to close sockets in the standard-compliant way. While this is the most secure, it occasionally will cause hanging as it waits for a response from the client which never arrives. The FTP Server Compatibility Flag is provided for controlling this behavior. If you experience hanging when a data-transfer is complete using FTPS then you should first try SSLDisableDataWaitOnClose and, if the problem still occurs, SSLDisableDataClosure. If you experience hanging as you close your FTPS session then you should first try SSLDisableControlWaitOnClose and, if the problem still occurs, SSLDisableControlClosure.

For SFTP, some servers return an error saying the file does not exist after creating it. By default, the client does a permission change after creating the file, which is done to ensure the file permissions are correct. If this error is encountered, try using SSHDisableChmodAfterPut to eliminate the problem.

Problem Diagnostic

There are a wide variety of FTP, FTPS and SFTP servers in existence, which may or may not implement the relevant standards. If difficulties are experienced in connecting to a server or performing operations, a number of steps can be taken to try to resolve the problem.

Make sure you can connect using a standalone FTP application. Make sure you select the correct protocol. If possible, obtain the server log file to see if it contains any clues to the problem. Generate a log file revealing the error with the level set to ALL. All commands

sent to the FTP server and subsequent replies are logged in the file. An application configuration setting should be used to set it:

```
<configuration>
 <appSettings>
      <add key="edtftp.log.level" value="All"/>
      <add key="edtftp.log.file"
     value="C:\Logs\FTPLogFile.txt"/>
 </appSettings>
</configuration>
```

Appendix M – Edit Lock

Locking and Unlocking

If Edit Lock is enabled, users will not be able to edit any content or settings of a page while another user is doing so. A user locks a page for edit by going to either full edit or quick edit mode of the page.

The page is unlocked when any of the following events occur:

- The user navigates away from edit mode.
- The user closes their browser.
- The user's session times out.
- The application is restarted.

Bypass Locking

If a user tries to access edit mode of a page locked by another user, they will be redirected to a page that informs them the page is locked. There is one scenario where a user can bypass this and enter edit mode of a page while another user has the page locked. This can potentially cause a concurrency error if the page is saved.

If a user navigates away from edit mode, the page will be unlocked. If they then return to edit mode using the browser back (or forward) button after another user has locked the page they will have bypassed the locking mechanism. This is a scenario that is rare and can be avoided entirely if users are instructed not to use the browser navigation buttons. *As a rule the use of the browser navigation buttons is discouraged in ACM, as it can cause form submission and concurrency errors.*

Bypass Unlocking

There are scenarios where a user can leave edit mode and have the page remain locked.

These are:

- If the user adds/edits a question in either a Survey or Application Form page type and does not return to edit mode (navigates away from the edit question page without clicking save or cancel) the page will remain locked.
- If the user adds/edits a link in QuickLinks page type and does not return to edit mode (navigates away from the edit link page without clicking save or cancel)

In any of these cases the page will still unlock when the user's session expires or if they return to the page and unlock it. Regardless, users should be instructed to avoid these scenarios.

StateServer and SQLServer Session

This section is only relevant for those installations that use StateServer or SQLServer to persist session. The vast majority of ACM installs use InProc for session and for these this section can be ignored. This section is especially important for multi-server installations as they must use either StateServer or SQLServer.

Due to the way ASP.Net handles session when using StateServer or SQLServer, there is no way to unlock pages a user may have locked when their session times out. Having locked pages when a session expires should be a relatively rare occurrence and should only happen with the scenarios listed in the "Bypass Unlock" section of this document.

To deal with any pages that somehow remain locked in this scenario an expiry on the lock is implemented. The settings that control this lock expiry are in the IronPoint.config file and are shown below:

```
<!-- The number of minutes before a lock expires. -->
<add key="EditLockDuration" value="360" />
<!-- The number of seconds before a lock expires that the lock
expiry warning modal dialog -->
<!-- will be displayed -->
<add key="EditLockWarningCounter" value="60" />
```

The EditLockDuration setting is the number of minutes between locking the page and when the lock will expire. If the locking user is still in edit mode of the page when the lock expires they will be shown a modal dialog that gives them the opportunity to extend the lock. The extension will be will be the number of minutes specified in the EditLockDuration setting.

