Verdi Enterprise CMS

V4.2 User Guide

User Manual Version 2.0

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1 Getting Started with Verdi

The Verdi Enterprise CMS, also known simply as Verdi, has been selected as the Website management tool.

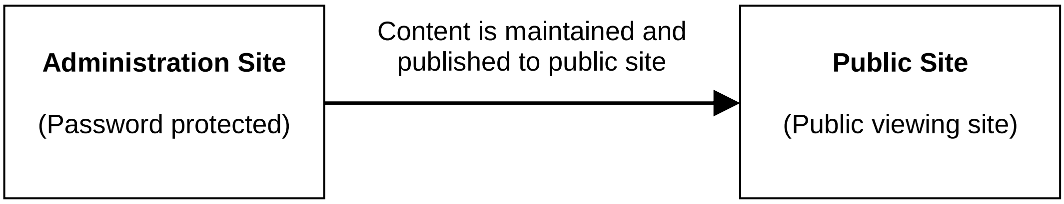
What is a Content Management System (CMS)?
A CMS is a system that allows non-technical people to efficiently and easily manage a website.

Verdi is designed to provide maximum ownership to all users, reducing the cost of support and maintenance to the Portal. This comprehensive Content Management System (CMS) provides a dynamic communication hub between the organisation and its stakeholders.

There are two main areas within Verdi:

1. **The Administration**, where the management of Verdi is controlled and conducted through a secure, password protected login.

2. **The Public Site**, which is generally accessible by all users, unless sections require a login to access.



This User Guide is focussed on using the Administration options. It describes all functionality within the Verdi Admin area for:

- Site Administrators
- Content Administrators
- Content Publishers
- Structure Administrators

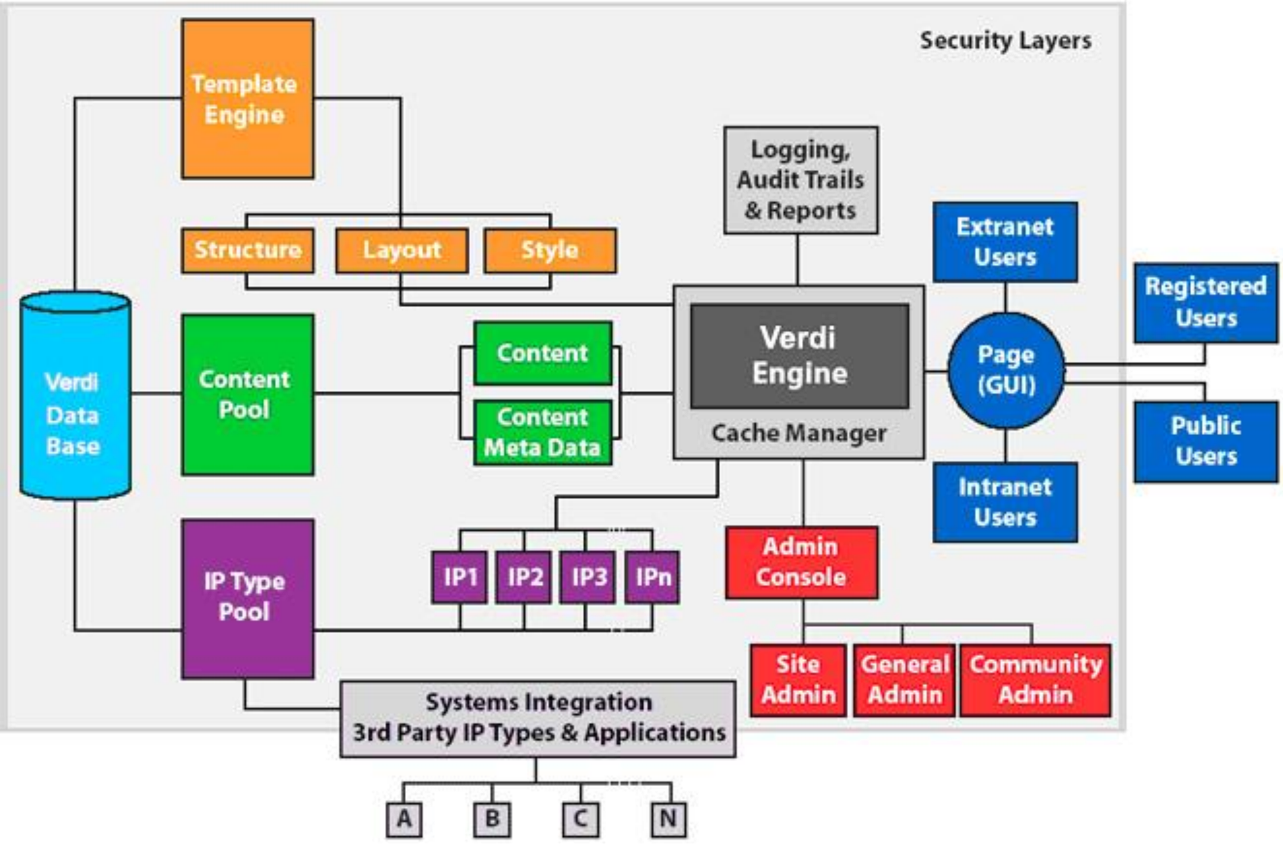
An Advanced User Manual is also available for System Administrator functionality.

1.1 An Overview of Verdi

Verdi is designed to allow authorised content administrators, authors and editors in an organisation to easily manage their individual content areas via a simple, yet secure, web interface, without the need for special HTML or scripting skills.

There are two major components to the Verdi system: the public website and a corresponding Administration Console. The former is available either to the general public or a defined subset of users depending on whether it is an Internet, Intranet or Extranet site, while the latter is available only to designated personnel with content management privileges.

1.1.1 System Overview



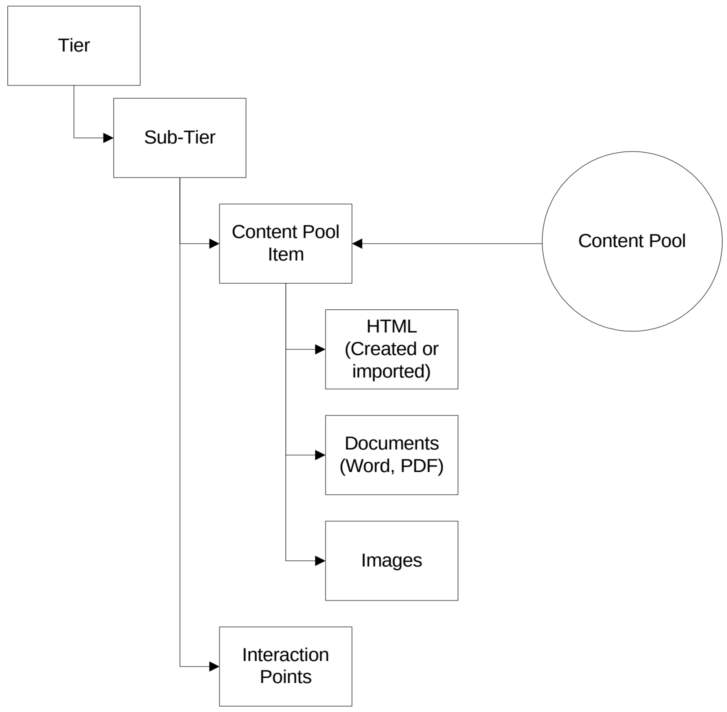
1.2 Definitions of Key Verdi Elements

1.2.1 Pages & Tiers

The structure of Verdi is based on Tiers, which are the levels of the information hierarchy within the website. Each category (eg Education) or sub-category (eg Primary Schools) of information within a Tier is called a Tier Element. Tiers are numbered from 0 to 3. Consider the illustration of Tier numbering below, based on an extract of a site structure consisting of a single Tier 1 element and the Tier 2 and 3 sub-tiers below it.

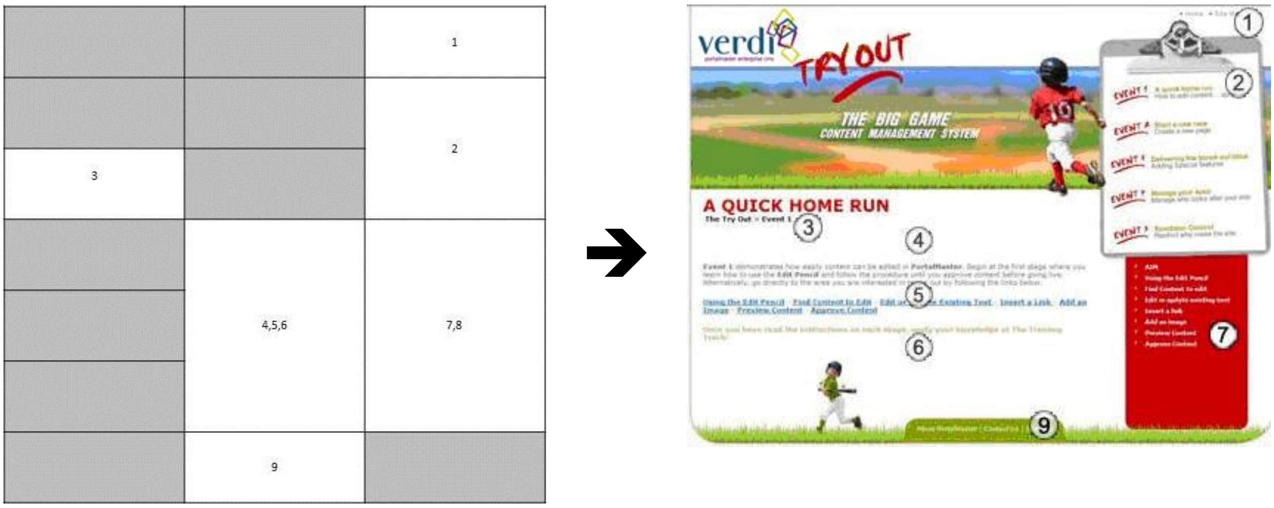
Tier 0	Tier 1	Tier 2	Tier 3
Homepage	Things to See & Do	Outdoor	Bushwalking Birds & Animals The Rocks Trail Beacon Lookout
		Sports & Recreation	Skate Park Gymnasium Tennis Squash Aussie Rules Football Little Athletics
		Heritage	Phoenix Heritage Park Heritage Trail Statue of Norseman
		Facilities	BBQ Internet Access Church Tourist Bureau

Authorised Verdi Administrators can add, edit and delete Tier Elements at will, thus changing the structure of the Website.



1.2.2 Grids & Templates

The public or end-user side of Verdi Website pages are broken up into segments.



Tier Templates are used to define what **features** (see below) users of the Verdi Administration may select to display in the individual grid segments for any given Tier of the site.

The templates that control this are pre-configured by the developers of your site. These templates may be configured, for example, such that segment 1 is reserved exclusively for site navigation, segment 2 for the display of the Tier Element title, segment 3 for breadcrumbs, segment 4, 5 & 6 is available for a choice of Inline Content, News or Events, segment 7 & 8 for secondary navigation or featured content, and section 9 for Footer Utility Links. Different templates may be used for the various Tiers of the site. Generally Tier 0 (the homepage) would have the least flexibility in terms of interaction point placement, with greater flexibility available at lower levels.

1.2.3 Features or "Modules"

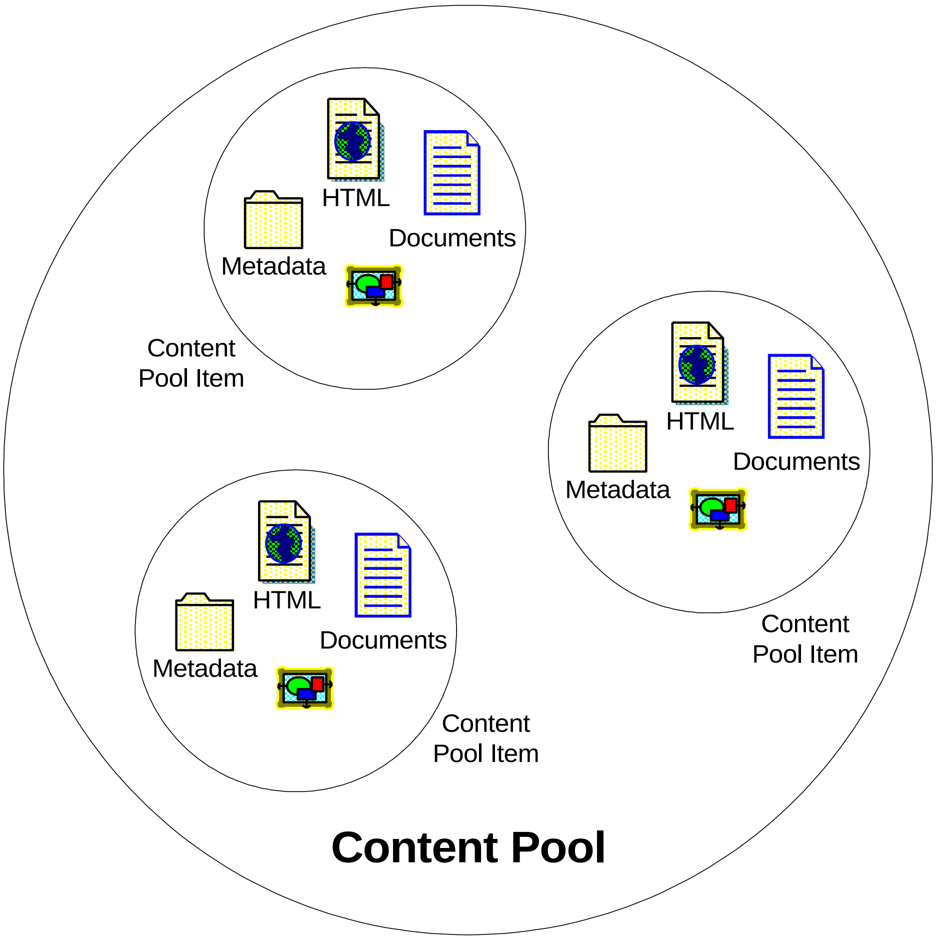
Features are points on a page that enable the user to interact with your organisation in some way. These include but are not limited to:

- Inline content (text displayed on web page)
- Login boxes
- Email subscription sign-up boxes
- Events Calendars
- Links
- Forms
- Polls
- Navigation

When creating a Tier Element you may specify what features should appear in the various grid spaces available in the page layout for that Tier.

1.2.4 The Content Pool

All of the content of your site is stored in your **Content Pool**, within **Content Pool Items**. Content Pool Items can be thought of as “wrappers” around the individual files of content of your site. In addition to the actual content – HTML pages, documents or images – each Content Pool Item contains **metadata** about the content of the “wrapper”. This metadata includes information such as publish and archive dates for the Content Pool Item, its owner and its location within the website. A single Content Pool Item or “wrapper” may contain multiple files.

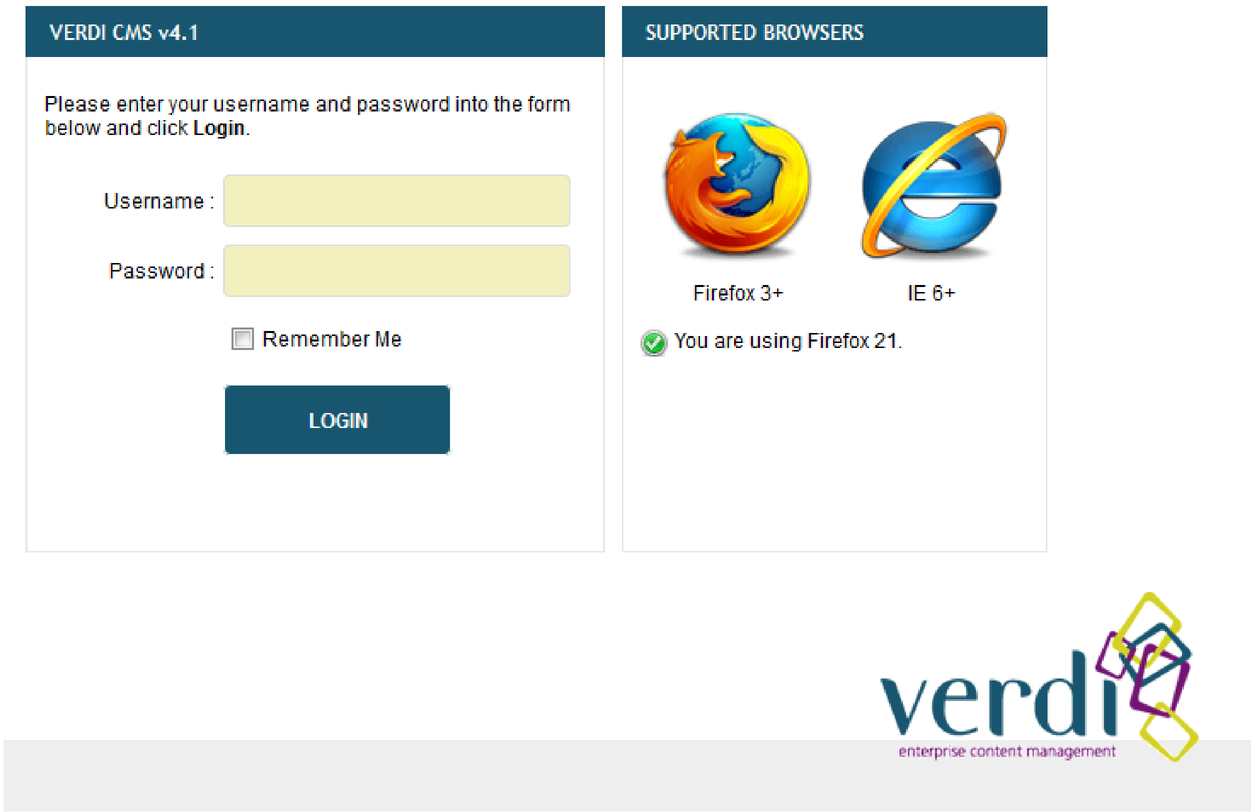


Each Content Pool Item is treated as a single entity, even if it contains multiple files. Content Pool Items are added to Tier Elements to create the Website pages that are displayed to end-users. Tier Elements may contain multiple Content Pool Items.

1.3 Logging In and Logging Out of Verdi

1.3.1 Logging In

1. Open your web browser and type your Website Administration address into the Address bar
2. The Verdi Login will appear



3. Enter your username in the ***Username*** text box
4. Enter your password in the ***Password*** text box
5. Click once on the ***Login*** button
6. The Verdi Administration page should appear and your name should be displayed at the upper left of the screen

> ***Note**: If you have entered either your username or password incorrectly, an alert will be displayed. Click on 'Back to Login Page' and re-enter your details*

7. Depending on your role, the full Verdi Administration Index page will be displayed. Certain sections of the Administration index will not be displayed if you do not have permission or access.

1.3.2 Logging Out

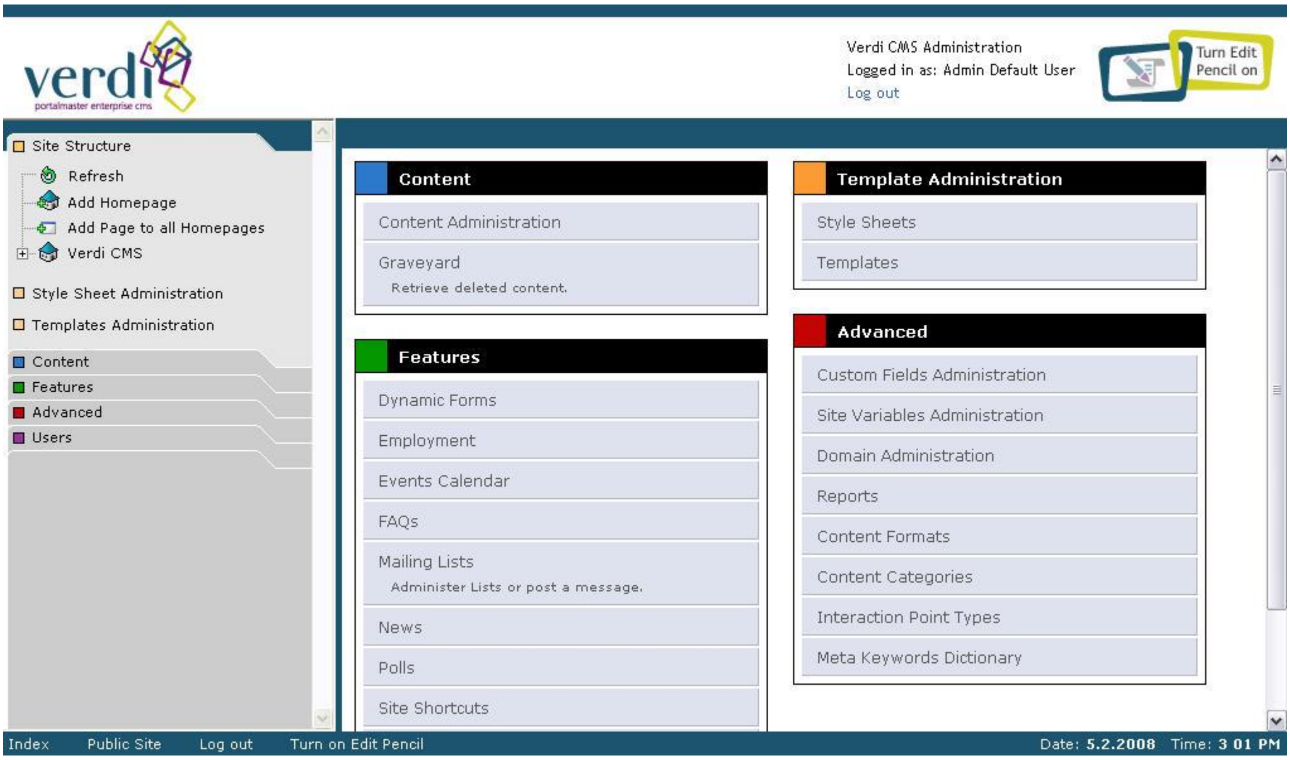
1. Click once on the ***Log Out*** link located in the page footer. The Verdi Login Page should appear.

> ***Note:** The Verdi Administration will automatically logout after a period of inactivity*

1.4 Verdi Interface & Navigation

1.4.1 Interface Overview

Once you have logged in successfully, the Index page will be displayed. This page displays links to all the functions available within Verdi.



Above: Verdi Administration Interface

Top Header

This area shows the users name that is logged in and the name of the administration system.

The Edit Pencil allows users to click on the public site and be directly linked to that content within the administration areas. By selected the pencil icons, you can turn the edit pencil function on and off:

Edit pencil is turned off.

Edit pencil is turned on.

Left Hand Navigation

The left hand navigation occupies the main administrational navigation. Note: See 1.4.2 for further information on the navigation areas.

Main working page

This is the main area of the site where the administration pages will appear. The default page is the Index page.

Footer Utility Links

Index:	This link returns users to the Index page.
Public Site:	This link opens the public site in a new browser window.
Log Out:	This link logs the user out of the administration system.
Turn on Edit Pencil:	This link allows the users to activate and deactivate the edit pencil.

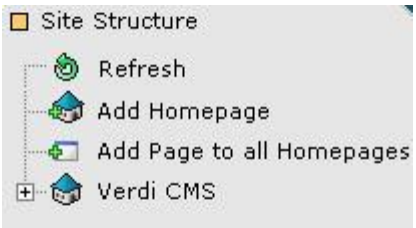
The current time and date are also displayed in the bottom right hand corner.

1.4.2 Introduction to Navigation & Function Areas

The navigation is divided into seven main areas:

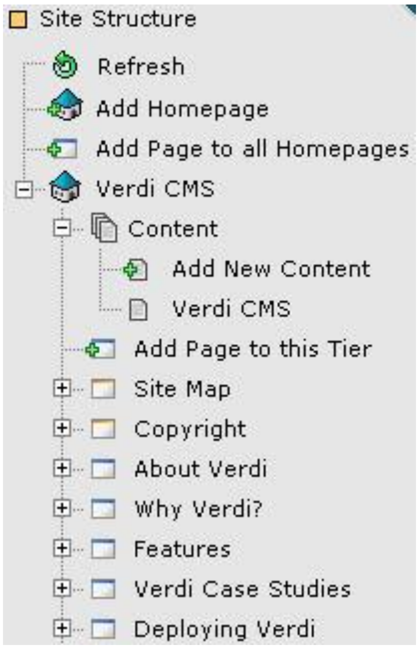
1. **Site Structure**
2. **Style Sheet Administration**
3. **Templates Administration**
4. **Content**
5. **Features**
6. **Advanced**
7. **Users**

SITE STRUCTURE



The Site Structure area allows you to adjust all of the content and structure within your site. The use of a tree structure also allows you to clearly view the organisation of information and navigation pages.

Users can refresh the content administration tree structure, revealing any structure updates.



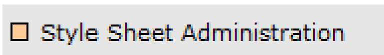
The navigation uses a tree structure. Selecting the ⊞ icon will expand a tree, and the ⊟ icon will reduce the tree structure view.

The Site Structure maintains all the homepages, tiers and content pages within your site.

The content expand allows you to add a content pool item to a particular tier.

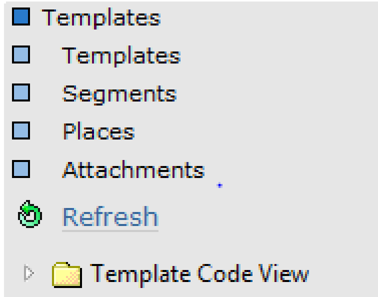
Users can add pages to a tier. For example: you can have a main category (Tier 1) then add a sub category (Tier 2) underneath it.

STYLE SHEET ADMINISTRATION



The Style Sheet Administration area relates to the font, colour and layout styles used within the content pages of the site. This area can only be edited by high level system administrators.

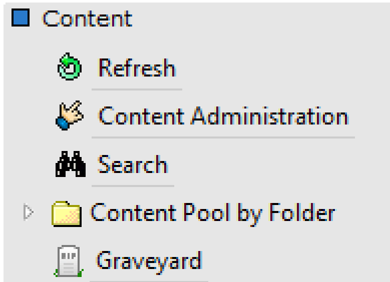
TEMPLATES ADMINISTRATION



The Templates Administration area relates to the template layouts used within the pages of the site. Users can add and delete templates, and edit the individual segments, places and attachments within templates.

CONTENT

The Content navigation area provides users with an additional way to organise and modify content within the site.



The Content Administration area allows high level administrators to search for content and modify workflows.

The search function allows users to search for particular items of content.

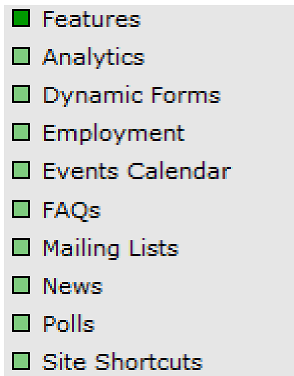
The Content Pool stores all the content within your site within **Content Pool Items**. Content Pool Items can be thought of as “wrappers” around the individual files of content of your site, such as HTML pages, documents or images.

This area is useful when a structure has not been decided on yet. Content publishers can write content, without assigning it a location straight away.

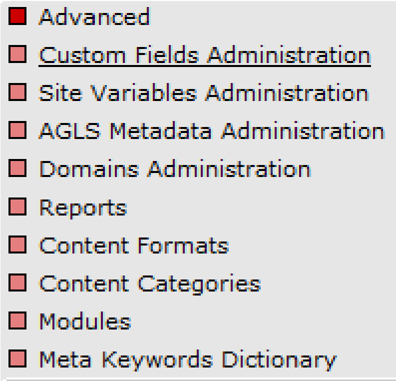
The Graveyard is where Content Pool Items are sent after they have been deleted. Content items can be searched for and restored.

FEATURES

The Features navigation area allows users to add and modify particular features within the site. Also known as Modules, features consist of functions that allow users to interact with your site.



ADVANCED



The Advanced navigation area allows high level system administrators to manage the advanced settings of your site.

Tasks within this area can include:

- Managing the domain settings for the site
- Defining administrator mail settings
- Modifying WYSISWG functions
- Adding or modifying module types
- Adding or modifying content formats
- Adding or modifying content categories
- Maintaining the Meta Keywords Dictionary (Adding or modifying meta keywords)
- Viewing administration reports, such as a list of broken links, unlinked files or complete listing of registered user permissions.

USERS

The Users area manages the users who have access to the administration area and password protected areas of the public site. Users can be maintained individually or as part of a group.

The Verdi Roles & Activities allows high level system administrators to modify the administration and public permissions.

1.4.3 Common Navigation and Icons

Tab Based Navigation

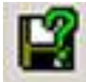
The various steps involved in creating and publishing content are controlled using a series of tabs, which relate to the different steps in content management. This tab-based approach provides a far more logical progression through the content creation process and eliminates the need to scroll down the page to find the next action.

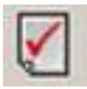
Content Publishing Icons

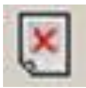

NEW
Adds new folder or content pool item.


DELETE
Deletes the content you are working on and sends it to the Graveyard.


SAVE
Saves the content you are working on.


SAVE AS


APPROVE/ PUBLISH CONTENT
Approves the content and publishes it live to the public site.


DENY PUBLISH CONTENT
Denies the content from going live to the public site.


ADD TO WORKFLOW GROUP

The Edit Pencil

The Edit Pencil allows users to quickly and easily find and edit existing content, by clicking on the public site and being directly linked to that content within the administration areas.

By selected the pencil icons, you can turn the edit pencil function on and off:

Edit pencil is turned off.

Edit pencil is turned on.

1.5 Administration Users & Workflow

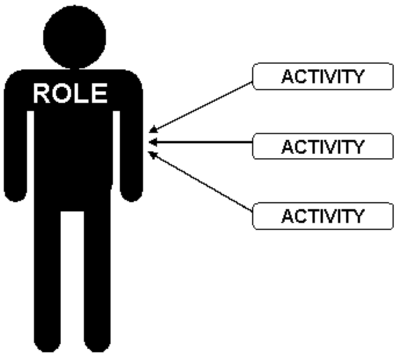
The Verdi administration interface allows the management of administration users and their permissions to modify the public site.

Permissions, Roles and Activities

Users' access to the functions of the administration system is dependent on their assigned role in the content management process.

To define access levels, Verdi has several defined **Administration Roles**:

- System Administrator
- Site Administrator
- Content Publisher
- Structure Administrator
- Content Administrator
- Advanced Workflow User



Each role is delegated a set of activities, which act as permissions to what functions they can access within their Verdi administration area. See figure below:

The following table defines the default activities given to each role within Verdi 3.2:

ACTIVITY		ROLES					
Name	**Description**	**System Admin**	**Site Admin**	**Content Publisher**	**Structure Admin**	**Content Admin**	**Advanced Workflow User**
Configure and administer entire Verdi System	Access to system configuration utilities such as database and file settings.	✓	✗	✗	✗	✗	✗
Administer the site (not configuration utilities)	Access to everything in Verdi Admin except configuration utilities.	✓	✓	✗	✗	✗	✗
Add and modify content items and assign to structure	Allows users to add, edit and delete content from content folders and assign content to structure pages.	✓	✓	✓	✓	✓	✗
Approve and publish content	Allows users to publish content when not using the advanced workflow module.	✓	✓	✓	✗	✗	✗
Administrate Content Pool Folders	Allows the user to add, edit, delete and move folders.	✓	✓	✓	✗	✗	✗
Administrate Site Structure	Allows the user to administer the site structure.	✓	✓	✗	✓	✗	✗
View Public Site	Public View Permission.	✓	✓	✓	✓	✓	✗
Mailing List Access	Defines user as being a member of a Mailing List, contrary to regular admin and public users.	✗	✗	✗	✗	✗	✗
Advanced Workflow Access	Allows the user to see Workflow utilities. Only valid for use with Advanced workflow module.	✗	✓	✗	✗	✗	✓

1.5.1 Different Views for Different Administration Users (Roles)

When logging into the Verdi administration area, different roles will be given different interface options.

There are three main methods for controlling access to the interface options:

1. Index Page: Selected menu items may not appear within the Index page menu.
2. Left Hand Navigation: Selected menu items may not appear within the left hand navigation menu.
3. Disabled / greyed out menu items: Menu items within the left hand navigation area are disabled (greyed out) when an administration user does not have access to modify them.

Interface Defaults for Administration Roles

	INTERFACE PERMISSIONS		
Role	**Index Page**	**Left Hand Navigation**	**Disabled items**
System Administrator	Full Permissions	Full Permissions	Full Permissions
Site Administrator	Full Permissions except no permissions to view Advanced Public Settings and menu options	Full Permissions except no permissions to view Advanced Public Settings and menu options	N/A
Content Publisher	Permissions to view Content Administration and Features menu.	Permissions to view Content Administration, Site Structure and Features menu. Site Structure and content pool items disabled in left hand menu.	Site Structure and content pool items disabled. Can only edit the content pool items the user has permissions to.
Structure Administrator	No Permissions	Site Structure menu viewable. Can only view the site structure pages the user has permissions to.	Can only edit the site structure pages the user has permissions to.
Content Administrator	Permissions to view Content Administration and Features menu.	Permissions to view Content Administration, Site Structure and Features menu. Site Structure and content pool items disabled in left hand menu.	Site Structure and content pool items disabled. Can only edit the content pool items the user has permissions to.
Advanced Workflow User	N/A	N/A	N/A

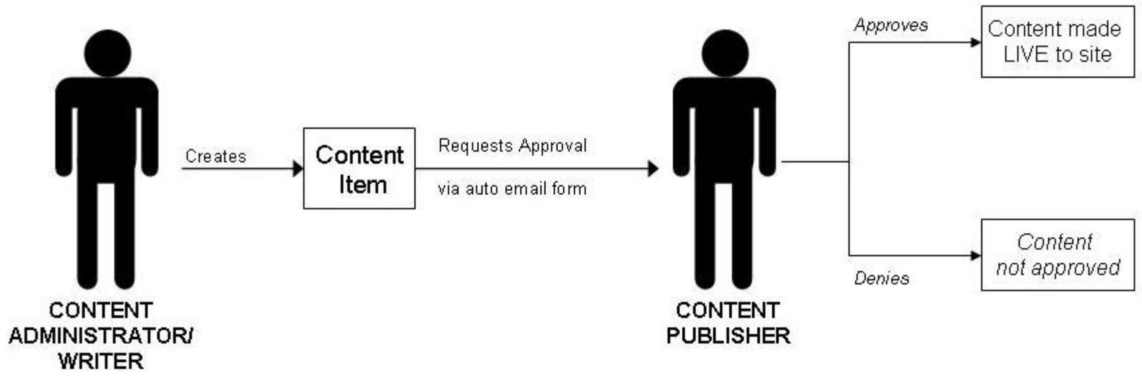
1.5.2 Content publishing Workflows & Approval Processes

Using administration user roles and activities, Verdi provides workflow and approval processes for publishing content live to the public site.

Verdi provides a default Workflow based on two roles; Content Administrators and Content Publishers. This section describes the general principles of a workflow, and default Workflow in particular. An additional **Advanced Workflow Module** is also available for Verdi which allows the publishing of content to be managed under a workflow process rather than a simple one step process, please see (**Content Approvals and Workflows**) for more details.

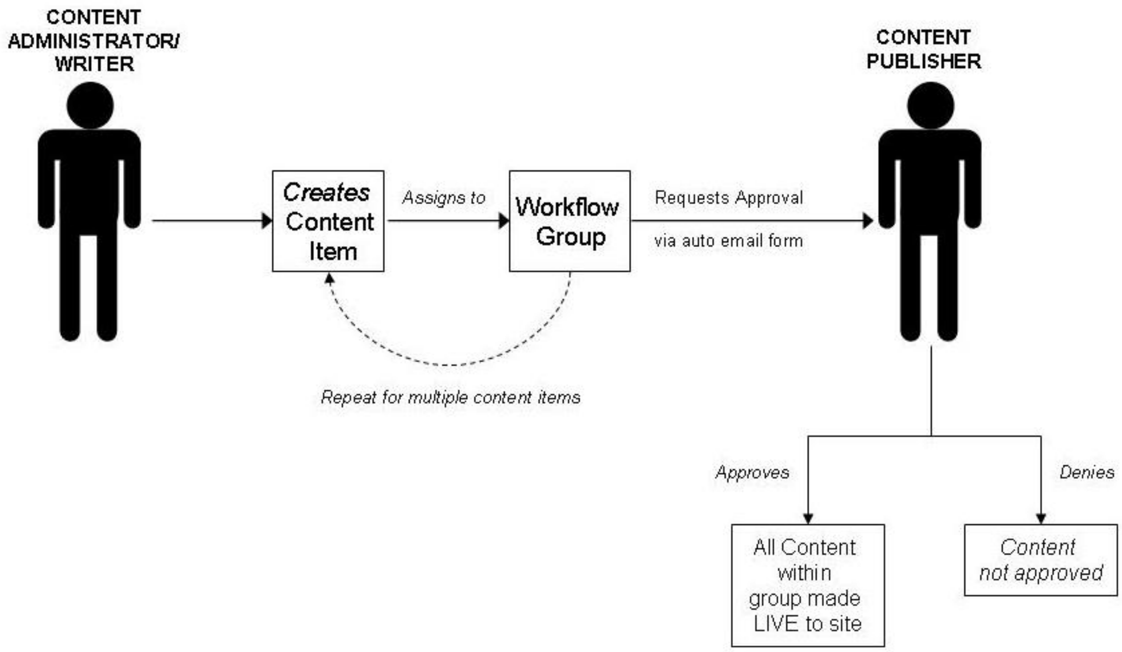
Content Administrator roles can only add and modify content pool items, they require a user who has the permission to publish content to approve the content and publish it live to the site. Default users who have activity permissions to publish content are Content Publishers, Site Administrators and System Administrators.

Approving Individual Content Items



Approving via Workflow Groups.

Workflow Groups are used to speed up the workflow approval process when requesting approval for multiple pieces of content. All content within the workflow group will be considered as one item for the workflow process and can only be approved as a group.



1.6 Content Scheduling & Archiving

1.6.1 Scheduling the Live Date for Pages, Features & Content Items

Verdi allows you to schedule pre-set dates and times for content to be made live to the site. This functionality helps you create your content without making it ‘live’ to the public site immediately.

Within each pages or features administration, the live date and time can be selected:

This feature is especially useful for releasing news items or events.

1.6.2 Archiving Pages, Features & Content Items

Verdi allows you to schedule pre-set dates for when the content should be archived. Archiving the content removes it from being viewed on the public site, highlighting the content as being no longer in use. This content is not deleted, and is still available to republish to the site.

Within each pages or features administration, the archive date can be selected. If required you can select to ***Never Archive*** an item.

1.6.3 Scheduling the Refresh Date for Pages Features & Content Items

Verdi allows you to schedule pre-set dates for when the content should be refreshed. By entering a refresh date, an email notification will be sent to remind administrators when content should be checked.

Within each pages or features administration, the refresh date can be selected.

1.7 System Requirements

Verdi supports the following web browsers on a PC platform running Win 95, 98, ME, XP, Vista***:

	Administration	Public Site	Rich Editor
Internet Explorer 9.xx	✓	✓	✓
Internet Explorer 8.xx	✓	✓	✓
Internet Explorer 7.xx	✓	✓	✓
Internet Explorer 6.xx	✓	✓	✓
Internet Explorer 5.xx	X	✓	X
Internet Explorer 4.xx	X	✓	X
Netscape 6.xx	X	✓	X
Netscape 4.xx	X	✓	X
Firefox 1.5	✓	✓	✓
Firefox 2	✓	✓	✓
Firefox 3	✓	✓	✓
Firefox 3.5	✓	✓	✓
Firefox 14	✓	✓	✓
Safari 2	✓	✓	✓

1.8 New Features in Version 4.0

It is very much IBC's method to work with our clients in partnership and to provide incremental improvements based upon user feedback. As the developers of Verdi, IBC is able to control product development. The development of future enhancements is highly influenced on the needs of our customers based upon their feedback. Following is an overview of the new features added to version 4.0:

- Improved Events Calendar Module
- Improved News Module
- Compatibility with new browsers (see Table above)
- Improved Employment Module
- New Tender Module
- New Directory Module
- New Franchise Module
- New Template Builder
- Better integration with Google Maps
- Supports more Video Formats including Windows Media, Quicktime Flash Video and Youtube Embedding.
- Supports Quicktime playback for the IPad
- Improved SEO URL masking

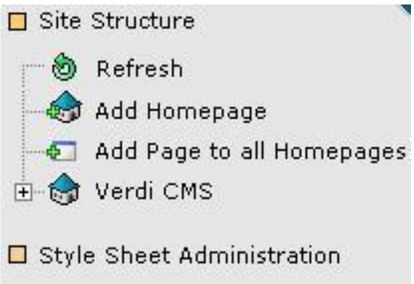
2 Site Structure Administration

The Site Structure Administration controls the pages (tiers) within Verdi. Pages can be created with a homepage (Tier 0) with up to three levels of associated sub-pages (Tiers 1-3).

2.1 Adding a Homepage

Verdi can have multiple homepages with associated tiers and sub-tiers. Each homepage can have a different set of associated tiers and sub-tiers with each area having their own graphical look and feel, giving the appearance of a separate site. This flexible tier model allows Verdi to effectively run an unlimited number of mini-sites all linked within the same main website.

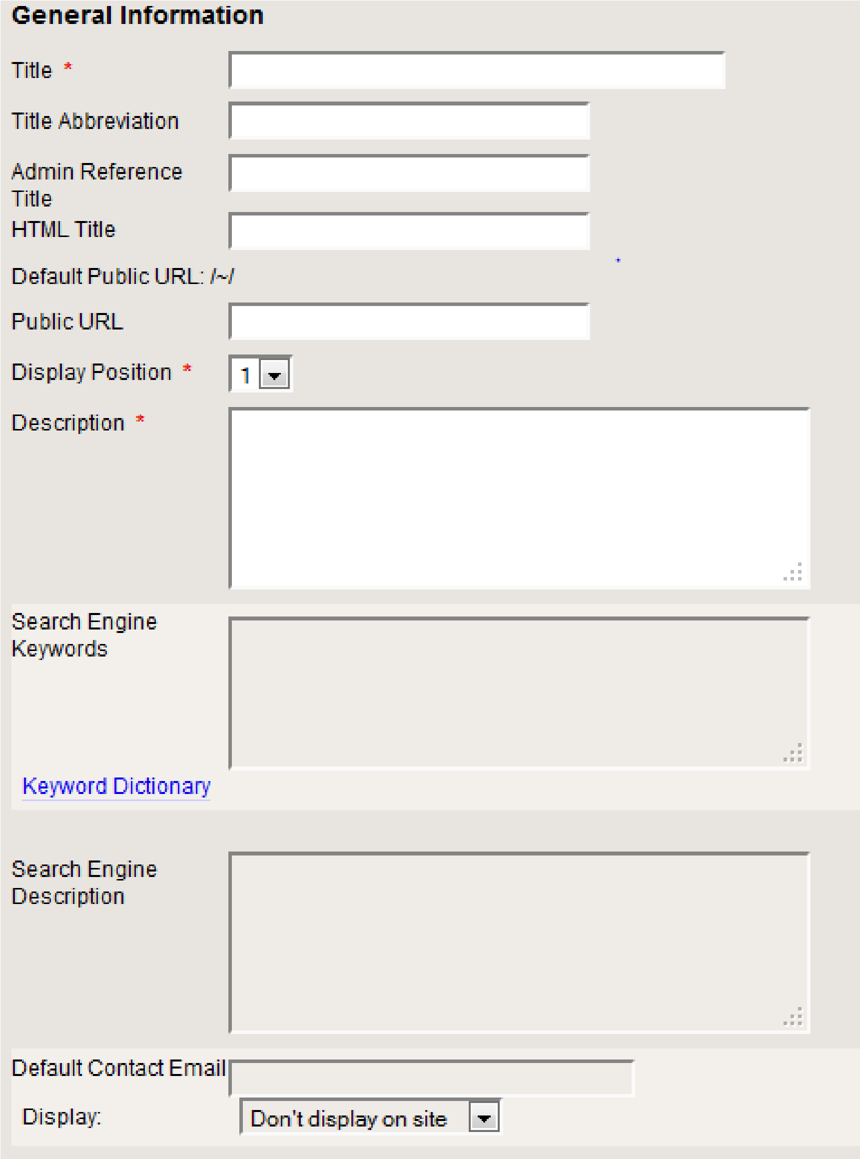
1. Click on the ***Site Structure*** option on the left navigation



> ***Note:*** *The Site Structure menu should open below the menu link*

2. Click on the ***Add Homepage*** link

> ***Note:*** *The Add a Homepage form, "General Information" should load*



Complete the form fields as follows: (asterisk '*' fields are mandatory)

3. Enter a new ***Title*** of your choice. This title is displayed in the title bar of the browser and is displayed by some modules, such as Site Search.
4. Enter a new ***Title Abbreviation*** of your choice. This abbreviation is displayed in the site navigation.
5. Add an ***Admin Reference Title*** which is displayed in the admin only.
6. Add an ***HTML Title*** to override the title displayed in the title bar of the browser
7. Add a ***Public URL***. This overrides the URL and allows users to create "Friendly URL's" for better SEO.

> ***Note:*** *HTML Title and Public URL are important for SEO. Leaving these fields blank will revert to the default options.*

8. The ***Display Position*** will default to the order in which the page was created, however it can be overridden to change the order in which the pages are displayed.
9. Enter a ***Description*** of the page. This description is used by search engines
10. Enter some ***Search Engine Keywords***. These keywords are common words or phases entered by users into search engines such as *Google* and who are searching for information or a website. A comma should separate each word. Alternatively, select keywords by clicking on the ***Keyword Dictionary*** option.
11. Enter a ***Search Engine Description*** (approx 25 words) for the homepage. This text will appear as part of the search results when users are searching for the site.

> ***Note:*** *Depending on your level of access within the Verdi Administration, you may need to contact your Site Administrator, should you need keywords added to the dictionary. See section 4*

for further information.

12. Enter a ***Default Contact Email*** for the site

> ***Note:*** *It is not required to enter a default email.*

> ***Note:*** *The Custom window should be below and will display specific fields for your site.*

13. The ***Custom Fields*** section allows you to adapt the style of that tier.

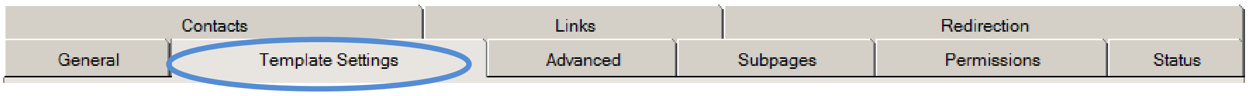
14. Set the ***Live Date***, which determines when the homepage will be displayed on the site
15. Set the ***Archive Date*** or check the ***Never Archive*** option (this is set by default), which determines when the homepage will be removed from the site
16. Set the ***Refresh Date***, which determines when an email notification will be sent to the designated page contact, to alert the user that the tier needs updating.

> ***Note:*** *If you do not want the page to be viewable until a date in the future then change the* ***Live Date*** *setting to the desired date.*

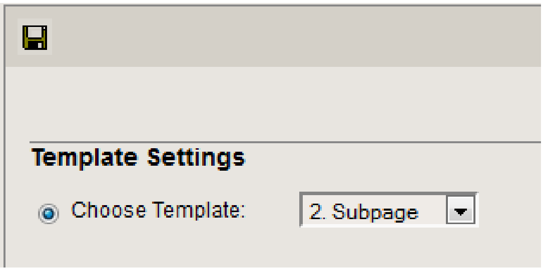
17. Select *"Yes* – Link in the Navigation Area" to ***Show in Navigation***
18. Ensure that the ***Enabled*** option is set to '*Yes – Display on Site'*
19. Click on the ***Save*** button to finish.

2.1.1 Template Settings Tab

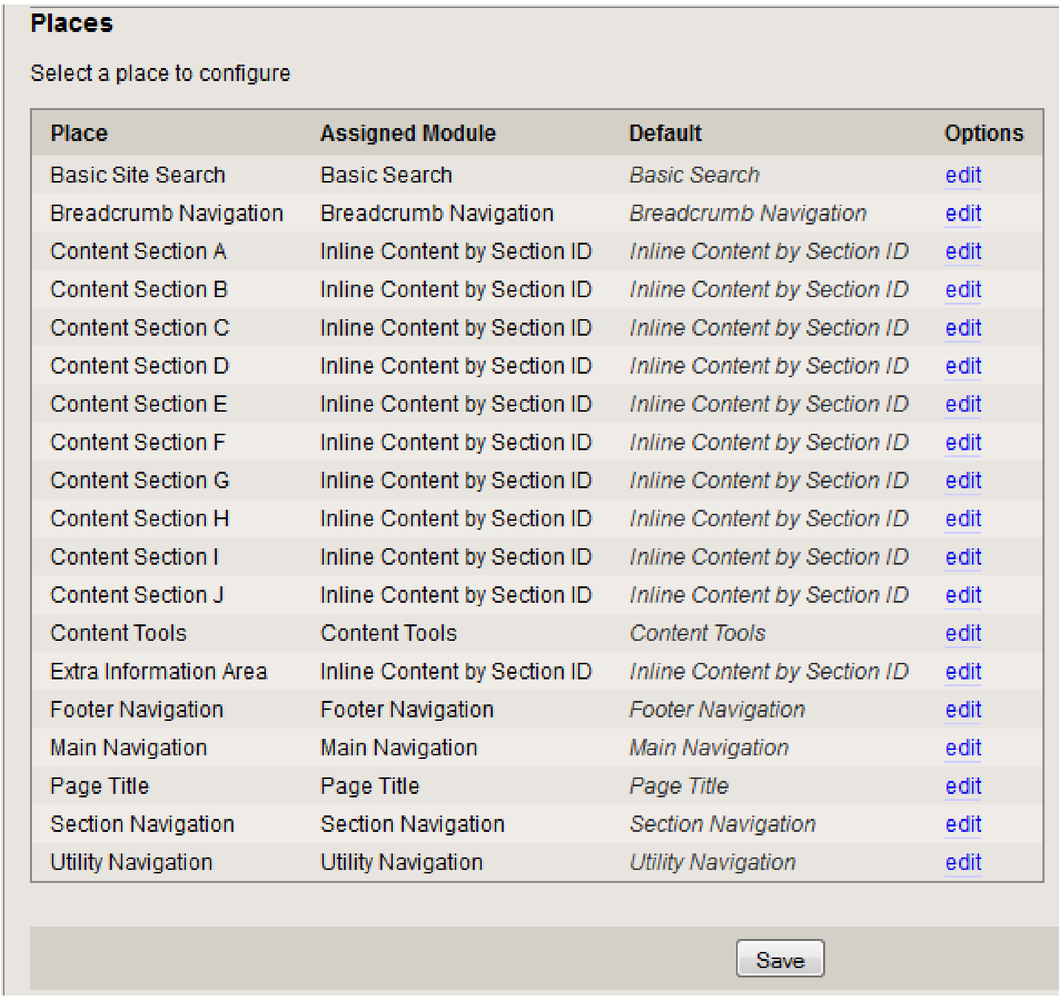
1. Click on the ***Template Settings*** tab at the top of the page.



2. Select ***2. Subpage*** from the ***Choose Template*** option.



3. Edit the individual Places to assign the desired Module to that Place by clicking on the ***edit*** link.



Place	Assigned Module	Default	Options
Basic Site Search	Basic Search	*Basic Search*	edit
Breadcrumb Navigation	Breadcrumb Navigation	*Breadcrumb Navigation*	edit
Content Section A	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section B	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section C	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section D	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section E	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section F	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section G	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section H	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section I	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section J	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Tools	Content Tools	*Content Tools*	edit
Extra Information Area	Inline Content by Section ID	*Inline Content by Section ID*	edit
Footer Navigation	Footer Navigation	*Footer Navigation*	edit
Main Navigation	Main Navigation	*Main Navigation*	edit
Page Title	Page Title	*Page Title*	edit
Section Navigation	Section Navigation	*Section Navigation*	edit
Utility Navigation	Utility Navigation	*Utility Navigation*	edit

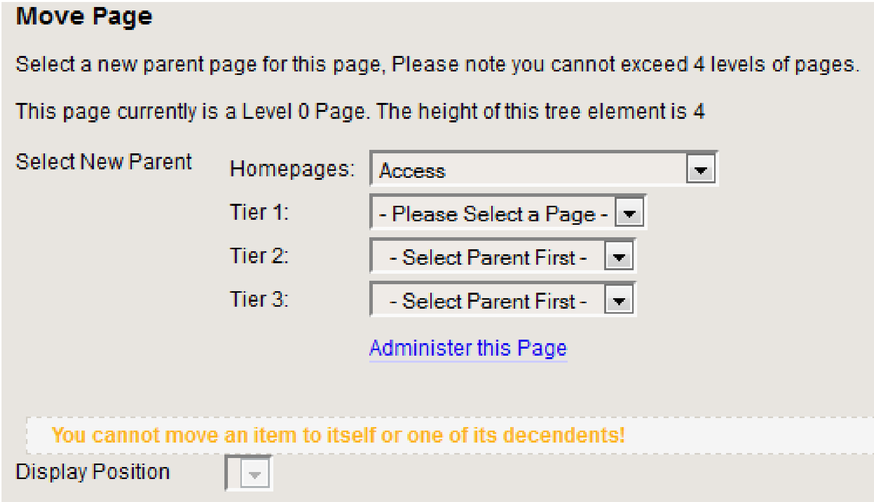
4. Scroll down and click the ***Save*** button to save the settings.

> ***Note:*** *The page can be saved by clicking the* **Save** *button or the* button at the top of the page.

2.1.2 Advanced Tab

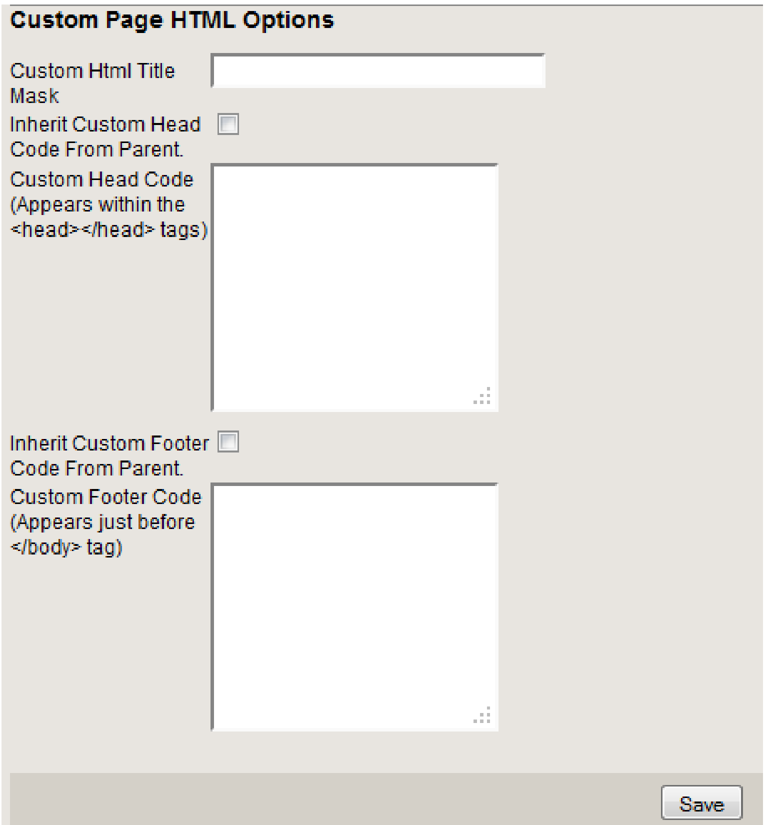
Click on the ***Advanced*** tab at the top of the page. This tab contains several options for the homepage, these include *Move Page, Custom Page HTML Options, Custom Stylesheets*, and *Interaction Options*.

Move Page



1. Using the ***Move Page*** drop down menu, select the parent page to move this page to and click the save button.

Custom Page HTML Options



1. Using the ***Custom Page HTML Options***, create a ***Custom HTML Title Mask*** to override the default page title.
2. Insert any ***Custom Head Code*** to insert HTML code within the <head></head> tags of the page or choose to ***Inherit the Custom Head Code*** from the parent by clicking in the tick box.
3. Insert any ***Custom Footer Code*** to insert HTML code before the </body> tag of the page or choose to ***Inherit the Custom Footer Code*** from the parent by clicking in the tick box.
4. Click save.

Stylesheets

1. Using the ***Style Option*** drop down menu, select an appropriate stylesheet for the homepage. The chosen stylesheet will determine the type of layout (look and feel) of the page.

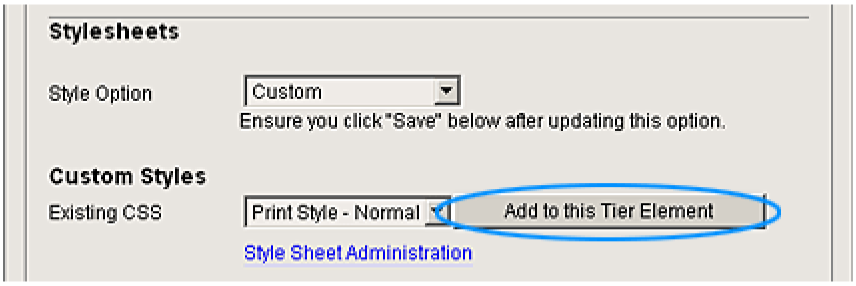
> ***Note:*** *If unsure of which style to choose leave the default option selected.*

> ***Tip:*** *You may also select Custom from the drop-down to use a custom stylesheet with the page.*

Selecting a Custom Stylesheet

1. From the ***Style Option*** drop-down select ***Custom*** and click on the ***Save*** button.

2. Select the desired stylesheet from the ***Existing CSS*** drop-down and click ***Add to this Tier Element*** button to add the stylesheet.

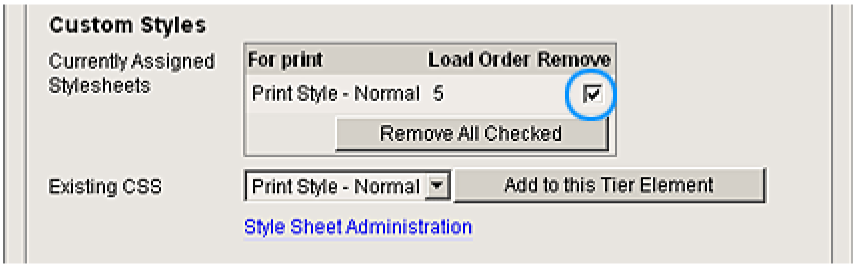


3. The selected stylesheet will be added to the current tier element.

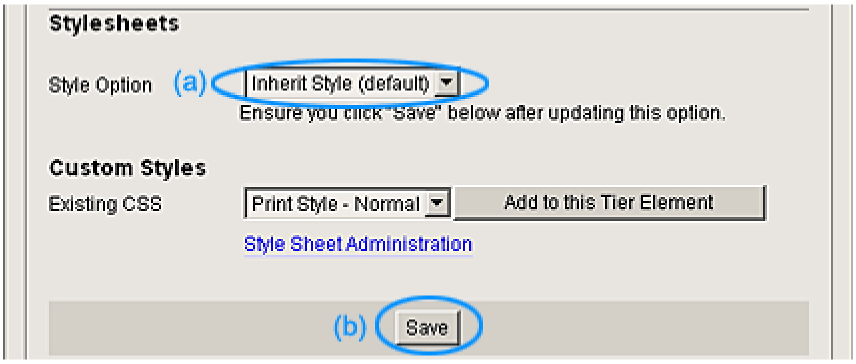
Removing a Custom Stylesheet

1. To remove a custom stylesheet, select the tier element that has a custom stylesheet set for it.
2. Click on the ***Advanced Tab***

3. In the ***Custom Styles*** section select the stylesheet that you would like to remove by checking the box.



4. Click ***Remove All Checked*** to remove the selected stylesheet.
5. Set the (a) ***Style Option*** to *Use default style sheet* and click (b) ***Save*** to finish.



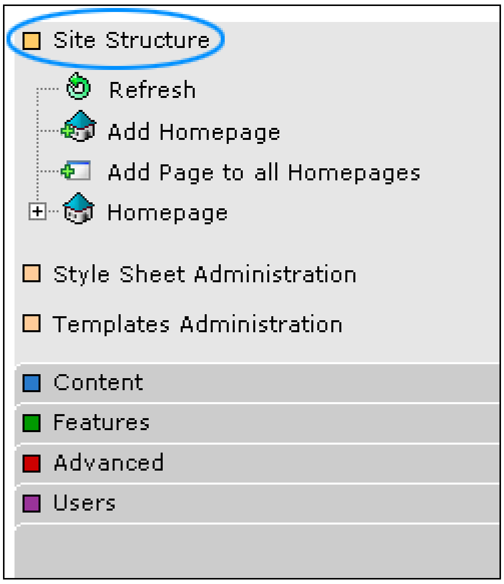
Note: *You are able to set custom stylesheets to more than one homepage as well as adding them to individual pages.*

Interaction Options

1. ***Site Map Display*** – If you do not want the homepage/page to show in the sitemap then set this option to "Don't display in sitemap". This option is set as default.
2. ***Searchability*** – This option is used to include/exclude the homepage/page from the search feature on the site. The default option is set to '*Exclude from site search'* so that anyone may view the page.
3. ***Access Restriction*** – If logon access is required to gain entry to the page then this option should be set to "Require logon for access". The default option is set to '*Unrestricted access'* so that anyone may view the page.
4. ***Secure Connection*** – This option will ascertain whether a secure connection is required to access the page.
5. ***External URL*** - Insert a website address here to link to an external site. (Note: Make sure the full address is entered eg. http://www.ibc.com.au)

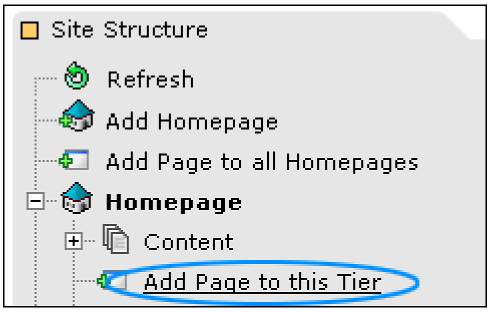
2.2 Adding a Page/Tier

1. Click on the ***Site Structure*** option on the left navigation

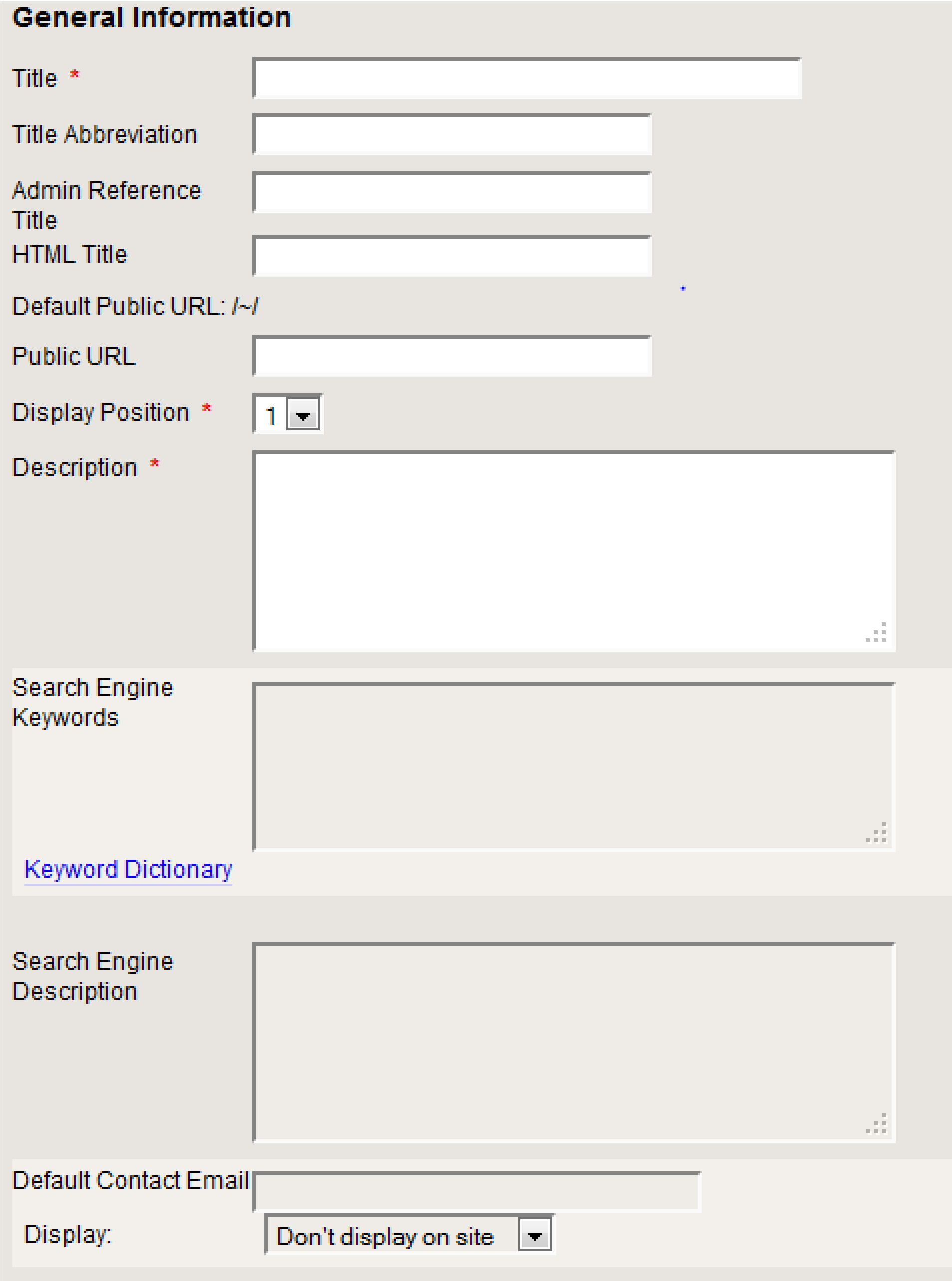


Note: *The Site Structure menu should open below the menu link*

2. Click '**+**' next to the homepage that you want to add the new sub tier to. Click on the ***Add Page to this Tier*** option



Note: *The Add a Page form, "General Information" will load*



Complete the form fields as follows: (asterisk '*' fields are mandatory)

1. Enter a new ***Title*** of your choice. This title is displayed in the title bar of the browser and is displayed by some modules, such as Site Search.
2. Enter a new ***Title Abbreviation*** of your choice. This abbreviation is displayed in the site navigation.
3. Add an ***Admin Reference Title*** which is displayed in the admin only.
4. Add an ***HTML Title*** to override the title displayed in the title bar of the browser
5. Add a ***Public URL***. This overrides the URL and allows users to create "Friendly URL's" for better SEO.

> ***Note:*** *HTML Title and Public URL are important for SEO. Leaving these fields blank will revert to the default options.*

6. The ***Display Position*** will default to the order in which the page was created, however it can be overridden to change the order in which the pages are displayed.
7. Enter a ***Description*** of the page. This description is used by search engines
8. Enter some ***Search Engine Keywords***. These keywords are common words or phases entered by users into search engines such as *Google* and who are searching for information or a website. A comma should separate each word. Alternatively, select keywords by clicking on the ***Keyword Dictionary*** option.

> ***Note:*** *Depending on your level of access within the Verdi Administration, you may need to contact your Site Administrator, should you need keywords added to the dictionary. See section 4 for further information.*

9. Enter a ***Default Contact Email*** for the site

> ***Note:*** *It is not required to enter a default email.*

> ***Note:*** *The Custom window should be below and will display specific fields for your site*

10. The ***Custom Fields*** section allows you to adapt the style of that tier

11. Set the ***Live Date***, which determines when the homepage will be displayed on the site
12. Set the ***Archive Date*** or check the ***Never Archive*** option (this is set by default), which determines when the homepage will be removed from the site
13. Set the ***Refresh Date***, which determines when an email notification will be sent to the designated page contact, to alert the user that the tier needs updating.

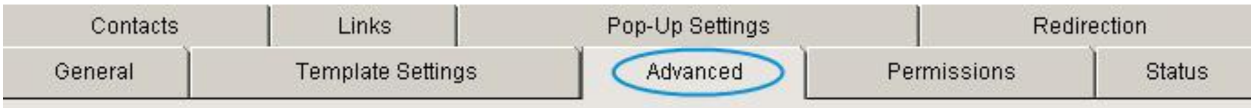
> ***Note:*** *If you do not want the page to be viewable until a date in the future then change the **Live Date** setting to the desired date.*

14. Select *"Yes – Link in the Navigation Area"* to ***Show in Navigation***
15. Ensure that the ***Enabled*** option is set to '*Yes – Display on Site'*
16. Click on the ***Save*** button to finish.

2.2.1 Template Settings Tab

The template settings for individual pages can be set up similarly to that of homepages (see *section 2.1.1* for the steps involved in setting up your template).

2.2.2 Advanced Tab



Move page

Pages can be moved to a different parent tier/page using this module. *(See section 2.1.2 for moving pages).*

Custom Page HTML Options

The Custom Page HTML Options allow users to enter additional code into sections of the page for search engine optimisation. These fields require some knowledge of HTML however IBC can provide guidelines. *(See section 2.1.2 for more information on Custom Page HTML Options).*

Stylesheets

Custom stylesheets can be set similarly to homepages for use with pages within in the site (see *sections 2.1.2 for adding and removing custom stylesheets*).

Homepages

See *section 2.9 Assigning a Page/Tier to a Homepage*.

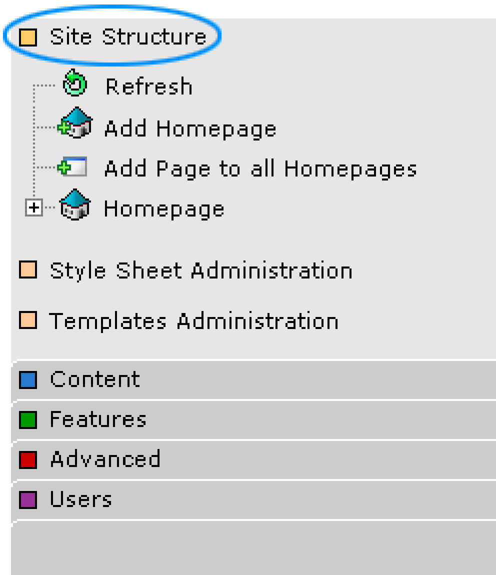
Interaction Options

See *section 2.1.2* for information regarding the *Interaction Options* available.

2.3 Adding a Utility Page

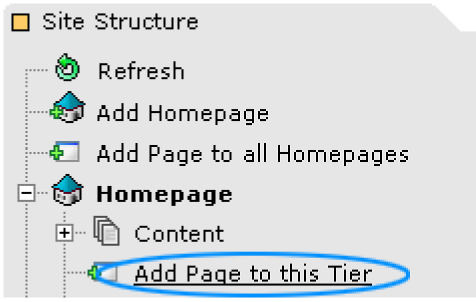
Utility pages are pages that may not fit within the general site structure (e.g. contact us, search, news, etc). Subsequently they need to be hidden from the navigation.

1. Click on the ***Site Structure*** option on the left navigation

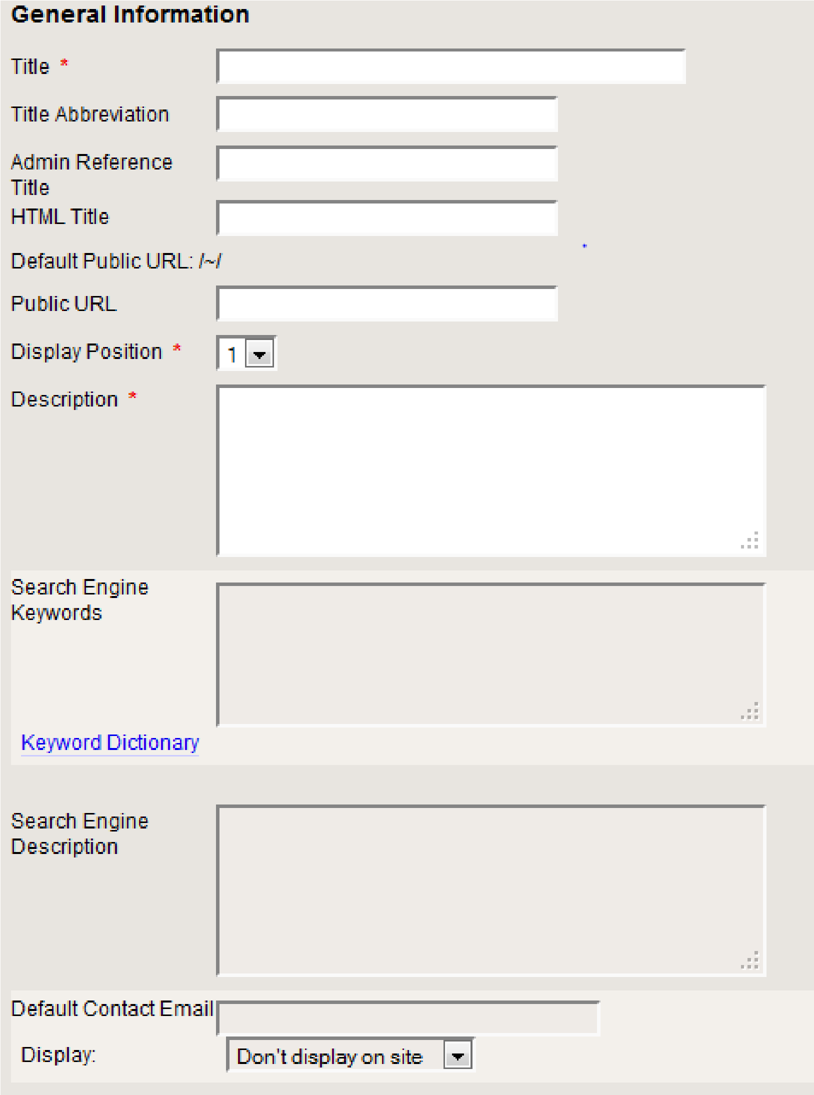


Note: *The Site Structure menu should open below the menu link (see below)*

2. Click '**+**' next to the homepage that you want to add the new sub tier to. Click on the ***Add Page to this Tier*** option



Note: *The Add a Page form, "General Information" will load (see over)*



Complete the form fields as follows: (asterisk '*' fields are mandatory)

3. Enter a new ***Title*** of your choice. This title is displayed in the title bar of the browser and is displayed by some modules, such as Site Search.
4. Enter a new ***Title Abbreviation*** of your choice. This abbreviation is displayed in the site navigation.
5. Add an ***Admin Reference Title*** which is displayed in the admin only.
6. Add an ***HTML Title*** to override the title displayed in the title bar of the browser
7. Add a ***Public URL***. This overrides the URL and allows users to create "Friendly URL's" for better SEO.

> ***Note:*** *HTML Title and Public URL are important for SEO. Leaving these fields blank will revert to the default options.*

8. The ***Display Position*** will default to the order in which the page was created, however it can be overridden to change the order in which the pages are displayed.
9. Enter a ***Description*** of the page. This description is used by search engines
10. Enter some ***Search Engine Keywords***. These keywords are common words or phases entered by users into search engines such as Google and who are searching for information or a website. A comma should separate each word. Alternatively, select keywords by clicking on the Keyword Dictionary option.
11. Enter a ***Search Engine Description*** (approx 25 words) for the homepage. This text will appear as part of the search results when users are searching for the site.

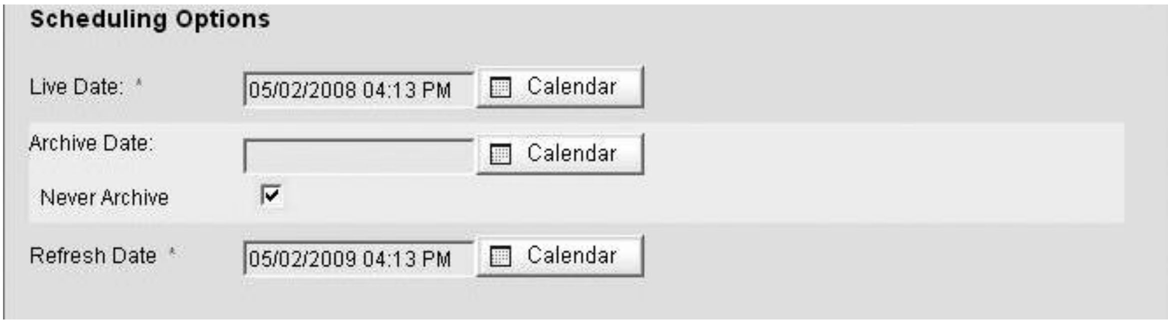
> **Note:** *Depending on your level of access within the Verdi Administration, you may need to contact your Site Administrator, should you need keywords added to the dictionary. See section 4 for further information.*

12. Enter a ***Default Contact Email*** for the site

> **Note:** *It is not required to enter a default email.*

> **Note:** *The Custom window should be below and will display specific fields for your site*

13. The ***Custom Fields*** section allows you to adapt the style of that tier.

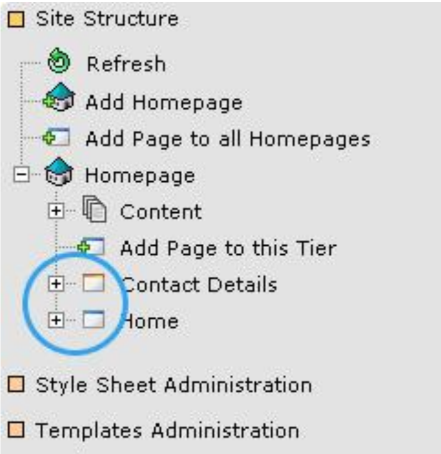


14. Set the ***Live Date***, which determines when the homepage will be displayed on the site
15. Set the ***Archive Date*** or check the ***Never Archive*** option (this is set by default), which determines when the homepage will be removed from the site
16. Set the ***Refresh Date***, which determines when an email notification will be sent to the designated page contact, to alert the user that the tier needs updating.

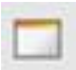
> **Note:** *If you do not want the page to be viewable until a date in the future then change the* ***Live Date*** *setting to the desired date.*

17. Ensure that the ***Show in Navigation*** option is set to "*No – Hide in Navigation*"

> **Note:** *To indicate that the page is hidden from the navigation the page/tier icon will appear orange in the site structure.*



Blue icon in tree structure denotes the page is 'Shown in Navigation.'



Orange icon in tree structure denotes the page is 'Hidden in Navigation.'

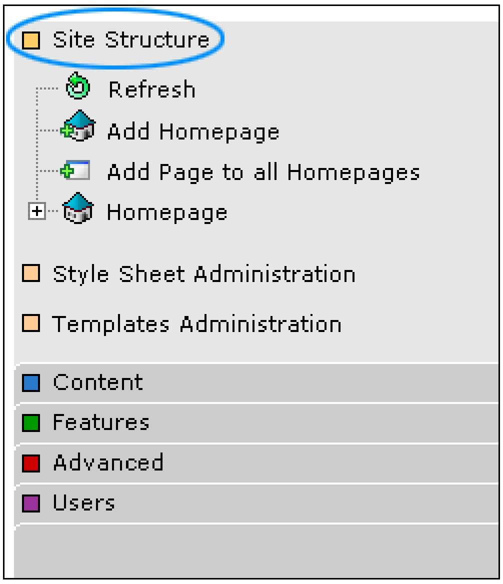
> ***Note:*** *To navigate to this page on the public site you will need to either create a Site Shortcut (see section Site Shortcuts) linking to the page or create a link within some the content.*

18. Ensure that the ***Enabled*** option is set to '*Yes – Display on Site'*
19. Click on the ***Save*** button to finish.

2.4 Adding a Page to all Homepages

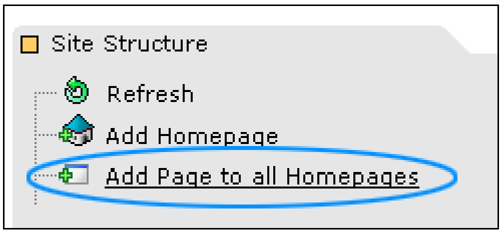
Pages/Tiers may be added to more than one homepage. These pages are commonly pages that may not be part of the general site navigation and are accessed through adding a site shortcut.

1. Click on the ***Site Structure*** option on the left navigation



Note: *The Site Structure menu should open below the menu link (see below)*

2. Click on the ***Add Page to all Homepages*** option



Note: *The Add a Page/Tier form will load. Follow instructions in section 2.2 for setting up the page/tier.*

2.5 Administering the Pop-up Window Settings of a Page

What is a Pop-Window?

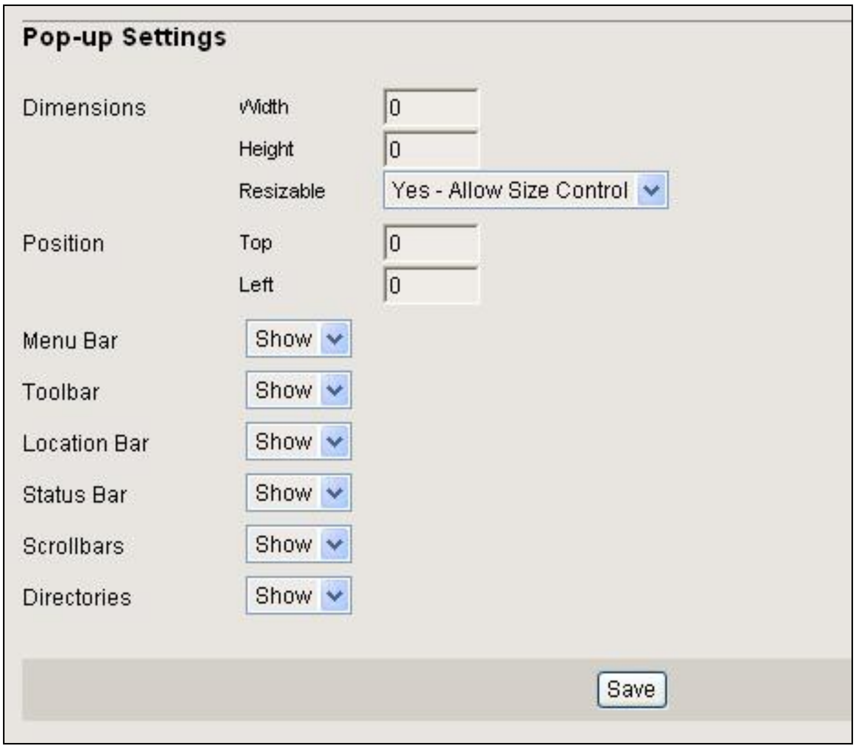
A pop up window is a small window that opens in a new browser screen above the screen you are currently using.

Verdi allows you to display certain pages within your site within a pop up window. The following steps describe what can be administered within this.

