



Sava CMS – v5

User's Guide

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1. Introduction

1.1 What is Sava?

Sava is a web content management system that can help you publish and manage web content, users, e-mail, mailing lists and advertising for one or more websites.

1.2 System Requirements

All Sava functionality is accessible through a modern web browser on either Mac OS or Windows. Sava works best with Firefox or Internet Explorer (version 6 or higher).



2. What Sava Does and How it Can Help You – An Overview of Sava’s Functionality

Sava simplifies the way you manage content, users and permissions on your websites. **Sava** can be accessed from anywhere you have a computer connected to the Internet.

2.1 Important Features and Functions

- Extensive and clear reporting of users, user activity, website statistics and reporting
- Powerful content management capability
- Detailed reports of system activities

2.2 Route Map – How to Get the Most of This User’s Guide

Here is the quick link guide to get up and running with Sava.

1. [Getting to know Sava](#) – This section deals with logging onto **Sava**, navigating around the interface, selecting menus, getting to know the various features of the home page and finally exiting from the application.
2. [The Dashboard](#) –The Dashboard gives you a quick look at all recent activity within your site, including recent visits, updated content, form submissions, etc.
3. [Site Manager](#) – The Site Manager contains the core of Sava’s functionality – enabling you to add, update and delete site content.
4. [Working with content](#) – This section looks at the Site Manager in more detail and enables you to utilize different components for creating content.
5. [Drafts](#) – **Sava** lets you store drafts of pages that are unpublished or in progress. You can review, update and publish these drafts, or send them for further review.
6. [Component Manager](#) – Sava components are content “includes” that can be created and used across your website.
7. [Category Manager](#) – Sava has powerful category-based functionality, enabling you to create extensive category/subcategory structures, and set up navigation based on these structures..
8. [Managing Local Content Indexes](#) – This section deals with one of **Sava**’s more powerful features. Here you can create elaborate and easy-to-use indexes of content and incorporate them throughout your website. You can learn to do this without any programming knowledge.
9. [Remote Control Feeds](#) – Another wing of the local content indexes; learn how to use local content indexes as remote control feeds (RSS) in this section.



10. [Data Collection](#) – In this section, learn how to collect data from users using forms.
11. [Managing Site members and Memberships](#) – Learn how to create users and groups who will be using your site.
12. [Advertising Management](#) – Learn all about running campaigns, cost per click and other advertising related functions included in Sava.
13. [E-mail Broadcasting](#)– Learn everything you need to know about e-mail management and correspondence with your customer base.
14. [Managing mailing lists](#) – Create and manage mailing lists in this section.
15. [Permissions](#) – Learn to set permissions for the **Content Manager** in this section.
16. [Administration](#) – All site administrators should read here to learn the **Administrative User** menu.
17. [Appendix](#) – A resource of useful and handy information about the system and its activities plus samples of reports.

Getting to Know Sava

Sava has a very simple login procedure and an easy-to-use interface that takes only a short while to master.

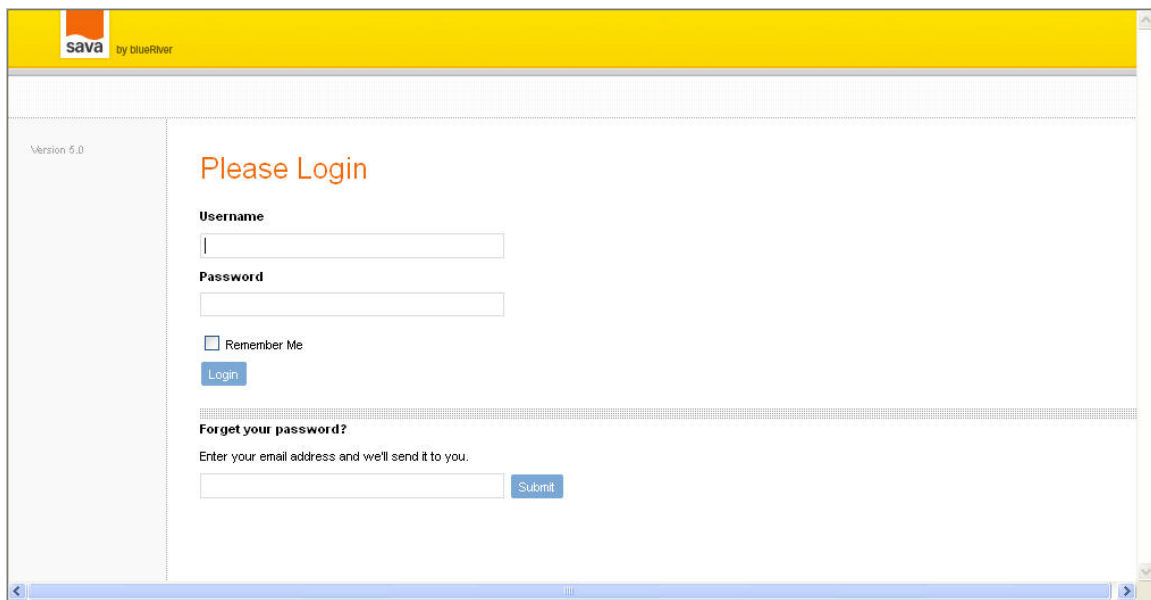
2.3 Logging In

Different users can use **Sava**. Every user logging into the application is provided a unique **User Name** and **Password**. To login to **Sava**, you must enter the correct combination of **User Name** and **Password**.

Follow the procedure below for Sava login.

1. Double click the **Internet Explorer** icon on your desktop to open the browser.
2. Enter the web address or URL provided by your Administrator.

The web page of the application with the **Login** panel opens.

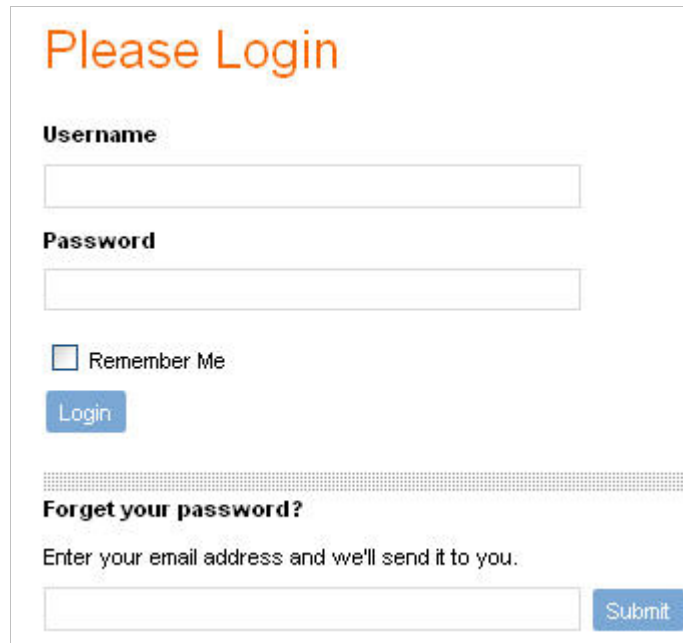


The screenshot shows a web browser window displaying the Sava login page. The page has a yellow header with the Sava logo and the text "sava by blueRiver". The main content area is white and contains the following elements:

- A sidebar on the left with the text "Version 5.0".
- A heading "Please Login" in orange.
- A "Username" label above a text input field.
- A "Password" label above a text input field.
- A checkbox labeled "Remember Me".
- A blue "Login" button.
- A section titled "Forget your password?" with the text "Enter your email address and we'll send it to you." above a text input field.
- A blue "Submit" button.

Sava – Web page with login panel

The login panel is displayed below.



Please Login

Username

Password

Remember Me

Forget your password?
 Enter your email address and we'll send it to you.

Sava Login panel

- Complete the two fields in the login window as described in the table below.

Field	Description
Username	Enter your login username. (Login usernames are not case sensitive.)
Password	Enter the password. (Passwords are case sensitive.)
Remember Me	This checkbox is optional. Check it to allow the system to remember your inputs so that you may login without having to re-type them for successive logins.

- Click Login, or Enter on the keyboard.

Note: If you have forgotten your password, enter your e-mail in the Enter your e-mail address field and click Submit. Your password will be sent to you in an e-mail.

After a successful login, you'll see the **Dashboard** page. Users will automatically be logged out after a period of inactivity – the time period is configurable in the Site Settings menu (only available to Administrative users).



Site Selector

Left Pane Menu items

Menu

Logout Button

Name of user logged in and time left before being logged out.

Details Pane

Sava home page

Note: The login screen shown above is one for an administrator. The screens are different for the type of user and client. See [Creating Users](#) for more information.

2.4 Navigating Your Way Around the Application

Sava provides a simple and easy navigation structure in the form of a menu bar on the top right of the page, a standard panel on the left and a pull-down menu of your Sava websites above that. These features stay put even if other pages and dialogs related to other menu items and websites are open. This enables you to easily access the menu bar from anywhere in the application.

2.4.1 The Menu Bar and the Menus



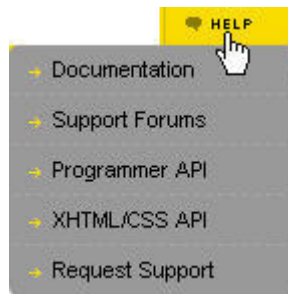
Menu bar

The standard menu bar of the **Sava** application is shown in the image displayed above. The **Logout** button is placed below the menu bar. See image above.

Described in the table below are the **Logout** button and standard menu items of the menu bar.

Menu bar item	Description
Logout	Exits the application.
Administrative Users	To create administrative users and groups use this menu.
Edit Profile	Click this menu item to edit your user profile.
Help	Access help documentation, forums, request support and access API's.

To invoke a menu, place the mouse cursor on the menu item. The menu for that menu item will appear.



Drop-down menu for Help

Assuming **Documentation** is to be selected, the instruction command for the above menu would be to click **Documentation** from the **Help** menu.

The instruction command for the above menu would be: On the menu bar click **Help** ⇒ **Documentation**.

Clicking an option from a menu will open the appropriate page to perform the designated activity.

2.4.2 The Home Page Panels

In addition to the right-hand menu bar, the home page features standard panels that offer a variety of services. The number of panels also depends on the menu item selected. The different panels and how to use them are described below.

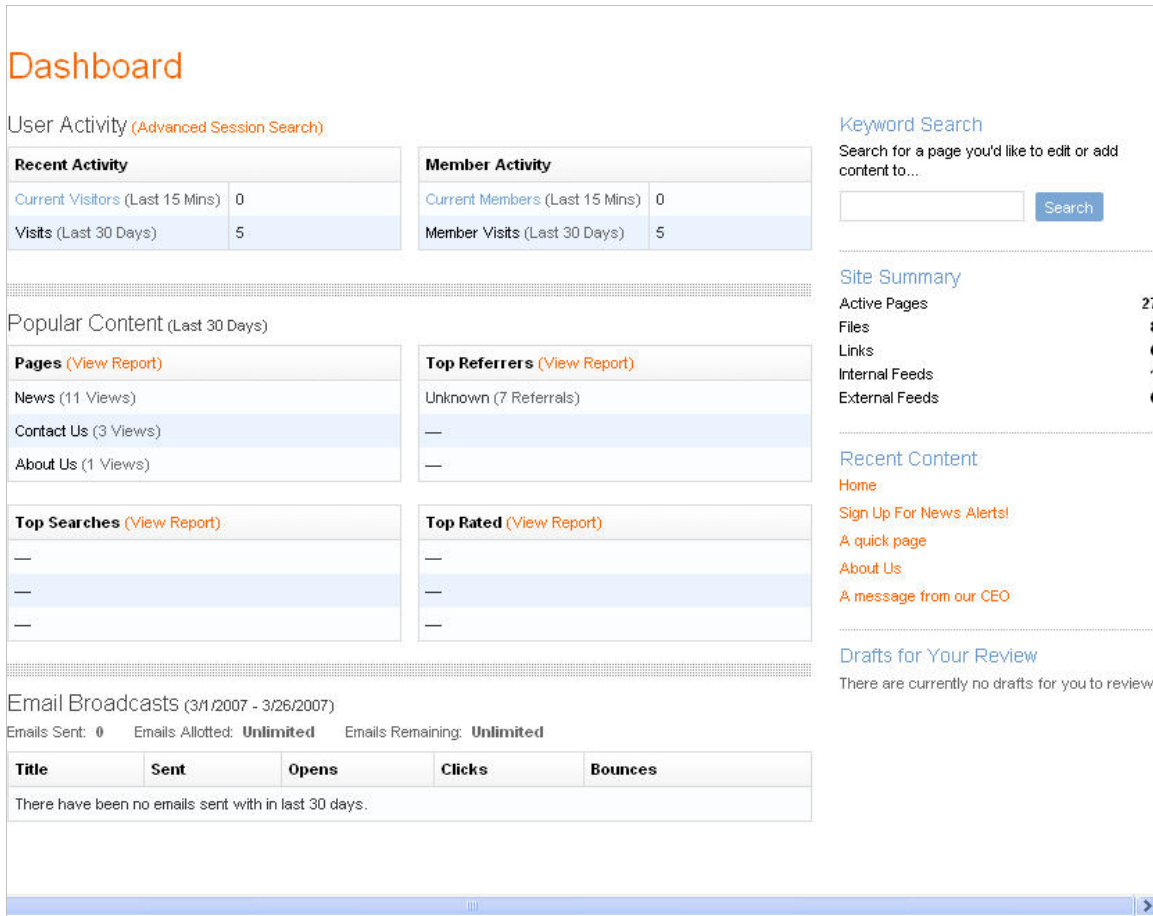
2.4.3 The Left Panel with the Main Menu Items

Dashboard →
Session Search
Top Content
Top Referers
Top Searches
Top Rated
Site Manager
Drafts
Components
Categories
Content Collections
Forms Manager
Site Members
Advertising
Email Broadcaster
Mailing Lists
Permissions

Left panel menu items

This menu panel (located on the left of your page) is what you'll be accessing most often to perform the important functions of **Sava**. By default, the **Dashboard** menu is opened the first time you login to **Sava**.

2.4.4 The Details Pane



Dashboard

User Activity [\(Advanced Session Search\)](#)

Recent Activity		Member Activity	
Current Visitors (Last 15 Mins)	0	Current Members (Last 15 Mins)	0
Visits (Last 30 Days)	5	Member Visits (Last 30 Days)	5

Keyword Search
Search for a page you'd like to edit or add content to...

Site Summary

Active Pages	27
Files	8
Links	0
Internal Feeds	1
External Feeds	0

Popular Content (Last 30 Days)

Pages (View Report)	Top Referrers (View Report)
News (11 Views)	Unknown (7 Referrals)
Contact Us (3 Views)	—
About Us (1 Views)	—

Top Searches [\(View Report\)](#)

—
—
—

Top Rated [\(View Report\)](#)

—
—
—

Recent Content

- [Home](#)
- [Sign Up For News Alerts!](#)
- [A quick page](#)
- [About Us](#)
- [A message from our CEO](#)

Drafts for Your Review
There are currently no drafts for you to review.

Email Broadcasts (3/1/2007 - 3/26/2007)
Emails Sent: 0 Emails Allotted: **Unlimited** Emails Remaining: **Unlimited**

Title	Sent	Opens	Clicks	Bounces
There have been no emails sent with in last 30 days.				

Details Pane

The **Details Pane** displays panels, information, search and other fields required to perform tasks related to the menu item that was selected in the **Left Panel** menu. In the above example the **Details Pane** displays panels, fields and information related to the **Dashboard**.

2.4.5 The Site Selector



The Site Selector

The site selector is located above the left panel menu. Using its drop-down list you can select a site that you wish to maintain with **Sava**. The name of the selected site is displayed beside the field.



To select a site

1. Select a site from the drop-down list.

The web page refreshes and opens the **Dashboard** for the site.

The name of the selected site is displayed beside the drop-down list field.

2.5 Exiting the Application

Follow the procedure below to log off from Sava.

1. Click the **Logout** button below the menu bar.

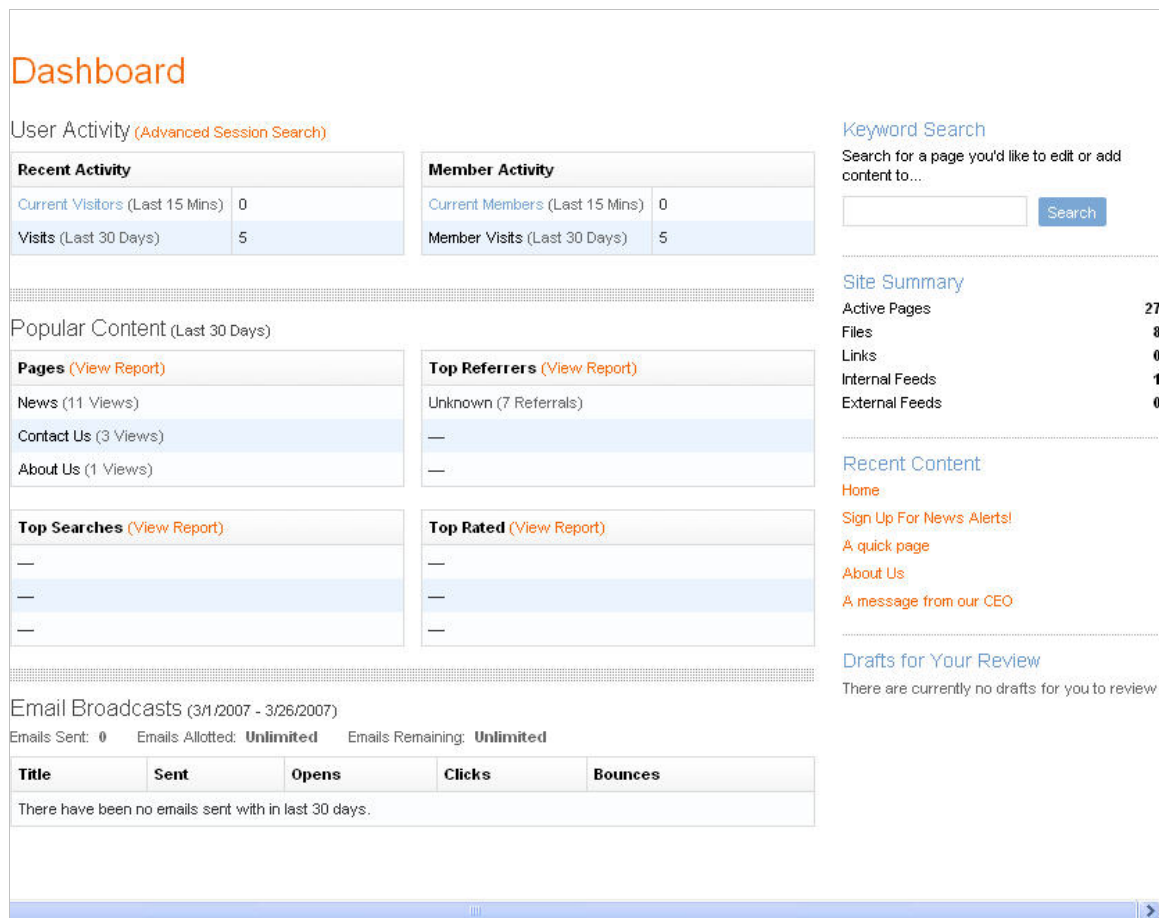
Note: Ensure that you have completed and saved whatever you are working on before clicking **Logout** on the menu bar. Please also take caution to log off by clicking **Logout** only. Do not use the back button of your Internet browser.

Web hosted customers working particularly in non-office environments must exit from the application when they are done so that the application is not left exposed to others.

3. The Dashboard

The Dashboard is the main monitoring area of your **Sava** application, where you can instantly gather information about a variety of activities such as site usage, page performance and other statistics of the selected site.

3.1 Dashboard Panels



Dashboard

User Activity ([Advanced Session Search](#))

Recent Activity		Member Activity	
Current Visitors (Last 15 Mins)	0	Current Members (Last 15 Mins)	0
Visits (Last 30 Days)	5	Member Visits (Last 30 Days)	5

Keyword Search
Search for a page you'd like to edit or add content to...

Site Summary

Active Pages	27
Files	8
Links	0
Internal Feeds	1
External Feeds	0

Popular Content (Last 30 Days)

Pages (View Report)	Top Referrers (View Report)
News (11 Views)	Unknown (7 Referrals)
Contact Us (3 Views)	—
About Us (1 Views)	—

Top Searches (View Report)	Top Rated (View Report)
—	—
—	—
—	—

Recent Content

- [Home](#)
- [Sign Up For News Alerts!](#)
- [A quick page](#)
- [About Us](#)
- [A message from our CEO](#)

Drafts for Your Review
There are currently no drafts for you to review.

Email Broadcasts (3/1/2007 - 3/26/2007)
Emails Sent: 0 Emails Allotted: **Unlimited** Emails Remaining: **Unlimited**

Title	Sent	Opens	Clicks	Bounces
There have been no emails sent with in last 30 days.				

The Dashboard

The **Details Pane** reveals four distinct panels. These are the horizontal **User Activity** panel, the **Popular Content** panel and the **E-mail Broadcasts** panel. Also included is the vertical panel on the right, displaying information on **Site Summary**, **Recent Content**, **Drafts for review** and **Keyword Search** capability.

3.1.1 The User Activity Panel

This panel reveals the site's user and member activity. Under **Recent Activity** you can find out the number of visitors in the last 15 minutes, hyperlinked **Current Visitors** and the number of **Visits** in the last 30 days to the site.

Click the **Current Visitors** link to find out who the current visitors were. The **Details Pane** refreshes to display this information.

All Sessions (Last 15 Minutes)				
Total Sessions: 0				
User	Country	Language	Last Request	Views
There are have been no sessions over the last 15 Minutes.				

Current visitors information

Similarly, under **Member Activity** you can find out the number of current members who visited the site in the last 15 minutes, hyperlinked **Current Members** and the number of **Member Visits** in the last 30 days to the site.

Click the **Current Members** link to find out who the current members visitors were. The **Details Pane** refreshes to display this information.

Member Sessions (Last 15 Minutes)				
Total Sessions: 0				
User	Country	Language	Last Request	Views
There are have been no sessions over the last 15 Minutes.				

Current member visitor information

3.1.2 The Popular Content Panel

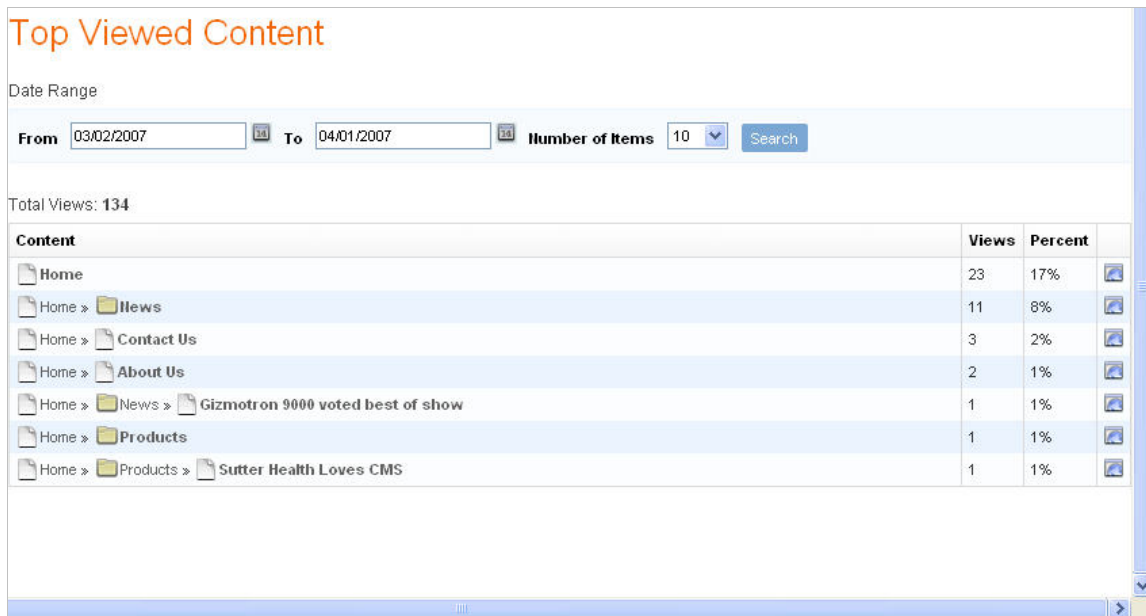
Popular Content (Last 30 Days)	
Pages (View Report) News (10 Views) Sutter Health Loves CMS (3 Views) Contact Us (2 Views)	Top Referrers (View Report) Unknown (15 Referrals) http://www.google.com/search?cl... (1 Referrals) http://www.google.com/hws/searc... (1 Referrals)
Top Searches (View Report) — — —	Top Rated (View Report) — — —

Popular Content Panel

This panel displays the pages receiving the most visits by surfers, as well as the top referrers (i.e., pages or sites referring to your site in the past 30 days).