Appendix N – Public Users

Public Users are user accounts that can be can be created with as little information as an email address, a password and a preferred name. A public user account is separate from a typical ACM user account in that a Public User can only belong to a public group that can have no assigned permissions.

Public User functionality will allow you to collect information from the public in order to track access through pages like the RFP page type or allow for the collection of email groups for email broadcast without the risk of inadvertently giving access to critical parts of your system. A Public User login will only persist for as long as their current session.

Public User functionality is supported by four main enhancements in the ACM system. The enhancements can be found in the Application Form page type, the Login page type, the User Manager and the Group Manager.

Application Form

When setting up an Application Form page type to allow for the application of ACM user accounts, you can specify to create the accounts as public accounts. This will change the default view of the Application Form to ask for only email address, password and preferred full name by default. You can choose to require other information such as first name and last name if you choose.

Users created through this form will be automatically flagged as public users and cannot be assigned to a non-public group.

Login Form

Since public users only need to enter an email address when applying for an account, they must use that email address to log in. You have the ability to create a public login form by selecting a "Public Login" checkbox on the login form. Not only will this change the view mode text to say, "Email Address" and "Password" but it will also force the login page to validate against the internal validation engine even if you are using LDAP integration for your normal users.

User Manager

Public Users are marked with a "P" in the user manager. The accounts are managed the same way as a typical non-public user account. You can easily turn a Public User into a normal user by deselecting the public user flag on the account. Doing this however, will require that you enter a first name and last name for the user if that has not already been collected.

Changing a normal user to a public user is allowed only if the user is not assigned to any groups with permissions. The system will warn you if this is the case. You have to remove the user from all non-public groups in order to make them a public user.

Group Manager

Public Groups are also marked with a "P" in the group manager. A group marked as public cannot be given any permissions or roles within the system. Public groups can be used for personalized sections of a site and can be made available to external applications and page types.

Appendix O – Support Contact Information

Support contact information has been added to ACM. When a user rolls their mouse over the Help button on the Admin Toolbar, they have an option to select "About ACM". Selecting this option will expand the admin toolbar to display some pertinent system information and the support contact information.

By default the support information displayed is that of ACTIVE Network, LLC's support desk. However, this information is configurable on both the System level (Global System Variables, Support tab) and the Site level (Site Settings, Support tab) so if you wish for your users to contact your system administrator for internal support, you can enter custom support contact information in either location. The site settings will supersede the system settings.

Appendix P – View Active Sessions

A report has been added to ACM that allows and administrator to view the currently active sessions throughout the ACM instance. The report can be found in the System information and can be used to see all the currently active sessions throughout the system. You must enable the enableActiveSessionTracking option in the Web.config file for this option to be available in the System Information page.

Users working in the same page in the system and in the same mode (Edit or View) will be flagged with an alert to indicate there is a risk of concurrency errors.

Each user listed in the active sessions report can be emailed directly from the report and the page on which they are working can also be linked to.

	USER	DURATION▲	LOCATION	MODE	ALERT
1	ActiveCM	00:08	Admin Center > System Information	Edit	
2	davidz	00:09	Admin Center > Global System Variables	Edit	⚠
3	ActiveCM	00:26	> Admin Center	Edit	
4	admin20	01:14	Admin Center > Global System Variables	Edit	⚠

VIEW ACTIVE SESSIONS — Total Session Count: 4

Note: in order to activate this functionality, the following value must be added in the Web.config file:

```
<add key="EnableActiveSessionsTracking" value="True" />
```

Appendix Q – Form Tags

Disabled Form Tags

As of version 8.6, the CMS will now generate content tags only around content that requires a form post to the database rather than wrapping a form tag completely around each page and its content. This will allow for two things:

- Form tags can now be inserted into the editor of a page if the page itself does not require a form tag. If you are unsure if a page requires a form tag, that's OK; all pages that require a form tag will validate to make sure there is no tag in the content and will alert the user of there is.
- Form tags can now be introduced into a template applied to any page in the system.

If you prefer to have your system operate the way it always has, you can simply disable this feature in the Ironpoint.config file setting the following key value to false.

```
<add key=" UseIndividualFormTags" value="True" />
```

Appendix R – Google Analytics

Google Analytics in a Mixed SSL Site

The standard implementation of Google Analytics uses an unsecured (http), fully qualified pointer to the tracking scripts. This results in a client-side prompt to accept a page with secured and unsecured resources. Not only is this an irritation to users, it presents a credibility problem for your site.