1. Click on the ***Pop-Up Settings*** tab

2. Select *Pop-Up Window* from the ***Tier Element Type*** drop-down menu and click the ***Save*** button

Note: *The Pop-up settings form will load so that you can administer the settings (see over).*



3. Complete the settings as follows:
   a. Enter a ***Width*** for the window in pixels. (A common size is 500 pixels.)
   b. Enter a ***Height*** for the window in pixels. (A common size is 500 pixels.)
   c. To allow users to resize the window once it is opened, set ***Resizable*** to '*Yes – Allow Size Control'.*
   d. Enter a ***Top*** position for the window to display. This figure determines how many pixels down from the top of the screen to display the window.

e. Enter a ***Left*** position for the window to display. This figure determines how many pixels from the left of the screen to display the window
f. If you would like to display a menu bar on the window, set ***Menu Bar*** to '*Show*'.
g. If you would like to display a toolbar on the window, set ***Toolbar*** to '*Show'.*
h. If you would like to display a location bar on the window, set ***Location Bar*** to '*Show*'.
i. To display a status bar on the window, set ***Status Bar*** to '*Show*'.
j. To display scrollbars on the window, set ***Scrollbars*** to '*Show*'.
k. To display the browser *Links* toolbar, set ***Directories*** to '*Show*

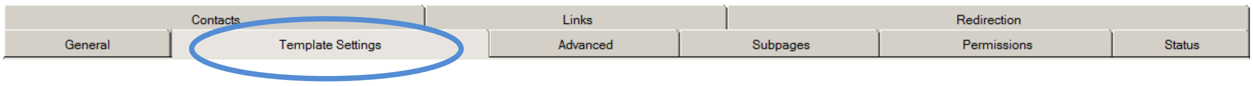
4. Click on the ***Save*** button to finish

2.6 Administering the Page/Tier Template

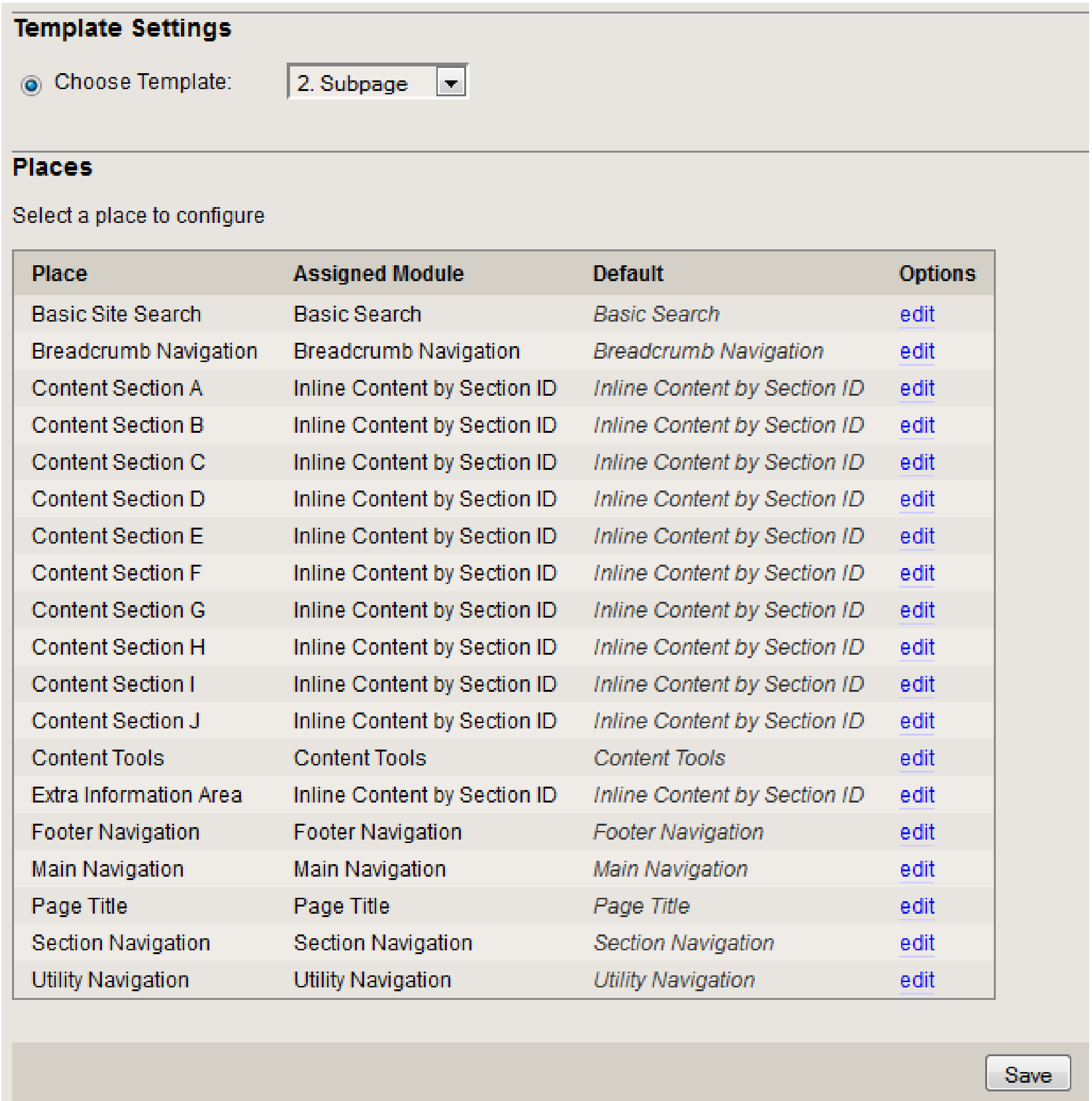
The tier template controls what is displayed and where on the page. Depending upon which template was selected for the page, determines which modules are available to select for each section of the page.

To administer the template settings select the homepage/page that you want to administer.

1. Click on the ***Template Settings*** tab.

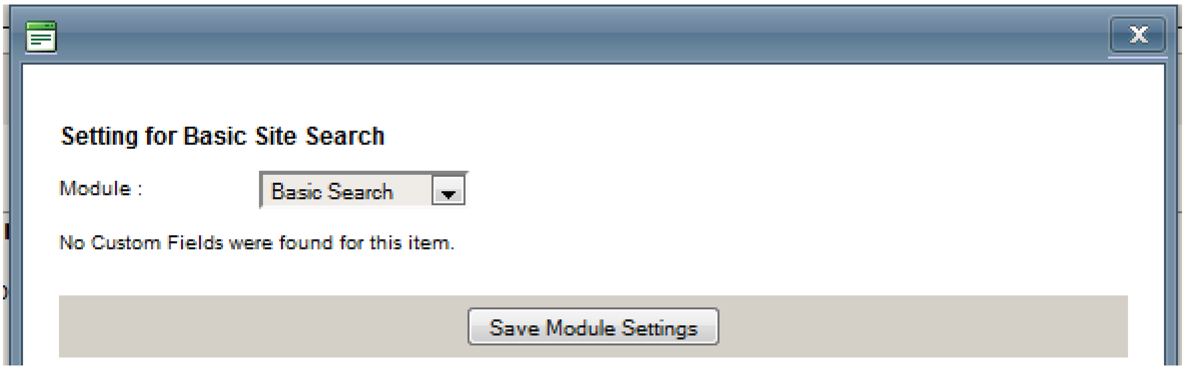


2. Select the desired template from the ***Choose Template*** option.



Place	Assigned Module	Default	Options
Basic Site Search	Basic Search	*Basic Search*	edit
Breadcrumb Navigation	Breadcrumb Navigation	*Breadcrumb Navigation*	edit
Content Section A	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section B	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section C	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section D	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section E	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section F	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section G	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section H	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section I	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Section J	Inline Content by Section ID	*Inline Content by Section ID*	edit
Content Tools	Content Tools	*Content Tools*	edit
Extra Information Area	Inline Content by Section ID	*Inline Content by Section ID*	edit
Footer Navigation	Footer Navigation	*Footer Navigation*	edit
Main Navigation	Main Navigation	*Main Navigation*	edit
Page Title	Page Title	*Page Title*	edit
Section Navigation	Section Navigation	*Section Navigation*	edit
Utility Navigation	Utility Navigation	*Utility Navigation*	edit

3. Follow the ***edit*** link on the ***Place*** that you want to edit



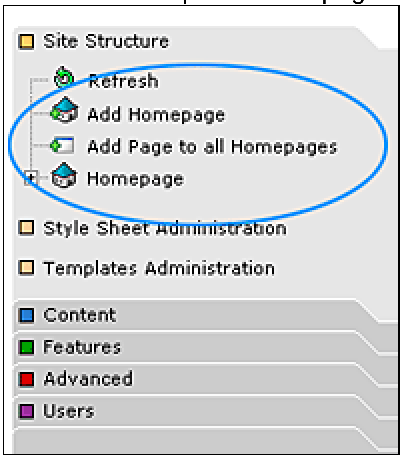
4. Choose the desired module from the drop-down list and click ***Save Module Settings***

> ***Note:*** *Only one module can be selected for each section of the page. The Default settings will load at first.*

5. Click the ***Save*** button to finish

2.7 Editing a Homepage or Page/Tier

1. Click on the required homepage or page/tier on the left navigation



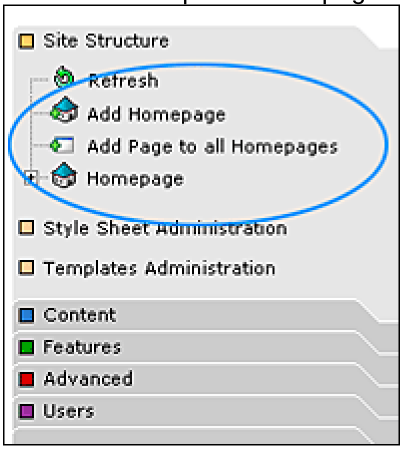
> ***Note:*** *If your page/tier is not displaying, click on the '+' next to the homepage on the navigation bar and the pages/tiers will display.*

2. Make any required changes

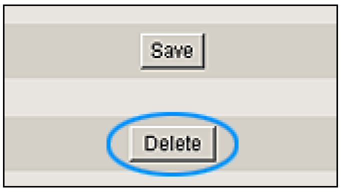
3. Click on the ***Save*** button to finish

2.8 Deleting a Homepage or Page/Tier

1. Click on the required homepage or page/tier on the left navigation



2. Scroll down and click on the ***Delete*** button.



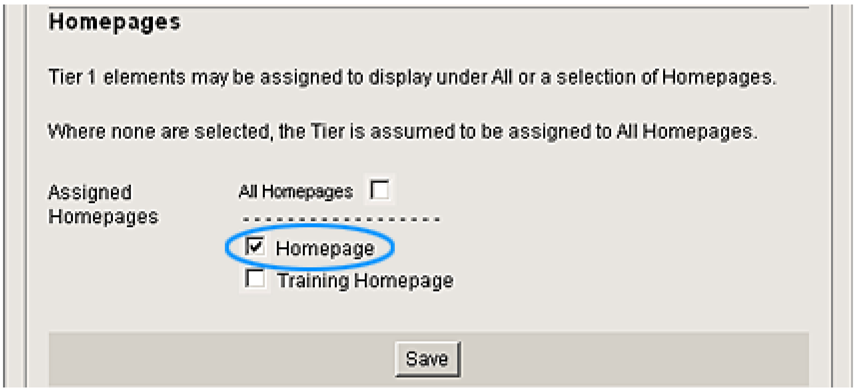
3. Click on the ***OK - Delete*** button to finish or click ***Cancel*** to stop the deletion.

2.9 Assigning a Page/Tier to a Homepage

A tier can be assigned to a particular homepage. Verdi can have many homepages, which act as mini-sites all within the main site. Assigning a tier to a particular homepage restricts the tier from appearing in the navigation for other areas of the site, other than when the assigned homepage is displayed.

1. Select the required tier and click on the ***Advanced*** tab.

2. Under the *Homepages* section use the ***Assigned Homepages*** checkboxes to choose which homepages the page will be assigned to.



> ***Note:*** *If you want the page to be assigned to all homepages then select the **All Homepages** checkbox.*

3. Click on the ***Save*** button to finish.

2.10 Deleting an Assigned Homepage

1. Edit the required tier and click on the ***Advanced*** tab.

2. Scroll to the *Homepages* section and uncheck the homepage(s) that you no longer want the page to be assigned to.

> ***Note:*** *The Homepage option will default will now revert to its default option and will be assigned to all homepages.*

3. Click on the ***Save*** button to finish.

2.11 Setting Page/Tier Redirection

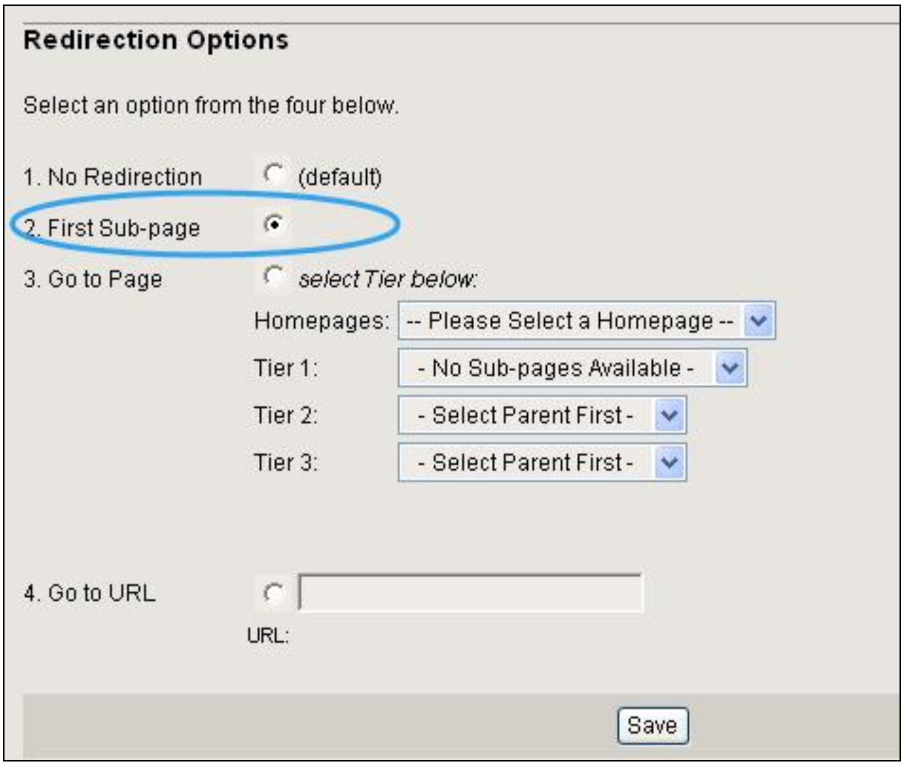
Tiers can be set to redirect to other internal pages or external websites whenever a user clicks the item within the navigation.

1. Select the required tier and click on the ***Redirection*** tab on the top navigation bar.

A number of redirection options are available. Only one redirection option can be chosen per tier.

2.11.1 Redirecting to First Sub-page

1. Click the ***First Sub-page*** option. This option will redirect the selected tier to the first available sub-tier.

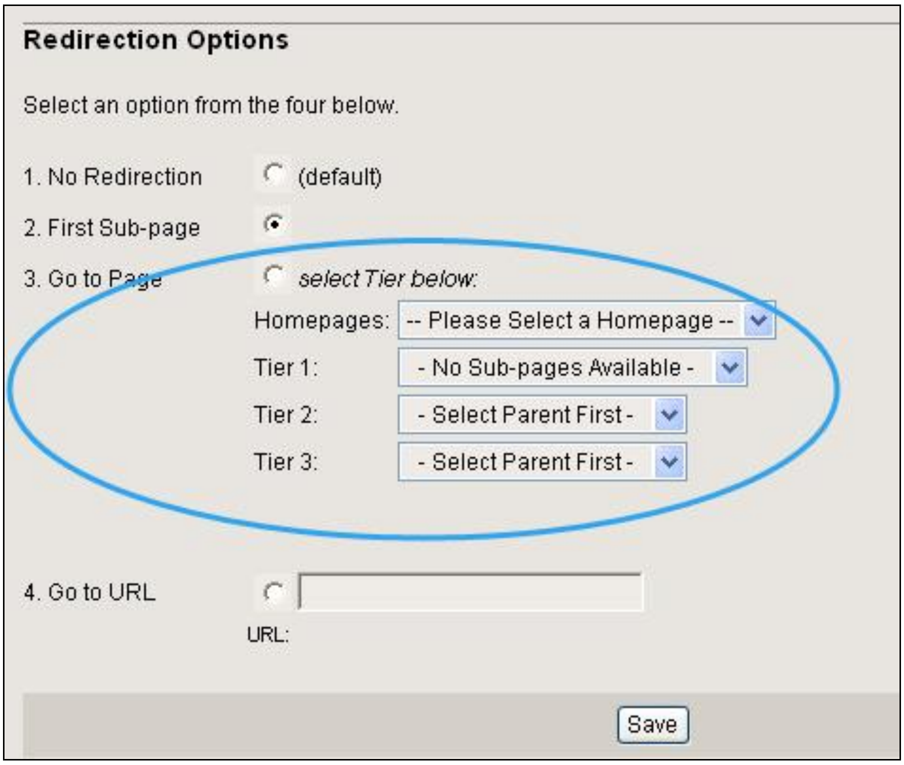


Note: *This option will redirect the selected tier to the first available sub-tier.*

2. Click on the ***Save*** button to finish

2.11.2 Redirecting to a specific page

1. Click on the ***Go to Page*** option.



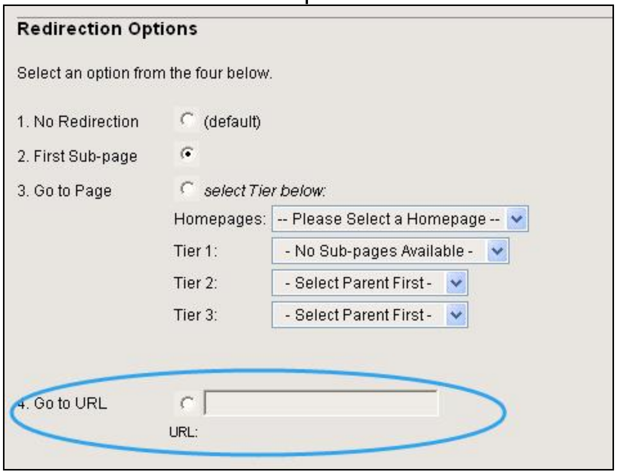
2. Select the page that you want to redirect to from the drop-down menus.

> ***Note:*** *This option is used to redirect the selected tier to another area within your site.*

3. Click on the ***Save*** button to finish.

2.11.3 Redirecting to an External URL

4. Click on the ***Go to URL*** option



5. Enter a website address in the ***URL*** text box.

> ***Note:*** *The URL must be in the following format:* ***http://www.websiteaddress.com***

6. Click on the ***Save*** button to finish

2.12 Administering Homepage and Page Permissions

What are Permissions?
Permissions are settings that can be applied to pages and content to control who can view or edit the content.

There are two types of permissions:
1. **Public Permissions:** Define the permissions for public users viewing content on the public site.
2. **Administration Permissions:** Define the permissions for administration users for managing and editing content in the administration site.

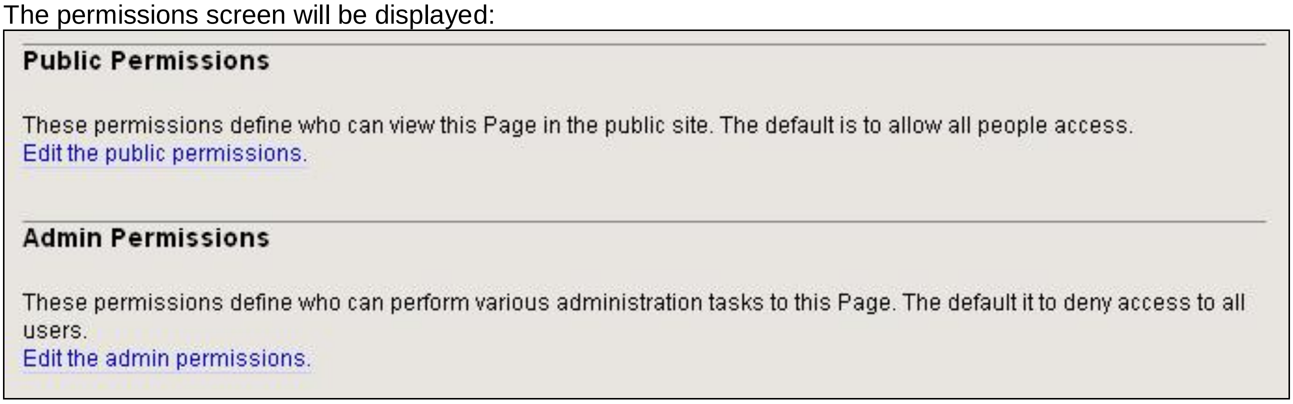
Within this, there are 3 ways Verdi can identify permission sources:
1. **IP Permissions:** Recognise a particular computer or networks IP address. Each machine connected to the Internet has an address known as an Internet Protocol address (IP address). The IP address takes the form of four numbers separated by dots, for example: 123.45.67.890
2. **User Permissions:** Recognises a particular user who logs into a site. (Predefined within the Users Administration area)
3. **Group Permissions:** Recognises a particular group of users who logs into a site. (Predefined within the Users Administration area)

Permissions can be control **allowing** content to be accessed or **denying** content to be accessed.

2.12.1 Accessing the Permission Area

1. Select the required tier and click on the ***Permissions*** tab on the top navigation bar.

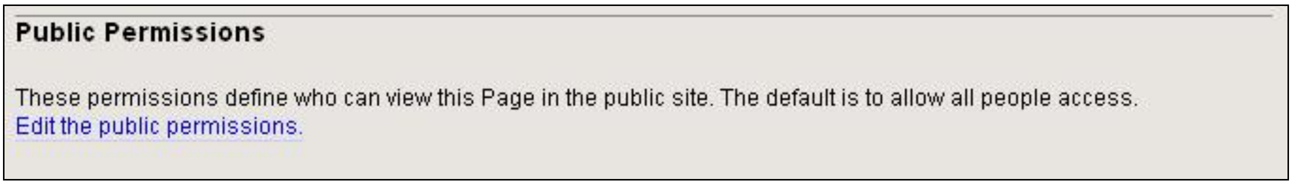
The permissions screen will be displayed:



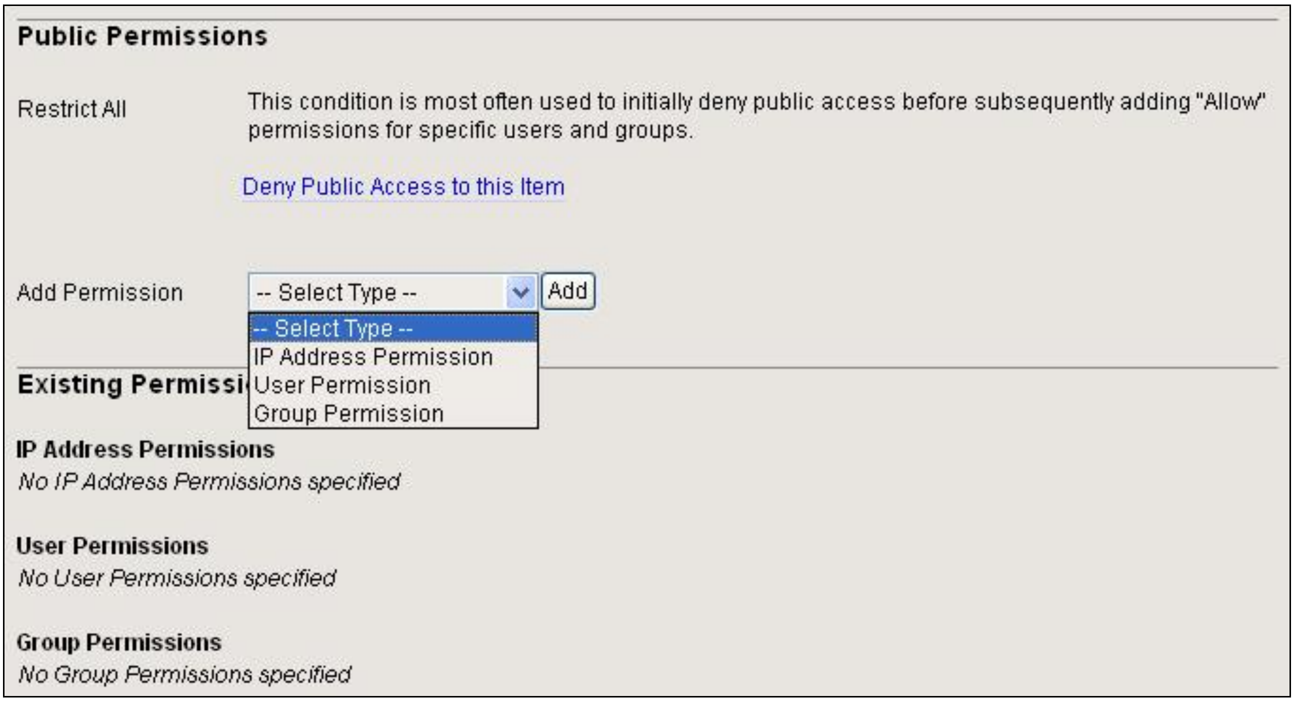
A number of permissions options are available once editing either the Public or Admin permissions.

2.12.2 Setting IP Address Permissions

1. Click on the ***Edit the Public Permissions*** link



> ***Note:*** *The Public Permissions page will load displaying options for administering public permissions for the page*



2. Select '*IP Address Permission'* from the ***Add Permission*** option, then click ***Add***

> ***Note:*** *The IP Permissions form will load*

3. Enter an ***IP Address*** in the text box provided

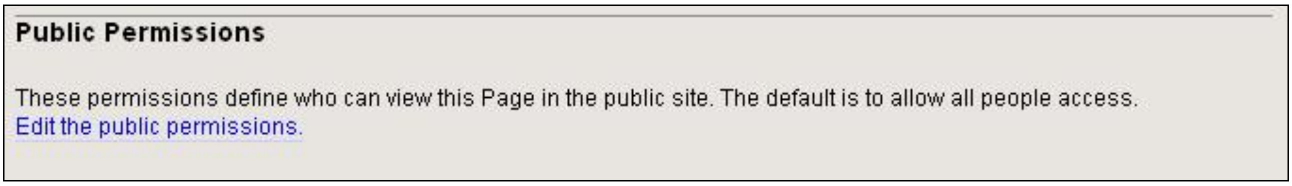
> ***Note:*** *The IP Address must be in the following number format:* ***xxx.xx.xx.xx***

4. Select to ***Allow or Deny*** the IP Address using the drop-down menu
   - *Allow will allow this IP address to have public permissions to view this page.*
   - *Deny will not allow this IP address to have public permissions to view this page.*

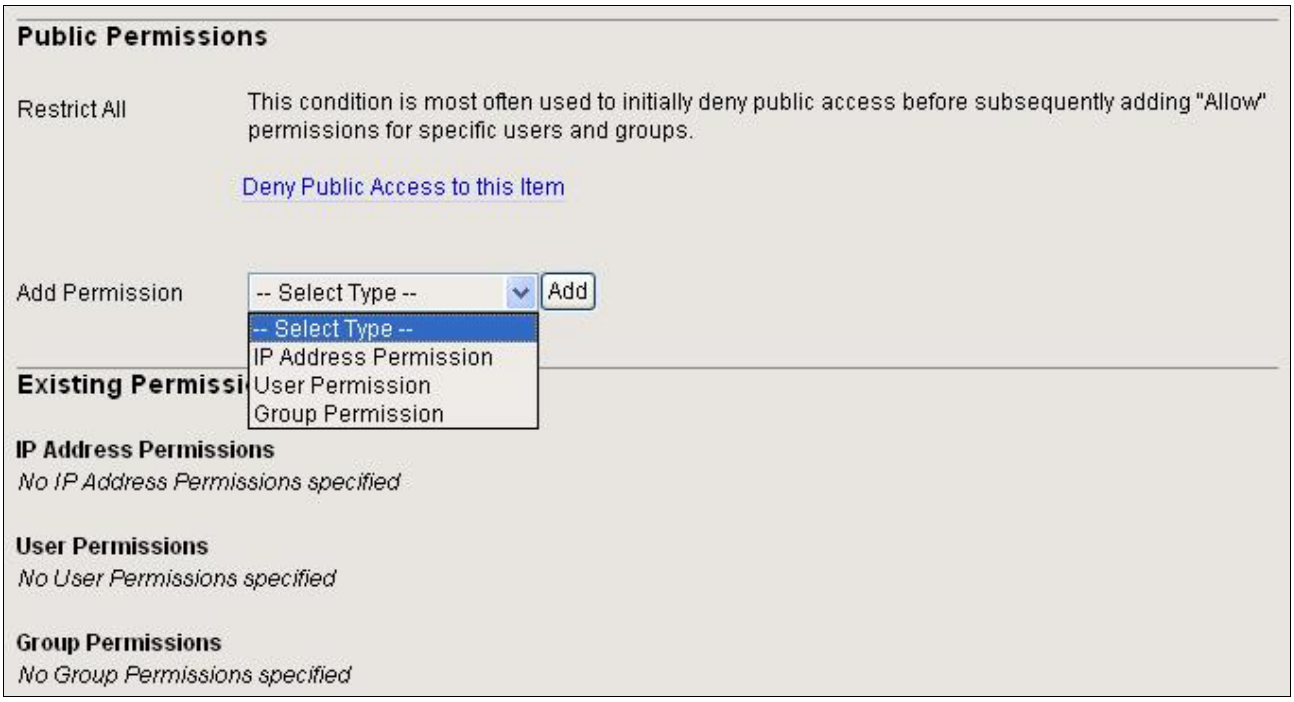
5. Click on the ***Save*** button to finish

2.12.3 Setting Public User Permissions

1. Click on the ***Edit the Public Permissions*** link



> ***Note:*** *The Public Permissions page will load displaying options for administering public permissions for the page*



2. Select '*User Permission'* from the ***Add Permission*** option, then click ***Add***

> ***Note:*** *The User Permissions form will load*

3. Select a ***User*** from the drop-down menu

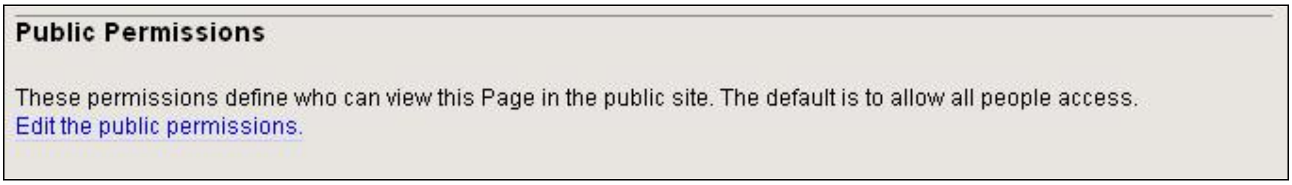
> ***Note:*** *Users are administered through the User Administration section. Depending upon your level of access, you may need to speak to your Site Administrator to have users added or removed from the list.*

4. Select to ***Allow or Deny*** the user from using the drop-down menu
   a. *Allow will allow the user to have public permissions to view this page.*
   b. *Deny will not allow the user to have public permissions to view this page.*

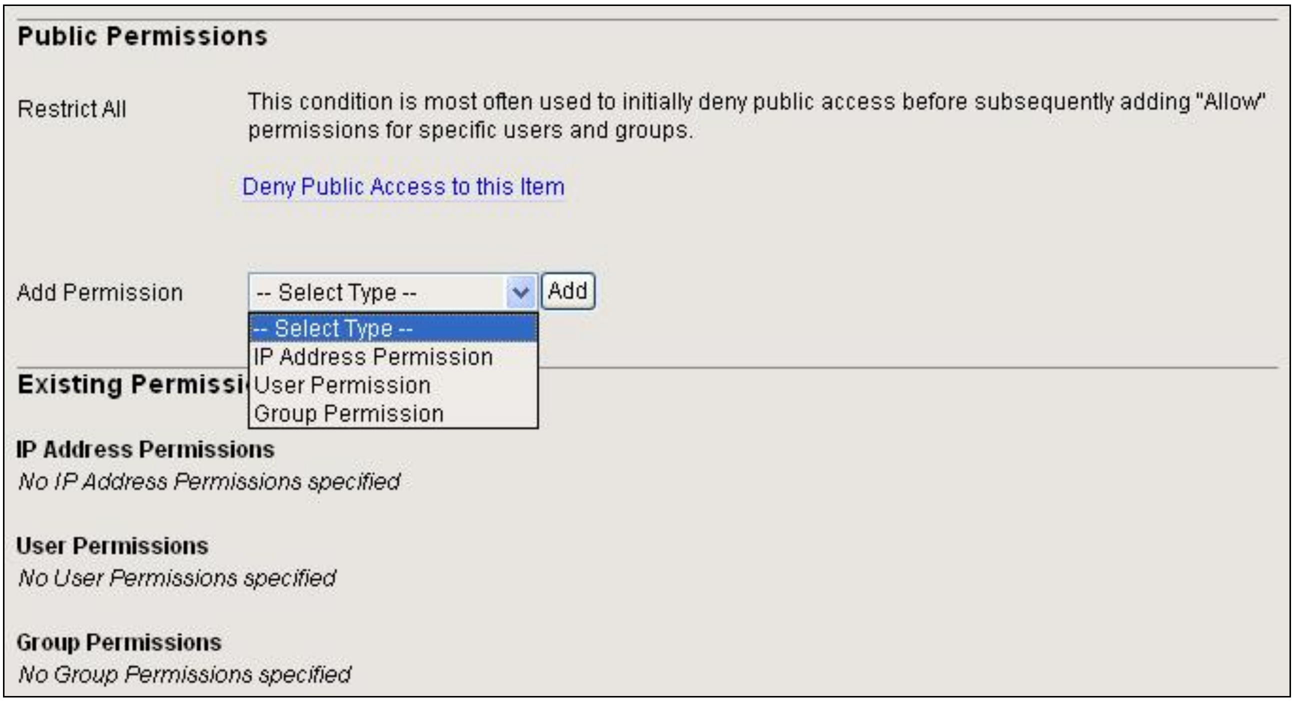
3. Click on the ***Save*** button to finish.

2.12.4 Setting Public Group Permissions

Click on the ***Edit the Public Permissions*** link



Note: *The Public Permissions page will load displaying options for administering public permissions for the page*



1. Select '*Group Permission'* from the ***Add Permission*** option, then click ***Add***

Note: *The Group Permissions form will load*

2. Select a ***Group*** from the drop-down menu

Note: *Groups are administered through the Users Administration section. Depending upon your level of access, you may need to speak to your Site Administrator to have groups added or removed from the list.*

3. Select to ***Allow or Deny*** the user from using the drop-down menu
4. Click on the ***Save*** button to finish.

2.13 Editing and Deleting Individual Permissions

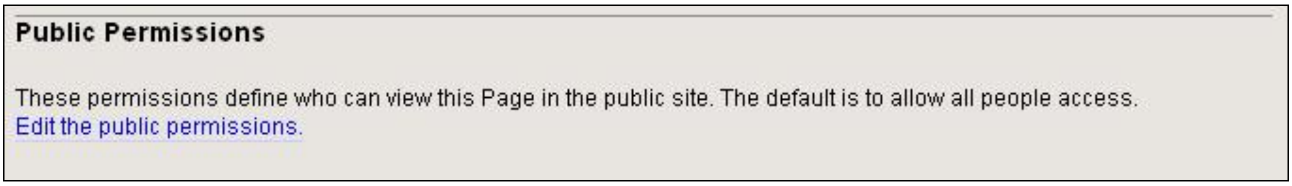
1. Edit the required tier and click on the ***Permissions*** tab on the top navigation bar.

Note: *The Permissions form will load*

2. Select which permissions you wish to remove or edit
   Options available:
   - Public Permissions
   - Admin Permissions

2.13.1 Editing and Deleting Public Permissions

1. Click on the ***Edit the public permissions*** link



Note: *The Public Permissions form will load.*

2. ***Edit Permission***

a. Click on the Permission link for the permission you wish to edit. (The hyperlinks)
b. The permission details will load.

c. Make any required changes.
d. Click the ***Save*** button to finish.

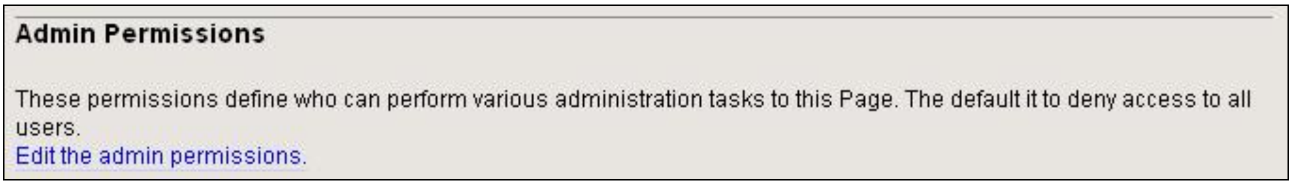
Alternatively, you can remove the permission(s).

3. ***Delete Permission***

a. Select the permission(s) you wish to remove by checking the ***Remove*** checkbox.
b. Click ***Remove All Checked*** to remove permissions as required.

2.13.2 Editing and Deleting Admin Permissions

1. Click on the ***Edit the admin permissions*** link



> ***Note:*** *The Admin Permissions form will load.*

2. ***Edit Permission***
   a. Click on the Permission link for the permission you wish to edit. (Select a Hyperlink)
   b. The permission details will load.

   c. Make any required changes.
   d. Click the ***Save*** button to finish.

   Alternatively, you can remove the permission(s).

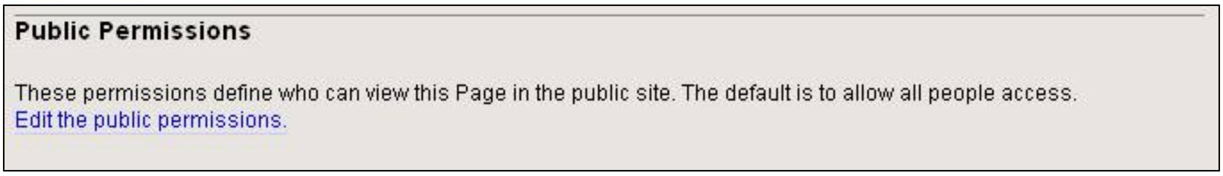
3. ***Delete Permission***

   c. Select the permission(s) you wish to remove by checking the ***Remove*** checkbox.
   d. Click ***Remove All Checked*** to finish

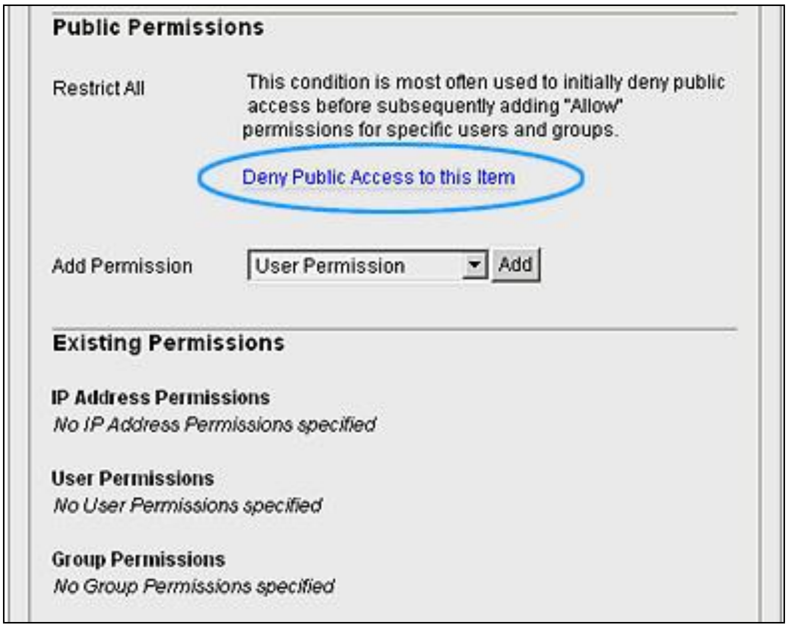
2.14 Restricting All Users

1. Edit the required tier and click on the ***Permissions*** tab on the top navigation bar.

2. Click on the ***Edit the Public Permissions*** link



Note: *The Public Permissions form will load*



3. Click on the ***Deny Public Access to this Item*** link

4. Click on the ***OK*** button to confirm or click on the ***Cancel*** button to stop the restriction
5. If ***OK*** is selected, the permissions page will show that all IP Addresses are blocked from access to the page (see below).

2.15 Setting Homepage and Tier Contacts

What are Contacts?

Contacts can be added to a particular page or content item to associate the content to a particular administration group or user. If required IBC programmers can display the users name or details on the public site. (For further information please contact [John Smith]) A primary and many secondary contacts can be attached to a single page or content item.

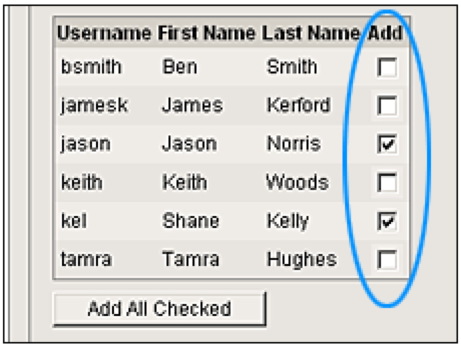
1. Click on the required tier and select the ***Contacts*** tab on the top navigation bar.

2. Select the group that you want to search for the contact in from the ***Group*** drop-down menu.

3. Enter any keyword(s) to search for

> ***Note:*** *If no keywords are entered then all users from the selected group will be displayed in the search results.*

4. Click the ***Search*** button.
5. From the results select the users that you want as contacts for the tier



6. Click on the ***Add All Checked*** button to add the selected users.
7. The users will be added to the ***Existing Contacts*** list for the tier.

8. To select the ***Primary Contact*** simply click on the Make Primary link next the appropriate user.

2.16 Editing Homepage and Tier Contacts

1. Edit the required tier and click on the ***Contacts*** tab on the top navigation bar.

Note: *The Existing Contacts form will load*

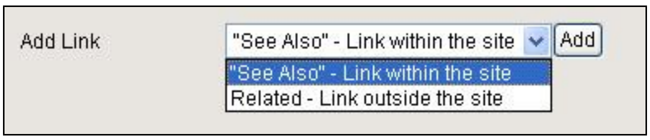
2. Change or remove page contacts as required by clicking on the checkboxes provided.
3. Scroll to the bottom of the form and click on the ***Remove All Checked*** button to finish

4. The ***Existing Contacts*** summary form will update and display your changes

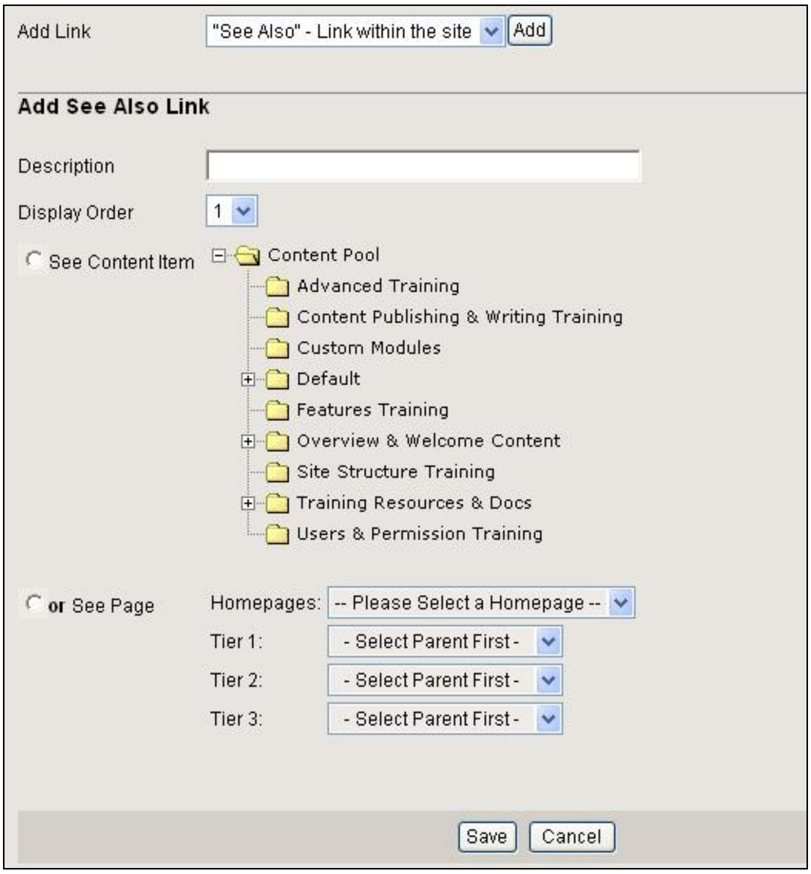
2.17 Adding Homepage and Tier 'See Also' Links

1. Edit the required tier and click on the ***Links*** tab on the top navigation bar.

2. Select '*See Also – Link within the site*' from the Add Link options and click the Add button.



Note: *The Add See Also Link form will load.*



3. Enter some text in the ***Description*** box for the link.
4. Use the ***Display Order*** drop-down menu to select the position in the list for the link.
5. Choose **one** of the following options:
   a. Click on the ***See Content Item*** option to link to a Content Pool Item, rather than to a tier, or
   b. Use the ***See Page*** drop-down menus to link to another tier
6. Click on the ***Save button*** to finish

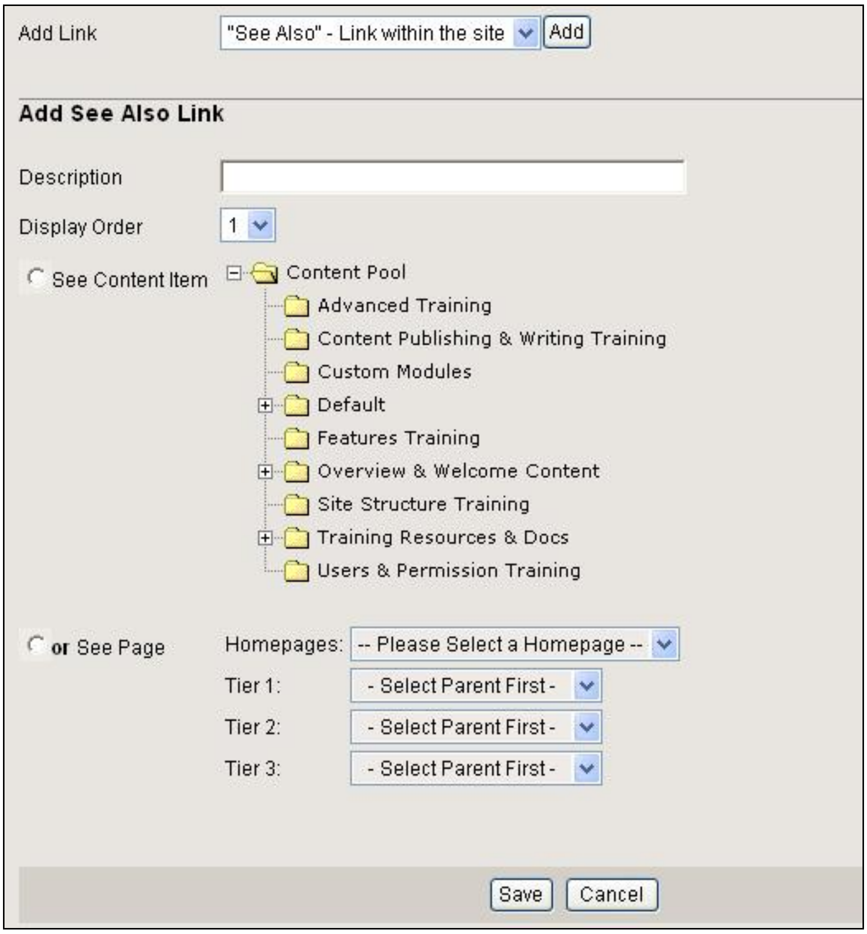
> ***Note:*** *The links tab will be updated with the link that you just added.*

2.18 Editing Homepage and Tier "See Also" Links

1. Select the required tier and click on the ***See Also Links*** tab on the top navigation bar.

2. Click on the link that you want to edit.

3. Make any required changes



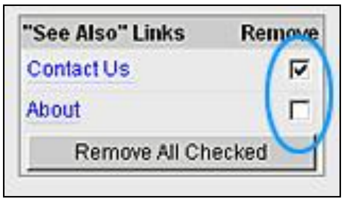
4. Click on the ***Save*** button to finish

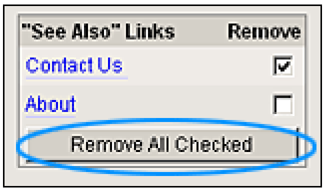
2.19 Deleting Homepage and Tier "See Also" Links

1. Edit the required tier and click on the ***Links*** tab on the top navigation bar.

Note: *A new popup window will open allowing you to delete specific links*

2. Select the links that you would like to remove. Click on the ***Remove All Checked*** button to confirm the removal of the selected link(s).



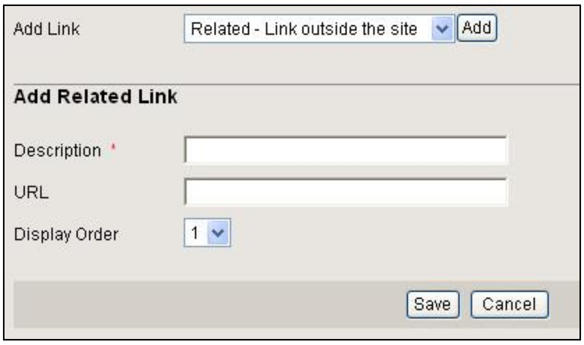


2.20 Adding Homepage and Tier 'Related' Links

1. Edit the required tier and click on the ***Links*** tab on the top navigation bar.

2. Select 'Related – *Link outside the site*' from the ***Add Link*** options and click the ***Add*** button.

Note: *The Add Related Link form will load.*



3. Enter some text in the ***Description*** box for the link.
4. Enter an external website address in the ***URL*** text box

Note: *The URL must be in the following format:* ***http://www.websiteaddress.com***

5. Use the ***Display Order*** drop-down menu to select the position in the list for the link
6. Click on the ***Save button*** to finish

Note: *The links tab will be updated with the link that you just added.*

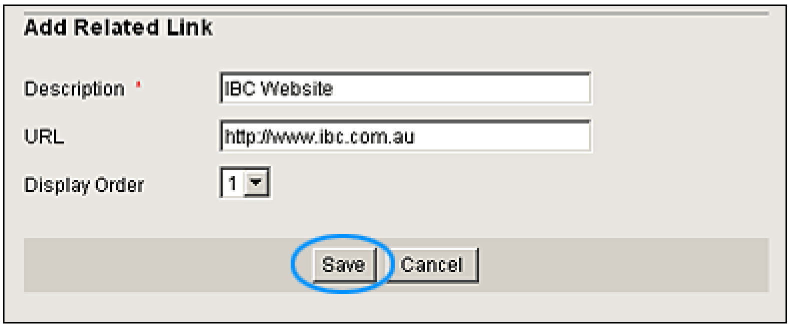
2.21 Editing Homepage and Tier 'Related Links'

1. Edit the required tier and click on the ***Links*** tab on the top navigation bar.

2. Click on the related link that you want to edit

Note: *A new popup window will open allowing you to edit specific links*

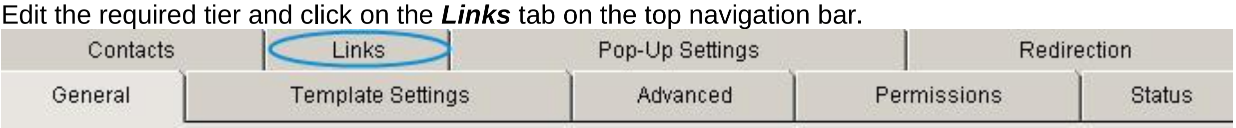
3. Make any required changes to the link



4. Click on the ***Save*** button to finish

2.22 Deleting Single Homepage and Page 'Related Links'

1. Edit the required tier and click on the ***Links*** tab on the top navigation bar.



2. Select the links that you want to remove by ticking the remove checkbox.

3. Click on the ***Remove All Checked*** button to confirm deletion

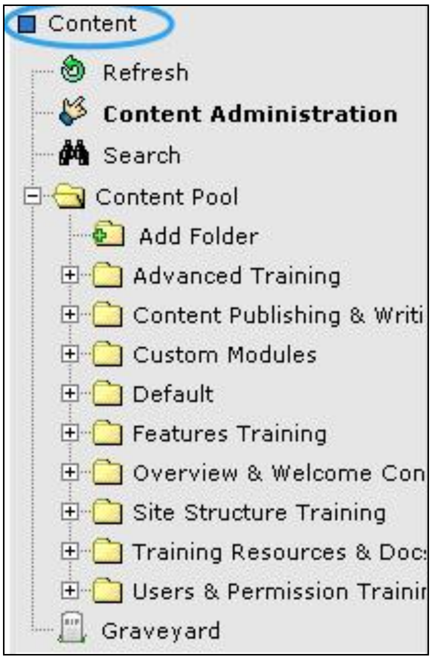
3 Creating and Managing Content

3.1 Creating a New Content Pool Item Using the Content Administration

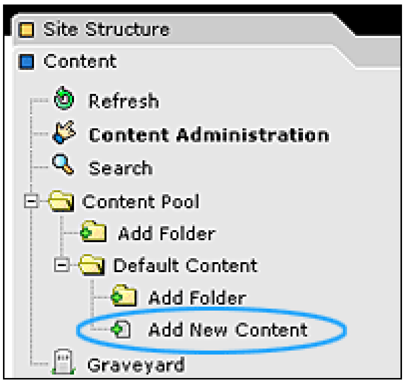
Why use the Content Administration area to create a content pool item?

By creating content pool items within the Content area you can leave the location free until you know where the content will be located. You can then manually add the locations of the content pool items. Whereas, creating a new content pool item within the Site Structure area will automatically apply the location of the content item.

1. Click on the ***Content*** option on the left navigation bar

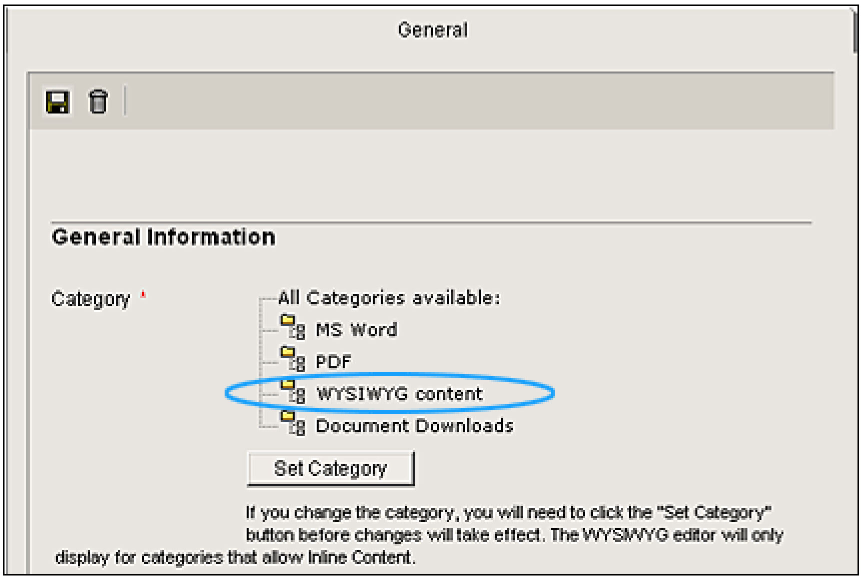


2. Click on the '**+**' symbol next to the ***Default Content*** folder
3. Click on the ***Add New Content*** link.

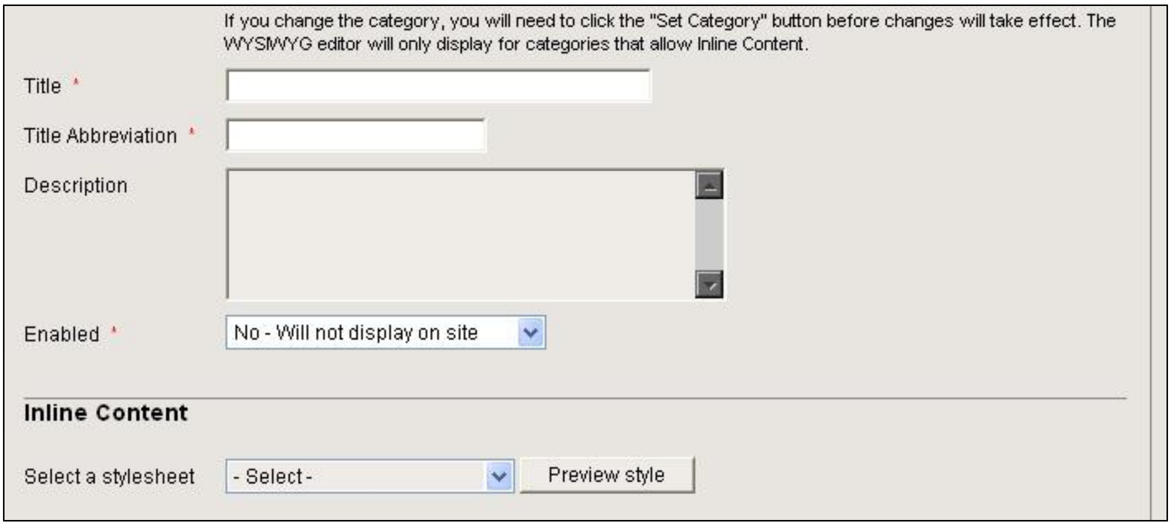


> ***Note**: The **General Information** form should load in the right-hand side pane.*

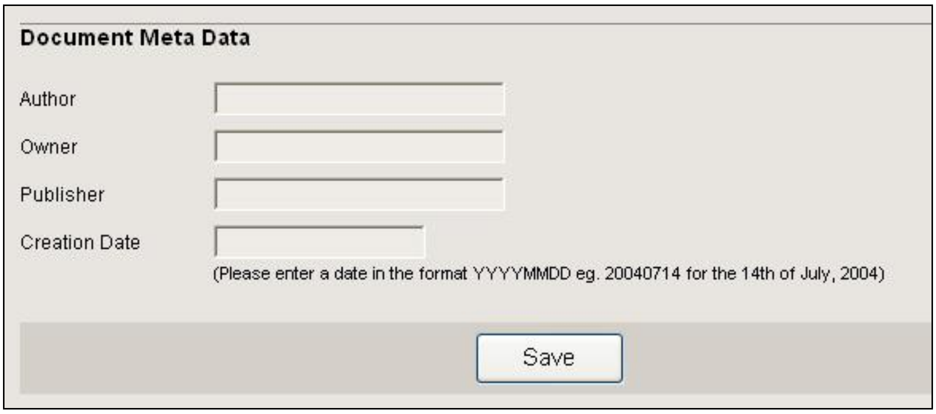
4. Click on WYSIWYG Content link to select the ***Content Category*** and click on the ***Set Category*** button



> ***Note***: The ***WYSIWYG editor*** should load in the lower section of the page once you have set the content category.
>
> **See the WYSIWYG User Manual for further information.**



5. Enter a ***Title*** for your content pool item in the box provided – this should be something that relates to the document or the content that you are going to add.
6. Enter the ***Title Abbrev*** to appear in the site navigation menu in the box provided. (May be the same.)
7. **Select "*Yes – Can be displayed on site*" from the *Enabled* drop down list**
8. The WYSIWYG area is displayed
9. Scroll down to the ***Document Metadata*** section



10. Enter the authors name in the ***Author*** text box.
11. Enter your full name in the ***Owner*** text boxes.
12. Enter the publishers name in the ***Publisher*** text box.

> ***Note**: The details that you enter into the Author, Owner and Publishers can all be your name. However, depending on your user privileges you may not be able to make the content live on your site. This action will require a publisher.*

13. Click on the ***Save*** button to finish.

You have now created a Content Pool Item. The next stage is to add content to the Content Pool Item

3.2 Adding Content Using the WYSIWYG Editor

What does WYSIWYG stand for?

WYSIWYG stands for **W**hat **Y**ou **S**ee **I**s **W**hat **Y**ou **G**et. Verdi incorporates a WYSIWYG Rich Text Editor which allows you write your content in an editor that is similar to using MS Word. The WYSIWYG editor generates HTML markup, but displays the formatting of the content in the administration area while you create it.

What is Inline Content?

Inline content is the name of the type of content that is written within the WYSIWYG Rich Text Editor. The templates that have been set up by IBC will use the term "Inline Content."

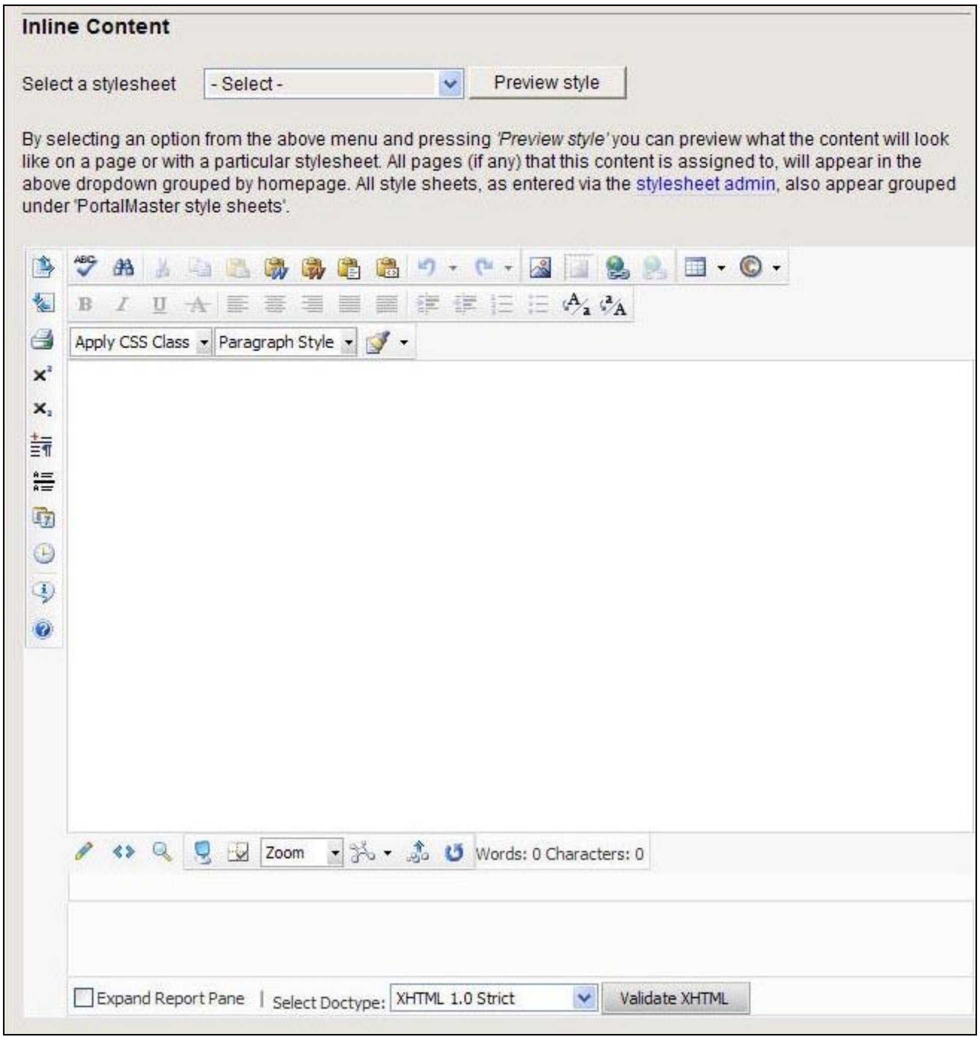
Note: *Your Site Administrator may have added a new content type for HTML content.*

Select the content pool item that you wish to add WYSIWYG content to.

1. Ensure that the WYSIWYG category is selected (WYSIWYG Content should always be set as default)

2. Enter the content ***Title*** and ***Title Abbreviation.***
3. Enter a ***description*** for the content item.
4. Select Yes or No Enable site

5. Scroll down to the WYSIWYG editor.



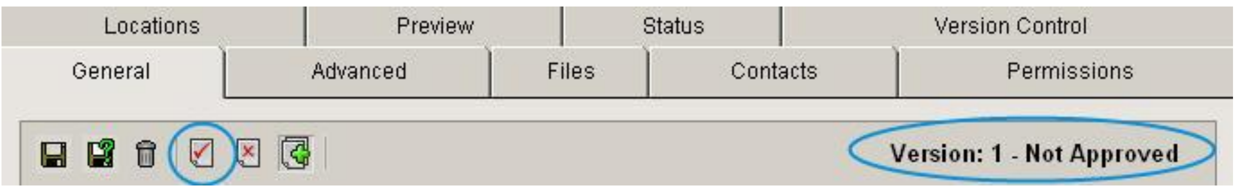
6. Enter your web page text, adding images and links as required (refer to the WYSIWYG Editor User Guide for further reference)
7. When you have completed your copy, click the ***Update*** button.

> ***Note****: Your content will be saved to the current content pool item.*
> *To add other files types please refer to section 3.3.*

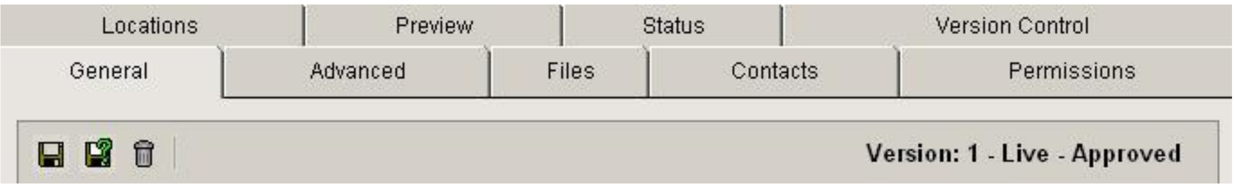
> ***Note****: At the top of the section, you will notice the system gives you the version number and the status of the content pool item. If the status is* ***Not Approved*** *then the document will require approving/publishing so that it can be viewed on the public site.*

IMPORTANT NOTE: Your content will not be live yet. The content needs to be Approved and have a location (page/ tier) to be published to.

8. To make the content live click on the ***Publish Content*** button.



9. Once published the content pool item status will change to Live and the Publish Content button will no longer appear.



> ***Note**: Depending on user privileges you may not be able to publish the document to the public site. In order to do this a user must be a Content Publisher or Site Administrator.*

3.3 Adding Other File Types to a Content Pool Item

Content items, such as Word documents, PDF files or HTML documents, which have been created outside of the Verdi CMS, can be imported and added to a Content Pool Item.

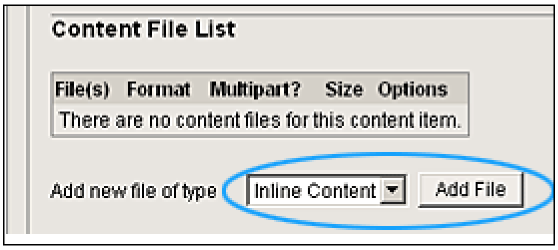
***Note**: The Content Formats that users are allowed to upload must be created first within the Content Formats Administration. See section 2 for further details*

1. Click on the ***Files*** tab on the top navigation bar.

***Note:** The Content File List form should load*

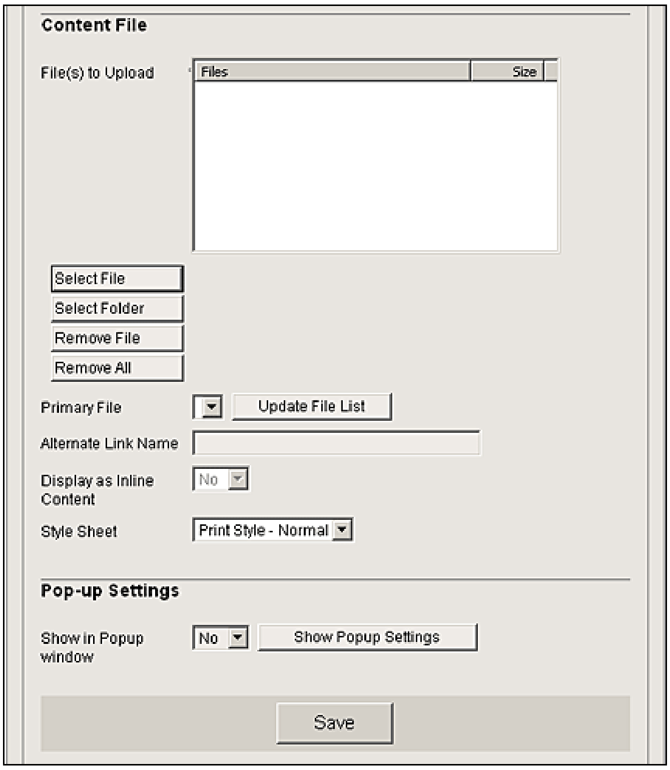
2. From the ***Add new file of type*** box, select a content type and click on the ***Add File*** button.

***Note:** The content types within the drop-down menu are administered within the Content Formats Administration section. See section 8 for further details*

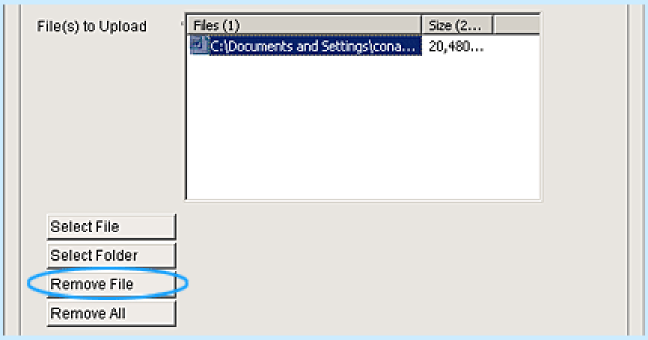


***Note**: The Content File form will load*

3. Click on the ***Select File*** button to select files to include



4. Browse your local and network drive for files.

> ***Note***: If you would like to remove files from your selection, click on the file in the list box and click on the ***Remove File*** button
>
> 
>

4. If you have imported a number of files, click on the ***Update File List*** button and use the ***Primary File*** drop-down menu to select the first file to be listed.
5. Enter an ***Alternate Link Name*** for the Content Pool Item. This name is used by document related modules and displays the alternate name entered instead of the filename.
6. If you have created links to other Content Pool Items within your content and would like to display the links in a new pop-up window, select '*Yes*' to ***Show in Popup Window*** and click on the ***Administer Pop-up Settings*** option.

> ***Note**: The Content Pop-up Settings window will open, allowing you to administer the show Pop-up Settings button. See section 2.5 for help with pop-up settings.*

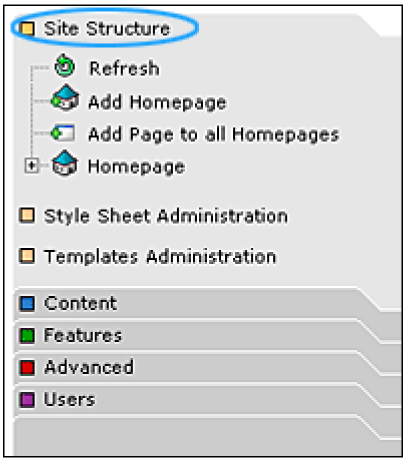
7. Click on the ***Save*** button to finish

3.4 Creating a New Content Pool Item Using the Structure Administration

Why use the Site Structure area to create a content pool item?

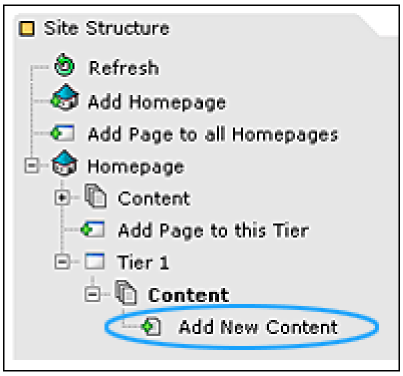
Creating a new content pool item within the Site Structure area automatically inserts the location of the content item. Whereas, when you create content pool items within the Content area you can leave the location free until you know where the content will be located and then manually add the locations.

1. Click on the ***Site Structure*** option on the left navigation



> ***Note:*** *The Site Structure menu should open below the menu link (see below)*

2. Using the side navigation, drill-down until you find the homepage or tier you would like to add content to.
3. Click on the '**+**' sign next to the homepage or tier.
4. Click on the '**+**' sign next to the ***Content*** menu option
5. Click on the ***Add New Content*** option



> ***Note:*** *The Select Content Type form will load. See section 3.2 for further instructions on administering content*

3.5 Previewing Newly Created Inline Content

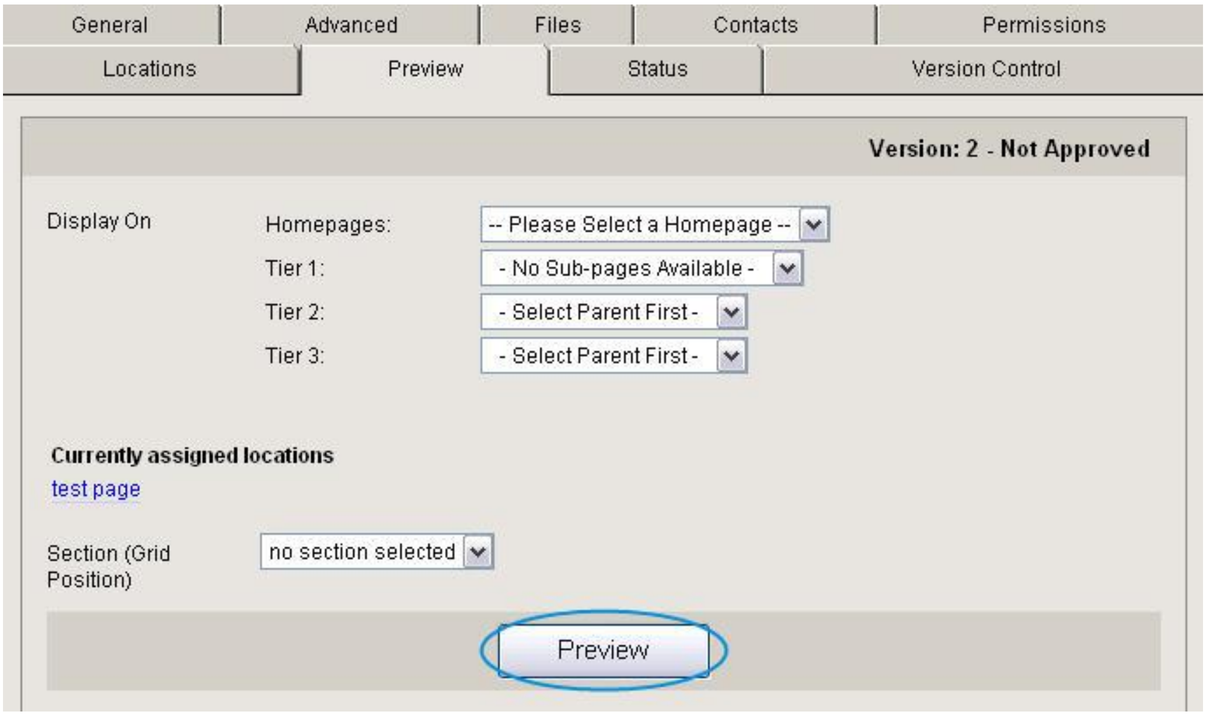
New content can be previewed in context within the site to make sure it is displaying correctly.

> ***Note**: Inline Content Preview is only used for **Newly Created Content**, not for previewing existing content that you may edit.*
>
> *Inline Content is defined as HTML or WYSIWYG content by* Verdi*, and is created using Verdi's WYSIWYG Editor. Imported files cannot be previewed.*

1. Edit your content item and Click on the ***Preview*** tab on the top navigation bar

> ***Note:** This will load the preview screen.*

2. ***Display On*** - work through the drop-down menus to select the page to display your content on.
3. ***Section*** - Select which ***Section (Grid Position)*** the content will appear in. The sections that are available are dependant upon the tier template settings.



4. Click on the ***Preview*** button to view the new inline content.

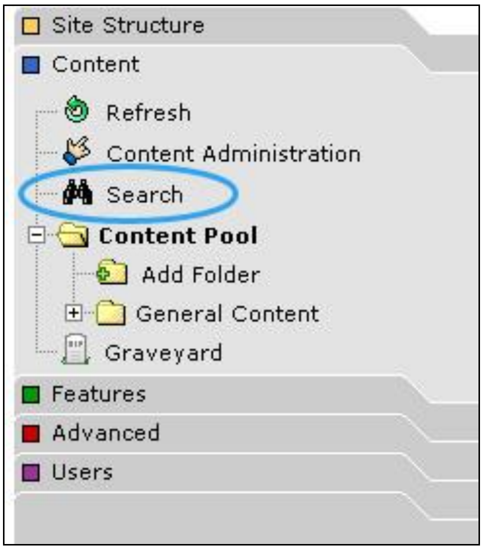
3.6 Searching for Content

There are two ways you can search for content:

1. Via the Content Administration Navigation
2. Via the Site Structure Administration Navigation

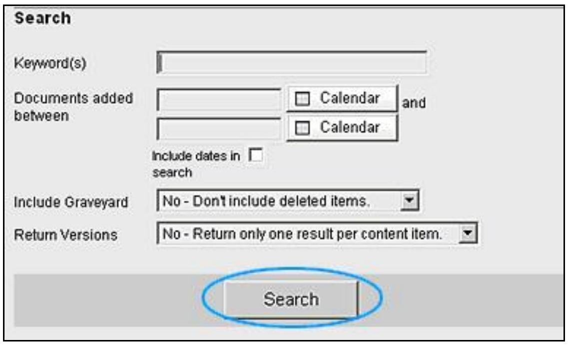
3.6.1 Searching and Editing a Content Pool Item using the Content Administration

1. Click on the ***Content*** option on the side navigation, followed by the ***Search*** link.

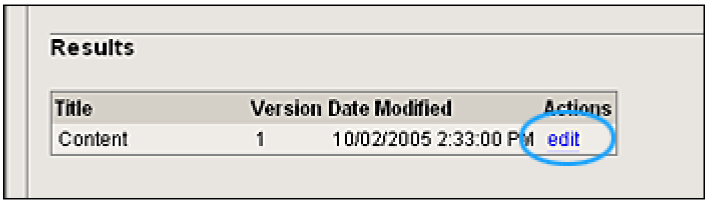


> ***Note***: *The Search options tab will load in the right hand frame*

2. ***Keyword(s)*** - Enter part or all of the name of the content pool item you are looking for.

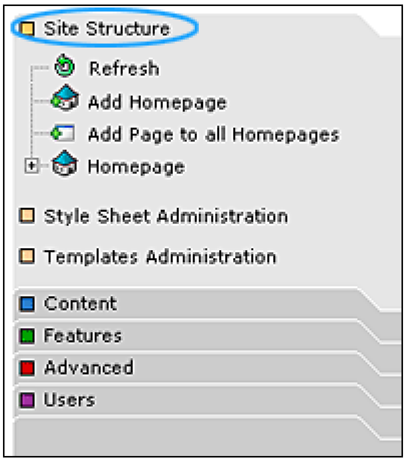


3. ***Documents Added Between*** – using this option select the dates that you would like to search between and check the "*Include dates in search*" option.
4. ***Include Graveyard*** – select "*Yes – Search includes deleted items*" if you suspect that the content item has been deleted.
5. ***Return Versions*** – select "*Yes – Return all versions matching my search*" only if you want all versions of the document returning in the search.
6. Click the ***Search*** button to search for the content item.
7. From the results, click ***Edit*** on the desired content pool item and make any required changes.



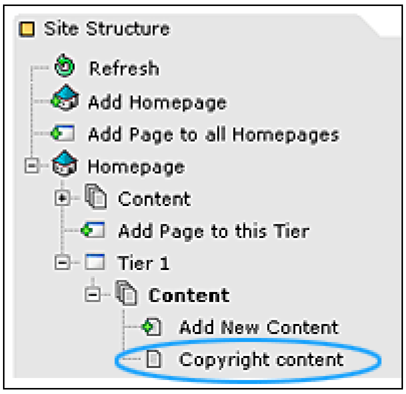
3.6.2 Searching for and Editing Content Using the Site Structure

1. Click on the ***Site Structure*** option on the left navigation



> ***Note:*** *The Site Structure menu should open below the menu link (see above)*

2. Using the side navigation, drill-down until you find the homepage or tier you suspect that the content pool item is associated to.



3. Click on the '**+**' sign next to the **Content** menu option
   Content Pool Items that have been assigned to the homepage or tier are listed within the ***Content*** menu.
4. Click on the Content Pool Item you would like to edit

> ***Note:*** *The Content Pool Item form will load. See section 3 for further instructions on administering content*

3.7 Using the Edit Pencil to Edit a Content Pool Item

What is the Edit Pencil?

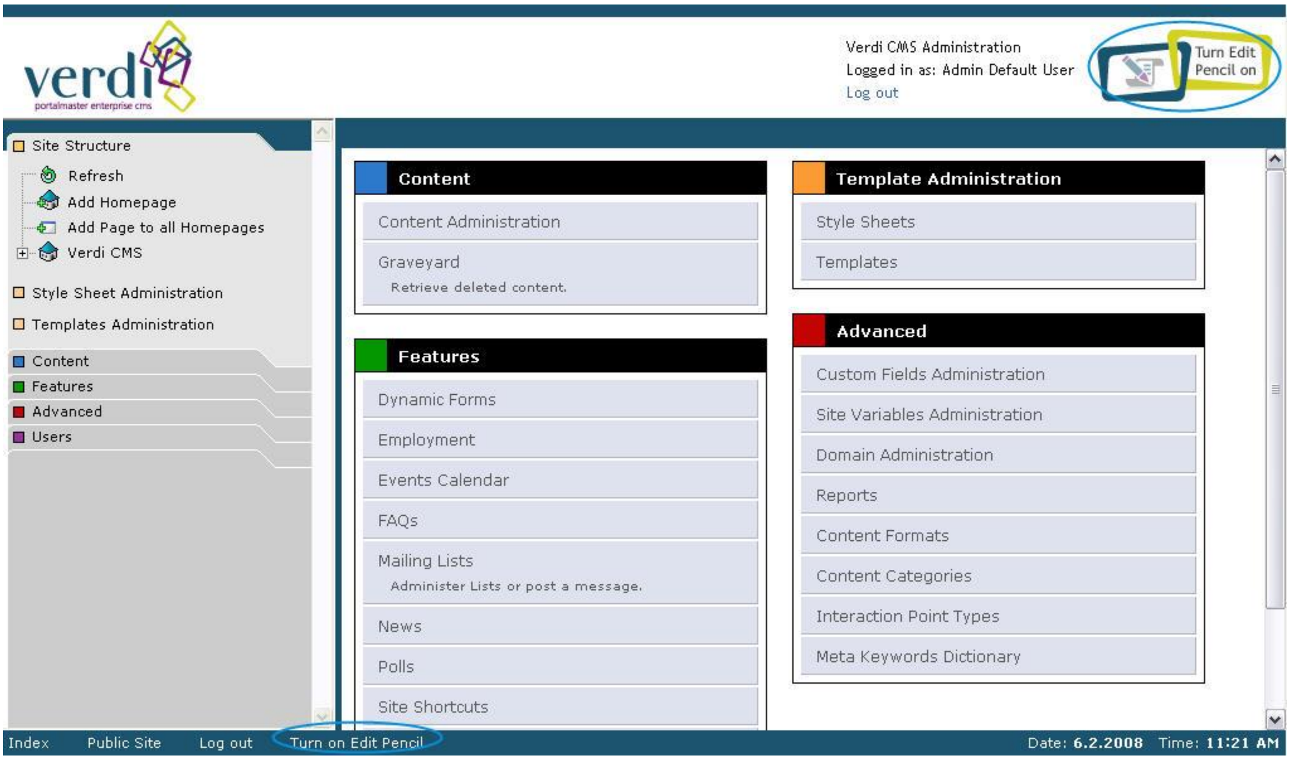
The edit pencil allows authorised administrators to locate items that require editing through the public site, and then link directly to the content item in the administration in edit mode. In the public view, authorised administrators have those areas to which they have administrative privileges highlighted, and an edit link is displayed. On clicking the button the administrator is linked directly to that content in the administration system in edit mode.

By selected the pencil icons in the administration area, you can turn the edit pencil function on and off:

Edit pencil is turned off.

Edit pencil is turned on.

1. Click on the ***Turn on Edit Pencil*** option located at the bottom of the Administration screen or click on the pencil icon located in the Administration page header.



***Note**: The public website will open in a new window*

2. Content Pool Items and Tiers that you have permission to edit will display with a pencil icon.

3. Click on the required icon to load the content item or tier within the administration and make any required changes.

3.8 Setting your Content Pool Item Pop-Up Settings

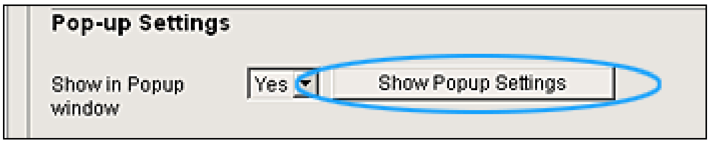
What is a Pop-Window?