The Popular Content panel has four sections, **Pages** section, the **Top Referrers** section, The **Top Searches** and the **Top Rated** section.

The **Pages** section displays results of the top visited pages of your site, as well as how many people visited them. Click **View Report** to see a detailed report that is displayed in the **Details Pane**. If there are more reported items than can fit on the page, use the scroll bars to access them.



Top Viewed Content

Date Range

From 03/02/2007 To 04/01/2007 Number of Items 10 Search

Total Views: 134

Content	Views	Percent
Home	23	17%
Home » News	11	8%
Home » Contact Us	3	2%
Home » About Us	2	1%
Home » News » Gizmotron 9000 voted best of show	1	1%
Home » Products	1	1%
Home » Products » Sutter Health Loves CMS	1	1%


Top Viewed Content

There are several activities that you can perform on this page.

- a) **Filtering and searching for top viewed content** – You can filter for top viewed content for a particular date range and can also restrict the display of the results to a particular number of items. To select a date for the **From** and **To** fields, click the **Calendar** button associated with the field. A calendar dialog opens, displaying dates of the current month on your computer.



Date selection from the calendar dialog

To select dates for previous or future months, click on the *previous* and *next* buttons adjacent to the **Month** and **Year** cell.  For number of items to be displayed, select a value from the **Number of Items drop-down** list. Finally, click **Search** to display the top pages filtered by your criteria.

- b) **Viewing the contents of popular pages** – To do this simply click on a page (for example, the **Sutter Health Loves CMS** page). A new browser window opens to display the page. Note that all the pages displayed under the **Top Viewed Content** page are hyperlinked and indicated in bold.

 Home »  Products »  **Sutter Health Loves CMS** . Alternatively, you can also display the contents of the page by clicking the **Display Contents**  button located at the end of the record for the page in the table on the right.

Note: The Top Viewed Content report or page can also be accessed by clicking on the **Top Content** menu item under that **Dashboard** menu item on the **Left Panel** menu.

The **Top Referrers** section lists the pages from where your site and its pages were accessed in the past 30 days. Unknown referrals are those whose page or site information cannot be determined. Known referrals are hyperlinked and clicking them will open a new browser window to display the details of the page from where your website or page was accessed.

For a detailed report, click the **View Report** link of the section, and the report is generated in the **Details Pane**.

Top Referrers

Date Range

From To Number of Items

Total Referrals: 17

Referrer	Count	Percent
Unknown	16	94%
http://www.google.com/news/search?client=dell-usuk&adsafe=high&safe=high&channel=us-pp&hl=en&ibid=5070306&q=blueriver.com	1	6%

As in the **Top Content** report, you can filter and display results by setting criteria using the **From**, **To** and **Number of Items** fields. You can also view the page in a new window by clicking the referrer's page, as it is hyperlinked in the report.

Note: The Top Referrers report or page can also be accessed by clicking on the **Top Referrers** menu item under that **Dashboard** menu item on the **Left Panel** menu.

The **Top Searches** section displays the keywords that were used to search for related content on the pages of the site. Click the **View Report** to get a detailed analysis in the **Details Pane**.

Top Searches

Date Range

From To Number of Items

Total Searches: 0

Keyword	Count	Percent
Your search returned no results		

Top Searches report

As in the previous reports, you can filter and display results by setting criteria using the **From**, **To** and **Number of Items** fields.

Note: The Top Searches report or page can also be accessed by clicking on the **Top Searches** menu item under that **Dashboard** menu item on the **Left Panel** menu.

Finally, the **Top Rated** section displays the most popular content of the website. Click the **View Report** link of the section to view a detailed report of the same.

Top Rated Content

Date Range

From To Minimum Votes Required No. of Items

Content	Average Rating	Votes
Your search returned no results		

Top Rated Content report

As in the previous reports, you can filter and display results by setting criteria using the **From**, **To** and **Number of Items** fields.

Note: The Top Rated Content report or page can also be accessed by clicking on the **Top Rated** menu item under that **Dashboard** menu item on the **Left Panel** menu.

3.1.3 E-mail Broadcasts Panel

This panel displays the details regarding e-mails sent, allotted and ones remaining.

Email Broadcasts (4/1/2007 - 4/2/2007)

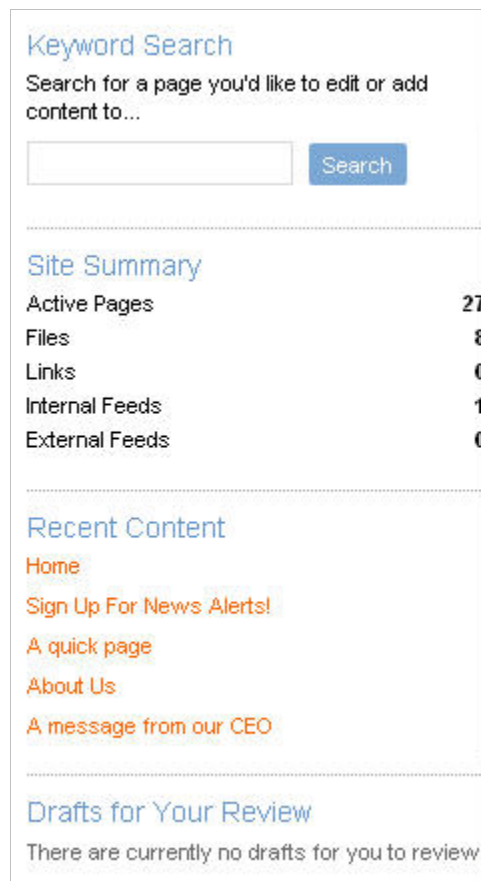
Emails Sent: 0 Emails Allotted: **Unlimited** Emails Remaining: **Unlimited**

Title	Sent	Opens	Clicks	Bounces
There have been no emails sent with in last 30 days.				

E-mail Broadcast panel

3.1.4 The Vertical Panel

The Vertical Panel displays information about the website, quick links to content and pages, and a search tool to search for content.



The Vertical Panel is a dashboard component with a white background and a thin border. It is divided into four sections by horizontal dashed lines. The first section is titled 'Keyword Search' in blue text. Below the title is a sub-header 'Search for a page you'd like to edit or add content to...' followed by a text input field and a blue 'Search' button. The second section is titled 'Site Summary' in blue text. It contains a list of metrics: 'Active Pages' (27), 'Files' (8), 'Links' (0), 'Internal Feeds' (1), and 'External Feeds' (0). The third section is titled 'Recent Content' in blue text and lists five items: 'Home', 'Sign Up For News Alerts!', 'A quick page', 'About Us', and 'A message from our CEO'. The fourth section is titled 'Drafts for Your Review' in blue text and contains the text 'There are currently no drafts for you to review.'

The Vertical Panel

In the **Keyword Search** panel enter a keyword or keyword phrase for the content you would like to find and click **Search**. The details will be displayed in the **Details Pane**. Using the **Site Manager**, you can then edit this page. These will be explored in the **Site Manager** chapter.

The **Site Summary** section gives you details of the number of Active Pages, Files on the site, incoming Links, Internal Feeds and External Feeds.

The **Recent Content** section provides you links to recent content and pages that are being edited or maintained by you. Clicking them will take you to the View History page of the selected item in the **Details Pane** and the appropriate menu item in the **Left Panel** menu will be opened. For example, clicking on **Home** opens the **Site Manager** menu item from the **Left Panel** menu.

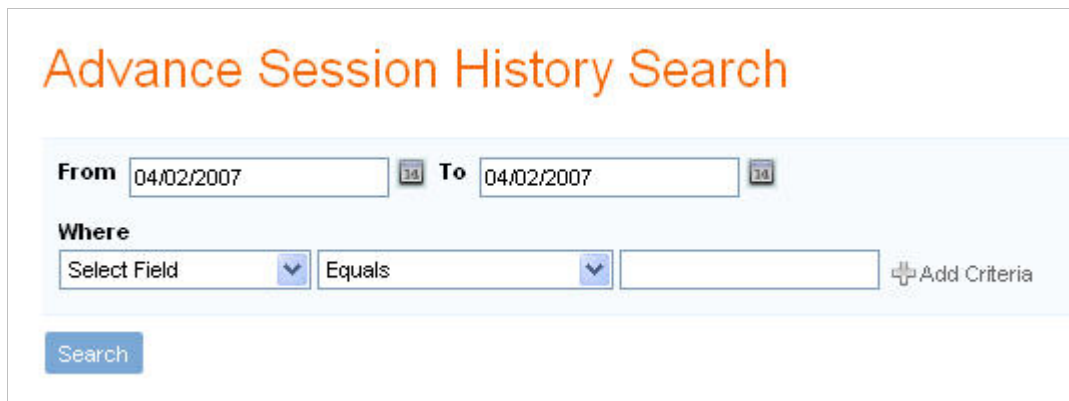
The **Drafts for Your Review** section lists the recent drafts that you were working on. They are hyperlinked for convenience and can be accessed easily.

3.2 Session Search


Use the session search to perform an intensive session search and define new criteria.

To perform a session search

1. Click the **Session Search** menu item under **Dashboard** from the **Left Panel** menu. The web page refreshes and displays the **Advanced Session History Search Page** in the **Details Pane**.




The Advanced Session History Search page

2. Select dates for the From and To fields by clicking on the calendar  buttons and selecting a date from the **Calendar** dialogs.
3. To create a condition, select a field from the **Where** drop-down list.
4. Select a relation from the second drop-down list field.
5. Enter a value for that field and the relation in the third empty field.
6. Click **Search**.

Sava does a search and reports if any sessions matching the criteria were found.

To add a second condition to the first

1. Click the plus button or the Add Criteria  link adjacent to the plus symbol.
2. A new set of fields to create the second condition is displayed.

Advance Session History Search

From To

Where

Keywords Equals

And Equals

Adding conditions

3. Create a new condition using the new set of fields or you can delete the new set of fields by clicking **Remove Criteria**.
4. To add more criteria click the **Add Criteria** link that appears beside each new set of fields.
5. Finally, click **Search** to perform the search.

3.3 Top Viewed Content

See the [Top Viewed Content](#) section in the [Popular Content Panel](#) topic for more information.

3.4 Top Referrers

See the [Top Referrer](#) section in the [Popular Content Panel](#) topic for more information.

3.5 Top Searches

See the [Top Searches](#) section in the [Popular Content Panel](#) topic for more information.

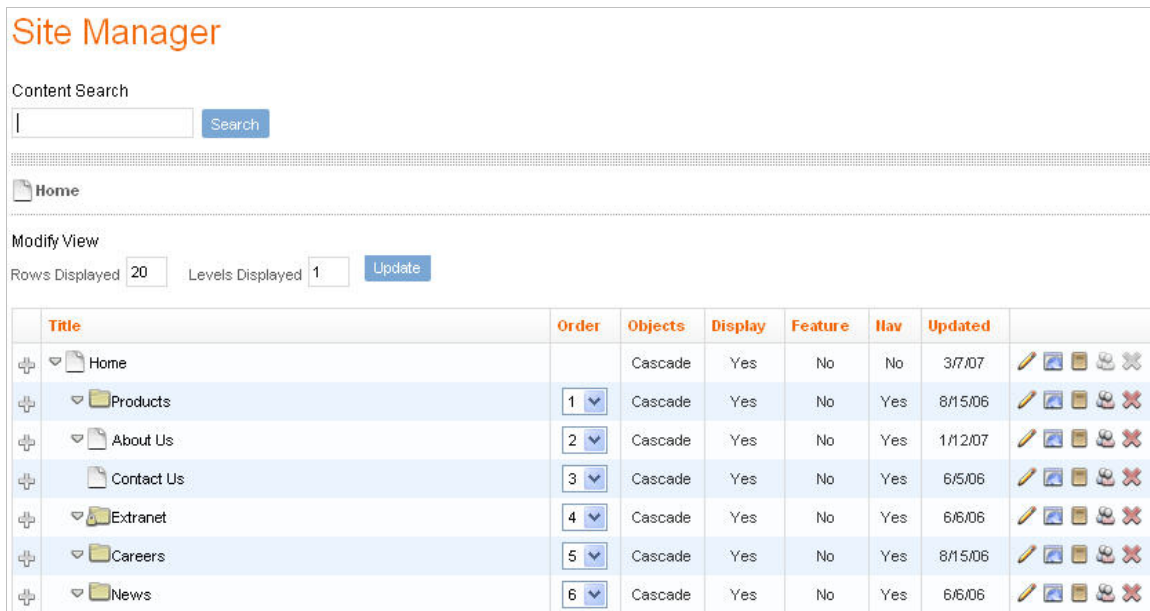
3.6 Top Rated Content

See the [Top Rated Content](#) section in the [Popular Content Panel](#) topic for more information.

4. Site Manager

Site Manger is the primary tool for organizing and maintaining your website content. It provides several features for viewing your site structure, allowing you to easily locate content in large websites. Some key tools include content search, content ordering, user permissions for editing content, and version histories.

Click on Site Manager from the **Left Panel** menu to view it in the **Details Pane**.



The screenshot shows the Site Manager interface. At the top, there is a 'Content Search' field with a 'Search' button. Below this, the 'Home' folder is selected and displayed. A 'Modify View' section includes 'Rows Displayed' set to 20 and 'Levels Displayed' set to 1, with an 'Update' button. The main content is a table with the following columns: Title, Order, Objects, Display, Feature, Hlav, and Updated. The table lists several folders and their properties.

Title	Order	Objects	Display	Feature	Hlav	Updated	
Home		Cascade	Yes	No	No	3/7/07	[Edit] [View] [Refresh] [Delete]
Products	1	Cascade	Yes	No	Yes	8/15/06	[Edit] [View] [Refresh] [Delete]
About Us	2	Cascade	Yes	No	Yes	1/12/07	[Edit] [View] [Refresh] [Delete]
Contact Us	3	Cascade	Yes	No	Yes	6/5/06	[Edit] [View] [Refresh] [Delete]
Extranet	4	Cascade	Yes	No	Yes	6/6/06	[Edit] [View] [Refresh] [Delete]
Careers	5	Cascade	Yes	No	Yes	8/15/06	[Edit] [View] [Refresh] [Delete]
News	6	Cascade	Yes	No	Yes	6/6/06	[Edit] [View] [Refresh] [Delete]

The Site Manager page in the Details Pane

Note that the folder whose contents (subfolders and files) are displayed on this page is indicated just below the **Content Search** field. In the image above, the **Home** page/folder is displayed. By default, the Site Manager displays the contents of the **Home** page. The folder name or address is hyperlinked; clicking the folder or subfolder takes you to the page displaying the contents of the folder.

The various functions of the **Site Manager** page are explained below.

4.1 Content Search

This topic explains how to use the Content Search feature in Site Manager. **Content Search** is used to find a specific content element, such as a page. It works by entering keywords and selecting the content title from the search results.

To perform a search

1. On the **Site Manager** page enter key words in the **Content Search** field.

Content Search

Content Search field

2. Press **Enter** on your keyboard or click **Search**.

The web page refreshes to display the results in the **Details Pane**.

Site Search

Keyword Search

Title	Display	Update	
Home » About Us » A message from our CEO	Yes	6/6/06	

Content Search Results

You can perform various actions on the searched results such as editing using the **Edit** button, previewing with the **Preview** button, checking version history using the **Version History** button, setting permissions using the **Permissions** button, deleting using the **Delete** button and several other functions. These will be explained in the next chapter, [Working with Content](#).

4.2 Views: Rows, Depth, Zoom

By default, the Site Manager displays 20 results per page up to the first level. However, this can be changed.

To modify the number and level of results

1. Enter a value in the **Rows Displayed** field.
2. Enter a value in the **Levels Displayed** field.
3. Click **Update**.

The web page refreshes to display the results according to the changes input into the fields.

Note: By default a level 1 of details are displayed. This means that under the home page all folders and pages will be displayed. For a level 2 apart from what is displayed under level 1, the folders and pages of the folders under the home page will also be displayed and so on.

Results can also be sorted by particular fields and in ascending or descending orders. The fields for the same are displayed when you zoom into the results such as in the results of a keyword search. Zooming will also be explained in a subsequent topic.

To sort the results

1. Select a field and the order of sort (ascending or descending) by which you want the results to be sorted from the drop-down fields of the Sort Navigation panel.




Sort Navigation fields

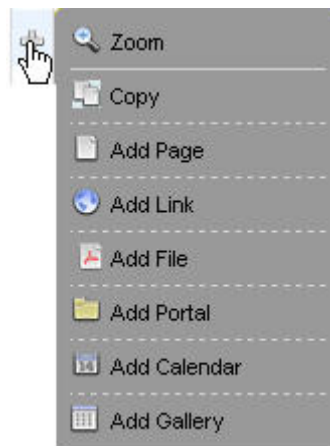
2. Click **Update**.

The web page refreshes to display the results according to the selected choices.

Note: If the **Sort Navigation** fields are not visible then position the mouse on the plus button of the record and select **Zoom** from the shortcut menu that appears. The shortcut menu will be dealt in the next topic.

Using the shortcut menu

Sava uses a shortcut menu to perform additional functions on a record. To invoke the shortcut menu simply point your mouse on the plus sign  of a record. The Shortcut menu appears instantly as shown below.



Shortcut menu

Using the functions of the shortcut menu is explained in detail in the [Working with Content](#) chapter.

What is Help

Mouse over a column name such as **Title**, **Order**, **Objects**, **Display**, **Feature**, **Nav** and **Updated** and **Sava** displays a “what is help” about the column as shown below.



What is Help for the Objects column

4.3 Ordering Content

Within a page, folders and pages can be ordered for display. The order is indicated by the value associated with the page or folder record under the **Order** column. By default, all pages are ordered based on the date they are entered. However, **Site Manager** allows you to change the order of a page or group of pages, which affects how navigational links are displayed on the site.

To change the order of a page or group of pages

1. Locate the content item in the Site Manager for which you wish to change the order and select an order number from the Order drop-down list.
2. Click **Update**.


The web page refreshes to display the new order.

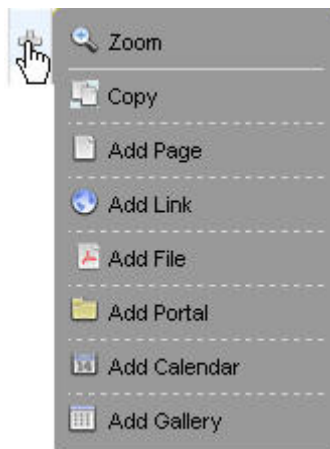
Note: Within groups of pages or folders you can further align pages and subfolders using the same procedure.

5. Working with Content

Sava offers a variety of tools for both editing and the post-editing process. This chapter explains in detail the same.

5.1 Creating Content






To create content use the shortcut menu. The shortcut menu can be invoked by pointing the mouse to the plus button  of a record of a page or group of pages in the table.




Shortcut menu

A variety of content can be created. You can also create a page by copying the details from an existing page.

Before we do that let us explore the different kinds of content you can create. The following table explains them in brief.

Type of Content	Description
	Page - Page content types are the website pages of your site. These are the most commonly used content types containing text, images and links.
	Link - Link content types are links to other content items. They can be used to link to other websites from the main site or to another section of your existing website.
	File - File content types are files that have been uploaded to and managed from File Manager. File icons denote common file types such PDF (shown), Word, Excel, Zip and others.
	Portal - Portal content types allow you to aggregate related content into a defined group. It has no content of its own, but displays both title and summary of each content item within the group.
	Calendar - Calendar content types allow you to display scheduled content in a traditional calendar format. Content placed under a calendar is scheduled by its "Start/Stop Dates"

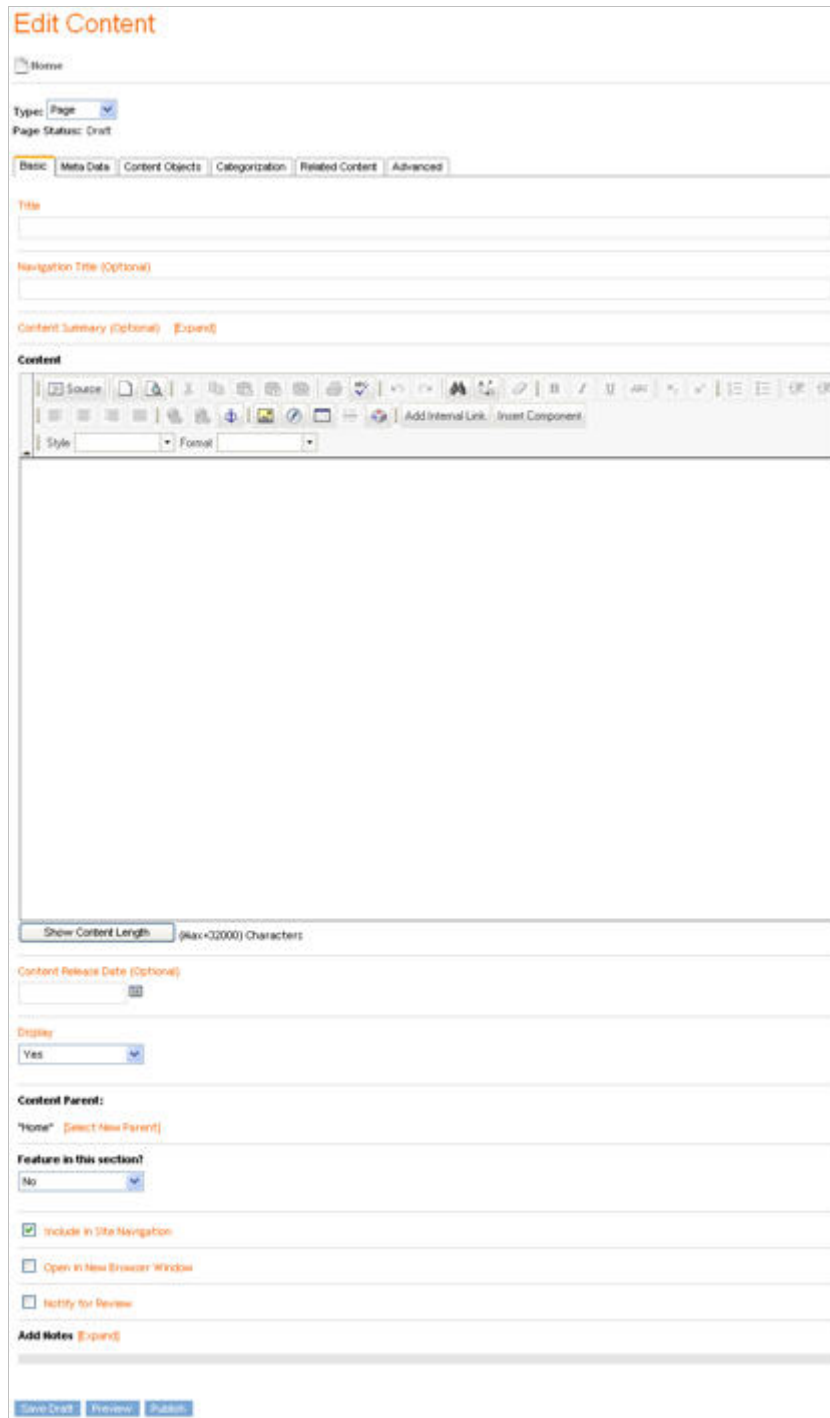
 A small icon representing a gallery, showing a grid of four squares.	Gallery - Gallery content types are collections of images. They allow you to aggregate and display images as galleries.
--	--

This topic explains how to add content to your website. The steps are the same for adding any of the six content types: Page, Link, File, Portal, Calendar and Gallery. In the example we'll add a page to the **Home** page.