By implementing the https version of Google analytics in all pages, the site can support SSL where needed, without client-side prompting to accept partially secure resources.

Here are the basic steps:

1. In Google Analytics, set your Google profile URL setting to a fully qualified secured URL. Example: https://www.domain.com
2. Click the "Check Status" link in your Google profile screen to generate the appropriate script.
   Example:

```
<script src=https://ssl.google-analytics.com/urchin.js
type="text/javascript">
</script>
<script type="text/javascript">
_uacct = "UA-2223674-1";
urchinTracker();
</script>
```

3. Place the generated code in you ACM templates and upload your templates.

Appendix S – Internal Search and Replace

The ACM Internal Search and Replace utility is an Administrator only tool that can be used to search text throughout your sites and assets and replace it with new text. The feature is an Administrator only tool due to the fact that it will bypass all workflow when a term is replaced.

The Internal Search and Replace utility can be found in the Admin Center > System Information > Tools section of ACM.
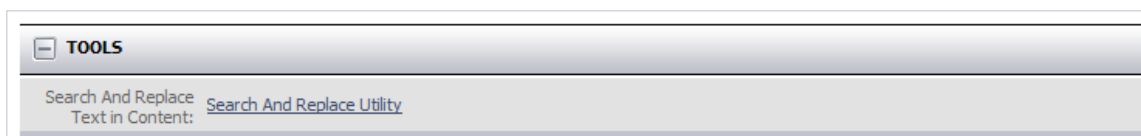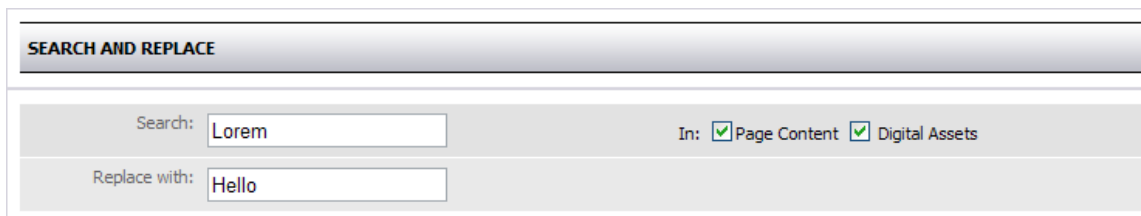
Clicking the link will launch the utility.

Search and Replace Utility

The Search and Replace utility has a number of settings that will help you narrow down the results of the searched text string that you wish to replace with another text string. Each of the settings is described below.

Search and Replace

This section allows you to enter your search term, your replace term, and the areas you wish to search:

- **Search** – enter the term for which you would like to search.
- **Replace with** – enter the term you would like to use to replace the term you search for.
- **Page Content** – selecting this option will tell the search mechanism to look within all of fields in ACM web pages.
- **Digital Assets** – selecting this option will tell the search mechanism to look within the fields used to define a digital asset. These fields include the asset name, description and alt tag.

> **Note**: The search and replace utility will not change the content of a digital asset file. That content must be changed by updating the asset directly.

Search Result Settings

This section allows you to define the search result settings:

- **Context** – enter a number in this field to define the number of words that should be displayed on either side of the searched term. This will provide you with the context in which the search term is used when the results are displayed so you can more easily determine if you wish to replace this particular term.
- **Match Case** – if selected, the checkbox tells the search mechanism to match upper- and lower-case letters in the search term.
- **Match Whole Word** – the search function, by default, will look for any occurrence of the string entered in the search field. For instance, searching for the word "cat" will return the results *cat*, *cat*ch, con*cat*enate, etc. In order to force the search to match the whole word, select this checkbox. That way if you search for the word "cat" only *cat* will be returned.
- **Limit Number of Results to** – you can limit the number of returned results in order to keep the result set manageable. You may wish to search in batches.
- **Number of results per grid page** – results are paginated in a grid and changing this value will determine the number of results to be displayed on each page of the grid.