A pop up window is a small window that opens in a new browser screen above the screen you are currently using. Verdi allows you to display certain pages within your site within a pop up window. The following steps describe what can be administered within this.

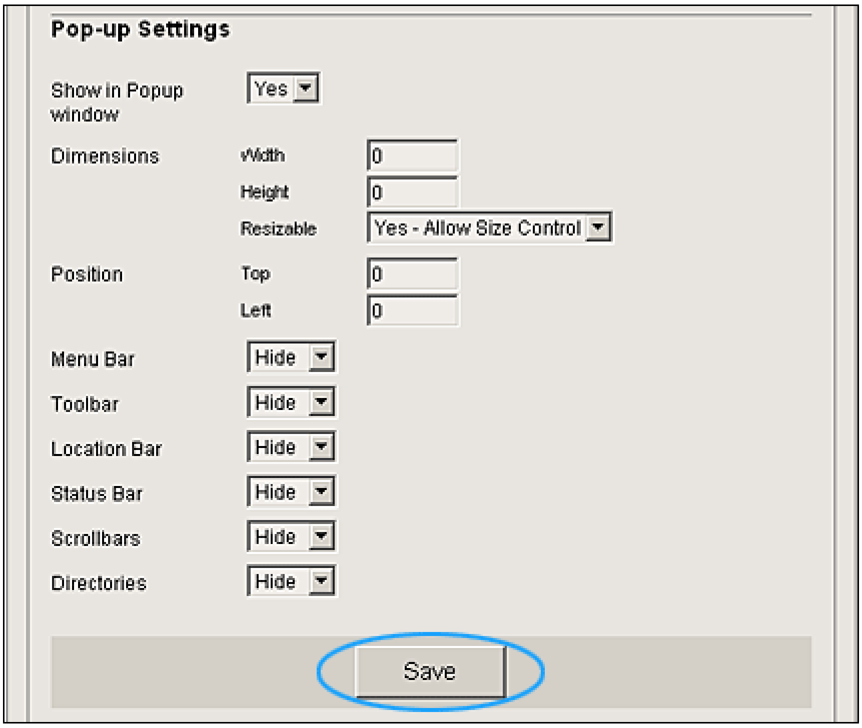
1. Select the content pool item that you want to administer the pop-up settings for.

2. Click on the ***Files*** tab, the Content File List will load with the current documents for the content pool item.

3. Click on the ***Edit*** link to access the *Pop-up Settings*.
4. Select '*Yes*' to ***Show in Popup Window*** and click on the ***Show Popup Settings*** button.



Note*: The Pop-up Settings options will open, allowing you to administer the pop-up window settings*



Complete the settings as follows:

5. Enter a ***Width*** for the window in pixels. A common size is 500 pixels.
6. Enter a ***Height*** for the window in pixels. A common size is 500 pixels.
7. To allow users to resize the window once it is opened, set ***Resizable*** to '*Yes – Allow Size Control*'
8. Enter a ***Top Position*** for the window to display. This figure determines how many pixels down from the top of the screen to display the window.
9. Enter a ***Left Position*** for the window to display. This figure determines how many pixels from the left of the screen to display the window.
10. If you would like to display a menu bar on the window, set ***Menu Bar*** to '*Yes*'
11. If you would like to display a toolbar on the window, set ***Toolbar*** to '*Yes*'
12. If you would like to display a location bar on the window, set ***Location Bar*** to '*Yes*'.
13. To display a status bar on the window, set ***Status Bar*** to '*Yes*'.
14. To display a scrollbars on the window, set ***Scrollbars*** to '*Yes*'.
15. To display the browser *Links* toolbar, set ***Directories*** to '*Yes*'
16. Click on the ***Save*** button to finish

> ***Note***: *The Pop-up Settings will be saved*
> *The Content Pool Item will require approving/publishing for the pop-up settings to take effect.*

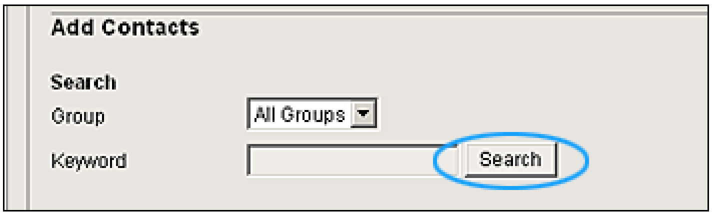
3.9 Adding Contacts to a Content Pool Item

What are Contacts?

Contacts can be added to a particular page or content item to associate the content to a particular administration group or user. If required IBC programmers can display the users name or details on the public site. Eg:(For further information please contact **John Smith**) A primary and many secondary contacts can be attached to a single page or content item.

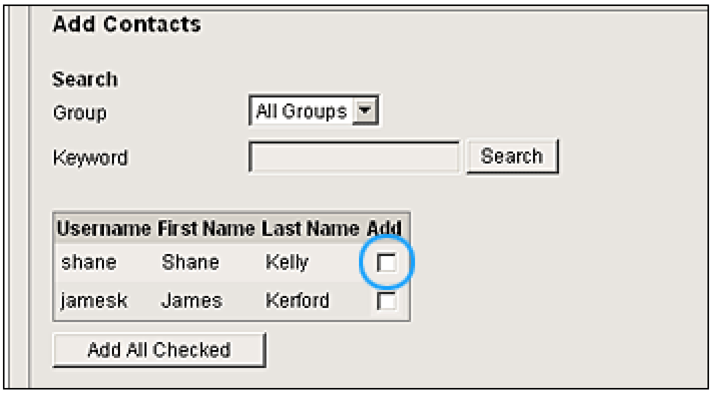
1. Edit the required Content Pool Item and click on the ***Contacts*** tab on the top navigation bar.

2. You can now search for the user that you want to add to the Content Pool Item as a contact.
3. Select "*All Groups*" from the ***Group*** drop-down menu or alternatively select the group that the user belongs to.
4. Enter the user name in the ***Keyword*** text box and click the ***Search*** button.



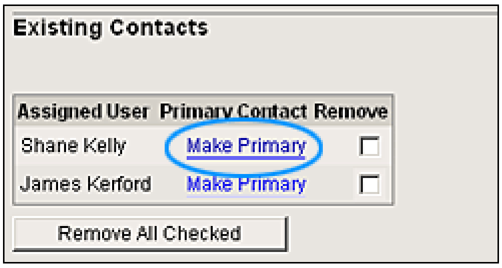
Note: *If no keyword is entered for the search then all users that belong to a group will be returned.*

5. Select the user(s) that you want as a contact by clicking in the checkboxes provided.
6. Click on the ***Add All Checked*** button to add the user.



Note: *The Existing Contacts list will update with the contacts that you selected.*

7. To set a primary contact for the content pool item click on the ***Make Primary*** link.



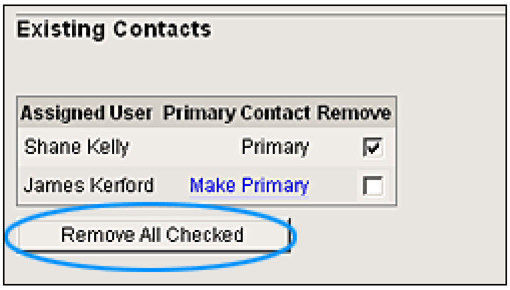
> ***Note:*** *You may select only one* ***Primary Contact*** *for the page. By selecting another user as the primary contact the Existing Contacts list will update with the new primary user.*

3.10 Editing Content Pool Item Contacts

1. Edit the required Content Pool Item and click on the ***Contacts*** tab on the top navigation bar.

2. Scroll to the ***Existing Contacts*** section

3. Remove page contacts as required by clicking on the checkboxes provided.



4. Click on the ***Remove All Checked*** button to finish.

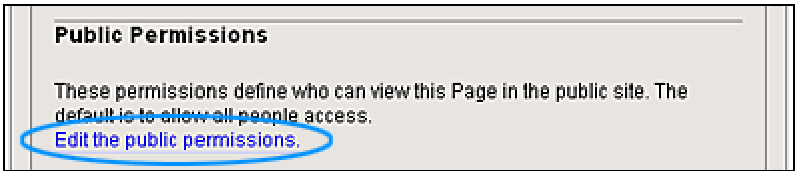
3.11 Adding Permissions to a Content Pool Item

1. Edit the required content pool item and click on the ***Permissions*** tab on the top navigation bar.

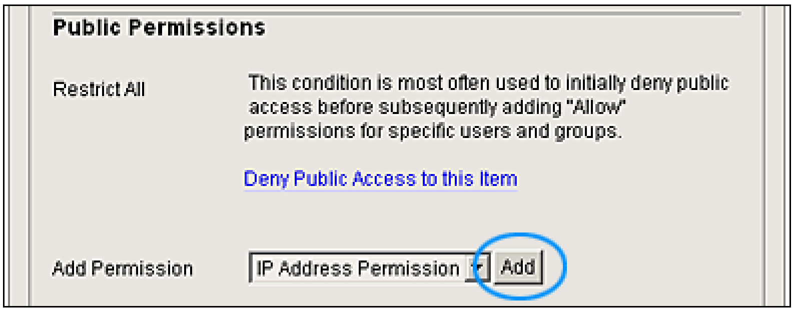
A number of permissions options are available.

3.11.1 Setting IP Address Permissions

1. Click on the ***Edit the Public Permissions*** link

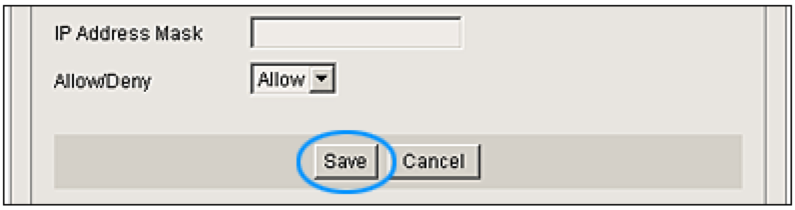


> ***Note:*** *The Public Permissions page will load displaying options for administering public permissions for the page*



2. Select "*IP Address Permission*" from the ***Add Permission*** option

> ***Note:*** *The IP Permissions form will load*



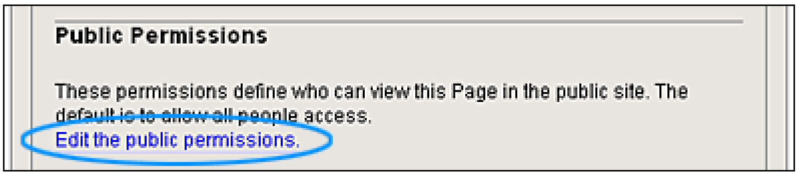
3. Enter an ***IP Address*** in the text box provided

> ***Note:*** *The IP Address must be in the following number format:* ***xxx.xx.xx.xx***

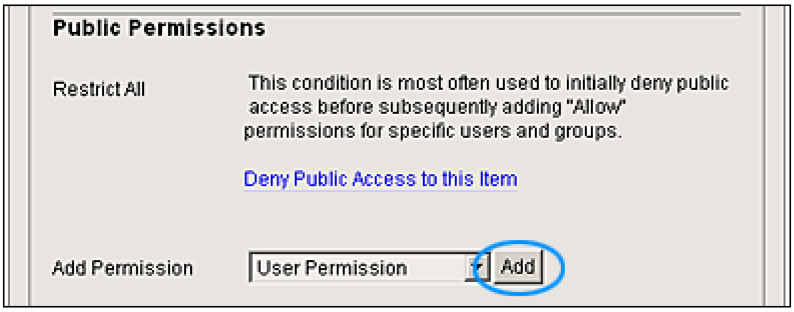
4. Select to ***Allow or Deny*** the IP Address using the drop-down menu
5. Click on the ***Save*** button to finish

3.11.2 Setting Public User Permissions

1. Click on the ***Edit the Public Permissions*** link

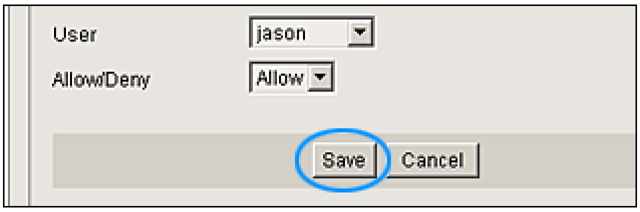


> ***Note:*** *The Public Permissions page will load displaying options for administering public permissions for the page*



2. Select "*User Permission*" from the ***Add Permission*** option

> ***Note:*** *The User Permissions form will load*



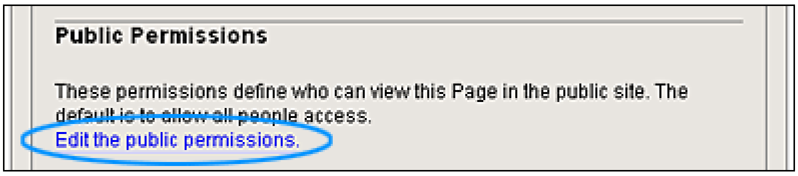
3. Select a ***User*** from the drop-down menu

> ***Note:*** *Users are administered through the User Administration section. Depending upon your level of access, you may need to speak to your Site Administrator to have users added or removed from the list.*

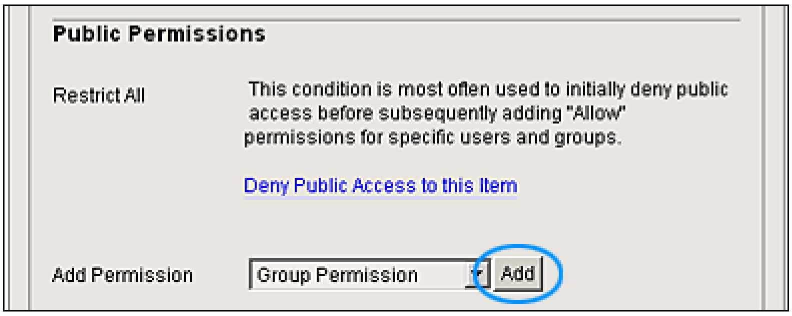
4. Select to ***Allow or Deny*** the user from using the drop-down menu
5. Click on the ***Save*** button to finish.

3.11.3 Setting Public Group Permissions

1. Click on the ***Edit the Public Permissions*** link

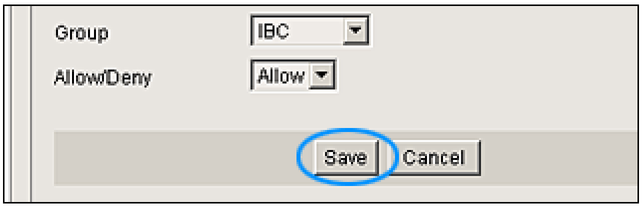


> ***Note:*** *The Public Permissions page will load displaying options for administering public permissions for the page*



2. Select “*Group Permission”* from the ***Add Permission*** option

> ***Note:*** *The Group Permissions form will load*



3. Select a ***Group*** from the drop-down menu

> ***Note:*** *Groups are administered through the Users Administration section. Depending upon your level of access, you may need to speak to your Site Administrator to have groups added or removed from the list.*

4. Select to ***Allow or Deny*** the user from using the drop-down menu
5. Click on the ***Save*** button to finish.

3.12 Editing and Deleting Individual Permissions

1. Edit the required tier and click on the ***Permissions*** tab on the top navigation bar.

Note: *The Permissions form will load*

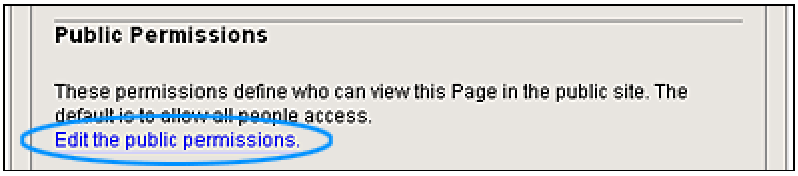
2. Select which permissions you wish to remove or edit

Options available:

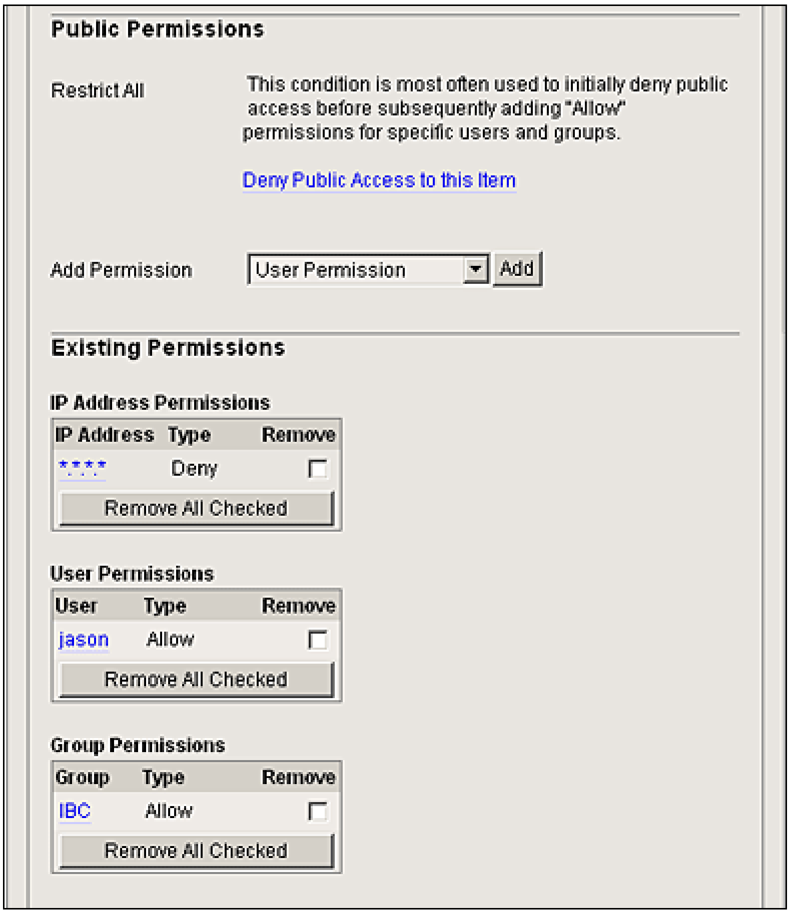
- Public Permissions
- Admin Permissions

3.12.1 Editing and Deleting Public Permissions

1. Click on the ***Edit the public permissions*** link



Note: *The Public Permissions form will load.*



2. Edit Permission

a. Click on the Permission link for the permission you wish to edit.

b. The permission details will load. Make any required changes.

c. Click the ***Save*** button to finish.

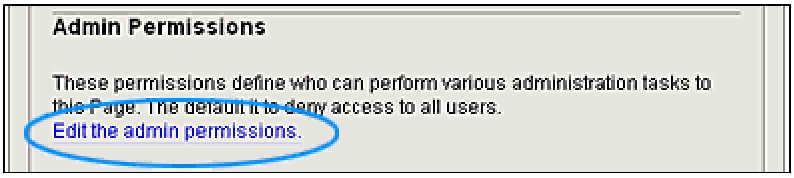
Alternatively, you can remove the permission(s).

3. Delete Permission

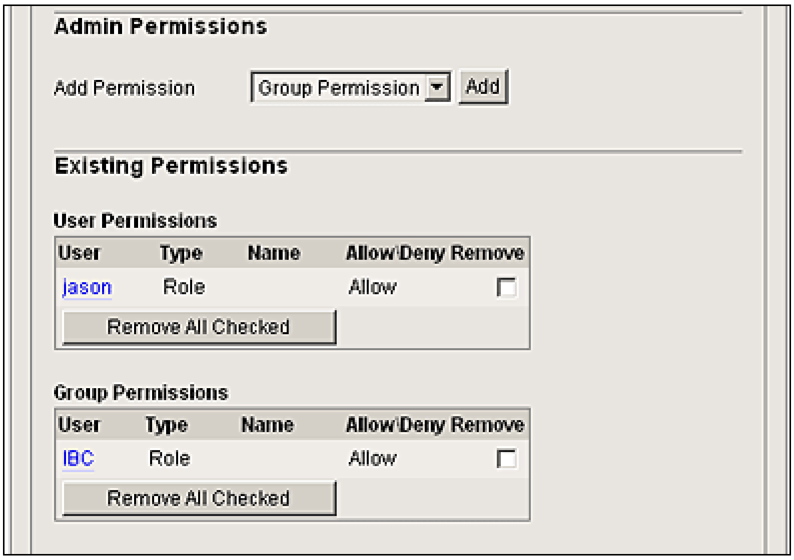
a. Select the permission(s) you wish to remove by checking the ***Remove*** checkbox.
b. Click ***Remove All Checked*** to remove permissions as required.

3.12.2 Editing and Deleting Admin Permissions

1. Click on the ***Edit the admin permissions*** link



Note: *The Admin Permissions form will load.*



2. Edit Permission

a. Click on the Permission link for the permission you wish to edit.
b. The permission details will load. Make any required changes.
c. Click the ***Save*** button to finish.

Alternatively, you can remove the permission(s).

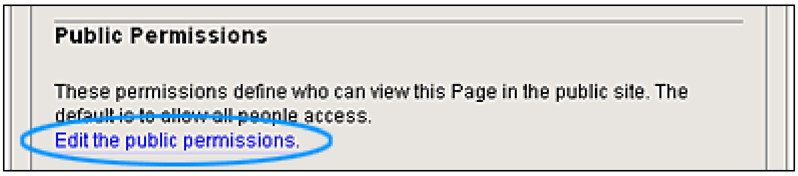
3. Delete Permission

a. Select the permission(s) you wish to remove by checking the ***Remove*** checkbox.
b. Click ***Remove All Checked*** to finish

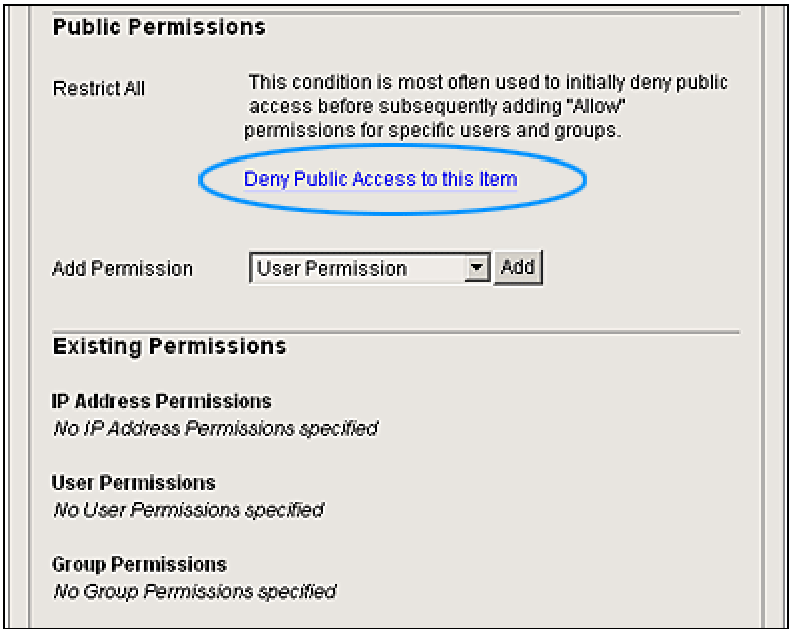
3.13 Restricting All Users

1. Edit the required tier and click on the ***Permissions*** tab on the top navigation bar.

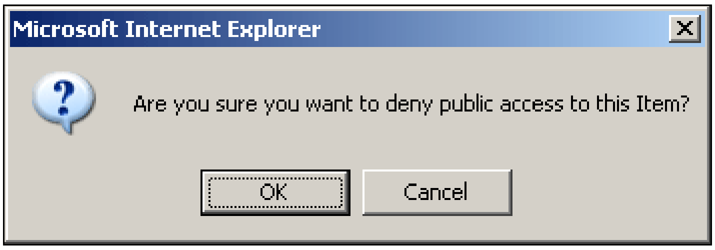
2. Click on the ***Edit the Public Permissions*** link



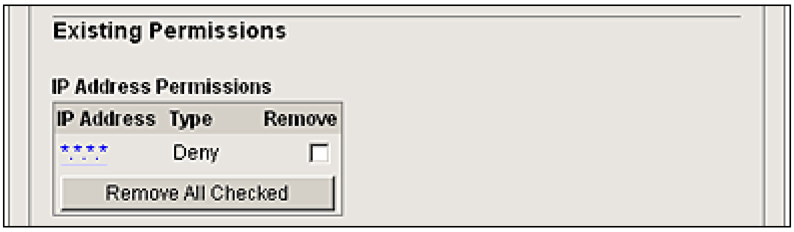
Note: *The Public Permissions form will load*



3. Click on the ***Deny Public Access to this Item*** link



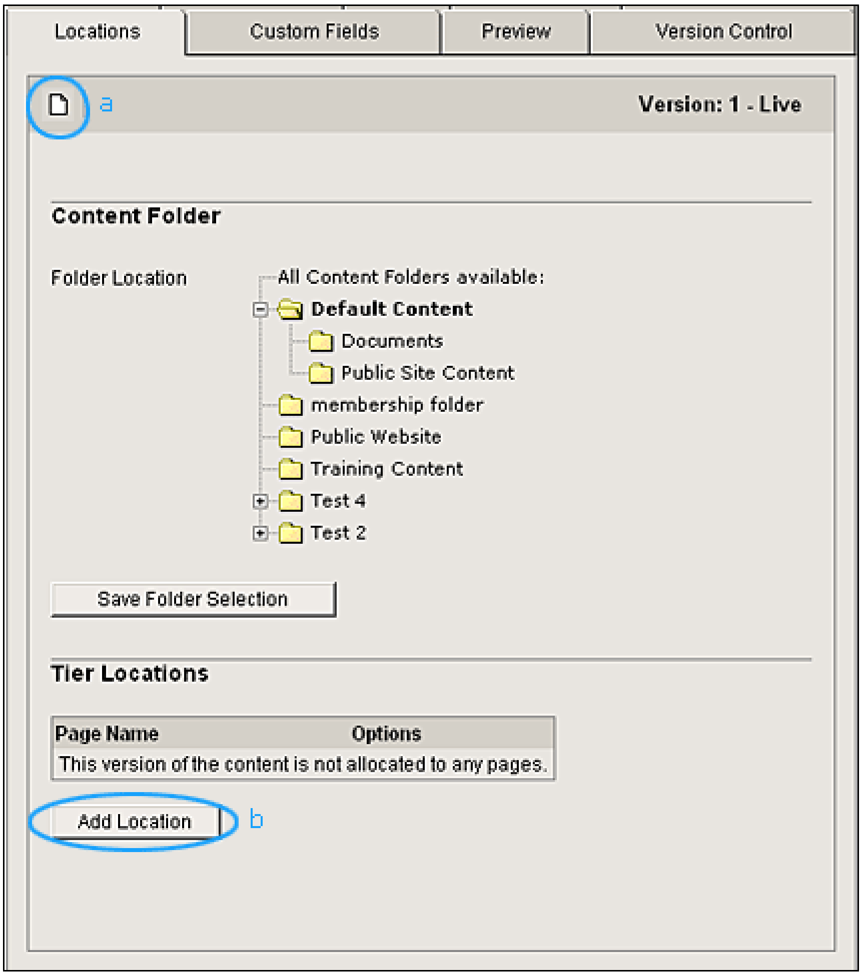
4. Click on the ***OK*** button to confirm or click on the ***Cancel*** button to stop the restriction
5. If ***OK*** is selected, the permissions page will show that all IP Addresses are blocked from access to the page (see below).


Existing Permissions
IP Address Permissions
IP Address
Type
Remove
..*.*
Deny
Remove All Checked

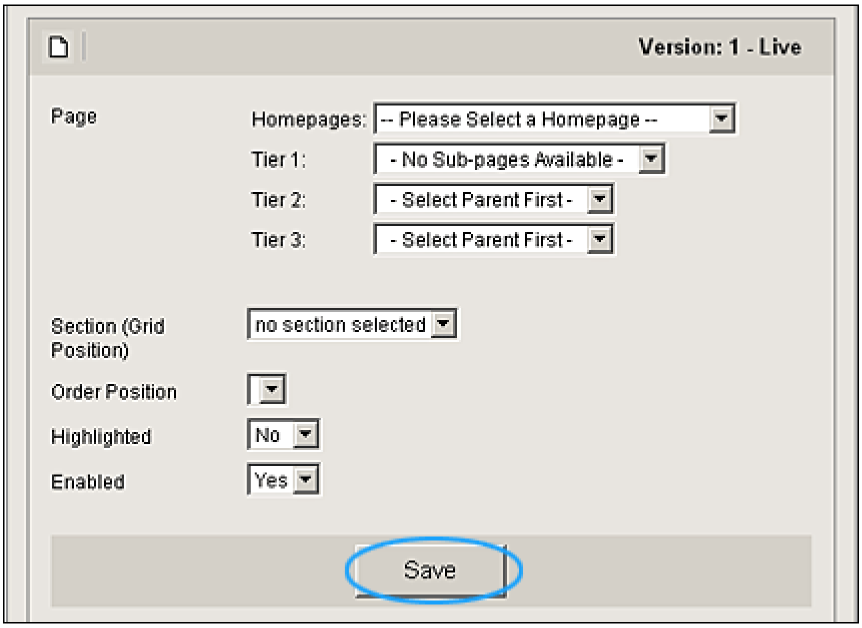
3.14 Adding a Display Location to a Content Pool Item

1. Edit the required Content Pool Item and click on the ***Locations*** tab on the top navigation bar.

2. You can add a new location two ways here.
   Click on the (a) ***New Tier Location*** icon located on the top navigation bar or scroll down and click on the (b) ***Add Location*** button in the Tier Locations section.



Note: *The Add a Location form will load*



3. Use the ***Tier Element*** drop-down menus to select a location to display the Content Pool Item

> ***Note:*** *If you select an invalid display location, an alert will display together with a link to* ***Administer the Tier Element****. Clicking on this link will load the tier metadata page. The tier template will need to be changed before the content will be displayed. See section 2.6 for more details on administering the tier template*

4. Use the ***Section (Grid Position)*** drop-down menu to select an area of the page to display the content.

> ***Note:*** *Only grid sections that have been assigned a valid Module will be displayed.*

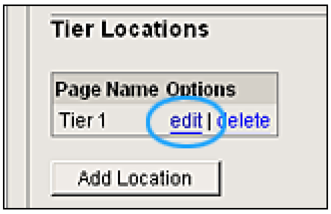
5. If a number of *Inline Content* Pool Items have been assigned to the same section of the page, use the ***Order Position*** drop-down menu to order the items.
6. Set ***Enabled*** to '*Yes*' to activate the display location
7. Click on the ***Save*** button to finish

> ***Note:*** *Further display locations may be added to a Content Pool Item, allowing you to display the same content in different locations throughout the website.*

3.15 Editing a Display Location for a Content Pool Item

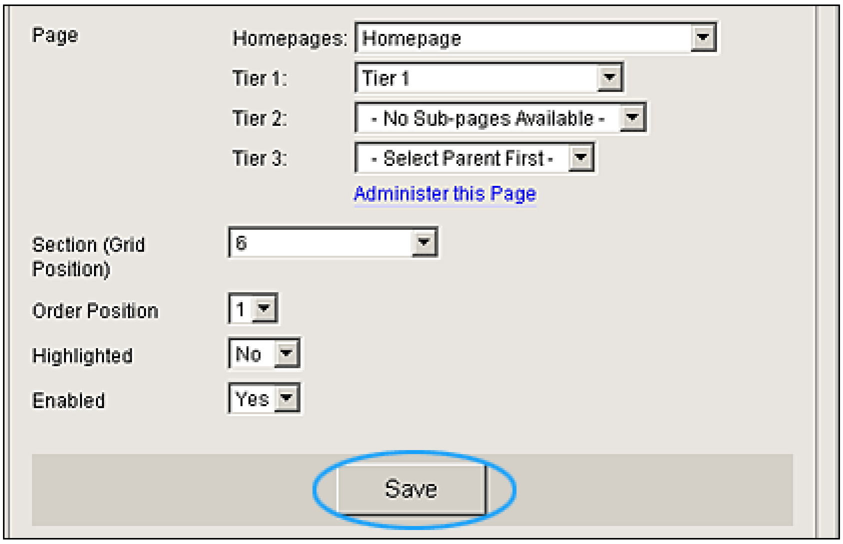
1. Edit the required Content Pool Item and click on the ***Locations*** tab on the top navigation bar.

2. Click on the ***Edit*** option for the display location you would like to change



Note: *The Edit a Display Location form will load*

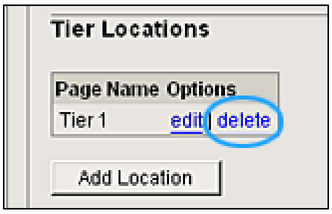
3. Make any required changes and click on the ***Save*** button to finish



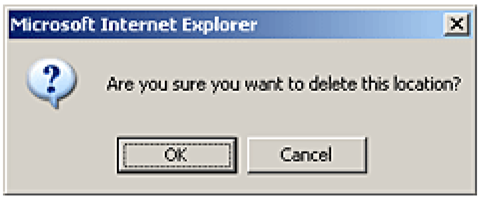
3.16 Deleting a Single Display Location for a Content Pool Item

1. Edit the required Content Pool Item and click on the ***Locations*** tab on the top navigation bar.

2. Click on the ***Delete*** option for the display location you would like to remove



3. Click on the ***OK*** button to confirm or click on the ***Cancel*** button to stop the deletion

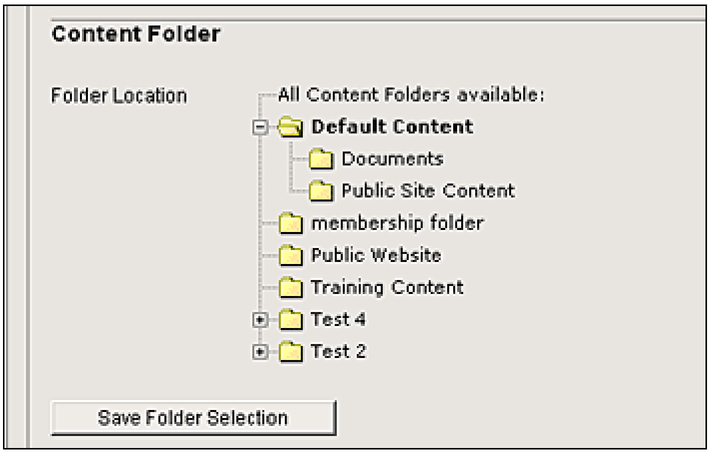


Note: *To delete multiple locations you will have to delete individual locations one at a time*

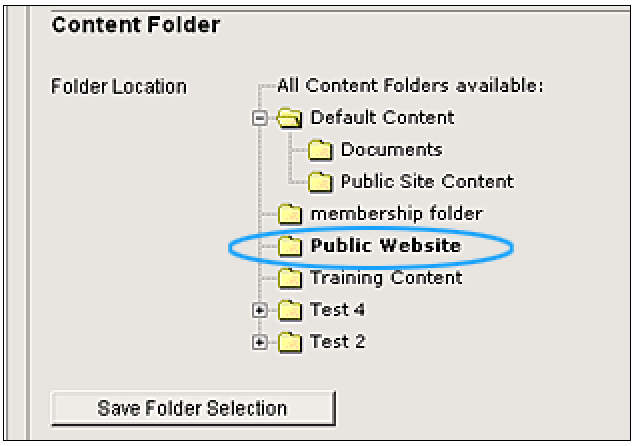
3.17 Editing a Content Pool Items Content Folder

1. Edit the required Content Pool Item and click on the ***Locations*** tab on the top navigation bar.

2. The current folder location will be set to the ***Default Folder*** by default.



3. To change the folder, click on the desired folder and click the ***Save Folder Selection*** button.



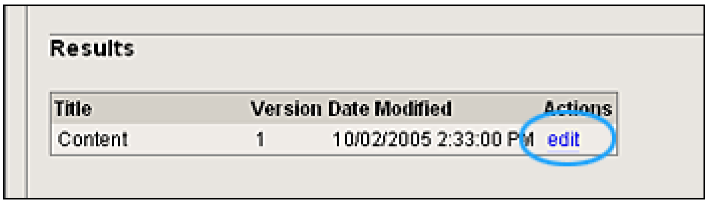
3.18 Deleting Content Pool Items

Content Pool Items may be deleted within Verdi. Items may be retrieved from the Graveyard at any time and published to the live website.

1. Use the ***Content Administration*** search facility to locate the Content Item to be deleted

> ***Note:*** *Alternatively use the* ***Site Structure*** *to navigate to the page that the content is assigned to*

2. Once located, click on the ***Edit*** option



3. Click on the ***Delete*** button.

4. You will be prompted with a confirmation box, click ***OK*** to delete the content pool item or click on the ***Cancel*** button to stop the deletion

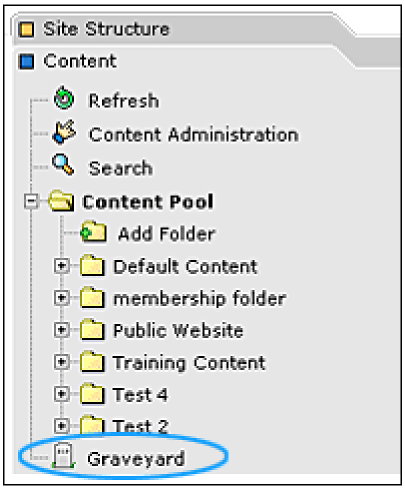
3.19 Restoring Content Pool Items Using Graveyard

What is the Graveyard?

The Graveyard is where Content Pool Items are sent after they have been deleted. Content that is currently in the Graveyard can be restored by editing it and selecting "Undelete" from the toolbar menu. Note that you may have to change the Folder/Tiers in which the restored Content resides as they may have changed since the Content was deleted.

Using the Graveyard, Content Pool Items can be restored to their original version before any modifications were made.

1. Click on the ***Graveyard*** option within the side navigation



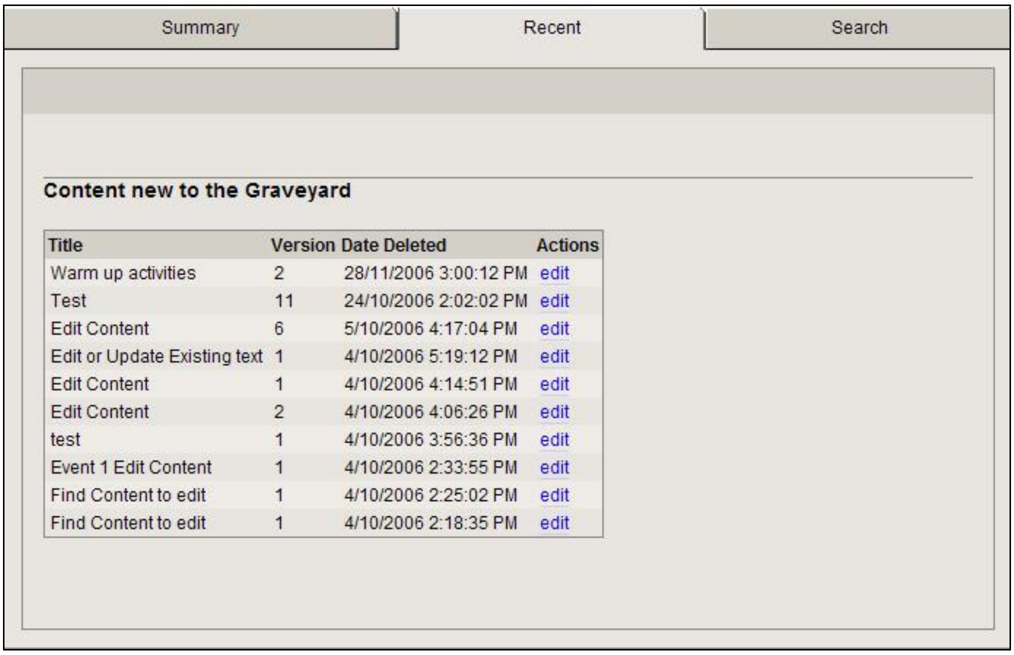
> ***Note:** The Graveyard Summary page will load. Use the **Recent** tab to view recently archived content or use the **Search** tab to search for specific content pool items.*

3.19.1 Using the Recent tab in the Graveyard to find a Content Pool Item

The recent tab within the Graveyard displays an ordered listing of the most recently deleted items.

1. Click on the ***Graveyard*** option within the side navigation

2. Click on the ***Recent*** tab option

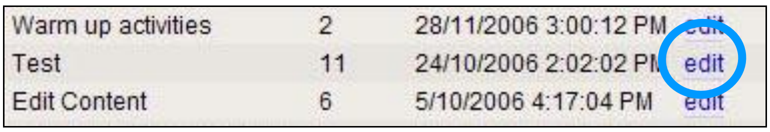


Title	Version	Date Deleted	Actions
Warm up activities	2	28/11/2006 3:00:12 PM	edit
Test	11	24/10/2006 2:02:02 PM	edit
Edit Content	6	5/10/2006 4:17:04 PM	edit
Edit or Update Existing text	1	4/10/2006 5:19:12 PM	edit
Edit Content	1	4/10/2006 4:14:51 PM	edit
Edit Content	2	4/10/2006 4:06:26 PM	edit
test	1	4/10/2006 3:56:36 PM	edit
Event 1 Edit Content	1	4/10/2006 2:33:55 PM	edit
Find Content to edit	1	4/10/2006 2:25:02 PM	edit
Find Content to edit	1	4/10/2006 2:18:35 PM	edit

***Note**: The Recent tab window will open, allowing you to view the most recently archived content pool items to help you find items that you may have deleted accidentally.*

3. If the content pool item that you archived appears in this list then click the ***Edit*** link to open the content pool item.

***Note**: If the content pool item that you are looking for does not appear in the list then you will need to use the **Search** tab to help you find it.*



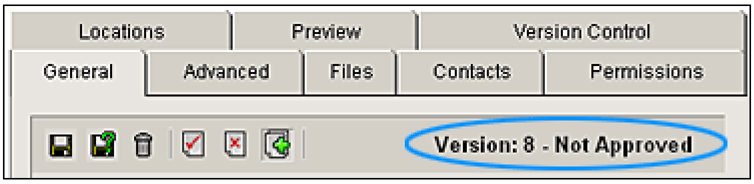
Warm up activities	2	28/11/2006 3:00:12 PM	edit
Test	11	24/10/2006 2:02:02 PM	edit
Edit Content	6	5/10/2006 4:17:04 PM	edit

***Note**: The deleted version of the selected Content Pool Item will display*

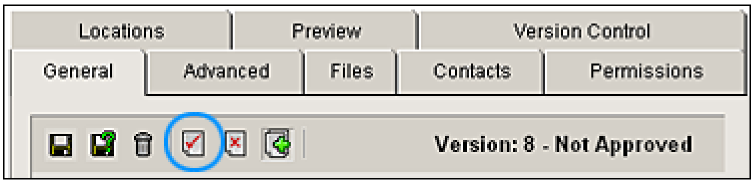
4. You will notice that the (a) ***Version*** status of the Content Pool Item has changed to deleted.

5. To reinstate the content click on the (b) ***Undelete*** icon option (see above illustration).

> ***Note****: The Version status of the document will now change. The version number will increment by one so if it was version 1 it will now be version 2. Also the document will also require approving/publishing now that it has been restored from the graveyard.*

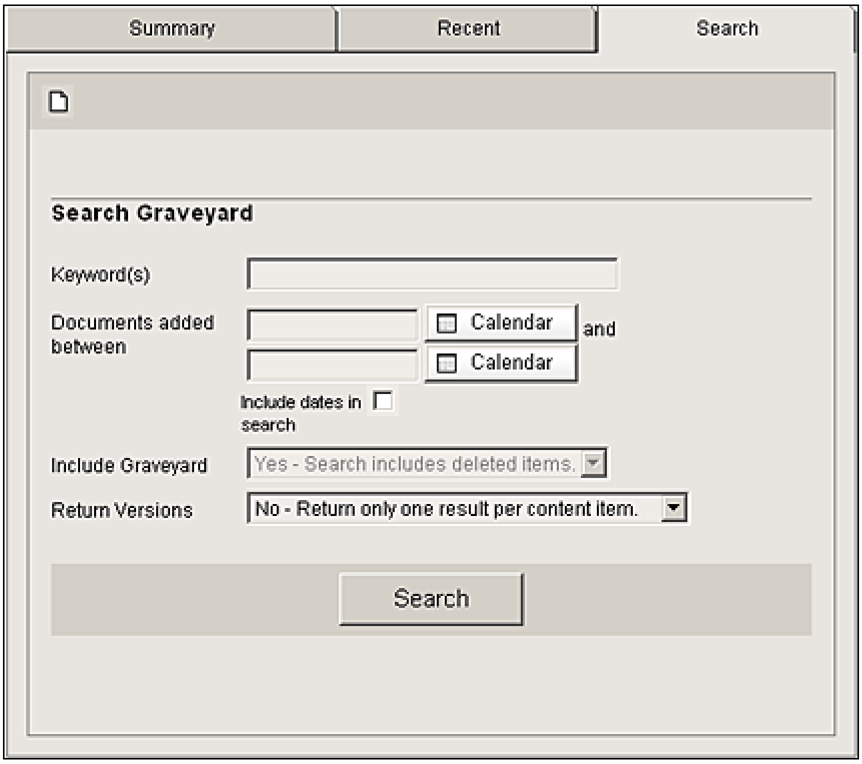


6. Click on the ***Publish Content*** icon to restore the content to the site.



3.19.2 Using Version Control with Search Content Pool

1. Click on the ***Search*** tab in the Graveyard



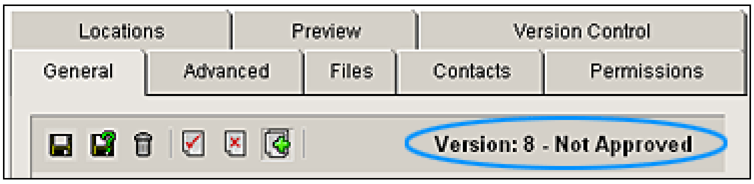
2. Enter some search criteria and click on the ***Search*** button.
3. The results of the search will be displayed below
4. Click on the ***Edit*** link for the Content Pool Item you would like to restore

> ***Note**: The deleted version of the selected Content Pool Item will display*

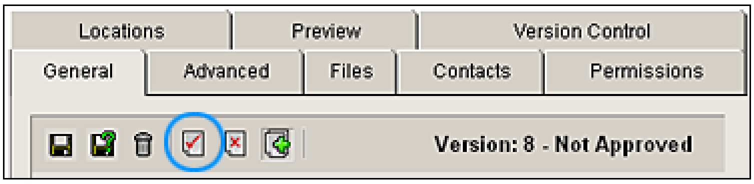
5. You will notice that the (a) ***Version*** status of the Content Pool Item has changed to deleted.

6. To reinstate the content click on the (b) ***Undelete*** icon option (see above illustration).

> ***Note**: The Version status of the document will now change. The version number will increment by one so if it was version 1 it will now be version 2. Also the document will also require approving/publishing now that it has been restored from the graveyard, see section 10.2.*



7. Click on the ***Publish Content*** icon to restore the content to the site.



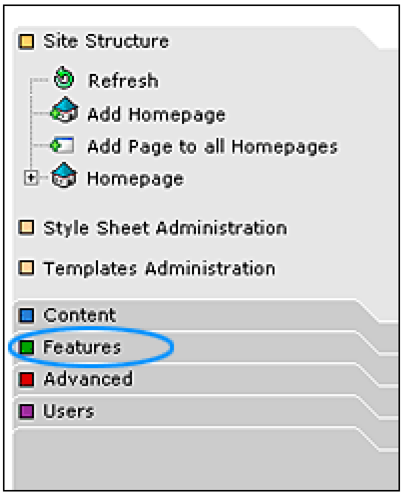
4 Features Administration

4.1 Dynamic Forms

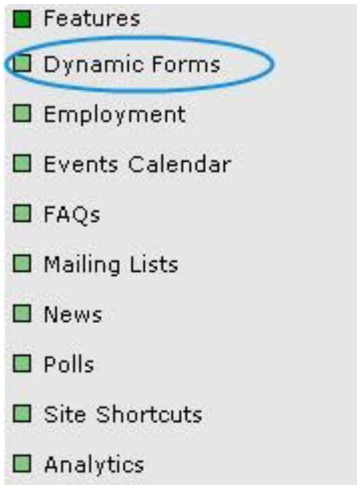
Verdi enables you to create your own online forms without the need for any programming skills.

4.1.1 Create a New Dynamic Form

1. Click on the ***Features*** section in the left navigation.

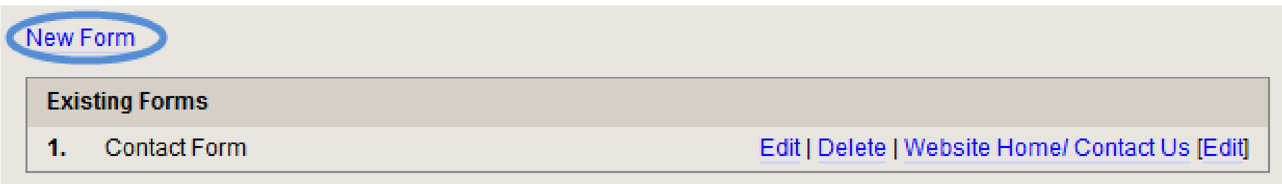


2. Click on the ***Dynamic Forms*** option.



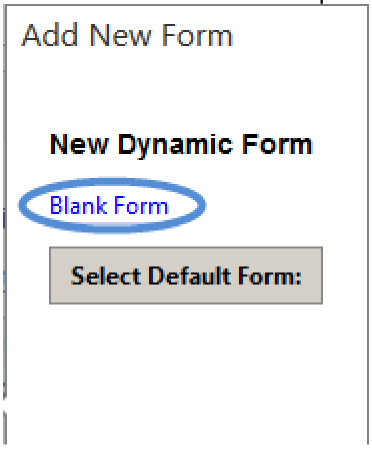
> ***Note****: The* ***Dynamic Forms Administration*** *will load*

3. Hover over the on the ***New Form*** option.

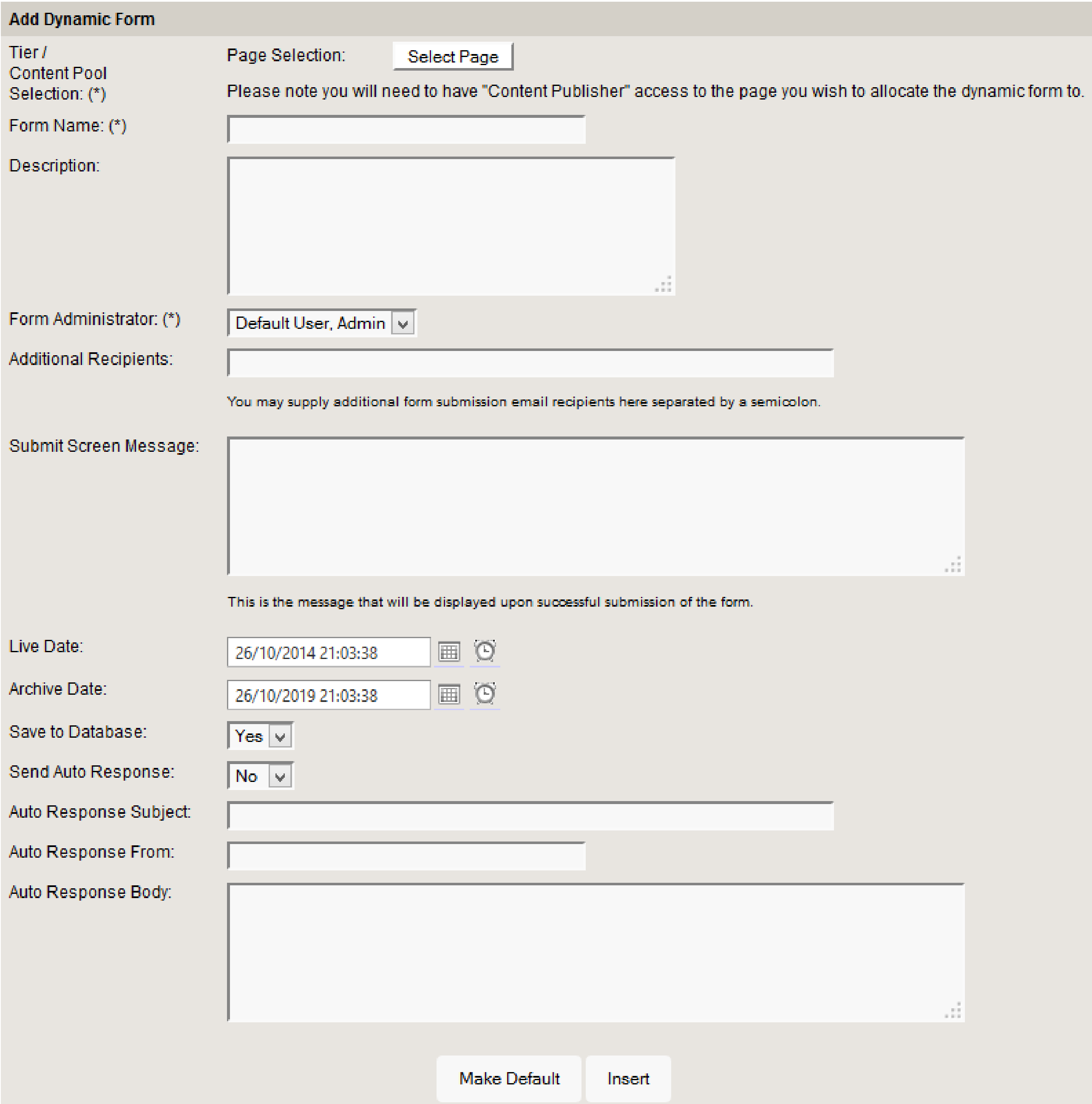


> ***Note****: The* ***Dynamic Form Select*** *form will load as a popup. Clicking on the* ***New Form*** *link will automatically select the* ***Blank Form*** *option.*

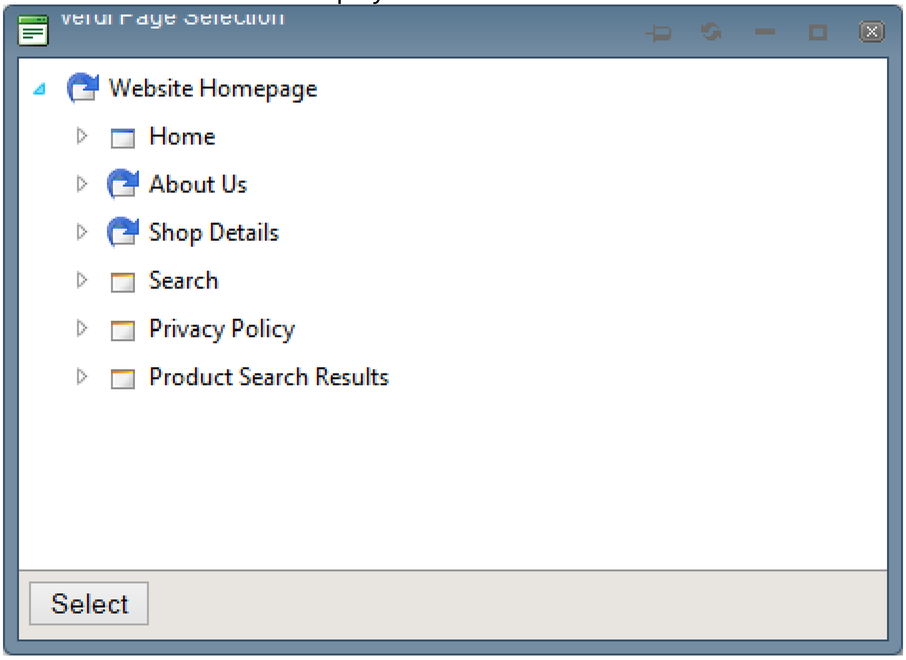
4. Click on the ***Blank Form*** option.



Note: *The **Add Dynamic Form** form will load*



5. Click the ***Select Page*** button to display the Verdi Page Selector popup window. Use this popup window to select a tier to display the form.



6. Enter a ***Form Name*** of your desire.
7. Enter a brief ***Description*** for the form (This will not be displayed on the public form. It is only for administration and search purposes)
8. From the ***Form Administrator*** list select the person who will be the administrator of the form. When a user completes and submits a form, the form details will be emailed to the selected Form Administrator.
9. Enter any ***Additional Recipients*** that you want the form details to be emailed to.

> ***Note****: Multiple* ***Additional Recipients*** *can be specified separated by a semi colon.*

10. Enter the ***Submit Screen Message*** that you want displayed to the user once they have successfully submitted the form.

> ***Note****: If you would like to include any of the form fields in the Submit Screen Message this can be done by adding the fields place holder reference surrounded by dollar double signs. E.g. If you wanted to output the value of the field you set to "name" you would include the place holder "$$name$$" in the position where you want the name value.*

11. Select a date for the form to appear on the website, using the ***Live Date*** drop-down menus.
12. Select a date for the form to be removed from the website, using the ***Archive Date*** drop-down menus.
13. ***Saving Form Results to a database***
    a. **Select 'No'** and your form results will be sent via text in an email to the Form Administrator.
    b. **Select 'Yes'** if you wish you form results to be stored within a database
14. Auto response Setup (See step 4.1.6)
15. Select the INSERT button

> ***Note****: You have just created a blank form. Now you need to add the fields to the form*

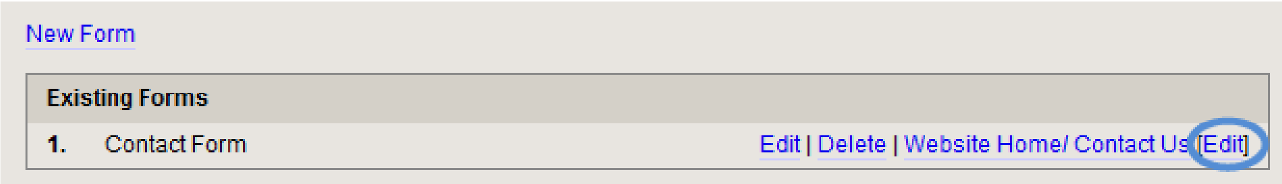
> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the IP type. Follow the next steps to modify the pages template and publish your feature to the public site.*

4.1.2 Publishing your Form feature on the Public Site

The page you wish to place your feature on must have the required feature IP type within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for an IP Type or Feature to be located.

1. Find the content item you wish your feature to be displayed on

   a. Select ***Edit*** next to the page name on the form listing page.



   <u>Or</u>

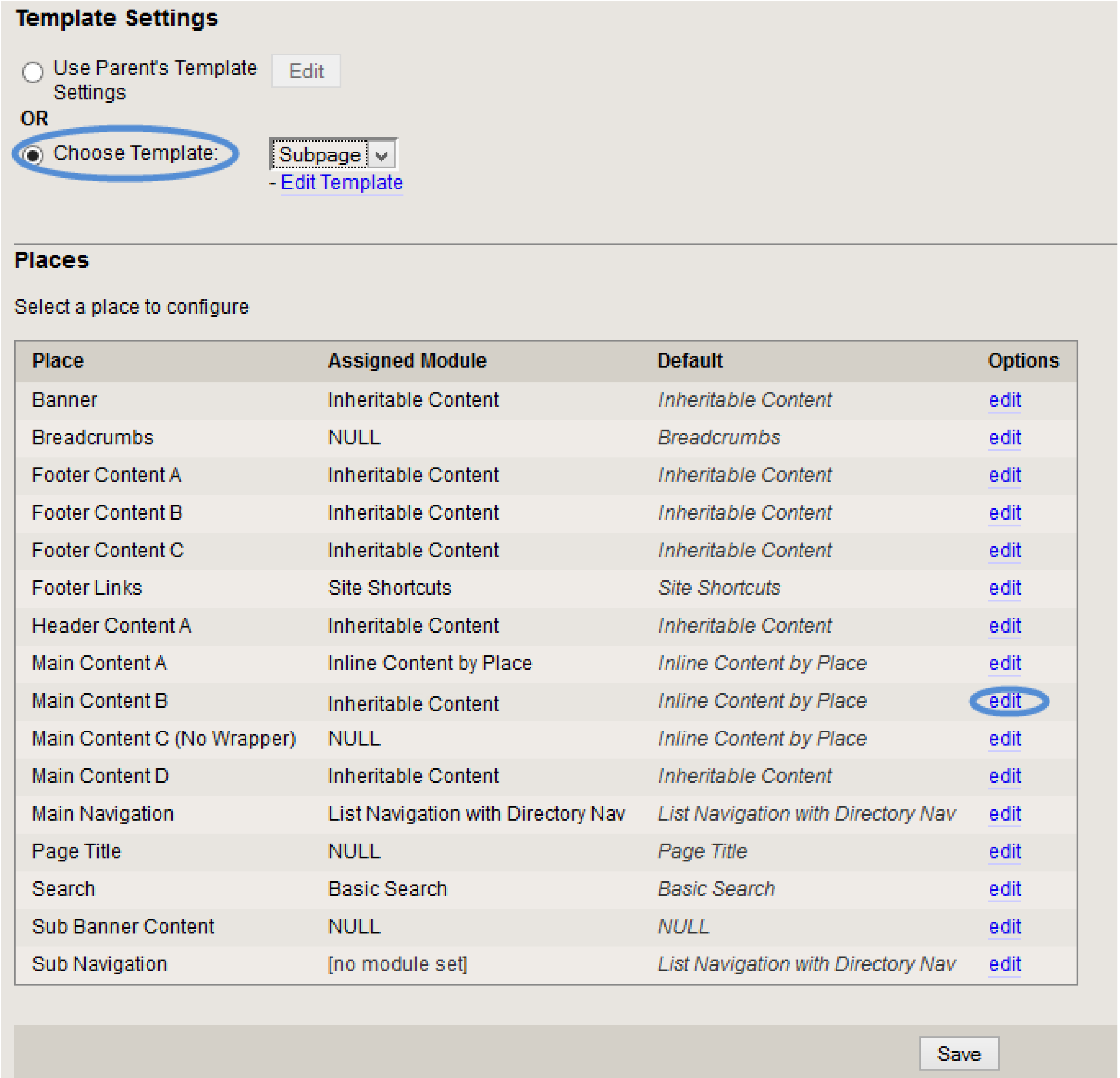
   a. From the Site Structure left navigation, select the page you wish the feature to be displayed on.

   b. Select the ***Template Settings*** Tab

2. Select the ***Choose Template*** radio button, and select the required pages template from drop down menu.

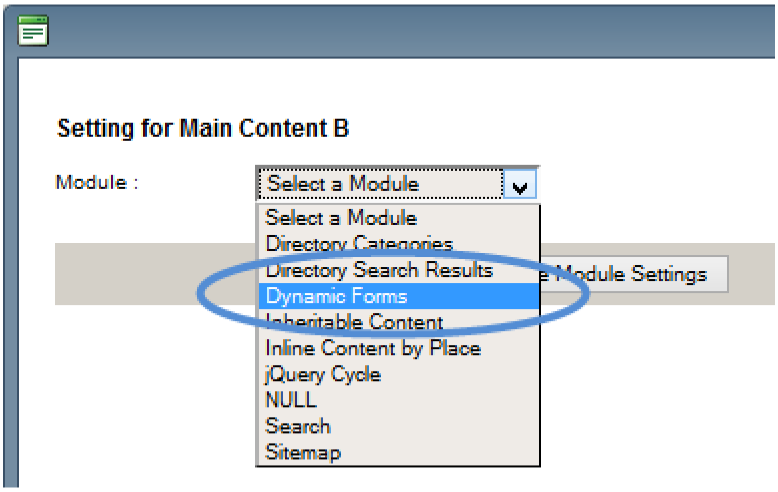
3. Select ***Show Layout*** button, and select the required pages template from drop down menu.

4. The following screen will load:



Place	Assigned Module	Default	Options
Banner	Inheritable Content	*Inheritable Content*	edit
Breadcrumbs	NULL	*Breadcrumbs*	edit
Footer Content A	Inheritable Content	*Inheritable Content*	edit
Footer Content B	Inheritable Content	*Inheritable Content*	edit
Footer Content C	Inheritable Content	*Inheritable Content*	edit
Footer Links	Site Shortcuts	*Site Shortcuts*	edit
Header Content A	Inheritable Content	*Inheritable Content*	edit
Main Content A	Inline Content by Place	*Inline Content by Place*	edit
Main Content B	Inheritable Content	*Inline Content by Place*	edit
Main Content C (No Wrapper)	NULL	*Inline Content by Place*	edit
Main Content D	Inheritable Content	*Inheritable Content*	edit
Main Navigation	List Navigation with Directory Nav	*List Navigation with Directory Nav*	edit
Page Title	NULL	*Page Title*	edit
Search	Basic Search	*Basic Search*	edit
Sub Banner Content	NULL	*NULL*	edit
Sub Navigation	[no module set]	*List Navigation with Directory Nav*	edit

5. Select which section of the template you wish your feature to display by clicking on the ***edit*** link next to the section.



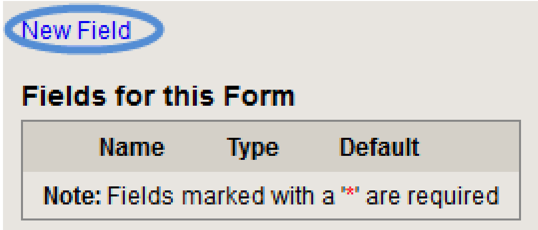
6. Find your feature item and select it from the dropdown menu. Click ***Save Module Settings*** to apply this module to the section.

7. Select the ***Save*** button to save your changes.

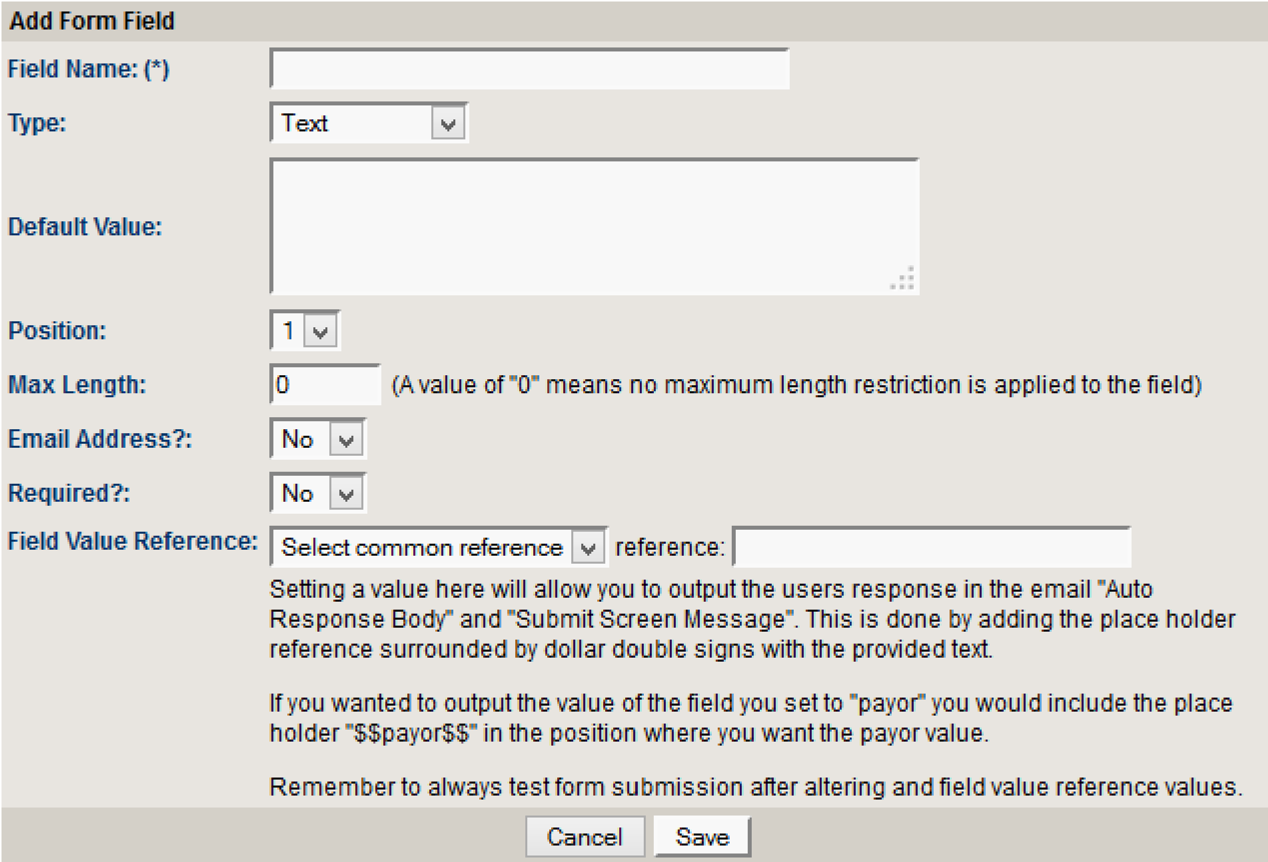
> *Note: Your feature will now be displayed within the page on the public site.*

4.1.3 Adding Fields to a Form

1. ***Edit*** the required form and click on the ***New Field*** option.



> ***Note**: The **Add Form Field** form will load*



2. Enter a ***Field Name***. Typing a new ***Field Name*** will create a new field. Typing an existing ***Field Name*** will group certain form ***Types***, such as select boxes.

3. Select a form ***Type***

Options include:
- ***Checkbox*** – inserts a checkbox field
- ***File*** – inserts a file field to allow users to browse and attach a file from their local or network drive

- ***Password*** – inserts a password field, which blanks out characters when they are entered into the field
- ***Radio Button*** – inserts a radio button field
- ***Select*** – inserts a select field, allowing users to select items from a drop-down list box
- ***Select Multi*** – inserts a select box, allowing uses to select multiple items from a list
- ***Text*** – inserts a text field
- ***Text Area*** – inserts a text area field, which allows for additional input

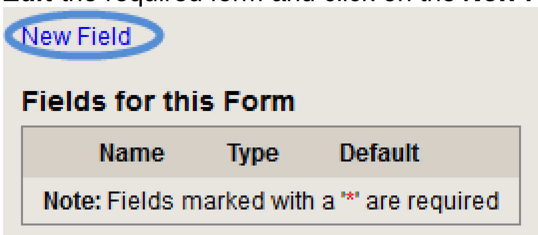
4. Enter a ***Default Value*** for the field. This value will be pre-filled in the field within the form
5. Enter a ***Field Description***. This is an internal descriptive for the field.
6. Select a position for the field within the form using the ***Position*** drop-down menu
7. Enter a ***Max Length*** value for the field. This value represents the length of the field within the form and a common value is 50.
8. Choose whether the field is for an email address using the ***Email Address*** drop-down menu. If the form field that you are adding is for an email address then this should be set to *Yes*.
9. Choose whether the field is mandatory using the ***Required*** drop-down menu
10. Select or enter a ***Field Value Reference***. Setting a value here will allow you to output the users response in the email "Auto Response Body" and "Submit Screen Message". This is done by adding the place holder reference surrounded by dollar double signs with the provided text. E.g. If you wanted to output the value of the field you set to "name" you would include the place holder "$$name$$" in the position where you want the name value.
11. Click the ***Save*** button to finish

> ***Note****: Further fields may be added to make up the form*

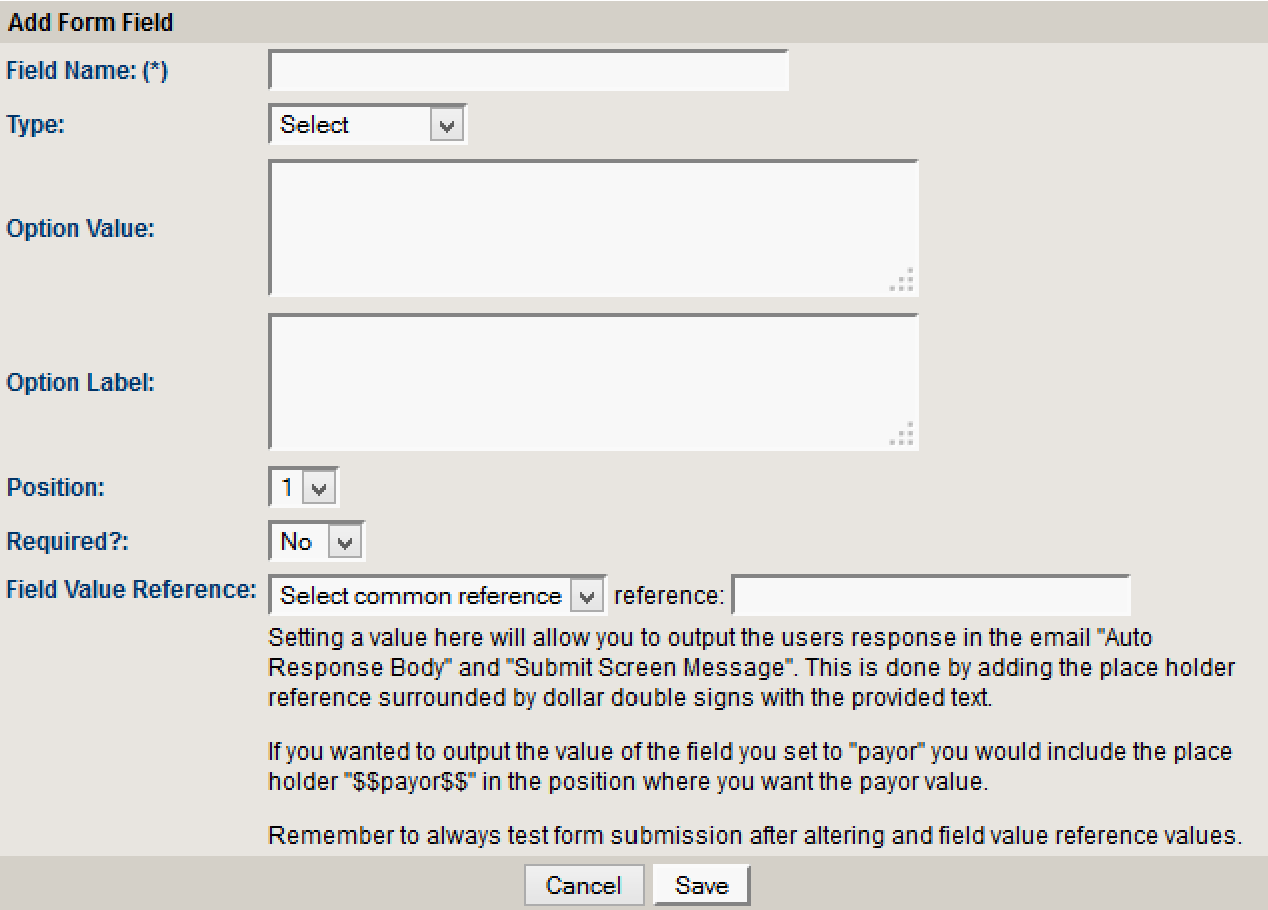
4.1.4 Creating a drop down field

Drop down fields allow public users to select one field from a multiple number of fields within a scrollable drop down menu.

1. ***Edit*** the required form and click on the ***New Field*** option.



> ***Note****: The **Add Form Field** form will load*



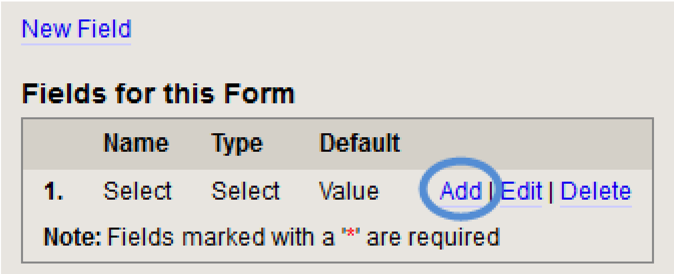
2. Enter a ***Field Name***. Typing a new ***Field Name*** will create a new field. Typing an existing ***Field Name*** will group certain form ***Types***, such as select boxes.

> ***Remember the Field Name you have entered for the field. This will be used to create the other options that will be available within your drop down field.***

3. Choose ***'Select'*** from the form ***Type*** field
4. Enter an ***Option Value*** for the field. This value will be the value of the option available within the drop down field and is the value saved to the database.
5. Enter an ***Option Label*** for the field. This label is the text displayed within the dropdown list and can be different to the ***Option Value***.
6. Select a position for the field within the form using the ***Position*** drop-down menu
7. Choose whether the field is mandatory using the ***Required*** drop-down menu
8. Select or enter a ***Field Value Reference***. Setting a value here will allow you to output the users response in the email "Auto Response Body" and "Submit Screen Message". This is done by adding the place holder reference surrounded by dollar double signs with the provided text. E.g. If you wanted to output the value of the field you set to "name" you would include the place holder "$$name$$" in the position where you want the name value.
9. Click the ***Save*** button to finish.

> ***You have only created one option within your drop down menu. For your multiple selection field- please continue to step 10 to create more values fields.***

10. To add additional options to the drop down menu click on the ***Add*** link next to the option you have created.



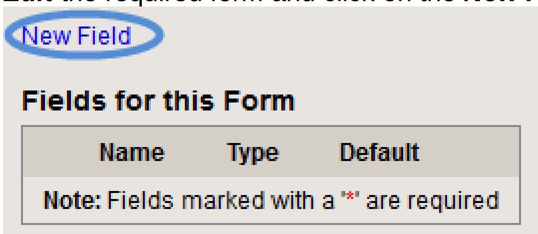
11. Repeat steps 1-9 (as above)
    a. Use the **exact same field name** for field name you create.
    b. Using the ***Add*** option will ensure that the field name is pre-populated in the ***Add Form Field*** form.

4.1.5 Creating a Radio Button/ Check Box List

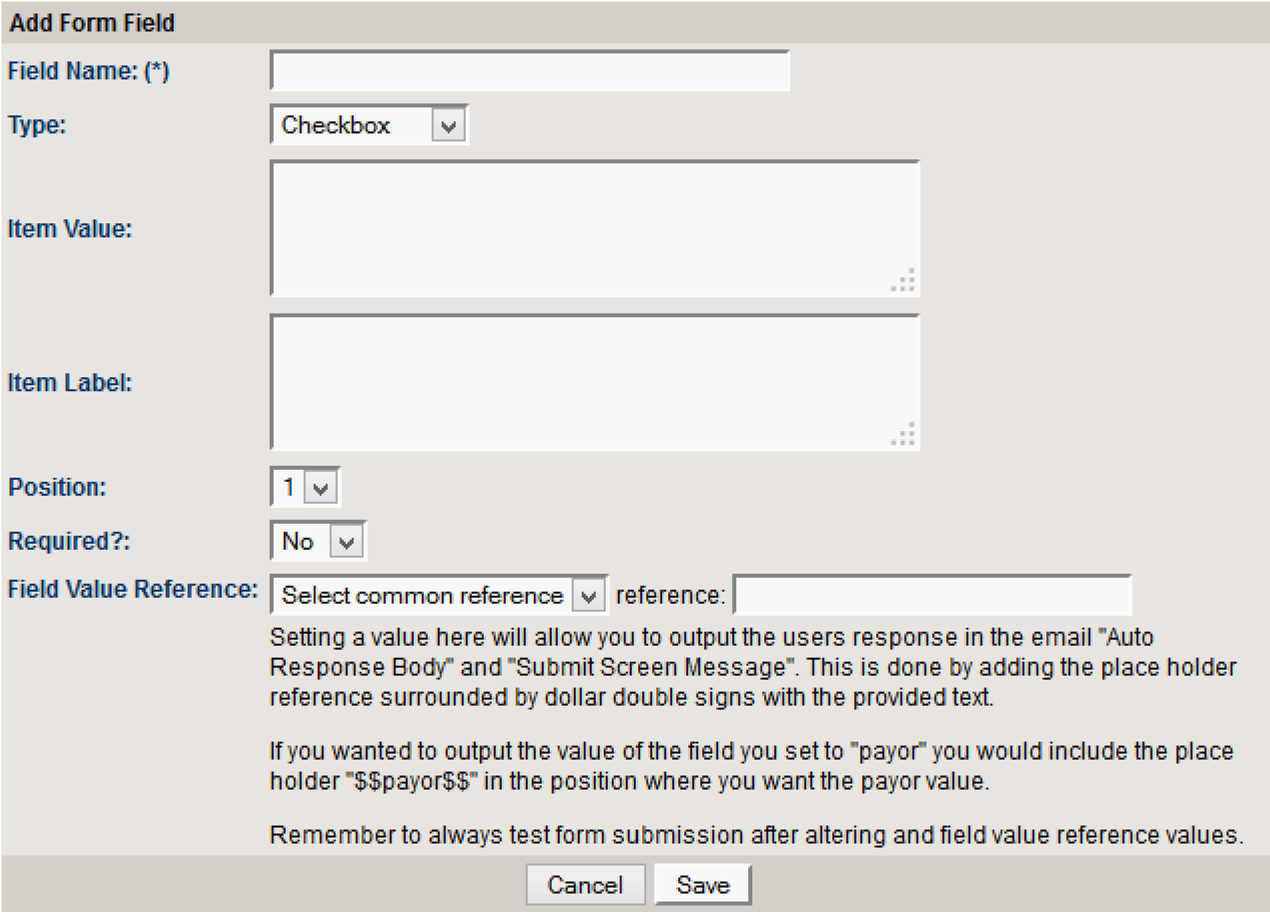
Radio Buttons: Allow the public user to select only one option from a set of predefined values that relate to one form question.

Check Boxes: Allow the public user to select multiple values that relate to one form question.

1. ***Edit*** the required form and click on the ***New Field*** option.



> ***Note****: The* ***Add Form Field*** *form will load*



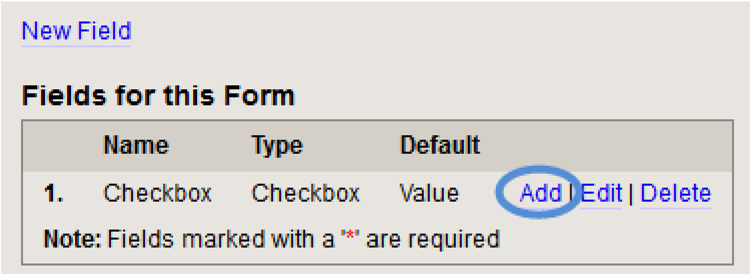
2. Enter a ***Field Name***. Typing a new ***Field Name*** will create a new field. Typing an existing ***Field Name*** will group certain form ***Types***, such as select boxes.

> ***Remember the Field Name you have entered for the field. This will be used to create the other options that will be available within your drop down field.***

3. Select ***Checkbox*** or ***Radio Button*** from the form ***Type***
4. Enter an ***Item Value*** for the field. This value will be the value of the item displayed on the public website and is the value saved to the database.
5. Enter an ***Item Label*** for the field. This label is the text displayed for the item on the public website and can be different to the ***Item Value***.
6. Select a position for the field within the form using the ***Position*** drop-down menu
7. Choose whether the field is mandatory using the ***Required*** drop-down menu
8. Select or enter a ***Field Value Reference***. Setting a value here will allow you to output the users response in the email "Auto Response Body" and "Submit Screen Message". This is done by adding the place holder reference surrounded by dollar double signs with the provided text. E.g. If you wanted to output the value of the field you set to "name" you would include the place holder "$$name$$" in the position where you want the name value.
9. Click the ***Save*** button to finish.

> ***You have only created one option within your list of radio buttons or checkboxes. Please continue to step 10 to create more values fields.***

10. To add additional items to the checkbox or radio buttons click on the ***Add*** link next to the item you have created.