To add content

1. Mouse over the plus button of the record of the **Home** page and from the shortcut menu select **Add Page**.

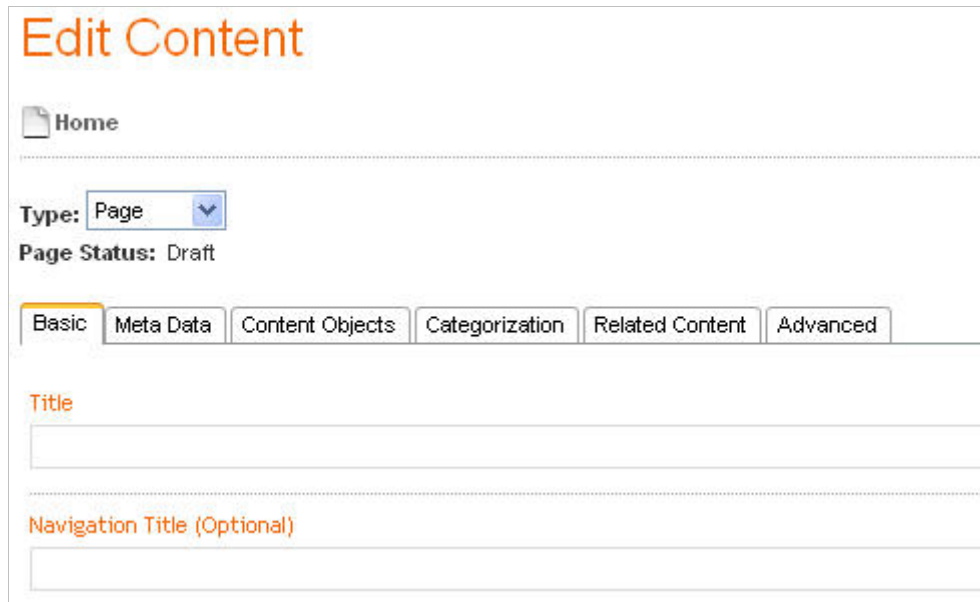
The web page refreshes to display the **Edit Content** page for adding the new page.



Edit Content page for the new page under the home page

We will look into the **Edit Page** in detail under [Editing Content](#) but here are some of the basics.

The Page or Portal you are creating is displayed for you to work with.



The screenshot shows the 'Edit Content' interface. At the top left is the 'Home' icon. Below it, the 'Type' is set to 'Page' in a dropdown menu, and the 'Page Status' is 'Draft'. A row of tabs includes 'Basic', 'Meta Data', 'Content Objects', 'Categorization', 'Related Content', and 'Advanced'. The 'Basic' tab is active. Underneath, there are two text input fields: 'Title' and 'Navigation Title (Optional)'.

The initial fields of the Edit Content page

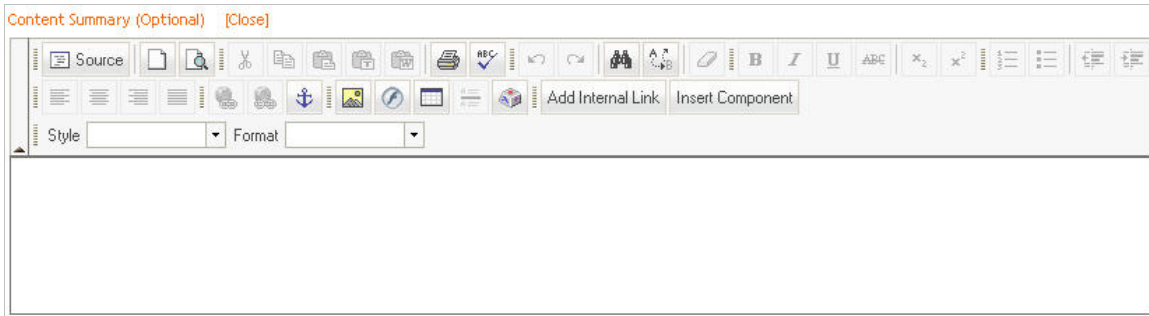
2. Select a type for the page being created from the **Type** drop-down list. This step needs to be performed only if you have decided to change the type.
3. Enter a complete title for the page in the **Title** field. The title will display as the headline on a page that features the content item.

Note: We will limit the explanation to the **Basic** tab. The remaining tabs will be explained in the [Editing Content](#) section.

4. Enter a label used to link the content item throughout the site in the **Navigation Title** field. It is used to refer to the item in site navigation. Shorter titles are recommended for this field. This step is optional.

Next come the **Content Summary** and **Content** boxes where the content is created.

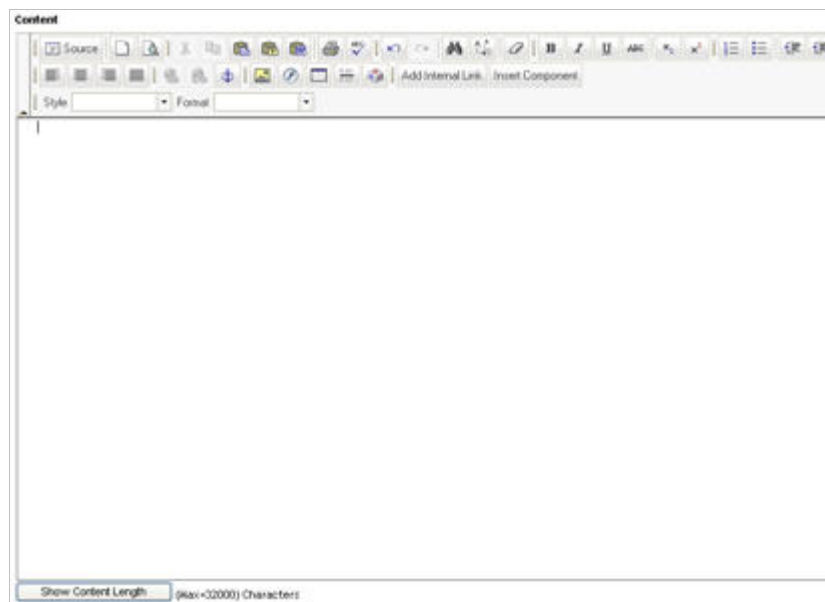
5. Enter a summary of the content item in the **Content Summary** box. The summary will display under the title when used in a portal. This step is optional. This box by default is not enabled. To view it, click the **Expand** link. The box is displayed.



Content Summary box expanded

You can collapse the box by clicking the **Close** link.

6. Enter a summary for the content inside the box. You can edit the content by using the tools of the word processor inside the box.
7. Finally enter the contents of the page in the Content box. As with the **Content Summary** box, you can edit the content by using the tools of the word processor inside the box.



Content Box

Most of the tools and buttons of the box are self-explanatory. The others are explained here. At any stage you can find out the number of words of the content you have created by clicking the **Show Content Length** button at the bottom of the box.

Add Internal Link button - Uses the CMS to select a link within the site (not an external link to a different site). Because the selection of the internal link happens within the CMS, this link reference is always maintained accurately even if a target page is moved or renamed.

To create an internal link

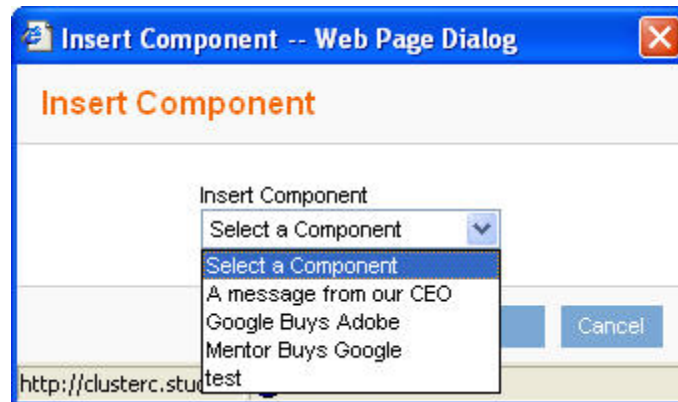
- 7a. Highlight target text for link.

- 7b. Click **Insert Link**.
- 7c. Find link target page (or file) by searching using keyword matching title of target page.
- 7d. In the search results page, select correct page by clicking radio button control in right column.
- 7e. Confirm selection.

Insert Component button – This inserts a pre-built component into a page's content. This component can then be edited or otherwise manipulated. This procedure is most frequently used to insert a page layout component (almost like a mini-template) into a page.

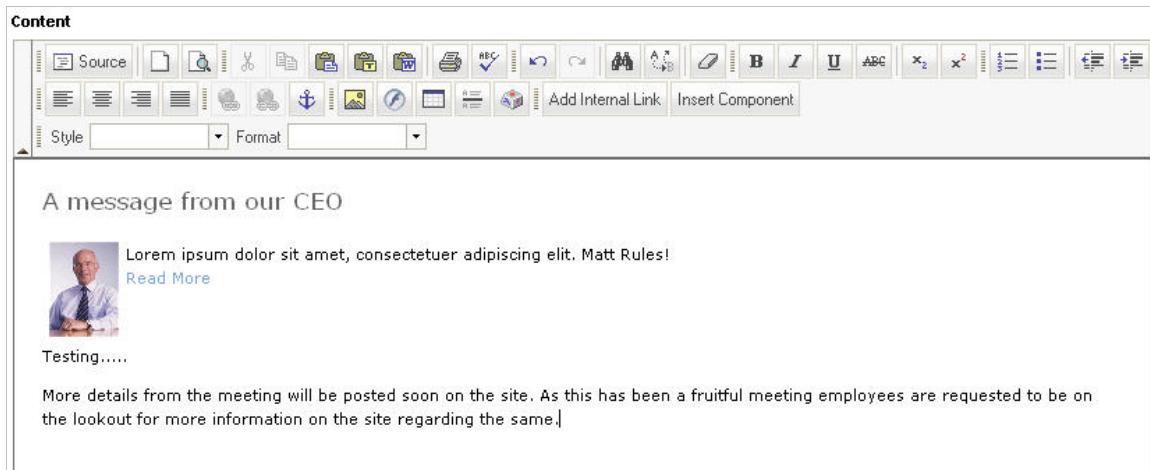
To insert a component button

- 7f. Inserts cursor to the part of the page where you wish to place component.
- 7g. Click **Add a Component**. A dialog with a list of components created in the system appears.



Insert Component dialog

- 7h. Select the component from dropdown list.
- 7i. Click **OK**.
- 7j. The component is inserted into the contents.




Component inserted in Content


Note: Most frequently, components are added to a page via the "content objects" tab. In this usage, the component is more like an "include", and is a reference to the "parent" component in the Components list. If this parent component is edited, all references to the component throughout the site reflect these changes. If a component is added via "Insert Component" it just becomes part of the page's content, and the relationship between it and the parent component are severed.

The next section of the **Edit Content** Page deals with publishing of the page.

Content Release Date (Optional)

Display

Yes 

Content Parent:

"Home" [\[Select New Parent\]](#)

Feature in this section?

No 

[Include in Site Navigation](#)

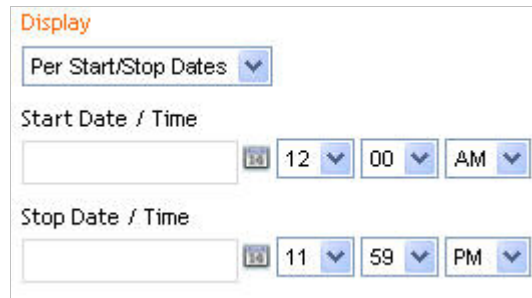
[Open in New Browser Window](#)

[Notify for Review](#)

Add Notes [\[Expand\]](#)

Publishing section of Edit Content page

8. Enter a date for the release of the content on the home page in the **Content Release Date** field. This date is optional. Content will appear at 12 a.m. on the date that you select. To enter a date, click the calendar button located on the right end of the page and select a date from the **Calendar** dialog.
9. Select an option from the **Display** drop-down list to display, not display or set a time period to display the content. If you select the **Per Start/Stop Dates** additional fields for Date and Time are displayed.



Start Stop date and time fields

10. Select date and time using the Calendar buttons and drop-down lists.
11. To select a new parent for this page that you are creating, click the **Select New Parent** link of the **Content Parent** section. Note that the default parent “Home” is already displayed. Clicking the link displays a search field to search for parents.



Content parent search field

12. To search for a parent or portal enter a few characters into the field and click **Search**. Sava displays parents related to the search characters input.



Search results for parent

13. Select a parent or portal by selecting the appropriate radio button associated with the parent.
14. If the parent content item allows features, you can feature this content’s page title and description on all child content items. Select "Yes" if you want the content item to be featured. Select "No" if you do not want it featured. Select "Per Start/Stop Dates" to schedule when your content appears and is removed from the site. If this option is selected, additional fields appear to enter dates and time as shown below.



Additional Date and Time fields for Per Start/Stop Dates option

15. Select the **Include in Site Navigation** checkbox to display the menu title of the content item as a navigation menu item of the site.
16. Select the **Open in a New Browser Window** checkbox to open the content item in a new window. Additional fields are displayed.



Open in a New Browser Window fields

17. Use the controls to define the display attributes of the new window. **Height**, **Width**, **Top** and **Left** specify the size of the window in pixels. All other options are elements and features of the browser window that displays the content.
18. Check the **Notify for Review** checkbox to notify other **Sava** users of the changes you've made to the content. Select the users you want to notify and enter a personalized message to the group, which will be sent by e-mail. This will enable a workflow for the review of the document.



Notify for Review fields

19. Finally, you can add notes about the contents of the page in the Add Notes box by clicking the associated **Expand** link. A box appears, and notes can be added into the box.
20. You now have the choice to either save a draft, preview or publish your page by clicking the **Save Draft**, **Preview** or **Publish** buttons.

Clicking the **Publish** button publishes the page. The **Preview** button takes you to the **Edit Content** page where you can further edit the page, and view additional options. The **Save Draft** function saves the page that can be reviewed and published later.

Using the above steps you can create the basic page that was dealt under the Basic tab. However you can fine-tune your page using additional controls under the other tabs.



The Tabs of the Edit Content page

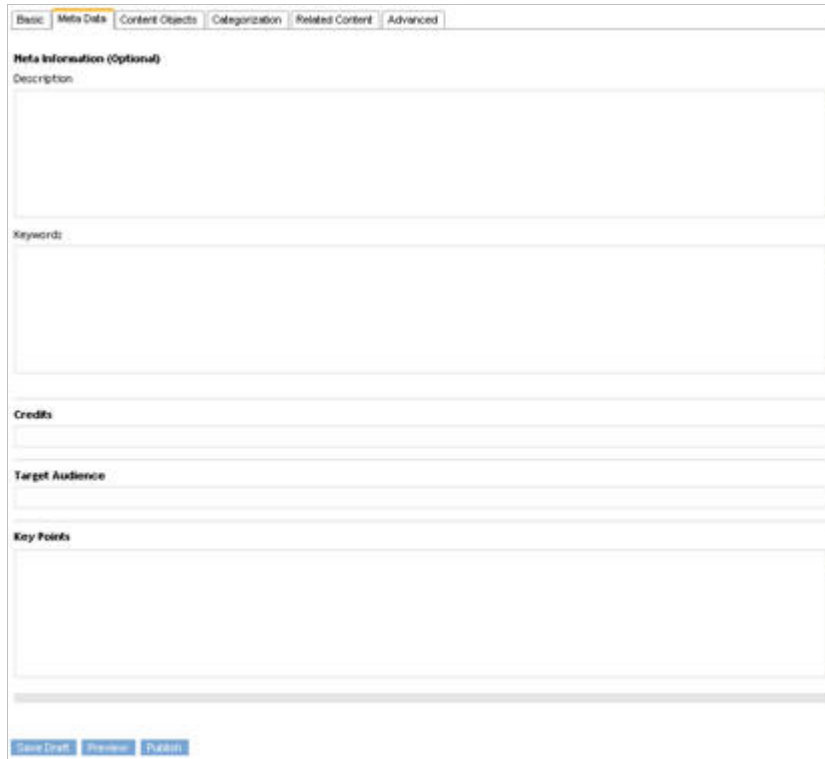
We will now explore each of them.

5.1.1 Meta Data

Meta data refers to keywords related to the content of the page you are creating and descriptions (involving keywords) of the page. This information is used to index the content item with external search engines.

To add Meta Data information

1. Click the **Meta Data** tab. The following fields are displayed.



Meta Data fields

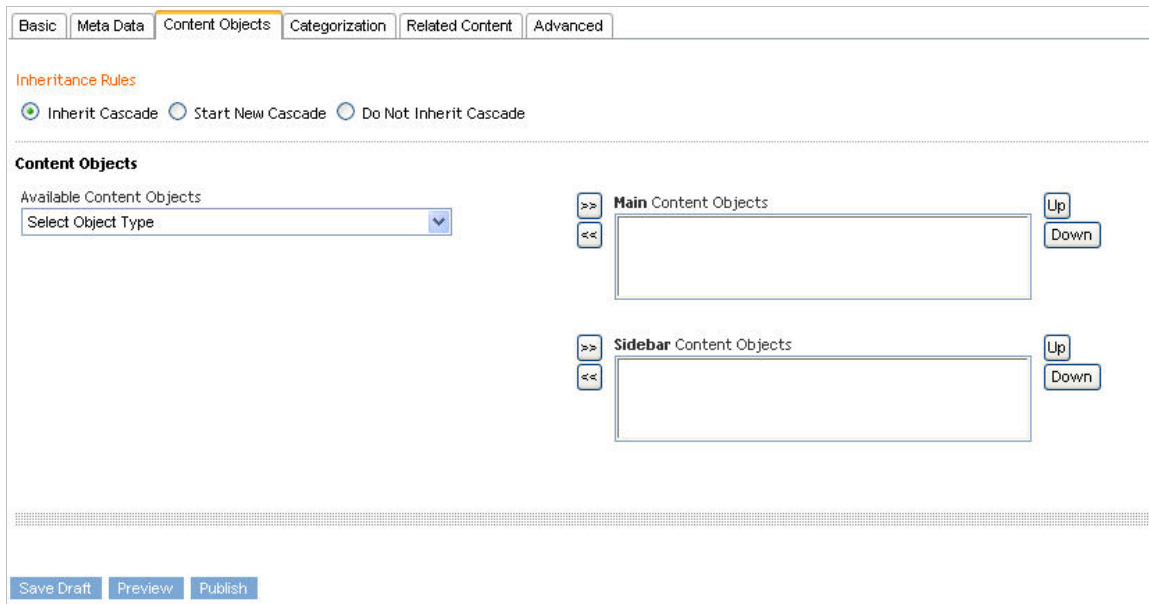
2. Enter information into the fields. The two most important fields are the **Description** and **Keywords** fields. Enter relevant keywords of your content here.

5.1.2 Content Objects

Optionally, click the **Content Objects** tab to manage content objects that are displayed on the page. Content Objects can be inherited from parent content items (pages or portals) and can also be cascaded down to child content items.


To manage content objects

1. Click the **Content Objects** tab.
2. The fields of the tab are displayed.





Content Object fields

3. Select an inheritance rule by selecting the appropriate radio button. Select **Inherit Cascade** to inherit the content objects from the parent content item. Select **Start New Cascade** if you want any child content items to inherit these content objects. Select **Do Not Inherit Cascade** if you do not want to inherit the content objects from the parent content item.
4. When you select a content object type, a list of available content objects is displayed in a box below the drop-down list field. In the example below the System content object type is selected.



Content objects related to System

5. Select and add those content objects to areas of the page template, such as the **Main** or **Sidebar** sections. To do this, select an object from the box and use the right-arrows  button to add a content object to the **Main** or **Sidebar** boxes. Use the left-arrows  button to remove a content object. Order content objects within a section of the page by selecting an object and moving it one up in the list by clicking

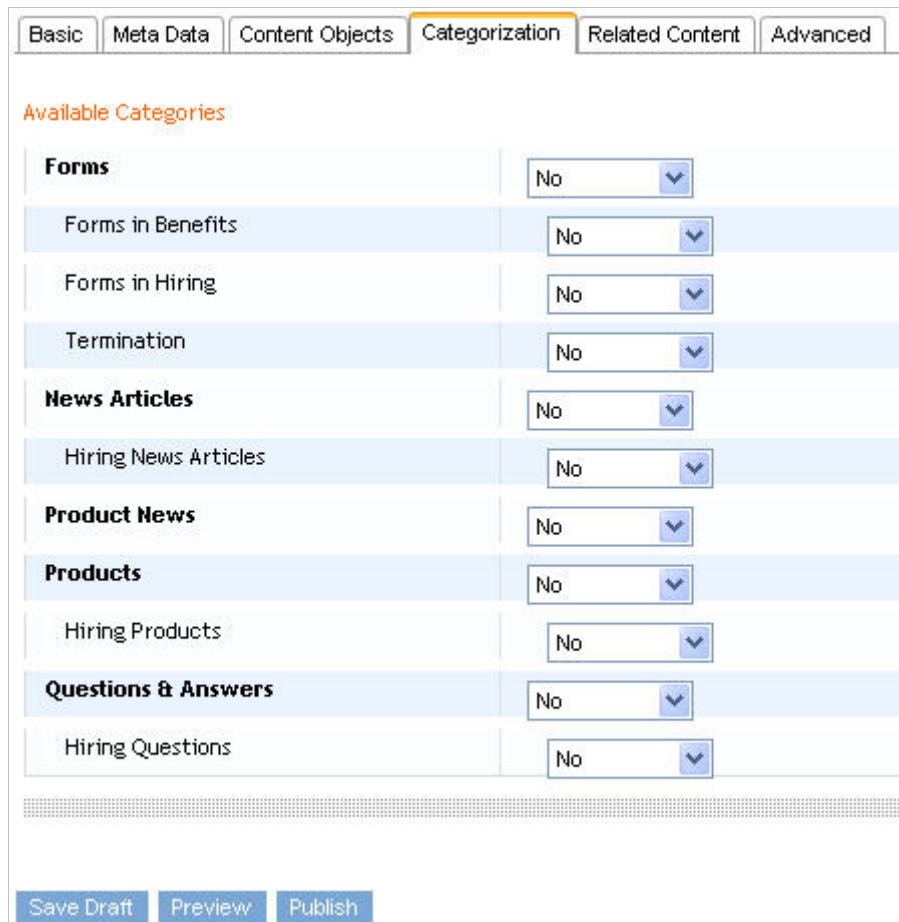
the **Up** button or move it one step down in the list by clicking the down **Down** button.

5.1.3 Categorization

You can categorize your content into relevant groups and categories.

To categorize the content

1. Click the **Categorization** tab. The fields of the tab are displayed.



Category	Status
Forms	No
Forms in Benefits	No
Forms in Hiring	No
Termination	No
News Articles	No
Hiring News Articles	No
Product News	No
Products	No
Hiring Products	No
Questions & Answers	No
Hiring Questions	No

Save Draft Preview Publish

Categorization fields

2. Select from the relevant drop-down lists the related categories for your content.

5.1.4 Related Content

You can associate and link other content items to the current content that you are creating or linking.