Site and Section
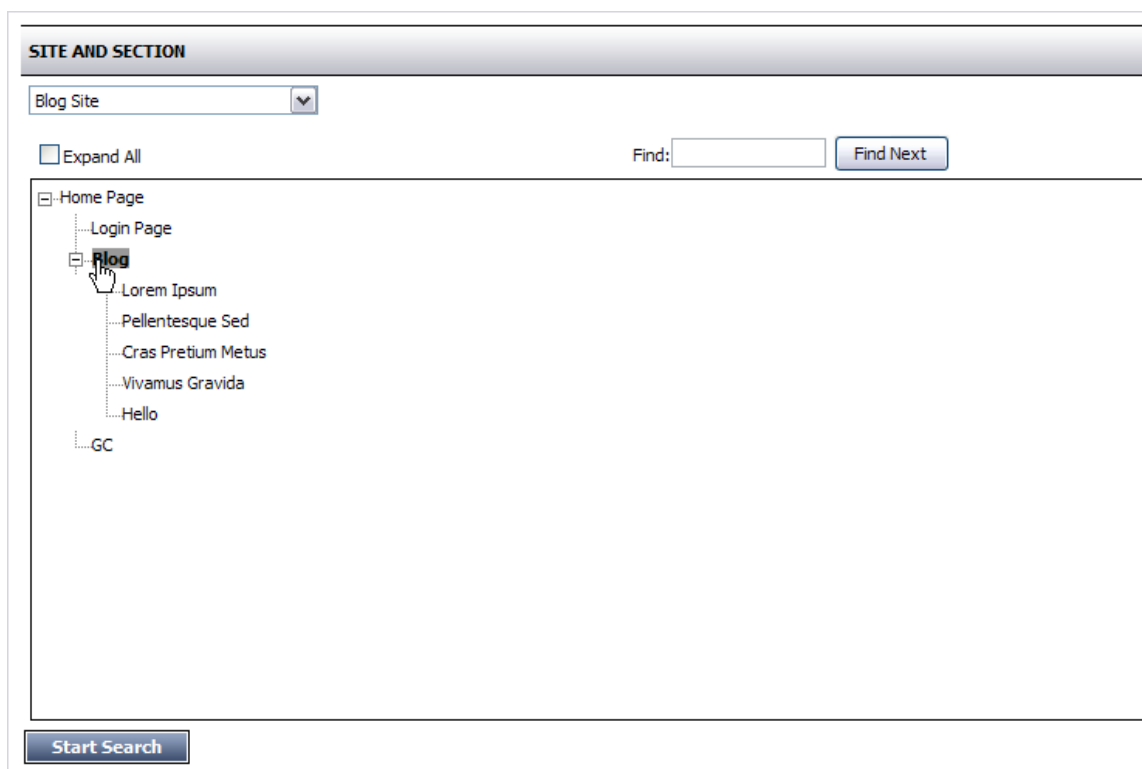
This section allows you to define both the site and the section of the site that you wish to search:

- **Site Selector** – the site selector allows you to choose the site you wish to search. By default, it will display the site that you were on when you opened the search and replace utility.
- **Section Selector** – once you have selected your site, the window will display all the pages in your site. You can expand and collapse different sections of your site and select a certain section or page for which the search should run. By default, the search will run for the entire site. The image above shows the selection of the Blog parent page. In this case, the search will examine the **Blog** page and all of its children for the search term.
- **Start Search** – this button will activate the search in the site and section you have specified.

Search Results

This section displays the searched term in the context in which it is used, the location of the page on which the term resides, the field on the page in which the term was found and the status of the page on which the term was found:

- **Context** – the content column of the grid displays the term you searched for with the defined context appearing around the term. The term is highlighted and bolded.
- **Location** – the location column displays the location of the page or asset as a hyperlink to edit mode of the page. In this manner, you use this search function to update individual pages if you choose. The column also displays the field in which the term was found. Field examples include Title, Property, Alt Tag, Description and others.
- **Page Status** – the page status column displays the current status of the page. Note that a page in draft mode that has never been published will not be displayed in the search results; all other statuses will be returned.
- **Select** – the select column can be used to select which of the searched result should be replaced by your replacement term. You can select all result by selecting the checkmark beside the work "Select" in the column heading. Note that only the highlighted term will be replaced and not the entire displayed context.

- **Replace** – click the replace button when you want to start the replace action. You will be presented with a confirmation box. Click OK to continue or cancel to stop the replace action.

Search and Replace Report

The search and replace report shows the results of your search and replace action. It displays the new term in the context of its location, a link to the page itself and the status of the search and replace action.