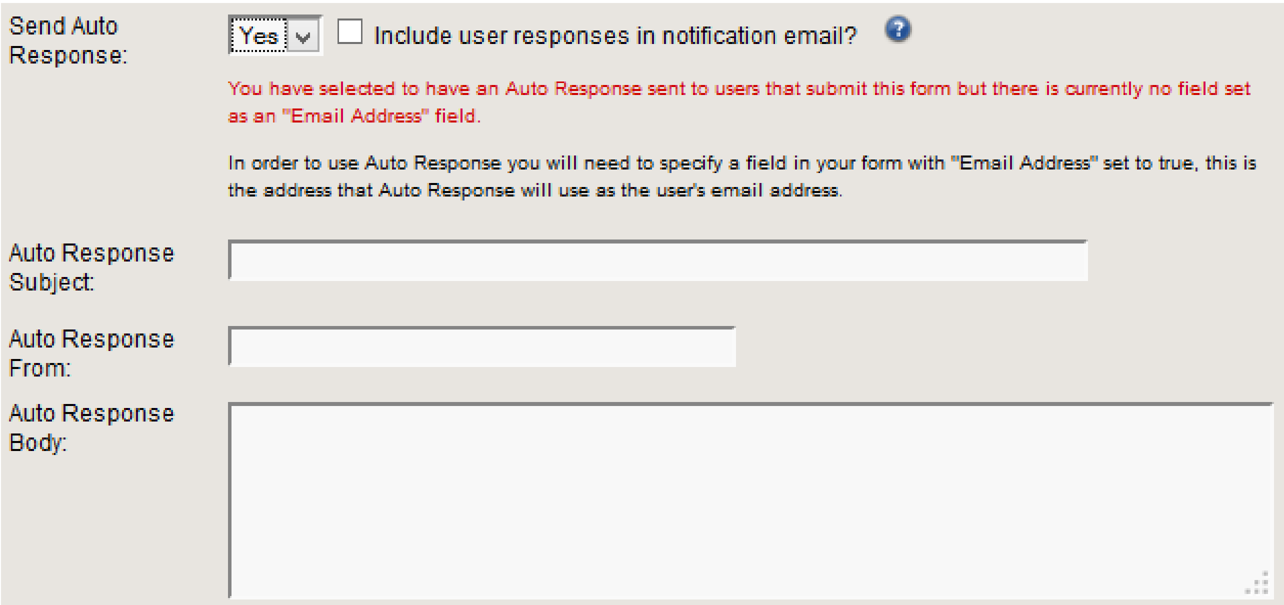


11. Repeat steps 1-9 (as above)
    a. Use the **exact same field name** for field name you create.
    b. Using the ***Add*** option will ensure that the field name is pre-populated in the ***Add Form Field*** form.

4.1.6 Setting up an Auto Responder for your form

The last step you may choose to take is to add an Auto responder to your form. As the name implies, an Auto Responder, automatically sends a response to the person sending the form.

1. Select ***Yes*** from the ***Send Auto Response*** drop-down menu



2. Choose whether you want to include the users responses in the Auto Response Email by checking the ***Include user responses in notification email?***
3. The Auto Response requires one form field to be set to an email address which is uses to send the response email to the user. If the form fields does not have an email field included and error message will be displayed.
4. Auto Response Subject - ***Enter*** a Subject or ***Title*** for your Response
5. Auto Response From - ***Enter*** the Auto Response from ***Email address.***
6. Auto Response Body - ***Type*** in a ***message*** that will be sent.
7.

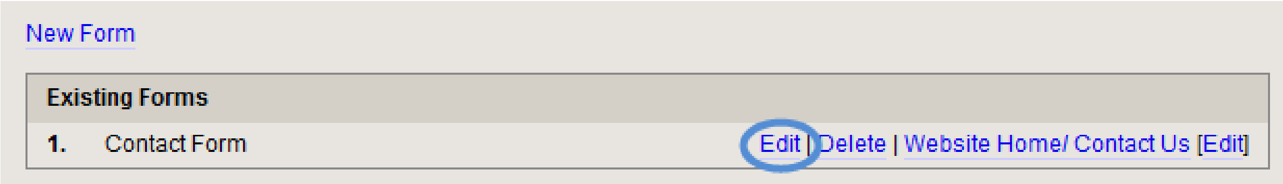
> ***Note****: If you would like to include any of the form fields in the Auto Response Email this can be done by adding the fields place holder reference surrounded by dollar double signs. E.g. If you wanted to output the value of the field you set to "name" you would include the place holder "$$name$$" in the position where you want the name value.*

8. Click the ***Update*** button to finish.

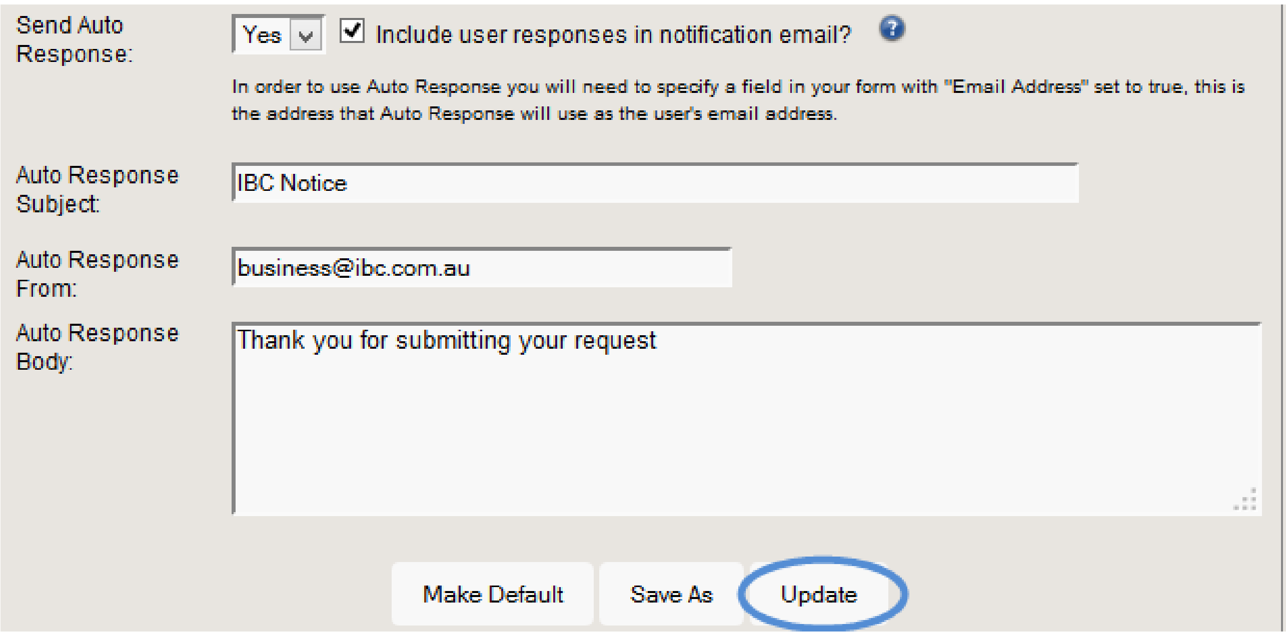
> ***Note****: Your Auto responder can be turned off at any time by changing the Auto Response option to No.*

4.1.7 Editing an Existing Dynamic Form

1. To edit an existing dynamic form, simply click on the ***Edit*** option for the appropriate form.

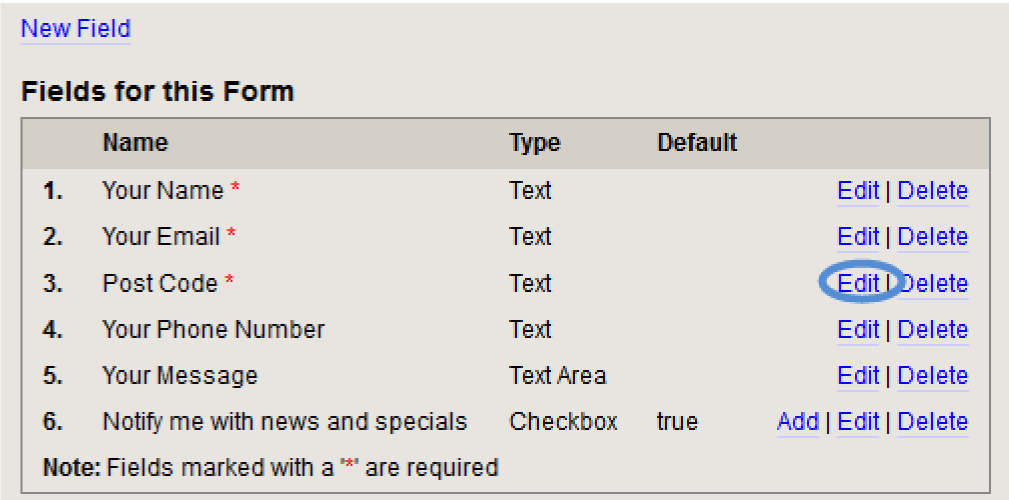


2. Make any necessary changes to the form details.
3. Click on the ***Update*** button to finish.



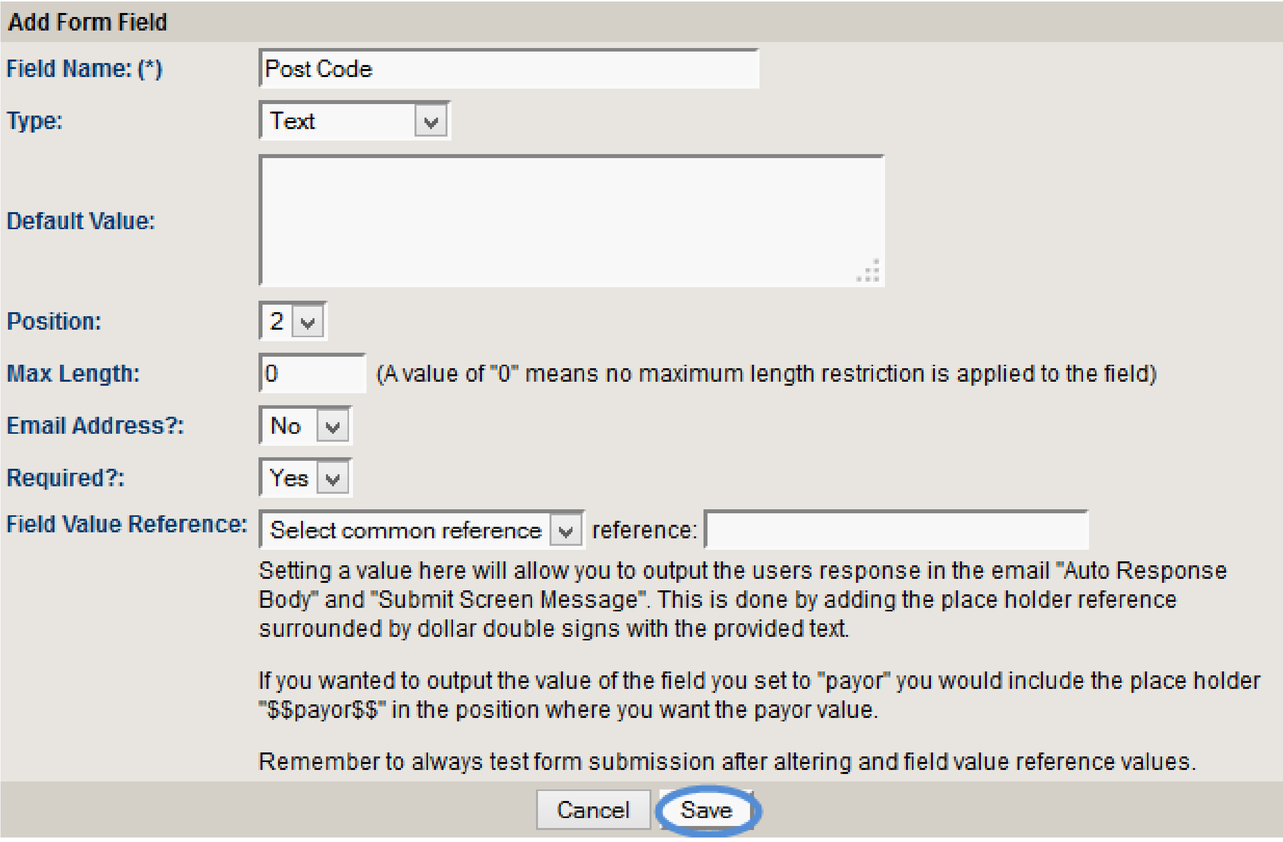
4.1.8 Editing Form Fields

1. To edit existing dynamic form field elements, click on the ***Edit*** option for the desired field.



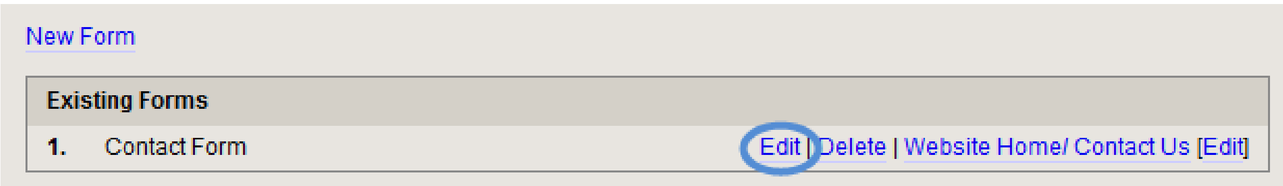
2. Make any desired changes to the form field.

3. Click on the ***Save*** button to finish

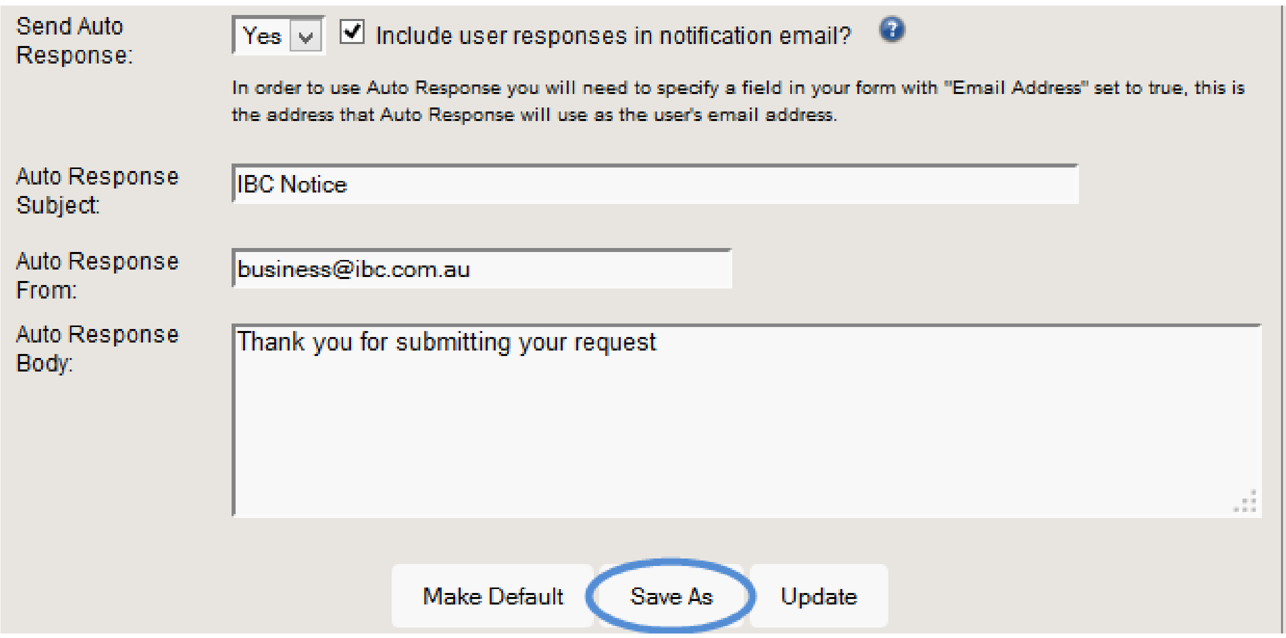


4.1.9 Making a Copy of a Form

1. To create a copy of an existing dynamic form, click on the ***Edit*** option for the form you wish to copy.



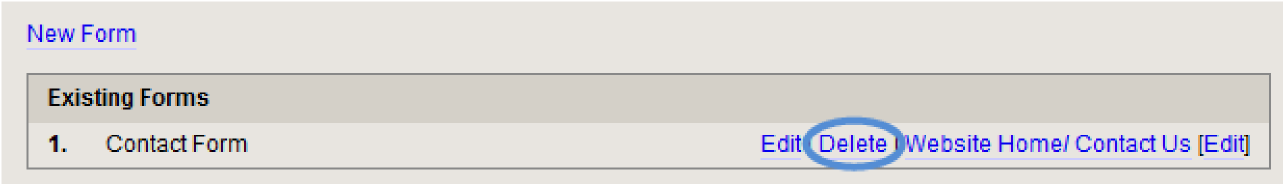
2. Make any required changes to the form values.
3. Click the ***Save As*** button to finish



> **Note:** *A copy of the form will now be created.*

4.1.10 Deleting a Form

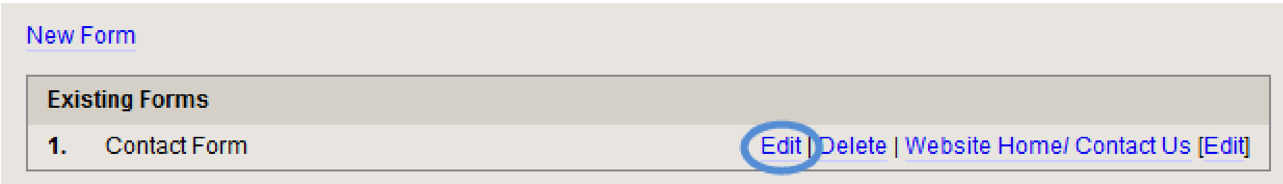
1. Click on the ***Delete*** option for the appropriate form.



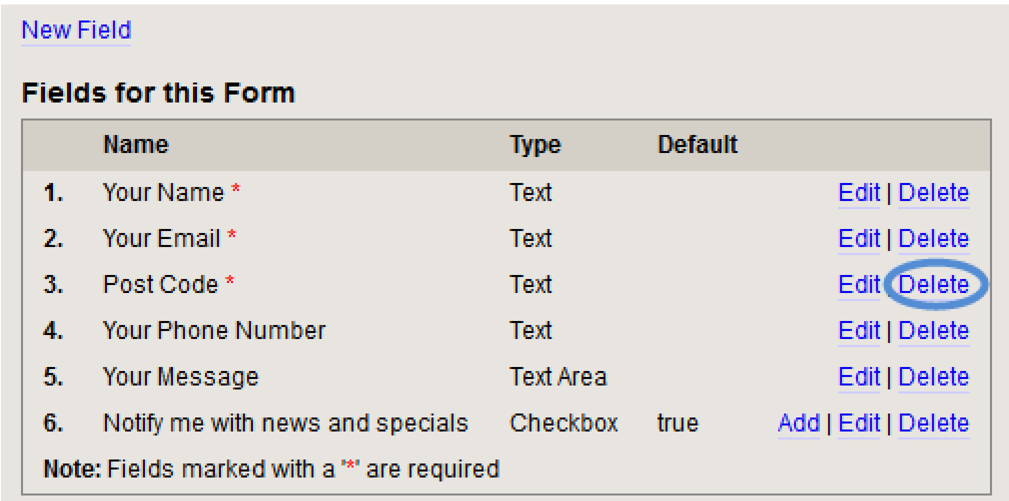
2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified form, click on the ***OK*** button to finish or click the ***Cancel*** button to stop the deletion of the form.

4.1.11 Deleting Individual Form Fields within a Form

1. Click on the ***Edit*** option for the appropriate form.



2. Click on the ***Delete*** option for the field you would like to remove

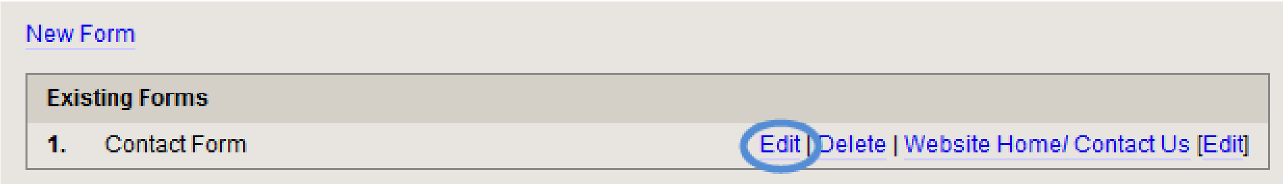


3. You will be presented with a confirmation box asking if you are sure you wish to delete the specified form field, click on the ***OK*** button to finish or click the cancel button to stop the deletion of the form field.

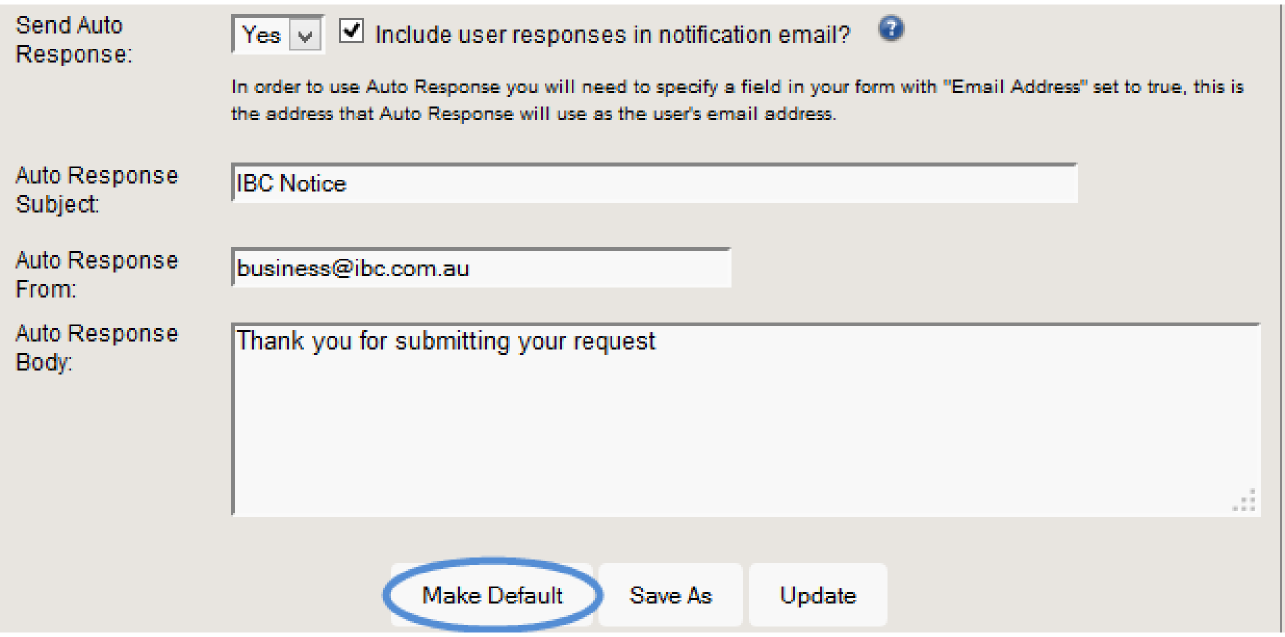
4.1.12 Making a form a Default Form

The Dynamic Forms system allows you to specify the default form for the system.

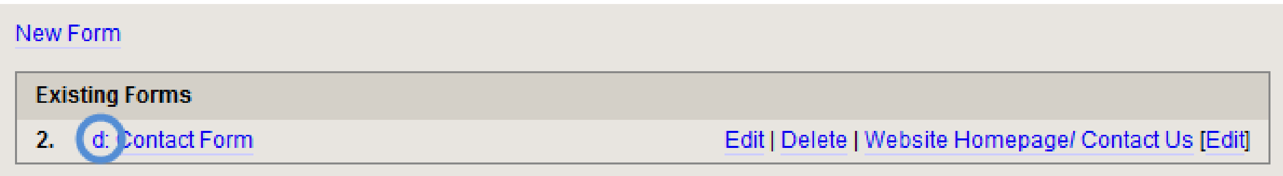
1. Click on the ***Edit*** option for the appropriate form.



2. Click on the ***Make Default*** button.



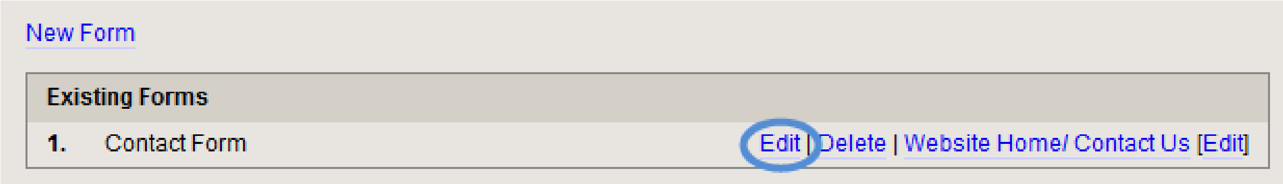
3. A d: will appear before the default form on the form listing page.



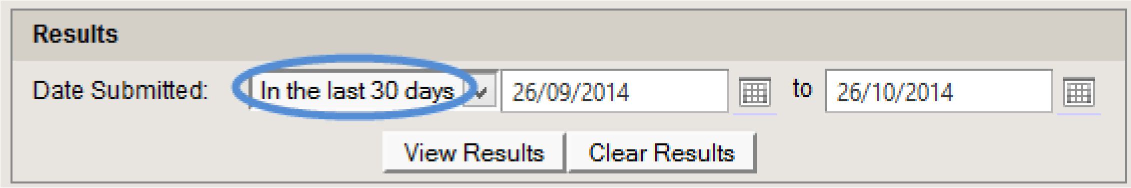
4.1.13 Extracting Results from a Dynamic Form

If you chose to save the results of the Dynamic Form to the database then you will be able to view the results for the Dynamic Form and export it to an excel spreadsheet.

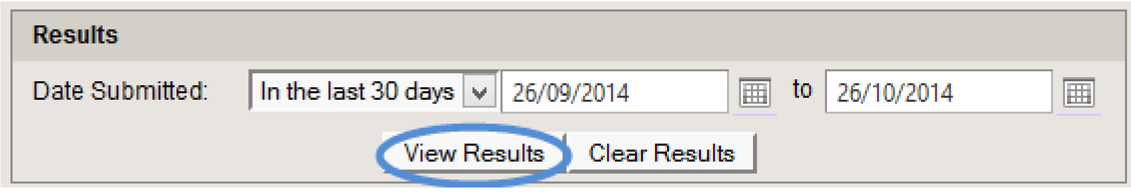
1. Click on the ***Edit*** option for the appropriate form.



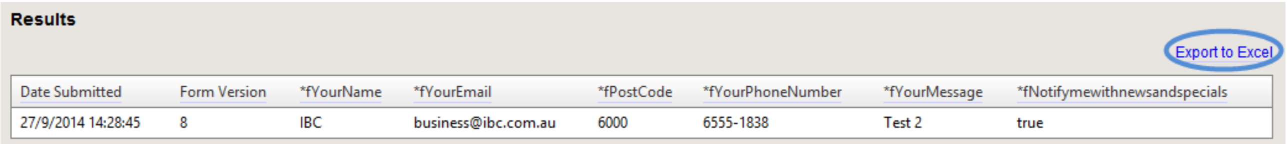
2. In the ***Results*** section choose the timeframe that you wish to view the results for from the ***Date Submitted*** drop down (or specify your own timeframe using the date fields).



3. Click ***View Results*** to see the results for the chosen timeframe.



4. The results will be displayed on the screen.



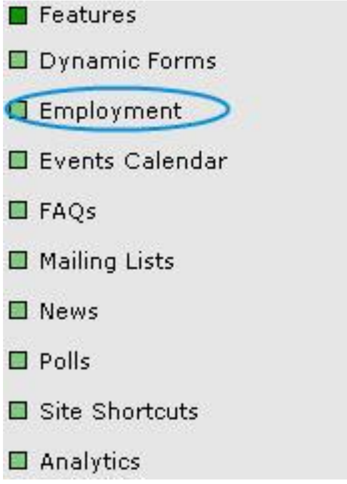
5. To export the results click on the ***Export to Excel*** link.

4.2 Employment

The Employment feature gives administrators the ability to advertise job vacancies through the public website.

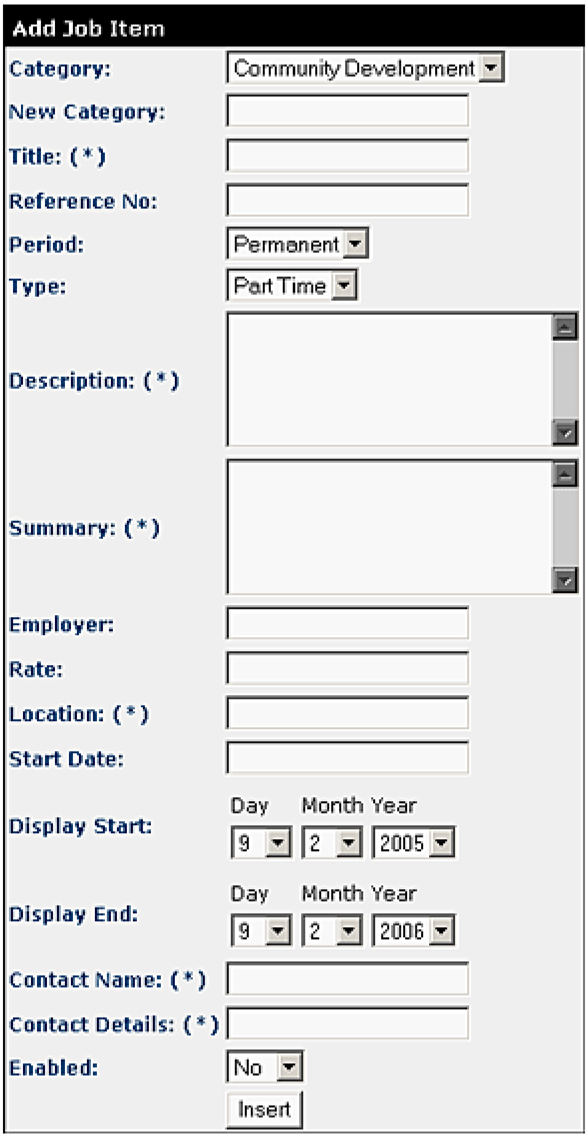
4.2.1 Add a New Job

1. Click on the ***Employment*** option under ***Features*** in the left hand navigation.



2. Click on the ***Add a Job Item*** button.

3. The '*Add Job Item'* form will be displayed.



4. Choose an existing ***Category*** for the job you wish to advertise from the drop down menu or enter a new category in the text box provided below.
5. Enter a title for the position in the ***Title*** box.
6. Enter an internal reference number for the position in the ***Reference No*** box.
7. Select an appropriate employment period from the ***Period*** drop down menu.
8. Choose a vacancy type from the ***Type*** drop down menu.
9. Enter a job description in the ***Description*** box.
10. Enter a brief description in the ***Summary*** box
11. Enter the name of the organisation or department in the ***Employer*** box.
12. Enter a salary rate in the ***Rate*** box. This could be hourly rate, biweekly salary or annual salary.
13. Enter a work location for the position in the ***Location*** text box. This may be a geographical location or an internal department.
14. Enter a start date of employment in the ***Start Date*** box.
15. Select the date you want the advertisement to appear on the website from the ***Display Start*** date menu.
16. Select the date you want the advertisement to finish displaying on the website from the ***Display End*** date menu
17. Enter the name of the person to be contacted for the advertised position in the ***Contact Name*** box
18. Enter the details of the person to be contacted in the ***Contact Details*** box. You may want to enter the person's contact number or email.
19. Set ***Enabled*** to "*Yes*" to display the position in the selected location.
20. Click the ***Insert*** button to finish.

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the Module.*

Follow the next steps to modify the pages template and publish your feature to the public site.

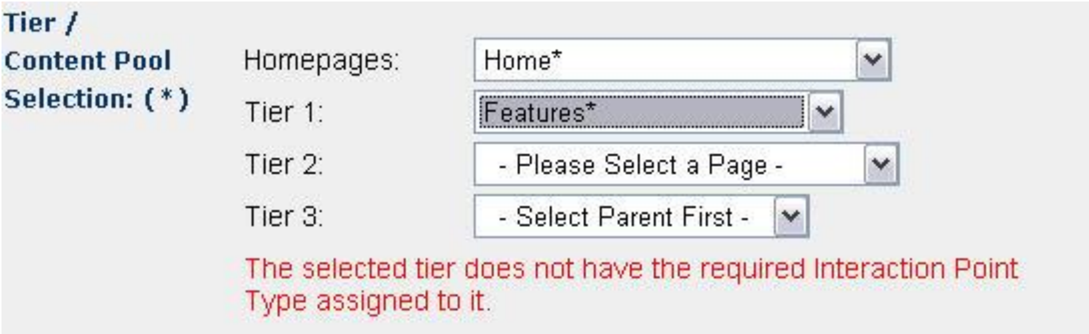
4.2.2 Publishing your Employment feature on the Public Site

The page you wish to place your feature on must have the required feature IP type within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for an IP Type or Feature to be located.

When creating your features tier locations, a message will display if the pages template does not support the selected IP type. *"The selected tier does not have the required Interaction Point Type assigned to it."*

1. Find the content item you wish your feature to be displayed on

   a. Select ***Administer this tier element*** to take you directly to the tiers administration page.



   <u>Or</u>

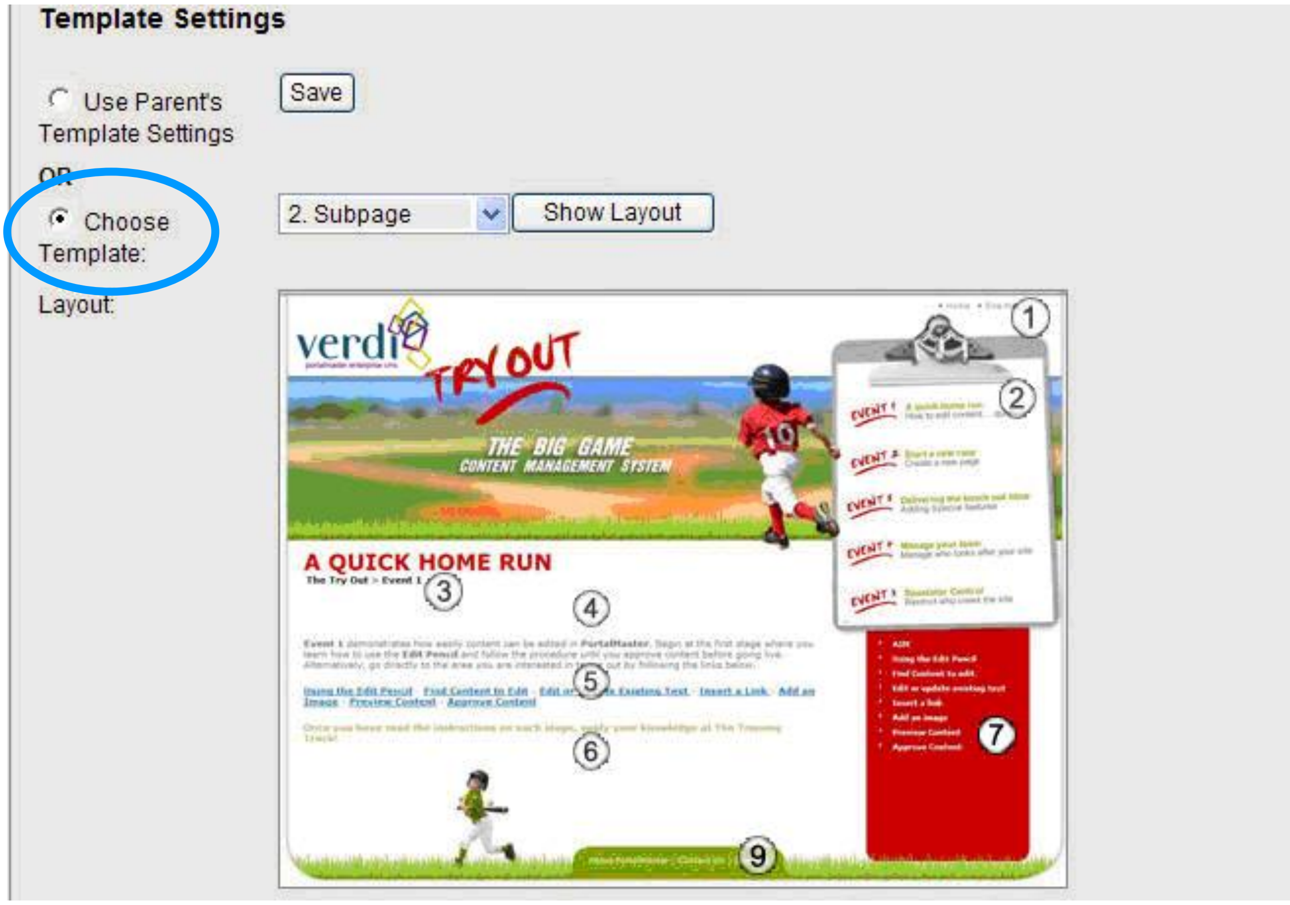
   c. From the Site Structure left navigation, select the page you wish the feature to be displayed on.

   d. Select the ***Template Settings*** Tab

2. Select the ***Choose Template*** radio button, and select the required pages template from drop down menu.

3. Select ***Show Layout*** button, and select the required pages template from drop down menu.

4. The following screen will load:



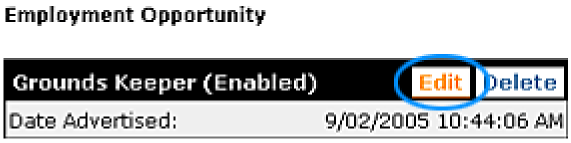
5. Select which section of the template you wish your feature to display by clicking on the relevant drop down field. Find your feature item and select.

6. Select the ***Preview/ Set Options*** button to save your changes.

> *Your feature will now be displayed within the page on the public site.*

4.2.3 Edit a Job

1. Click on the ***Edit*** option for the appropriate job.



2. Make any required changes.
3. Click on the ***Update*** button to finish

4.2.4 Delete a Job

1. Click on the ***Delete*** option for the desired job.

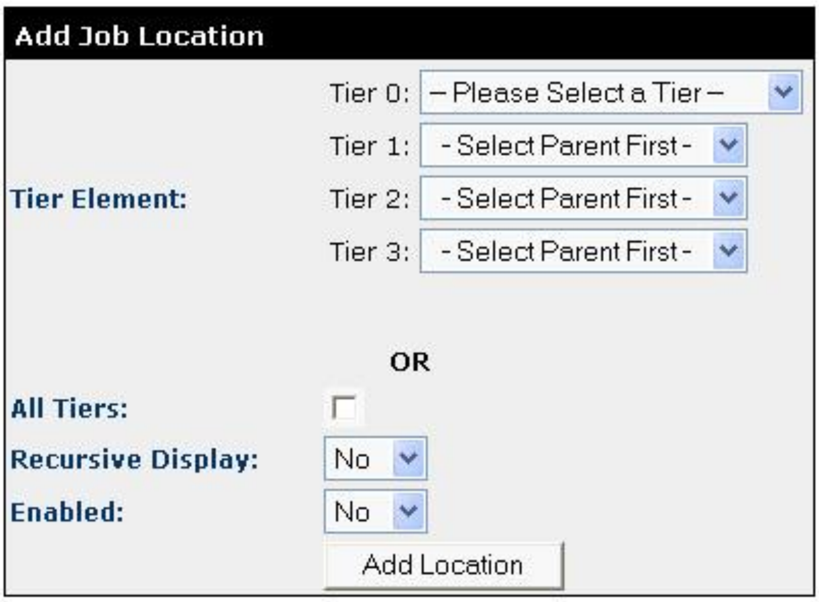
2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified Job, click on the ***OK*** button to finish

4.2.5 Adding a Job Location

A job vacancy can be displayed on multiple locations within the website.

1. To add a Job Location to a specific job, ***Edit*** the required job and click on the ***Add a Job Location*** button.

2. The '*Add Job Location'* form will load



3. There are two options available for selecting a job location: To select a specific tier location, use the ***Tier Element*** drop-down menus.
4. You can choose to display the job vacancy on all tiers that have the Employment module assigned by checking the ***All Tiers*** check box.
5. Set ***Recursive Display*** to "*Yes*" if you want the job vacancy to recur in the subsequent levels of the selected Tier. This is not applicable if you select a Tier 3 location or if you have the ***All Tiers*** option checked.
6. Set ***Enabled*** to "*Yes*" to display the job on the website.
7. Select the required ***Contact Publisher*** if available. This option is only available if a contact has been assigned to the tier you wish to display the vacancy on and should be contacted before enabling on the public site.
8. Click on ***Add Location*** to finish.

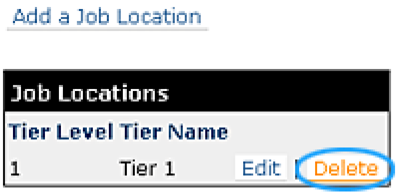
4.2.6 Editing a Job Location

1. Click on the ***Edit*** option for the appropriate Job Location.

2. Make any necessary changes.
3. Click on the ***Update Location*** button to finish

4.2.7 Deleting a Job Location

1. Click on the ***Delete*** option for the appropriate job location.

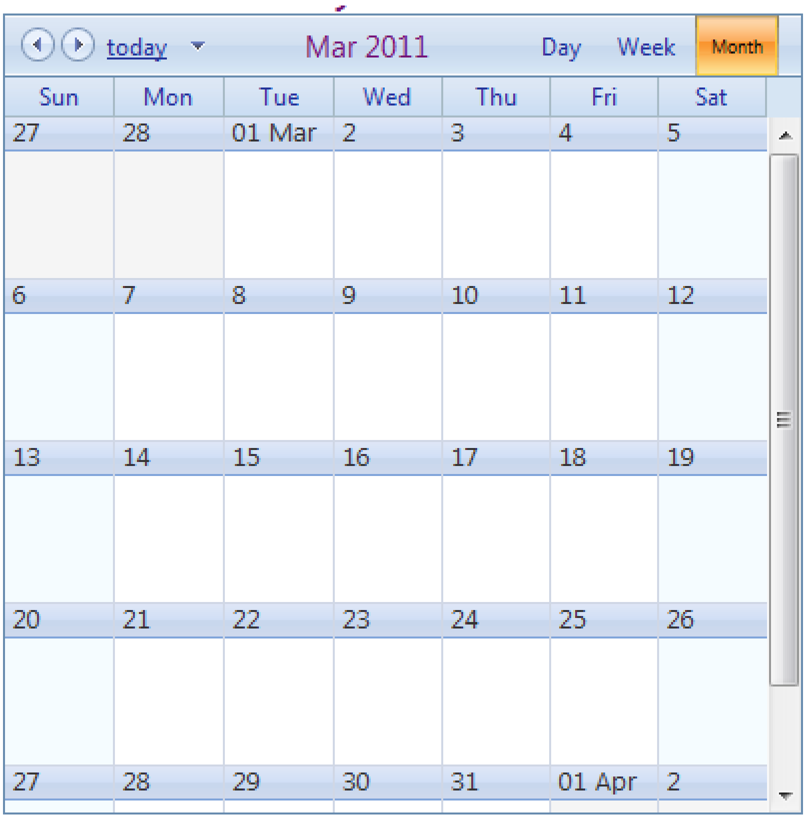


2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified Job Location, click on the ***OK*** button.

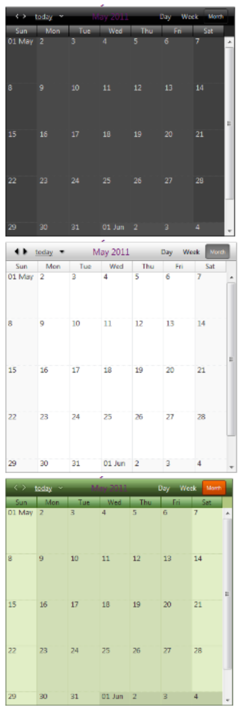
4.3 Events Calendar

You may use the Verdi Events Calendar module to manage and display information about upcoming events on the website.

Events can be displayed in a calendar format as below, or in a list and /or you can display Event Teasers.

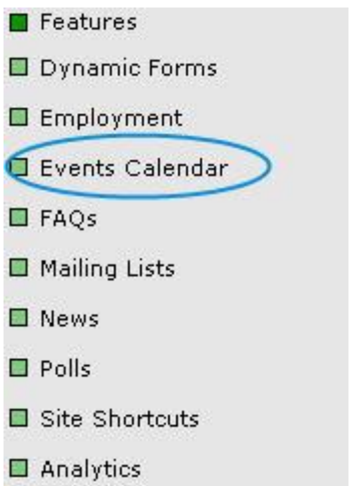


Just a few of the alternative standard colour schemes.

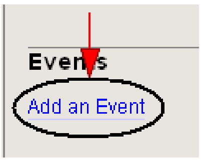


4.3.1 Adding an Event

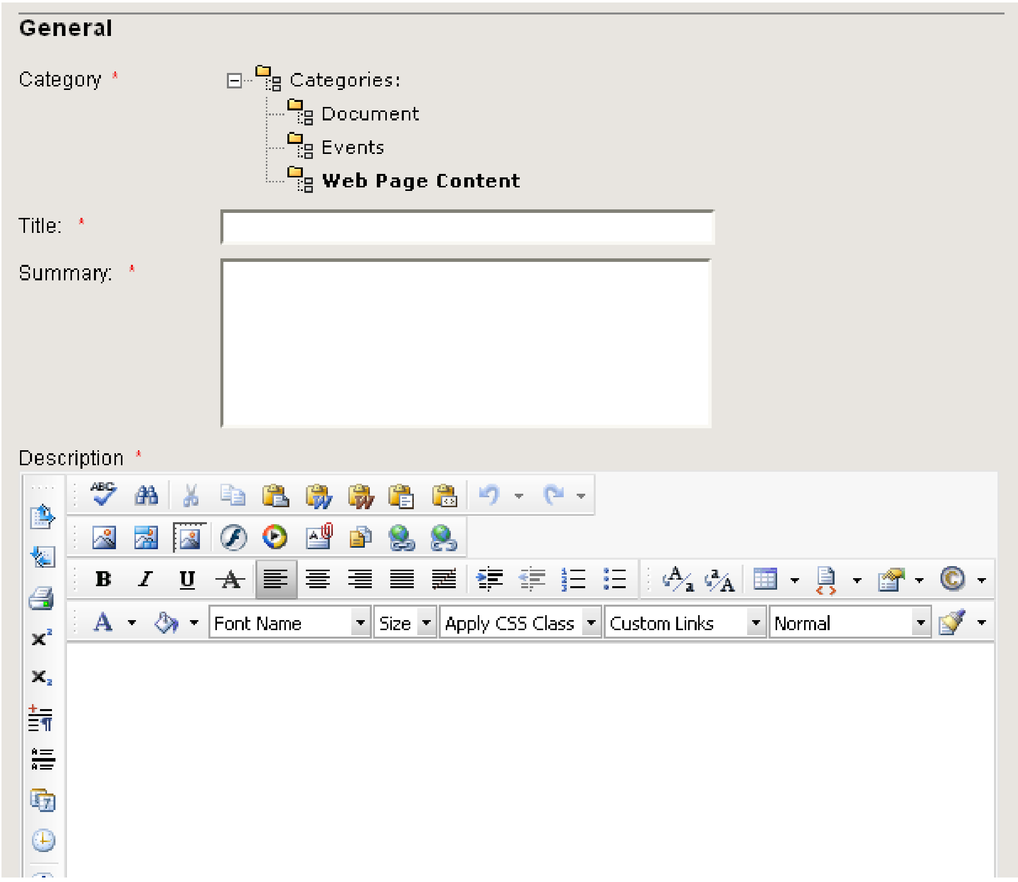
1. Click on the ***Events Calendar*** option under ***Features***.



2. Click on the ***Add an Event*** button.



3. The '*Insert Events'* form will be displayed.



4. **Category:** Select an existing Category using the ***Category*** Tree. If the category does not exist it can be added through Categories Administration as described in "Administering Content Categories"

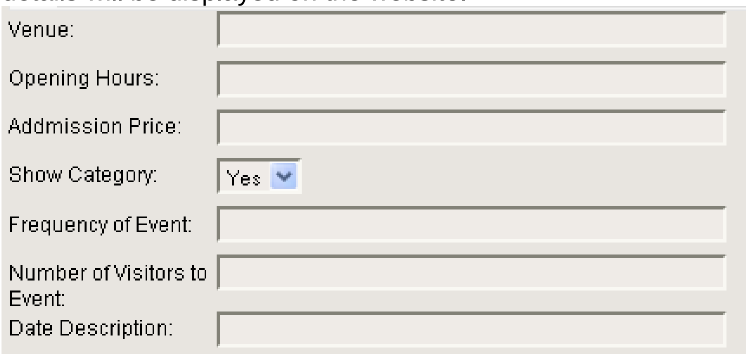
5. **Title:** Enter a title for the event in the ***Title*** text box. This will be displayed as the main title for the event.

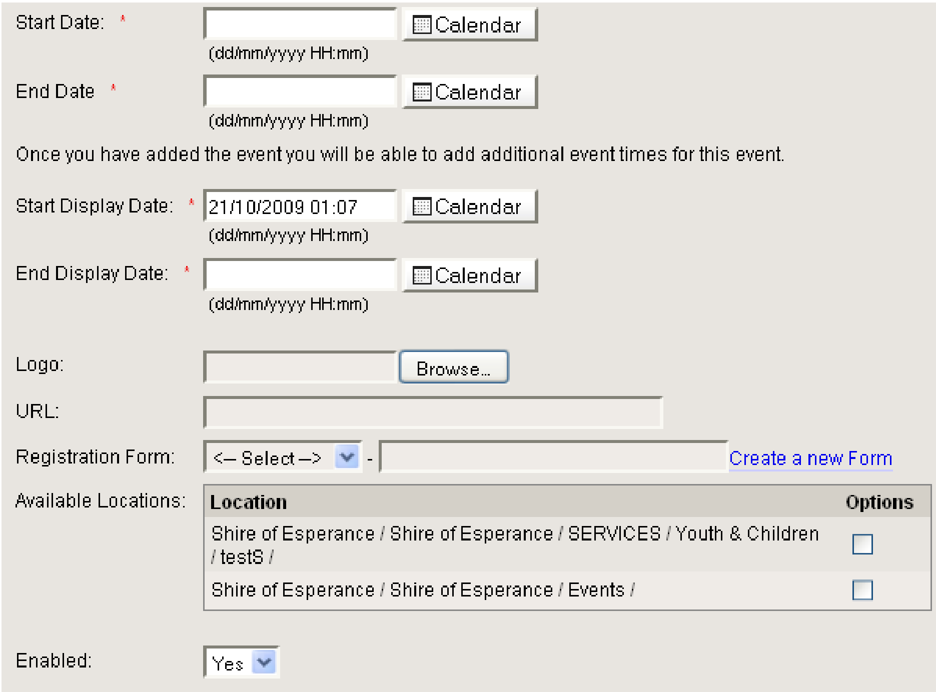
6. **Summary:** Enter a brief ***Summary*** for the Event. The summary will be shown within the public sites search results.

7. **Description:** Enter a description for the event, adding images and links as required in the ***Description*** WYSIWYG Editor. (refer to the WYSIWYG Editor User Guide for further reference)

8. Optional fields: Complete the ***Venue***, ***Opening Hours***, ***Admission Price, Show Category***, ***Frequency of Event***, ***Number of Visitors*** and ***Date Description*** text boxes as required. These

details will be displayed on the website.





9. Using the ***Start Date*** calendar select the actual start date and time of the event. Additional event times may be added once the event has been created.

10. Using the ***End Date*** calendar select the actual end date and time of the events. The ***End Display Date*** will default to the event ***End Date*** for convenience but may be changed if required.

11. Using the ***Start Display Date*** calendar select the date of the event to be displayed on the website.

12. Using the ***End Display Date*** calendar set the date to stop showing the event on the website.

13. If desired, use the ***Browse*** button to upload a ***Logo*** from your local or network drive.

14. Enter a website ***URL*** if required that is associated with the event.

15. Select a ***Registration Form*** from the drop down list of ***Dynamic Forms***. You can create a new form by entering a ***Title*** for the form in the text box next to the drop down list and click the "***Create a new form***" link. This will create a new ***Dynamic Form*** with a title only and the actual form field will need to be created through the ***Dynamic Forms*** feature.

16. The ***Available Locations*** lists the pages that already have the **Calendar Events** module within the pages template. Select the Check boxes for the pages where you would like this Event to appear. When you save the event an ***Event Display Location*** will be added for each of the ticked locations.

If there are no Display Locations listed here, there are no pages on your site that *support the Module. Follow the steps to modify the pages template and publish your feature to the public site.*

17. Set the ***Enabled*** option to '*Yes*' to allow the event to display in the designated locations.
18. Click on the ***Save*** button to finish

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the Module. Follow the next steps to modify the pages template and publish your feature to the public site.*

4.3.2 Publishing your Events feature on the Public Site

The page you wish to place your feature on must have the required feature module within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for a module or Feature to be located. See section 2.6 of this User Guide.

4.3.3 Editing an Event

1. Click on the ***Edit*** option for the appropriate event.

Web Page Content/

Title	Live Date	Archive Date	Last Editor	Enabled	Options
IBC Testing	30/11/2009	30/11/2010	Admin Default User	True	edit | del
IBC Testing Copy	30/11/2009	30/11/2010	Admin Default User	True	edit | del

2. Make the necessary changes on the ***General*** tab.
3. Click on the ***Save*** button to finish

4.3.4 Deleting an Event

1. Click on the ***Delete*** option for the appropriate event.

Events/

Title	Options
Annual General Meeting 2008	edit | del
tttt	edit | del
test document	edit | del

2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified event, click on the ***OK*** button.

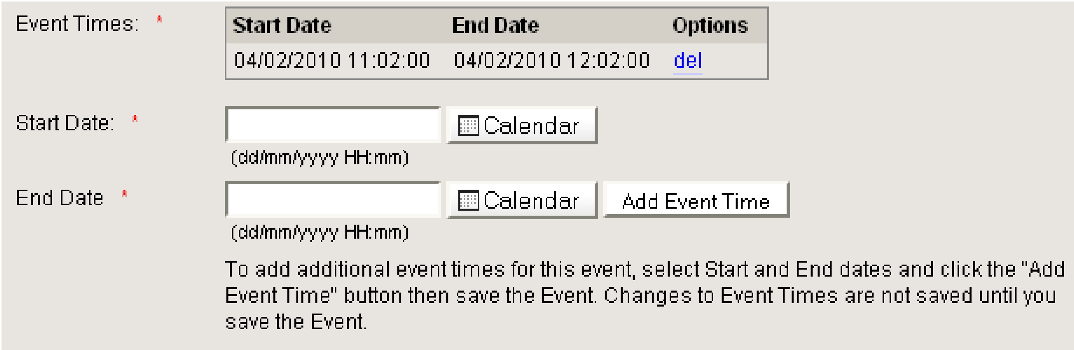
4.3.5 Adding additional Event Times to an existing Event

1. Click on the ***Edit*** option for the appropriate event.

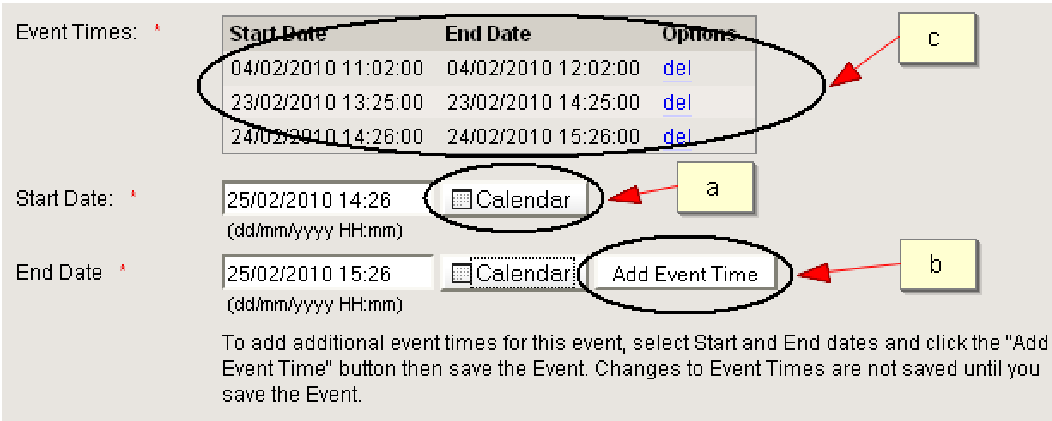
Web Page Content/

Title	Live Date	Archive Date	Last Editor	Enabled	Options
IBC Testing	30/11/2009	30/11/2010	Admin Default User	True	edit | del
IBC Testing Copy	30/11/2009	30/11/2010	Admin Default User	True	edit | del

2. Scroll to the event times section on the **General Tab**.



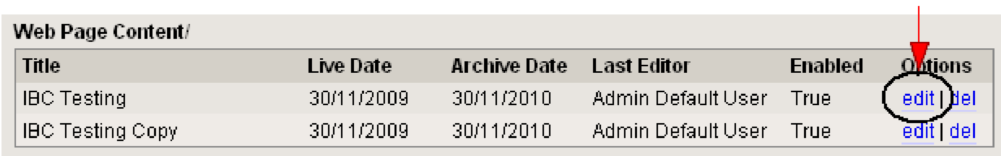
1. Add one or more event times by doing the following: (shown in figure below)
    a. Select start and end dates using the calendars or typing directly into the appropriate fields.
    b. Click the **Add Event Time** button to add an event time to the list of event times (c).
    c. Review the list of event times and save the event when you are ready to save your changes



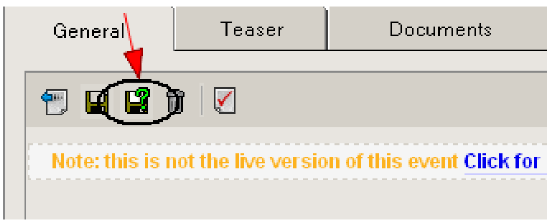
Your changes to the Event Times are not saved until you save the Event.

4.3.6 Copying an existing Event to a new Event

3. Click on the ***Edit*** option for the appropriate event.



4. On the ***General*** tab click the ***Save As*** button.

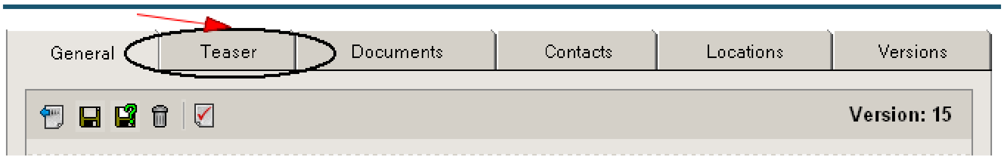


A copy of the selected Event will be saved and the new event will be displayed in edit mode.

5. Make any necessary changes and click the ***Save*** button to finish.

4.3.7 Adding an Event Teaser

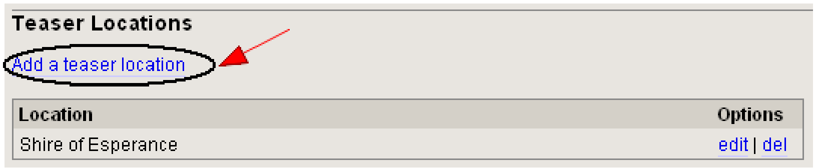
2. ***Edit*** the required event and click on the ***Teaser Tab***.



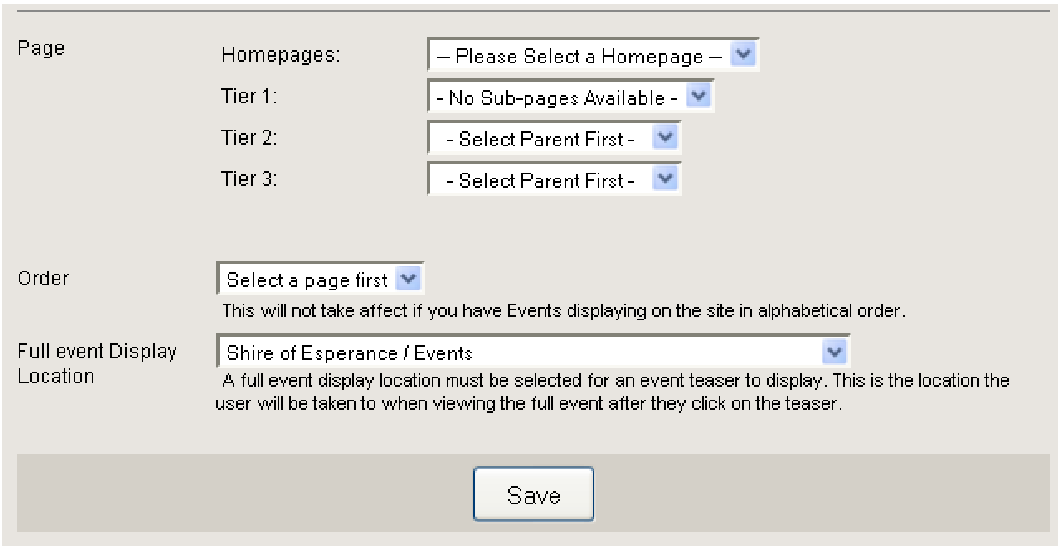
3. **Teaser:** Enter a ***Teaser*** for the event, adding images and links as required in the Teaser WYSIWYG Editor. (refer to the WYSIWYG Editor User Guide for further reference)

4. Click the ***Save*** button to save the ***Teaser***.

5. ***Teaser Display Locations*** can be added at the bottom of the page. To add a Teaser Location click the Add a teaser location link.



6. The page will display the "*Add Display Location*" form.



7. Use the ***Display Tier*** drop down menu to select an appropriate location on the website for the event teaser to be displayed.

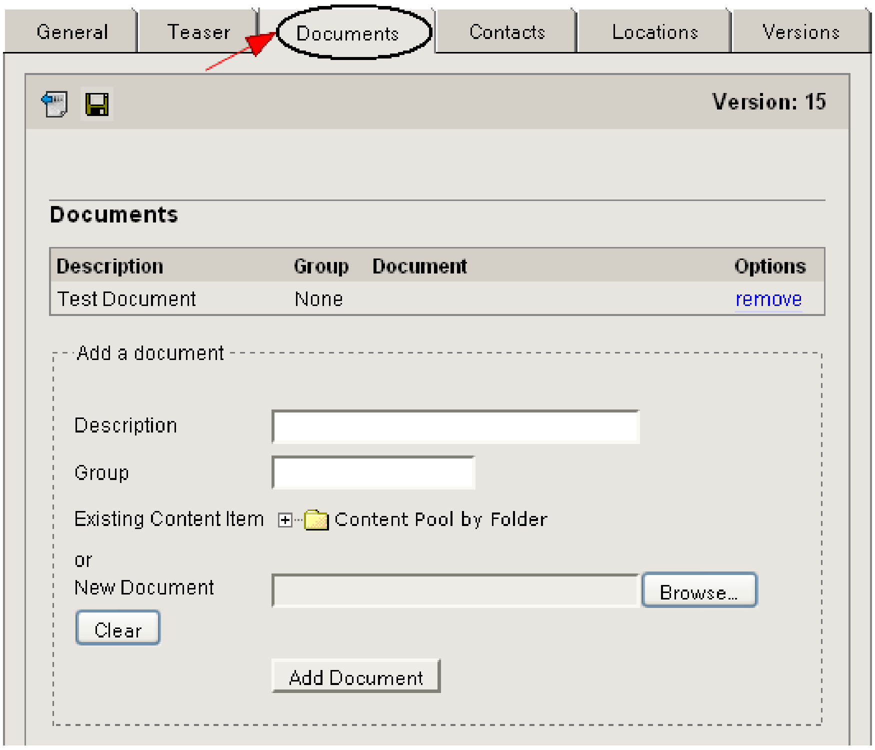
8. Select a display order and the location of the full event.

9. Click the ***Save*** button to finish.

Your feature will now be displayed within the page on the public site.

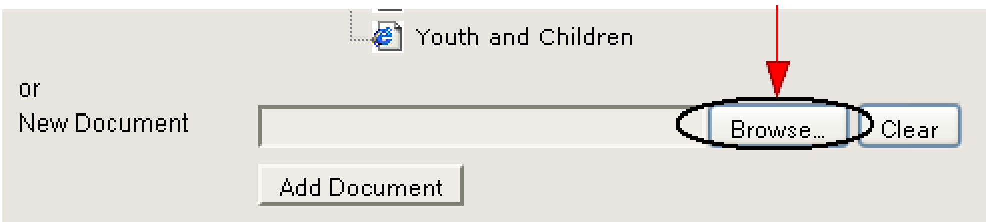
4.3.8 Adding Documents to the Event

1. ***Edit*** the required event and select the ***Documents*** tab.



2. Enter a ***Description*** and ***Group*** for the document to be added and select the document from the tree structure of existing content items.

3. If the document you wish to add to the event does not already exist in the content pool you can add a new document by clicking the browse button and selecting the document from your computer.



4. Click the ***Add Document*** button. This will add the select document to the list of documents linked to this Event. If you have selected a new document this will add your new document to the list of linked documents.

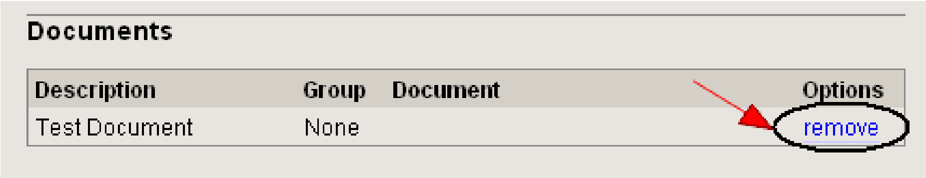
5. Click the ***Save*** button to save the selected document links for this event.

Your document will now be displayed within the event on the public site.

4.3.9 Remove a Document from an Event

1. ***Edit*** the required event and select the ***Documents*** tab.

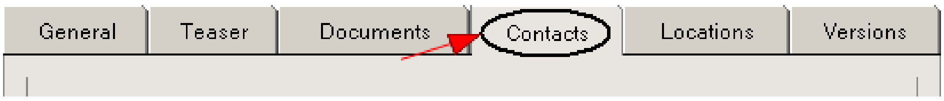
2. Click the ***remove*** link next to the document you wish to remove.



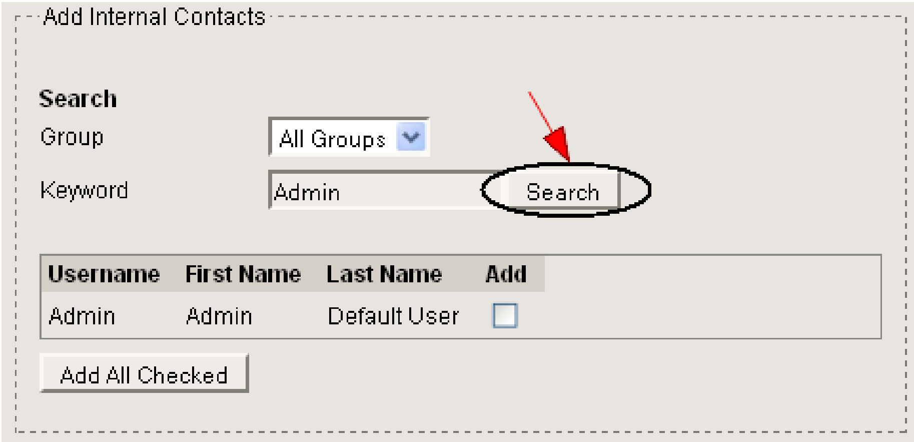
3. Click the Save button to update the event with your changes.

4.3.10 Adding internal contacts to an Event

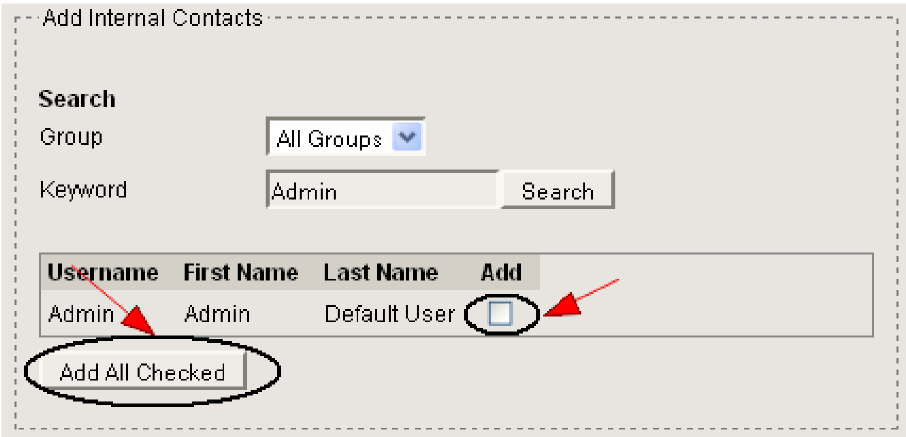
1. ***Edit*** the required event and select the ***Contacts*** tab.



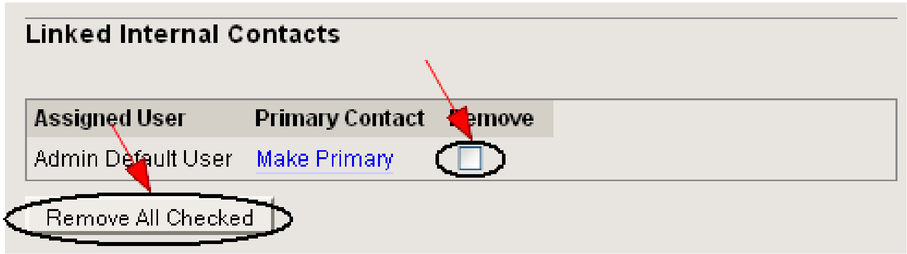
2. Select a ***Group***, enter a ***Keyword*** and click the ***Search*** button to search internal users.



3. Check the ***Add*** checkbox for each user you wish to add and click the "*Add All Checked*" button.



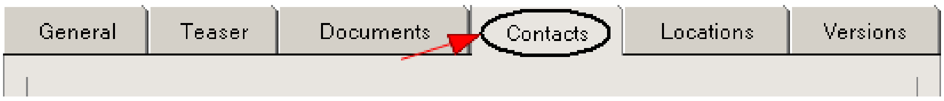
4. Contacts can be removed from the ***Linked Internal Contacts*** list by checking the ***Remove*** checkbox next to the contacts name and clicking the "*Remove All Checked*" button.



Your contact will now be displayed within the event on the public site.

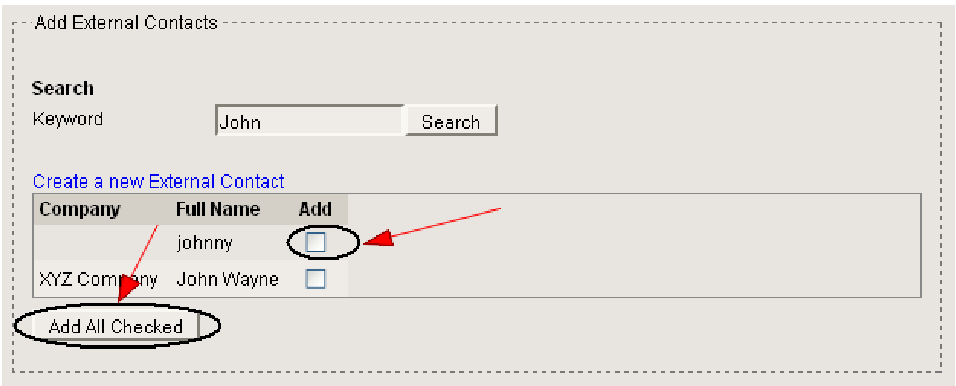
4.3.11 Adding an External Contact to an Event

1. ***Edit*** the required event and select the ***Contacts*** tab.

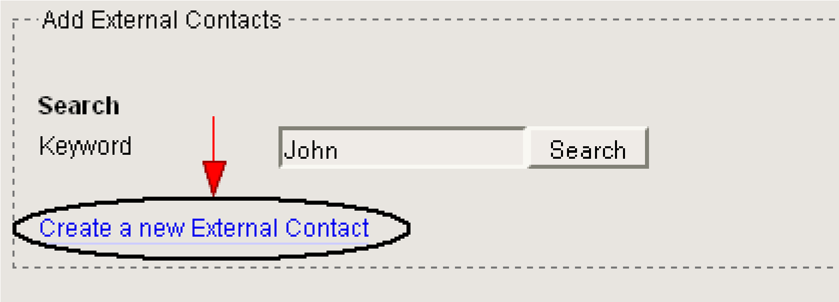


2. Scroll to the "*Add External Contacts*", enter a ***Keyword*** in the External Contacts search field and click the ***Search*** button.

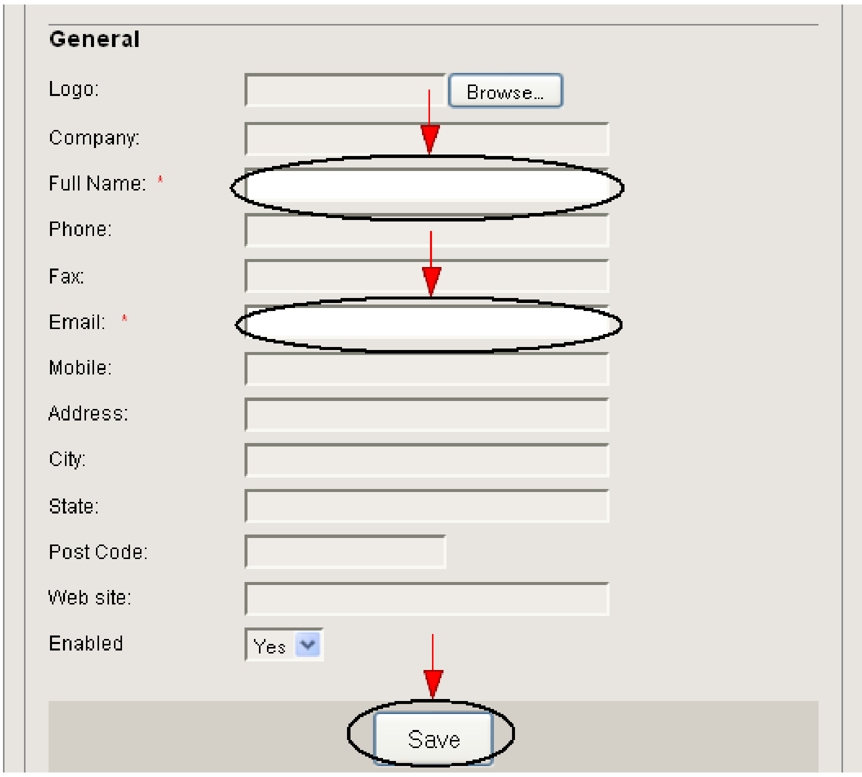
3. Check the Add check boxes of the existing External Contacts to link to the event and click the "Add All Checked" button.



4. If the ***External Contact*** does not already exist you can create a *new* ***External Contact*** by clicking "*Create a new External Contact*".



5. Complete the required fields on the “*Create New External Contact*” form and click the **Save** button.

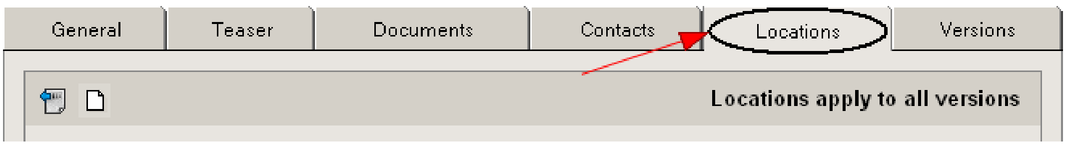


*The External Contact will be added to the system but will not have been linked to your event. After you have save the new External Contact you will be taken back to the **Contacts** tab of your event where you can search External Contacts and link the new contact you just created to your event as described in point 2 above.*

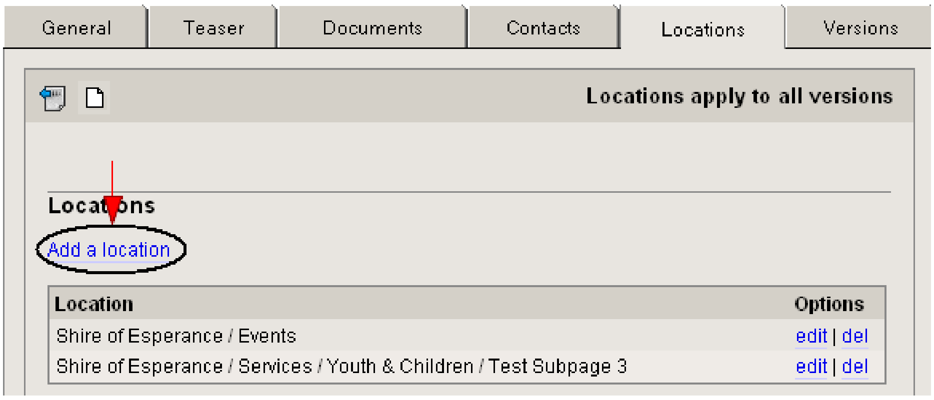
6. Search ***External Contact*** and add the desired contacts to your event.

4.3.12 Adding an Event Display Location

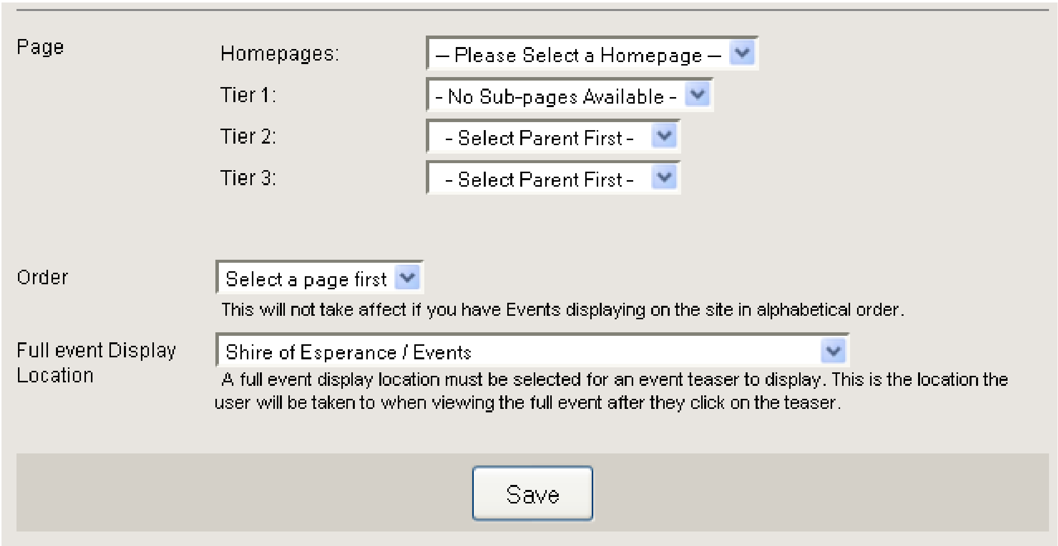
1. ***Edit*** the required event and click on the ***Locations*** tab.



2. Click “*Add a Location*”.



The page will display the "*Add Display Location*" form.



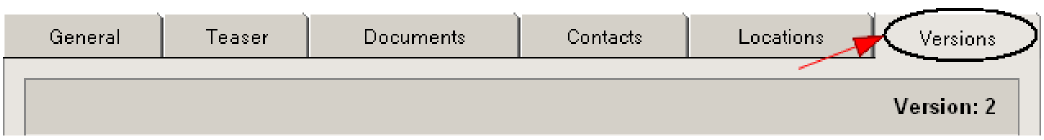
3. Use the ***Display Tier*** drop down menu to select an appropriate location on the website for the event teaser to be displayed.

4. Select a display order and the location of the full event.

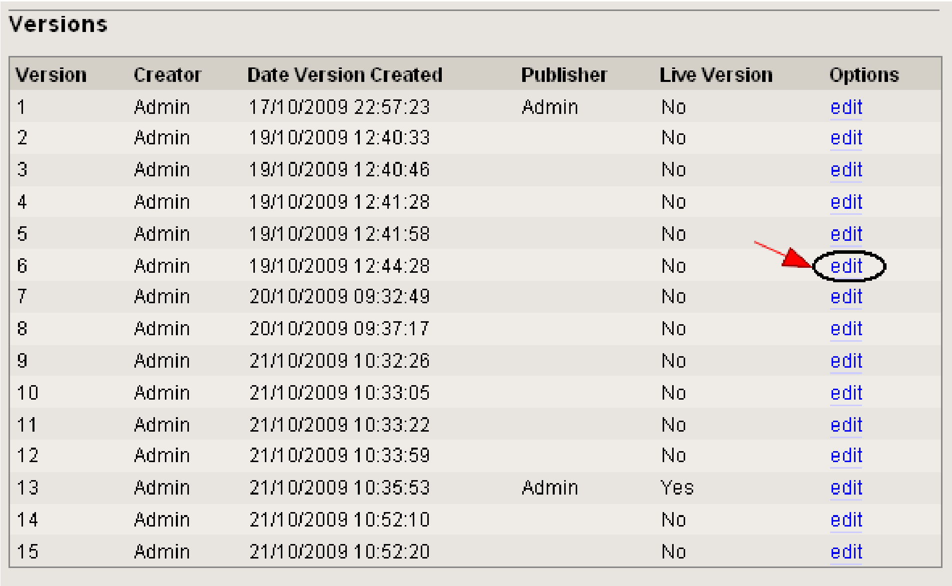
5. Click the ***Save*** button to finish.

4.3.13 Versions

1. The Events Calendar module is version controlled. To view all versions of an event, ***Edit*** the required event and click on the ***Versions*** tab.



All versions will be listed and can be edited by clicking the edit link for the version you wish to edit. Saving changed to a version will not change the version but will create a new version with your changes.

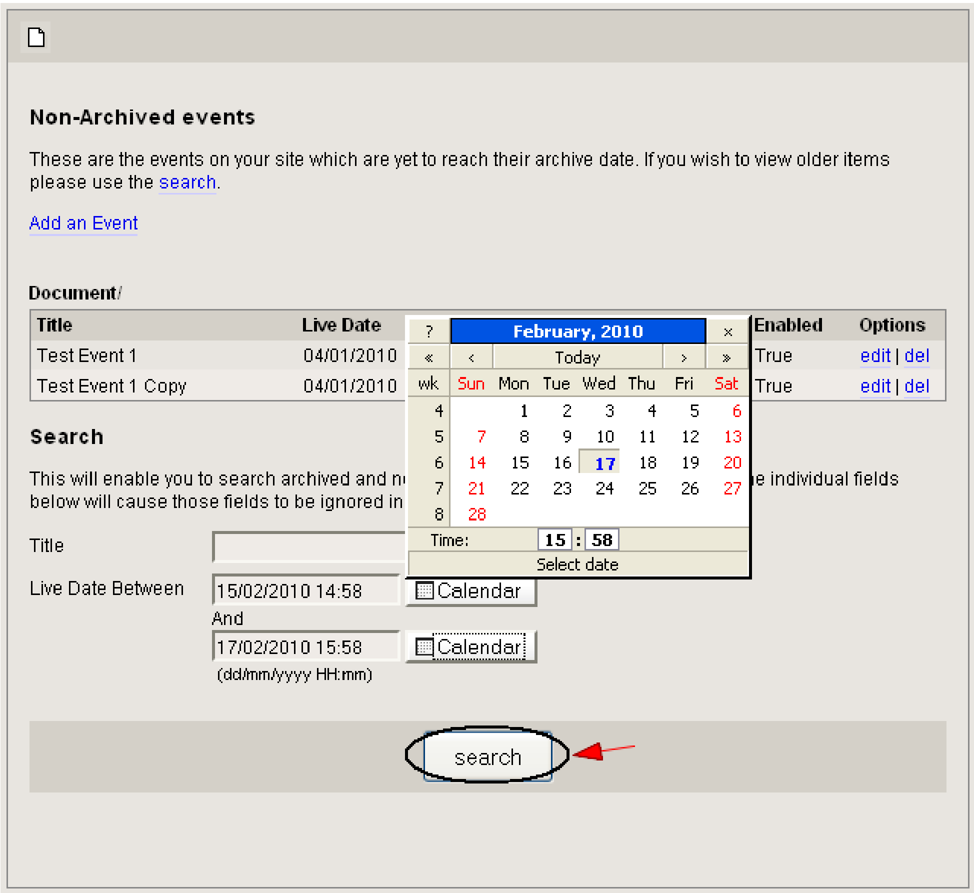


Versions

Version	Creator	Date Version Created	Publisher	Live Version	Options
1	Admin	17/10/2009 22:57:23	Admin	No	edit
2	Admin	19/10/2009 12:40:33		No	edit
3	Admin	19/10/2009 12:40:46		No	edit
4	Admin	19/10/2009 12:41:28		No	edit
5	Admin	19/10/2009 12:41:58		No	edit
6	Admin	19/10/2009 12:44:28		No	edit
7	Admin	20/10/2009 09:32:49		No	edit
8	Admin	20/10/2009 09:37:17		No	edit
9	Admin	21/10/2009 10:32:26		No	edit
10	Admin	21/10/2009 10:33:05		No	edit
11	Admin	21/10/2009 10:33:22		No	edit
12	Admin	21/10/2009 10:33:59		No	edit
13	Admin	21/10/2009 10:35:53	Admin	Yes	edit
14	Admin	21/10/2009 10:52:10		No	edit
15	Admin	21/10/2009 10:52:20		No	edit

4.3.14 Searching the Event Archive

1. Select the desired date range to search on using the ***Search*** form.



2. Click ***Search***, to reload the events list containing all events with a start date that falls within the selected date range.