If there is no related content the following fields are displayed when the **Related Content** tab is clicked.

Basic	Meta Data	Content Objects	Categorization	Related Content	Advanced
-------	-----------	-----------------	----------------	-----------------	----------

Related Content: [Add Related Content](#)

Content Title	Type
There is currently no related content.	

Save Draft Preview Publish

Related Content fields

To add related content

1. Click the **Related Content** tab.
2. Click the **Add Related Content** link. The **Search for Content** field is displayed.
3. Enter keywords related to the content you want to link to and click **Search**.
4. The results, if found, are displayed as shown below.

Related Content:
Search for Content

news

Select New Related Content

Home » Members » Member News	+
Home » News	+
Home » News Feeds	+

Content Title	Type
News Feeds	Page <input type="button" value="X"/>

Search results for Related Content

5. Click the add icon **+** to add and relate the content item. To remove a related content item, click the delete icon **X**.

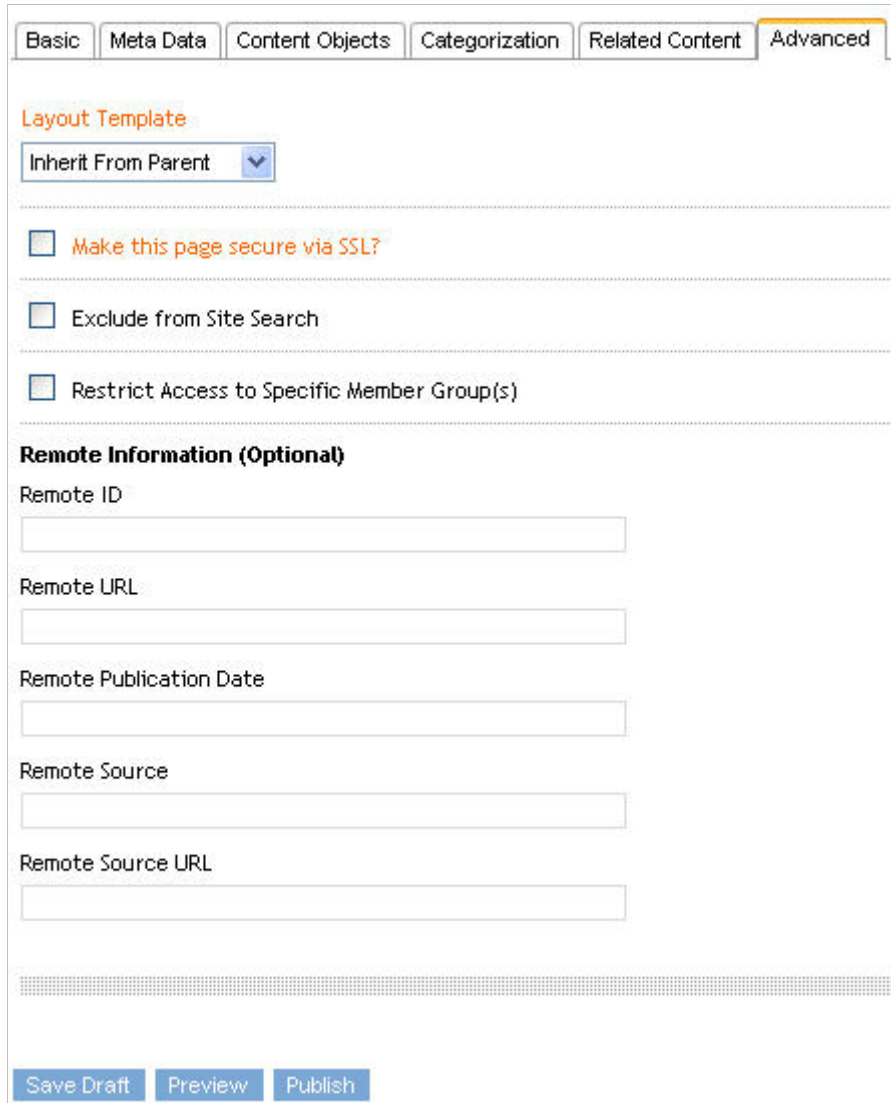
Note: Related Content is a System content object type. It must first be added to the content item as a content object (see previous step) in order to be displayed as Related Content.

5.1.5 Advanced

You can set several other advanced features such as adding security via SSL.

To set advanced features

1. Click the **Advanced** tab. The following fields are displayed.




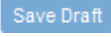
Advanced Tab fields

2. Select a layout template from the Layout Template drop-down list. This template will format the page content. By default, the content item will inherit the layout file of the parent content item.
3. To make the page secure via SSL (Secure Sockets Layer) check the **Make this page secure via SSL** checkbox.
4. Check the **Exclude from Site Search** checkbox to keep the content item from being found in a user search.
5. Check the **Restrict Access to Specific User Group(s)** checkbox to restrict content item access to only specific user groups. A list of user groups is displayed.
6. Select group or groups. Multiple groups can be selected by holding down the Control (Ctrl) key and selecting with your mouse.

7. Enter other information into the fields as appropriate.


Finally do one of the following:

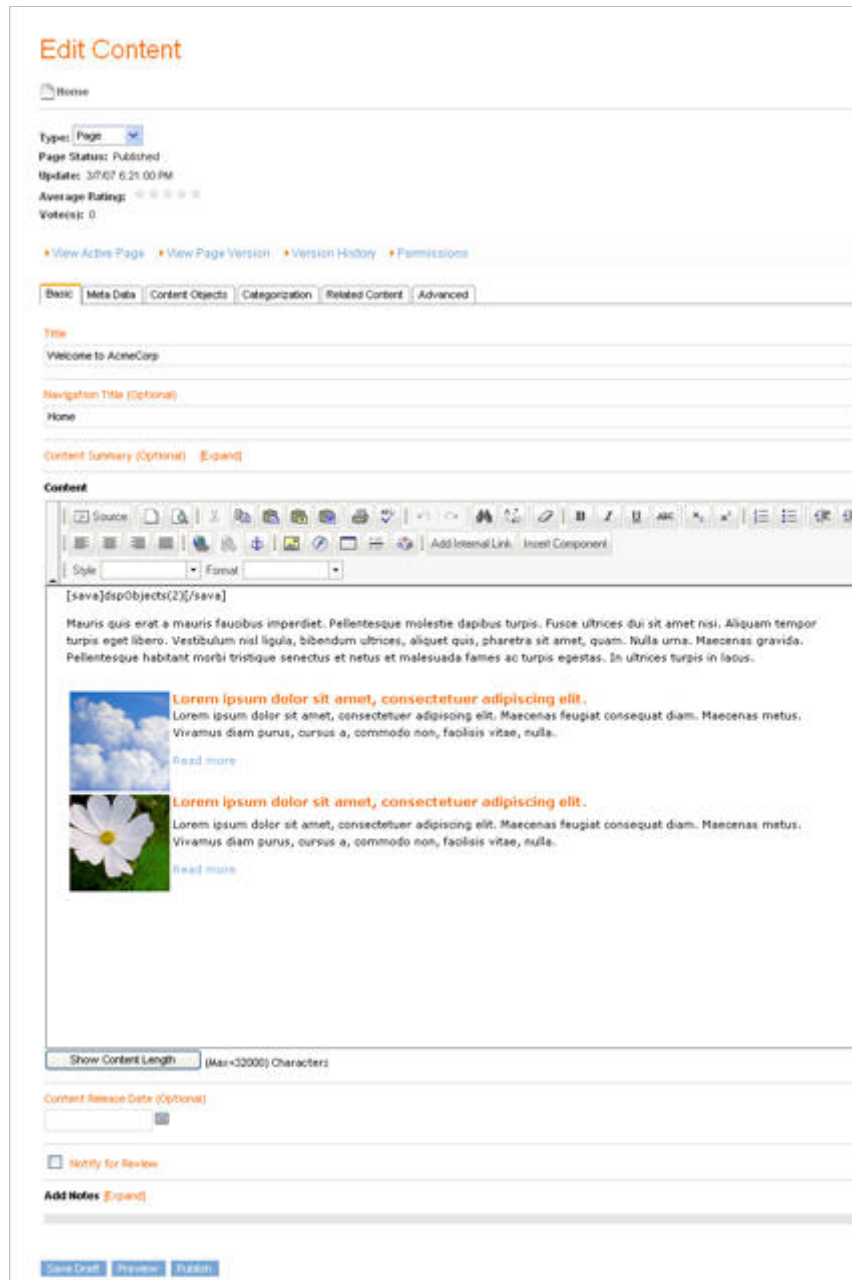
Click the **Preview** button  to see a preview of the finished content item in the web browser. A new window will open, so you can close it when you are done previewing the content item.

Click the **Save Draft** button  to save the content item in its current state, without publishing to your live website. This is useful when you need other people to view, edit or approve the content item before publishing.

Click the **Publish** button  to publish the content item to your live website.

5.2 Editing Content

Any page or group of pages can be edited by clicking its link in the table (the table on the **Site Manager** page) and the **Edit Content** page for that item that was clicked opens for editing. In the example the **Home** page was clicked from the table. The **Edit Content** page for the Home page opens. You can also invoke the **Edit Content** page by clicking the **Edit** button  associated with the page or portal.



Edit Content Page for the Home page

You can perform all the functions that you have learned in the previous section on creating content. In this section we will look at additional functionality of the **Edit Content** page, particularly the links as shown in the image below.

[▶ View Active Page](#) [▶ View Page Version](#) [▶ Version History](#) [▶ Delete Page](#) [▶ Permissions](#)

Additional links on the Edit Content page

5.2.1 View Active Page

Click this link to view the page in a new browser window that is currently published to the web. This will give you a feel for how the page is displayed in a browser. Close the new window after viewing the page.

5.2.2 View Page Version

The View Page Version also displays the current page in a new window of your Internet browser. The difference from **View Active Page** is that this page hasn't been published on the web yet, so you can make changes to the page before publishing it. This helps you test your page without publishing it. Close the new window after viewing the page.

5.2.3 Version History

Click this option to view the version history of the page. From this page you can also edit a current or previous version and save, preview or publish that version of the page. As content items are added and updated, previous versions are automatically archived in Site Manager. If needed, you can republish a previous version making the active version of that content item.

Versions of **Drafts** and **Published** content items are managed separately. Each time a draft is saved, the previous draft is archived in the version history. Once the content item is published, however, all previous draft versions are deleted and no longer available. There will be one published version. When the content item is published again, the previous published version will be archived in the version history.

To view and manage version history


































1. Click the **Version History** link.

The version history for the page is displayed.

Version History




Home > About Us

Clear Version History Delete Page

Title	Notes	Status	Display	Objects	Feature	Ilav	Update	Time	Author/Editor	
About Us		Published	Yes	Cascade	No	Yes	1/12/07	10:45 PM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	10/4/06	10:59 AM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/6/06	10:29 AM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/6/06	8:42 AM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/6/06	8:42 AM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/6/06	8:40 AM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/5/06	4:59 PM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/5/06	4:58 PM	Studio Squared	  
About Us		Archived	Yes	Cascade	No	Yes	6/5/06	4:52 PM	Studio Squared	  
About Us		Archived	Yes	Inherit	No	Yes	6/5/06	3:24 PM	Studio Squared	  
About Us		Archived	Yes	Inherit	No	Yes	6/5/06	2:48 PM	Studio Squared	  

Version History for the About Us page

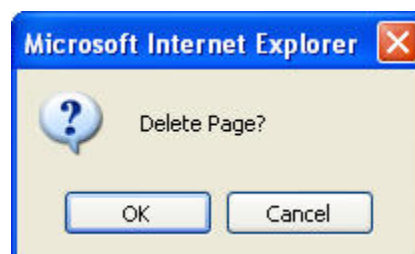
There are several functions you can perform in the version history results page.

- Click the **Edit**  button of a particular version to edit that version in the Edit Content page. Subsequently, you can save, preview or publish that version from the **Edit Content** page.
- Click the **Preview**  button to preview how the page will look in a new instance of your browser.
- Click the **Delete**  button to delete a version of the page. A dialog appears on clicking the button; clicking **OK** will remove the page.
- You can also delete the page in which case all the version history will also be removed by clicking the **Delete Page** link. A dialog appears on clicking the button; clicking **OK** will remove the page.
- You can also clear the version history by clicking the **Clear Version History** link. A dialog appears on clicking the button; clicking **OK** will remove the history.

5.2.4 Delete Page

To delete the active page


1. Click the **Delete Page** link. The delete confirmation dialog is displayed.



Delete Confirmation

- Click **OK**.

The page is deleted.

Note: You can also delete the page by clicking the **Delete**  button from the **Site Manager** page for that page or portal.

5.2.5 User Permissions

Set who and which groups can have authoring and editing capabilities of the content by setting permissions.

To set user permissions

- Click the **User Permissions** link. You can also get to this page by clicking the **Permissions**  button from the **Site Manage** page.

The web page displays the permissions for the page or portal.

Permissions

Home > About Us

To set permissions for *About Us: The Best Ever*, simply select the radio button of the User Groups you'd like to have authoring and/or editing permissions.

Editor	Author	Inherit	Read Only	Deny	Group
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Group1

[Update](#)

Permissions Page

- Select a radio button to set a type of permission for the groups listed in the table for the page.
- Click **Update** to confirm and save the selection.

Note: At content level, you can restrict access/ permissions to different groups.

At the content level, permissions cascade. That means that unless you choose to override it, a piece of content will inherit the permissions assigned to the content above it in the site tree. So for example, if at the home page you assign a specific set of permissions, all other pages will inherit those permissions.

This setup is useful for granting a set of (or individual) users access to specific areas of the site. For example, if you create a group called Marketing, and grant them access only to the "Products" section of the site, when they log into the site, they will only be able to interact with

those pages in the CMS. So members of the marketing group in a company can update the areas and records that affect their job but not others.

5.3 Creating a Page by Copying and Pasting

You can also create a page, or a group of pages or portal by copying and pasting from an existing object such as a Page or Portal.

To create a page using the copying and pasting technique

1. Mouse over the plus button of a page or portal or group of pages in the **Site Manager** whose details you wish to copy to create the new page. Select **Copy** from the shortcut menu.
2. Mouse over the plus button of a page or portal under which you would like to create the new page and select **Paste** from the shortcut menu.



The new page is created under the page or portal where you inserted the page and is titled **XXXXXX – Copy**. The **XXXXXX** is the name of the object you copied. You can now rename and edit this page to your requirements.

6. Drafts

Drafts are a collection of pages that have been edited but not published within the system. Drafts can be used for saving content changes that are in progress or are being done in collaboration between two or more content authors. The **Drafts** menu provides a list of the current drafts and allows the CMS user to view the version history for each of the content items. From this menu, CMS users can view the version history of a draft, edit a draft version of a page or publish a draft.

The **Drafts** page uses the functions of the Site Manager to accomplish most of the tasks that can be performed on saved drafts such as editing, publishing, saving, creating workflows for approvals, etc.

To view the drafts saved in the system click **Drafts** from the **Left Panel** menu. The drafts are displayed.

Drafts		
Page Title		Content Type
Home » This is a Test Page		Content Manager 
Home » Products		Content Manager 

The Drafts Page

The primary two functions of the Drafts page are described below.

6.1 Editing a Draft

Drafts are meant to be edited. Note that various types of drafts can exist, namely Content, Components and so on.

To edit a draft

1. Click the name of the page or portal. These are hyperlinked.
2. The page or portal is opened in the **Site Manager** page. Under the Site Manager page you can edit, preview, view version history and set workflows for approvals. You can also save or publish the draft. For more information on these functions refer the [Site Manager](#) and [Editing Content](#) topic.

6.2 Using the Version History

The version history of a page can be useful to determine how many times the particular page was edited. You can go back to an older version and edit it and save, preview or publish it.

To check the version history of a draft

1. Click the **Version History**  button.



The version history of the draft is displayed. For more information on how to use the version history, refer the [Version History](#) section.

7. Component Manager

Components are reusable elements that can be created and shared amongst multiple content sections within your website. Leveraging components will save you time by allowing you to create a single instance of a component and being able to assign it to multiple pages. In addition, you will be able to update and manage the display of a component used across many sections through a single interface.

Click **Components** in the **Left Panel** menu to manage components.

Component Manager

▶ Add Component

Filter View:

Title (Leave blank to view all)

Title	Display	Last Updated	
Google Buys Adobe	Yes	10/19/06	✎ 📄 🗑️
Mentor Buys Google	Yes	10/4/06	✎ 📄 🗑️
A message from our CEO	Yes	1/12/07	✎ 📄 🗑️
test	Yes	7/13/06	✎ 📄 🗑️

Component Manager

Existing components are displayed. These components can be edited, their version history checked and permissions set. They can also be deleted using the tools that we have seen earlier under [Working with Content](#). Other options and functionality will be explored here.

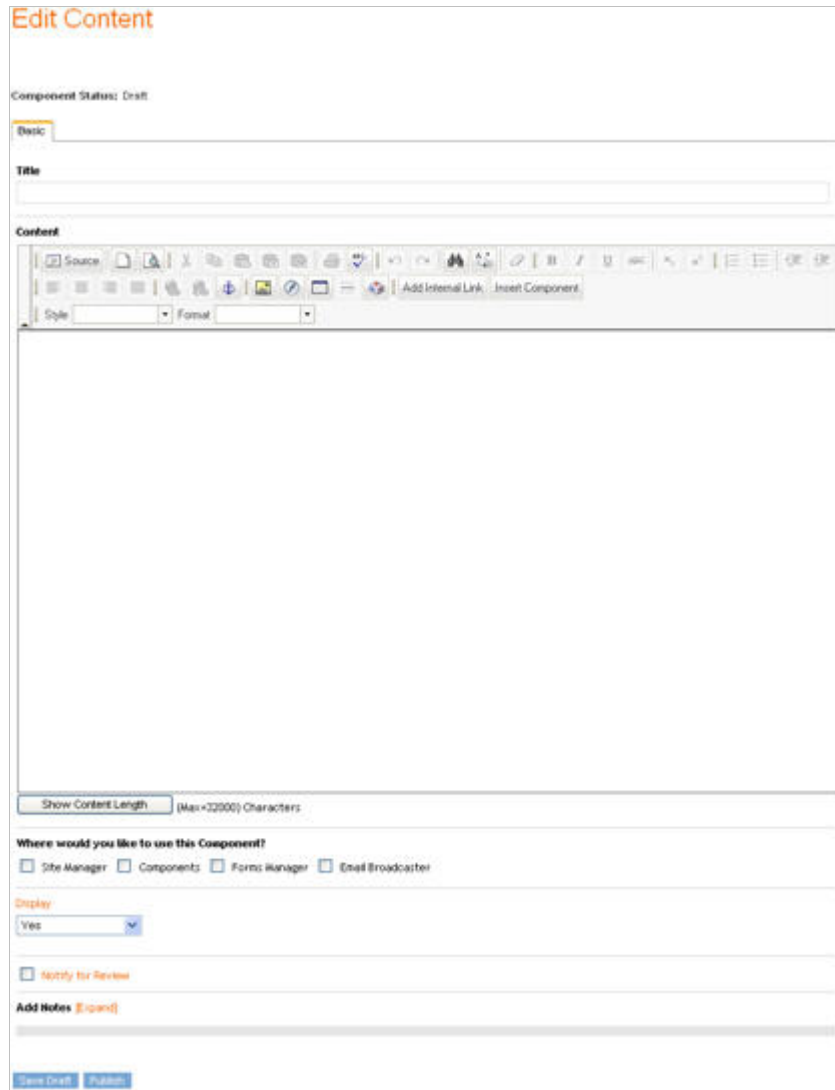
Notice that you can narrow down and locate components by typing search criteria (characters or words or phrases) into the **Title (Leave blank to view all)** field of the **Filter View** panel and by clicking **Filter**.

7.1 Creating a New Component

To create a new component

1. Click **Components** in the **Left Panel** menu to display the components in the **Details Pane**.
2. Click the **Add Component** link on the page.

The web page refreshes to display the **Edit Content** page. The Edit Content page is very similar to the [Edit Contents](#) page of the **Site Manager** but with a few small differences.



Edit Content page for Components

Unlike the **Edit Content** page of the **Site Manager** the Edit Content page of the components has only one tab, the **Basic** tab. For details on how to use this page refer to the [Working With Content](#) section of the **Site Manager**. The different features are explained below.

To specify where you would like to use the component

1. Select one or more of the Site Manager, Components, Forms Manager or the E-mail Broadcaster checkboxes under **Where would you like to use the Component?** panel.

7.2 Adding a Component to a Page


This procedure has already been covered in the [Edit Content](#) topic under the **Content.Objects** tab. In step four of the procedure, select **Components** from the **Content Objects** list. The content you have created will appear as one of the objects in a new box, which you can select the objects to the **Main** or **Sidebar** content objects boxes.

7.3 Inserting a Component to the Body of a Page

This has been described under the [Working with content](#) chapter.

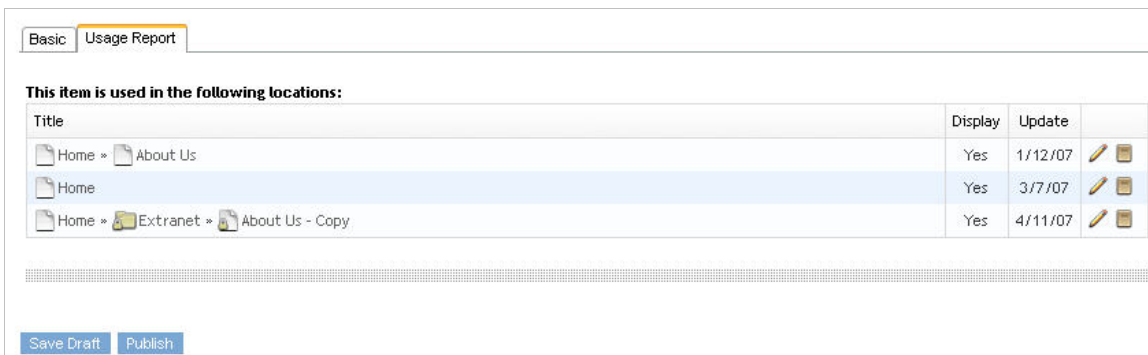
Components inserted into the body of a page are only editable from the page in which they are inserted. Edits made to the component from the components manager will only update components that are inserted into page regions through the content objects tab.







7.4 Editing a Component

You can edit a component by clicking the component as it is hyperlinked or you can click the **Edit**  button associated with the component. The component is opened in the **Edit Content** page has an additional tab, namely **Usage Report**.

To view the usage of a component

1. Click the **Usage** tab when the component is opened in the **Edit Content** page. The web page refreshes to display the usage of the component.



This item is used in the following locations:			
Title	Display	Update	
Home » About Us	Yes	1/12/07	 
Home	Yes	3/7/07	 
Home » Extranet » About Us - Copy	Yes	4/11/07	 

Usage Report for component

7.5 Setting Permissions for the Component Manager

Additionally you can also set permissions for the Component Manager.



To set permissions for the Component Manager

1. Click **Permissions** under **Components** from the **Left Panel** menu. The Permissions page for the Component Manager opens. Here you can set permissions for the various groups listed and provide them permissions. For more information refer the [User Permissions](#) section of the **Working with Content** topic.

8. Category Manager



It is here that categories for the content that has been created are managed. Typical categories include Forms, Product, News Articles, Product News, Questions and Answers etc.,

8.1 Creating a Category

To create a category




1. Select **Categories** from the **Left Panel** menu on the main **Sava** screen.

The web page refreshes to display the various existing categories in the system.