Appendix T – Social Media Integration

The Social Media Integration Framework is a license-able add-on to ACM that allows for content producers to promote content to various social networking platforms after they publish the content on their website. The framework consists of a social networking tab in the user profile screen and a component on the admin toolbar where a content provider can opt to promote content to each social network.

> **Note**: As of version 10.0, Twitter and Facebook are the only supported social networks. Additional networks will be added in subsequent releases.

Group Permissions

Once you have licensed the Social Media Framework, you will be able to provide the tool to your users through group settings:

1. Open the **Group Manager** and search for a group.
2. Select the group to edit the settings and select the **Tools** tab.
3. Check the box beside **Social Networking** to enable the social media functionality for that group.
4. Click **Save**.

Social Media Accounts

In order to share content with a Social Media site, an account must be configured for each site. In turn, users who post to these sites must have the social media account associated with their ACM user account. Each user can associate one account for each social media site.

The more links from various locations on the web to your website, the greater your site will rank in search engine results. You can create different corporate social media accounts and put different people in charge of posting to each of them.

There are two recommended ways of doing this:

- Allow each user to create his or her own social media account and link it to his or her ACM account. This will essentially allow your users to post links and comments to a number of personal social media accounts.
- Create organizational social media accounts and allow any number of users to associate them with their user accounts. Remember, only one account is allowed per user.

My Page

Social Media Accounts are associated with ACM User account on My Page. When a user has the correct permissions, a Social Networking tab will appear.

To allow sharing:

1. Open **My Page**.
2. Select the **Social Networking** tab. The available networks will be listed. For ACM 10.0, only Twitter and Facebook are available.
3. Follow the instructions to authorize an account for each social network.
4. Check the box to **Allow sharing to…** each of the social networks.
5. Click **Save**.

Sharing Content

Once the feature has been licensed, activated and a social networking account has been associated with a user, the user can begin sharing content to the social media sites. This is done from the admin toolbar on whatever page should be shared. Note that only view mode pages that have been published can be shared.

To share content:

1. Click the **Share** button on the admin toolbar to expand the share section.
2. Select the social network you wish to share to.
3. Note the URL of the page you are currently on is pre-loaded into the message box. Add additional text to your message and click the share button to post your message to the social media site.
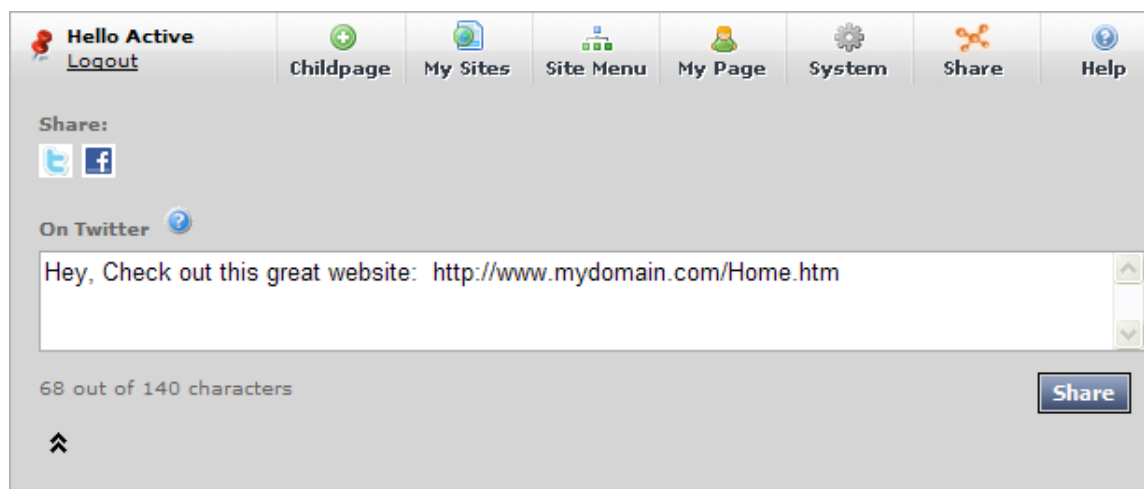
4. Click the up arrows to close the share window.