Search Results

Title	Live Date	Archive Date	Options
Another test event Copy	10/02/2010	15/02/2010	edit | del
Another test event	10/02/2010	15/02/2010	edit | del

4.4 Frequently Asked Questions (FAQ’s)

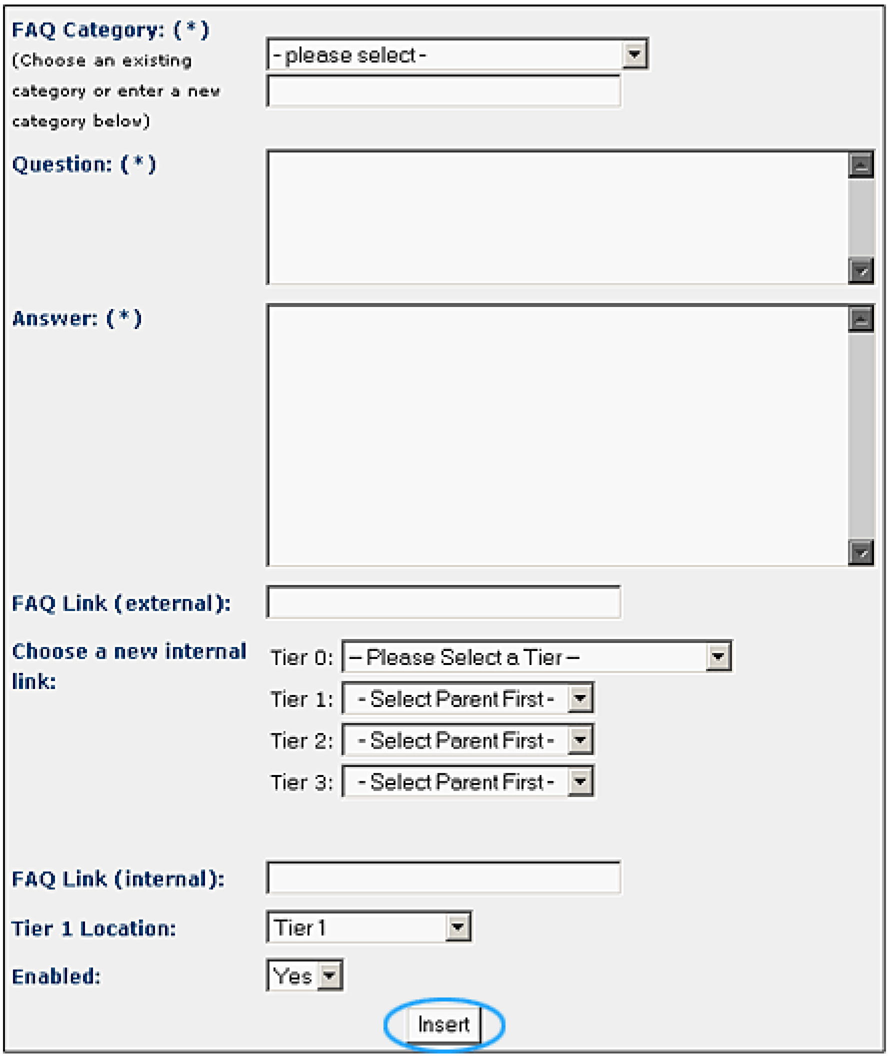
Verdi enables you to add a selection of Frequently Asked Questions (FAQ’s) and the associated answers that are relevant to the website.

4.4.1 Adding an FAQ

1. Click on the ***FAQ’s*** option under ***Features***.

2. Click on the ***Add a new FAQ*** button.

3. The “FAQ” form will be displayed.



4. Select an existing ***FAQ Category*** from the drop-down menu or enter a new category in the text box below.
5. Enter the ***Question*** you would like to display.
6. Enter the ***Answer*** to the question you would like to display.
7. If the FAQ has a related external link to another website, enter the website address into ***FAQ Link (external)***.

> ***Note:*** *When entering a website address in the **FAQ Link (external)**, remember to insert "http://" in front of the link.*
> *E.g. http:///www.ibc.com.au*

8. If the FAQ has a related internal link to another page within the website, use the tier drop-down menu to select the internal link. The ***FAQ Link (Internal)*** text box will automatically fill your selection.
9. Select a display for the FAQ using the ***Tier 1 Location*** drop-down menu. FAQ's can only be assigned to display on a Tier 1 page.
10. Set ***Enabled*** to '*Yes*' to activate the display location.
11. Click on ***Insert*** to finish.

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the module. Follow the next steps to modify the pages template and publish your feature to the public site.*

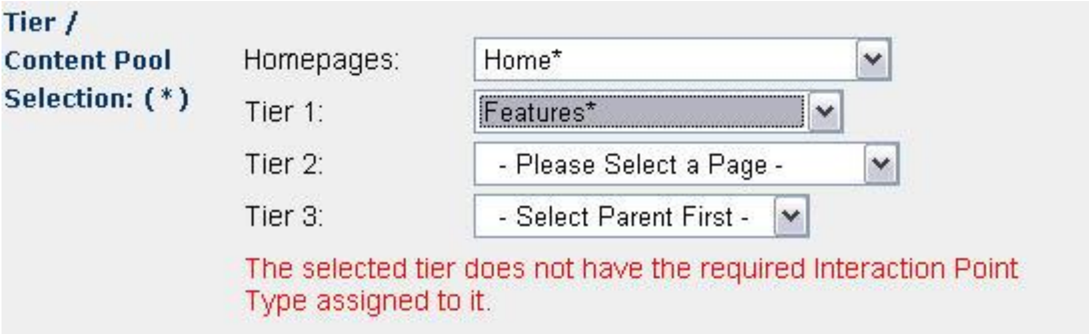
4.4.2 Publishing your FAQ feature on the Public Site

The page you wish to place your feature on must have the required feature module within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for a module or Feature to be located.

When creating your features tier locations, a message will display if the pages template does not support the selected module. *"The selected tier does not have the required Interaction Point Type assigned to it."*

1. Find the content item you wish your feature to be displayed on

   a. Select ***Administer this tier element*** to take you directly to the tiers administration page.



   <u>Or</u>

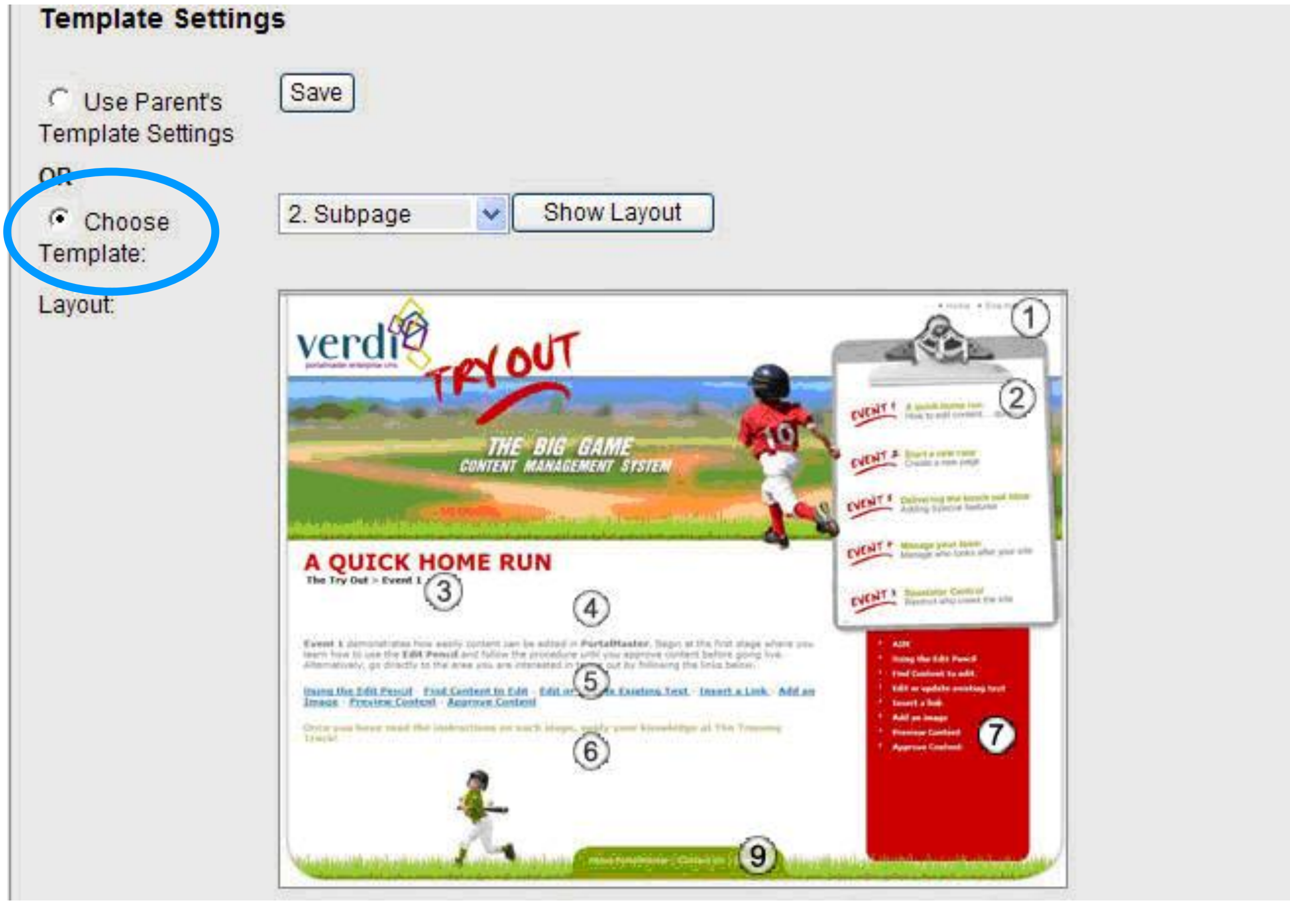
   a. From the Site Structure left navigation, select the page you wish the feature to be displayed on.

   b. Select the ***Template Settings*** Tab

2. Select the ***Choose Template*** radio button, and select the required pages template from drop down menu.

3. Select ***Show Layout*** button, and select the required pages template from drop down menu.

4. The following screen will load:



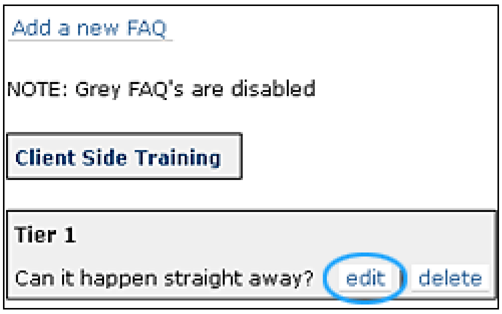
5. Select which section of the template you wish your feature to display by clicking on the relevant drop down field. Find your feature item and select.

6. Select the ***Preview/ Set Options*** button to save your changes.

Your feature will now be displayed within the page on the public site.

4.4.3 Editing an FAQ

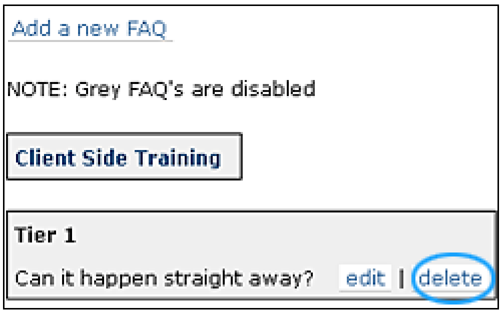
1. Click on the ***Edit*** option for the appropriate FAQ.



2. Make the necessary changes.
3. Click on the ***Update*** button to finish.

4.4.4 Deleting an FAQ

1. Click on the ***Delete*** option for the appropriate FAQ.



2. The FAQ will be deleted from the list.

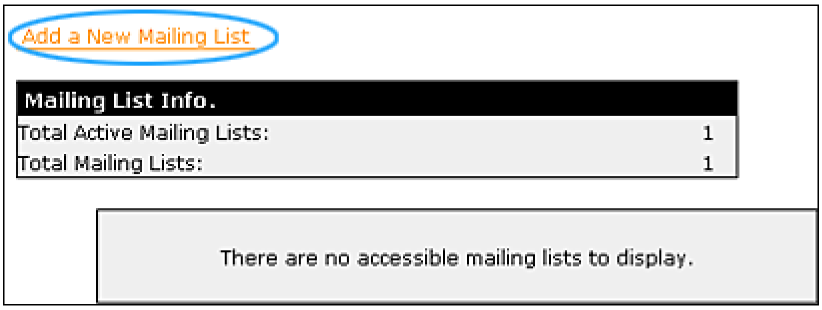
4.5 Mailing Lists

Mailing Lists allow you to keep users of the site informed on a variety of topics with regular postings.

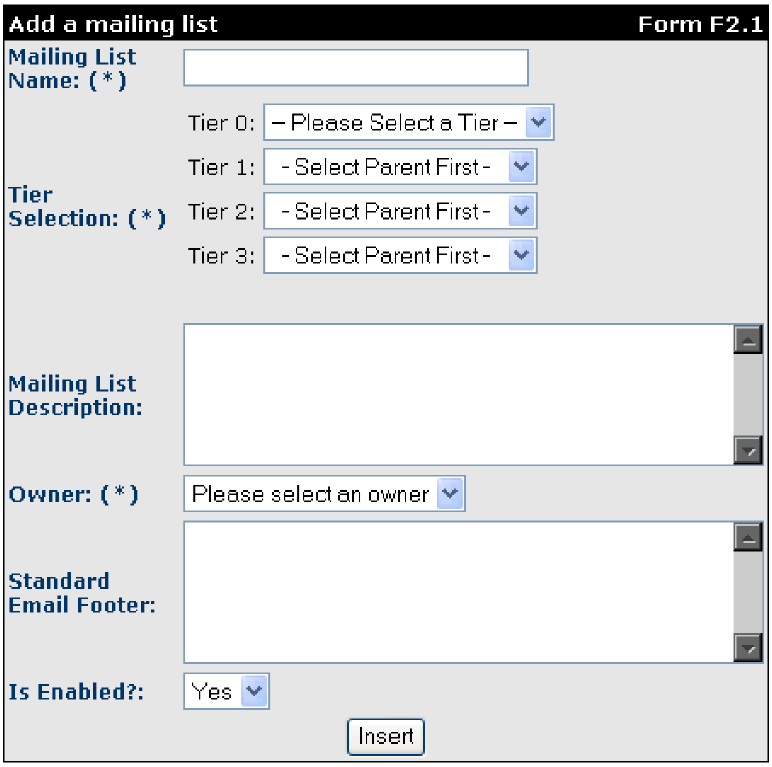
4.5.1 Adding a Mailing List

1. Click on the ***Mailing Lists*** option under ***Features***.

2. Click on the ***Add a New Mailing List*** link.



3. Page will display the "*Add a Mailing List*" form.



4. Enter a ***Name*** for the mailing list.

5. Select a location for the mailing list from the ***Tier Selection*** drop-down menus.

6. Enter a short description for the mailing list in the ***Mailing List Description*** box. This description will be displayed on the public site.

7. Select an ***Owner*** for the mailing list. This person will receive all emails related to this list.

8. Enter a ***Standard Email Footer***. This text will appear at the end of all outgoing emails to the mailing list.

9. Set ***Enabled*** to "*Yes*" to activate the mailing list, else choose "*No*".

10. Click ***Insert*** to finish.

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the module. Follow the next steps to modify the pages template and publish your feature to the public site.*

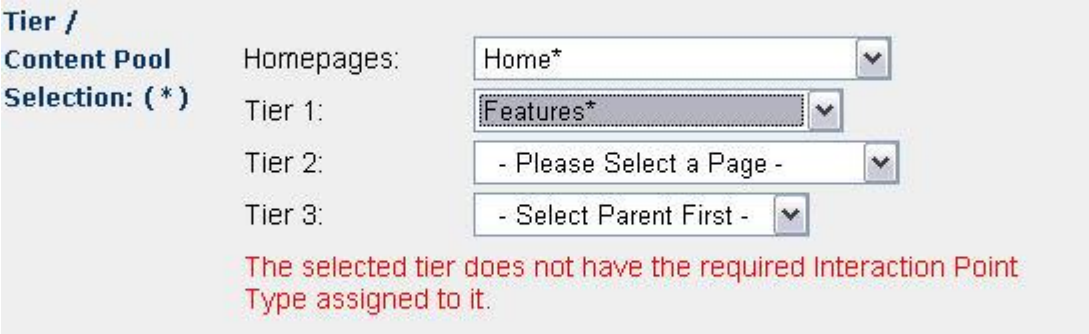
4.5.2 Publishing your Mailing List feature on the Public Site

The page you wish to place your feature on must have the required feature module within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for a module or Feature to be located.

When creating your features tier locations, a message will display if the pages template does not support the selected module. *"The selected tier does not have the required Interaction Point Type assigned to it."*

1. Find the content item you wish your feature to be displayed on

   a. Select ***Administer this tier element*** to take you directly to the tiers administration page.



<u>Or</u>

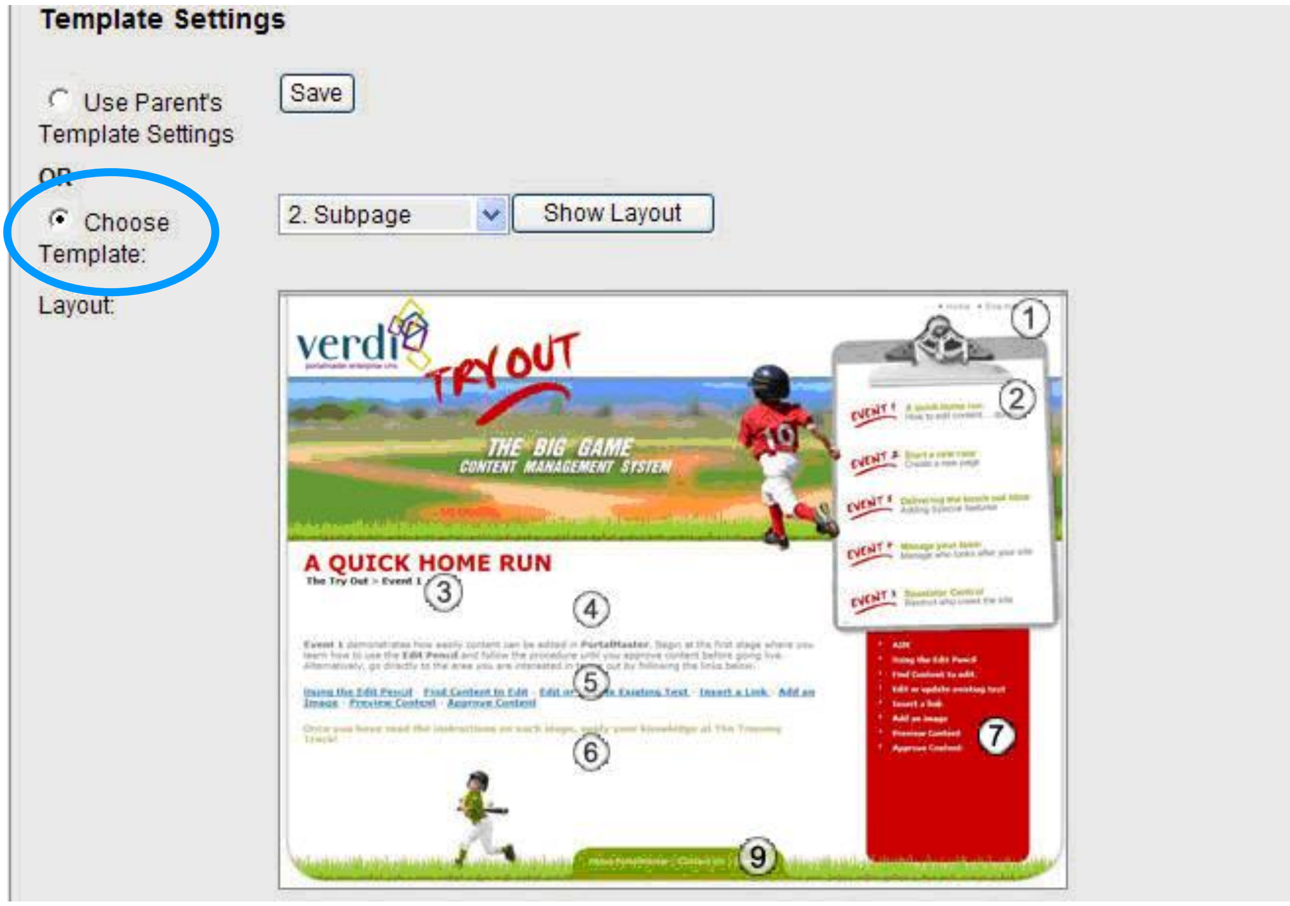
a. From the Site Structure left navigation, select the page you wish the feature to be displayed on.

b. Select the ***Template Settings*** Tab

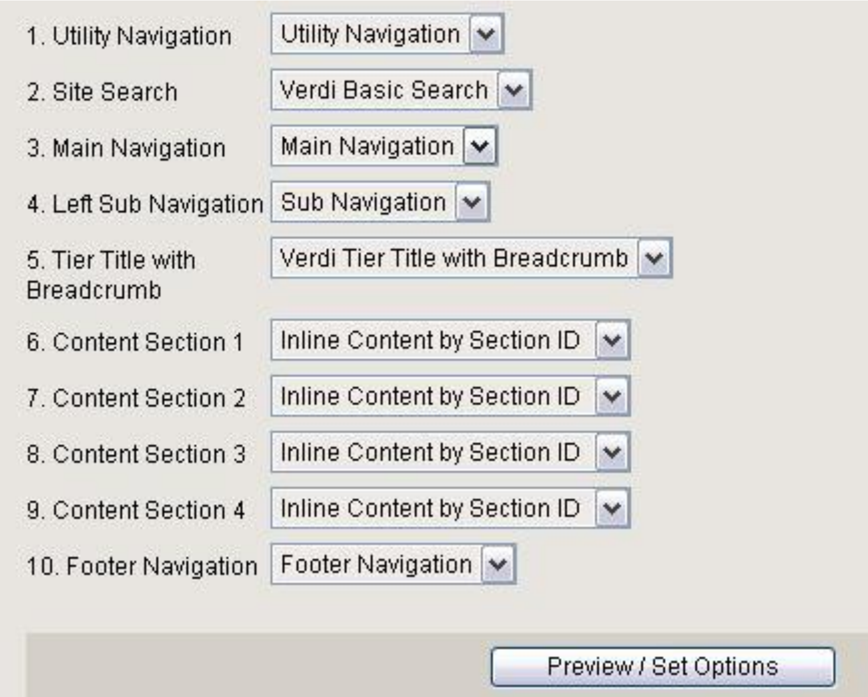
2. Select the ***Choose Template*** radio button, and select the required pages template from drop down menu.

3. Select ***Show Layout*** button, and select the required pages template from drop down menu.

4. The following screen will load:



5. Select which section of the template you wish your feature to display by clicking on the relevant drop down field. Find your feature item and select.

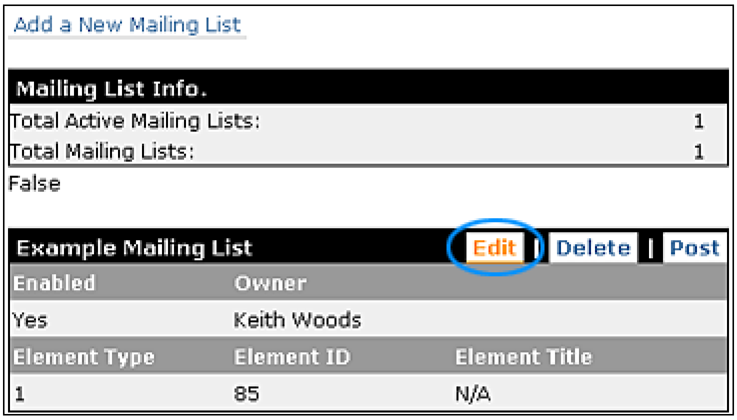


6. Select the ***Preview/ Set Options*** button to save your changes.

> *Your feature will now be displayed within the page on the public site.*

4.5.3 Editing a Mailing List

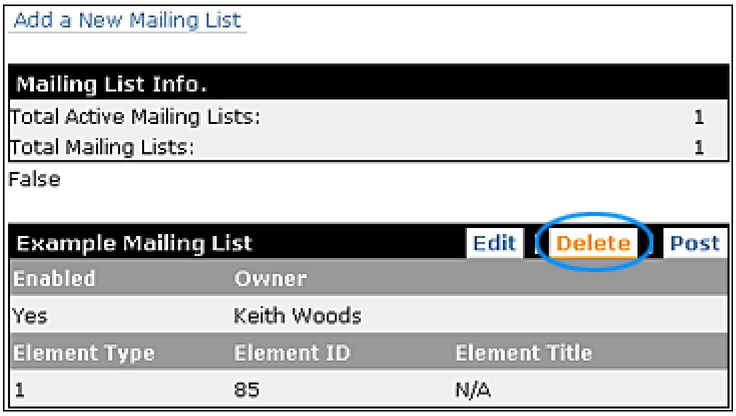
1. Click on the ***Edit*** option for the appropriate Mailing List.



2. Make the appropriate changes.
3. Click the ***Update*** button to finish.

4.5.4 Deleting a Mailing List

1. Click on the ***Delete*** option for the appropriate Mailing List.



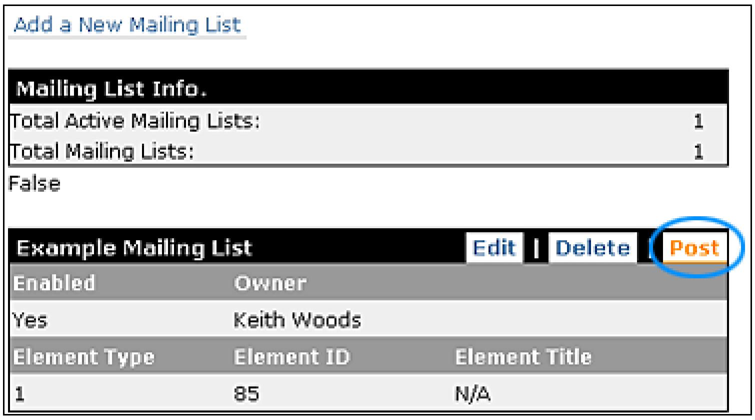
2. You will be presented with a conformation box asking if you are sure you wish to delete the specified Mailing List, click on the ***OK*** button to confirm.

4.5.5 Posting to Mailing List Subscribers

You are only able to post to "*Enabled*" mailing lists that have valid subscribers associated with them.

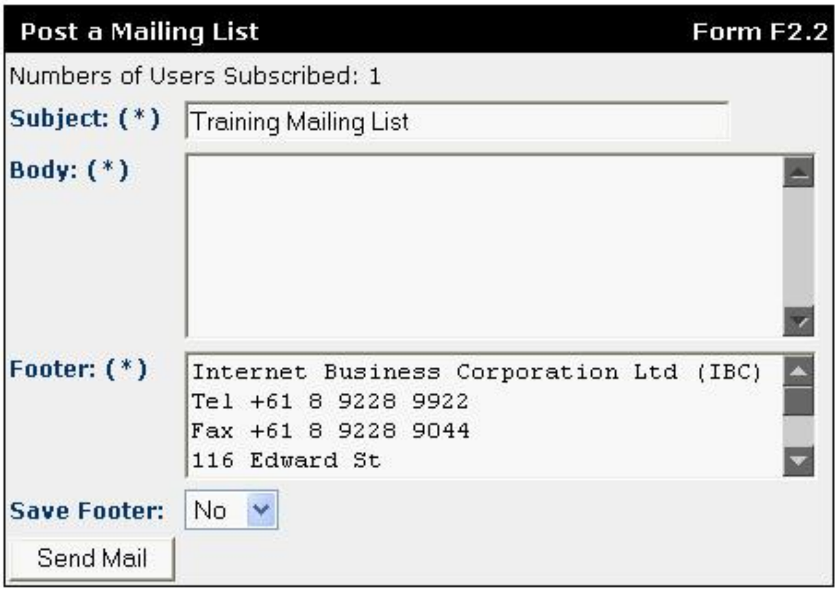
***Note:** If there are no valid subscribers to the mailing list then an information box will be presented to the user.*

1. Select the desired mailing list and click on the ***Post*** option.



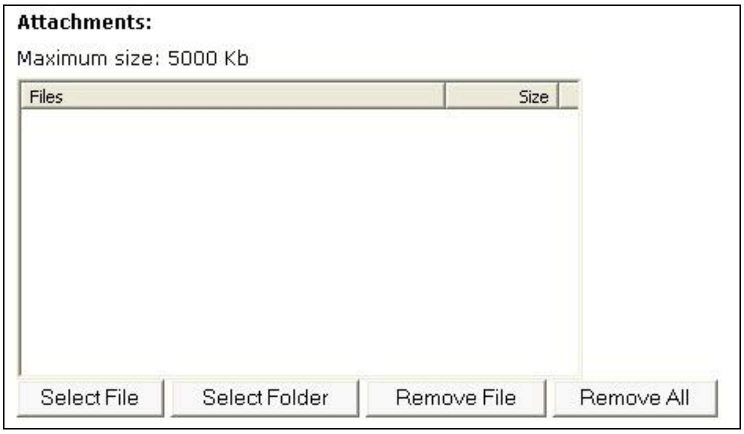
***Note:** Only the mailing list owner may post to the subscribers of that list.*

2. The "*Post a Mailing List*" form will be shown on the page.



3. The name of the mailing list will appear in the ***Subject*** box as a default value. You can change it or you can use the existing name.
4. Enter the information of the mail in the ***Body*** box.
5. The standard email footer from the mailing list will appear as a default value in the ***Footer*** box. You can change it or you can use the existing information.

6. If you add or change the default information of the footer, you can save the information by choosing Yes to the ***Save Footer*** option. If you select ‘No’, the footer information will be unique to this particular mail.
7. **Adding Attachments:** If you want to add an attachment to the mail, click on the ***Add*** button under the attachments header. Select the file from its location / path and click ***OK***.



8. Click ***Send Mail*** to send your post to the mailing list.

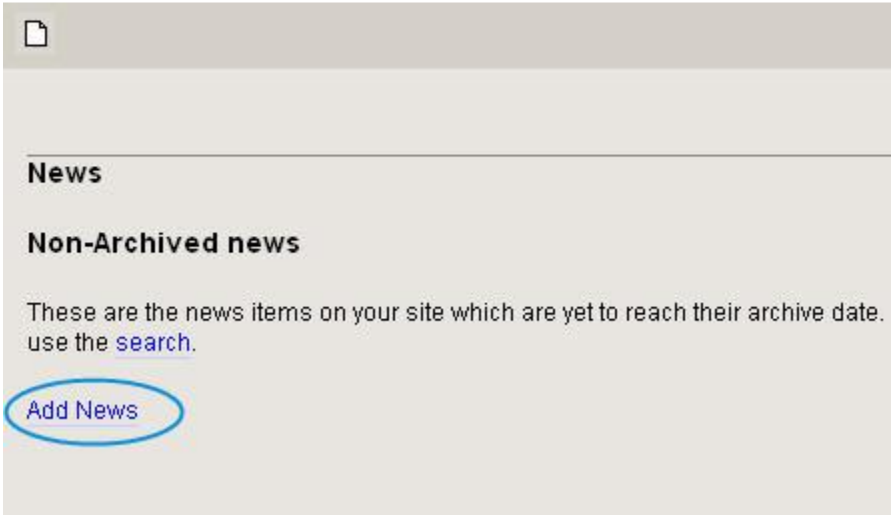
4.6 News

The News feature enables you to publish any news articles easily to the website.

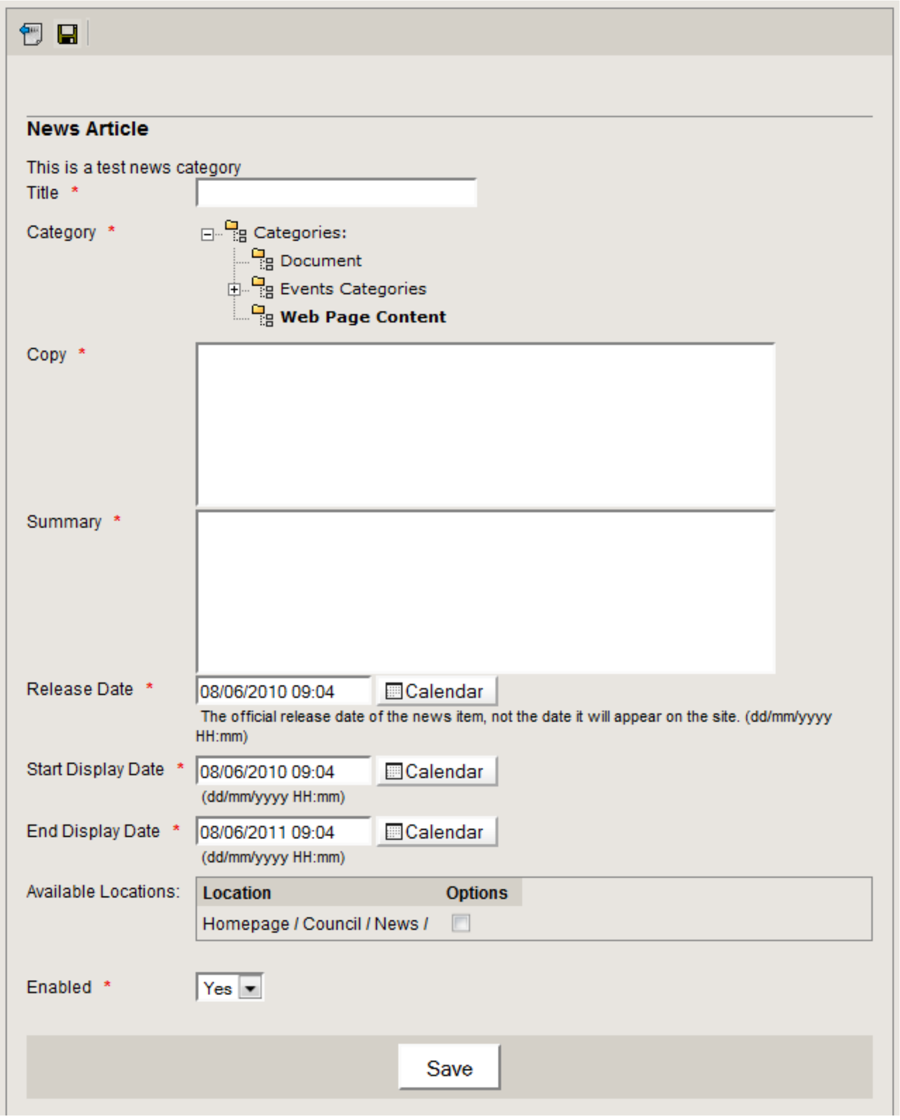
4.6.1 Adding a News Article

1. Click on the ***News*** option under ***Features***.

2. Click the ***Add News*** button.



3. The page will display the '*News Article*' section.



4. Type in a title for your news article into the ***Title*** text box.
5. ***Category*** – select the category from the category tree.
6. Paste or type the body of the news item into the ***Copy*** text area.
7. ***Summary*** – enter a general summary of your article.
8. Using the ***Release Date*** calendar, select the date the news item was released.
9. Using the ***Start Display Date*** calendar, select the date from which the news article should be displayed on the website.
10. Using the ***End Display Date*** calendar, select the date for the news article to be removed from view.
11. The ***Available Locations*** lists the pages that already have the ***News*** module within the pages template. Select the Check boxes for the pages where you would like this News Article to appear. When you save the news article an ***Article Display Location*** will be added for each of the ticked locations.

> *If there are no Display Locations listed here, there are no pages on your site that support the Module. Follow the steps to modify the pages template and publish your feature to the public site.*

12. Select "Yes" for the ***Enabled*** field to enable the news item and make it live on the public site.
13. Click ***Save*** to finish.

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the IP type. Follow the next steps to modify the pages template and publish your feature to the public site.*

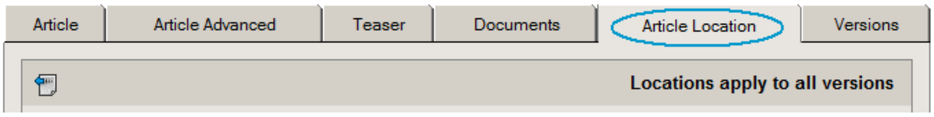
4.6.2 Publishing your News feature on the Public Site

The page you wish to place your feature on must have the required feature IP type within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for an IP Type or Feature to be located.

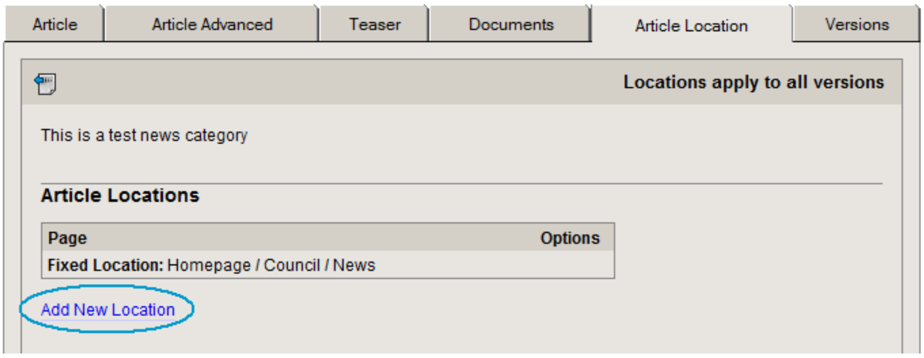
When creating your features tier locations, a message will display if the pages template does not support the selected IP type. *"The selected tier does not have the required Interaction Point Type assigned to it."*

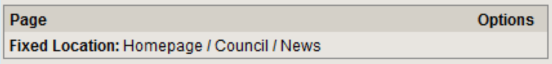
1. Find the content item you wish your feature to be displayed on

    a. Select ***Article Location***.



Select ***Add New Location.***



> ***Note**: You may see fixed locations if there are any News Category Behaviours created and the news article belongs to one of those categories.*
>
> 
>

Using the Tier drop downs, select the page you wish the feature to be displayed on.

Click ***Save***

> *Your feature will now be displayed within the page on the public site.*

4.6.3 Editing a News Article

1. Select the ***Edit*** option for the appropriate news article.

Newsletters

Title	Release Date	Live Date	Archive Date	Options
Newsletters test item2	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item3	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item4	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item1	09/01/2008	11/10/2007	11/10/2008	edit | del

2. Make the necessary changes.
3. Click on the ***Save*** button.

4.6.4 Deleting a News Article

1. Select the ***Delete*** option for the appropriate news article.

Newsletters

Title	Release Date	Live Date	Archive Date	Options
Newsletters test item2	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item3	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item4	11/10/2007	11/10/2007	11/10/2008	edit | del
Newsletters test item1	09/01/2008	11/10/2007	11/10/2008	edit | del

2. You will be presented with a conformation box asking if you are sure you wish to delete the specified News Item, click on the ***OK*** button.

4.6.5 Adding a News Item Display Location

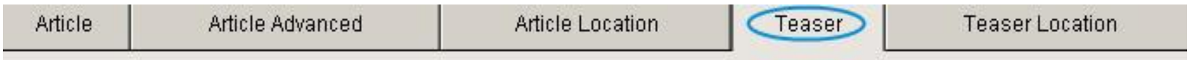
1. To add a News Item Location for a specific news item, ***Edit*** the required news item, click on the ***Article Location*** tab, then select the ***Add New Location*** button found below the main news article details.

2. The page will display the “Article Location” form.

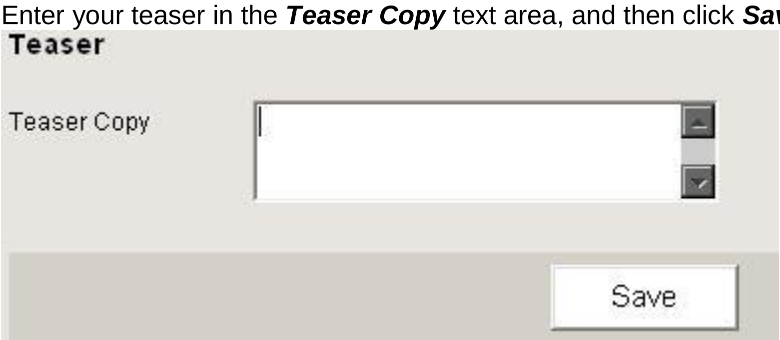
3. Use the ***Display Tier*** drop down menu to select an appropriate location on the website for the news item to be displayed.
4. Set ***Enabled*** to ‘*Yes*’ to activate the display location.
5. Click on the ***Save*** button.

4.6.6 Adding a News Item Teaser

1. Select the ***Teaser*** tab.



2. Enter your teaser in the ***Teaser Copy*** text area, and then click ***Save***.



4.6.7 Adding a News Item Teaser Location

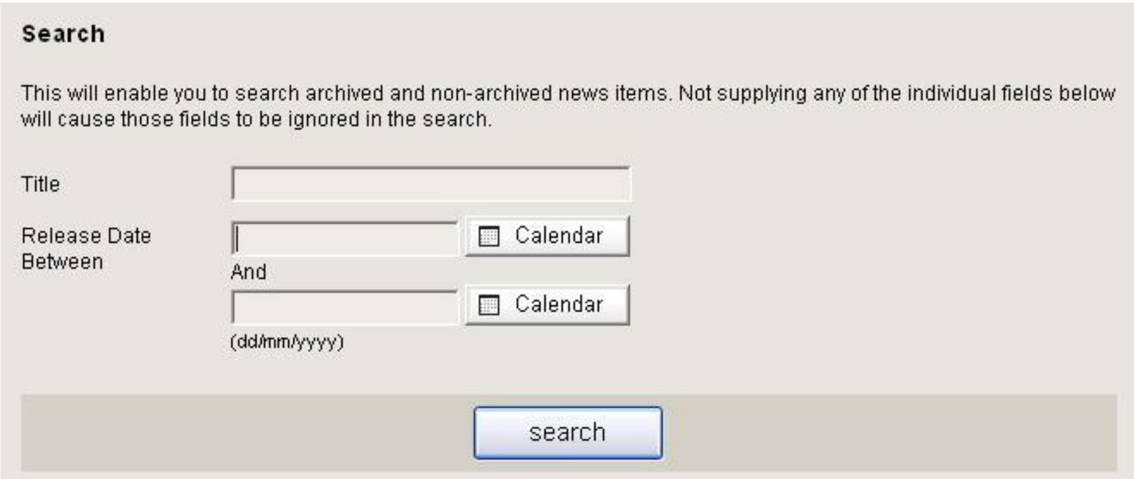
1. Teaser Locations are on the same tab as the Teaser text. Scroll down to the Teaser Locations Section, then select ***Add New Teaser Location***.

2. The ‘*Add New Teaser Location*’ form will be displayed.

3. Use the ***Tier*** drop down menu to select the appropriate location on the website for the news item teaser to be displayed.
4. ***Full Article Display*** is only activated after adding display locations for the news item. This option allows you to specify which of the available News Item Display Locations will display the full details of the teaser news items.
5. Set ***Enabled*** to ‘Yes’, to activate the teaser.
6. Select the required ***Contact Publisher*** if available. This option is only available if a contact has been assigned to the tier you wish to display the news teaser on and should be contacted before enabling on the public site.
7. Click ***Save*** to add the location.

4.6.8 Searching the News Archive

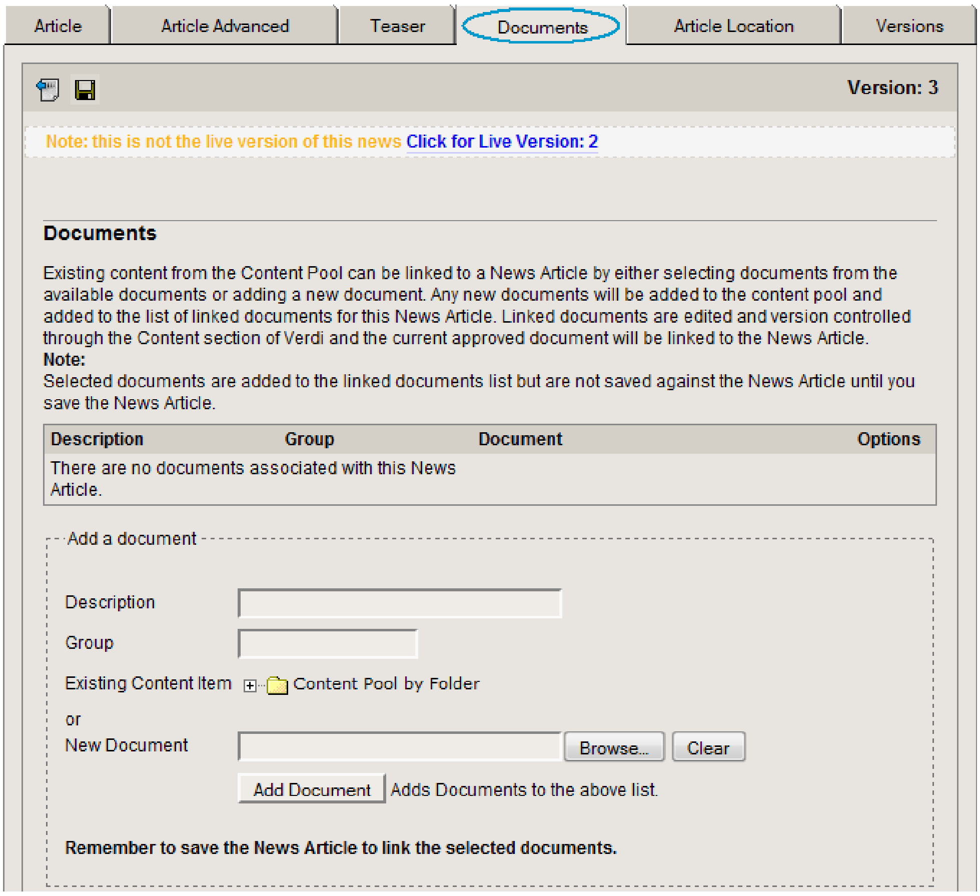
1. Enter a ***Title*** and/or select a valid date range to search within using the ***Calendar*** buttons for the ‘Release Date Between’.



2. Click on ***Search***, to reload the news list containing all news with a start date that falls within the selected date range.

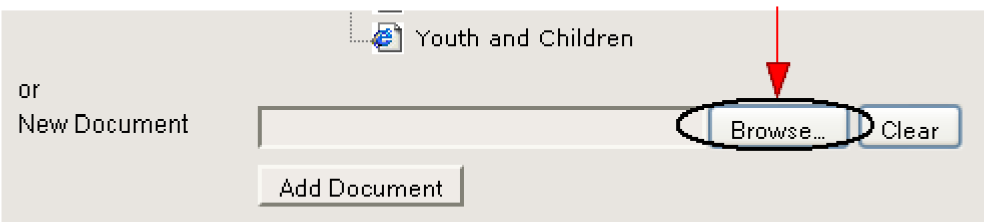
4.6.9 Adding Documents to a News Article

1. ***Edit*** the required news article and select the ***Documents*** tab.



2. Enter a ***Description*** and ***Group*** for the document to be added and select the document from the tree structure of existing content items.

3. If the document you wish to add to the news article does not already exist in the content pool you can add a new document by clicking the browse button and selecting the document from your computer.



4. Click the ***Add Document*** button. This will add the select document to the list of documents linked to this Event. If you have selected a new document this will add your new document to the list of linked documents.

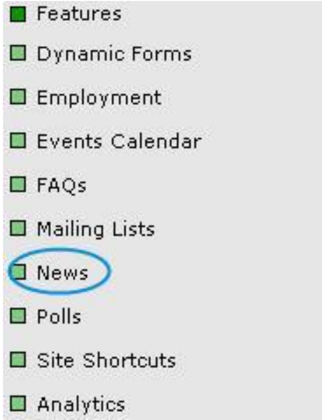
5. Click the ***Save*** button to save the selected document links for this news article.

Your document will now be displayed within the news article on the public site.

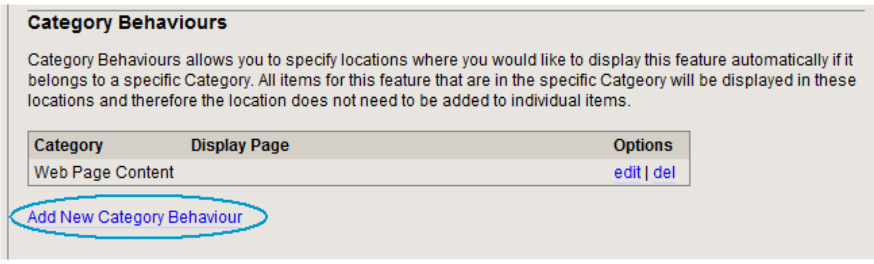
4.6.10 Adding News Category Behaviours

The News Category Behaviours enables you to set default locations for categories so that any news articles created that belong to a category with a category behaviour will automatically be displayed on the pages specified in the category behaviour for that category.

1. Click on the ***News*** option under ***Features***.

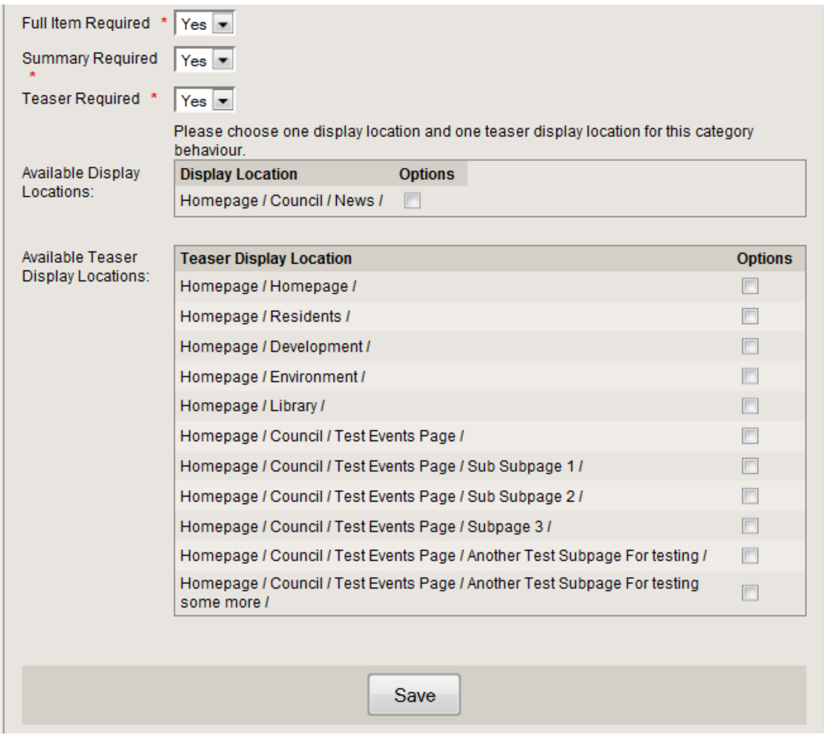


2. Scroll down to the Category Behaviours section and click “***Add New Category Behaviour***”.



3. Select the ***Category*** and enter ***introduction*** text.

4. Select options for required fields and check the locations and teaser locations for this category behaviour.



5. Click the ***Save*** button to save the category behaviour.

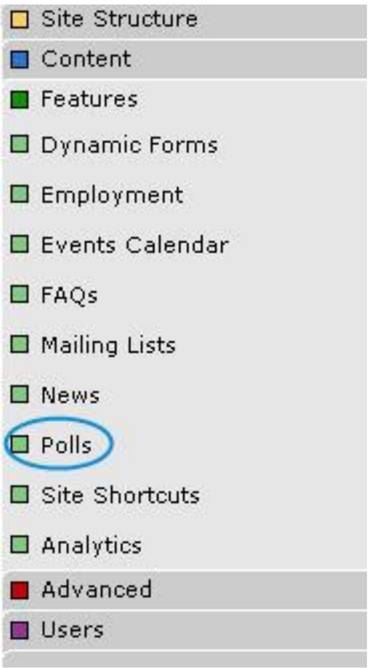
All the pages that allow the news module or news teaser module will be listed as available locations for selection.

4.7 Polls

Verdi enables you to create simple Polls – you may pose a question or post an issue and Website users can vote according to a list of pre-defined options.

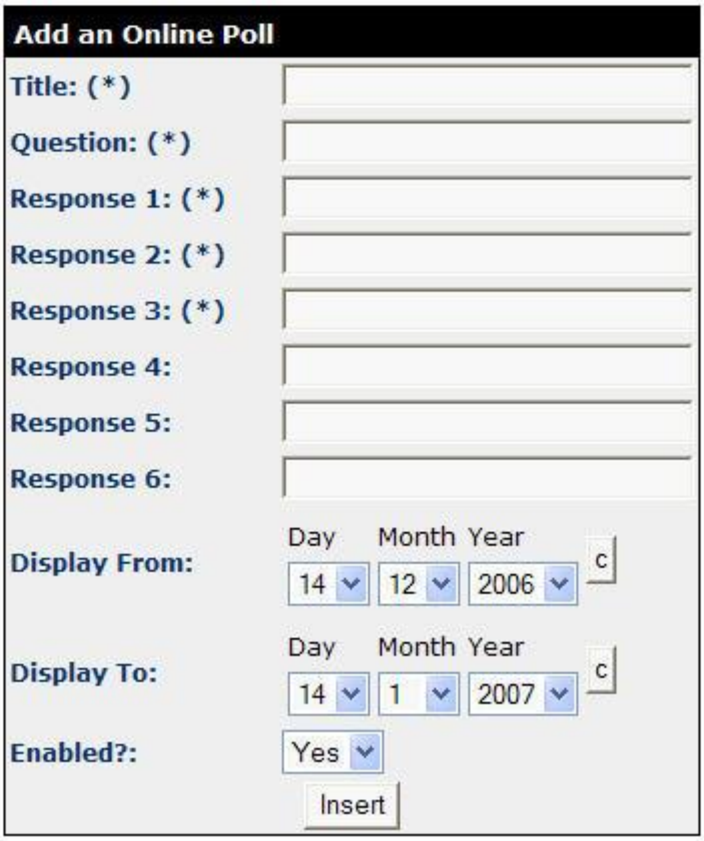
4.7.1 Adding a Poll

1. Click on the ***Polls*** option under ***Features***.



2. Click on the ***Add a new Online Poll*** link.

3. The '*Add an Online Poll*' form will be displayed.



4. Enter a ***Title*** for your Online Poll.
5. In the ***Question*** text box enter the question or issue on which you want user feedback.
6. In the ***Response*** text boxes enter the options that Website users may select as their choices when they vote. Enter at least three response options for the question. You can enter a maximum of 500 characters.
7. Use the ***Display From*** drop down menu to select a date to display the poll in the website.
8. Use the ***Display To*** drop down menu buttons to select the end of the display date.
9. Select '*Yes*' for the ***Enabled*** drop-down menu.
10. Click on the ***Insert*** button.

> *You have now created your feature within the administration area. If the feature is not appearing on the public site, your pages template may not support the module. Follow the next steps to modify the pages template and publish your feature to the public site.*

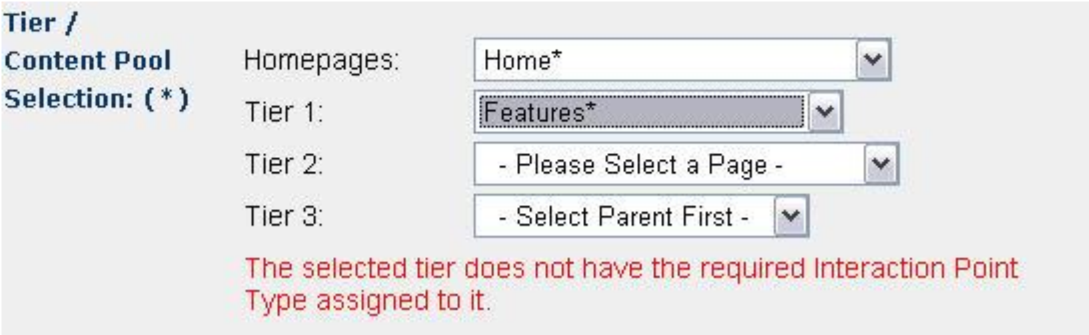
4.7.2 Publishing your Online Poll feature on the Public Site

The page you wish to place your feature on must have the required feature module within the pages template. Each template is divided into a number of sections within a grid layout. Each section defines a space for a module or Feature to be located.

When creating your features tier locations, a message will display if the pages template does not support the selected module. *"The selected tier does not have the required Interaction Point Type assigned to it."*

1. Find the content item you wish your feature to be displayed on

    a. Select ***Administer this tier element*** to take you directly to the tiers administration page.



<u>Or</u>

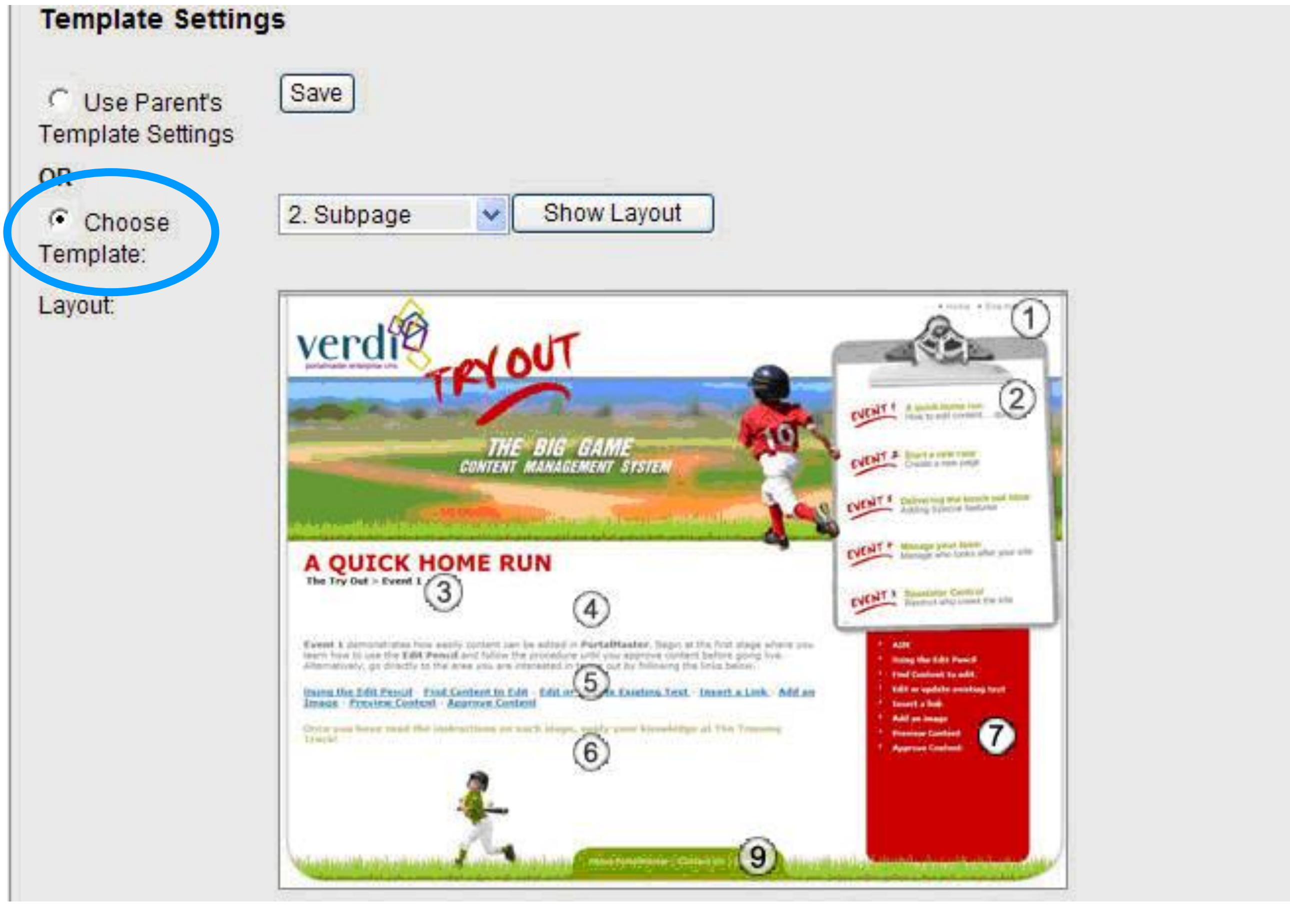
a. From the Site Structure left navigation, select the page you wish the feature to be displayed on.

b. Select the ***Template Settings*** Tab

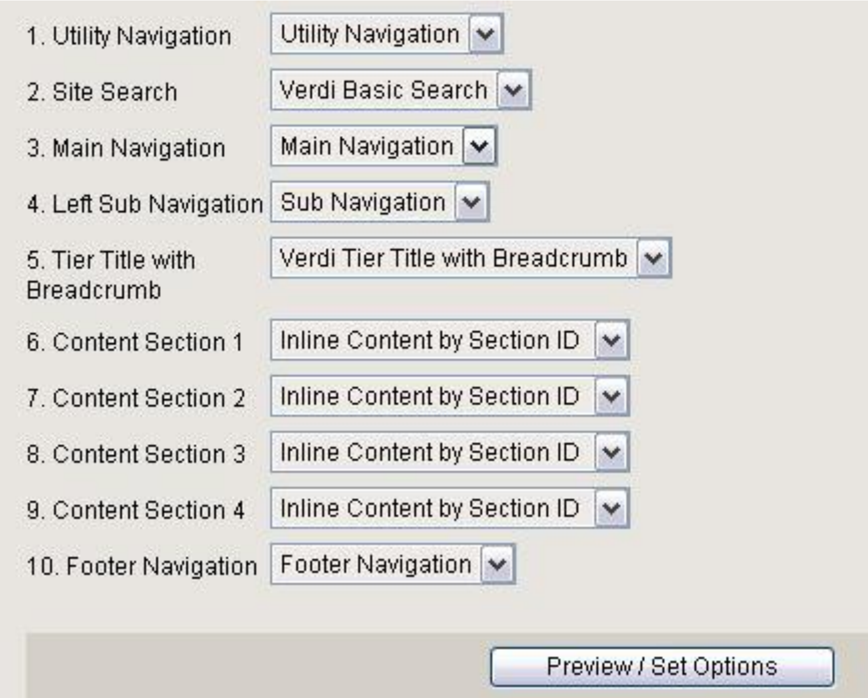
2. Select the ***Choose Template*** radio button, and select the required pages template from drop down menu.

3. Select ***Show Layout*** button, and select the required pages template from drop down menu.

4. The following screen will load:



5. Select which section of the template you wish your feature to display by clicking on the relevant drop down field. Find your feature item and select.

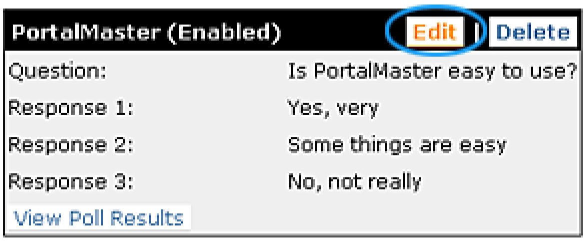


6. Select the ***Preview/ Set Options*** button to save your changes.

Your feature will now be displayed within the page on the public site.

4.7.3 Editing a Poll

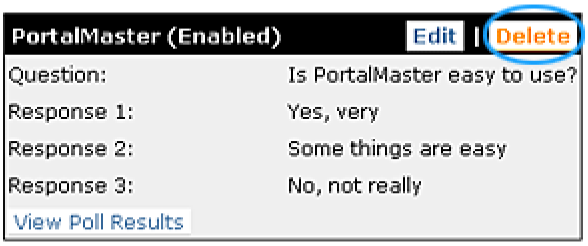
1. Click on the ***Edit*** option for the appropriate Poll.



2. Make the necessary changes.
3. Click on the ***Update*** button.

4.7.4 Deleting an Online Poll

1. Click on the ***Delete*** option for the appropriate Poll.

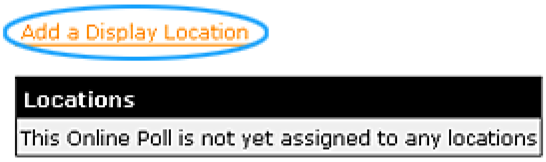


2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified Poll, click on the ***OK*** button to confirm.

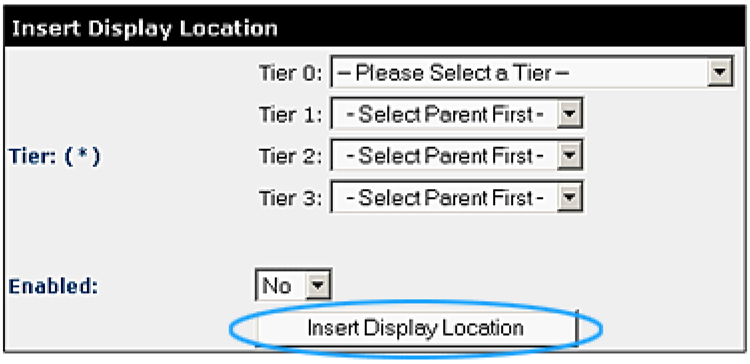
4.7.5 Adding a Poll Display Location

Polls can be placed at multiple locations on the website

1. Edit the poll and scroll to the bottom of the page until you see the ***Add A Display Location*** button.



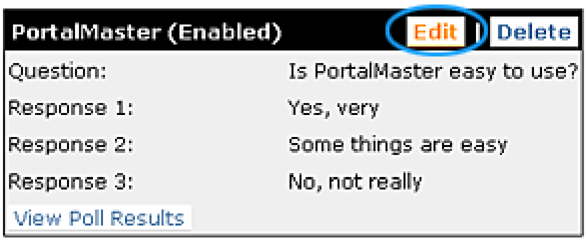
2. The ‘*Insert Display Location*’ form will load.



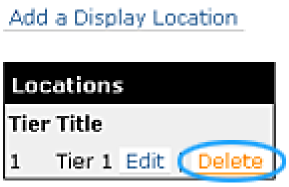
3. Use the ***Tier*** drop-down menu to select where you would like to place the poll on the website.
4. Set ***Enabled*** to ‘*Yes*’ so that the display location is current.
5. Select a ***Contact Publisher*** (if applicable) to request permission to display the poll on the chosen page.
6. Click on ***Insert Display Location*** to finish.

4.7.6 Deleting a Poll Display Location

1. ***Edit*** the required poll



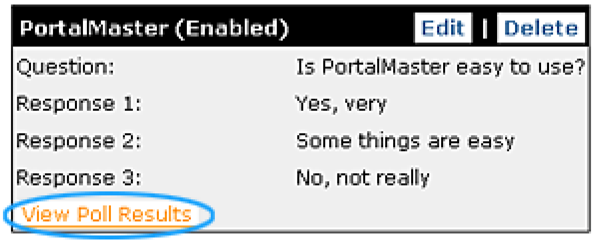
2. Click on the ***Delete*** option for the poll display location you would like to remove.



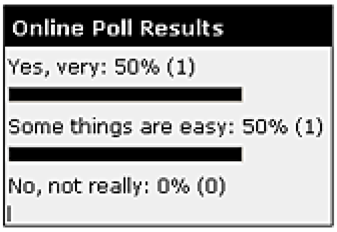
4.7.7 View the Poll Results

Ongoing results of the poll can be viewed within the administration.

1. Click on the ***View Poll Results*** option for the required poll



2. The results of the poll will open and display in a new popup window.



4.8 Site Shortcuts

Site Shortcuts enables authorised users to create menus of text links within key places in the site. The shortcuts appear in the header, footer or some custom sections of all pages within the site.

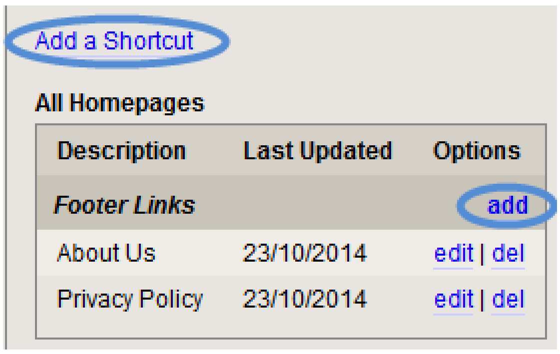
Site Shortcuts can be an effective way to provide quick access to the most commonly used content in a site. There are two types of site shortcuts:

1. **Header Site Shortcuts** include Home, Search and Contact Us links. These are usually named 'Utility Navigation' links.
2. **Footer Site Shortcuts** include Sitemap, Copyright and disclaimer links.

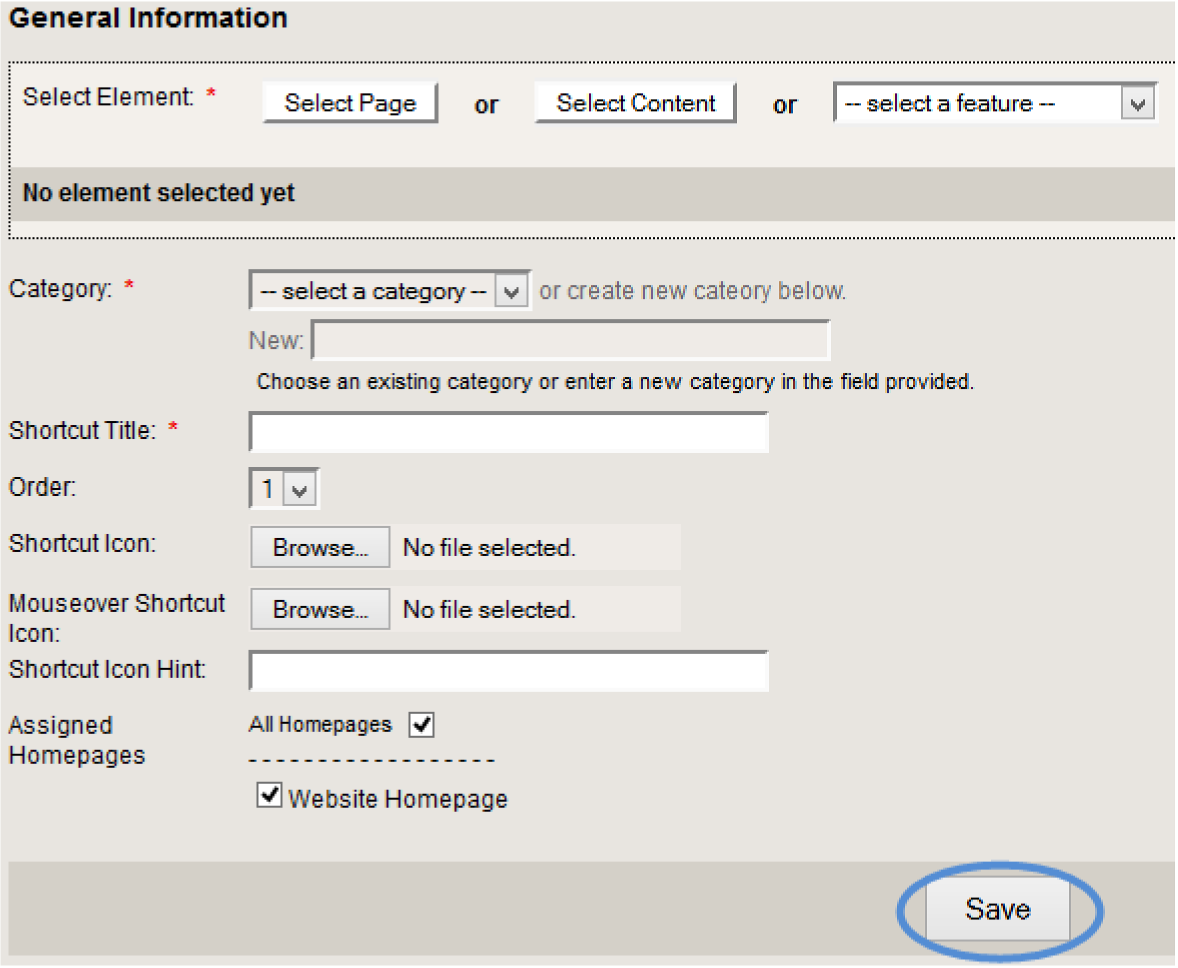
4.8.1 Adding a Site Shortcut

1. Click on the ***Site Shortcuts*** option under ***Features***.

2. Click on the ***Add a new Site Shortcut*** button.



3. The "*Add a Site Shortcut*" form will be displayed.



4. Select where you want your site shortcut to link from the following options:
    a. ***Select a Page*** – select from this option if you want to link to a page within your site.
    b. ***Select a Content Pool Item*** – select this option to link directly to a content pool item.
    c. ***Select a Feature*** – select this option to link to an available feature (e.g. Sitemap).

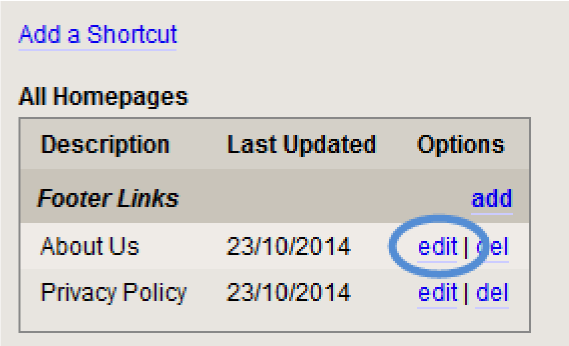
5. Using the ***Category*** drop down menu select a location for your shortcut. Options available:
    a. Selecting ***Text Link*** (in some cases *Utility Link*) will place the shortcut into the header section of all pages.
    b. Selecting ***Quick Links*** will place the shortcut in a drop menu.
    c. Selecting ***Footer Links*** will place the shortcut into the footer section of all the pages.
    d. Selecting an existing category or adding a new category in the text box will place the shortcut in the drop-down menu.

> ***Note****: The Categories that are available may differ depending on the setup of your site.*

6. Enter an ***Shortcut Title*** of your choice for the shortcut in the text box for display in the Site Shortcuts drop down menu if you wish to display something other than the Tier Element name
7. Using the ***Order*** drop down menu button, select the order of the shortcuts links (only applicable if you have more than one shortcut)
8. ***Shortcut Icon***, ***Mouse Over Shortcut Icon*** and ***Label Shortcut Icon*** are optional functions that enable you to upload and use your preferred icons. Support for icons needs to be plugged-in to Verdi before this functionality can be used, if this functionality is disabled these items will not be accessible. Click on the Browse button to locate an icon from your local or network drive.
9. Enter a ***Shortcut Icon Hint***. This is used on the public site to describe the shortcut.
10. Select the ***Assigned Homepages*** that you would like the shortcut to appear on. This allows you to control which public site the shortcut appears on (if you have multiple sites running from the same instance of Verdi). If you would like the shortcut to appear on all websites check the ***All Homepages*** checkbox.
11. Click ***Save*** to finish.

4.8.2 Editing a Site Shortcut

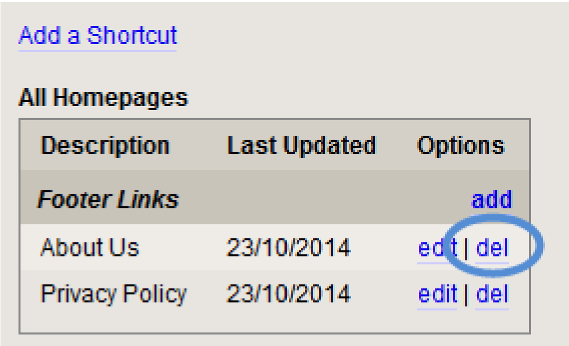
1. Click on the ***edit*** option for the appropriate Site Shortcut.



2. Make the appropriate changes.
3. Click the ***Save*** button to finish.

4.8.3 Deleting a Site Shortcut

1. Click on the ***del*** option for the appropriate Site Shortcut.



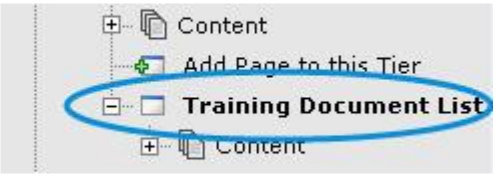
2. You will be presented with a confirmation box asking if you are sure you wish to delete the specified Site Shortcut, click on the ***OK*** button to confirm.

4.9 Adding Documents & Document Lists

The Document Lists module enables you to create a list of available documents (ie : PDF or Word) with a description of their content for your users to view or download.

4.9.1 Adding Documents to your site

1. Select the page that your document list will appear on from the ‘Site Structure’

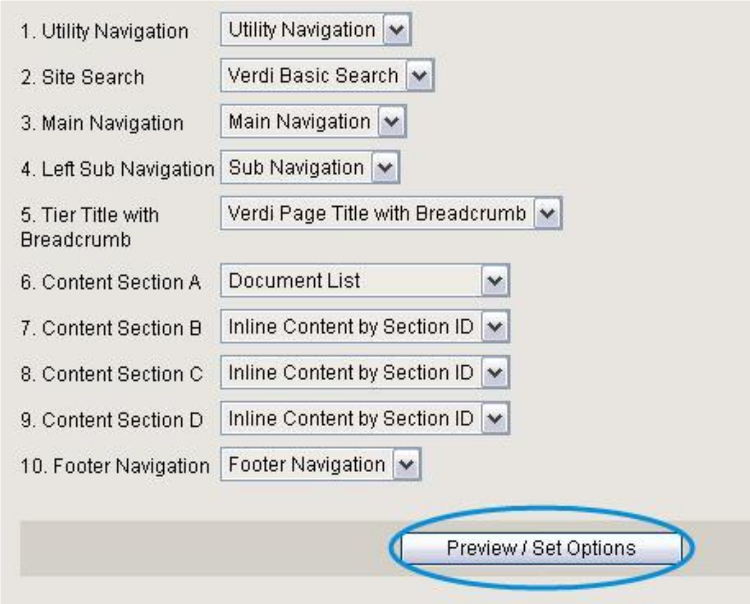


2. Click on the ***Template Settings*** tab on the top navigation. The ***Template Settings*** form should load.

3. From the options available select ***Choose Template*** and select ***<preferred page template>*** from the drop-down menu and click ***Show Layout***.

Note*: This will load the Module selection section.*

4. Use the drop-down menus to select **Document List** in the **Content Section** you wish the document list to appear in:



> ***Note**: The default Modules will load automatically, however these can be changed to the ones that you desire.*

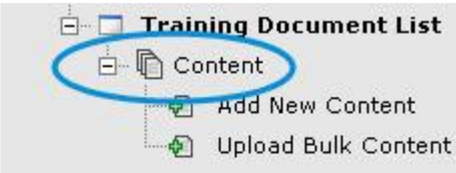
> ***Note**: The default Modules displayed in the image above may differ from those that are featured in the administration site.*

5. Click on the ***Preview /Set Options*** button. A preview of the page is presented with the option to view it in a new window to help see how the page will appear.
6. Once the preview has loaded, click on the ***Save*** button to finish.

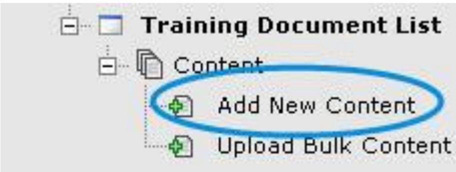
> ***Note**: You have now configured the template page sections to include a 'document list' on this page.*

4.9.2 Adding Documents to a Document List

1. Find your page within the left hand side navigation.
2. Click on the '**+**' symbol next to the content link below your page



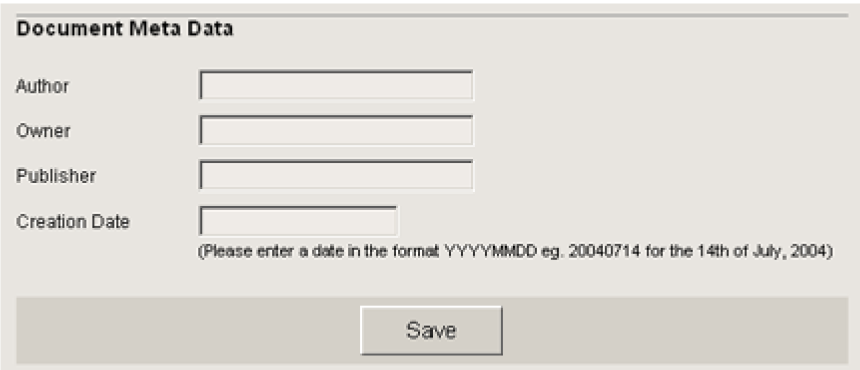
3. Click on the ***Add New Content*** link



***Note**: The **General Information** form should load in the right-hand side pane.*

4. Click on ***Document Content*** link to select the Content Category and click on the ***Set Category*** button.

5. Enter a ***Title*** for your content pool item in the box provided
6. Enter the ***Title Abbrev*** to appear in the site navigation menu in the box provided. (May be the same.)
7. Enter a ***Description*** for your content pool item in the box provided – This will be displayed above the document link to explain the content of the document.
8. Enabled - Select ***Yes – Can be displayed on site*** from the drop down list
9. Scroll down to the ***Document Metadata*** section

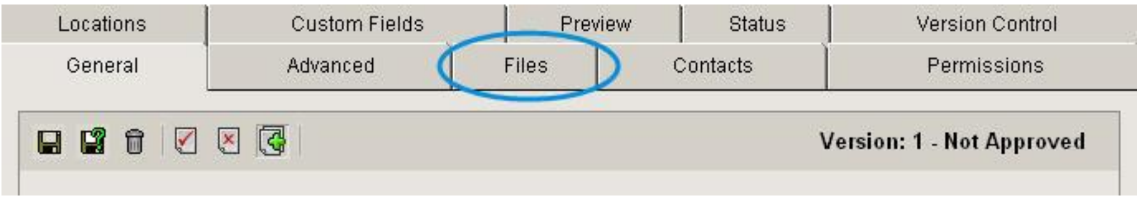


10. Enter your full name in the ***Owner*** text box

11. Click on the ***Save*** button

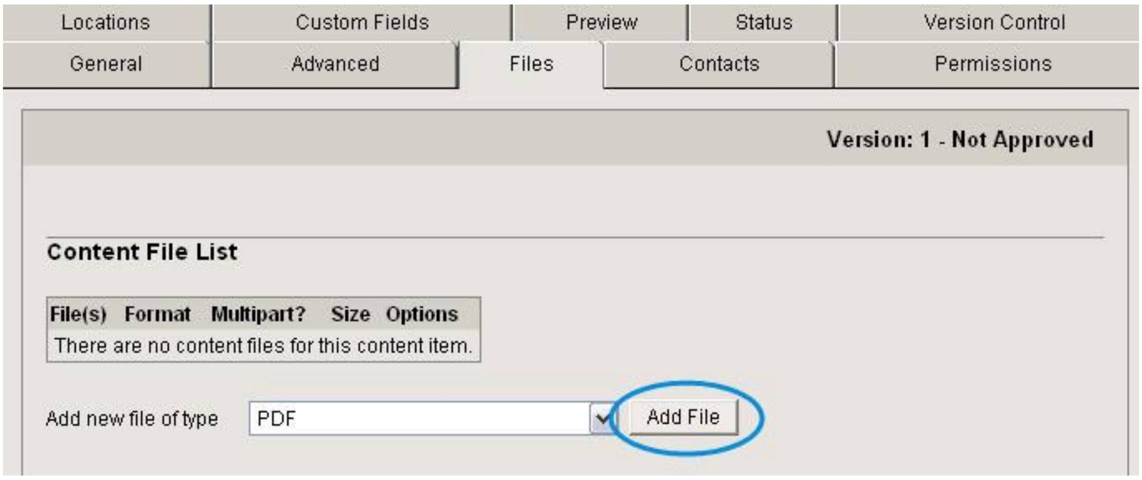
> ***Note**: Your New content has been created. However, as this is for a document the document file needs to be uploaded and the content will need approving/publishing before it will show on the public site.*

12. Click on the ***Files*** tab.

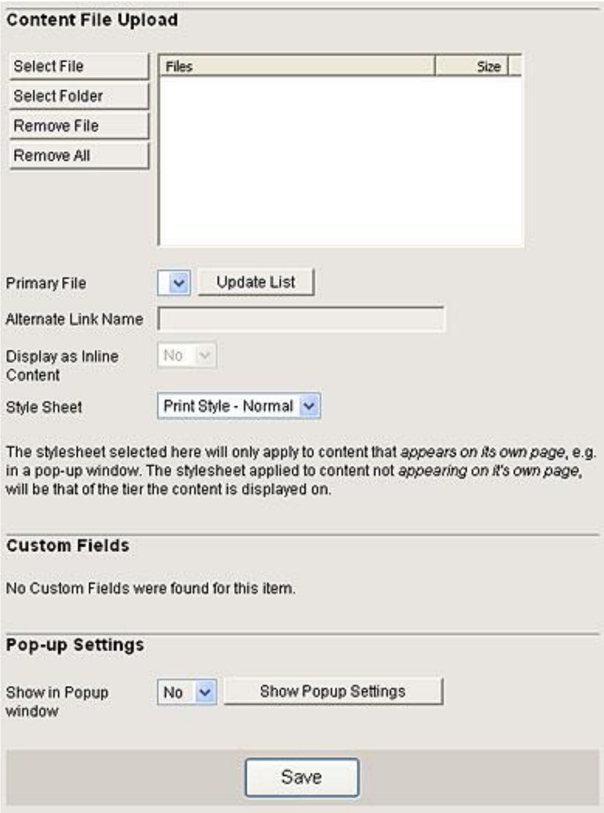


> ***Note**: The Files tab will now load.*

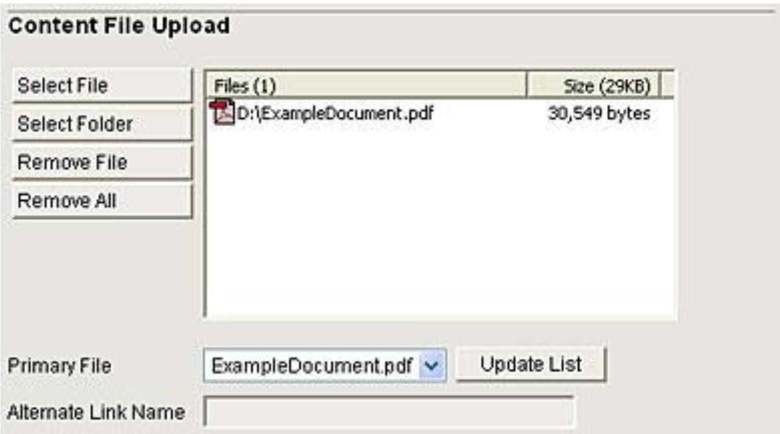
13. From the ***Add new file of type*** drop down select PDF and click the ***Add File*** button.