The **Edit**  and **Delete**  buttons work in a similar fashion as they did while creating content and drafts. We will explore them in the subsequent sections.

Category Manager

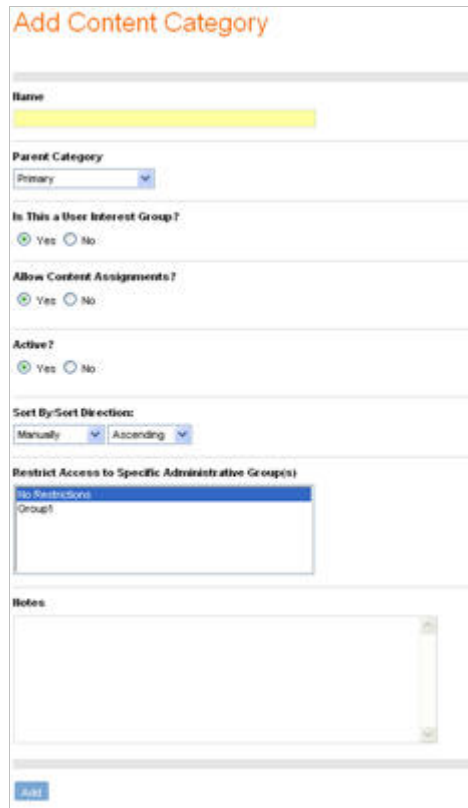
[Add New Category](#)

Category	Assignable	Interest Group	Active	
Forms	Yes	Yes	Yes	 
Forms in Benefits	Yes	Yes	Yes	 
Forms in Hiring	Yes	Yes	Yes	 
Termination	Yes	Yes	Yes	 
News Articles	Yes	Yes	Yes	 
Hiring News Articles	Yes	Yes	Yes	 
Product News	Yes	Yes	Yes	 
Products	Yes	Yes	Yes	 
Hiring Products	Yes	Yes	Yes	 
Questions & Answers	Yes	Yes	Yes	 
Hiring Questions	Yes	Yes	Yes	 

Category Manager Page

To create a category

1. Click the **Add New Category** link on the **Category Manager** page. The **Add Content Category** page is displayed.

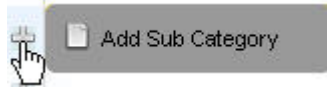


Add Category Page

2. Enter a name for the category in the **Name** field.
3. Select a category type from the **Parent Category** drop-down list. This defines if the new category being created is a Primary (one that can have subcategories below it) or if it is a subcategory below one of the existing categories.
4. Select the **Yes** radio button if this category is a **User Interest Group**.
5. Select the Yes radio button if this category allows **Content Assignments**.
6. Select the **Yes** radio button if the category is **Active**.
7. You can restrict access to this category by selecting groups from the **Restrict Access to Specific Administrative Group(s)** box.
8. Add notes related to the category in the **Notes** box.
9. Finally, click **Add**.

To create a subcategory


1. Mouse over the plus sign of a category or an element in a category. The shortcut menu is displayed.




Add Sub Category shortcut menu

2. Select **Add Sub Category** from the shortcut menu.
3. The **Add Category Manager** page will be displayed where you can create the new category. The category from where you selected the **Add Sub Category** option will be selected in the **Parent Category** drop-down list by default.

Editing a category or subcategory

Editing a category can be done by clicking the **Edit**  button of the category or subcategory from the **Category Manager** page. You can also click on the category or subcategory to edit it as it is hyperlinked. The category is opened in the **Add Content Category** page where you can perform the editing. One additional tab namely **Usage** also appears on this page. Click this tab to find out the usage statistics of the category.

Deleting a category or subcategory

To delete a category or a subcategory click the **Delete**  button of the category on the **Category Manager** page. A confirmation dialog is displayed. Click **OK** to confirm deletion.

Note: If you delete a parent of a subcategory or subcategories, the subcategory or subcategories are not deleted. Instead they become parent or primary categories.

8.2 Setting Permissions for the Category Manager

Additionally, you can also set permissions for the **Category Manager**.

To set permissions for the Category Manager

1. Click **Permissions** under **Categories** from the **Left Panel** menu. The Permissions page for the Category Manager opens. Here you can set permissions for the various groups listed and provide them permissions.

Permissions

To set permissions for *Category Manager*, simply check the box of the User Groups you'd like to have access.

Allow	Group
<input type="checkbox"/>	Group1

[Update](#)

Category Permissions Page

2. Check the **Allow** box for a group or groups to which you wish to assign access. Click **Update** when done.

9. Managing Local Content Indexes

Local content indexes are one of the most powerful features of **Sava** CMS. Local content indexes enable you to create custom lists of site content, and include them on pages as page content, navigation items, related content, etc. For example you could create a local content index of all press releases related to a certain topic, order it by date or title, and place it on any page without needing any programming or database expertise.

Local content indexes can also be used to set up and publish RSS feeds, both for external consumption or internal use on customized pages that use **Sava**'s "drag" feeds functionality.

To manage local content indexes click **Content Collections** in the **Left Panel** menu. The page refreshes to display the local content indexes and remote content feeds in the application.

Content Collections

Local Content Indexes

[Add Local Index](#)

Index	Language	Max Items	Features Only	Restricted	Active	
Products and News	en-us	20	No	No	Yes	  

Remote Content Feeds

[Add Remote Feed](#)

Feed	URL	Active
There are currently no remote feeds created.		

Content Collections page

9.1 Creating a New Local Content Index

To create a new local content index

1. Click the **Add Local Index** link on the page. The **Edit Local Index** page is displayed. The **Choose Content** tab is opened by default.

Edit Local Index

Name

Choose Content **Advanced Filters** Display RSS

Choose Content from Section: [\[Select New Section\]](#)

Section	Type
There are currently no content filters created.	

Category Filters

- adfsdfs
- Forms
 - Forms in Benefits
 - Forms in Hiring
 - Termination
- News Articles
 - Hiring News Articles
- Product News
- Products
 - Hiring Products
- Questions & Answers
 - Hiring Questions

Include Features Only?

Yes No

Add

Edit Local Index page

2. Enter a name for the local index in the **Name** field.

Note: The name is important as it determines how this specific index will be labelled within Sava CMS. Therefore, you should choose a name that's descriptive and easy to understand.

By default, your index will include content from the entire site. You can get more specific in your index by choosing to select content from specific sections of your site and/or including content that matches certain categories

3. To choose content from a section click the **Select New Section** link. Additional fields for searching for content appear.

Choose Content from Section:
Content Search

Section	Type
<i>There are currently no content filters created.</i>	

Search Content fields

4. Enter a few characters, words or phrases in the **Content Search** field and click **Search**. The search results if any are displayed as shown below.


Choose Content from Section:
Content Search

Select New Section

Home » About Us » A message from our CEO

Section	Type
<i>There are currently no content filters created.</i>	

Content Search results

5. To add this content click the **Plus**  button associated with the content. The content is included under the **Section** as shown below.


Choose Content from Section:
Content Search

Select New Section

Home » About Us » A message from our CEO

Section	Type
A message from our CEO	Page <input type="button" value="Remove"/>

New Section selected

It can be removed by clicking the **Remove**  button. You've now added a content filter to your local content index. This means that you'll be pulling content from the section(s) you selected. You can repeat this process as many times as you like to select content from multiple sections of the site.

Remember, if you choose no content filters, your **Local Content Index** will pull content from the entire site.

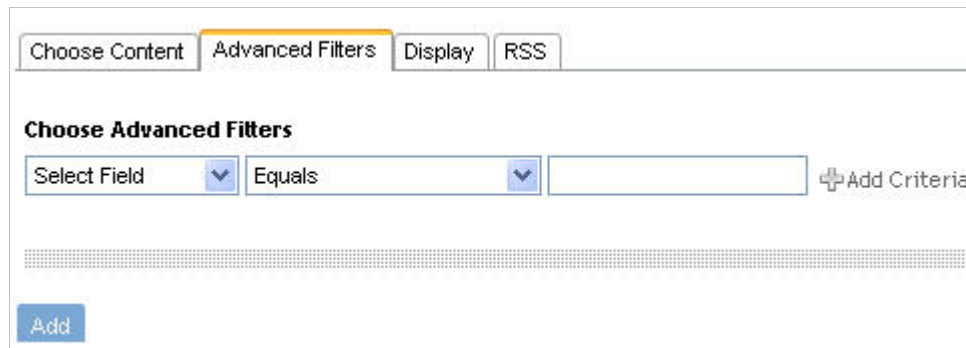
6. Under **Category Filters** select one or more checkboxes for the categories.

Note: You can refine your index by choosing which categories you want to be included in your index (if you choose no categories, you'll get content from all categories). For example, if you select "products" from your list of available categories, your index will only include content that matches the "products" category. You can select as many categories as you need here

7. Select a radio button under **Include Features only?**

Note: Featured items are ones that have been flagged as “is Featured” at the content item level. By default, the content index includes all content items that match the site section and category criteria you’ve chosen. Therefore, you can choose to further filter your index by including only featured content

- Click the **Advanced Filters** tab. The fields of the **Advanced Filters** tab are displayed. Here you can add complex filter criteria.



Advanced Filter tab fields

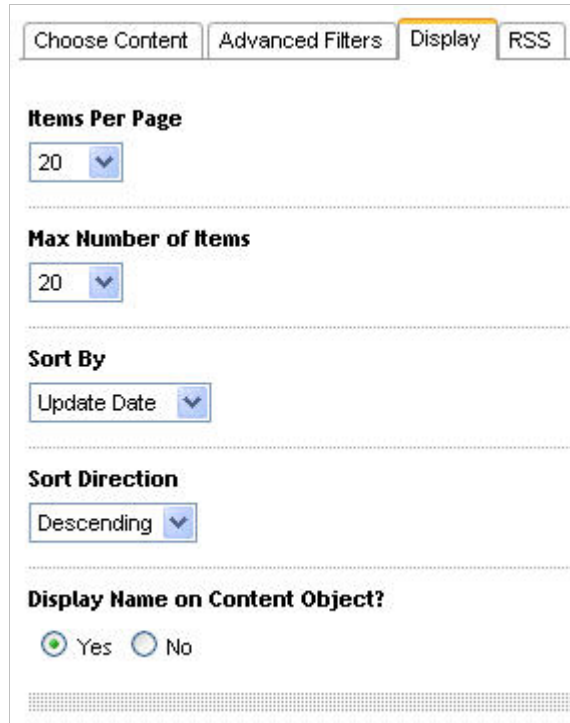
- First select a field from the **Select Field** drop-down list.
- Select a condition from the second drop-down list.
- Finally, enter a value in the empty field. An example of a condition would be “Meta Keywords Equals CEO.”
- Click **Add Criteria** to add the criteria. The criterion is added as shown below.



Criteria Added

To remove criteria click **Remove Criteria**.

- To add more criteria create another criteria from the additional fields displayed and click **Add Criteria**.
- Repeat the process to add more criteria.
- Click the **Display** tab. The fields of the **Display** tab are displayed. Here you have the ability to set several criteria that affect the output and display of your local content index.

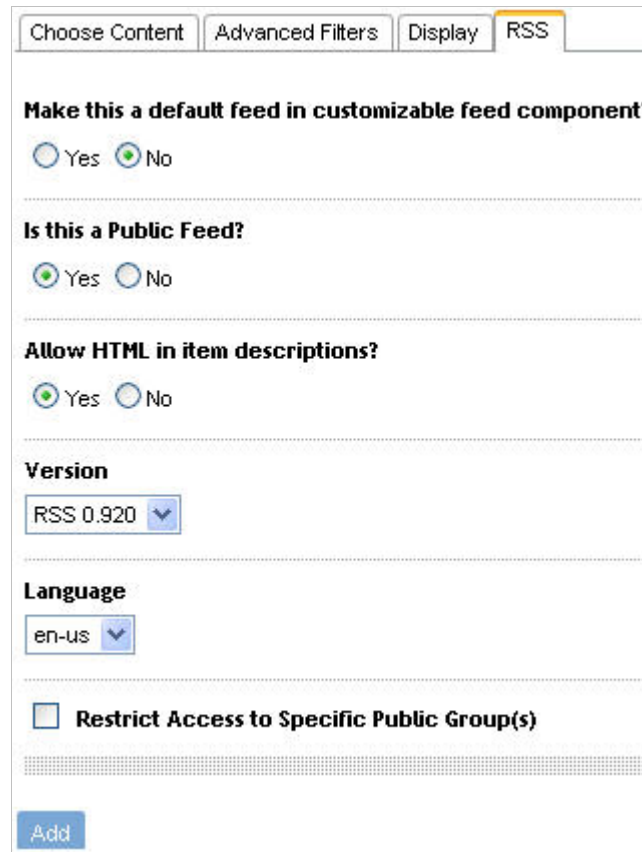


The screenshot shows a web interface with four tabs: 'Choose Content', 'Advanced Filters', 'Display' (which is selected and highlighted in orange), and 'RSS'. Below the tabs are several configuration sections:

- Items Per Page:** A dropdown menu currently set to '20'.
- Max Number of Items:** A dropdown menu currently set to '20'.
- Sort By:** A dropdown menu currently set to 'Update Date'.
- Sort Direction:** A dropdown menu currently set to 'Descending'.
- Display Name on Content Object?:** Two radio buttons, 'Yes' (which is selected) and 'No'.

Fields of the Display tab

16. Select a value from the **Items Per Page** drop-down list to set the number of items per page or the number of items in a list.
17. Select a value from the **Maximum Number of Items** drop-down list to set the total number of items in your list.
18. Select an option from the **Sort By** drop-down list to choose the criteria to sort the list. The different options are:
 - Update Date** – the date the content item was last updated;
 - Release Date** – the date manually assigned to the content item;
 - Menu Title** – the title field used for navigation purposes for the content item; and
 - Long Title** – the full title of the content item.
20. Select a sort direction for your list from the **Sort Direction** drop-down list.
21. Select the appropriate radio button to display or hide name on the content object under **Display Name on Content Object**.
22. Click the **RSS** tab. The fields of the **RSS** tab are displayed.



RSS tab fields

In addition to creating and managing content within your site, local content indexes are a great tool for creating RSS feeds for external publishing.

Once you've created or begun to edit a local content index, using the RSS tab you now have the ability to refine the RSS feed to meet your specific needs.


22. Select the **Yes** radio button under **Make this a default feed in customizable feed content?** to make this local content index one of the default feeds presented in a customizable feed. You would use this if you set up personalized pages with draggable feeds.
23. Select the **Yes** radio button under **Is this a Public feed?** if you want your RSS feed to be available for public consumption through RSS readers, etc.


Note: There are occasions where you could use your RSS field for internal consumption in other areas of the site, and not to publish for public consumption.

24. Select the **Yes** radio button under **Allow HTML under item Descriptions?** to allow HTML in the RSS field. If you choose **No**, your RSS will be published as plain text.
25. Select an option from the **Version** drop-down list for choice of RSS version.
26. Select a language from the **Languages** drop-down list. By default, **Sava** publishes RSS in English. Other language options are available, but these need to be added by your development team

27. Check the **Restrict Access to Specific Public Group(s)** checkbox if you want to publish an RSS feed, but make it available to only site members. A box appears displaying the various groups. Select one or more groups you wish to restrict access.
22. Finally click **Add** to create the local content index.

9.2 Editing and Refining a Local Content Index

Navigate to the local content index section of **Sava** and select the index you wish to update by clicking on its title that is hyperlinked. You can also edit a local content index by clicking its **Edit**  button from the **Content Collections** page. The **Edit Local Index** page opens displaying the local content index. You can now adjust all aspects of the local content index. Once you save your changes, the public output will reflect the refinements you've made. One additional tab, **Usage**, is displayed. Click this tab to find out the usage of the local content index.

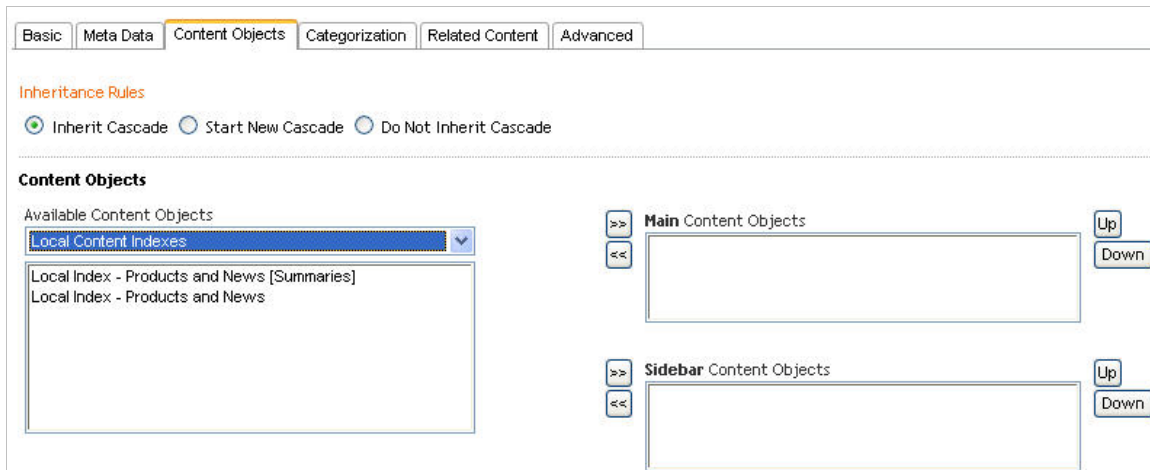
To delete a local content index click the **Delete**  button associated with the index on the **Content Collections** page. A confirmation dialog opens. Click **OK** to confirm deletion.

9.3 Inserting a Local Content Index on a Page


Use the **Site Manager** to navigate to the page on which you want the local content index to appear. Select the page for editing by clicking on the page title. Once you have opened the page for editing, click on the **Components** tab on the page.

Use the pull-down menu in the **Components** tab to select **Local Content Indexes**.


You'll be presented with a list of local content indexes from which to choose.



Local content index selection

Click on the **Local Content Index** you want, and then click the “double arrow”  button to place it in the appropriate page region.

9.4 Viewing a Local Content Index in RSS

This can be done from the **Content Collections** page. To view a local content index click the **View RSS**  button associated with its record. A new window of your browser is opened where the content is displayed.

9.5 Setting Permissions for the Content Collections

To set permissions for the Content Collections Manager

1. Click **Permissions** under **Content Collections** from the **Left Panel** menu. The **Permissions** page for the **Content Collections Manager** opens. Here you can set permissions for the various groups listed and provide them permissions.

Permissions

To set permissions for *Category Manager*, simply check the box of the User Groups you'd like to have access.

Allow	Group
<input type="checkbox"/>	Group1

[Update](#)

Category Permissions page

2. Check the **Allow** box for a group or groups for which you wish to assign access and click **Update** when done.

10. Remote Content Feeds

Sava enables external RSS/ATOM feeds (which we call remote content feeds), and makes them available within the CMS for placement on any page. This is useful for creating “portal” type pages, as well as creating customizable, personalized pages where the user can choose from a set of default feeds (as provided by the site administrators).

The remote content feeds are created from the **Content Collections** page.

To view the **Content Collections** page click **Content Collections** from the **Left Panel** menu. The page is displayed listing all the local content indexes and the remote content feeds.

Content Collections

Local Content Indexes

[▶ Add Local Index](#)

Index	Language	Max Items	Features Only	Restricted	Active	
Products and News	en-us	20	No	No	Yes	  

Remote Content Feeds

[▶ Add Remote Feed](#)

Feed	URL	Active
There are currently no remote feeds created.		

Content Collections page

10.1 Creating a Remote Content Feed

To create a remote content feed

1. Click the **Add Remote Feed** link from the **Content Collections** page under the **Remote Content Feeds** section. The **Edit Remote Feed** page opens. The **Basic** tab opens by default.

Edit Remote Feed

Name

URL

Basic Categorization

Max Number of Items

Version

Is this feed active?

Yes No

Is this a public feed?

Yes No

Make this a default feed in customizable feed component?

Yes No

Add

Edit Remote Feed page

2. Enter a name for the feed in the **Name** field.

Note: The name of the feed is important as it determines how this specific index will be labelled within Sava. Therefore, you should choose a name that's descriptive and easy to understand.

3. Enter the URL of the feed in the **URL** field.
4. Select a value for number of items from the **Max Number of Items** drop-down list.
5. Select a version for the RSS from the **Version** drop-down list.
6. Select the **Yes** radio button under **Is this feed active?** to add it to the list of active feeds in **Sava**. It now will be available for placement on a page as a content object. If you select **No**, the feed will remain in the **Remote Content Feeds** manager but

will not be available in other areas of the CMS, and will not be able to be placed on a page, included in content collections, etc.

7. Select the **Yes** radio button under **Is this a public feed?** to make your RSS feed available to the public.
8. Select the **Yes** radio button under **Make this a default feed in customizable feed component?** to make this remote content feed one of the default feeds presented in **Sava** for users setting up personalized pages. You would only use this if you set up pages that users can customize and personalize with feeds that can be dragged.
9. Click the **Categorization** tab. The fields of the tab are displayed.



Basic Categorization

Category Assignments

Forms

Forms in Benefits

Forms in Hiring

Termination

News Articles

Hiring News Articles

Product News

Products

Hiring Products

Questions & Answers

Hiring Questions

Categorization fields

10. Select one or more categories by checking the associated check boxes.
11. Finally, click **Add**.

10.1.1 Editing a Remote Control Feed




This procedure can be done from the from the **Content Collections** page.


Remote Content Feeds

[Add Remote Feed](#)

Feed	URL	Active	
BBC News	http://newsrss.bbc.co.uk/rss/newsonline_world_edition/front_page/rss.x	Yes	  

Remote Content Feeds section on the Content Collections page

Click the **Edit**  button to open the remote content feed in the **Edit Remote Feed** page. The additional tab, **Usage** reports the usage of the feed. Once you complete editing click the **Update** page. The **View Feed**  button lets you view the page in a new browser window. To delete a feed click the **Delete**  button. When the confirmation dialog is displayed click **OK**.

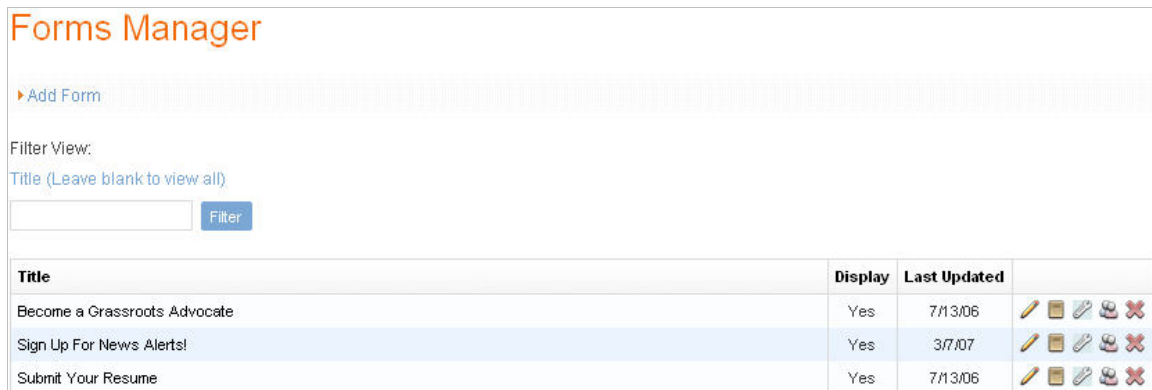
You can also import a feed. To do this, click the **Import**  button.













11. Data Collection

Data Collection Manager allows you to create HTML forms to be embedded in content pages within the site. Data collection forms capture customer submitted data and send e-mail notifications to the site administrator or additional recipients. In addition to these activities, all of the data submitted through data collection form is stored and displayed within the data collection administrative interface

11.1 The Forms Manager

Click **Forms** from the **Left Panel** menu to view the forms in the system.