Appendix U – 404 Redirects using Multiple URLs

This section describes setting up a site that will give a different error 404 page depending on the URL that was used. For example, if you have multiple sites set up in one instance of ACM, then you can have somebody that's trying to access a page on site 1 (which does not exist) to bring up an error404 page specific to site 1 which is different from the error pages on other sites.

>   **Note**: This method does not return a 404 status code.

This does not work for URL's with no extension (i.e., www.acm.com/pagenotthere)

IIS will process this URL because it assumes it's a virtual directory, it doesn't get to ACM yet, so if there is an error, it is handled by the CustomErrors setup in IIS which you will need to configure separately in the web site properties of IIS.

Create a 404.aspx file in the system folder, or somewhere else accessible by the site. There is an example of a 404.aspx file below.

Update the Web.config file

This handles requests to .NET (not ACM) that receive a 404 response:

```
<customErrors mode="Off"
defaultRedirect="~/System/AdminAppError.htm">
<error statusCode="404" redirect="/System/404.aspx" />
</customErrors>
```

This handles 404 errors that ACM throws. It cannot catch errors caught by .NET, or IIS. And this setting is available only in ACM 8.2 and above

```
 <add key="System404Page" value="/System/404.aspx" />
```

The example below assumes you're using friendly URL's with .htm as the extension, and that you've created a page called 404 at the root of each site. Please adjust the example below to your setup. (if you don't have friendly URL's set up, you can point it to ~/pageXXX.aspx)

```
================= 404.aspx Example =================
<%
dim strURL as string = UCase(Request.URL.tostring)
If InStr(strURL, UCase("www.site1.com")) > 0 then
     Response.Redirect("http://www.site1.com/404.htm")
elseif InStr(strURL, UCase("www.site2.com")) > 0 then
     Response.Redirect("http://www.site2.com/404.htm")
If InStr(strURL, UCase("www.site3.com")) > 0 then
     Response.Redirect("http://www.site3.com/404.htm")
```

```
else
      Response.Redirect("~/System/Error404.htm")
end if
%>
================== End of File ==================
```

Note: Remember to keep your 404.aspx file during an upgrade. Or alternatively, you could put the 404.aspx file in the /Sites folder because that folder is always left intact during an upgrade

Appendix V – Enabling Single Sign-On

The Single Sign-On feature for self-hosted sites is a solution that enables a user who is part of a client Microsoft® Windows® domain from having to repeatedly authenticate himself or herself to access Ironpoint CMS.

Set-up Steps

The following steps are required in order to enable the Single Sign-On (SSO) feature. Note that it's desirable to have all working users in the CMS user roster.

To enable single sign-on:

1. Disable Anonymous access to the site:
   a. In IIS Manager, expand the local computer node, expand the Web or FTP Sites folder.
   b. Right-click the Web site that contains the ACM application virtual directory and then select **Properties**.
   c. Go to the **Directory Security** tab.
   d. Click the **Edit** button in the **Anonymous access and authentication control** section.
   e. Uncheck the **Anonymous access** checkbox.
   f. Make sure that **Integrated Windows authentication** is checked.
   g. Click the **OK** button. Click **OK** again to commit the changes in the IIS manager
2. In order to configure ACM to use the SSO feature, you must check the **Enable Single Sign On** checkbox on the Ironpoint.config tab in the **Configuration Files Manager**.
3. Configure a user account for the system to use when exporting the site to HTML:
   a. Create a new user in the domain and give it "Read" rights on the root ACM folder.
   b. Add the following info about the user to the Ironpoint.config file:

Enable Single Sign On	☐
User Name For Export	
Domain Name For Export	
User Password For Export	
User Authentication Type For Export	

Where:

- "DOMAIN" = Windows Domain name to which the user belongs "UserName" = Windows username of user
- "Password" = user password

- "NTLM" = the authentication scheme

Appendix W – Robots.txt

Many search engines now ignore the "no robots" meta value (Google for one). In order to prevent search engine crawlers from indexing certain pages such as your login pages, ACM now supports the use of a Robots.txt file. This file is managed through the Site Design Manager and can be downloaded/uploaded with your site design package.

Existing installations of ACM will not inherit this file upon upgrade. In order to use the Robots.txt file, download your site design package and add the Robots.txt to the root templates folder. Then zip and re-upload your template package.

Each site will refer to its own robots.txt file. Once uploaded, you can edit the Robots.txt file using the template editor available as of version 10.0.