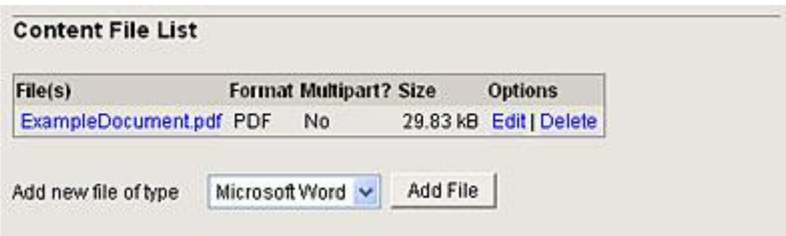
> ***Note**: The Content File Upload form will load.*



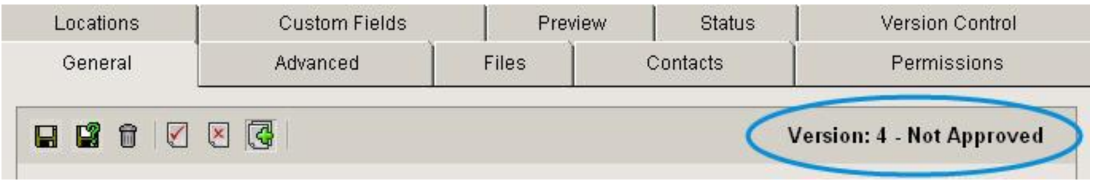
14. Click the ***Select File*** button and browse to the PDF file that you want to upload to the site.
15. Once you have selected the file that you require, the ***Content File Upload*** form will update with the selected file(s). Fill in the Alternative Link Name if you do not want the file name to appear as the link to the document. This will provide a user friendly name for the document.



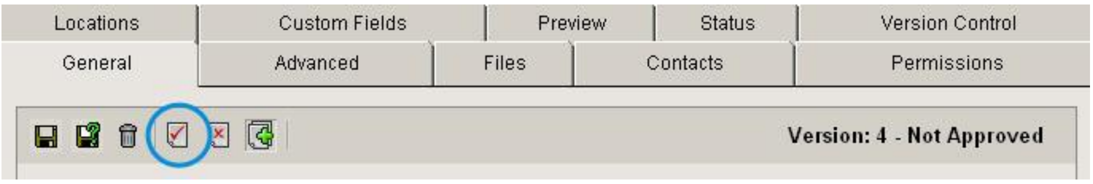
16. Click ***Save*** to add the document to your content.
17. The ***Content File List*** will update with the file(s) that you have added.



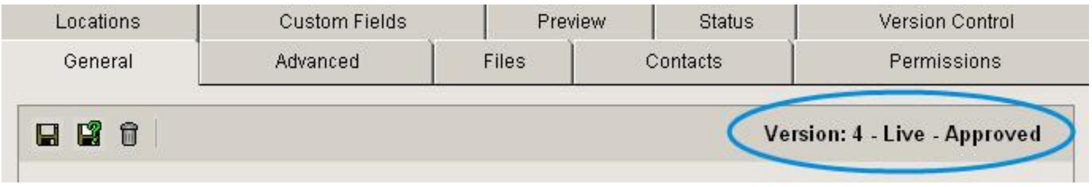
18. You will notice at the top of the screen there is a version number of the current content. This will tell you whether the content is live or will need approving.



19. To make the content live click select the ***General*** tab and click on the ***Publish Content*** button.



20. Once the content has been published the version text will change to read ***Live - Approved*** and the ***Publish Content*** button will no longer appear.



> ***Note****: Your New content has been approved / published and will be available to view on the public site. You may need to refresh the page by pressing F5 on your keyboard.*

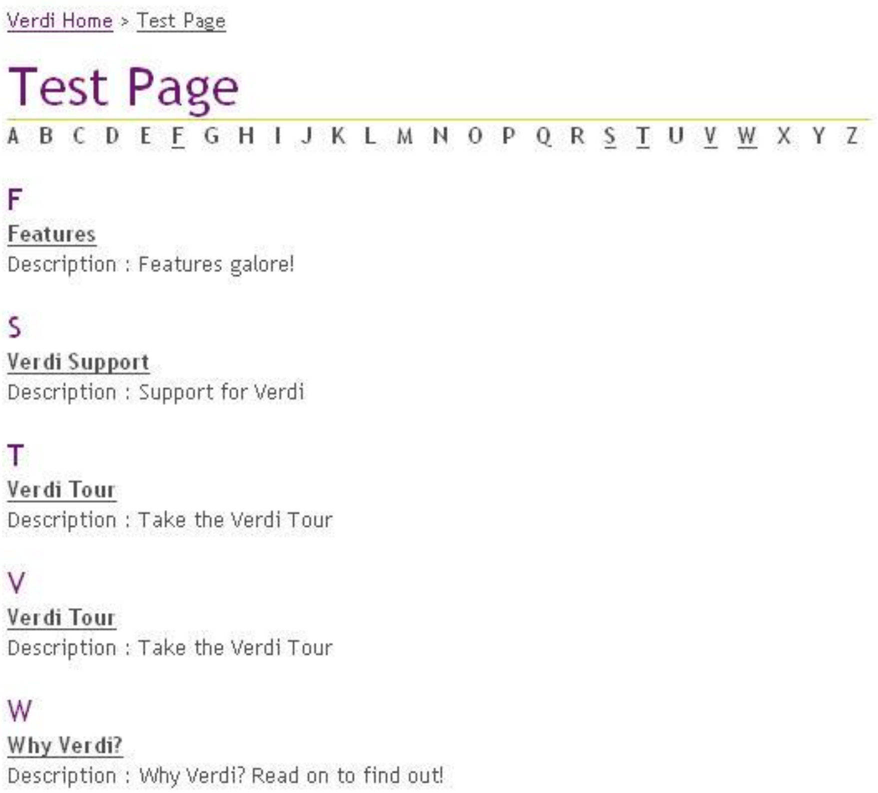
5 A – Z Listing Module

5.1 Overview of the A – Z Listing Module

The “A to Z Listing module” will display an alphabetised list of links to other pages within your website. Each page of your website can be listed multiple times within the A to Z Listing module, under different letters if necessary.

The same A to Z Listing module can also be displayed in many pages of your website.

Example: A-Z Listing module, how it could appear on a public website



5.2 Summary of Exercises

To display the A to Z Listing on your website you must follow these exercises:

1) **Create / Edit a page**
In order to display the A to Z module on your public website, you must add a new page or edit an existing page on your website. In this example, we will add a new page.

2) **Edit template settings on this page to display the A to Z module on that page**
To display the A to Z module on an existing page, you must select that page from the site structure, and click it to edit the page. This will allow you to edit the template settings of this page.

> ***Note:*** *if the option is not available ask your site admin to make it available. See section 5.4.*

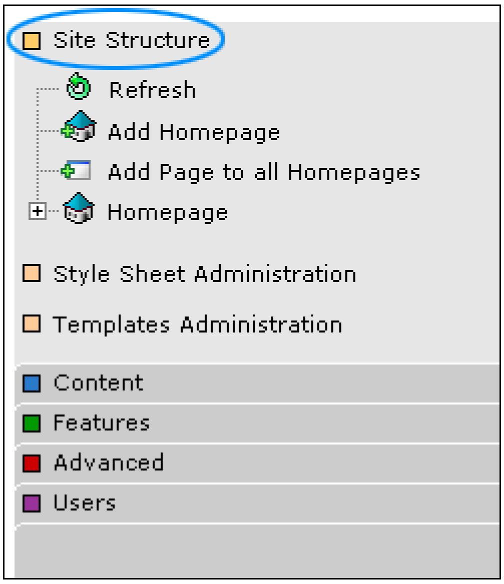
3) **Populate your A to Z Listing, with a list of website page links**
The public display of the A to Z Listing module comprises of a listing of entries of links to other pages in your website. In order to populate the A to Z Listing module with these entries, you must find each page which you wish to list, and add them individually to the list.

5.3 Exercises

5.3.1 Create / Edit a page

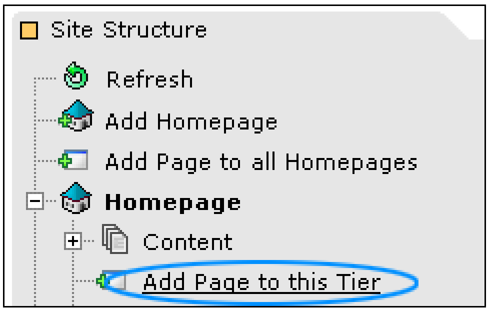
In order to display the A to Z module on your public website, you must add a new page or edit an existing page on your website. In this example, we will add a new page.

20. Click on the ***Site Structure*** option on the left navigation



Note: *The Site Structure menu should open below the menu link*

21. Click '**+**' next to the homepage that you want to add your new page into. Click on the ***Add Page to this Tier*** option



Note: *The Add a Page form, "General Information" will load*

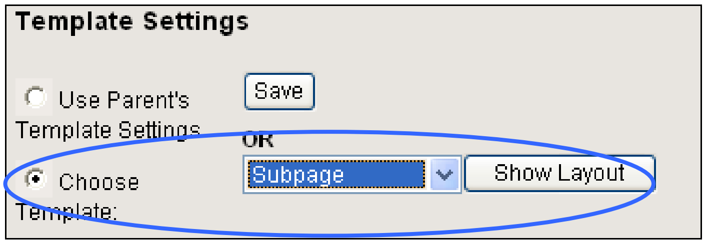
Enter the **General Information** as per the general Verdi administration guide, and click "Save". This will create a new page, which you can administer to display the A to Z Listing module.

5.3.2 Configure Template Settings

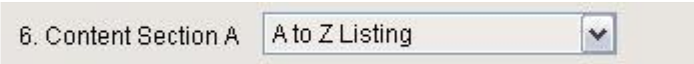
To display the A to Z module on an existing page, you must select that page from the site structure, and click it to edit the page. This will allow you to edit the template settings of this page.

1. Select the **Template Settings** tab

2. Select the **Choose Template** radio button and select a **Subpage** template, click **Show Layout**. A list of content sections for that template will be listed as a series of dropdowns.



3. Ensure that the **"A to Z Listing"** module is set to display on the Content Section you wish it to appear on your page, by choosing **"A to Z Listing"** from the relevant Content Section dropdown.



> ***Note:*** *section 6 is used here as an example only*

4. Click the preview button to preview how your A to Z list will appear on your page.

5. Click the update button at the foot of the page to apply these settings.

6. View the new A to Z Listing on the **Public Site**.

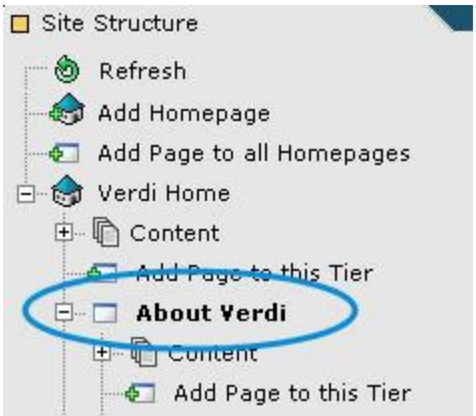
> ***Note:*** *at this stage the module will display on your page, but may or may not have any list entries yet. See the next exercise for how to add entries.*

7. If you wish to display the A to Z Listing module on any other pages of your site, you can simply go through the same process again for each new page, now or at any time in the future.

5.3.3 Populate the A – Z Listing

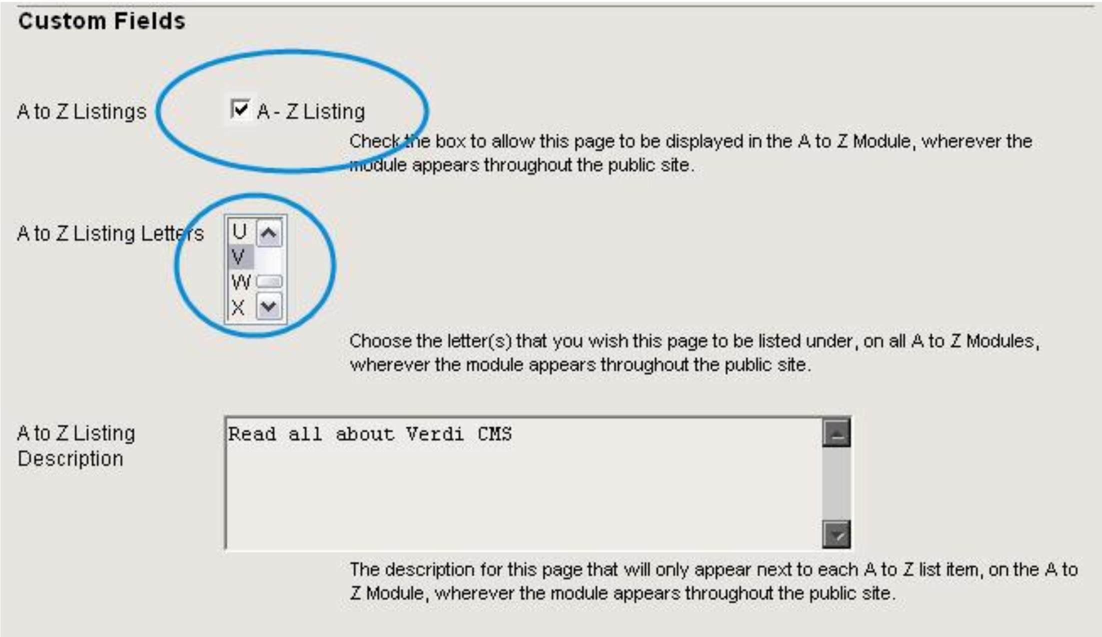
The public display of the A to Z Listing module comprises of a listing of entries of links to other pages in your website. In order to populate the A to Z Listing module with these entries, you must find each page which you wish to list, and add them individually to the list.

1. Locate a page which you wish to become a link entry in the A-Z Listing module in the **Site Structure** and select it.



> **Note:** *The "General Information" tab for this page will load*

2. Scroll down to the **Custom Fields section.**



- Select the A-Z Listings checkbox, which enables/disables this page from appearing as a list entry in the A to Z module.
- Select the letters you wish this page to appear under in the A to Z Listing module.

> **Note:** *hold the "ctrl" key to select more than one letter for this item to appear under.*

- Enter a description for the page. This description will only appear next to the link entry in the A-Z Listing page, and is different from the main description of this page.

3. Click the **Save** button. This page will now become an entry in the A to Z Listing module, wherever it has been used within your site. If you chose for this page to be listed under separate letters, then it will be the relevant number of times under each letter heading.

> **Note:** *The standard scheduling/enabling features of pages will apply to the A to Z Listing module. i.e. if a page is scheduled to be removed from the site at a particular date, or the page is manually disabled, then the A to Z Listing entries for that page will also be removed at the same time. This means you don't need to remember to remove the links to an old page from the A to Z Listing!*

Example: One A to Z listing entry for a particular page

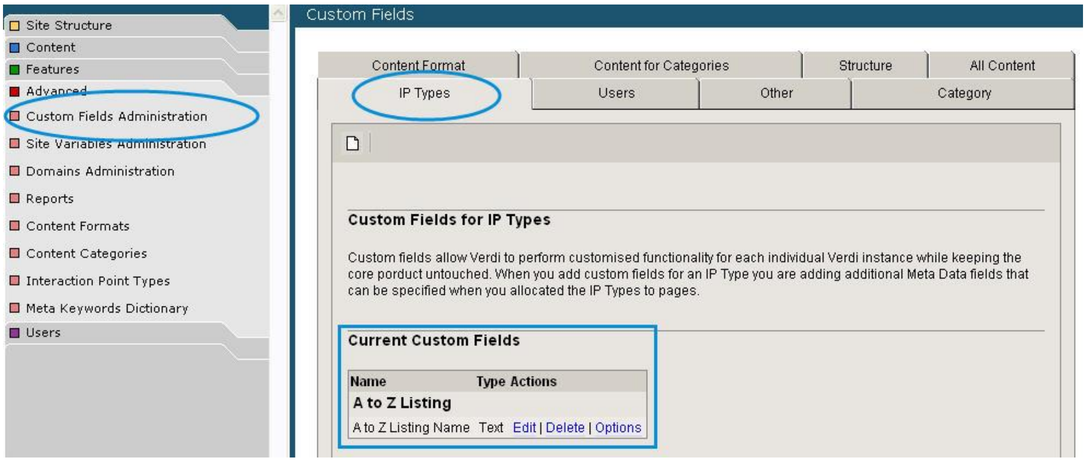
4. Continue from step 1 for any other page you would like displayed in the A-Z Listing.

5.4 A – Z Listing Module – Advanced Site Administration

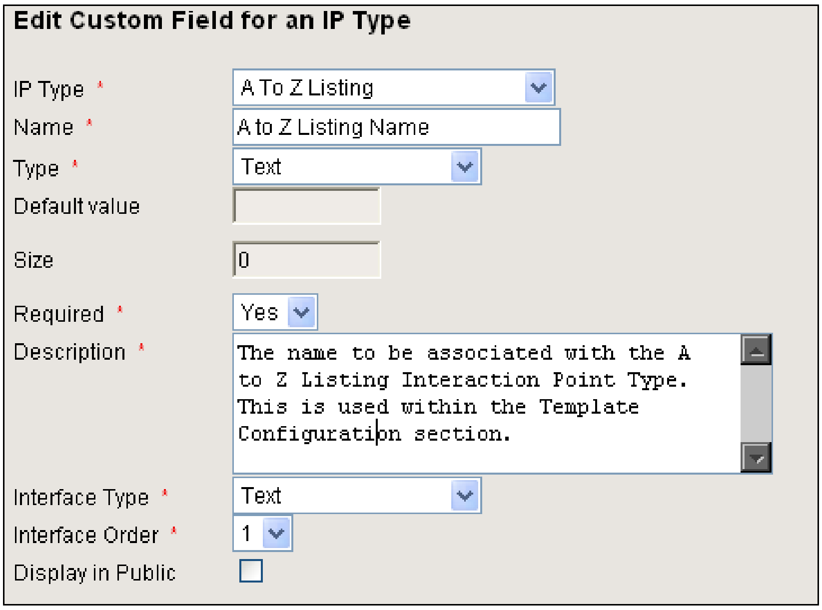
This information has been provided as reference and is only applicable to Site Administrators interested in customising the A to Z Listing module settings.

5.4.1 Custom IP Type (Modules)

The **IP Types (Modules)** tab located under **Advanced** > **Custom Fields Administration** shows the **A-Z Listing Module**.



By editing the **A-Z List**, Site Administrators will be able to see the defined configurations.

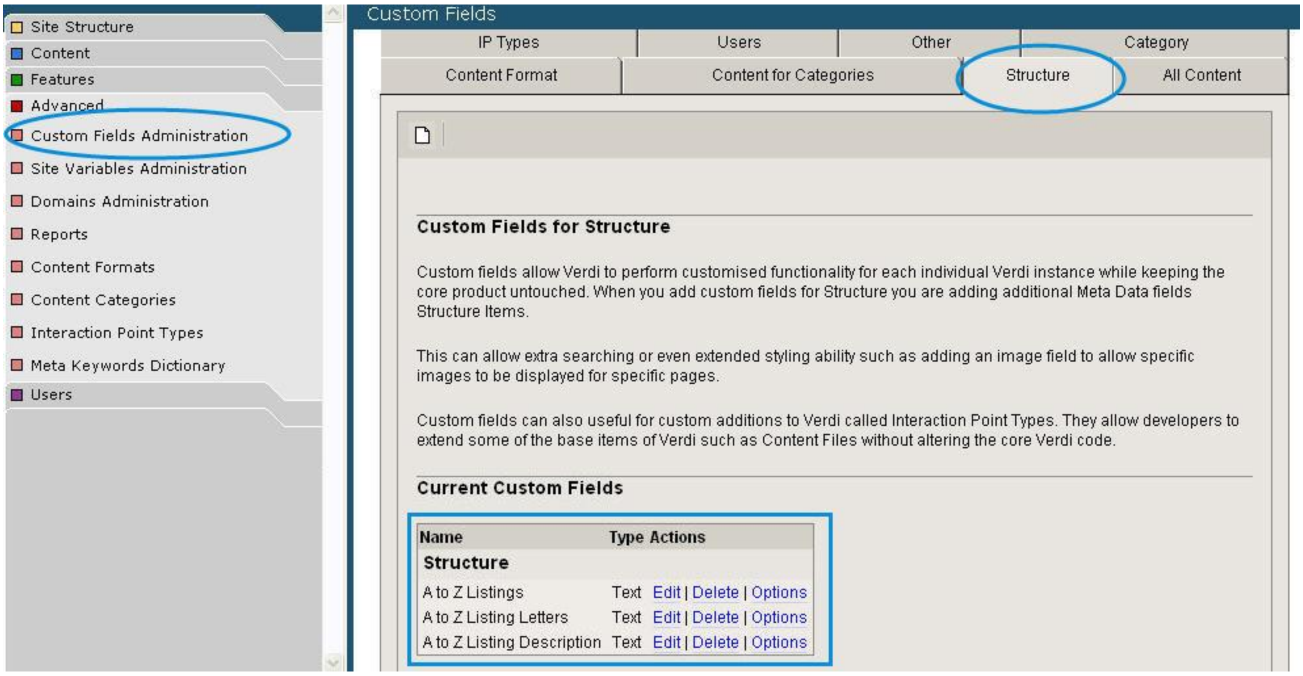


***Note:** Only site administrators will ever be required to edit this customisation and then, infrequently if at all. This information is therefore provided for your reference only.*

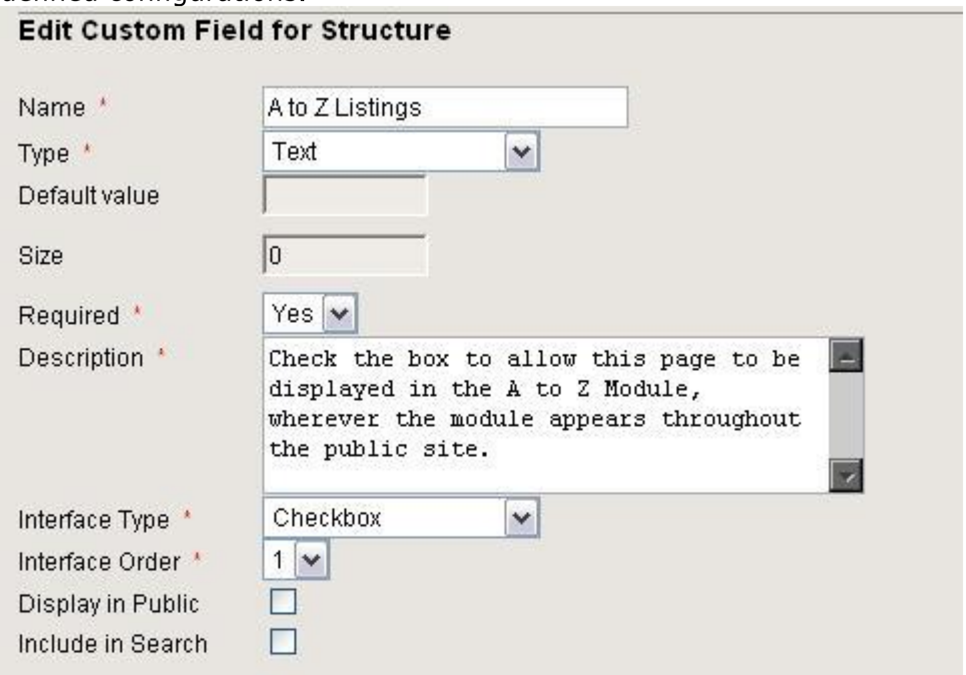
5.4.2 Custom Fields

Custom Fields have been created to allow Site Administrators to define content that will appear in the lists.

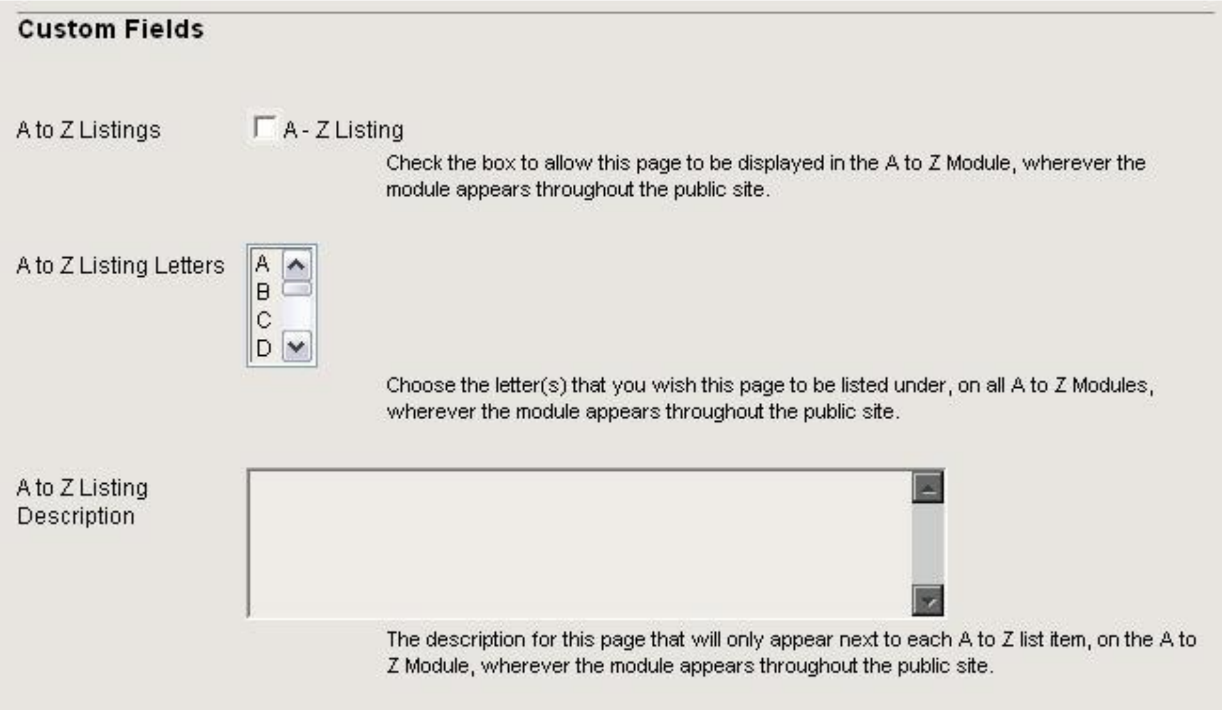
The **Structure** tab located under **Advanced** > **Custom Fields Administration** shows the **A-Z Custom Fields**.



By editing the individual **Custom Fields**, Site Administrators will be able to see and edit the defined configurations.



The **Custom Fields** appear on the **General** tab when editing each page *(more on this in Section 3).*



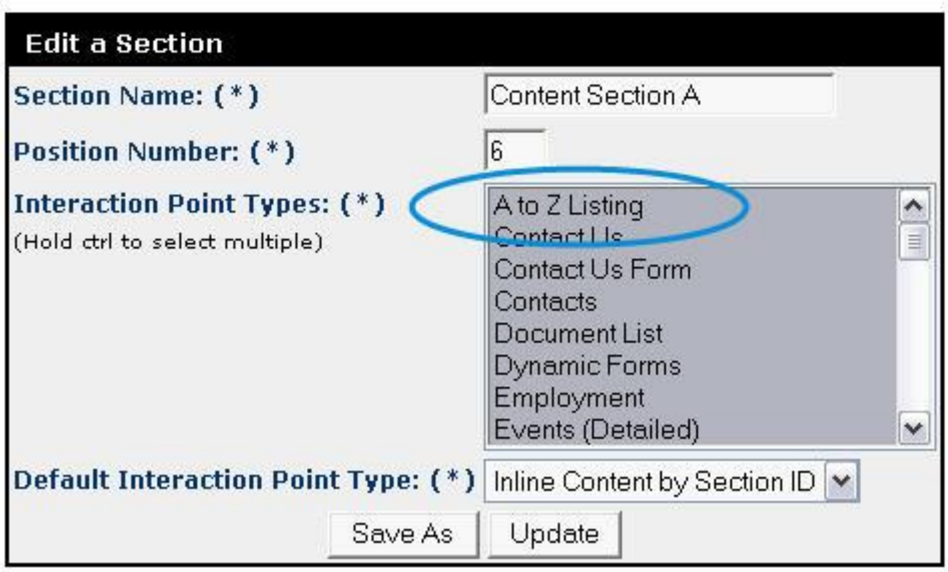
Note: *Only site administrators will ever be required to edit this customisation and then, infrequently if at all. This information is therefore provided for your reference only.*

5.4.3 Configuring Template Sections

As with any other Module in Verdi, the relevant template must be configured correctly in order to allow Site Structure administrators to choose the A to Z Listing on their pages.

The number of templates available depends on your site. An example template is shown below:

Each template is configured to allow the **A-Z Module** (and other modules) to display in the **Sections** required during the set up of the site. The example below shows section 6 has already been configured to display the A-Z Listing.



You can hold down the CTRL key to select/deselect as many modules (including the A to Z Listing module) as you would like for each template section. Once saved, this will then be reflected in the dropdown for each section, available to site structure administrators when they edit the template settings for each page of the website.

6 Content Approval and Workflows

6.1 Overview

This section explains in detail how content is approved within Verdi, and how that is managed with workflows.

6.1.1 Content Approval

Each time a content editor creates a new content item, or modifies an existing content item, they are creating a new **version** of that content item.

Before that version of that content item can be used on the website, it must first be approved (published) by a Verdi User(s) with **publishing** permissions. Up until the point of approval, the previously approved version of this content item will continue to be displayed (or none at all if this is a new content item).

6.1.2 What is an approval workflow?

An approval workflow is a process which allows content to be published in a managed way, by pre-defined Verdi Users with relevant permissions.

Allowing content to be created by one group of Verdi users, and published by another group, is an effective way of extending the natural business roles within your organisation into publishing content onto your website, and thus allowing for checks and balances to be in place to monitor and manage how your business communicates.

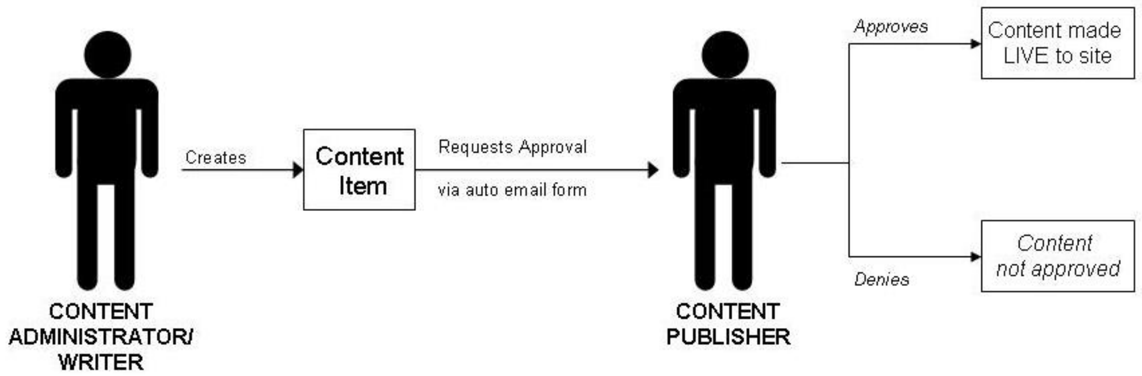
Verdi uses one of two workflow systems, depending how your particular system is set up; either **Verdi Standard Workflow** or **Verdi Advanced Workflow**. If your system has Verdi Standard Workflow at present, this can be upgraded by installing and configuring the Advanced Workflow module.

6.2 Verdi Standard Workflow

Verdi Standard Workflow is the process through which Content Editors can request that their content be approved by Content Publishers.

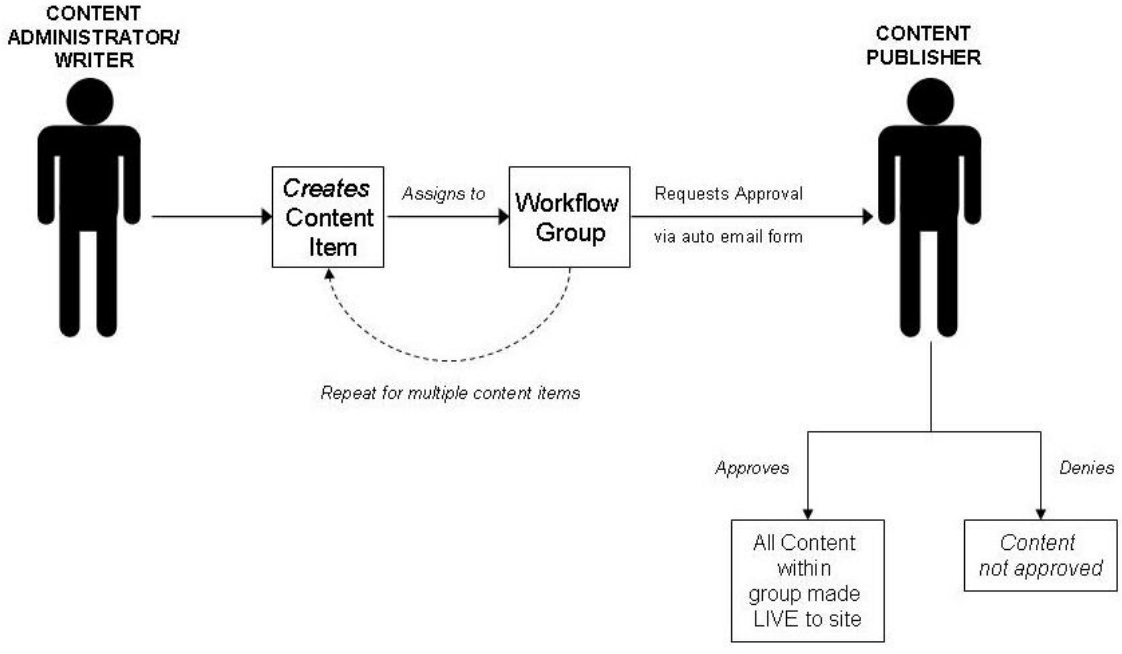
6.2.1 Overview

Approving individual content items with default workflow:
To get a single item of content approved, first a content editor must **request** that a Verdi Content Publisher user **review** their content, and either **Approve** or **Deny** that it be published. E.g.



Approving groups of content items with default workflow:

Alternatively, a content editor can choose to request a group of content items be reviewed, and therefore approved or denied as one decision. E.g.



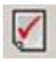
6.2.2 Approving individual content items with standard workflow

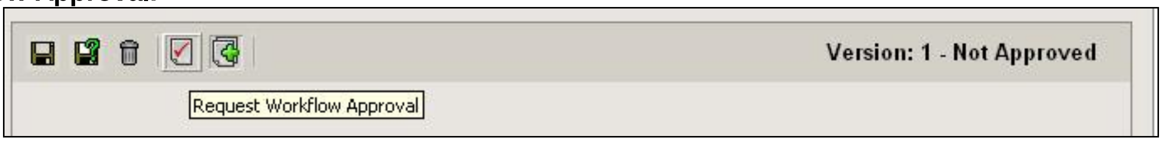
The process of a Content Editor requesting approval for an individual content item is shown below;

1. Content Editor – creates or edits a content item. Note: this version of the content item is still effectively unapproved and is not shown on the public website, until the content is approved at point 6 below
2. Content Editor – requests approval for the content item
3. Content Editor – chooses one or more publishers to request approval from
4. Content Publisher – receives the request
5. Content Publisher – can review the content item
6. Content Publisher – can either approve or deny that it be published

Content Editor – creates or edits a content item.

e.g. in this example a new content item has been created and saved, and is therefore **Version 1 – not Approved**.

Content Editor - requests approval for the content item, by selecting the  **icon to Request Workflow Approval.**

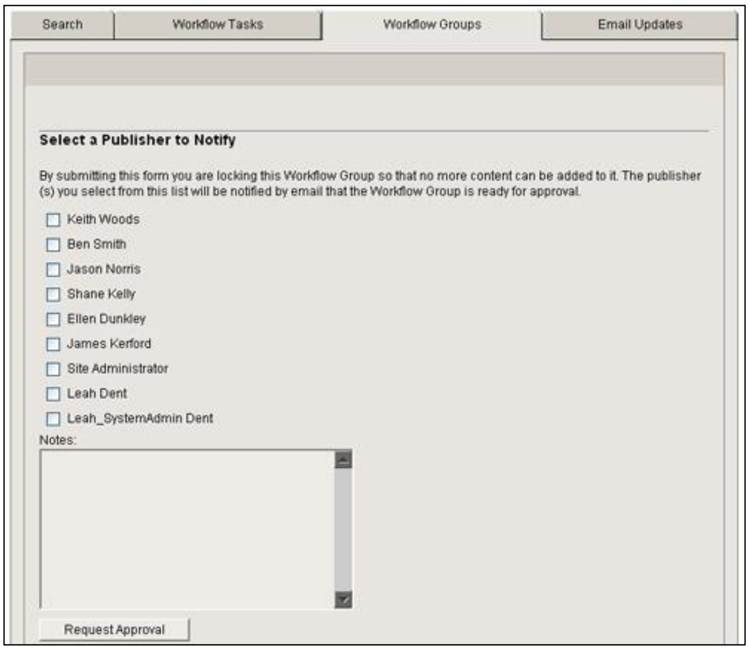


.

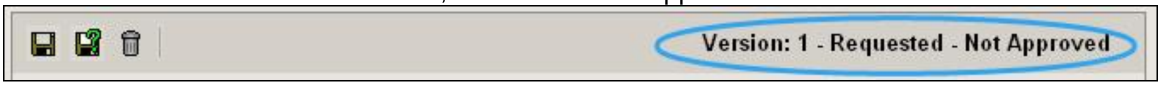
Content Editor - chooses one or more publishers to request approval from.

The 'select a 'Publisher to Notify' screen will be displayed (as below). Using this screen you can select a publisher you wish to notify to approve your content and make live to the public site

a. Tick the publisher(s) you wish to approve your content. Only one publisher can approve your content. (This list of publishers is made up of any administration user who has permission to perform publishing activities to the site. You can select more than one to increase the chances of one of the publishers reviewing and approving your content.)
b. Enter any notes or comments in the free text field
c. Select the ***Request Approval*** button.



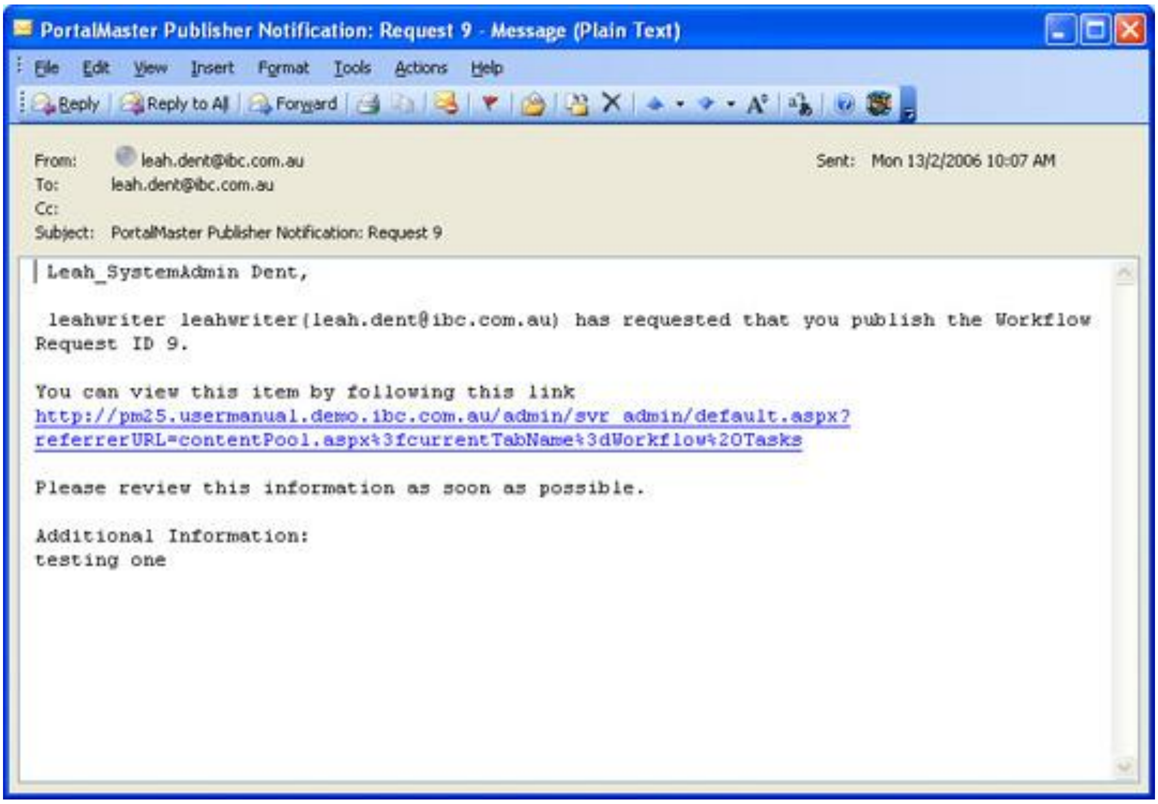
d. The content item status will now display as ***Requested - Not Approved**.* This is how that status of this item will remain, until it has been approved or denied.



e. An email will be sent to the selected publishers with links and details of the content to be approved.

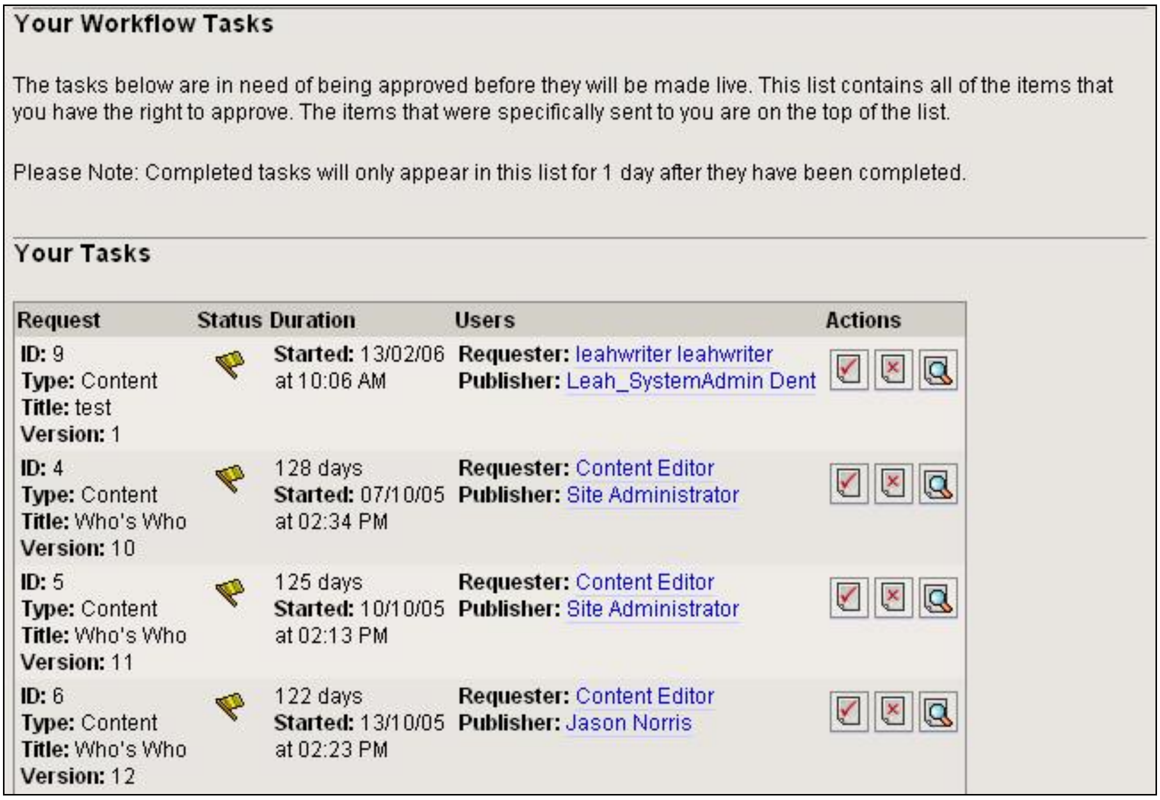
Content Publisher – receives the request.

An email is automatically sent to the publisher by Verdi, noting the Content Editor who is requesting approval, and a link to the content in question.

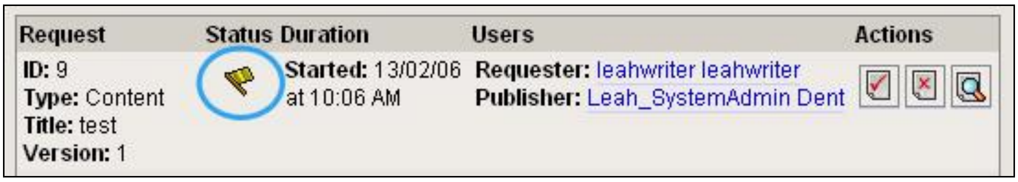


Content Publisher – can review the content item

f. Select the hyperlink to view the content item.
g. The Verdi browser window opens and asks for the Publisher's Log In details.
h. Verdi opens at the ***Your Workflow Tasks*** screen. *(Note: You can navigate to this screen without having to click on the link in your email by using the Verdi Administration left navigation, content tab, and clicking Content Administration, then Workflow Tasks tab):*



This page lists all the content items which this Content Publisher has been asked to approve.



Note that the Status Flag colour denotes the following:

- **Yellow:** Awaiting Publisher Approval
- **Red:** Denied Publisher Approval
- **Green**: Approved item.

i. To review the content before you deny or approve for publishing, select the magnifying glass icon.

Content Publisher – can either approve or deny that it be published.

j. To approve the content, select the approve icon.

k. To deny the content to be published, select the deny icon.

6.2.3 Approving groups of content items with default workflow:

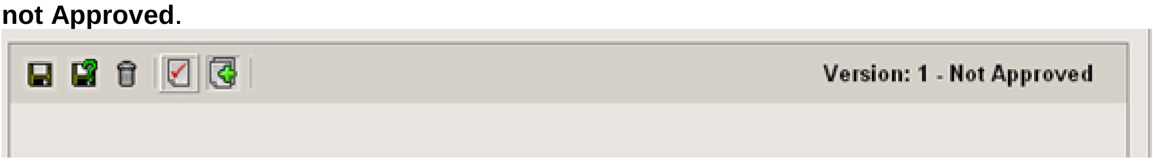
Workflow Groups are used to speed up the workflow approval process when requesting approval for multiple pieces of content. All content within the workflow group will be considered as one item for the workflow process and can only be approved as a group.

1. Content Editor – creates or edits a content item
2. Content Editor – adds content item to a workflow group
3. Content Editor – goes back to step 1 until all content is created/updated, and added to the group
4. Content Editor – requests approval of workflow group
5. Content Editor – chooses one or more publishers to request approval from
6. Content Publisher – receives the request
7. Content Publisher – can review the content group, and each content item within
8. Content Publisher – can approve the content group to be published

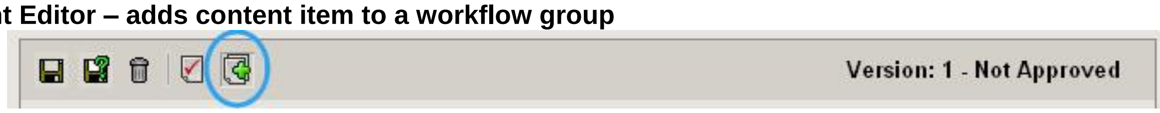
Assigning a Content Item to a Workflow Group

Content Editor – creates or edits a content item

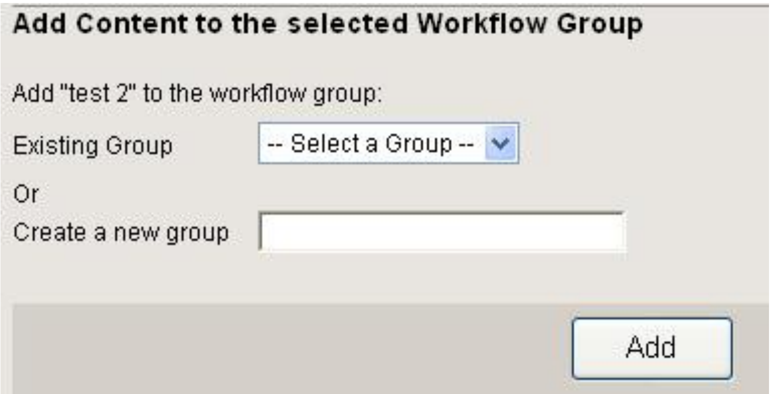
e.g. in this example a new content item has been created and saved, and is therefore **Version 1 – not Approved**.



Content Editor – adds content item to a workflow group



1. Select the Workflow Group icon
2. The 'Add Content to the selected Workflow Group' will load



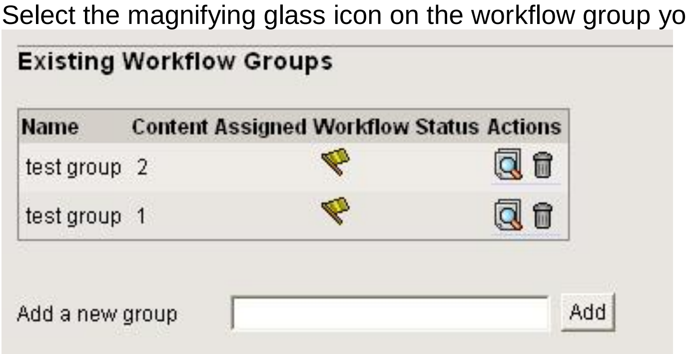
3. Select an existing workflow group using the drop down
4. OR create a new group by entering the group name in the provided text field
5. Select the Add button
6. The ‘About Workflow Groups’ screen will then load.

Your content has now been assigned to a workflow group.

Content Editor – goes back to step 1 until all content is created/updated, and added to the group

Content Editor - Requests Approval of Workflow Groups

1. Select the magnifying glass icon on the workflow group you wish to request approval for.

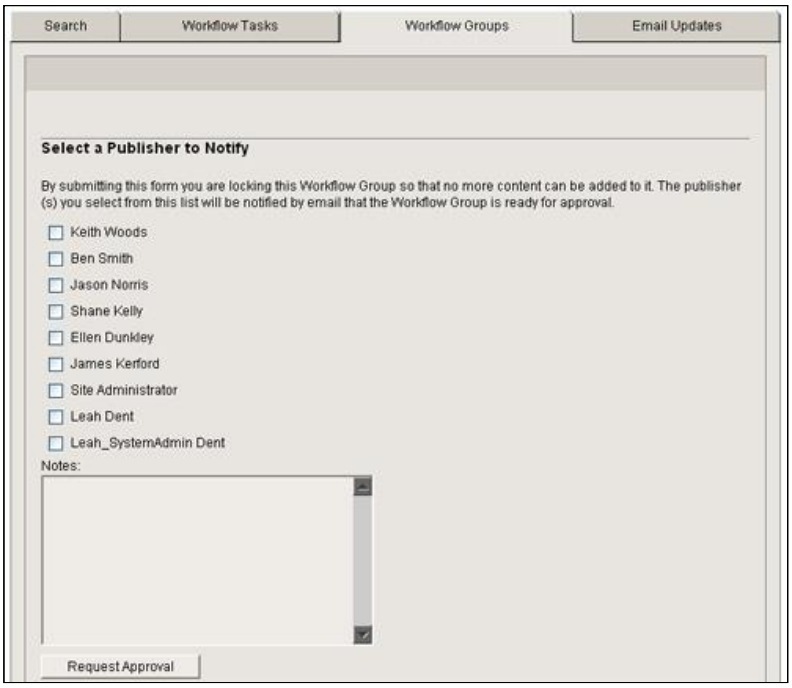


2. The workflow group’s screen will load, displaying all the content items that belong to the group. You can view, modify and delete content items from this screen.

3. Select the Request Approval button

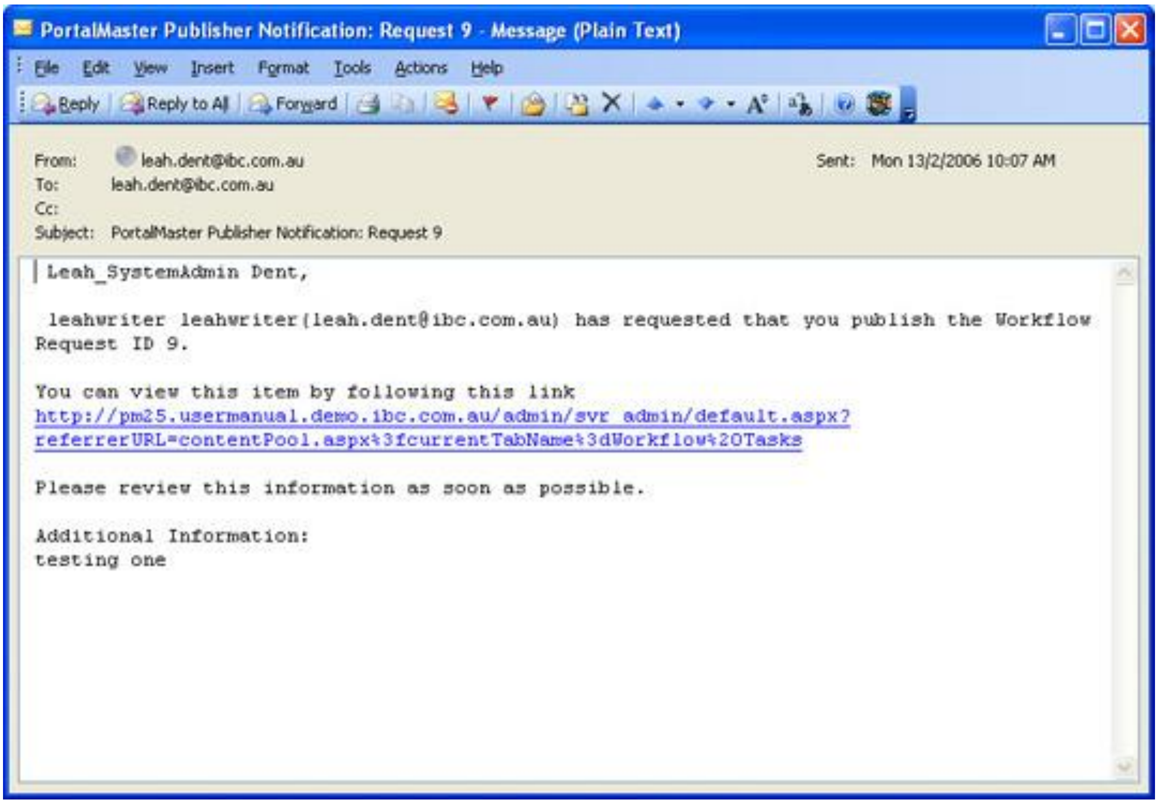
Content Editor – chooses one or more publishers to request approval from

The 'select a 'Publisher to Notify' screen will be displayed (as below). Using this screen you can select a publisher you wish to notify to approve your content and make live to the public site



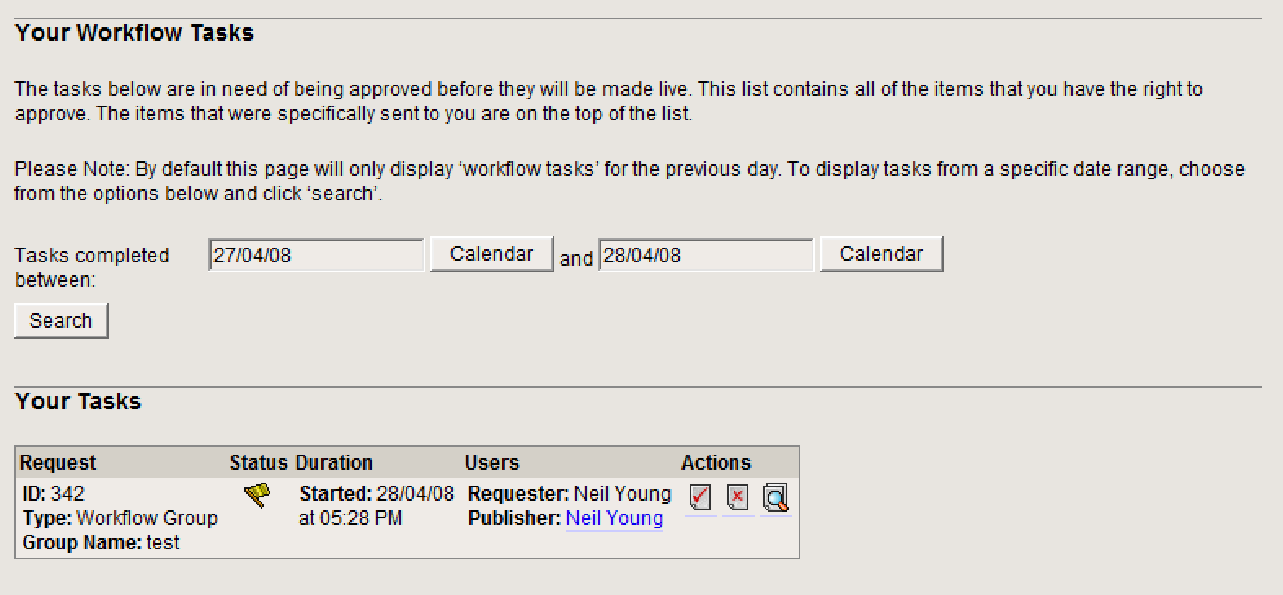
a. Tick the publisher(s) you wish to approve your content. Only one publisher can approve your content. (This list of publishers is made up of any administration user who has permission to perform publishing activities to the site. You can select more than one to increase the chances of one of the publishers reviewing and approving your content.)
b. Enter any notes or comments in the free text field
c. Select the ***Request Approval*** button.
d. An email will be sent to the selected publishers with links and details of the content to be approved.

Content Publisher – receives the request
An email is automatically sent to the publisher by Verdi, noting the Content Editor who is requesting approval, and a link to the content in question.



Content Publisher – can review the workflow group, and each content item within

a. Select the hyperlink to view the content item.
b. The Verdi browser window opens and asks for the Publisher's Log In details.
c. Verdi opens at the ***Your Workflow Tasks*** screen. *(Note: You can navigate to this screen without having to click on the link in your email by using the Verdi Administration left navigation, content tab, and clicking Content Administration, then Workflow Tasks tab):*

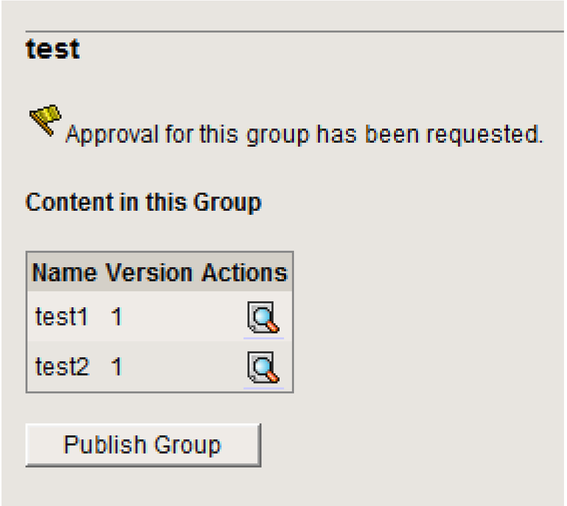


The Status Flag colour denotes the following:

- **Yellow:** Awaiting Publisher Approval
- **Red:** Denied Publisher Approval
- **Green**: Approved item.

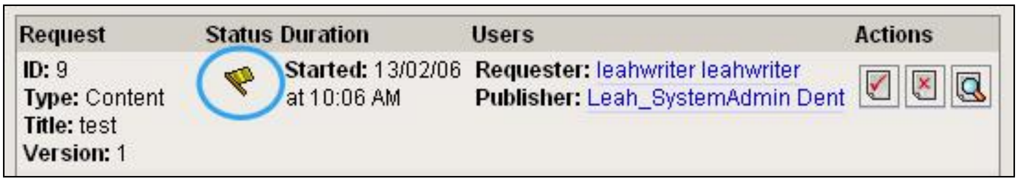
1. Select the magnifying glass icon on the workflow group you wish to review for approval.

2. The workflow group's screen will load, displaying all the content items that belong to the group. You can view each content item from this screen, by clicking the magnifying glass next to each item.



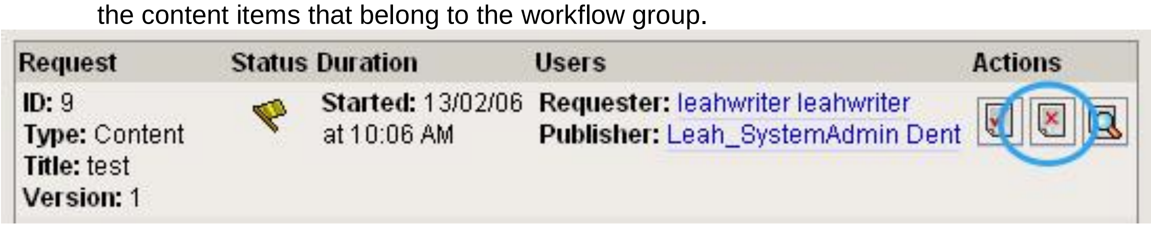
Content Publisher – can approve or deny that the content group be published

1. You can Approve/Publish this whole group in one of two ways:
    a. Select the **Publish Group** button to approve all the content in this group, or
    b. Go back to the **Workflow tasks** tab



To approve the content select the approve icon. This will approve all the content items that belong to the workflow group.

2. To deny the content to be published (Without viewing it), select the deny icon. This will deny all the content items that belong to the workflow group.



6.3 Verdi Advanced Workflow

This is a similar process to default workflow, with much more flexibility.

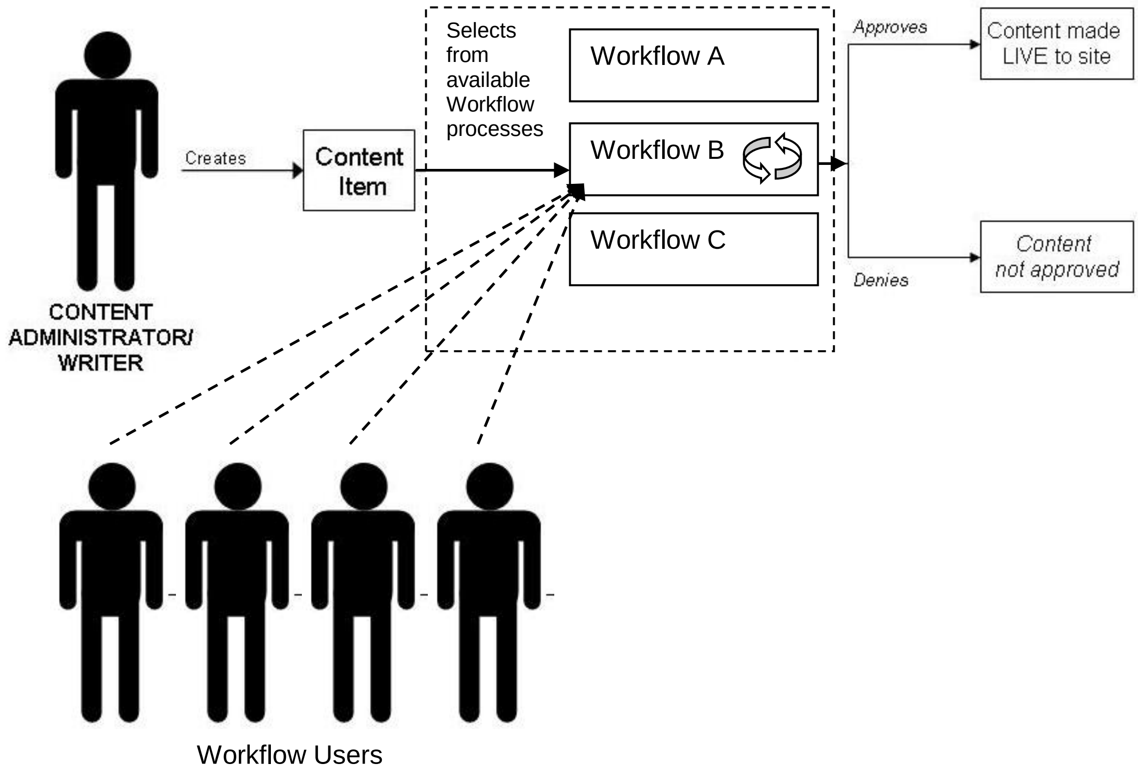
Verdi Advanced Workflow is the process through which Content Editors can request that their content be approved by Content Publishers using a pre-designed workflow process, rather than just a single Publisher as in Verdi Default Workflow.

6.3.1 Overview

Approving individual content items with advanced workflow::
To get a single item of content approved, first a content editor must **select** for their content to be processed by one of a range of available **Advanced Workflow Processes**, which in turn performs a series of **activities** (see below) to decide if the content is **approved** or **denied** for **publishing**.

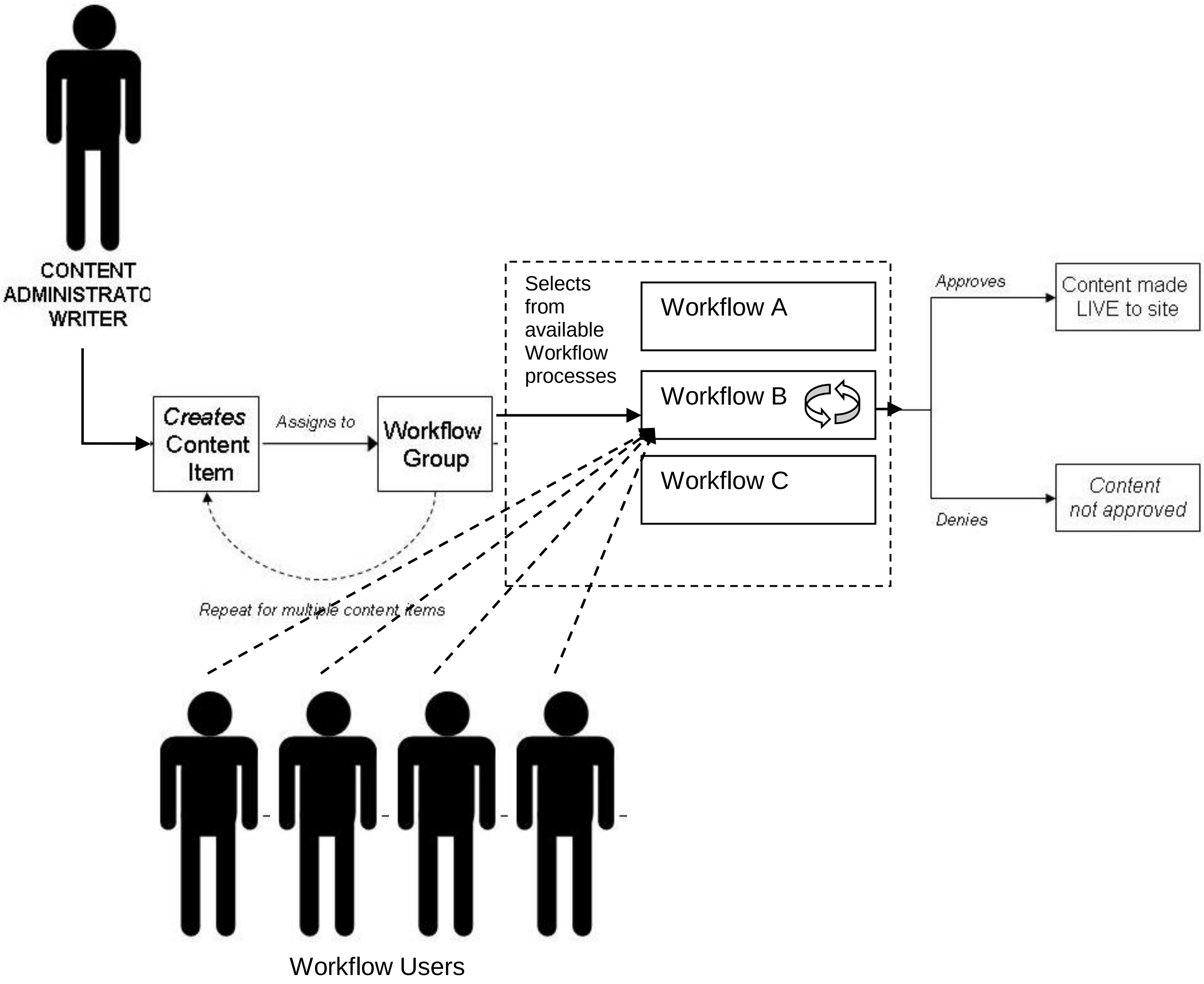
Each Advanced Workflow process can be designed to be simple or complex, and similar to other workflows or completely different, but will always comprise of three main steps:

1. **An input** = the content item to be processed
2. **A process** = the design of the workflow itself, defining a flow of **activities**.
   Each action typically requires a Content Publisher to:
   - **Accept** responsibility for completing the action
   - **Review** the content
   - **Approve or deny** the content.
     (Note: the Publisher is simply approving or denying this single step in the workflow. This action will not necessarily immediately result in the content item itself being Published)
3. **An Output** = once each Publisher has performed their action, and all the steps within the workflow have completed, then the content item will either be **approved**, and therefore **published,** or **denied** and not published.



Approving Groups of content items with advanced workflow:

Alternatively, a content editor can choose to request a group of content items be reviewed, and therefore approved or denied as one decision. This works in a similar way to individual content items, but again, replacing the choice of Publisher with a choice of Workflows.



The Advanced Workflow Process

The flowchart below in **diagram 1** shows more detail on how the generic workflow process works, and begins in the Orange middle row, first box titled "**Create Content**".

Note that the design of each Advanced Workflow will be pre-determined for your website, and this is represented by the bottom blue row. So, this blue row represents one 'workflow activity', of which there may be many, interlinked, and requiring different groups of workflow users to be involved at various stages, as in **diagram 2**, which shows an example workflow process.

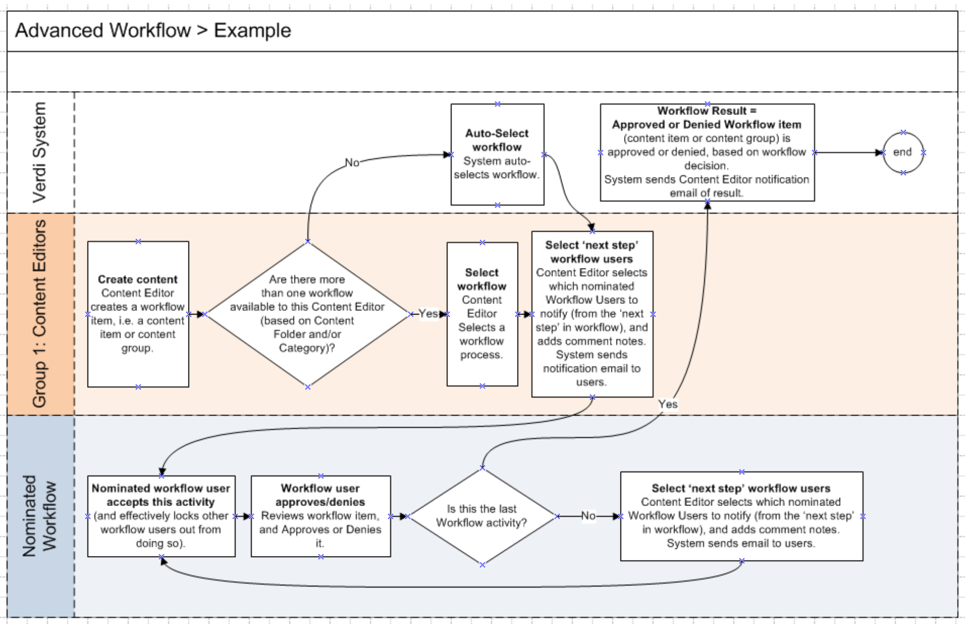


Diagram 1

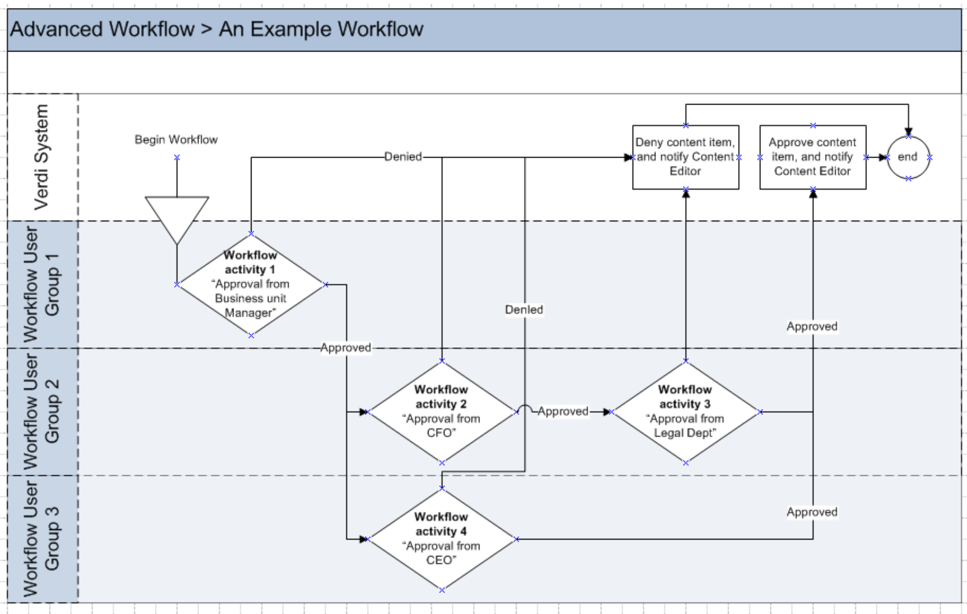


Diagram 2:

- A workflow process is defined as a flowchart of **activities** (shown as white boxes).
- Each activity is linked by one or more lines called **transitions**, which describe how the process flows from one activity to another.
- The activities are organised into rows, showing which **group of workflow users** have permission to affect each activity. In Verdi, these roles are pre-determined to be integrated with various **User Groups**. Therefore, each row in the diagram, relates to one **User Group** in Verdi.

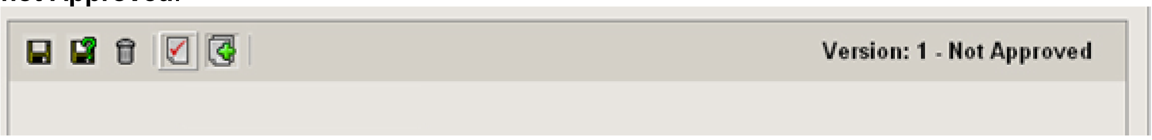
6.3.2 Approving individual content items with Advanced Workflow

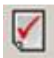
The process of a Content Editor requesting approval for an individual content item, and workflow users approving or denying is shown below;

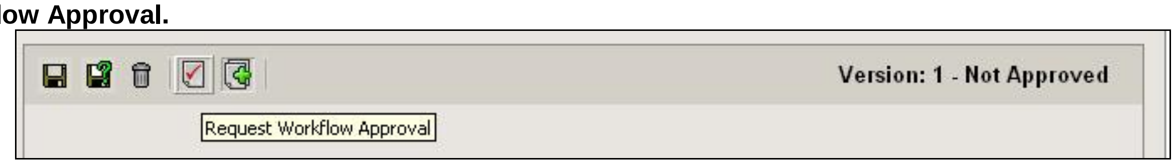
1. Content Editor – creates or edits a content item. Note: this version of the content item is still effectively unapproved and is not shown on the public website, until the content is approved at point 6 below.
2. Content Editor – requests approval for the content item.
3. Content Editor – chooses one or more advanced workflow processes to send the request to.
4. Content Editor – chooses one or more advanced workflow users to send the request to.
5. Selected Advanced Workflow Process – performs the following steps for each workflow activity:
    a. Workflow user(s) – receive an email notification to request them to review content.
    b. Workflow user(s) – can review the content item.
    c. Workflow user – can choose to accept responsibility for approving/denying the content item.
    d. Workflow user(s) – can either approve or deny that it be published.
6. Selected Advanced Workflow Process – finally approves or denies content item.
7. Content Editor – receives email notification of the approval or denial.

Content Editor – creates or edits a content item.

e.g. in this example a new content item has been created and saved, and is therefore **Version 1 – not Approved**.



Content Editor - requests approval for the content item, by selecting the  icon to Request Workflow Approval.



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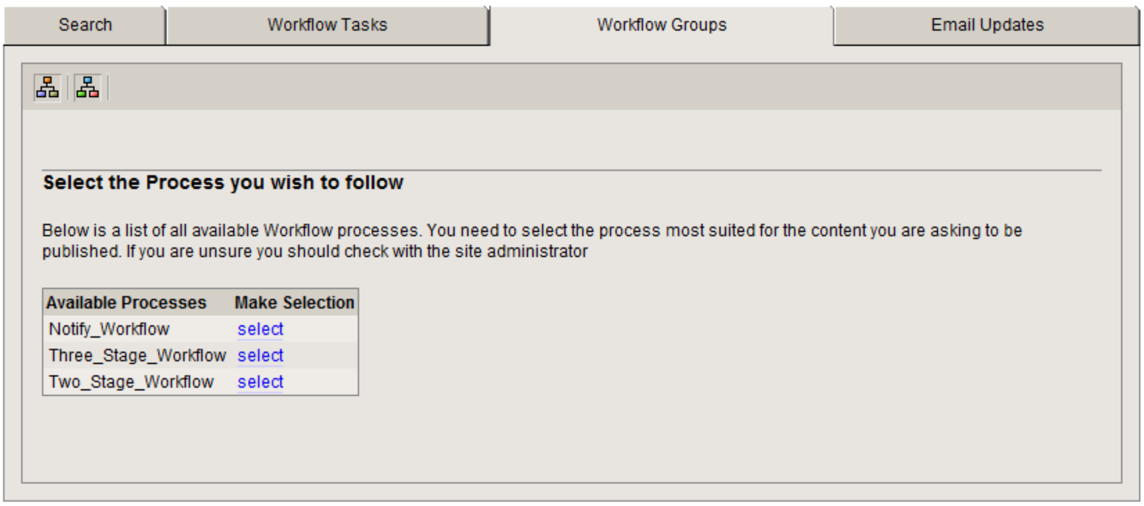
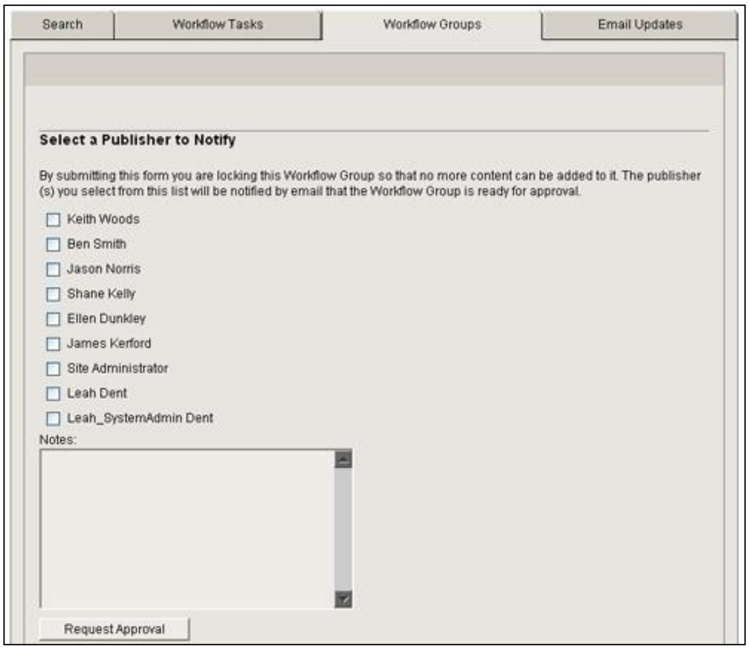
Content Editor - chooses one or more workflow processes to send the request to.

The 'Select the Process you wish to follow' screen will be displayed (as below). Using this screen you can click **select** next to the most appropriate workflow process for your content item. *Note this screen will not be shown if there is only one Workflow process for your system, as the system will auto-select this for you.*

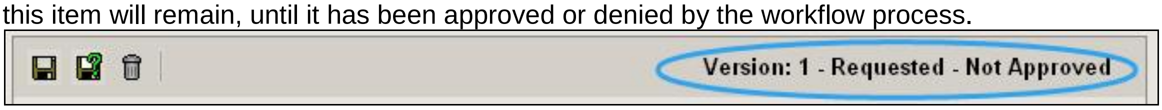


Content Editor - chooses one or more workflow users to send the request to.

a. Tick the workflow user(s) you wish to approve your content. (This list is made up out of the relevant workflow users, who have permissions to the first workflow **activity.** You can select more than one to increase the chances of one of the workflow users reviewing and approving your content.)
b. Enter any notes or comments in the free text field
c. Select the ***Request Approval*** button.