Title	Display	Last Updated	
Become a Grassroots Advocate	Yes	7/13/06	   
Sign Up For News Alerts!	Yes	3/7/07	   
Submit Your Resume	Yes	7/13/06	   

Forms Manager page

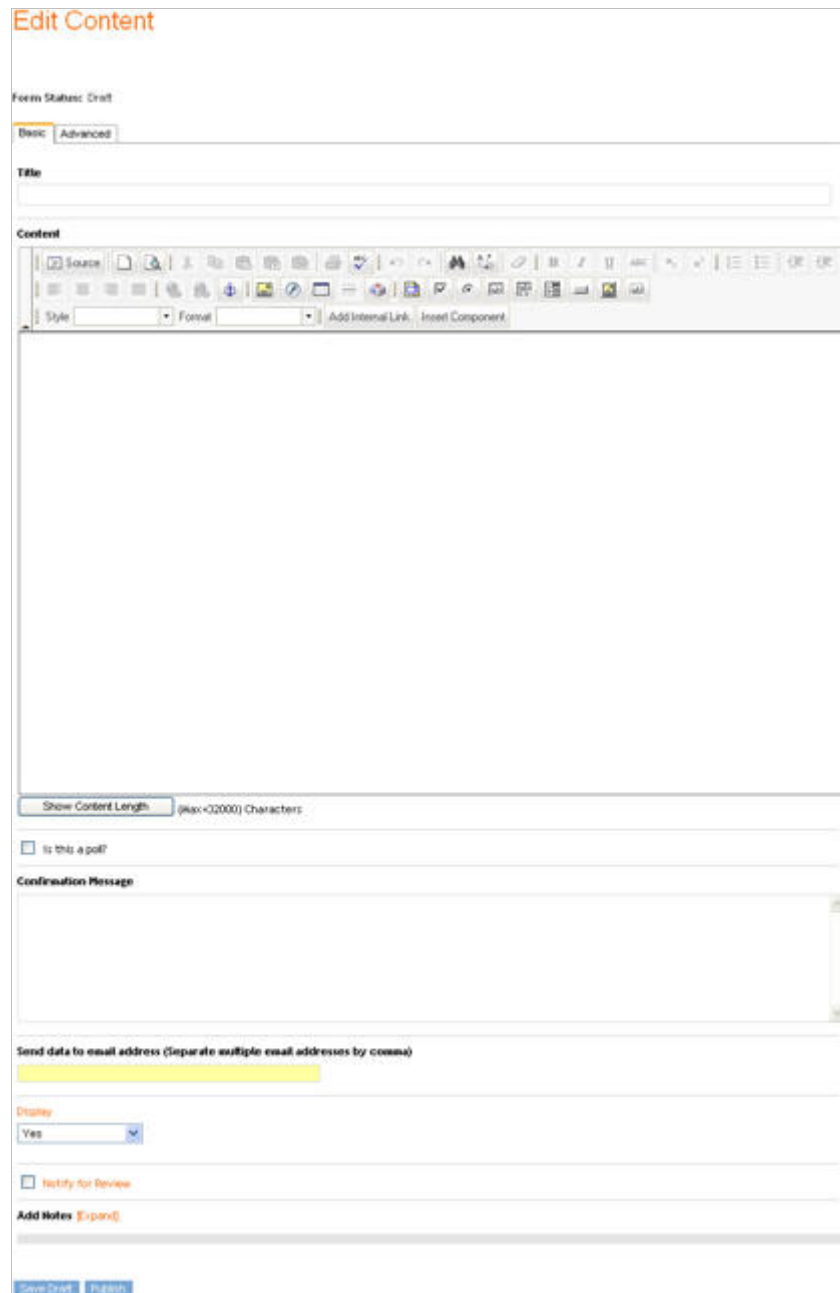
By default, the page displays all the forms of the system. To search and locate a particular form, enter characters, words or a phrase from the name of the form into the **Title (Leave blank to view all)** field and click the **Filter** button. If **Sava** finds the forms that match the input of the **Title** field, they are displayed.

You will learn the rest of the functions in the sections below by learning how to create a sample form.


11.2 Creating a Data Collection Form

To create a data collection form

1. Click the **Add Form** link on the **Form Manager** page. The web page refreshes to display the **Edit Content** page. The **Basic tab** is opened by default.








Edit Content page for form creation

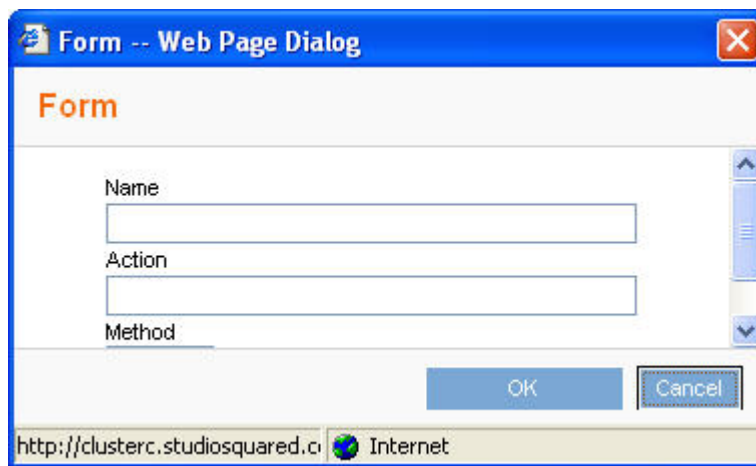
2. Enter a name for the form in the **Title** field. In our example let us create a **Customer Satisfaction Survey** form.
3. To create a form first click the **Form**  button located in the toolbar of the **Contents** box.

Note: Most of the buttons of the toolbar are similar to word processing software such as Word. We have already discussed the toolbar under **Working with Content**. The rest of the buttons are explained in subsequent steps or are similar in function to the other controls that are explained.

Other buttons for control objects are:

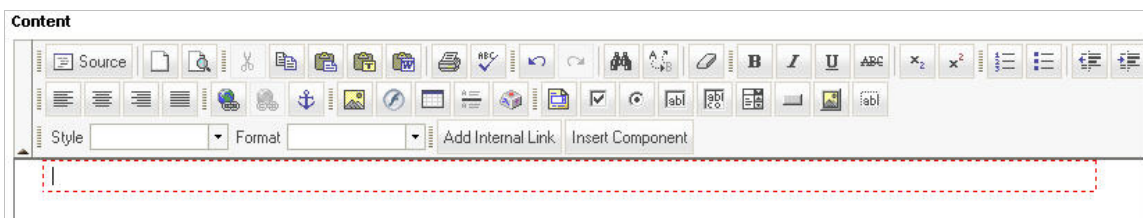
-  Checkbox button
-  Radio button
-  Text Area button for entering notes
-  Image button for inserting images, and
-  Hidden field button

4. The **Form** web dialog opens.




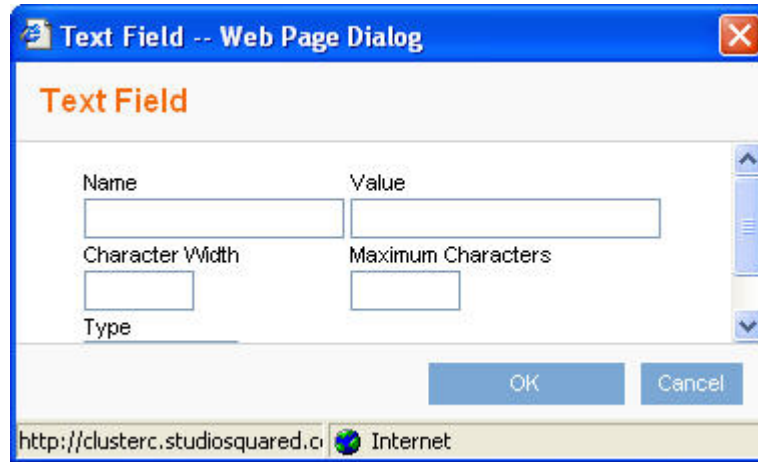
Form Web Page Dialog

5. Enter a name in the **Name** field. Since we are creating a survey, name it “Survey Form”.
6. Leave the **Action** and **Method** fields as they are.
7. Click **OK**. The form element is included inside the content box as shown below.



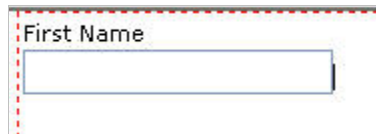
Form element in Content box

8. You can expand this form element by pressing the enter button on your keyboard or by entering content inside the form. You can also enter other controls inside the form element.
9. Type the words “First Name” at the top of the box and press **Enter** to position the cursor on the next line.
10. Click the **Text Field**  button on the toolbar. The Text Field web dialog opens.




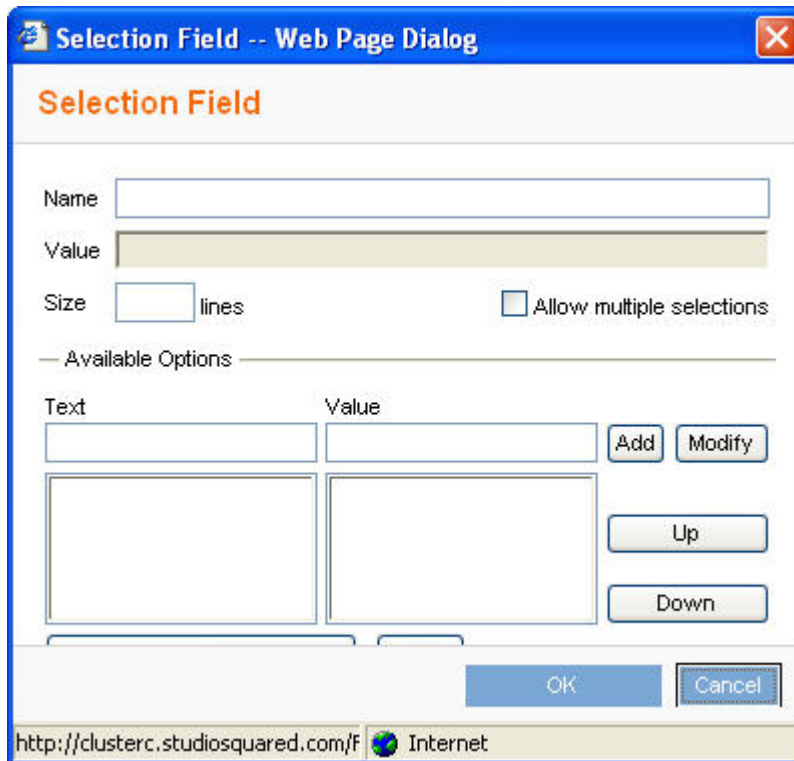
Text Field Web Dialog

11. Fill in the fields of the dialog as appropriate. Note that in the **Type** drop-down list you must not select **Password** as this will mask the characters that are being input into the fields.
12. Click **OK**. The text field is inserted into the form as shown below.



Text field inserted

13. In a similar manner, add text and text fields for **Last Name** and **E-mail Address**. The form must look as follows.
14. Add text "Tell us what you think of this site".
15. To add a drop-down list for response to this prompt click the **Selection Field**  button. The **Selection Field** web page dialog opens.



Selection Field Web Page Dialog

16. Enter a name in the **Name** field.
17. If you check the **Allow multiple selections** checkbox your reader will be able to select more than one option from the drop-down list.
18. For the items in the drop-down list add them one by one in the **Text** field and click **Add**. The options will appear in the box below. You may also add a value for each option in the **Value** field. You can choose to order them later by selecting them and using the **Up** and **Down** buttons.
19. Click **OK**. The drop-down list is inserted as shown below. You can double-click the drop-down list to verify its order or options.




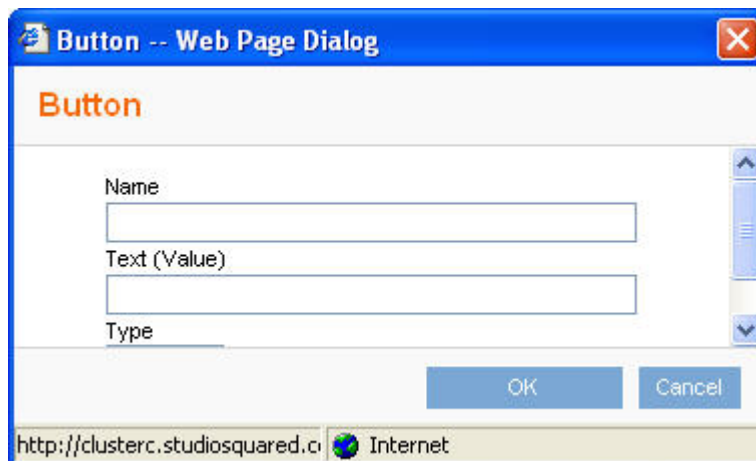
Drop-down control inserted

20. Similarly, add another drop-down control for “How did you hear about us?”



Second drop-down added

21. Finally, to add a “Submit” button, click the **Button control**  button on the toolbar. The **Button** web dialog opens.



Button Web Page Dialog

22. Enter a name for the control in the **Name** field and enter the text that you wish to appear on top of the button in the **Text** field. Select a **Button** from the **Type** drop-down list.
23. Click **OK**. The control is added as shown below.

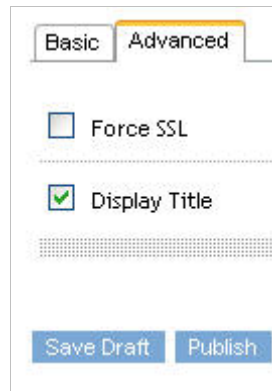


The screenshot shows a form with the following elements:

- Text label: "First Name" above a yellow input field.
- Text label: "Last Name" above a yellow input field.
- Text label: "Email Address" above a yellow input field.
- Text label: "Tell Us What you think of this site" above a dropdown menu.
- Dropdown menu: Shows "Boring" with a downward arrow.
- Text label: "How did you hear about us?" above a dropdown menu.
- Dropdown menu: Shows "T.V" with a downward arrow.
- Button: "Submit" with a vertical bar on the right side.

Form fully created

24. Check the **Is this a Poll?** checkbox if your form is to be used for a poll. For Polls, most of the questions on the form must have a **Yes/No** radio selection button.
25. Enter a message in the **Confirmation Message** box that will be displayed to users after they click the **Submit** button.
26. Add e-mail address(es) in the **Send data to email address** field if you wish the data being submitted through the form to reach other recipients.
27. Under **Display** choose "Yes" if you want the component to be accessible to the public. Choose "Per Start/Stop Dates" to schedule when your content is to appear and be removed from the site. In this case additional fields will appear allowing you to choose dates. Choose "No" if you do not want visitors to view it. If you choose "No" the data collector will only be viewable through the **Sava** interface.
28. Check the **Notify for review** checkbox if you wish to notify other users about the component. Additional boxes appear, allowing you to select users and fine-tune your message.
29. To add notes about this form, click the **Expand** link next to **Add Notes** and add notes in the box that appears.
30. Click the **Advanced** tab. The fields of the tab are displayed.



Advanced tab fields

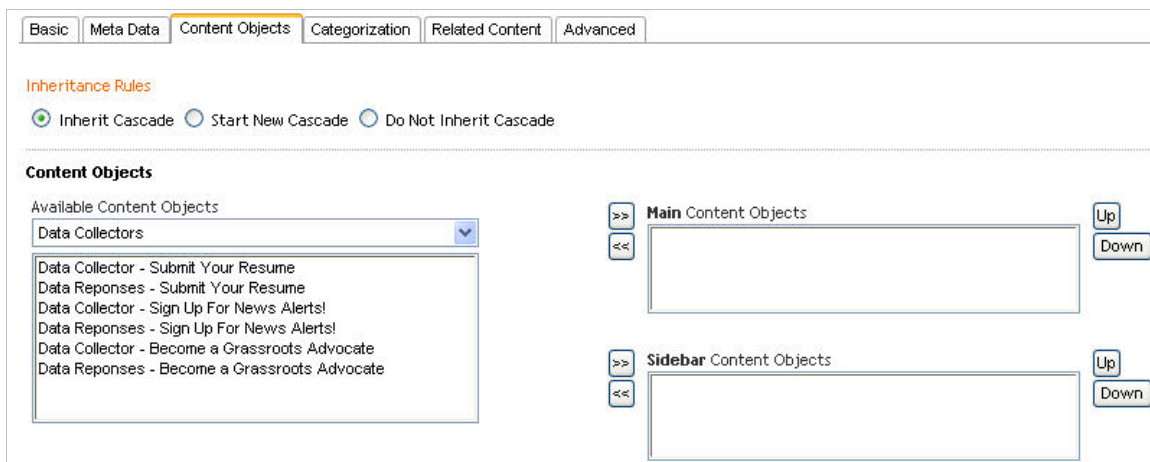
31. To select an option, check the appropriate checkbox.
33. Finally, to publish this form click **Publish** or click **Save Draft** to revisit or edit and publish later.

11.3 Inserting a Data Collection Form on a Page

This topic explains how you can add a data collection form on a content page.

To add a data collection form on a page




1. Use the **Site Manager** from the **Left Panel** menu and navigate to the **Content Objects** tab of the page.
2. Select **Data Collectors** from the **Available Content Objects** drop-down list, and a list of all the forms in the system are displayed in the box as shown below.





Inserting Forms using the Site Manager

3. From here you can select one or more data collection or other forms and include them in the **Main** or **Sidebar** areas of your page. For more information see [Content Objects](#) under the **Working with Content** chapter.

11.4 Editing and Deleting a Form

You can edit forms that have been saved as drafts. To edit a draft or a form in the system, click the form from the **Forms Manager** page or click the **Edit**  button associated with the form. The form opens in the **Edit Content** page with one additional field, **Usage**, which displays the form's purpose. Other buttons on the **Forms Manager** page such as the **Version History**  button and the **Permissions**  button can be used to check version history and setting permissions for groups. These functions can be accessed via the **Edit Content** page too. For more information see the [Working with content](#) chapter.


Use the **Delete**  button associated with a form to delete it. A confirmation dialog opens and clicking **OK** deletes the form.

Manage Data  button and the **Manage Data** link on the **Edit Content** page have the same function. These are discussed in the next section.

11.5 Viewing and Downloading Data

Each story that is submitted by a public user is captured and stored within the database, as well as e-mailed to the addresses specified in the CMS.

To view and download the data for a specific site


1. Click the **Manage Data**  button of the form on the **Forms Manager** page or click the **Manage Data** link of the form from the **Edit Content** page. The **Manage Data** page for the form opens.

Manage Data


[▶ Version History](#)
[▶ Edit Display](#)
[▶ Delete Form](#)
[▶ Permissions](#)

Title: Sign Up For News Alerts!
 Total Records Available: 2

From

03/07/2007  11 AM 01

To

03/07/2007  11 AM 41




Sort By



EMAIL Ascending

Keyword Search

EMAIL

Manage Data page

2. Select a from date and time using the **Calendar**  button and drop-down lists under **From**.
3. Perform the same operation for the **To** field.
4. Select a field and sorting order under **Sort By** to sort the data.
5. Finally, select a field from the drop-down list under **Keyword Search** and enter keywords into the empty field.
6. Click either the **View Data** or **Download** button. If you select **View Data** the data is displayed in the browser. You can edit the displayed output by using the **Edit**  button or delete it using the **Delete**  button.

	Date/Time Entered	EMAIL
	2007-03-07 11:01:00.0	test@test.com
	2007-03-07 11:41:00.0	test@test.com

If you selected **Download**, the windows File Download dialog is displayed where you can save or open the file.

11.6 Setting Permissions

You can also set permissions for the **Forms Manager**.

To set permissions for the Forms Manager

1. Click **Permissions** under **Forms Manager** from the **Left Panel** menu. The **Permissions** page for the Forms Manager opens. Here you can set permissions for the various groups listed and provide them permissions. For more information refer the [User Permissions](#) section of the **Working with content** topic.

12. Managing Site Members and Memberships

Under this chapter you will learn how to create users and groups who can use **Sava**. A group comprises of one or more users. Users and groups are the primary people who will use your **Sava** system. In the process of creating groups and users, first create the group and then users so that you can assign the user to a group while creating the user. Note that you need to have the necessary rights to create these.

To view the current groups and users of the system click **Site Members** in the left panel menu. The **Site Members & Groups** page is displayed.

Site Members & Groups

[Add Member](#) [Add Group](#)

Search for Members

User Groups

Name (<i>Members</i>)	Email	Update	Author/Editor	
Marketing (1)	Marketing@email.com	4/16/07 10:29 AM	Elance Writer	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Site Members & Groups page

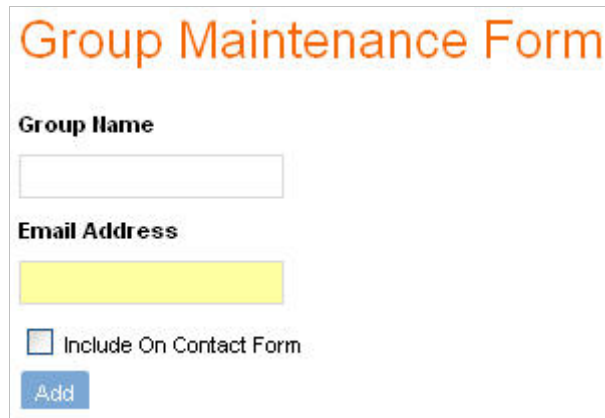
Note the number in parentheses beside the group name **Marketing**. This number indicates the number of members of the group. You can search for members using the search functionality, which you will learn in a subsequent section. You can also edit a group or delete it using the **Edit** and **Delete** buttons for the group on this page. Clicking the **Delete** button displays the confirmation dialog and clicking **OK** deletes the group. Clicking **Edit** opens the group in the **Group Maintenance Form** page. From this page you can view the members of the group. Clicking the **Edit** button of user's record you can edit the user information, too, via the **Member Maintenance Form** page.

12.1 Creating Groups

It is best to create a group *before* creating the user for that group since it is during the creation of the user that the user is assigned to an existing group.

To create a group

1. Click the **Add Group** link on the **Site Members & Groups** page. The **Group Maintenance Form** page is displayed.



Group Maintenance Form page

2. Enter a name for the group in the **Group Name** field.
3. Enter an e-mail address for the group in the **Email Address** field.
4. Check the **Include On Contact Form** checkbox if you wish the group to be included on the contact form.
5. Click **Add**.

12.2 Creating Members

To create a member

1. Click the **Add Member** link on the **Site Members & Groups** page. The **Member Maintenance Form** page is displayed. By default the Basic tab is opened.

Member Maintenance Form

*Required, **Required to login to Site

Basic | Address Information | Group Memberships | Interests | Advanced

First Name*

Last Name*

Organization

Job Title

Mobile Phone

Email Address*

Username**

New Password**

New Password Confirm**


Add

Creating a member

Note: All fields marked with a double asterisk (**) are mandatory and must be filled.

3. Enter the first name of the user in the **First Name** field.
4. Enter the last name of the user in the **Last Name** field.

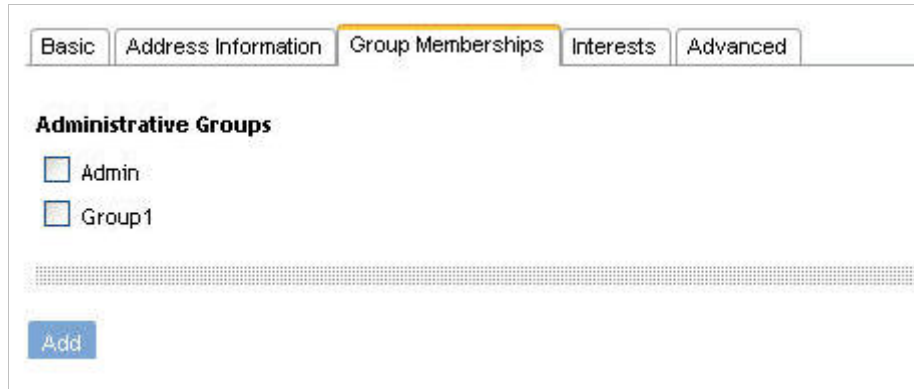
5. Fill the remaining fields as appropriate. For the **Username** and **Password** fields make a note of the username and password while creating the same.
6. Click the **Address Information** tab. The fields of the tab are displayed.