The content item status will now display as ***Requested - Not Approved**.* This is how that status of this item will remain, until it has been approved or denied by the workflow process.

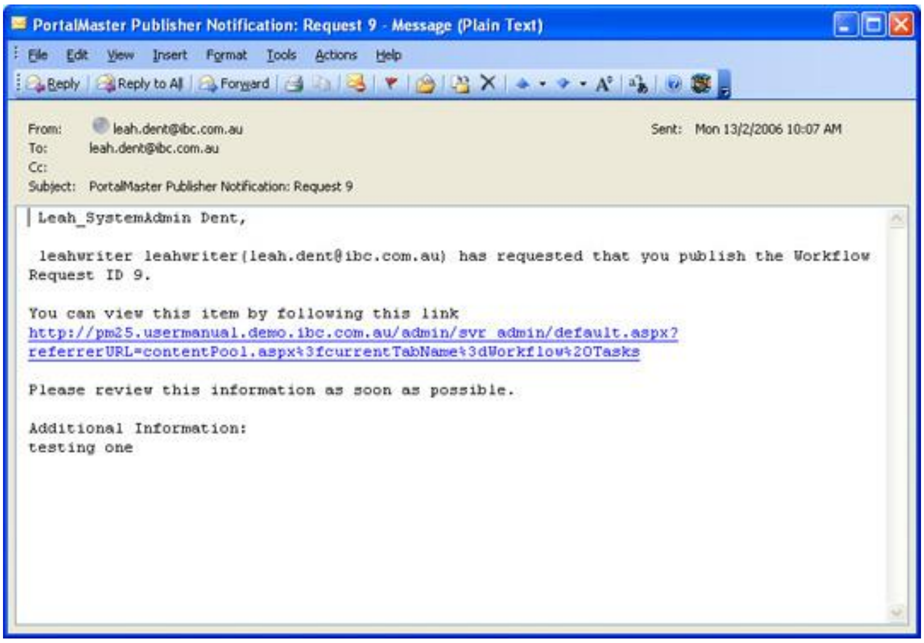


The Selected Advanced Workflow Process – performs the following 4 steps for each workflow activity in the process

Once the following four steps have been carried out, the workflow process will move onto the next activity it is programmed for, and will repeat these four steps again, until finally all the activities of the workflow have been exhausted.

6.3.2.1.1 Workflow user(s) – receive an email notification to request them to review content

An email will be sent to the selected workflow user(s) with links and details of the content to be reviewed and approved.

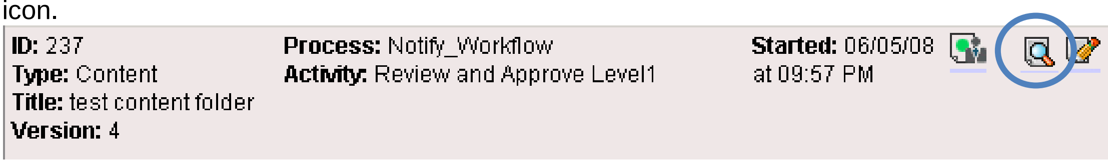

PortalMaster Publisher Notification: Request 9 - Message (Plain Text)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: leah.dent@ibc.com.au
Sent: Mon 13/2/2006 10:07 AM
To: leah.dent@ibc.com.au
Cc:
Subject: PortalMaster Publisher Notification: Request 9
Leah_SystemAdmin Dent,
leahwriter leahwriter(leah.dent@ibc.com.au) has requested that you publish the Workflow Request ID 9.
You can view this item by following this link
http://pm25.usermanual.demo.ibc.com.au/admin/svr_admin/default.aspx?referrerURL=contentPool.aspx%3fcurrentTabName%3dWorkflow%20Tasks
Please review this information as soon as possible.
Additional Information:
testing one

6.3.2.1.2 Workflow user(s) – can review the content item

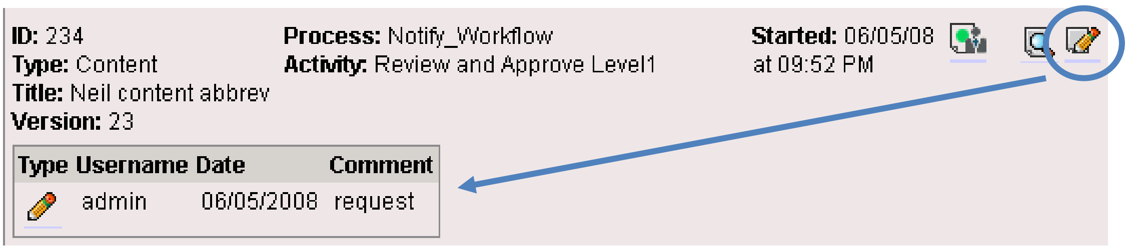
a. Select the hyperlink to view the content item.
b. The Verdi browser window opens and asks for the Workflow user(s)' Log In details.
c. Verdi opens at the ***Workflow Tasks*** screen. *(Note: You can navigate to this screen without having to click on the link in your email by using the Verdi Administration left navigation, content tab, and clicking Content Administration, then Workflow Tasks tab):*

This page lists all the content items which this Workflow User has been asked to approve.

d. To review the content before you deny or approve for publishing, select the magnifying glass icon.

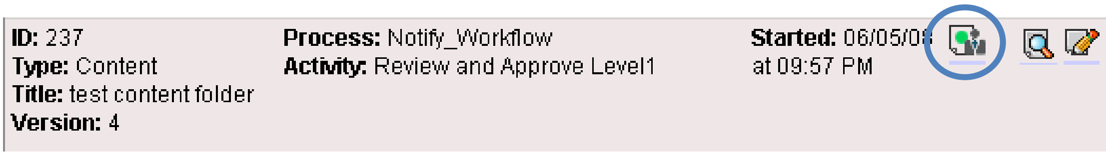


An additional feature exists to allow workflow users to read any notes that previous workflow users or the initial content editor has added. Just click the pencil icon, and a notes panel will display. Also, if you yourself added any of the notes then you will be able to edit them here.

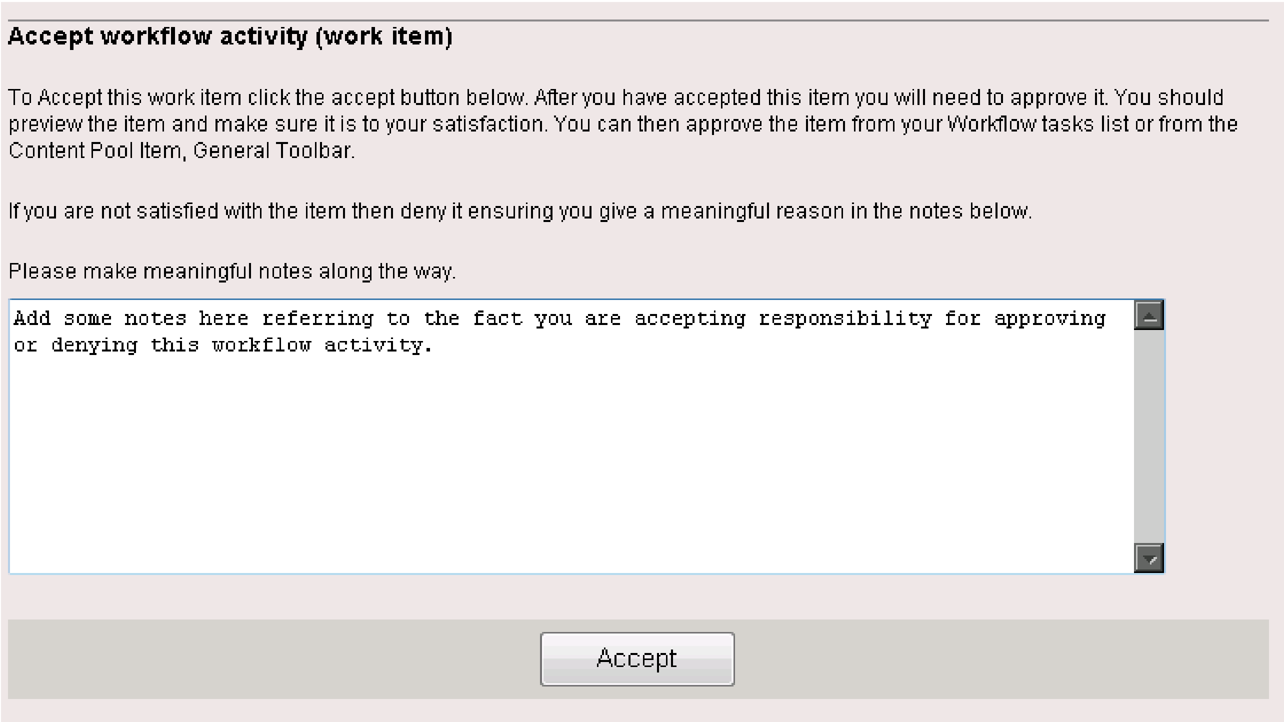


6.3.2.1.3 Workflow user – can choose to accept responsibility for approving/denying the content item.

After reading any notes, and reviewing the content you can then choose to **accept** responsibility for approving or denying the content item, by clicking the accept icon.

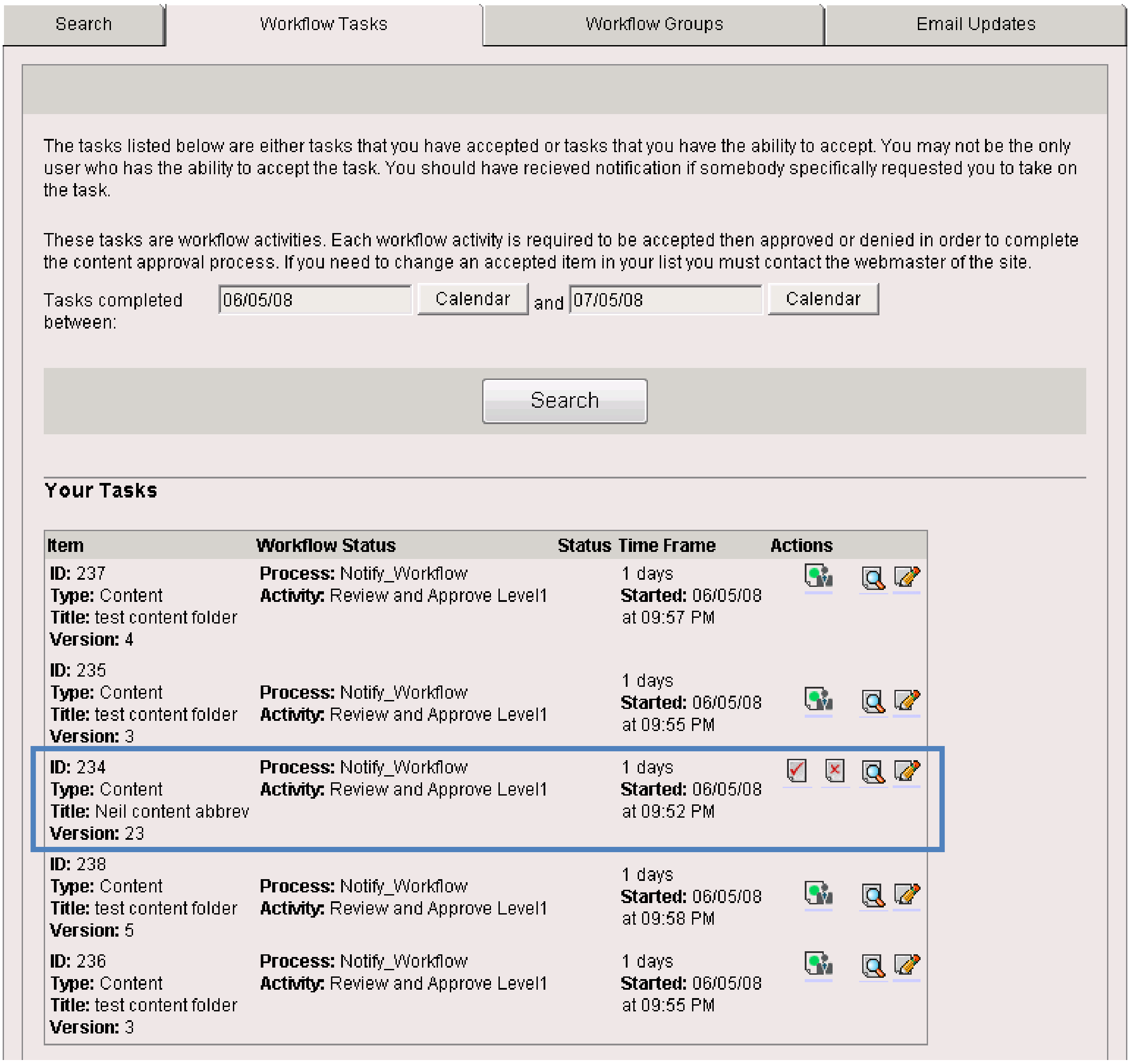


The **Accept workflow activity (work item)** form will then display, allowing you to add notes before you accept the item. Add some notes, then click **Accept**.



6.3.2.1.4 Workflow user(s) – can either approve or deny that it be published.

The Workflow tasks tab will again display, this time with the content item listed with a tick and a cross icon in place of the accept icon. The tick allows you to approve the content item. The cross allows you to deny the content item.

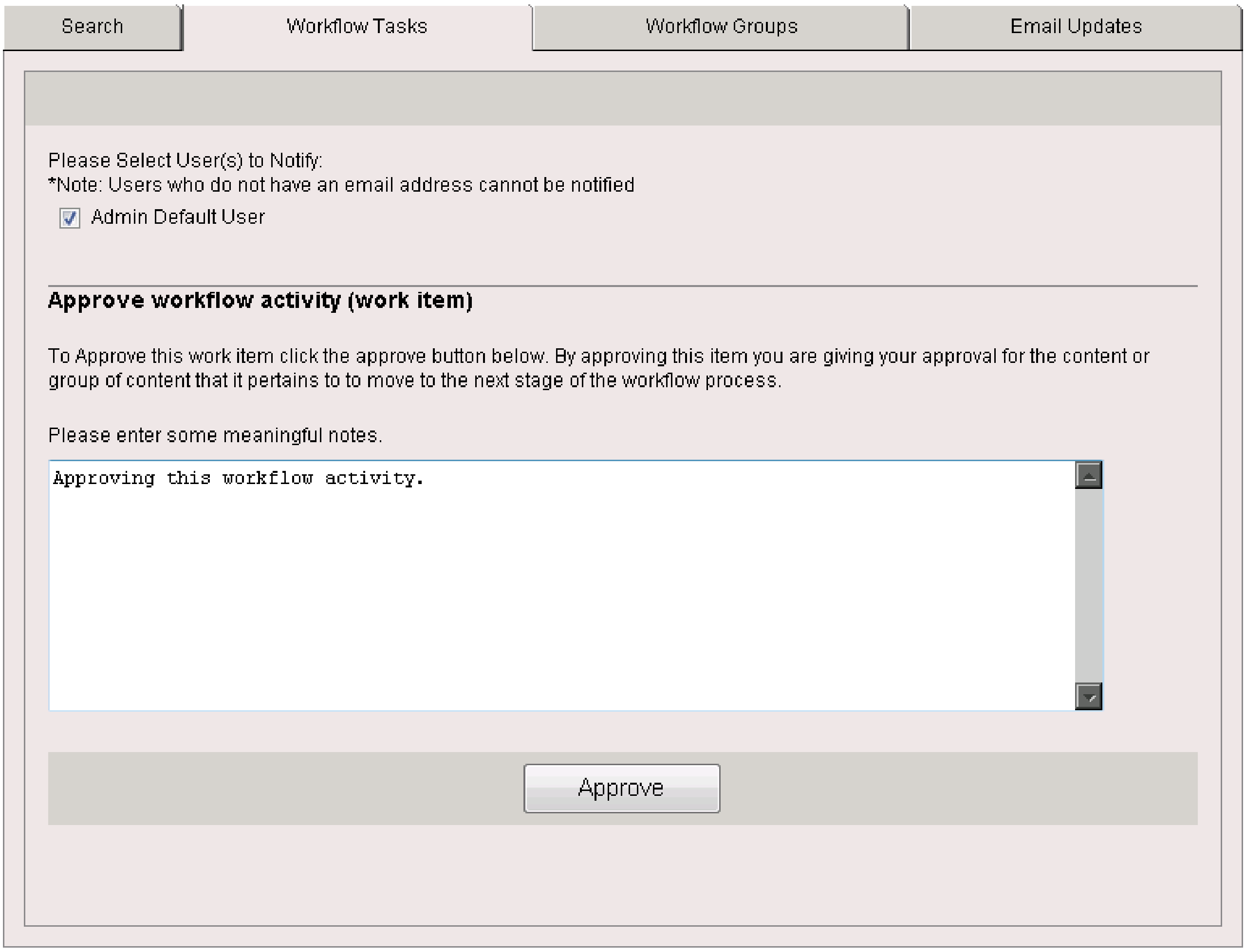


Remember that you are only approving or denying the item as part of your role in the whole workflow process, there may be other workflow users who may have to approve or deny along with you, to create the final decision of whether the content item is approved or not.

By clicking approve, the following form will display, allowing you to choose which of the workflow users from the next step in the workflow process you would like to notify so they can accept the next workflow activity.

They will each be sent an email to notify them, and when they view the Workflow Tasks tab the workflow item will be listed for them to accept in the same manner as shown earlier.

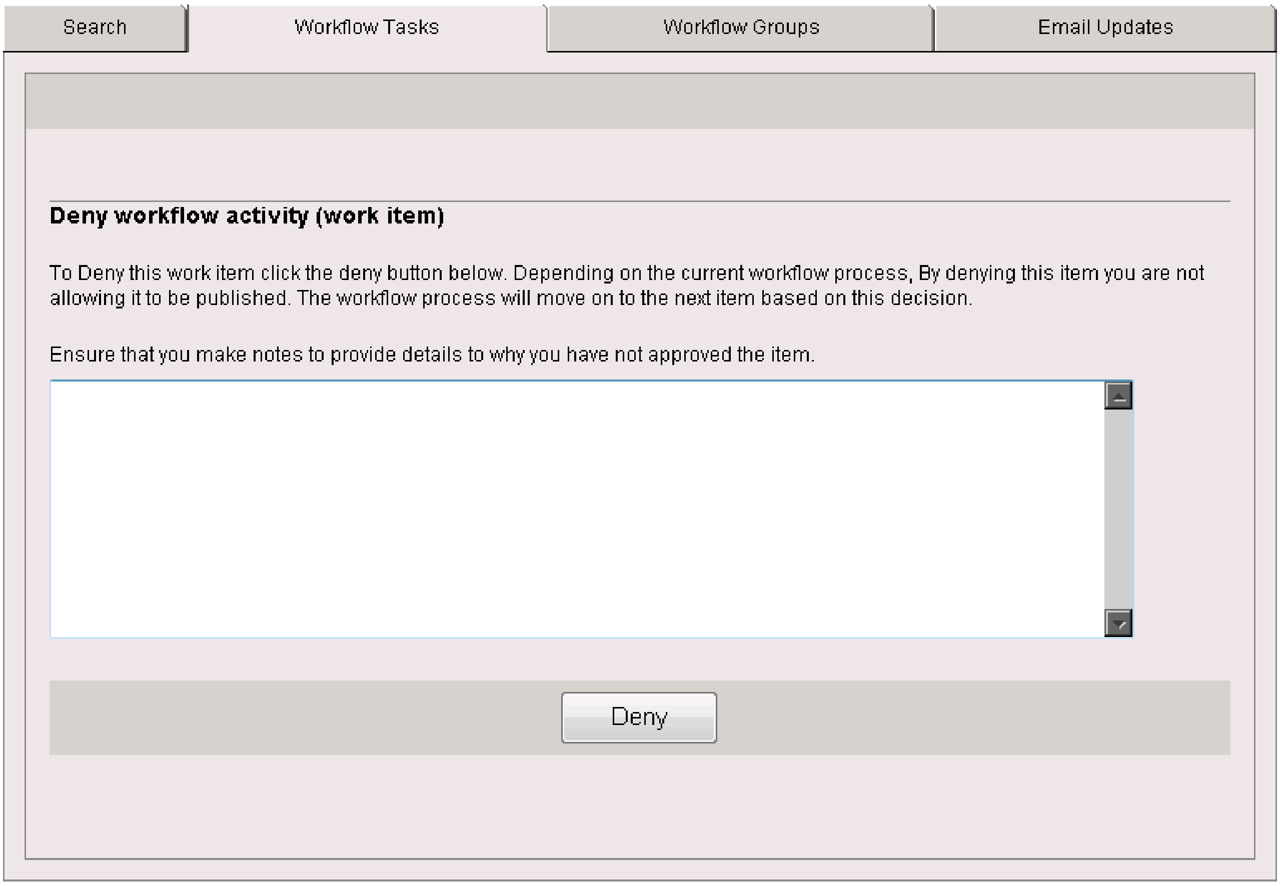
Also, a notes area exists so that useful notes can be left for the next workflow user or the initial content editor.



Clicking approve will again show the **Workflow tasks** tab but with this workflow item removed. If there is a next step in the workflow, this item will display in the relevant workflow users **Workflow tasks** list.

If there is no next step, then this final approval may signal that the overall content item is approved, and the system can move onto the final step explained below titled **Completing the workflow process.**

Denying the item instead of approving it will provide a similar form, such as this.



Clicking Deny will add your notes to this workflow item, and remove the item from your **Workflow tasks** list. The content item may then move on in the workflow to the next activity in the workflow process, and therefore show up in another workflow users **Workflow tasks** list. If so, then workflow will repeat the last four steps again. If not, and this is the last workflow activity in this workflow process, then we move onto he next step.

Selected Advanced Workflow Process – finally approves or denies content item

The end of the workflow process for this content item may be reached, as in the above example, by a denial at any stage of the workflow. Alternatively all the workflow activities may be exhausted, and the system can determine that the content item is approved or denied at that stage.

Therefore the workflow item will be removed from all **Workflow tasks** lists, and the original content item version will now be marked as Approved/Denied.

Content Editor – receives email notification of the approval or denial.

The Content Editor who first requested approval will be notified by email, and will be able to review the notes pertaining to their request to determine what changes, if any, are required to update their content and try again.

e.g. If the original content editor, selects the content item from the email notification they receive, or through Verdi admin, and clicks the **Version control** tab, they can see which versions of their content were approved or denied.

Furthermore, they can click **edit** next to each version, which will display the information for that version in all the relevant tabs, including the notes tab.

General | Advanced | Files | Contacts | Permissions | Notes

Locations | Custom Fields | Preview | Status | Version Control

Version: 23 - Live

Versions

Version	Title	Category	Date Version Created	Live Version	Status	Options
1	Neil content abbrev	Web Content	02/04/2008 17:40:27	No		edit
2	Neil content abbrev	Web Content	02/04/2008 17:43:16	No	Approved	edit
3	Neil content abbrev	Web Content	02/04/2008 23:53:29	No	Approved	edit
4	Neil content abbrev	Web Content	02/04/2008 23:54:24	No	Approved	edit
5	Neil content abbrev	Web Content	03/04/2008 00:17:28	No		edit
6	Neil content abbrev	Web Content	03/04/2008 00:17:51	No		edit
7	Neil content abbrev	Web Content	03/04/2008 00:17:53	No		edit
8	Neil content abbrev	Web Content	07/04/2008 17:00:07	No	Approved	edit
9	Neil content abbrev	Web Content	07/04/2008 17:10:36	No		edit
10	Neil content abbrev	Web Content	07/04/2008 17:10:54	No		edit
11	Neil content abbrev	Web Content	07/04/2008 17:11:02	No	Approved	edit
12	Neil content abbrev	mikes test	08/04/2008 14:43:43	No		edit
13	Neil content abbrev	Web Content	10/04/2008 16:35:54	No	Approved	edit
14	Neil content abbrev	Web Content	10/04/2008 16:37:11	No	Approved	edit
15	Neil content abbrev	Web Content	11/04/2008 09:00:12	No	Approved	edit
16	Neil content abbrev	Web Content	24/04/2008 00:55:00	No		edit
17	Neil content abbrev	Web Content	24/04/2008 02:04:15	No	Approved	edit
18	Neil content abbrev	Web Content	28/04/2008 00:02:46	No		edit
19	Neil content abbrev	Web Content	28/04/2008 11:40:51	No	Requested	edit
20	Neil content abbrev	Web Content	28/04/2008 11:45:34	No	Approved	edit
21	Neil content abbrev	Web Content	29/04/2008 15:01:27	No	Denied	edit
22	Neil content abbrev	Web Content	29/04/2008 15:02:02	No	Approved	edit
23	Neil content abbrev	Web Content	06/05/2008 21:53:30	Yes	Approved	edit

If they then click the notes tab they may see something like this, showing the notes which workflow users have added whilst the content item passed through the workflow process.

Content pool item workflow notes

Type	Username	Date	Comment
	admin	07/05/2008	Add some notes here referring to the fact you are accepting responsibility for approving or denying this workflow activity.
	admin	07/05/2008	comments from workflow user approving item.
	admin	08/05/2008	accepted this item
	admin	08/05/2008	approved this item

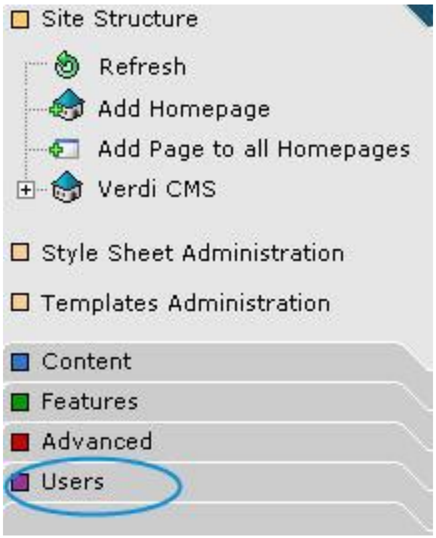
7 Users Administration

The Users area manages the users who have access to the administration area and password protected areas of the public site. Users can be maintained individually or as part of a group.

The Verdi Roles & Activities allows high level system administrators to modify the administration and public permissions.

7.1 Adding a User

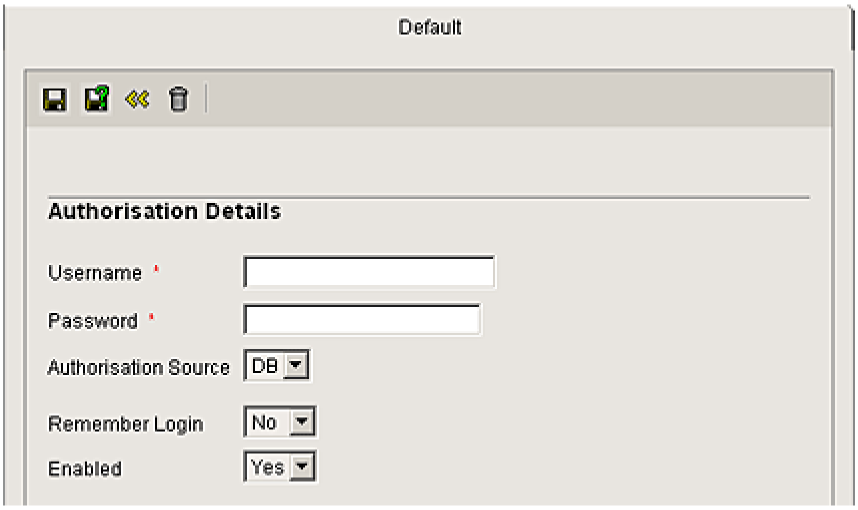
1. Click on the ***Users*** option within the left navigation



2. Click on the ***Everyone*** link

3. Click the ***Add a new user*** link.

Note*: The Default form will load with details that you can fill in for each user.*

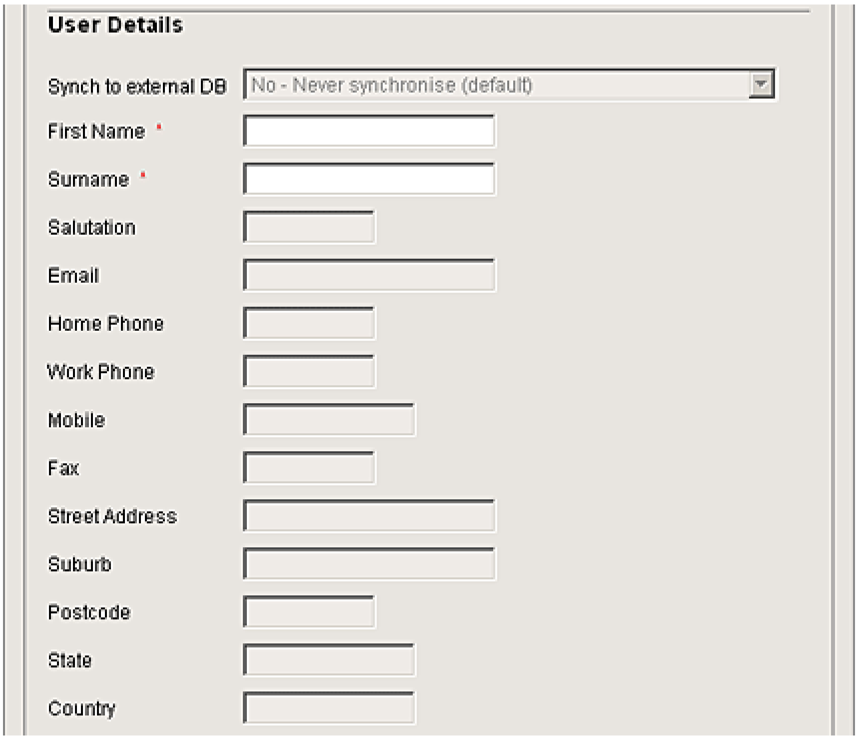


4. Add a desired ***Username*** and ***Password***.
   Common formats for usernames can include:
   - First name e.g. john
   - First name initial and surname - e.g. jsmith
   - First name and surname initial e.g. johns

5. Use the ***Authorisation Source*** drop-down menu to select how the user details will be stored and how they will be validated.

   Options include:
   - ***DB*** – Database. The user's name and information are stored in the *Verdi* database. **This is the default for most Verdi sites.**
   - ***AD*** – Active Directory. This is applicable if your network is using/ supporting Active Directory.
   - ***LDAP*** – Lightweight Directory Access Protocol. This is applicable if your network is using/ supporting LDAP technology.
   - ***NT*** – Windows NT. This is applicable if your network is using/ supporting Windows NT authentication

6. Ensure ***Enabled*** is set to '*Yes'*.
7. Enabling ***Remember Login*** will set a permanent cookie rather than a session cookie. Setting a permanent cookie will enable the PC to remember that you have been to the website before and maintain a login status. A session cookie expires after a certain amount of time, which means when you visit the website again, you will have to login.
8. Set ***Enabled*** to '*Yes*' to activate the user
9. Fill in the ***User Details***. The items marked with an asterisk (*) are mandatory fields that must be filled in.



10. ***Defaults*** section – The options in this section allow the administrator to set a ***Default Folder*** for the user when adding content, as well as setting a ***Default Homepage*** for the user.

11. Click the ***Save*** button to add the user.

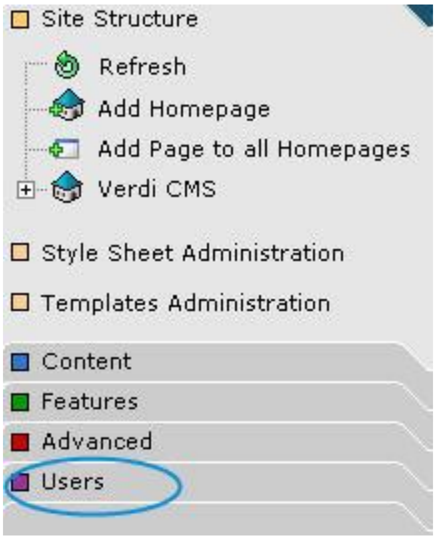
> ***Note**: Further tabbed options will be available after adding the user, allowing you to add permissions and assign the user to a user group.*

> ***Note**: Admin permissions will be required to enable the user to log into the* Verdi *system.*

> ***Note**: See section 7 for an overview of the administration roles and activities*

7.2 Adding a User Group

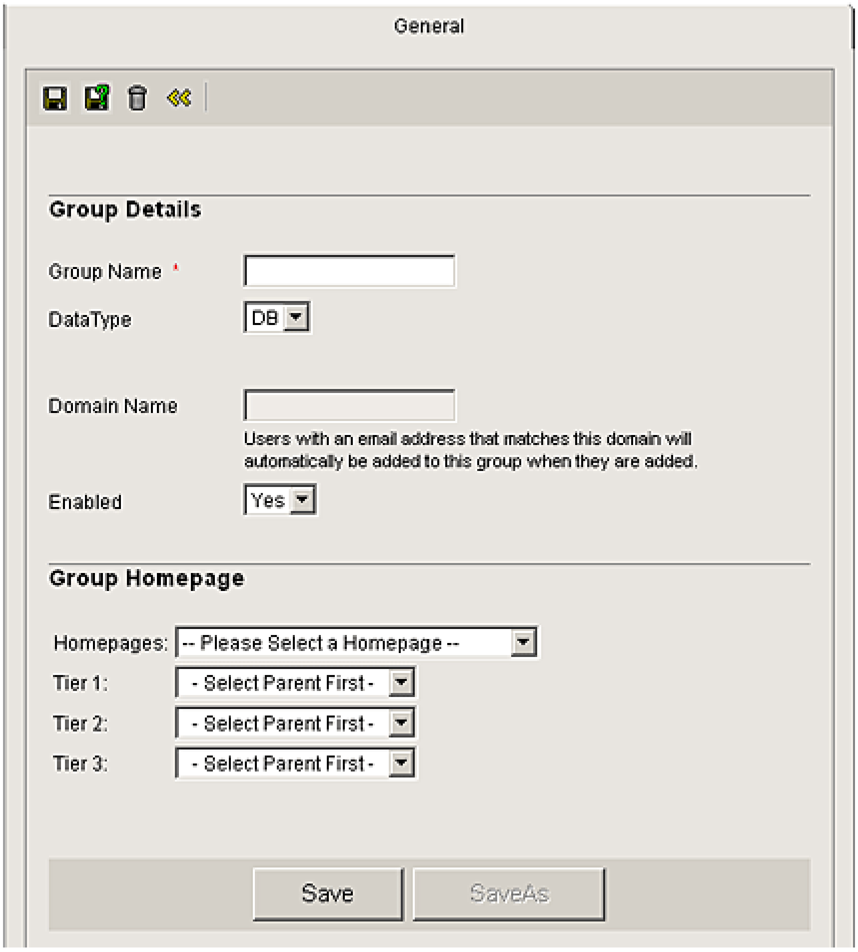
1. Click on the ***Users*** option within the left navigation



2. Click on the ***Everyone*** link within the ***Users*** menu

3. Click the ***Add a new group*** link.

Note*: The Add User Group form will load*



4. Enter a new ***Group Name*** for the user group

5. Use the ***Data Type*** drop-down menu to select how the user details will be stored and how they will be validated.

   Options include:
   - ***DB*** – Database. The user's name and information are stored in the *Verdi* database. **This is the default for most Verdi sites.**
   - ***AD*** – Active Directory. This is applicable if your network is using/ supporting Active Directory.
   - ***LDAP*** – Lightweight Directory Access Protocol. This is applicable if your network is using/ supporting LDAP technology.
   - ***NT*** – Windows NT. This is applicable if your network is using/ supporting Windows NT authentication

6. ***Domain Name*** (e.g. ibc.com.au). This is option is for public user access. When a user signs up for a restricted area of the if the email address matches that of the domain specified for the group they will automatically be added to the group and therefore inherit all the of the permissions that are assigned to that group.
7. Set ***Enabled*** to '*Yes*' to activate the user group.
8. If applicable, select a ***Group Homepage*** for the group.
9. Click the ***Save*** button to finish

7.3 Adding a User to a Group

Within the left hand menu tree structure, the following icons are used:

 Denotes a single user

 Denotes a group of users

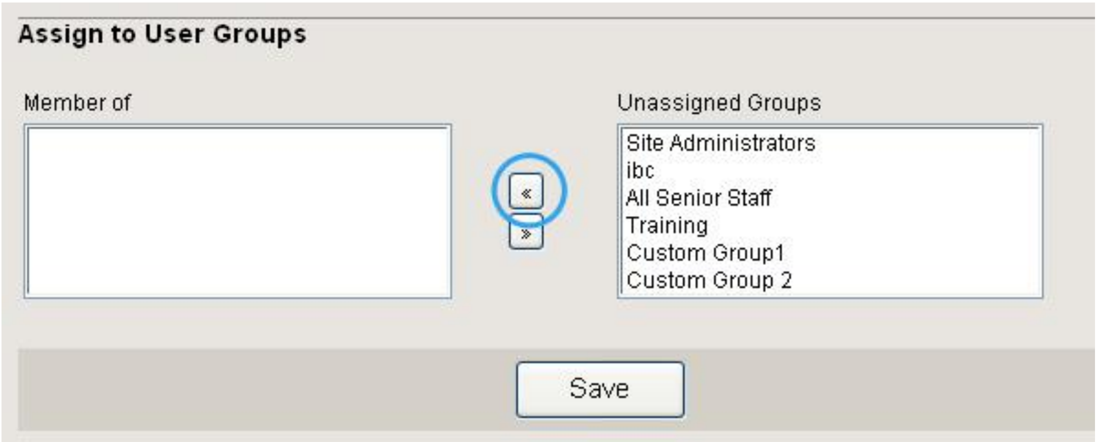
1. Click on the user that you want to add to a group.

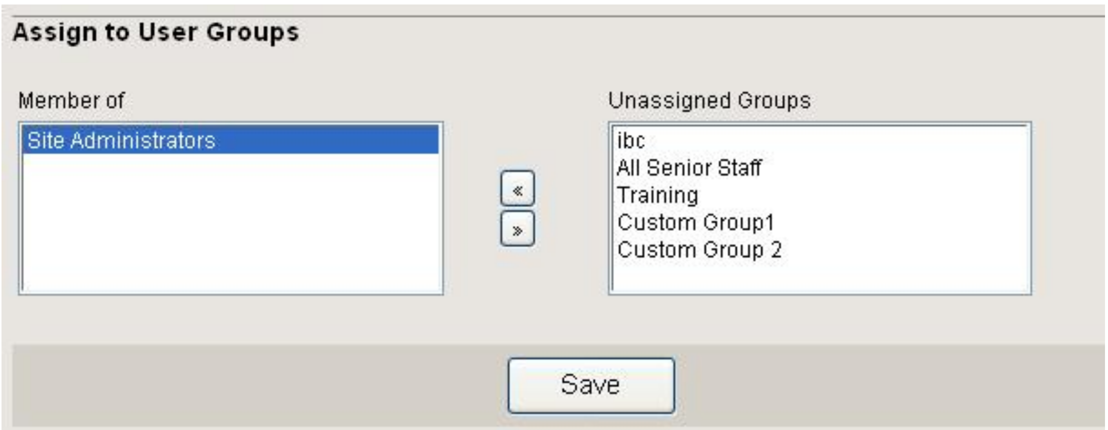
> ***Note**: The User details form will load*

2. Select the ***Group Memberships*** tab

> ***Note**: The Assign to User Groups form will load*

3. From the ***Unassigned Groups*** box select the group(s) that you want the user to belong to. (Hold down CRTL to select multiple groups.) Then click on the left arrow button to assign the groups.





4. Click the ***Save*** button to complete the group assignment

> ***Note**: Users can be assigned to multiple User Groups.*

7.4 Adding Multiple Users to a Group

1. Click on the ***Group*** name that the users need to be assigned to.

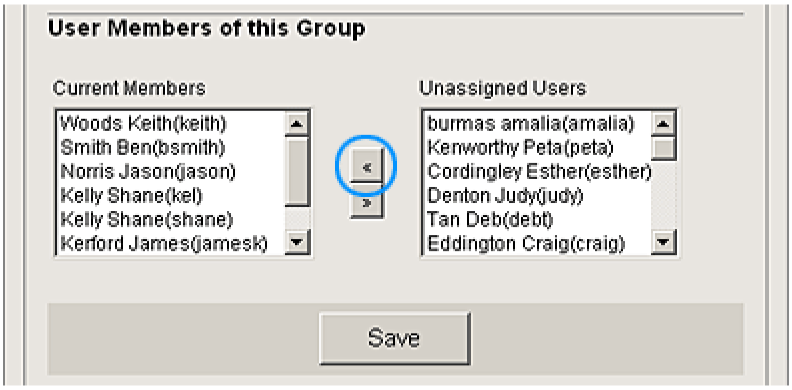
> ***Note****: The Group Details form will load*

2. Click on the ***User Members*** tab.

> ***Note****: The User Members of this Group form will load*

3. Select the users that you want to add from the ***Unassigned Users*** box and click on the ***Left Arrow*** button to move the users to the ***Current Members*** box.

> ***Note****: To select multiple Users hold the 'CTRL' key and left click to select the users you require.*



4. Click on the ***Save*** button to complete adding the users to the group.

7.5 Adding a User Permission

What are Permissions?
Permissions are settings that can be applied to pages and content to control who can view or edit the content.

There are two types of permissions:
1. **Public Permissions:** Define the permissions for public users viewing content on the public site.
2. **Administration Permissions:** Define the permissions for administration users for managing and editing content in the administration site.

Permissions can be control **allowing** content to be accessed or **denying** content to be accessed.

> ***Note****: This option is not applicable for Site Administrators since this role has unrestricted right access to all tiers in the site.*
>
> *In the event where a user has both user and group permissions, user permissions will take precedence over group permissions.*

1. Click on the ***Everyone*** link within the ***Users*** menu

2. ***Edit*** the required user by clicking on the username.

3. Click on the ***Permissions*** tab

4. Use the ***Add Permission*** drop-down menu to select a ***Permission Type*** for the user and click on the ***Go*** button

   There are two types of permissions:
   1. **Public Permissions:** Define the permissions for public users viewing content on the public site.
   2. **Administration Permissions:** Define the permissions for administration users for managing and editing content in the administration site.

7.5.1 Setting a User Administration Permission

Administration Permissions define the permissions for administration users for managing and editing content in the administration site.

1. From the ***Action*** options choose what you would like to **allow** or **deny** the user to do. Select ***Allow*** and from the ***Role*** drop-down choose one of the roles available (e.g. Site Administrator).

a. Select the Action type:
   i. **Allow:** This will allow the user to access content within the role or activities.
   ii. **Deny:** This will deny the user from accessing content within the role or activities.

b. Using the radio button select either a Role or Activity, and then select from the drop down field.

   ROLE
   Each role is delegated a set of activities, which act as permissions to what functions they can access within their Verdi administration area. See figure below:

   Role options include:
   - System Administrator
   - Site Administrator
   - Content Publisher
   - Structure Administrator
   - Content Administrator

   Alternatively, you can select from the Activity drop-down to choose an action for the user.

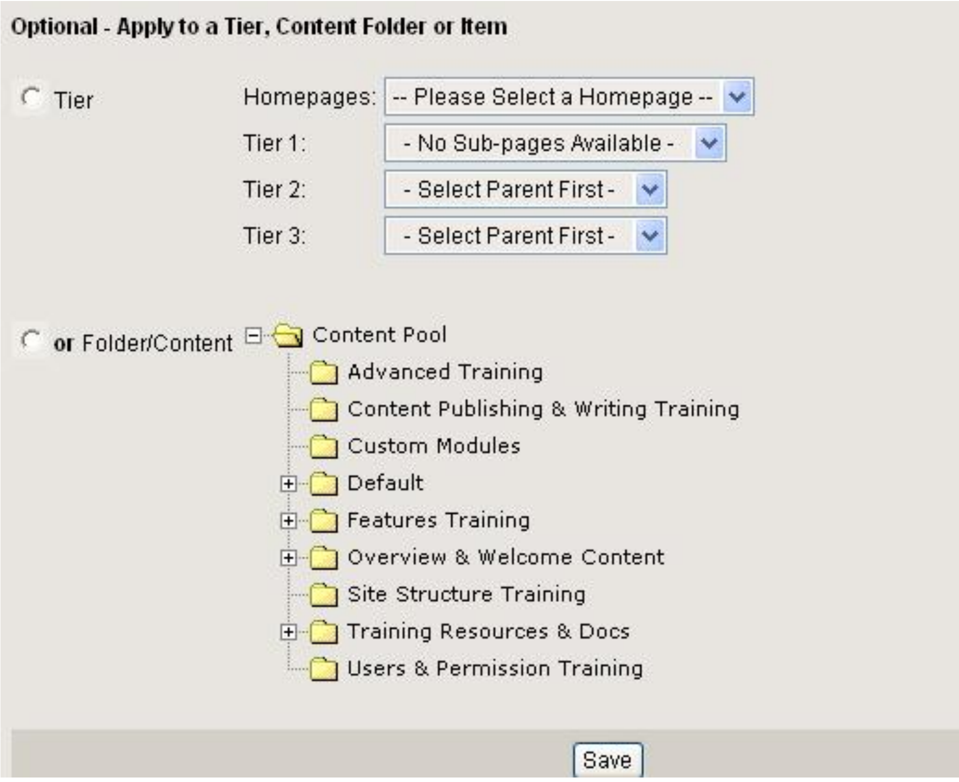
   ACTIVITY

   Activity options include:
   a. Configure and administer entire Verdi System
   b. Administrate the site (not advanced configuration)
   c. Add and modify content items and assign to structure
   d. Administrate Content Pool Folders
   e. Approve and publish content

f. Administrate Site Structure
g. View Public Site

> ***Note**: Depending upon the type of admin user, some settings may not be available.*
> *A number of administration permissions may be given to one user*

2. Use the ***Tier*** drop-down menus to select an area of the site to associate a permission. Alternatively, select the ***Folder/Content*** option to associate permission to an individual content pool folder.



3. Click the ***Save*** button to complete adding the permission.

7.5.2 Setting a User Public Permission

Public Permissions define the permissions for public users viewing content on the public site.

1. Use the ***Add Permission*** drop-down menu and select ***Public Permission*** for the user and click on the ***Go*** button.

2. From the ***Action*** options choose what you would like to **allow** or **deny** the user to do. Select ***Allow*** and from the ***Role*** drop-down choose one of the roles available (e.g. Site Administrator).

c. Select the Action type:
    iii. **Allow:** This will allow the user to access content within the role or activities.
    iv. **Deny:** This will deny the user from accessing content within the role or activities.

d. Using the radio button select either a Role or Activity, and then select from the drop down field.

ROLE
Each role is delegated a set of activities, which act as permissions to what functions they can access within their Verdi administration area. See figure below:

Role options include:
- System Administrator
- Site Administrator
- Content Publisher
- Structure Administrator
- Content Administrator

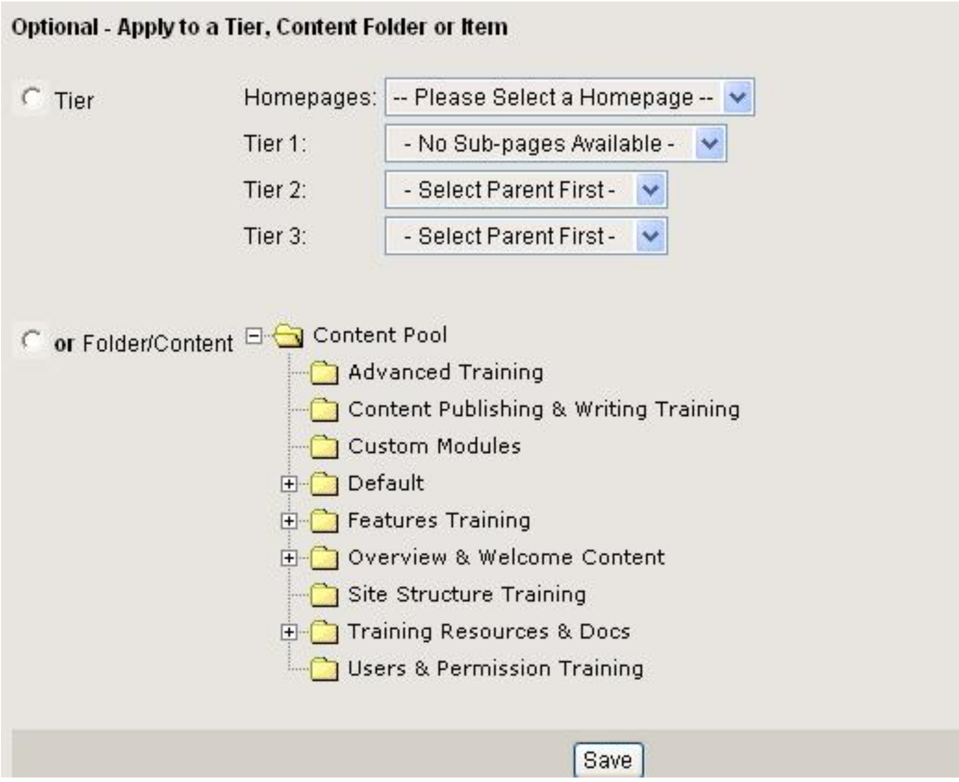
Alternatively, you can select from the Activity drop-down to choose an action for the user.

ACTIVITY

Activity options include:
- Configure and administer entire Verdi System
- Administrate the site (not advanced configuration)
- Add and modify content items and assign to structure
- Administrate Content Pool Folders
- Approve and publish content
- Administrate Site Structure
- View Public Site

> ***Note****: Depending upon the type of admin user, some settings may not be available.*
> *A number of administration permissions may be given to one user*

3. Use the ***Tier*** drop-down menus to select an area of the site to associate a permission. Alternatively, select the ***Folder/Content*** option to associate permission to an individual content pool folder.



4. Click the ***Save*** button to complete adding the permission.

7.6 Adding a Group Permission

Note**: In the event where a user has both user and group permissions, **user permissions will take precedence over group permissions.

1. ***Edit*** the required group by clicking on the group name.

2. Click on the ***Permissions*** tab.

3. Use the drop-down menu to select a ***Permission Type*** for the user and click on the ***Go*** button

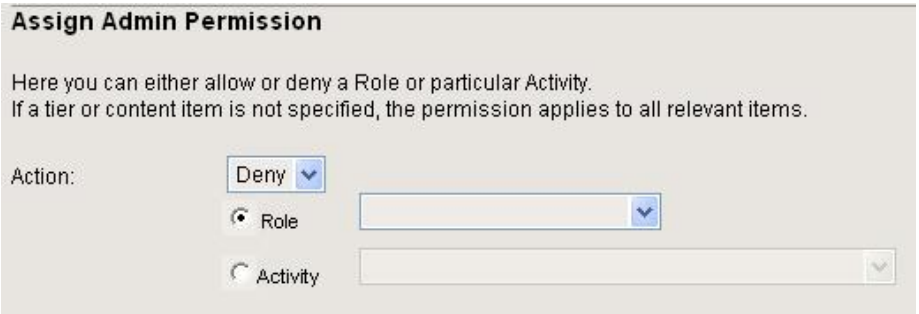
   There are two types of permissions:
   1. **Public Permissions:** Define the permissions for public users viewing content on the public site.
   2. **Administration Permissions:** Define the permissions for administration users for managing and editing content in the administration site.

***Note**: The Add User Group Permission form will load*

7.6.1 Setting a Group Admin Permission

Administration Permissions define the permissions for administration users for managing and editing content in the administration site.

1. From the ***Action*** options choose what you would like to **allow** or **deny** the user to do.
   Select ***Allow*** and from the ***Role*** drop-down choose one of the roles available (e.g. Site Administrator).



a. Select the Action type:
    v. **Allow:** This will allow the user to access content within the role or activities.
    vi. **Deny:** This will deny the user from accessing content within the role or activities.

b. Using the radio button select either a Role or Activity, and then select from the drop down field.

ROLE
Each role is delegated a set of activities, which act as permissions to what functions they can access within their Verdi administration area. See figure below:

Role options include:
- System Administrator
- Site Administrator
- Content Publisher
- Structure Administrator
- Content Administrator
- Advanced Workflow User

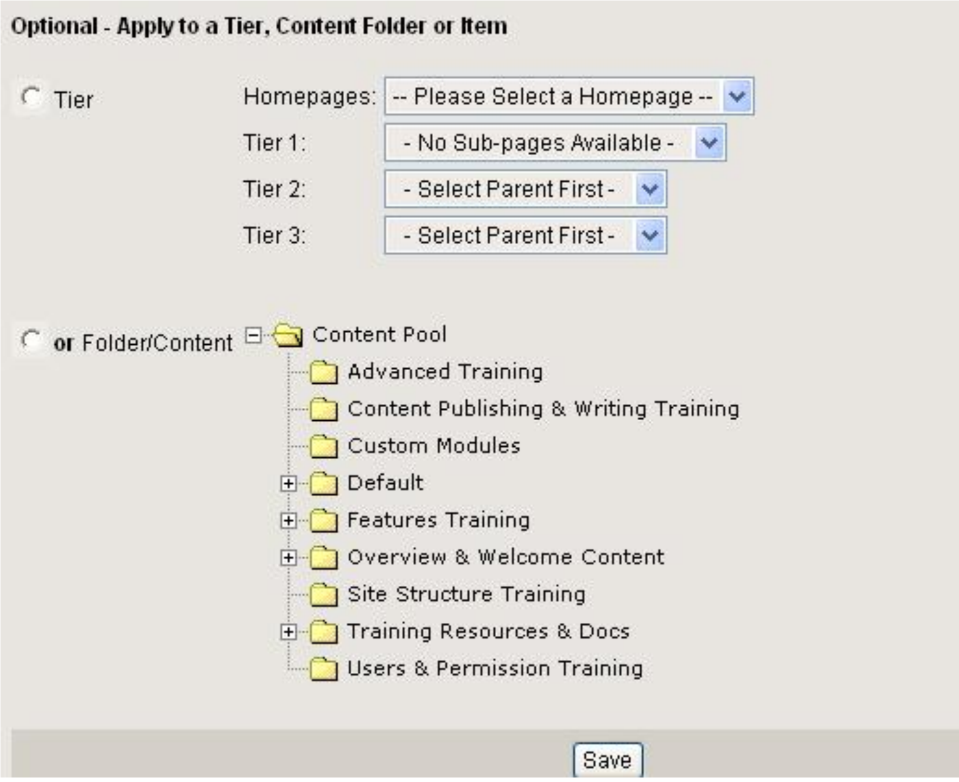
Alternatively, you can select from the Activity drop-down to choose an action for the user.

ACTIVITY

Activity options include:
- Administer the site (entire Verdi System, not configuration utlities)
- Mailing List Access
- Administer system settings
- Administrate the site (not advanced configuration)
- Add and modify content items and assign to structure
- Administrate Content Pool Folders
- Approve and publish content
- Administrate Site Structure
- View Public Site
- Advanced Workflow Access

> ***Note**: Depending upon the type of admin user, some settings may not be available.*
> *A number of administration permissions may be given to one user*

2. Use the ***Tier*** drop-down menus to select an area of the site to associate a permission. Alternatively, select the ***Folder/Content*** option to associate permission to an individual content pool folder.



3. Click the ***Save*** button to complete adding the permission.

7.6.2 Setting a Group Public Permission

Public Permissions define the permissions for public users viewing content on the public site.

1. Use the ***Add Permission*** drop-down menu and select ***Public Permission*** for the user and click on the ***Go*** button.

2. From the ***Action*** options choose what you would like to **allow** or **deny** the user to do.
Select ***Allow*** and from the ***Role*** drop-down choose one of the roles available (e.g. Site Administrator).

a. Select the Action type:
    vii. **Allow:** This will allow the user to access content within the role or activities.
    viii. **Deny:** This will deny the user from accessing content within the role or activities.

b. Using the radio button select either a Role or Activity, and then select from the drop down field.

ROLE
Each role is delegated a set of activities, which act as permissions to what functions they can access within their Verdi administration area. See figure below:

Role options include:
- System Administrator
- Site Administrator
- Content Publisher
- Structure Administrator
- Content Administrator
- Advanced Workflow User

Alternatively, you can select from the Activity drop-down to choose an action for the user.

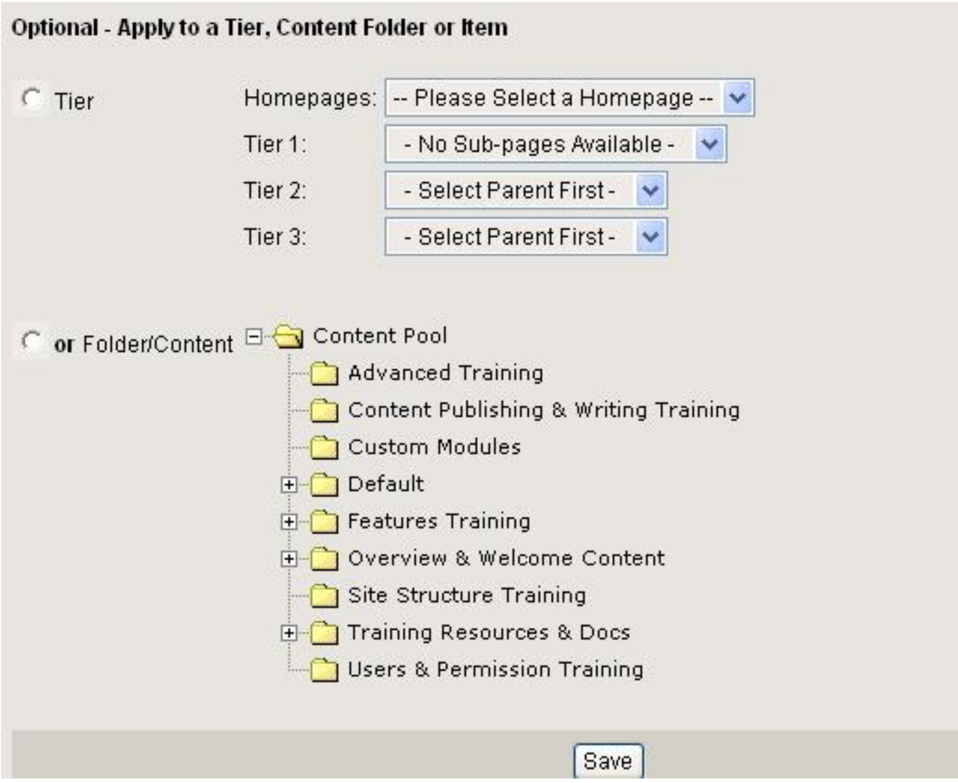
ACTIVITY

Activity options include:
- Configure and administer entire Verdi System
- Administrate the site (not advanced configuration)

- Add and modify content items and assign to structure
- Administrate Content Pool Folders
- Approve and publish content
- Administrate Site Structure
- View Public Site
- Mailing List Access
- Advanced Workflow Access

> ***Note**: Depending upon the type of admin user, some settings may not be available. A number of administration permissions may be given to one user*

3. Use the ***Tier*** drop-down menus to select an area of the site to associate a permission. Alternatively, select the ***Folder/Content*** option to associate permission to an individual content pool folder.

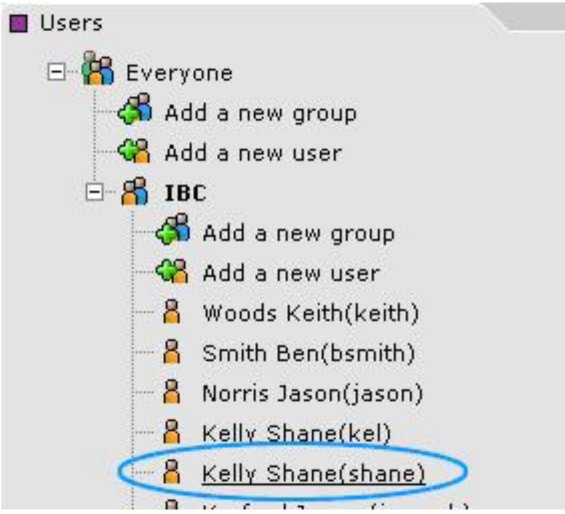


4. Click the ***Save*** button to complete adding the permission.

7.7 Editing a User

Denotes a single user

1. Click on the ***Username*** for the user you would like to administer.



***Note**: The Edit User form will load*

2. Make any required changes to the user record
3. Click on the ***Save*** button to finish.

7.8 Editing a User Group

Denotes a group of users

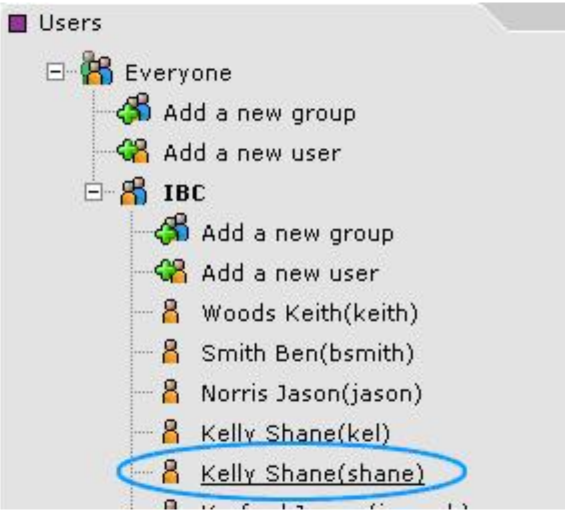
1. Click on the ***Group*** name for the user group you would like to administer

> ***Note****: The Edit Group form will load*

2. Make any required changes to the User Group
3. Click on the ***Save*** button to finish

7.9 Editing a User Permission

1. Click on the ***Username*** for the user you would like to administer



***Note**: The Edit User form will load*

2. Click on the ***Permissions*** tab

3. Click on the ***Edit*** option for the appropriate permission

***Note**: The Edit User Permission form will load*

4. Make any required changes
5. Click on the ***Save*** button to finish

7.10 Editing a Group Permission

1. Click on the ***Group*** name for the user group you would like to administer

2. Click on the ***Permissions*** tab

> ***Note****: The Permissions tab will load*

3. Click on the ***Edit*** option for the permission you would like to change

> ***Note****: The Edit User Group Permission form will load*

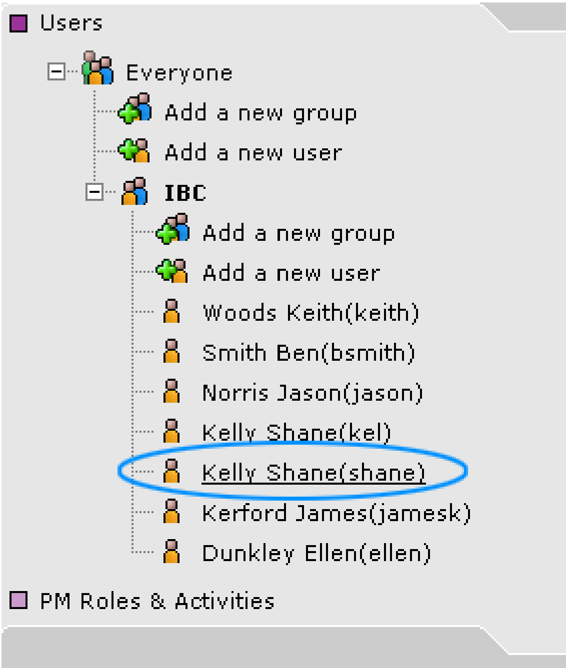
4. Make any required changes
5. Click on the ***Save*** button to finish

7.11 Deleting a User

There are two ways you can delete a user.

Method 1:

1. Click on the ***Username*** for the user you would like to delete



> ***Note****: The Edit User form will load*

2. Click on the ***Delete*** button to delete the user from the administration.

Method 2:

1. Click on the ***Everyone*** link within the ***Users*** menu

2. Click on the ***Delete*** link next to the user you require to delete.

User ID	First Name	Last Name	Action
keith	Keith	Woods	Delete
bsmith	Ben	Smith	Delete
jason	Jason	Norris	Delete
DBUserID	FirstName1	LastName1	Delete
a	TestName	tester	Delete
kel	Shane	Kelly	Delete
ellen	Ellen	Dunkley	Delete
jamesk	James	Kerford	Delete
admin	Site	Administrator	Delete
editor	Content	Editor	Delete
leah	Leah	Dent	Delete
training	training	group	Delete
custom2	custom2	testgroup	Delete
leah_systemadmin	Leah_SystemAdmin	Dent	Delete
leah_writer	leahwriter	leahwriter	Delete
leah_publisher	leahpublish	publisher	Delete
leah_structure	leah_structure	structure	Delete
Test	John	Smith	Delete

7.12 Deleting a User Group

1. Click on the ***Group*** name for the user group you would like to delete

Note: *The Group Details form will load*

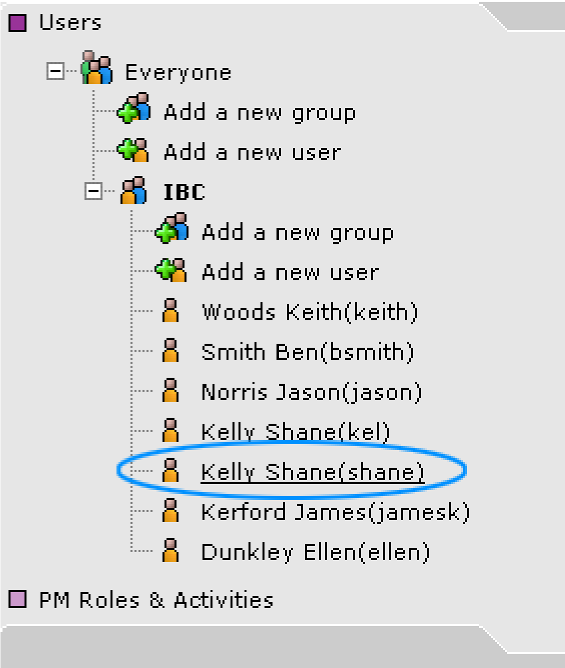
2. Click on the ***Delete*** button to remove the Group from the user administration.

Note: *Any assigned users will no longer be assigned to a group.*

Any permissions that were assigned to the deleted group will also be removed and users that relied upon these will require individual permissions to be added.

7.13 Removing a User from a Group

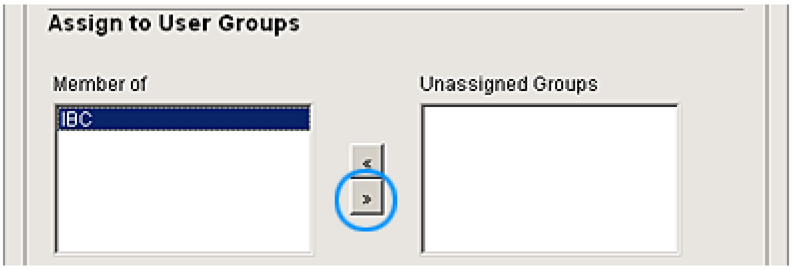
1. Click on the ***Username*** for the appropriate user



2. Click on the ***Group Memberships*** tab.

> ***Note**: The Assign to User Groups form will load.*

3. Select the *Group* from the ***Member of*** box that you want to remove the user from and click the ***Right Arrow*** button to move the group name to the ***Unassigned Groups*** box.



4. Click the ***Save*** button to complete removing the group membership.

7.14 Removing Multiple Users from a Group

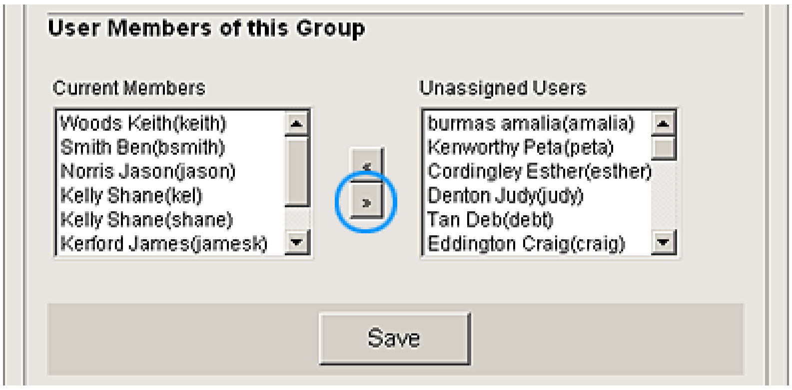
1. Click on the ***Group*** name that the users belong to.

***Note**: The Group Details form will load*

2. Click on the ***User Members*** tab.

***Note**: The User Members of this Group form will load*

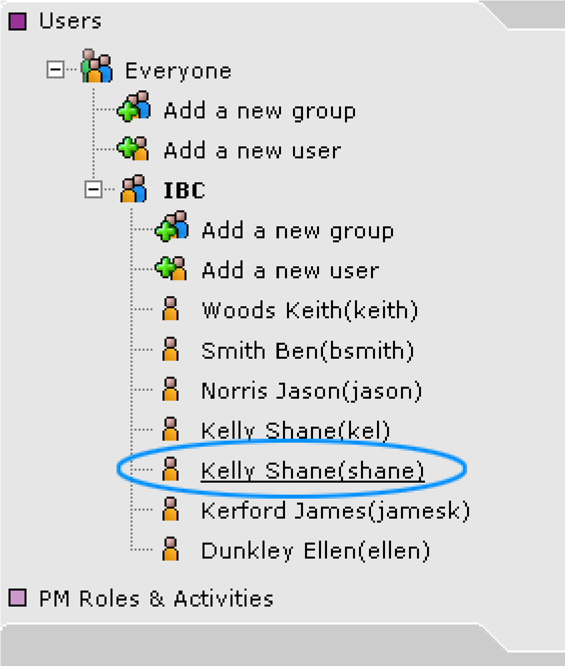
3. Select the users that you want to remove from the ***Current Members*** box and click on the ***Right Arrow*** button to move the users to the ***Unassigned Users*** box.



4. Click on the Save button to complete removing multiple users.

7.15 Deleting a User Permission

1. Click on the ***Username*** for the user you would like to delete permissions from:



Note*: The User Details form will load*

2. Click on the ***Permissions*** tab

Note*: The User Permissions form will load*

3. Click on the ***Delete*** option for the permission you would like to remove

4. Click on the ***OK*** button to confirm deletion or click on the ***Cancel*** button to stop the deletion

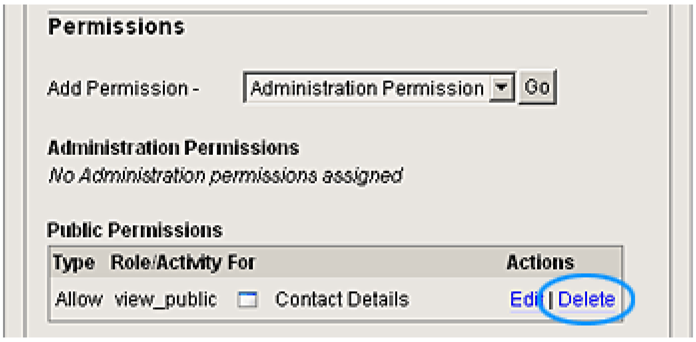
7.16 Deleting a Group Permission

1. Click on the ***Group*** name for the user group you would like to remove permissions from

2. Click on the ***Permissions*** tab

Note*: The Permissions tab will load*

3. Click on the ***Delete*** option for the permission you would like to remove



4. Click on the ***OK*** button to confirm deletion or click on the ***Cancel*** button to stop the deletion

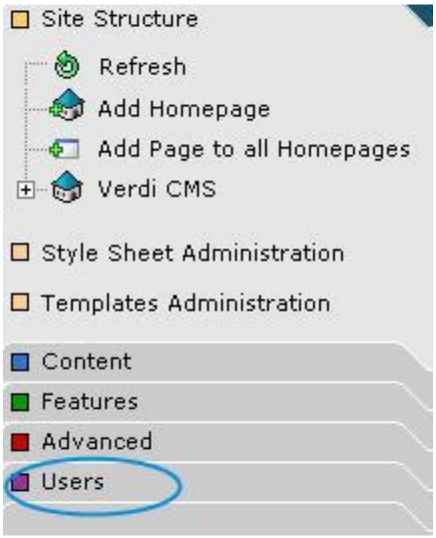
8 Verdi Roles and Activities

The Verdi Roles and Activities Administration enable you to administer the roles and activities that can be assigned to users of the Verdi system.

(See the **Administration Users & Workflow** section for a table of Verdi default roles and activities.)

8.1 Viewing Verdi Activities

1. Click on the ***Users*** option within the left navigation

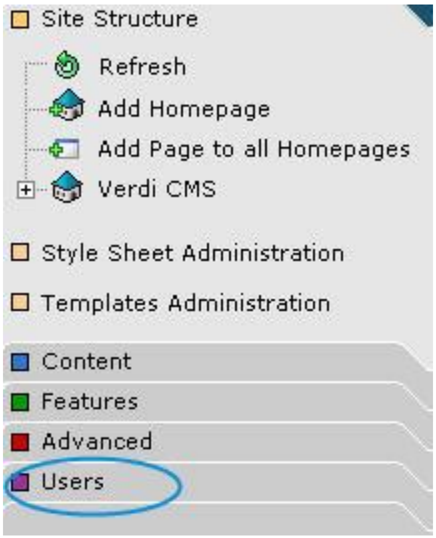


2. Click on the ***Verdi Role & Activities*** option within the ***Users*** menu

> ***Note**: The Roles and Activities form will load with the Verdi Activity tab currently active*

8.2 Viewing Verdi Roles

1. Click on the ***Users*** option within the left navigation.



2. Click on the ***Verdi Roles & Activities*** option within the ***Users*** menu.

> ***Note***: *The Roles and Activities form will load with the Verdi Activity tab currently active*

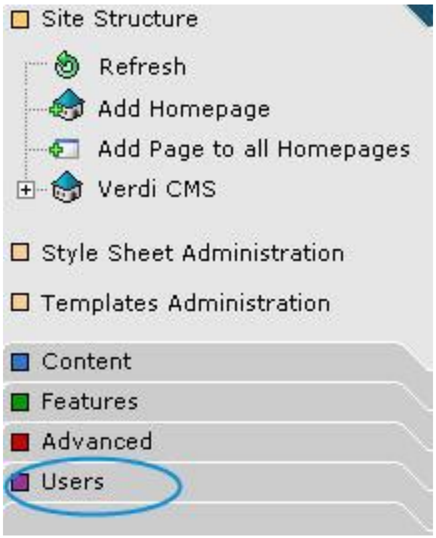
3. Click on the ***Verdi Role*** tab to view the roles available in Verdi.

> ***Note***: *The Verdi Role tab will load with a list of current roles available within Verdi*

(See the **Administration Users & Workflow** section for a table of Verdi default roles and activities.)

8.3 Viewing Activity/Role Assignment

1. Click on the ***Users*** option within the left navigation.



2. Click on the ***Verdi Role & Activities*** option within the left navigation.

> ***Note****: The Roles and Activities form will load with the Verdi Activity tab currently active*

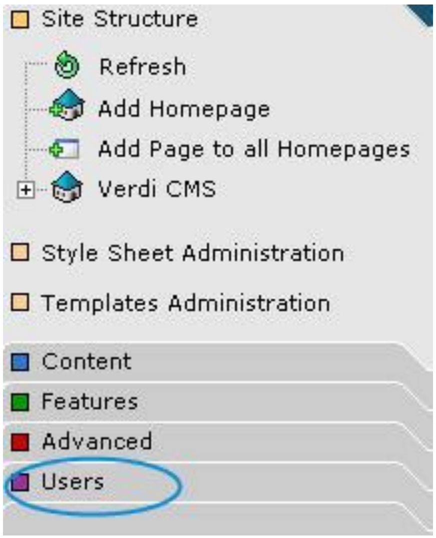
3. Click on the ***Activity/Role Assignment*** tab.

> ***Note****: The Assign activities to roles form will load.*

4. To view activities that are assigned to roles select the ***Role*** from the drop-down and the ***Assigned*** and ***Unassigned*** boxes will automatically update with the assigned activities.

8.4 Modifying Verdi Roles

1. Click on the ***Users*** option within the left navigation.



2. Click on the ***Verdi Role & Activities*** option within the ***Users*** menu.

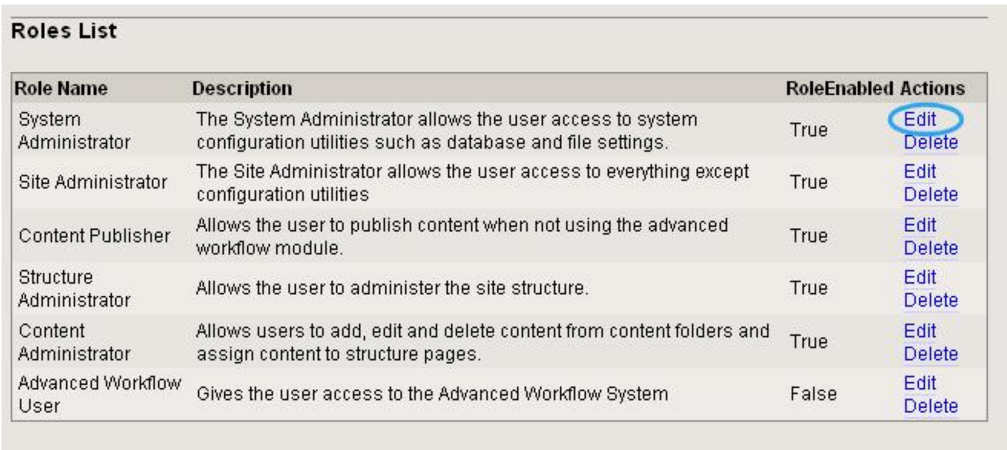
> ***Note****: The Roles and Activities form will load with the Verdi Activity tab currently active*

3. Click on the ***Verdi Role*** tab to view the roles available in Verdi.

> ***Note****: The Verdi Role tab will load with a list of current roles available within Verdi*

4. The screen will display a list of current roles available.

   - To **Edit** a role- select the ***Edit link***
   - To **Delete** a role, select the ***Delete link***

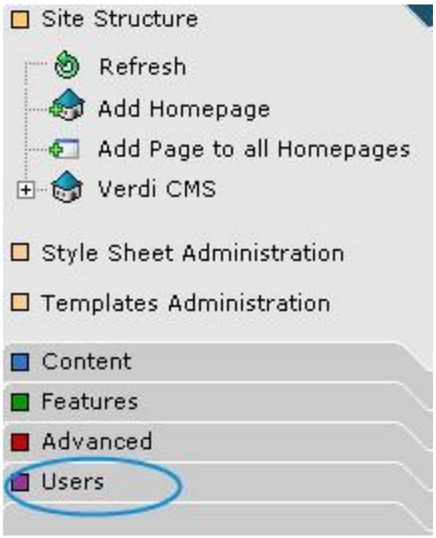


Roles List

Role Name	Description	RoleEnabled	Actions
System Administrator	The System Administrator allows the user access to system configuration utilities such as database and file settings.	True	Edit Delete
Site Administrator	The Site Administrator allows the user access to everything except configuration utilities	True	Edit Delete
Content Publisher	Allows the user to publish content when not using the advanced workflow module.	True	Edit Delete
Structure Administrator	Allows the user to administer the site structure.	True	Edit Delete
Content Administrator	Allows users to add, edit and delete content from content folders and assign content to structure pages.	True	Edit Delete
Advanced Workflow User	Gives the user access to the Advanced Workflow System	False	Edit Delete

8.5 Modifying Activity/Role Assignment

1. Click on the ***Users*** option within the left navigation.



2. Click on the ***Verdi Role & Activities*** option within the left navigation.

> ***Note****: The Roles and Activities form will load with the Verdi Activity tab currently active*

3. Click on the ***Activity/Role Assignment*** tab.

> ***Note****: The Assign activities to roles form will load.*

4. To view activities that are assigned to roles select the ***Role*** from the drop-down and the ***Assigned*** and ***Unassigned*** boxes will automatically update with the assigned activities.

9 Administering Content Formats

The Content Formats section controls the types of content that can be included in the site. Verdi comes with a number of pre-formatted Content Formats, which are based on your site specifications.

What are Content Formats?

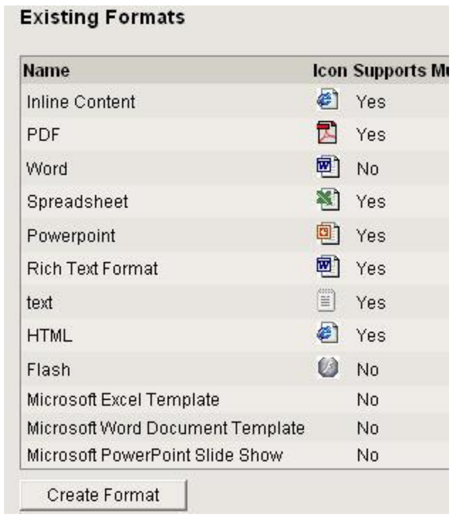
Common formats include Word, Excel, HTML, Images (GIF and JPEG), PDF and Flash.

9.1 Adding a New Content Format

1. Click on ***Content Formats*** link from within the ***Advanced*** section

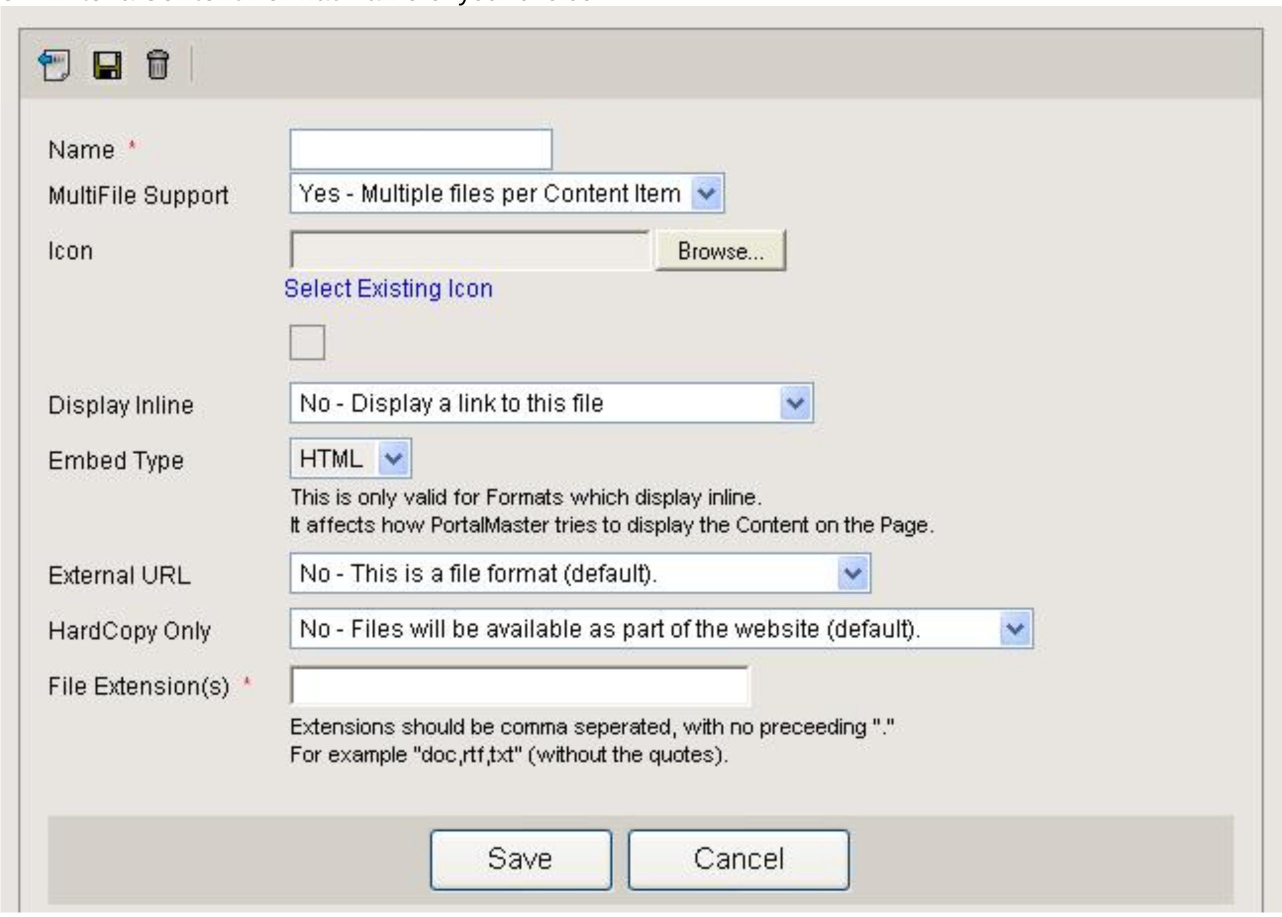
> ***Note:*** *The Content Formats Administration should load*

2. Click on the ***Add a Content Format*** link or the ***Create Format*** button at the bottom of screen.



> ***Note:*** *The Add a Content Format form should load*

3. Enter a ***Content Format Name*** of your choice.



4. ***MultiFile Support*** - Allows multiple files of the same type to be uploaded at one time when adding content to a Content Pool Item.
5. ***Icon*** - Click on the ***Select Existing Icon*** link to choose an existing icon or use the ***Browse*** button to choose an icon from your local or network drive. This icon is displayed together with the content pool item title on the public site
6. ***Display Inline*** - Allows the file type to be embedded into HTML.
7. ***Embed Type*** - Select the appropriate Inline Embed type.