The screenshot shows a web form with five tabs: 'Basic', 'Address Information', 'Group Memberships', 'Interests', and 'Advanced'. The 'Address Information' tab is selected and highlighted with an orange border. Below the tabs, there are eight input fields, each with a label above it: 'Street Address 1', 'Street Address 2', 'City', 'State', 'Zip', 'Country', 'Phone', and 'Fax'. All these input fields are currently empty and have a yellow highlight. At the bottom left of the form area, there is a blue button labeled 'Add'.

Address Information addition page

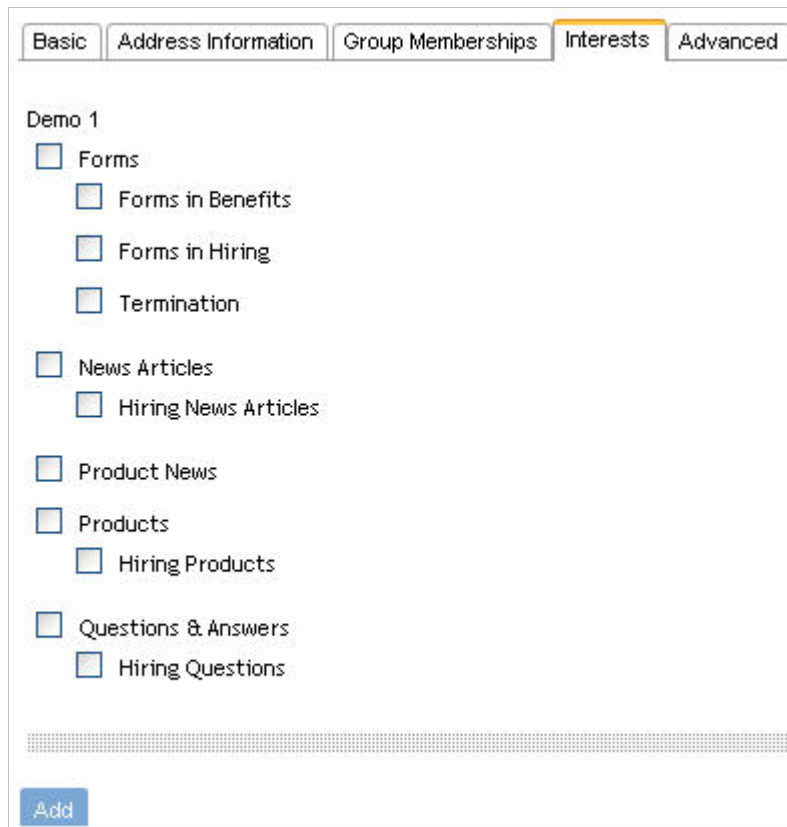
7. Enter details of the user's address in the fields of this page.
8. Click the **Group Memberships** tab. The fields of **Group Memberships** tab are displayed.



The screenshot shows a web interface with five tabs: Basic, Address Information, Group Memberships (selected), Interests, and Advanced. Under the Group Memberships tab, there is a section titled "Administrative Groups" containing two checkboxes: "Admin" and "Group1". Below this section is a dotted horizontal line and a blue "Add" button.

Group Membership fields

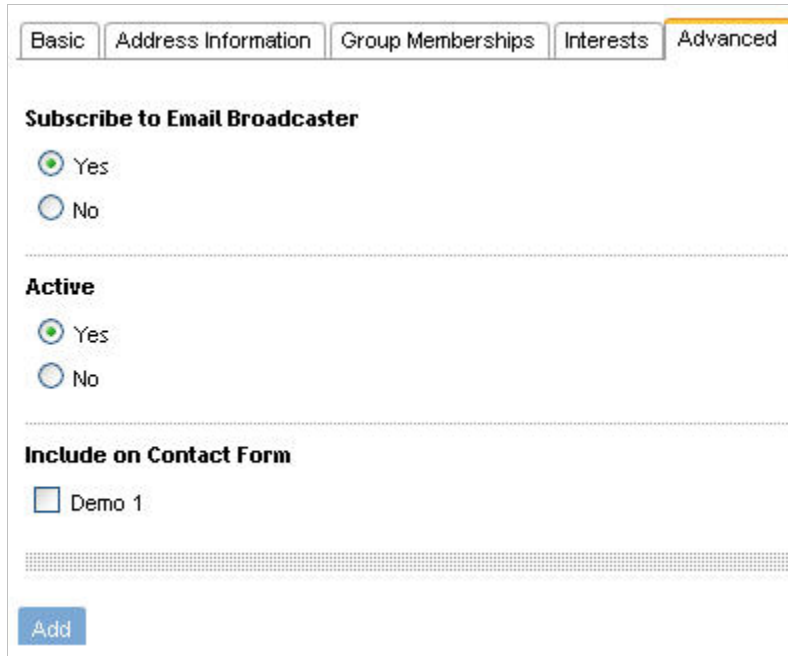
9. Select the group or groups to which you wish to add the user by checking the checkbox associated with the group.
10. Click the **Interests** tab. The fields of the tab are displayed.



The screenshot shows the same web interface with the "Interests" tab selected. Under this tab, there is a section titled "Demo 1" containing several checkboxes: "Forms" (with sub-items "Forms in Benefits" and "Forms in Hiring"), "Termination", "News Articles" (with sub-item "Hiring News Articles"), "Product News", "Products" (with sub-item "Hiring Products"), and "Questions & Answers" (with sub-item "Hiring Questions"). Below this section is a dotted horizontal line and a blue "Add" button.

Interests tab details

11. Check the boxes as appropriate.
12. Click the **Advanced** tab. The fields of the tab are displayed.



Advanced Tab fields

13. Select the radio buttons and checkbox as appropriate.
14. Click **Add**.

12.3 Searching Members

You can search for members from the **Site Members & Groups** page.

To search for members

1. Enter characters of a member's name in the **Search for Members** field and click **Search** or press the **Enter** key on the keyboard. If any member is found, the details of the member are displayed in the **Member Maintenance Form** page.
2. Edit the employee details on the **Basic** and other tabs as required. When you are done, click **Update**.

12.4 Setting Permissions and Access Rights

You can also set permissions for the **Public User Manager**.

To set permissions

1. Click **Permissions** under **Site Members** on the **Left Panel** menu. The **Permissions** page is displayed.

Permissions

To set permissions for *Public User Manager*, simply check the box of the User Groups you'd like to have access.

Allow	Group
<input type="checkbox"/>	Group1

[Update](#)

Setting Permissions for groups

2. Check the **Allow** box for a group or groups for which you like to have access.
3. Click **Update**.

13. Advertising Management

The Advertisement Manager is a powerful tool that allows you to dynamically place and track the performance of advertisements on your website without the use of third party management products. In order to take advantage of the Advertising Manager, your site will need to be configured to display advertisements.

Click **Advertising** in the **Left Panel** menu, and the **View Advertisers** page is displayed in the **Details Pane**. You can search for advertisers by entering details in the **Advertiser Search** field and clicking **Search**.



View Advertisers

Advertiser Search

Advertiser	Contact	Email
There are currently no available advertisers.		

View Advertisers page

13.1 Understanding the Components of Advertising Management

The Advertisement Manager is comprised of four different components. These components are **Ad Zones**, **Advertisers**, **Creative Elements**, and **Campaigns**.

- **Ad Zones** are predefined areas of your website where advertisements can appear.
- **Advertisers** are the clients who are advertising on your website.
- **Creative Elements** are the visual assets used in the advertisements, either images or flash movies.
- **Campaigns** are the advertising campaigns that your advertisers will run on your site. One client may have several campaigns running at the same time.

13.2 Understanding Ad Zones

Ad zones are predefined areas of a website where advertisements can be displayed. Ad zones are typically in two or three areas on a site, such as the top banner, right margin and body content area.

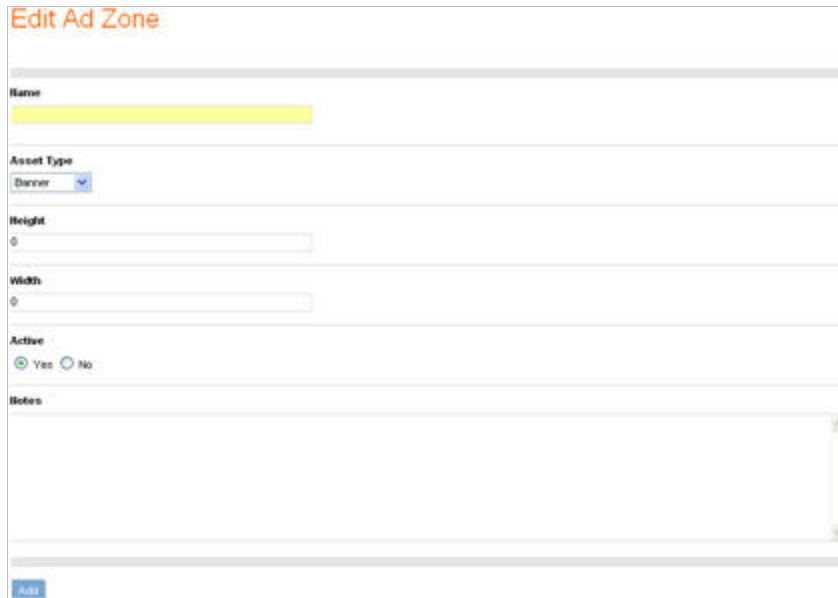
To manage ad zones, click **Ad Zones** under **Advertising** on the **Left Panel** menu.

The **View Ad Zones** page opens displaying ad zones of the system. You can search for these zones by entering characters, words or phrase of the campaign into the **Ad Zone Search** field and clicking **Search**.

To create an ad zone



1. On the **View Ad Zones** page click the **Add Zone** link.

- The page refreshes to display the **Edit Ad Zone** page.



Edit Ad Zone page

- Enter a name for the ad zone in the **Name** field.
- Select an asset type from the **Asset Type** drop-down list. This determines the type of ad zone you are creating (i.e., banner, content ad and skyscraper).
- Enter a value in pixels for the height and width of the ad zone in the Height and Width fields respectively.
- Select the **Yes** radio button to make the ad zone active, otherwise to make it inactive select the **No** radio button.
- Enter any notes related to the ad zone under **Notes**.
- Click **Add**.

Note: Once an ad is created it can also be edited from the View Ad Zones page by clicking the Edit  button. The ad zone is then opened in the Edit Ad Zone page with the additional Usage tab that displays the usage report of the ad zone. Deletion is also possible from this page or from the View Ad Zones page by clicking the Delete  button.

13.3 Adding Advertisers

You can create advertisers using the **Site Members** option of the **Left Panel** menu.

To create an advertiser

- Create a group named **Advertisers** under **Site Members**.
- Create users (advertisers) and add them to the Advertisers group.

For more information on how to do this see the [Managing Site Members and Memberships](#) chapter.


To view the existing advertisers click **Advertisers** under **Advertising** of the **Left Panel** menu. The page displays the advertisers under the **View Advertisers** page.

View Advertisers

Advertiser Search

Advertiser	Contact	Email	
One Ad Company	Kevin Coda	kevincoda@email.com	

View Advertisers page

To edit details of an advertiser, click the advertisers link on this page or click the associated **Edit**  button. The **Advertiser Summary** page for the advertiser opens.

Advertiser Summary

One Ad Company
Kevin Coda

Ad Campaigns

[Add New Campaign](#)

Campaign Name	Start Date	End Date	Active
This advertiser has no campaigns.			

Creative Assets

[Add Creative](#)

Asset Name	Asset Type	Media Type	Height	Width	Date Created	Date Updated	Active
This advertiser has no creatives.							

Advertiser Summary page

13.4 Creating a Campaign

To create a campaign

1. Click the **Add New Campaign** link on the **Advertiser Summary** page for the advertiser. The Edit Campaign page for the advertiser is displayed.

Edit One Ad Company Advertising Campaign

[Back to Advertiser](#)

Campaign Information

Name

Start Date

End Date

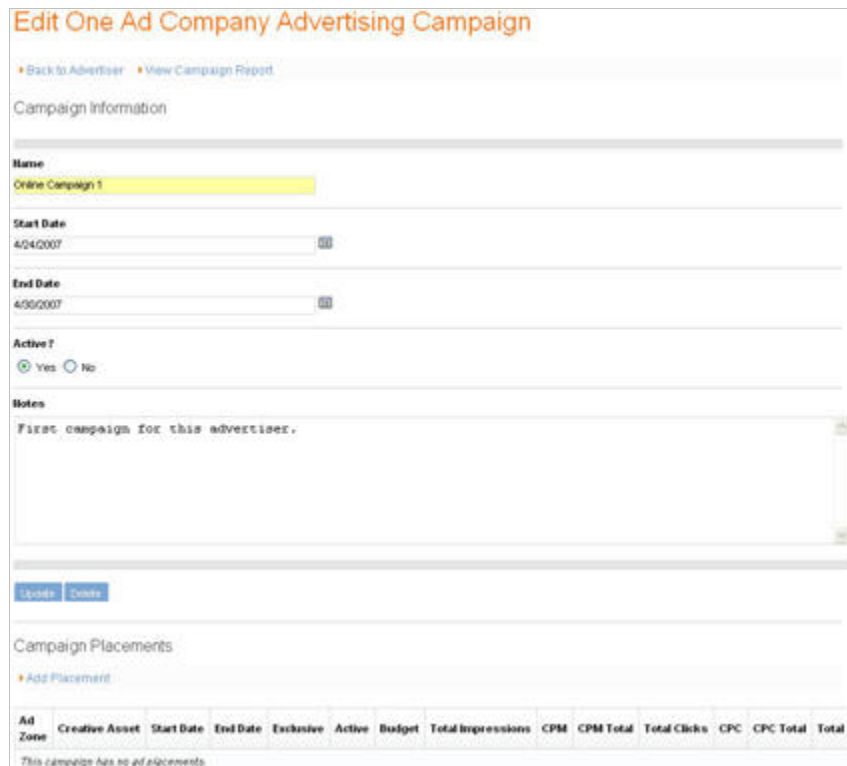
Active?
 Yes No

Notes

Edit Campaign page

2. Enter a name for the campaign in the **Name** field.

3. Enter a start date in the **Start Date** field by clicking the calendar button and selecting a date from the dialog.
4. Enter an end date for the campaign in the **End Date** field by clicking the calendar button and selecting a date from the dialog.
5. Select the **Yes** radio button under **Active?** if you wish to keep the campaign active.
6. Enter notes in the **Notes** box if necessary.
7. Click **Add**. The new campaign is added. The page refreshes to display the new campaign in the Edit Campaign page along with other options to **Create a Campaign Placement** and **View Campaign** reports.



Edit Campaign page with other functionality for the new campaign

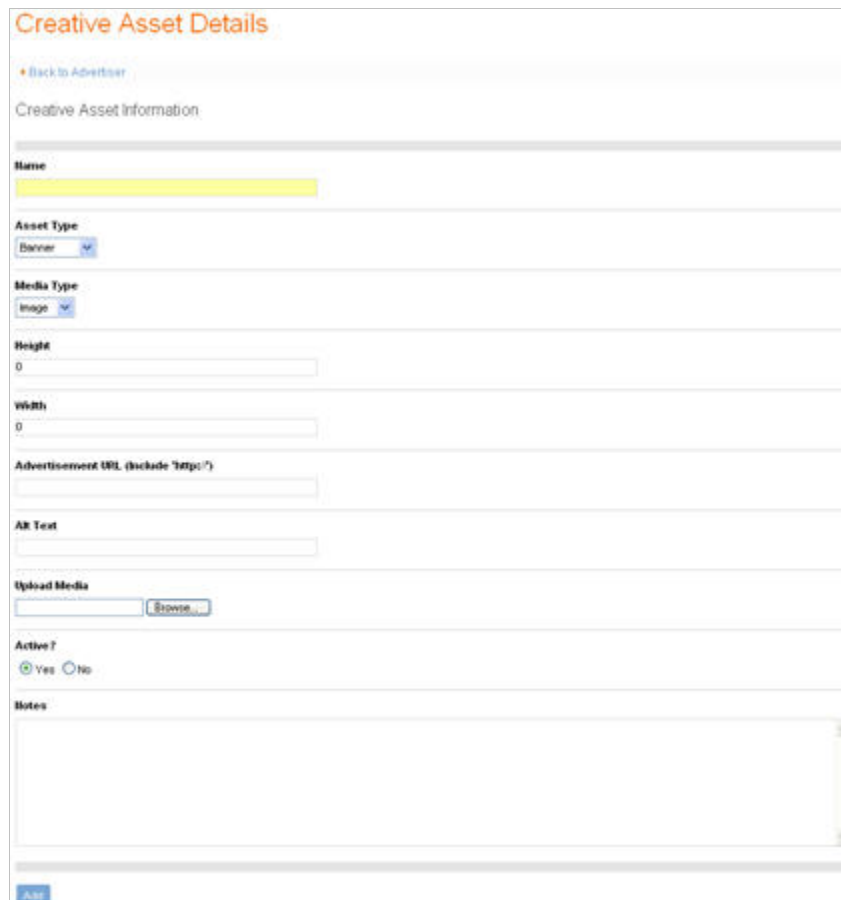
You may choose to create a campaign placement now or later.

13.5 Adding Creative Elements

A creative is the visual component of the advertisement. In order to set up an advertising campaign, a creative must be available for placement. Creative types can be, but not limited to Banner Ads, Skyscraper Ads and Content Ads.

To create a creative asset

1. From the Advertiser Summary page for the advertiser, click the **Add Creative** link.
The **Creative Asset Details** page opens.



Creative Asset Details page

2. Enter a name for the asset in the **Name** field.
3. Select an asset type from the **Asset Type** drop-down list. Choose from Banner, Content Ad or Skyscraper.
4. Select a media type (Image, Text or Flash v. 5 -7) from the **Media Type** drop-down list.
5. Enter a height for the creative asset in pixels in the **Height** field.
6. Select a width for the creative asset in pixels in the **Width** field.

Note: The width and height of the creative asset must not be greater than the width and height of the ad zone where the creative asset is to appear.

7. Enter the URL of the website where the creative asset will link to in the **Advertisement URL** field.
8. In the **Alt Text** field enter a text message that will appear when a user moves their mouse over the creative element.
9. Click the Browse button of the Upload Media field to browse your personal computer or network to select an image to use for this creative asset.
10. Under **Active?** select the **Yes** radio button to make the creative asset active.
11. Enter notes related to the creative asset in the **Notes** field.



12. Click **Add**.

13.6 Adding Campaign Placements

To create a placement for a campaign

1. Click the **Add Placement** link in the **Campaign Placements** section of the **Edit Campaign** page for the campaign.
2. The **Edit Placement** page for the campaign opens.

Edit Online Campaign 1 Campaign Placement

[Back to Advertiser](#) [Back to Campaign](#)

Campaign Date Range: 4/24/2007 - 4/30/2007

Placement Information

Ad Zone (Dimensions - Creative Type)
 Banner Sample (H:60 X:W:240 - Banner)

Creative Asset (Dimensions - Creative Type)
 Creative Asset 1 (H:60 X:W:40 - Banner)

Start Date
 4/24/2007

End Date
 4/30/2007

Days of the Week

Days of the Week	Hours in the Day (Select All Remove All)
<input checked="" type="checkbox"/> Sunday	<input checked="" type="checkbox"/> 12:00 AM
<input checked="" type="checkbox"/> Monday	<input checked="" type="checkbox"/> 1:00 AM
<input checked="" type="checkbox"/> Tuesday	<input checked="" type="checkbox"/> 2:00 AM
<input checked="" type="checkbox"/> Wednesday	<input checked="" type="checkbox"/> 3:00 AM
<input checked="" type="checkbox"/> Thursday	<input checked="" type="checkbox"/> 4:00 AM
<input checked="" type="checkbox"/> Friday	<input checked="" type="checkbox"/> 5:00 AM
<input checked="" type="checkbox"/> Saturday	<input checked="" type="checkbox"/> 6:00 AM
	<input checked="" type="checkbox"/> 7:00 AM
	<input checked="" type="checkbox"/> 8:00 AM
	<input checked="" type="checkbox"/> 9:00 AM
	<input checked="" type="checkbox"/> 10:00 AM
	<input checked="" type="checkbox"/> 11:00 AM
	<input checked="" type="checkbox"/> 12:00 PM
	<input checked="" type="checkbox"/> 1:00 PM
	<input checked="" type="checkbox"/> 2:00 PM
	<input checked="" type="checkbox"/> 3:00 PM
	<input checked="" type="checkbox"/> 4:00 PM
	<input checked="" type="checkbox"/> 5:00 PM
	<input checked="" type="checkbox"/> 6:00 PM
	<input checked="" type="checkbox"/> 7:00 PM
	<input checked="" type="checkbox"/> 8:00 PM
	<input checked="" type="checkbox"/> 9:00 PM
	<input checked="" type="checkbox"/> 10:00 PM
	<input checked="" type="checkbox"/> 11:00 PM

Cost Per 1000 Impressions
 \$0

Cost Per Click
 \$0.00

Budget
 \$0

Exclusive
 Yes No

Active ?
 Yes No

Notes

Edit Placement page

3. Select an ad zone from the **Ad Zone** drop-down list.
 4. Select a creative asset from the **Creative Asset** drop-down list.
- Note:** Ad zones and creative assets need to be created prior to creating placements.
5. Enter a start date in the **Start Date** field by clicking the calendar button and selecting a date from the dialog.
 6. Enter an end date for the campaign in the **End Date** field by clicking the calendar button and selecting a date from the dialog.
 7. Check the appropriate boxes to allow or disallow the campaign from appearing on specific durations for the days of the week. Use the **Select All** and **Remove All** links to select or remove the checks from all the checkboxes related to time.




8. Enter a U.S. Dollar amount value in the **Cost Per 1,000 Impressions** field to set the price for the cost of 1,000 showings or display of the ad.
9. Enter a U.S. Dollar amount value in the **Cost Per Click** field to set the price for the cost for every click a viewer clicks when the ad is displayed on a web page.
10. Enter a U.S. Dollar amount value in the **Budget** field to set the ceiling on how much you or a client is willing to pay for running the ad. Once this limit is reached the ads stop showing.
11. Select the **Yes** radio button under **Exclusive** to determine if the placement will have exclusive exposure in the selected ad zone.
12. Under **Active?** select the **Yes** radio button to make the creative asset active.
13. Enter notes related to the creative asset in the **Notes** field.
14. Click **Add**. Once your campaign has been placed, the selected creative will appear in the ad zone specified

13.7 Tracking Ad Performance

You can view reports for each campaign that is placed on the website to track how well a campaign is doing, how close a client is to their budget and what their total costs are to date. You can track campaigns and placements.

To view a campaign report

1. On the **Advertiser Summary** page for an advertiser click the **View Campaign report**  button for any of the campaigns displayed.
-or-
On the **Edit Campaign** page for a campaign click the **View Campaign Report** link.
2. The **Campaign report** page is displayed for the campaign in the **Details Pane**.



Campaign Report

[Back to Advertiser](#) [Back to Campaign](#)

Campaign Information

Company: One Ad Company
Campaign: Online Campaign 1
Campaign Date Range: 4/24/07 - 4/30/07
Report Date Range: 4/24/07 - 4/30/07

Report Date Range

From To [View](#)

Month

4/2007

Ad Zone	Creative	Start Date	End Date	Exclusive	Active	Budget	Total M	CPM	CPM Total	Total Clicks	CPC	CPC Total	Total
Banner Sample	Creative Asset 1	4/24/07	4/30/07	No	No	1000	0	\$1,000.00	\$0.00	0	\$1.00	\$0.00	\$0.00
TOTALS:						\$1000	0		\$0.00	0		\$0.00	\$0.00

Total

Total M	CPM Total	Total Clicks	CPC Total	Total
0	\$0.00	0	\$0.00	\$0.00

Campaign report

By default, a report for the duration of the campaign is generated. However, you can generate a report for dates of your choice by selecting the **From** and **To** dates using the calendar buttons and then clicking **View**.

Some of the important components of the report are as follows:

- **Impressions** -- The number of times an ad was loaded on the page
- **CPM Total** -- Total Cost per impression (CPM x Impressions)
- **Clicks** -- Total number of clicks to URL
- **CPC Total** -- Total Cost per click (CPC x Clicks)
- **Click Ratio** -- Percentage of clicks per total impressions (Clicks/Impressions)

To view a placement report for a creative asset

1. Navigate to the campaign report of a campaign as explained in the previous section.
2. Click the **View Placement Report** button associated with a Creative Asset record.
3. The **Campaign Placement Report** page displays the necessary details.



Campaign Placement Report

[▶ Back to Advertiser](#)
[▶ Back to Campaign](#)
[▶ Back to Placement](#)
[▶ View Campaign Report](#)

Campaign Placement Information

Company: One Ad Company
Campaign: Online Campaign 1
Campaign Date Range: 4/24/07 - 4/30/07
Creative: Creative Asset 1 (Banner)
Ad Zone: Banner Sample
Placement Date Range: 4/24/07 - 4/30/07
Report Date Range: 4/24/07 - 4/30/07
Report Date/Time: 4/25/07 10:08 AM
Budget: \$1,000.00
Cost Per Impression: \$1.00
Cost Per Click: \$1.00

Report Date Range

From  To  [View](#)

No activity has been recorded for this creative within the specified date range.

Campaign Placement Report

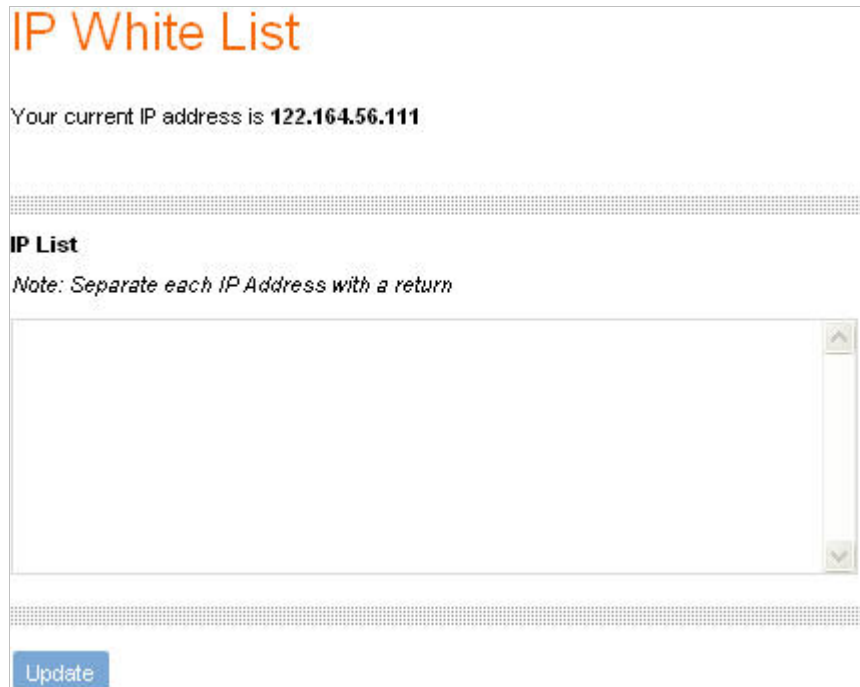
By default, a report for the duration of the campaign is generated. However, you can generate a placement report for dates of your choice by selecting the **From** and **To** dates using the calendar buttons and then clicking **View**.

13.8 Setting IP White List

Using this option you can maintain a white list of all I.P addresses.

To set the IP white list

1. Click **IP White List** under **Advertising** on the **Left Panel** menu. The IP Address list is displayed in the **Details Pane**.



IP White list page

2. Enter IP addresses in the box separating each with a carriage return (i.e., each IP address must be on a separate line).
3. Click **Update** when done.

13.9 Setting Permissions

You can also set permissions for the **Advertisement Manager**.

To set permissions

1. Click **Permissions** under **Advertising** on the **Left Panel** menu. The **Permissions** page is displayed.



Allow	Group
<input type="checkbox"/>	Group1

Setting Permissions for groups

2. Check the **Allow** box for a group or groups for which you would like to have access.



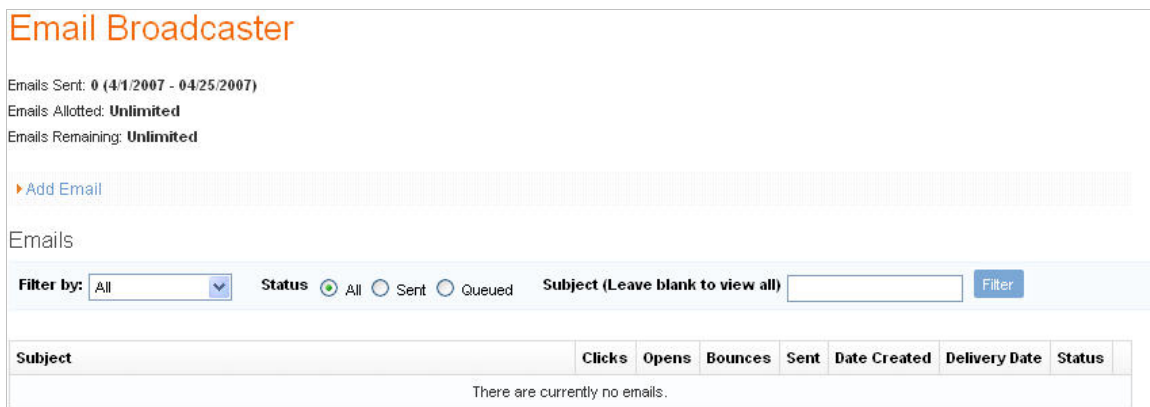
3. Click **Update**.

14. E-mail Broadcasting

Sava has a powerful, but easy-to-use E-mail Broadcaster that can be used for marketing and communicating with your site's user base, including sending support e-mails and general group communication.

You can set up templates, compose your message in our visual editor, send e-mails to one or many user groups, track opens and click-throughs, and much more.

To view existing e-mails click **Email Broadcaster** in the **Left Panel** menu. The web page refreshes to display the **Email Broadcaster** page in the **Details Pane**.



The screenshot shows the 'Email Broadcaster' interface. At the top, it displays 'Emails Sent: 0 (4/1/2007 - 04/25/2007)', 'Emails Allotted: Unlimited', and 'Emails Remaining: Unlimited'. Below this is a button labeled 'Add Email'. The main section is titled 'Emails' and contains a filter bar with a dropdown menu set to 'All', radio buttons for 'All', 'Sent', and 'Queued' (with 'All' selected), a text input field for 'Subject (Leave blank to view all)', and a 'Filter' button. Below the filter bar is a table with columns: 'Subject', 'Clicks', 'Opens', 'Bounces', 'Sent', 'Date Created', 'Delivery Date', and 'Status'. The table is currently empty, and a message below it states 'There are currently no emails.'

Email Broadcaster page

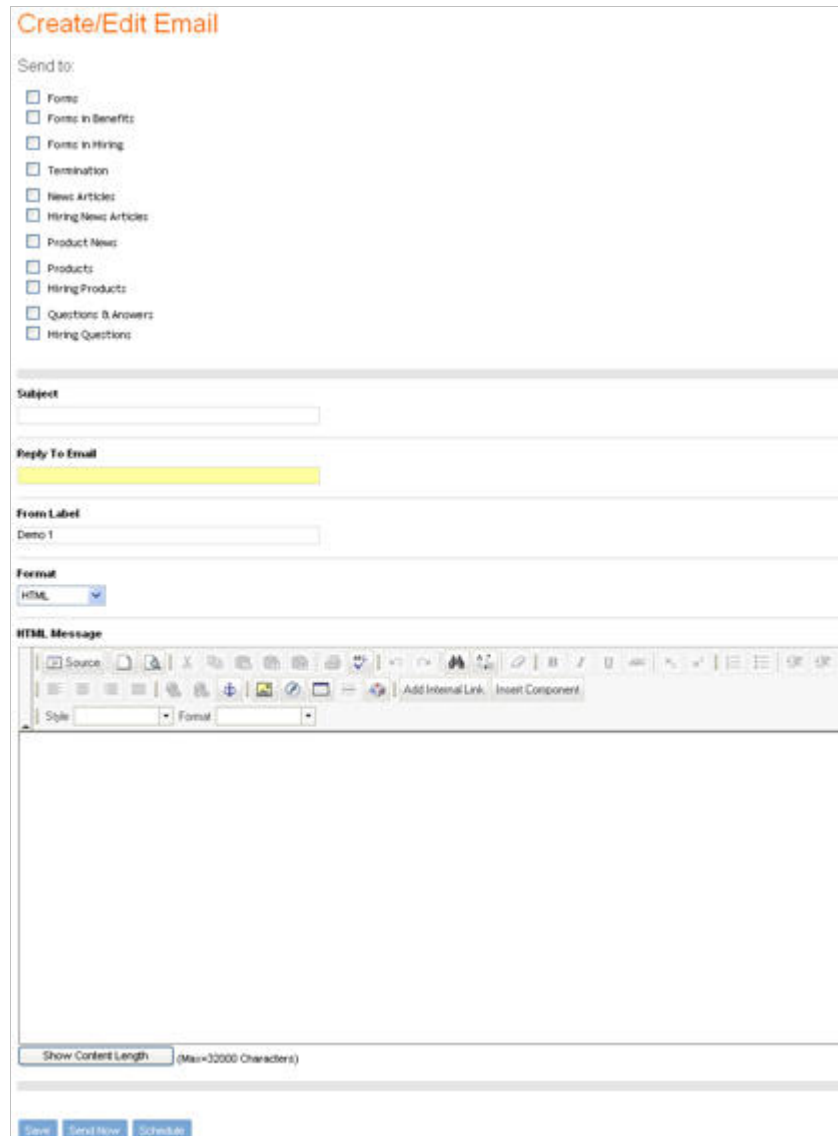
Note that you can search for e-mails by using the fields of the **Filter**. You can search by subject name of an e-mail, status or by group.

14.1 Adding E-mails

You can add e-mails using the **Email Broadcaster**.

To add emails

1. Click the **Add Email** link on the **Email Broadcaster** page.
2. The **Create/Edit Email** page opens.



Create/Edit Email page


3. Select the categories to which e-mail is to be sent by checking the related checkboxes.
4. Enter a subject for the e-mail in the **Subject** field.
5. In the **Reply to Email** field enter your e-mail address so that the recipient can reply to you.
6. The **Form label** field is already filled by default.
7. Select a format for the e-mail from the **Format** drop-down list.
8. Compose the e-mail in the HTML message box using the tools displayed. You can also insert links and components. For more information refer to the [Working with content](#) chapter.

9. Finally, click **Save** to save the e-mail, **Send** to send the e-mail or **Schedule** to schedule the sending of the e-mail.

Clicking the Schedule button displays additional fields as shown below.



Schedule fields

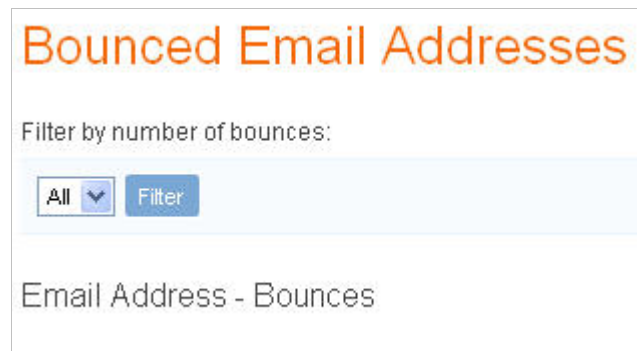
In such a case, select a date by clicking the **Calendar**  button and select a time from the drop-down fields and click **Save**.

14.2 Tracking Bounced E-mails

Sava helps you to track bounced e-mails.

To manage bounced e-mails

1. Click **Bounced Emails** under **Email Broadcaster** in the **Left Panel** menu. The **Bounced Email Addresses** page is displayed.



Bounced Email Addresses

2. You can filter the addresses by selecting a number of bounce(s) from the drop-down list and clicking **Filter**.

14.3 Setting Permissions

You can also set permissions for the **Email Broadcaster**.

To set permissions

1. Click **Permissions** under **Email Broadcaster** on the **Left Panel** menu. The **Permissions** page is displayed.

Permissions

To set permissions for *Email Broadcaster*, simply check the box of the User Groups you'd like to have access.

Allow	Group
<input type="checkbox"/>	Group1

[Update](#)

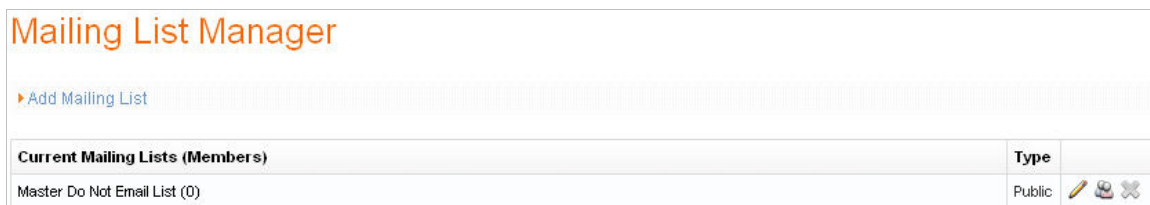
Setting permissions for groups

2. Check the **Allow** box for a group or groups for which you would like to have access.
3. Click **Update**.




15. Managing Mailing Lists

A **mailing list** is a collection of names and addresses used to send e-mail to multiple recipients. In Sava, you can create as many mailing lists as you like. When you send mail using the E-mail Broadcaster, you can choose to send to one or many of these mailing lists.

To view mailing lists, click **Mailing Lists** from the **Left Panel** menu. The **Mailing List Manager** and the mailing lists of the system are displayed. The number of members of a list is displayed within parentheses beside the mailing list's name.



The screenshot shows the 'Mailing List Manager' interface. At the top, there is a header 'Mailing List Manager' in orange. Below it is a link 'Add Mailing List'. A table lists the current mailing lists. The table has two columns: 'Current Mailing Lists (Members)' and 'Type'. One row is visible with the name 'Master Do Not Email List (0)' and the type 'Public'. To the right of the 'Public' type are three icons: a pencil (edit), a person (add), and a trash can (delete).

Current Mailing Lists (Members)	Type
Master Do Not Email List (0)	Public   

Mailing List Manager page

You can edit a mailing list displayed in this page by clicking the Edit button associated with the list. The list is opened in the Mailing List Manager that is used to create a manager but with the additional **Usage** tab and a checkbox for **Clear out existing members?**

15.1 Creating New Mailing Lists

To create a new mailing list

1. Click the **Add Mailing List** link from the **Mailing List Manager** page.
2. The page refreshes to display the Mail List Manager page with additional fields.

Mailing List Manager

Name

Type
 Public Private

Description

Upload List Maintenance File (Optional)
 Add addresses to list
 Remove addresses from list
 Replace mailing list with list from file

Upload Email Address File

Creating a new list using the Mailing list manager

3. Enter a name for the mailing list in the **Name** field.
4. Select either the **Public** or **Private** radio button under **Type**.
5. Enter a brief description of the mailing list in the **Description** field.
6. Select one among the three radio buttons related to Uploading the list maintenance file under **Upload List Maintenance File (Optional)**. This is an optional step.
7. To upload an e-mail address file click **Browse** to browse and select your computer for the address file.
8. Click **Add**. The page refreshes to display additional fields where you can enter member details.



Mailing List Manager

▶ Mailing List Manager ▶ Edit NewList Mailing List ▶ Download NewList Members

Email Address

First Name

Last Name

Company


Subscribe Unsubscribe

NewList List Member Count: 0


Email Address	Name	Company	Verified
There are currently no members of this mailing list.			

Adding members to list

9. Enter the details of the fields of the member, select the **Subscribe** or **Unsubscribe** radio button and click **Submit**. The member is added to the list and the page refreshed to display the same fields to add the next member.

Email Address			
<input type="text"/>			
First Name			
<input type="text"/>			
Last Name			
<input type="text"/>			
Company			
<input type="text"/>			
<input checked="" type="radio"/> Subscribe <input type="radio"/> Unsubscribe			
<input type="button" value="Submit"/>			
NewList List Member Count: 1			
Email Address	Name	Company	Verified
robertwhite@email.com	Robert White	ABCDE Company	Yes 

Member added to mail list

10. Repeat procedure to add more members. To delete a member click the **Delete**  button. A confirmation dialog opens and clicking **OK** deletes the member.

Note: You can also add members to a mailing list by clicking the **View Membership**  button associated with a mailing list on the main **Mailing List Manager** page.

15.2 Download a Mailing List's Members

You can download a list of members of a mailing list into a text file.

To download mailing list's members

1. Click the **Download (name of list) members** link from any of the pages that display the link while editing or adding members to the link.
2. The windows standard file save dialog is displayed from where you can save or open the text file containing the list of members for the list.

15.3 Setting Permissions

You can also set permissions for the **Mailing List Manager**.

To set permissions

1. Click **Permissions** under **Mailing Lists** on the **Left Panel** menu. The **Permissions** page is displayed.

Permissions

To set permissions for *Mailing List Manager*, simply check the box of the User Groups you'd like to have access.

Allow	Group
<input type="checkbox"/>	Group1

[Update](#)

Setting permissions for groups

2. Check the **Allow** box for a group or groups for which you would like to have access.
3. Click **Update**.

16. Permissions

16.1 Setting Permissions for Content Manager

You can also set permissions for the Content Manager.

To set permissions

1. Click **Permissions** on the **Left Panel** menu. Note that this is the last option on the **Left Panel** menu. The **Permissions** page is displayed.



Allow	Group
<input type="checkbox"/>	Group1

Update

Setting permissions for groups

2. Check the **Allow** box for a group or groups for which you would like to have access.
3. Click **Update**.

17. Administration





Under this chapter you will learn how to create administrative users and groups. A group comprises of one or more users. Users and groups are the primary people who will use your **Sava** system. In the process of creating groups and users, first create the group and then users so that you can assign the user to a group while creating the user. Note that only a user with an administrator login can create users and groups. As an administrator you can also edit your profile.

To view the current groups of the system, click the **Administrative Users** link of the menu bar. The **Administrative Users and Groups** page is displayed.



Adminstrative Users & Groups

Search for Administrative User

Administrative User Groups

Name (Members)	Email	Update	Author/Editor	
Admin (1)				 
Group1 (0)	group1@email.com	4/13/07 7:35 AM	E lance Writer	 

Users and Groups

From this page you can edit a group or user by clicking the **Edit**  button or the **Delete**  button associated with that group or user's record. The **Edit** button opens the **Administrative Group Maintenance Form** page from where you can both edit or delete the group. The **Delete** button opens the confirmation dialog and clicking **OK** will delete the group's or user's record.

The number of members in a group is indicated by the number within parentheses beside the group's name. You can search for users with the **Search** functionality just as you did for **Site Members**. **Search** is basic in this case; there are no advanced search functions for administrative users.

17.1 Creating Groups

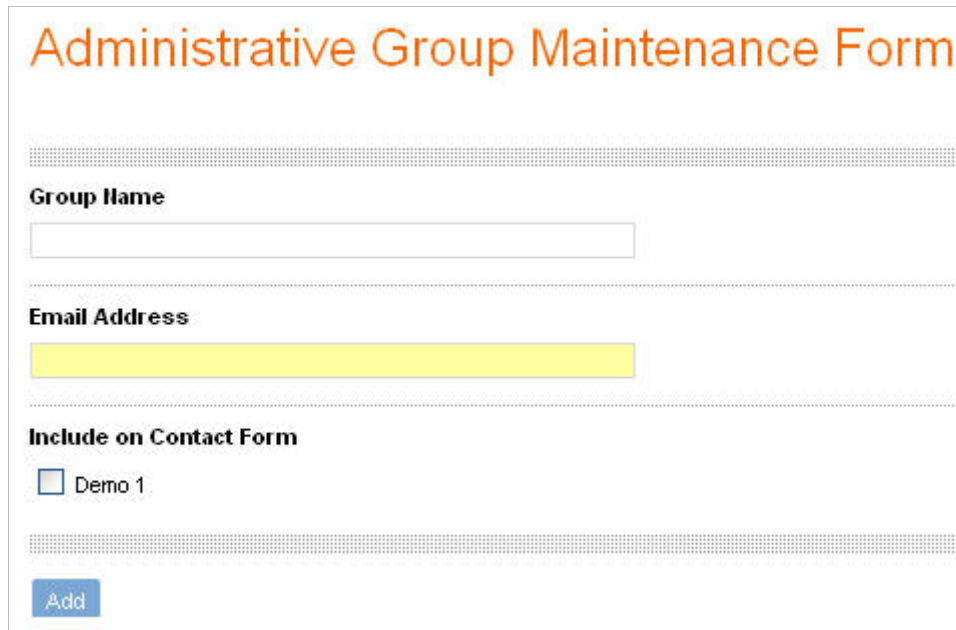
To create a group

1. Position your mouse over the **Administrative Users** link of the menu bar on the top right of the page. The menu is displayed as shown below.



Admin menu

2. Click Add Group. The Administrative Group Maintenance Form page is displayed.



The image shows a web form titled "Administrative Group Maintenance Form". It contains three main sections:

- Group Name:** A text input field.
- Email Address:** A text input field with a yellow background.
- Include on Contact Form:** A section with a checkbox labeled "Demo 1".

 At the bottom left of the form is a blue button labeled "Add".

Creating a group page

3. Enter a name for the group in the **Group Name** field.
4. Enter an e-mail address in the **Email Address** field. This field is used to contact the group.
5. Check the checkbox for the site under **Include on Contact Form** to include the group on the site.
6. Click **Add**.

17.2 Creating Users

To create a user

1. Position your mouse over the **Administrative Users** link of the menu bar on the top right of the page. The menu is displayed as shown below.



Admin menu

2. Click **Add User**. The **Administrative User Maintenance Form** page is displayed. By default the **Basic Tab** is opened.



Administrative User Maintenance Form

*Required, **Required to login to Site

Basic Address Information Group Memberships Interests Advanced

First Name*

Last Name*

Organization

Job Title

Mobile Phone

Email Address*

Username**

New Password**

New Password Confirm**

Add

Creating a user

Note: All fields marked with a double asterisk (**) are mandatory and must be filled.

- For details of how to enter information into the fields of the **Basic** tab and other tabs, see the similar section on creating a member under [Creating a Member](#).

17.3 Editing Your Profile

As an administrator you can edit your own profile.

To edit your profile

1. Click the **Edit Profile** link of the menu bar. Your profile is displayed in the **Edit Profile** page. By default, the **Basic** tab is opened.
2. Change or edit the contents of the fields. Note username and password fields if they are being changed.
3. Browse other tabs **Address Information**, **Interests** and **Advanced** and change contents accordingly. Under the **Address Information** tab, click the **Edit** button to edit details.
4. Finally click **Update** when done.



18. Appendix



Notes