> ***Note:*** *Only applicable if you have enabled Support for Inline Content*

Currently Verdi supports the following content formats, which can be embedded into HTML:

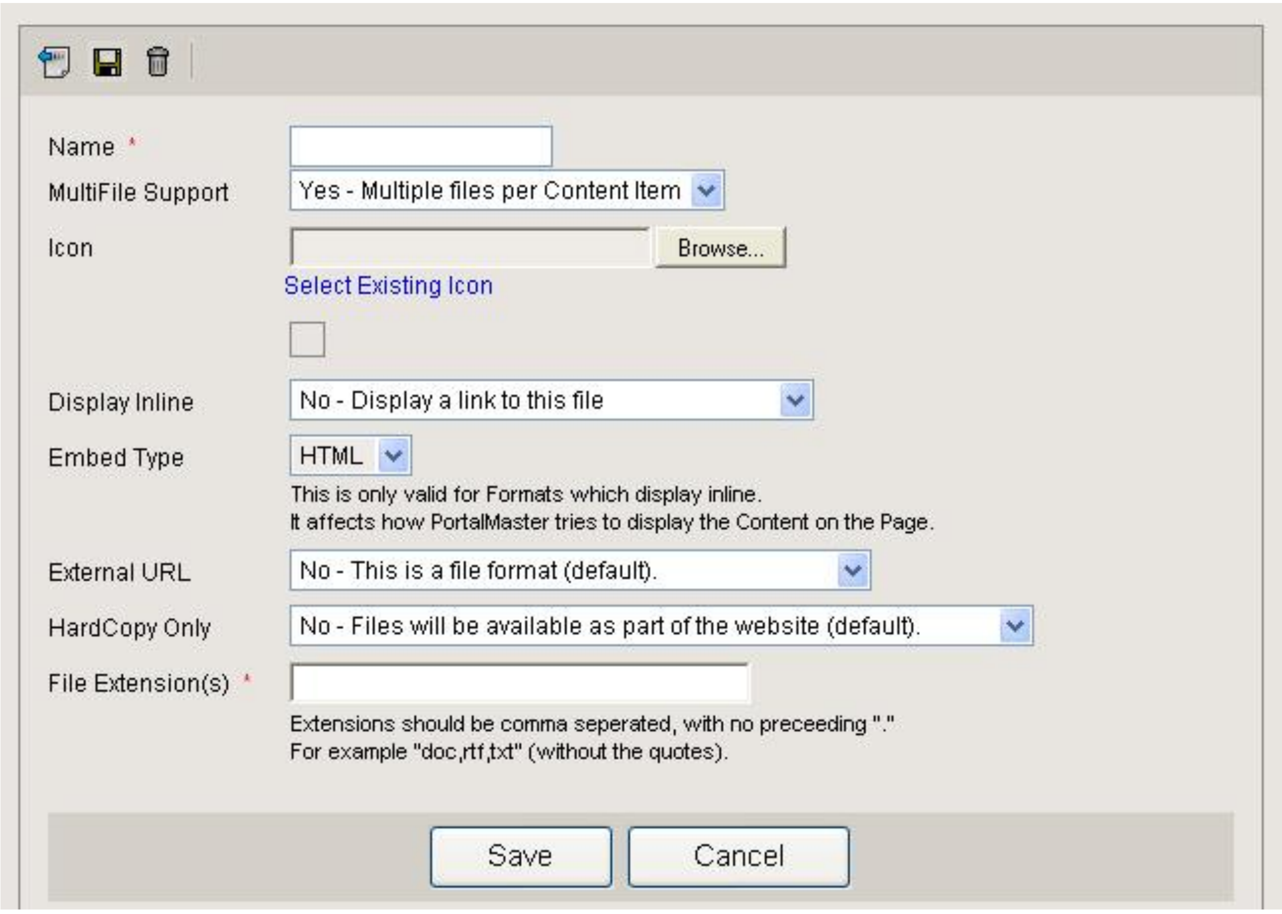
- Images (gif and jpeg)
- Flash
- Ipix
- Quicktime

8. ***External URL*** - Switches on the ability for users to add an external URL redirect to a content pool item.
9. ***Hard Copy Only*** - Switches the ability for the content to be available on the website or whether it is only available offline.
10. ***File Extensions*** - Enter the allowed file extension(s) for the content. Example: ‘xls’ for an MS Excel file and ‘doc’ for a MS Word file.
11. Click on the ***Save*** button to finish.

9.2 Editing a Content Format

1. Click on the ***Edit*** option for the appropriate format.

Note: *The Edit a Content Format form should load*



2. Make any required changes
3. Click on the ***Save*** button to finish

9.3 Deleting a Content Format

1. Click on the ***Delete*** option for the appropriate format

Existing Formats

Name	Icon	Supports Multiple Files	Actions
Inline Content		Yes	Edit | Delete
PDF		Yes	Edit | Delete
Word		No	Edit | Delete
Spreadsheet		Yes	Edit | Delete
Powerpoint		Yes	Edit | Delete
Rich Text Format		Yes	Edit | Delete
text		Yes	Edit | Delete
HTML		Yes	Edit | Delete
Flash		No	Edit | Delete
Microsoft Excel Template		No	Edit | Delete
Microsoft Word Document Template		No	Edit | Delete
Microsoft PowerPoint Slide Show		No	Edit | Delete

Create Format

2. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion.

10 Administering Content Categories

Content categories help to manage content formats with Verdi. They also help public users when searching for content items on the public site.

Why use content categories?

Content Categories are used to define the different types of content that can be added to your site. You can restrict the list of Formats for Content that is allowed per Category, for example you can create a Category called "Documents" that only allows the Formats "Word Document" and "PDF".

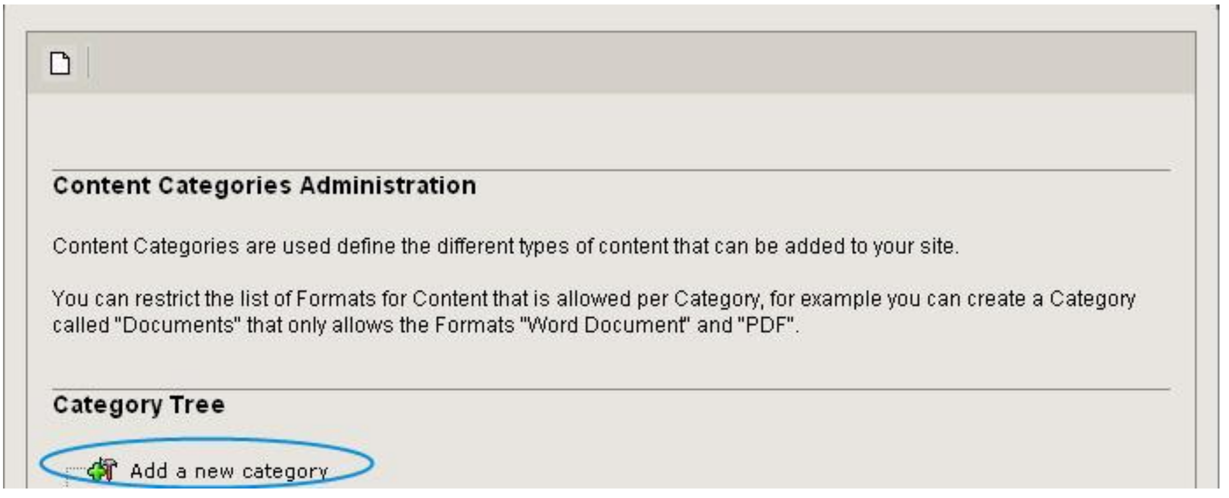
10.1 Adding a New Content Category

To add a new content category:

1. Click on the ***Content Categories*** link, from within the ***Advanced*** section

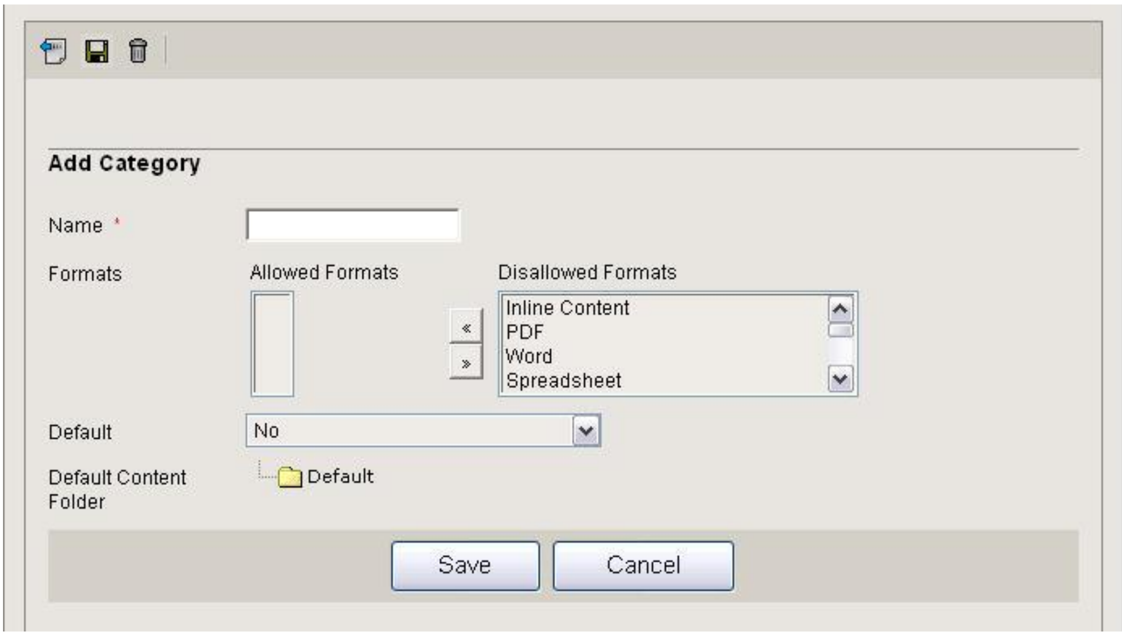
Note: *The Content Categories Administration should load*

2. Click on the ***Add a new Category*** link



Note: *The Content Category form should load*

3. Enter a ***Content Category Name*** of your choice



4. Click on the ***Save*** button to finish

10.2 Adding a Content Sub-Category

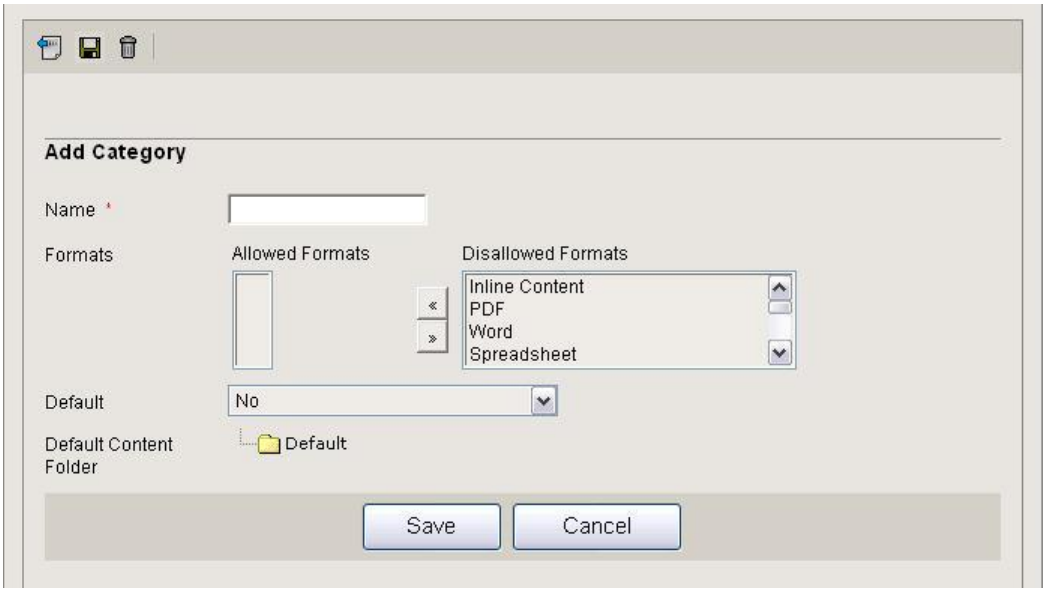
What is a Content Sub- Category?

A content Sub-category is a category that can be added within a main content category. For Example: You may have a main category for "Documents" and then may want to break down further into types of documents like "Accounting Documents" (.xls formats).

1. Click the plus (+) next to the ***Category*** that you want to add a sub category to.

2. Click on the ***Add a new Category*** link.

Note: *The Add Category form should load*



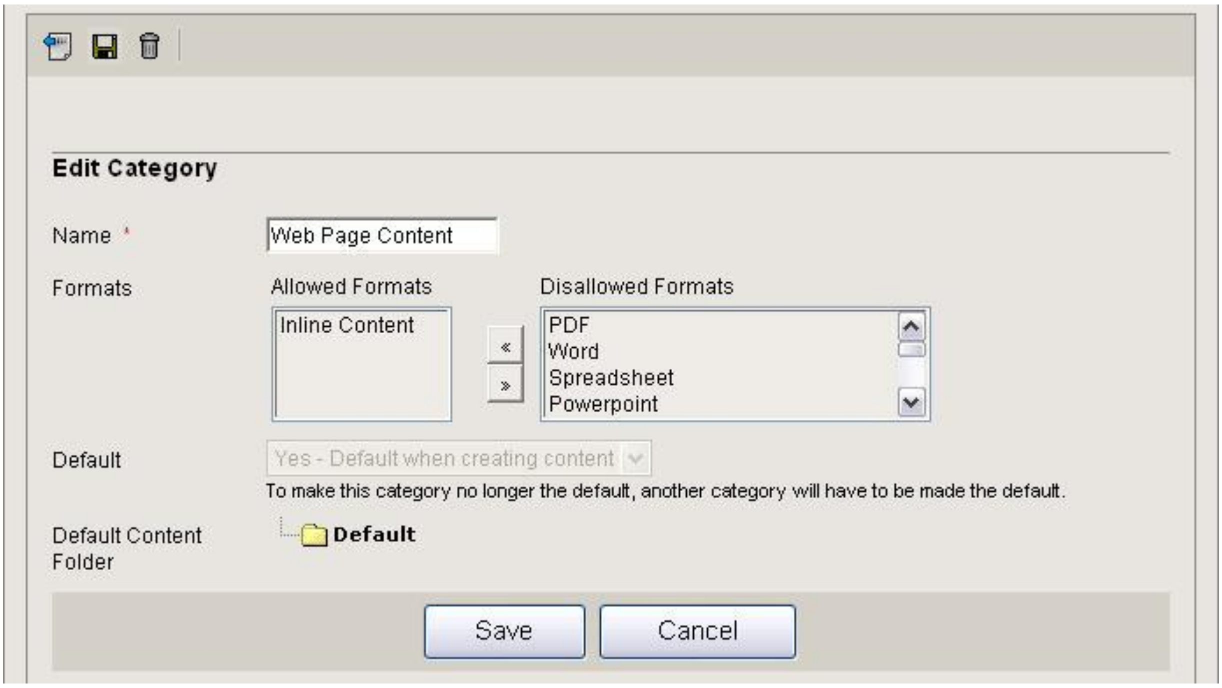
3. Enter a name for your ***Sub Category*** of your choice.
4. Click on the ***Save*** button to finish

10.3 Editing a Content Category or Sub-category

1. Click on the category you want to edit

Note: *The Category form should load*

2. Make the necessary changes.



3. Click on the ***Save*** button to finish

Note: *The new category should now be listed on the Content Categories Administration page*

10.4 Deleting a Single Content Category or Sub-category

1. Click on the category or sub-category that you want to delete

2. Click on the ***Delete*** button

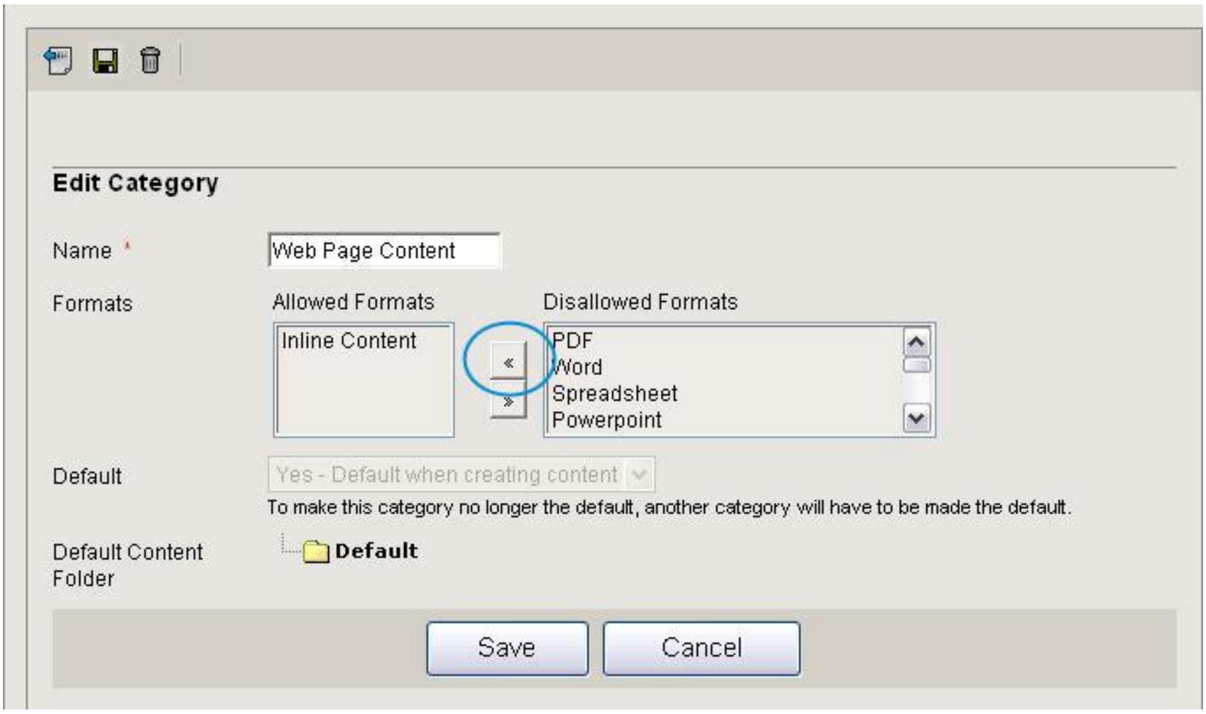
3. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion

10.5 Adding an Allowed Content File Format

1. Click on the ***Edit*** option for the appropriate Category.

> ***Note:*** *The Edit Content Category form should load, displaying the category details*

2. Select the file format(s) that you want to allow and click on the *left arrows* to add to the ***Allowed Formats*** box.

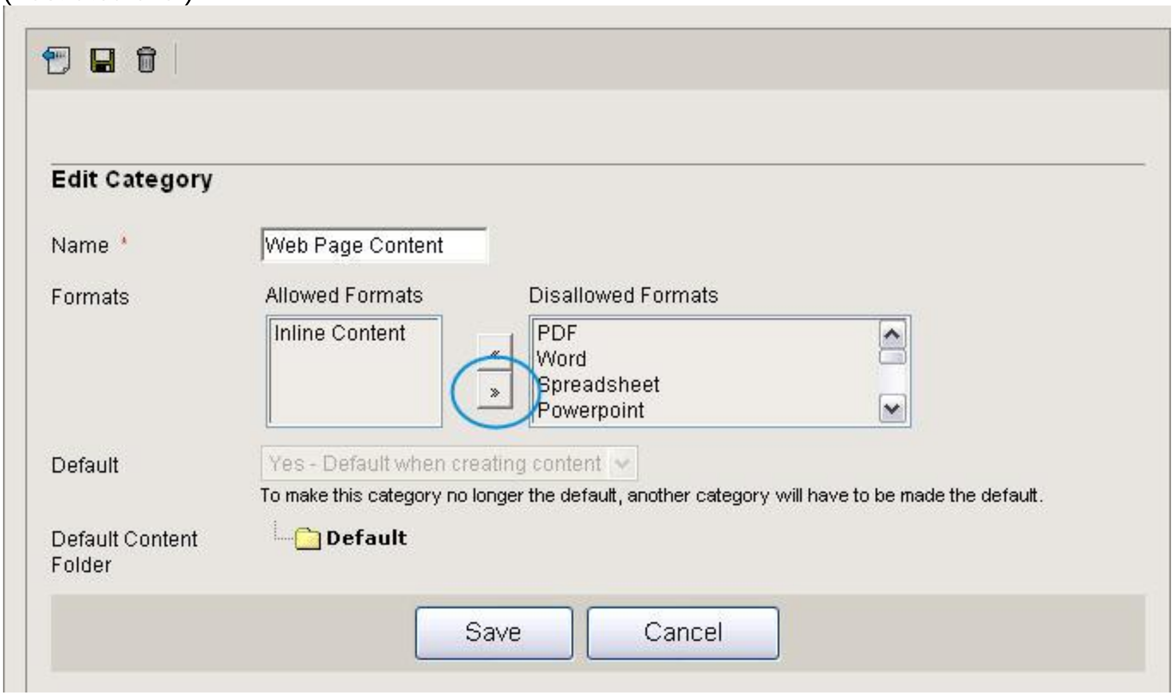


> ***Note:*** *The selected formats will be added to the Allowed Formats box.*

3. Once you have made your selections click the ***Save*** button to finish

10.6 Deleting an Allowed Content File Format

1. ***Edit*** the required Content Category
2. Select the file format that you want to remove and click on the *right arrows* to remove the file format. (illustrated over).



3. Click on the ***Save*** button to finish or click on ***Cancel*** to cancel your actions.

11 Administering the Meta Keywords Dictionary

What is the Meta-Keywords Dictionary?

The Meta- Keywords Dictionary helps to administer the metadata of your Verdi content and pages. Metadata provides a description of the content and pages, including titles, authors, dates and keywords that relate to the contents topic. The Meta Keywords dictionary is used to administer search engine keywords within the Verdi system. The dictionary stores pre-defined keywords, which can be selected by users when creating content pool items or tiers. You can add, edit and delete words within the dictionary.

The keywords that are applied to content items and tiers are stored within the sites searching function, to assist with efficient searching.

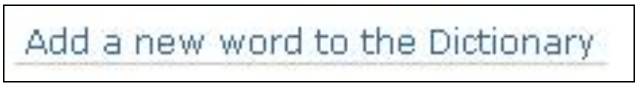
The Verdi Meta-Keywords Dictionary organises keywords into ***Keyword Categories*** and ***Sub-Categories***. Each keyword must belong to a Category.

11.1 Adding Words to the Dictionary

1. Click on the ***Meta Keywords Dictionary*** link from within the ***Advanced*** section.

Note: *The Meta Keywords Dictionary administration should load*

2. Click on the Add a New word to the Dictionary link.



Note: *The Meta Keywords form should load*

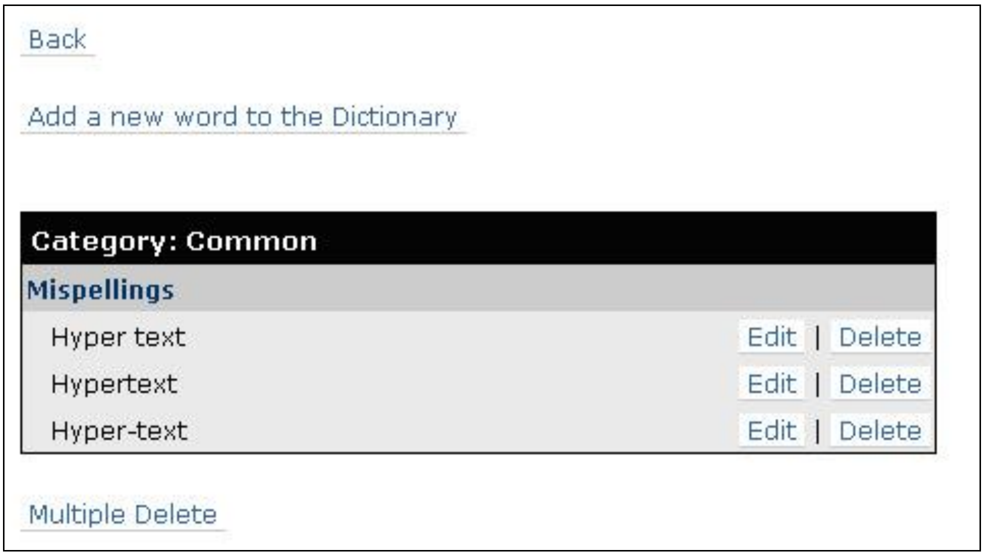
3. Enter your new keyword

4. Enter a ***Category*** for the keyword
5. Enter a ***Subcategory*** for the keyword (if applicable).
6. Click on ***Insert*** to finish

11.2 Editing Keywords in the Dictionary

1. Click ***View*** on the category that the word belongs to.

2. Click on the ***Edit*** option for the appropriate keyword

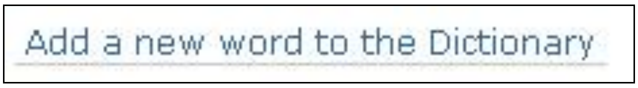


3. Make the necessary changes

4. Click on the ***Update*** button to finish

11.3 Adding Keyword Categories to the Dictionary

1. Click on the Add a New word to the Dictionary link.



Note: *The Meta Keywords form should load*

2. Enter your new keyword

3. Enter a new ***Category*** for the keyword by typing it into the field.
4. Enter a ***Subcategory*** for the keyword (if applicable).
5. Click on ***Insert*** to finish. Your new category will now be available from the dropdown menu when you insert new keywords, copy keywords or edit existing keywords.

11.4 Making a Copy of a Meta Keyword

This allows you to make a copy of a keyword by putting it into another category and subcategory by selecting Save As.

1. Click on the ***Edit*** option for the keyword you wish to copy
2. Make any required changes

3. Click on the ***Save As*** button to finish

> ***Note:*** *The new keyword should now be listed on the Meta Keywords Administration page*

11.5 Deleting Single Meta Keywords from the Dictionary

1. View the category your keyword resides under and click on the ***Delete*** option for the appropriate keyword.

2. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion

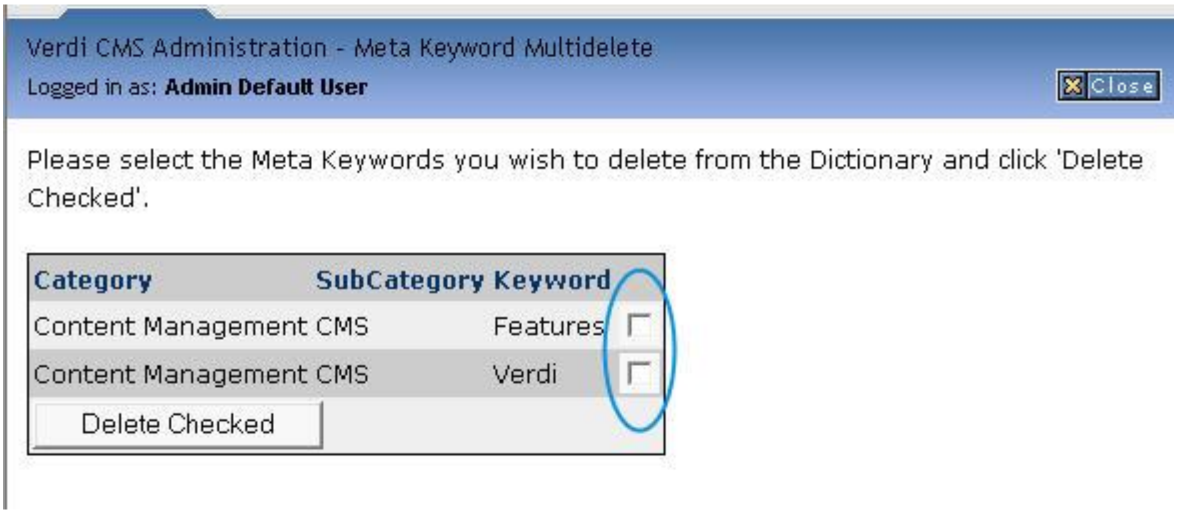
3. Click on the ***OK*** button to remove all instances of the word that you have chosen to remove or click ***Cancel*** to leave the instances.

11.6 Deleting Multiple Meta Keywords from the Dictionary

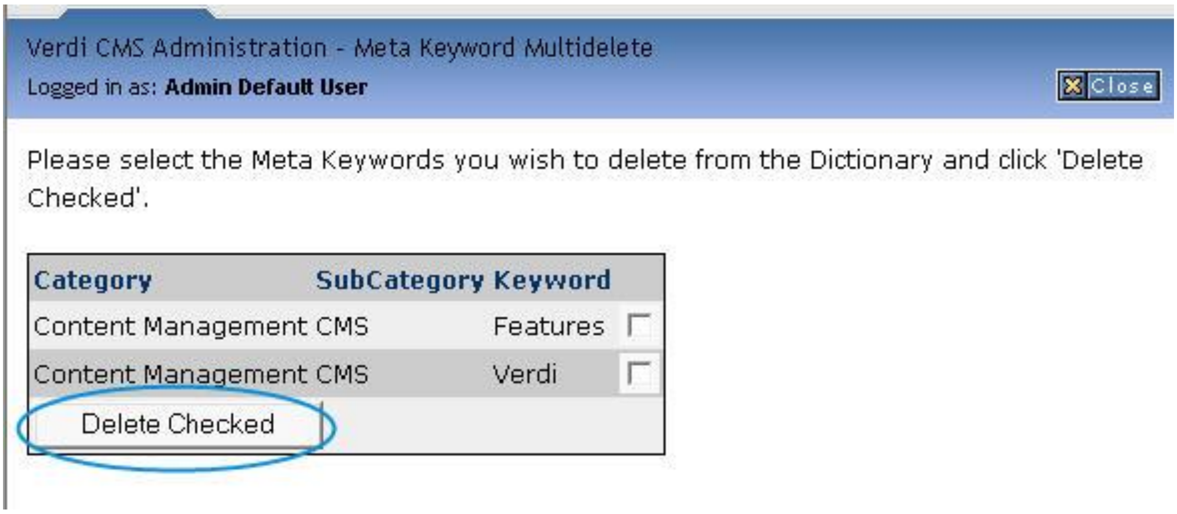
1. Click on the ***Multiple Delete*** option (link at the bottom of screen after the full listing of keywords)

> ***Note:*** *A new popup window should load, listing all meta keywords*

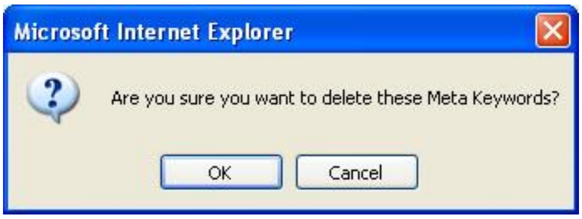
2. Select the keywords you wish to remove by selecting the checkboxes



3. Click on the ***Delete Checked*** button



4. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion



12 Style Sheet Administration

What is a Style Sheet?

Style sheets control the look and feel of the pages within Verdi, such as font styles, layouts, heading styles, alignments and general navigation menu styles. Verdi comes with a number of pre-defined style sheets, which have been created outside of Verdi by technical programmers during the graphical design stage of your website.

The administration and management of your style sheets requires technical expertise and knowledge. Modifications and importing of new style sheets should only be managed by high level Site Administrators.

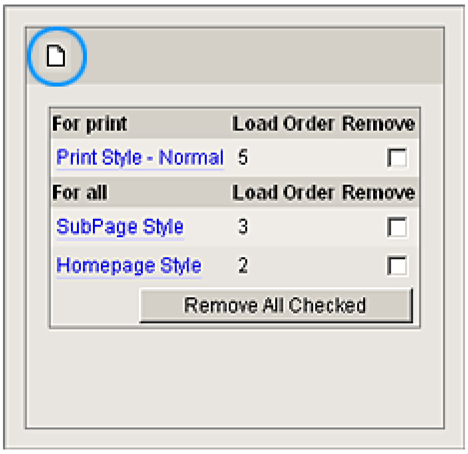
12.1 Importing a Style Sheet

1. Click on the ***Style Sheets*** option under ***Template Administration*** (click the **Index** link if you have already been working to get here 

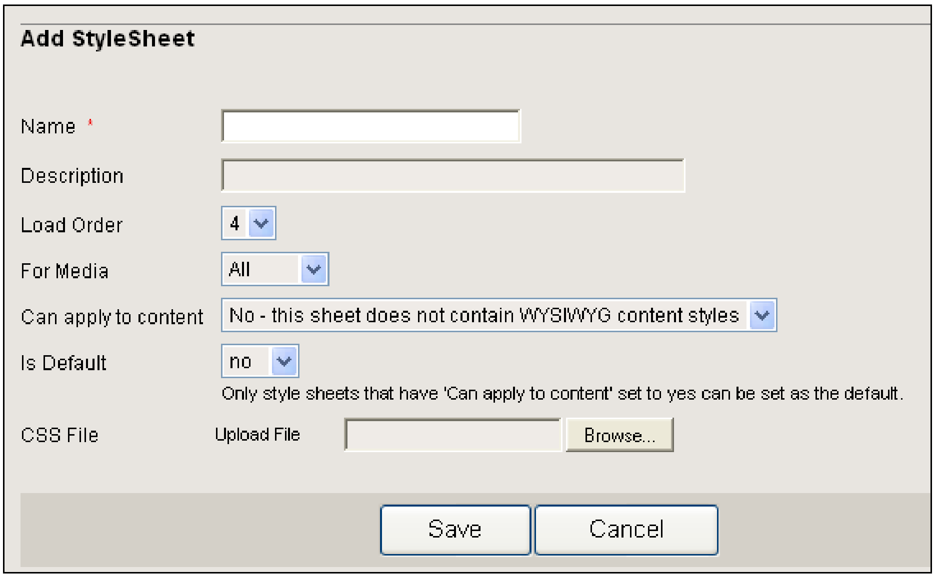
)

Note: *The Style Sheet Administration should load*

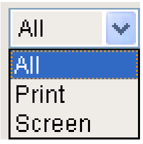
2. Click on the ***Add a New Style Sheet*** link



Note: *The Add/Edit a Style Sheet form should load (see below)*

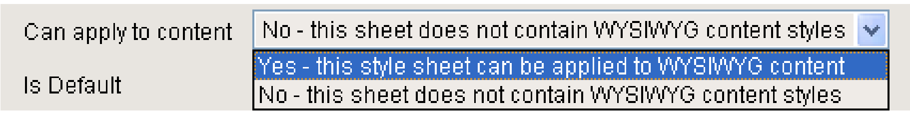


3. Enter a ***Name*** for the Style Sheet
4. Enter a ***Description*** for the Style Sheet
5. Choose the ***Load Order*** of the Style Sheet (The order in which it will appear in the content administration)
6. Choose the media type of the Style Sheet



> ***Tip:*** *Select* ***Print*** *if the Style Sheet is designed for print. Select* ***Screen*** *if the style sheet if for screen display only. If the Style Sheet is applicable to both print and screen then select* ***All***

7. Select ***Can Apply to content*** option- select either:



- **No - this sheet does not contain WYSIWYG content styles** (Content using the WYSIWQYG rich text editor)
- **Yes – this sheet can be applied to WYSISWYG content** (Content using the WYSIWQYG rich text editor)

8. Select Yes or No for default (Note: Only style sheets that have 'Can apply to content' set to yes can be set as the default.)
9. Click the ***Browse*** button to select the new style sheet file (with extension ***.css***) on your local or network drive
10. Click on the ***Save*** button to finish

> ***Tip:*** *You can now select the new Style Sheet when creating or editing a tier*

12.2 Deleting a Style Sheet

1. Click in the ***Remove*** checkbox option for the appropriate style sheet

2. Click on the ***Remove All Checked*** button

Note: *You will not be prompted to confirm the deletion of the style sheet*

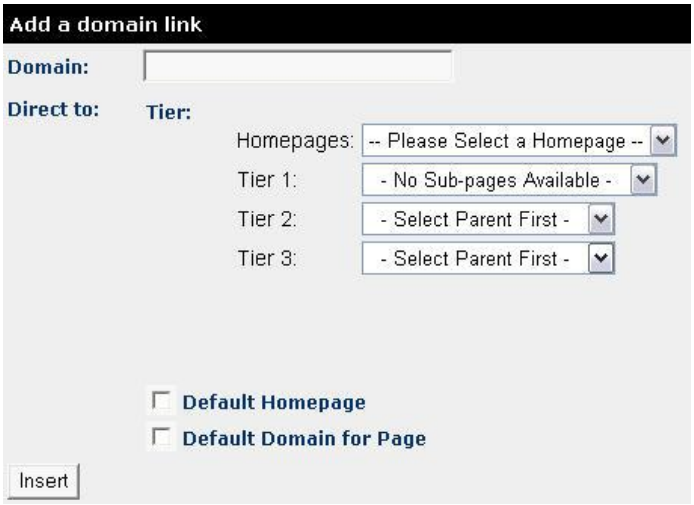
13 Domains Administration

Verdi can accommodate multiple website addresses for the same site, which may point to different pages within Verdi. Referred to as ***Domains***, the administration of website addresses requires advanced users with technical knowledge to apply domain name and location changes.

13.1 Adding a Domain

1. Click on the ***Domains Administration*** option

2. Enter a website address in the ***Domain*** text box. This should be a website address that you are directing users from. Users accessing this website address will be directed to whatever tier you select within Verdi.



Note: *The URL must be in the following format:* ***www.websiteaddress.com***

Select one of the following options:

a. Use the ***Tier*** drop-down menus to select a tier to direct users to; or
b. Select the ***Default Homepage*** checkbox to direct users towards the Verdi default homepage.

3. Click on the ***Insert*** button to finish

Tip: *Further domains can be added as required, which may direct other websites to pages within Verdi.*

13.2 Editing a Domain

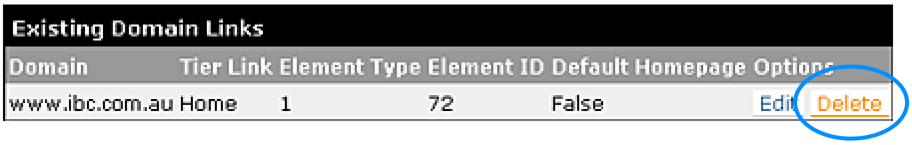
1. Click on the ***Edit*** option for the domain you would like to change

2. Make any required changes

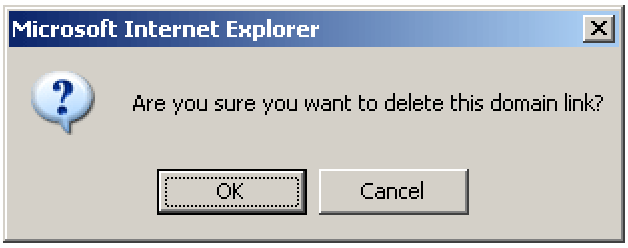
3. Click on the ***Update*** button to finish

13.3 Deleting a Domain

1. Click on the ***Delete*** option for the domain you would like to remove



2. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion



14 Template Administration

The Template Administration controls the layout of the tiers and the position of the content and modules on the pages within the site.

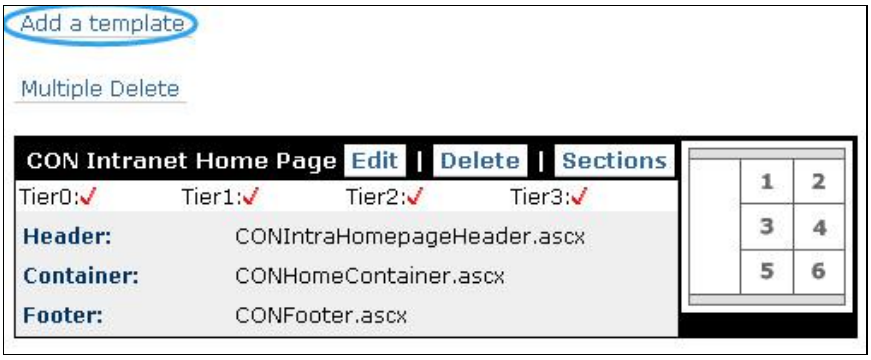
What is a Template?

Templates are used to define what **features** users of the Verdi Administration may select within a Tier page. Each template is divided into predefined grid sections. The templates that control this are pre-configured by the developers of your site within the development stage of the project. Usually a site will have at least two main templates: Homepage Template and Sub Page Template.

14.1 Adding a Template

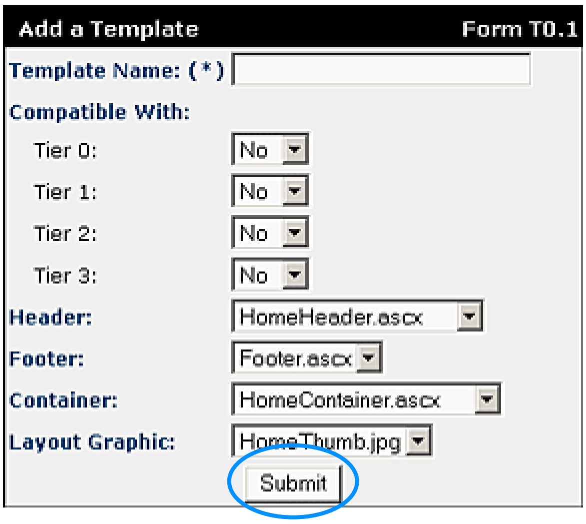
1. Click on the ***Templates*** option within the ***Template Administration*** menu

> ***Note:*** *The Templates Administration should load*



2. Click on the ***Add a Template*** link

> ***Note:*** *The Add a Template form should load*

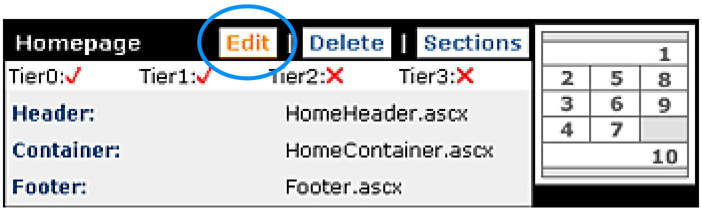


3. Enter a ***Template Name*** in the text box
4. Select which tiers are ***Compatible With*** the template. Depending upon your choices, the template will then be made available to users who administer tier 0, tier 1, tier 2, or tier 3 pages.
5. Select the preferred ***Header*** file for the template. Header files are non-editable and are created by IBC during the graphic consultation phase of the development. Each selection will display a different page layout.
6. Select the preferred ***Footer*** file for the template. Footer files are non-editable and are created by IBC during the graphic consultation phase of the development. Each selection will display a different page layout.
7. Select the preferred ***Container*** for the template. Container files are non-editable and are created by IBC during the graphic consultation phase of the development. Each selection will display a different page layout.
8. Select the preferred ***Layout Graphic*** for the template. This is a graphic display only, which displays the template layout that has been chosen for the tier in a grid table format
9. Click on the ***Submit*** button to finish

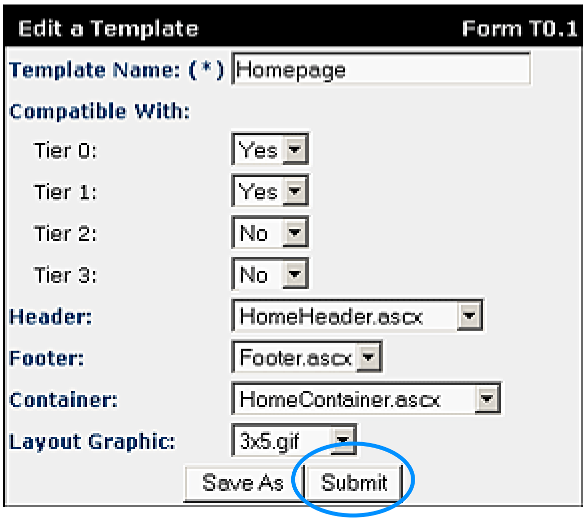
> ***Note:*** *The new template should now be displayed in the Templates Administration*

14.2 Editing an Existing Template

1. Click on the ***Edit*** option for the appropriate template



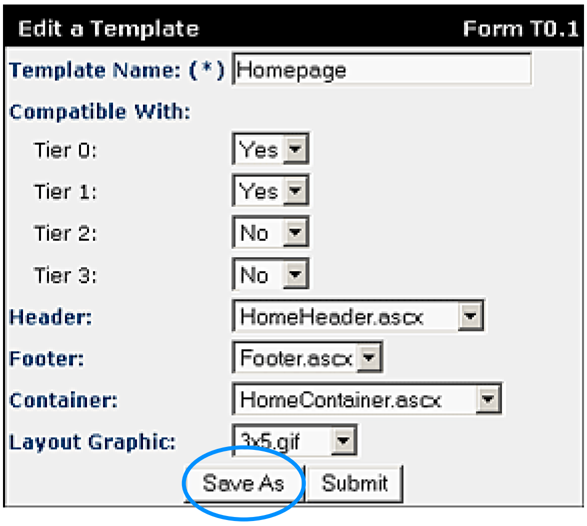
2. Make the necessary changes



3. Click on the ***Submit*** button to finish

14.3 Making a Copy of a Template

1. Click on the ***Edit*** option for the template you wish to copy
2. Make any required changes

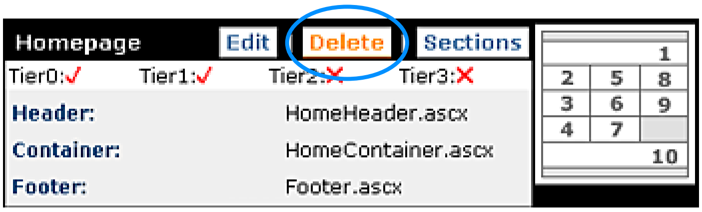


3. Click on the ***Save As*** button to finish

Note: *The new template should now be listed on the Templates Administration page. The new template will need to have its page (grid) sections setup before it can be used.*

14.4 Deleting a Single Template

1. Click on the ***Delete*** option for the appropriate template



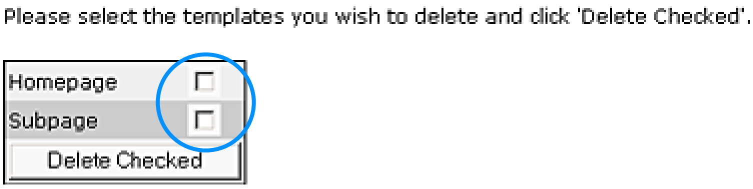
2. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion

14.5 Deleting Multiple Templates

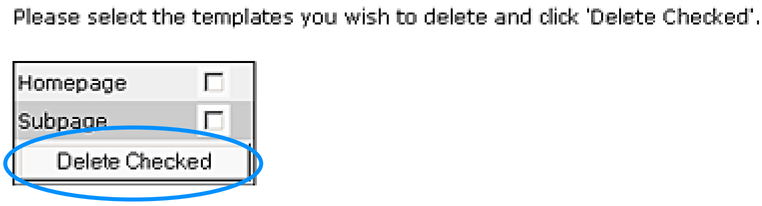
1. Click on ***Multiple Delete*** option

> ***Note:*** *A new popup window should load, listing all templates*

2. Select the templates you wish to remove by selecting the checkboxes



3. Click on the ***Delete Checked*** button



4. Click on the ***OK*** button to finish or click on ***Cancel*** to stop the deletion

14.6 Adding a New Page (Grid) Section to a Template

What is a Grid/ Section?

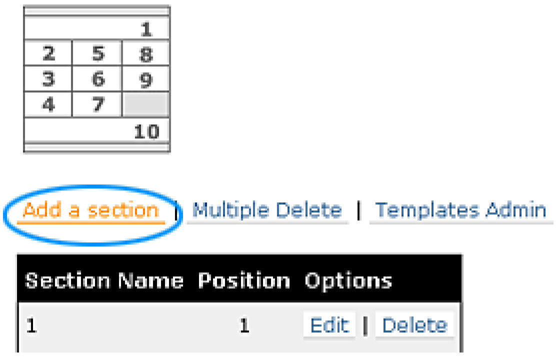
Each template is divided into a number of sections within a grid layout. Each section defines a space for a Module or Feature to be located.

1. Click on the ***Sections*** option for the template to which you would like to add a new page section.

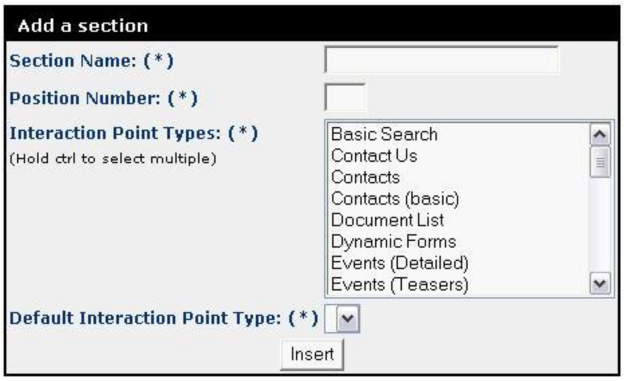
> ***Note:*** *The grid table determines the number of sections within the template you have chosen. The example above shows that the selected template has 10 sections available.*

> ***Note:*** *Interaction Point Types are Modules.*

2. Click on the ***Add a Section*** link.



> ***Note:*** *The Add a Section form should load.*



3. Enter a name for the section in the ***Section Name*** field. Example: '*Top Left*', '*Middle Centre*'.
4. Enter a ***Position Number*** for the section. The position number is the grid position number from the page template and is normally a number between 1 and 12 (10 in this example).
5. Select the preferred ***Interaction Point Type(s)*** (Modules), which you would like to make available for that section. Hold down the CTRL key on your keyboard to select multiple modules. Refer to Appendix I for a detailed description of each Module.
6. Choose a ***Default Interaction Point Type*** (Module) from the drop-down menu. This module will display by default, if no other module can be displayed in the page section.

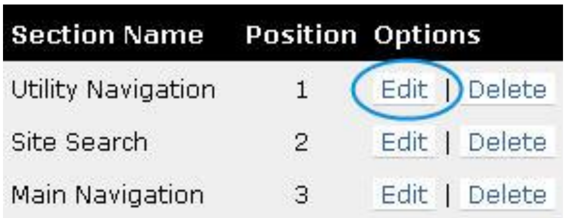
> ***Note:*** *Whatever modules are selected from the Interaction Point Types menu will populate the Default Interaction Point Type menu.*

7. Click the ***Insert*** button to finish

14.7 Editing a Page (Grid) Section

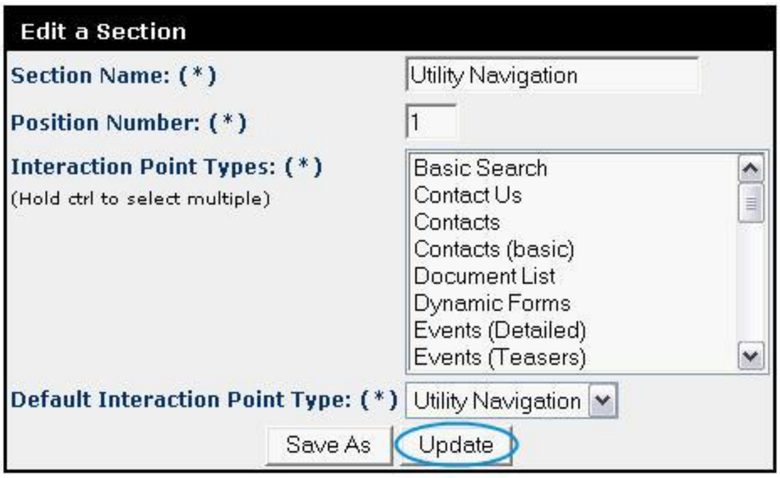
1. Click on the ***Section*** option for the appropriate template

2. Click on the ***Edit*** option for the appropriate section



Note: *The Edit a Section form should load.*

3. Make the necessary changes as required

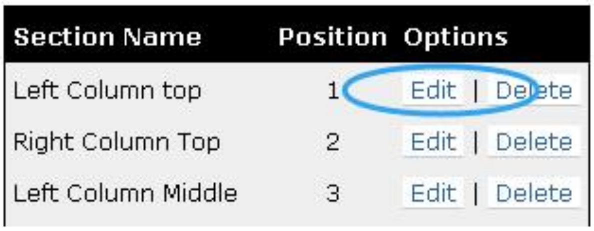


4. Click on the ***Update*** button to finish

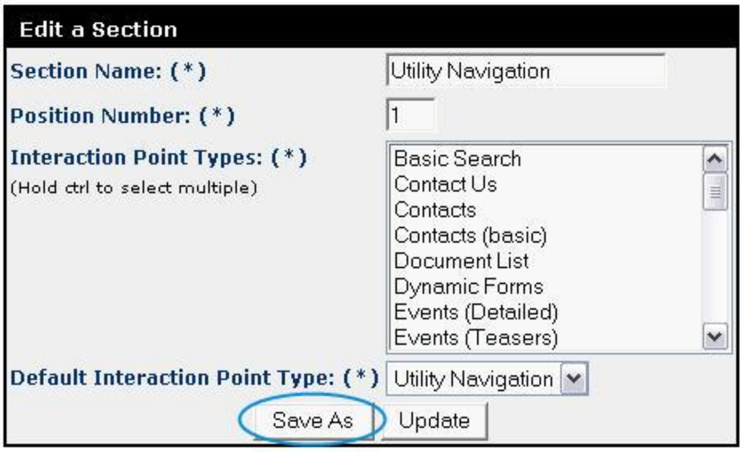
14.8 Making a Copy of a Page (Grid) Section

1. Click on the ***Sections*** option for the required template

2. Click on the ***Edit*** option for the section you wish to copy



3. Make any required changes to the section



4. Click on the ***Save As*** button to finish

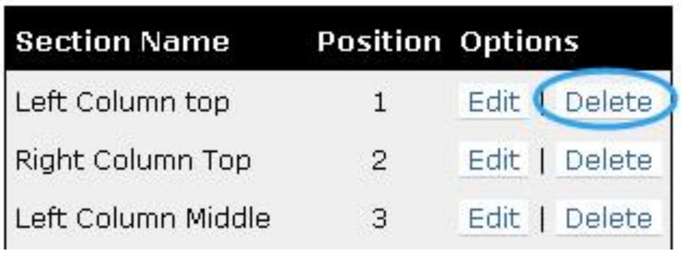
Note: *If the position number is already assigned to a section within the template then you will be prompted that this is the case.*

Tip: *The new section should now be listed on the template sections page*

14.9 Deleting a Page (Grid) Section

1. Click on the ***Sections*** option for the appropriate template

2. Click on the ***Delete*** option for the appropriate section

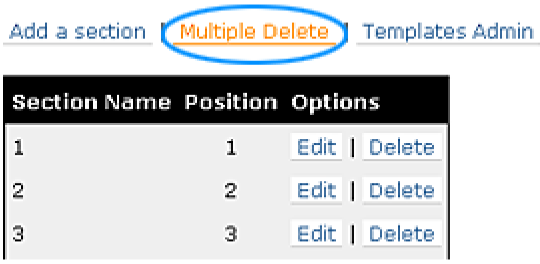


3. Click on the ***OK*** button to finish or click ***Cancel*** to stop the deletion

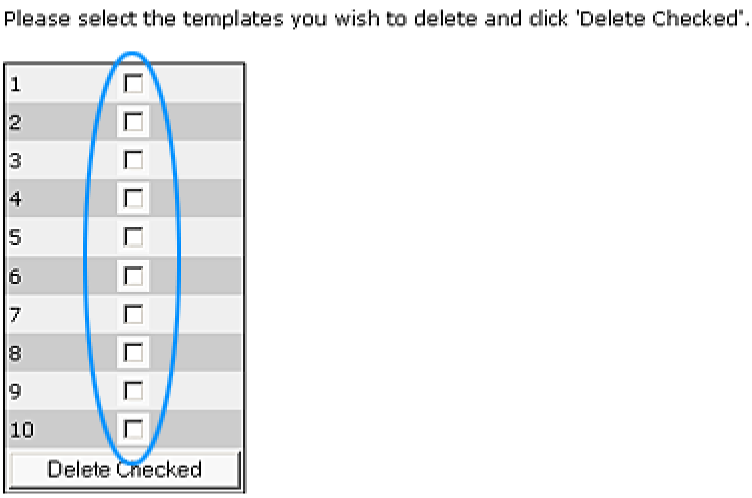
14.10 Deleting Multiple Pages (Grid) Sections

1. Click on the ***Sections*** option for the required template

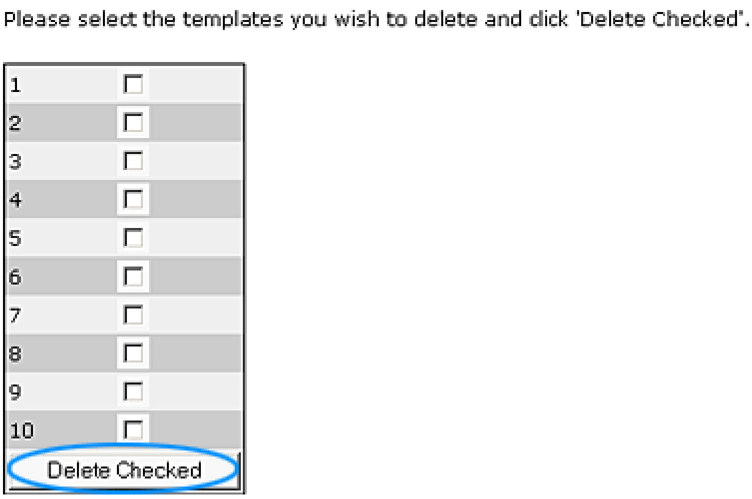
2. Click on the ***Multiple Delete*** option



3. Choose the sections you wish to remove by clicking in the check boxes provided.



4. Click on the ***Delete Checked*** button



5. Click on the ***OK*** button to finish or click ***Cancel*** to stop the deletion

15 Custom Fields Administration

What is a Custom Field?

Custom fields allow Verdi to perform customised functionality for each individual Verdi instance while keeping the core product untouched. When you add custom fields for Content Formats you are adding additional Meta Data fields to Content files that have been assigned to that format.

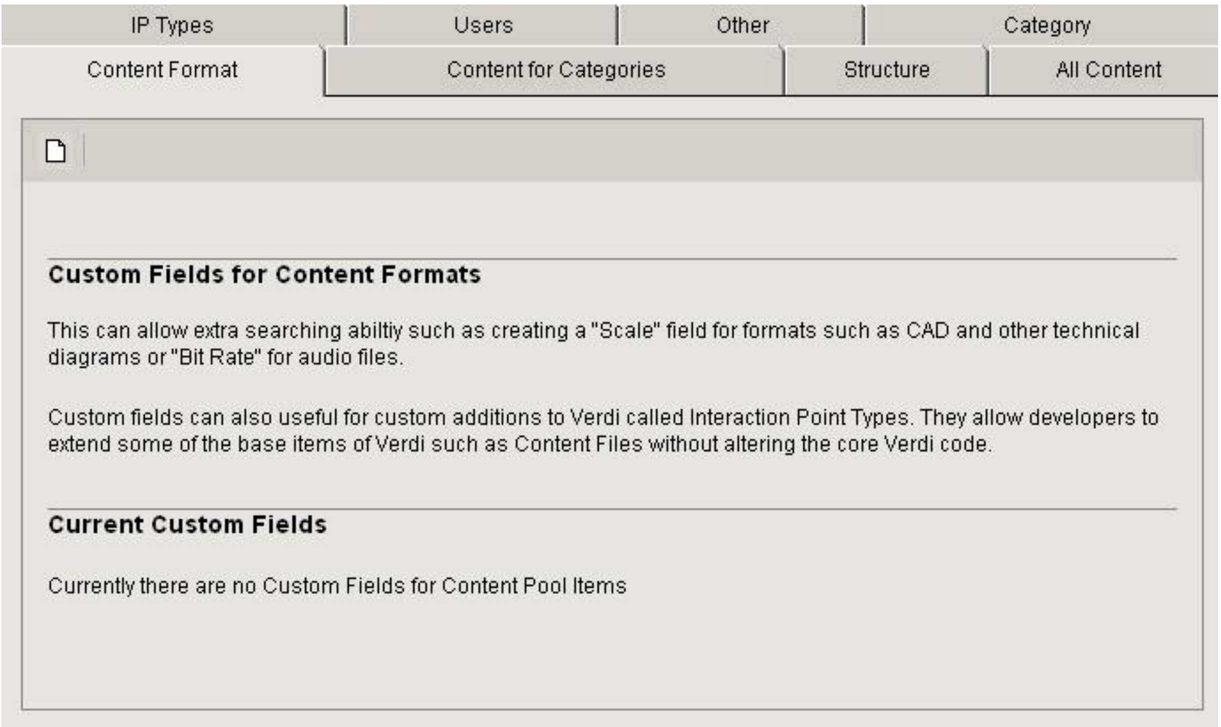
This can allow extra searching ability such as creating a "Scale" field for formats such as CAD and other technical diagrams or "Bit Rate" for audio files.

Verdi allows site administrators to add custom fields Metadata for the following items:

- Content Format
- IP Types (Modules)
- Content for Categories
- Category
- Structure
- All Content
- Users
- Other

Within the ***Advanced*** menu click on the ***Custom Fields Administration*** option

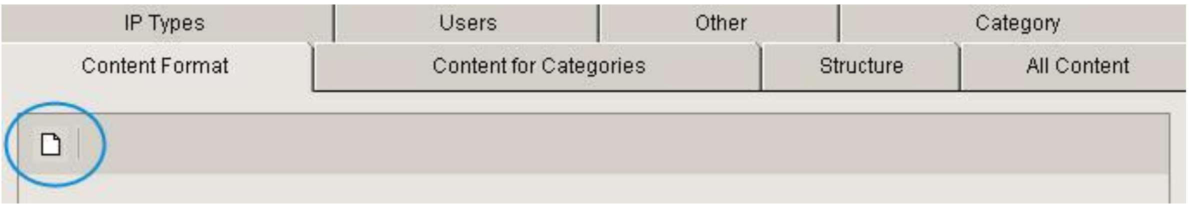
***Note**: The **Custom Fields Administration** will load and default to the Content Format tab*



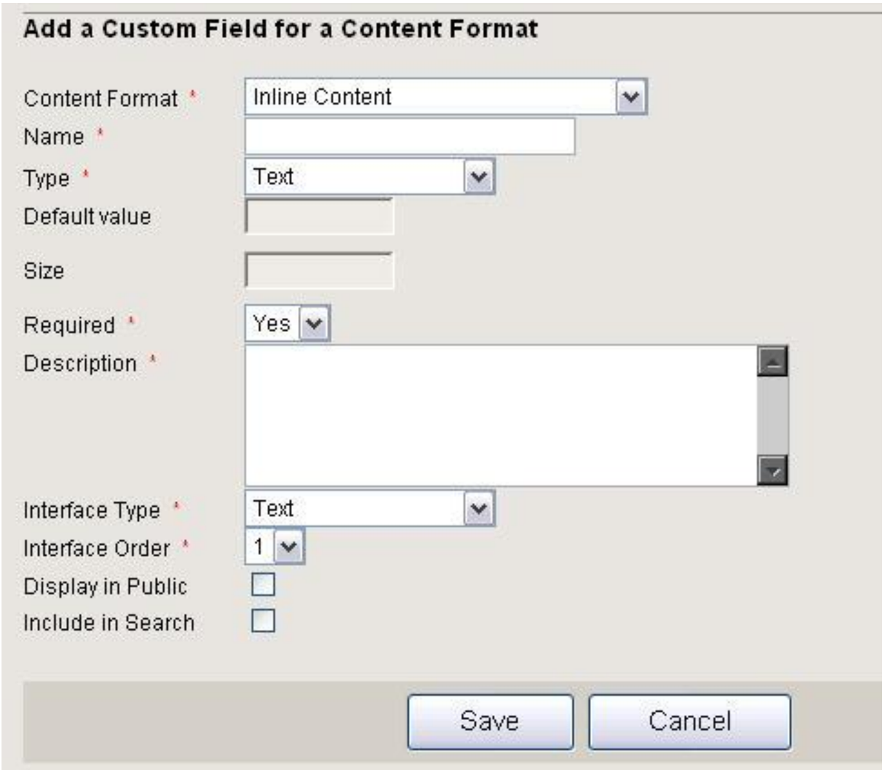
15.1 Adding a Custom Field to a Content Format

***Note**: When entering the Custom Fields administration the Content Format tab will be active*

1. Click on the ***New*** button.



***Note**: The **Add a Custom Field for a Content Format** administration will load*



2. Select the ***Content Format*** from the drop-down menu to add a field to.
3. Enter a ***Name*** for the field.
4. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:

   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

5. Enter a ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.
6. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50
7. Select if the field is mandatory using the ***Required*** drop-down menu
8. Enter a ***Description*** for the field.
9. Use the ***Interface Type*** drop-down menu to select a field type to add.

   Options Include:

   - Text – Adds a text field
   - Text Area – Adds a text box field
   - Select – Adds a drop-down list box
   - Tree – Adds a tree structure
   - Radio Buttons – Adds radio button fields

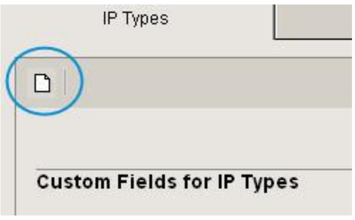
10. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
11. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

15.2 Adding a Custom Field to an IP Type (Module)

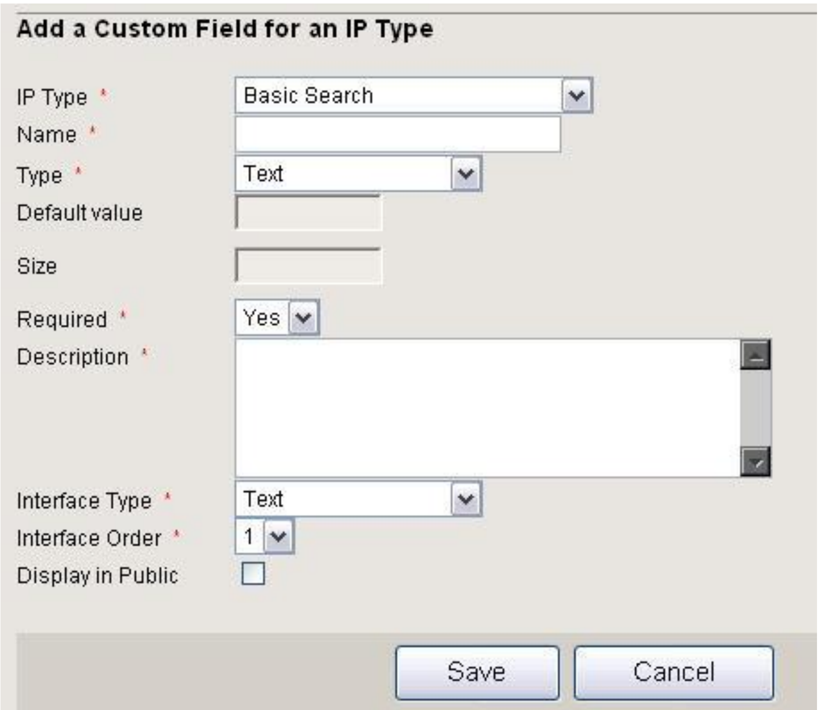
1. Select the **IP Types** tab

2. Click on the ***New*** button.



> ***Note****: The* ***Add a Custom Field for an IP Type*** *administration will load*

3. Select the ***IP Type*** that you want to add a custom field to.



4. Enter a ***Name*** for the field.
5. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:
   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

6. Enter a ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.
7. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50.
8. Select if the field is mandatory using the ***Required*** drop-down menu
9. Enter a ***Description*** for the field.
10. Use the ***Interface Type*** drop-down menu to select a field type to add.

    Options Include:

    - Text – Adds a text field
    - Text Area – Adds a text box field
    - Select – Adds a drop-down list box
    - Tree – Adds a tree structure
    - Radio Buttons – Adds radio button fields

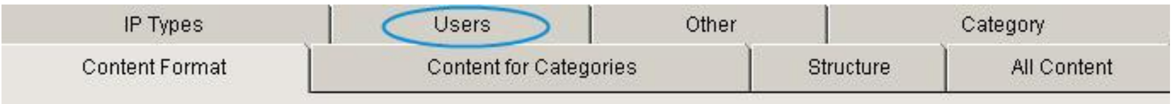
11. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
12. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

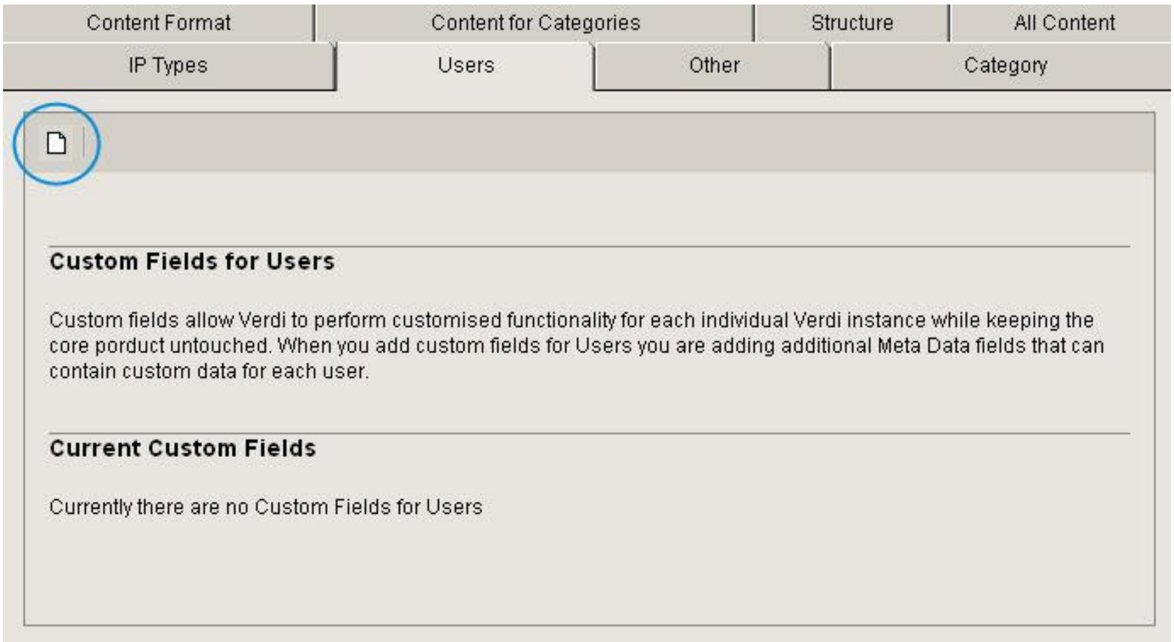
15.3 Adding a Custom Field to Users

> ***Note**: When entering the Custom Fields administration the Content Format tab will be active*

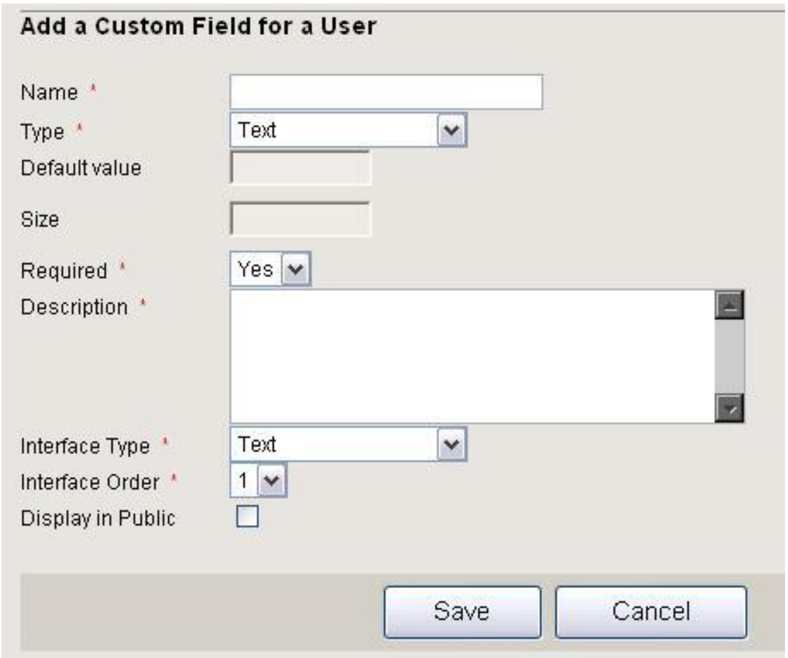
1. Click on the ***Users*** tab.



2. Click on the ***New*** button.



> ***Note**: The **Add a Custom Field for an Users** administration will load*



3. Enter a ***Name*** for the field.

4. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:
   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

5. Enter a ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.
6. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50.
7. Select if the field is mandatory using the ***Required*** drop-down menu
8. Enter a ***Description*** for the field.
9. Use the ***Interface Type*** drop-down menu to select a field type to add.

   Options Include:

   - Text – Adds a text field
   - Text Area – Adds a text box field
   - Select – Adds a drop-down list box
   - Tree – Adds a tree structure
   - Radio Buttons – Adds radio button fields

10. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
11. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

15.4 Adding a Custom Field to a Content Category

***Note**: When entering the Custom Fields administration the Content Format tab will be active*

1. Click on the ***Category*** tab.

2. Click on the ***New*** button.

***Note**: The **Add a Custom Field for All Content** administration will load*

3. Enter a ***Name*** for the field.
4. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:

   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

5. Enter a ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.

6. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50
7. Select if the field is mandatory using the ***Required*** drop-down menu
8. Enter a ***Description*** for the field.
9. Use the ***Interface Type*** drop-down menu to select a field type to add.

   Options Include:

   - Text – Adds a text field
   - Text Area – Adds a text box field
   - Select – Adds a drop-down list box
   - Tree – Adds a tree structure
   - Radio Buttons – Adds radio button fields

10. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
11. Select ***Display in Public*** if applicable.
12. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

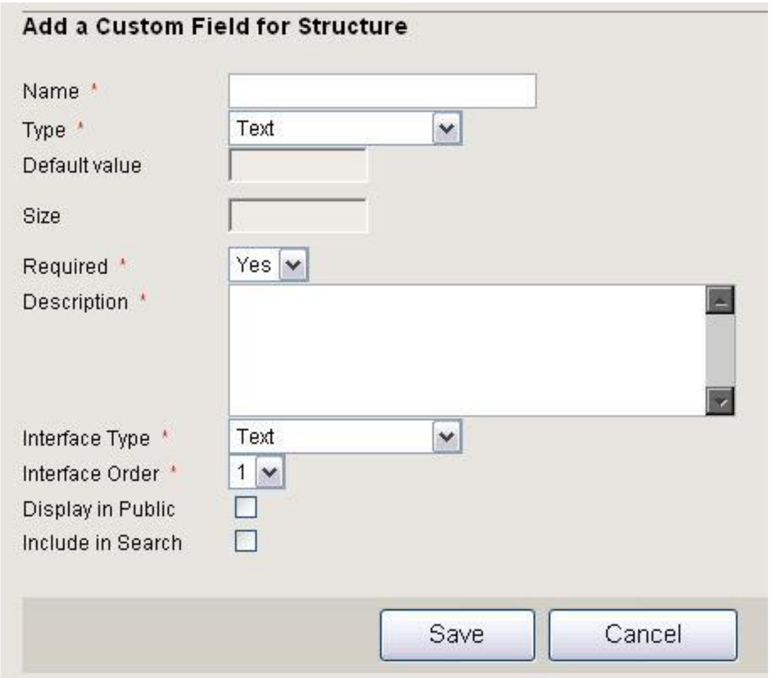
15.5 Adding a Custom Field to Structure

***Note**: When entering the Custom Fields administration the Content Format tab will be active*

1. Click on the ***Content Categories*** tab.

2. Click on the ***New*** button.

***Note**: The **Add a Custom Field for Structure** administration will load*



3. Enter a ***Name*** for the field.
4. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:

   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

5. Enter a ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.
6. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50
7. Select if the field is mandatory using the ***Required*** drop-down menu
8. Enter a ***Description*** for the field.
9. Use the ***Interface Type*** drop-down menu to select a field type to add.

   Options Include:

   - Text – Adds a text field
   - Text Area – Adds a text box field
   - Select – Adds a drop-down list box
   - Tree – Adds a tree structure
   - Radio Buttons – Adds radio button fields

10. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
11. Select ***Display in Public*** and / or ***Include in Search*** if applicable.
12. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

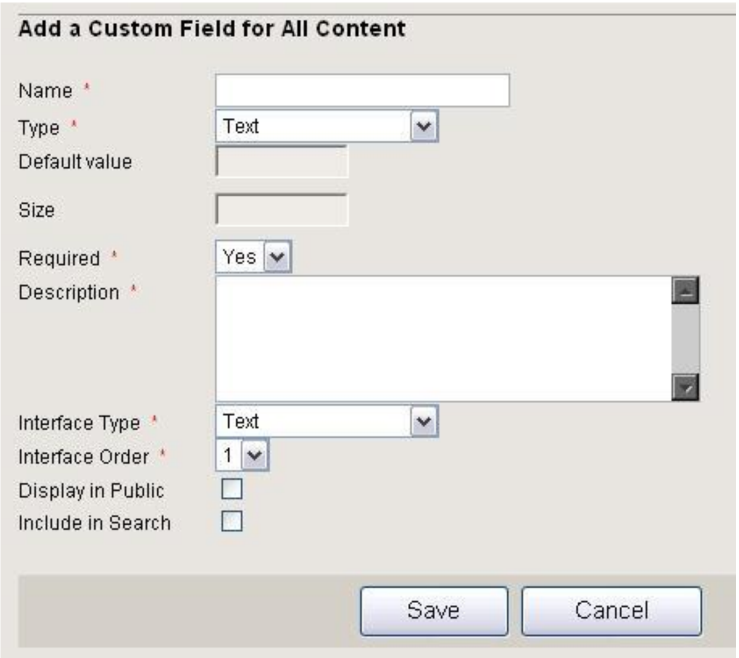
15.6 Adding a Custom Field to All Content

__Note__: When entering the Custom Fields administration the Content Format tab will be active

1. Click on the ***All Content*** tab.

2. Click on the ***New*** button.

__Note__: The __Add a Custom Field for All Content Structure__ administration will load



3. Enter a ***Name*** for the field.
4. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:

   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format
   - Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
   - Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
   - URL - the user input into the field is in a valid website address format
   - Section Title

5. Enter a Default value for the custom flied (if applicable). This will be what is displayed by default in the field
6. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50.
7. Select if the field is mandatory using the ***Required*** drop-down menu
8. Enter a ***Description*** for the field.
9. Use the ***Interface Type*** drop-down menu to select a field type to add.

   Options Include:

   - Text – Adds a text field
   - Text Area – Adds a text box field
   - Select – Adds a drop-down list box
   - Tree – Adds a tree structure
   - Radio Buttons – Adds radio button fields

10. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
11. Select ***Display in Public*** and / or ***Include in Search*** if applicable
12. Click the **Save** button to finish.

> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

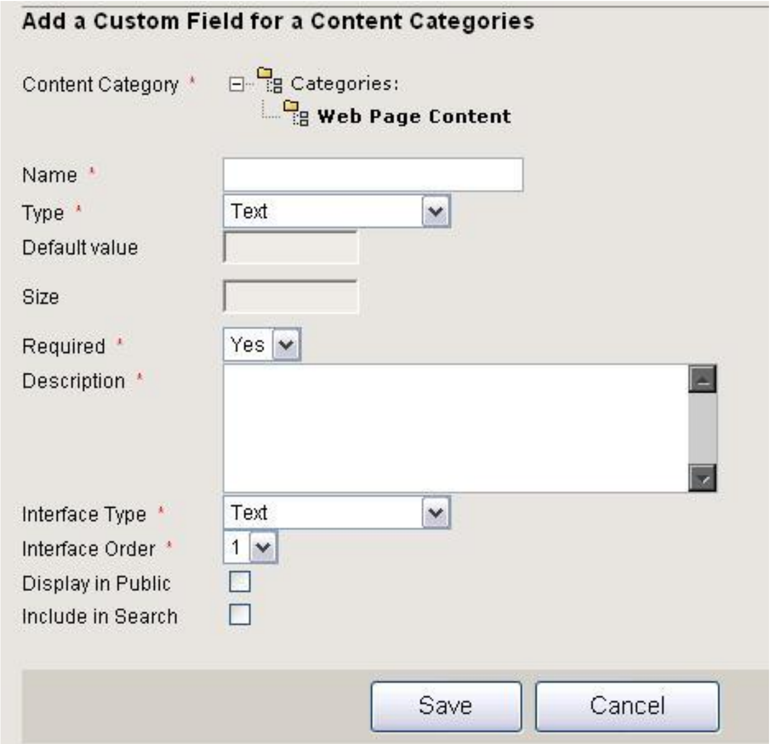
15.7 Adding a Custom Field to Content for Categories

***Note**: When entering the Custom Fields administration the Content Format tab will be active*

1. Click on the ***Content for Categories*** tab.

2. Click on the ***New*** button.

***Note**: The **Add a Custom Field for Content Categories** administration will load*



3. Select the ***Content Category***.
4. Enter a ***Name*** for the field.
5. Choose a ***Type*** for the field. This is a validation for the field and will check if the input into the field matches the restriction chosen.

   Options Include:

   - Text
   - Number - Checks if the user input into the field is a number
   - Email - Checks if the user input into the field is in a valid email address format
   - Document – Allows for a document upload.
   - Image – Allows for an image upload.
   - Date - Checks if the user input into the field is in a valid date format
   - Date/Time (24 hour) - Checks if the user input into the field is in a valid 24 hour date format
   - Time (24 hour) - Checks if the user input into the field is in a valid 24 hour time format

- Date/Time (12 hour) - Checks if the user input into the field is in a valid 12 hour date format
- Time (12 hour) - Checks if the user input into the field is in a valid 12 hour time format
- URL - the user input into the field is in a valid website address format
- Section Title

6. Enter ***Default value*** for the custom field (if applicable). This will be what is displayed by default in the field.
7. Enter a ***Size*** for the custom field (if applicable). This figure determines the length of the text box for the field. A common value is 50
8. Select if the field is mandatory using the ***Required*** drop-down menu
9. Enter a ***Description*** for the field.
10. Use the ***Interface Type*** drop-down menu to select a field type to add.

    Options Include:

    - Text – Adds a text field
    - Text Area – Adds a text box field
    - Select – Adds a drop-down list box
    - Tree – Adds a tree structure
    - Radio Buttons – Adds radio button fields

11. Use the ***Interface Order*** drop-down menu to select the position where the custom field will be placed (if there is more than one custom field then this list will have several position numbers).
12. Select ***Display in Public*** and / or ***Include in Search*** if applicable
13. Click the **Save** button to finish.

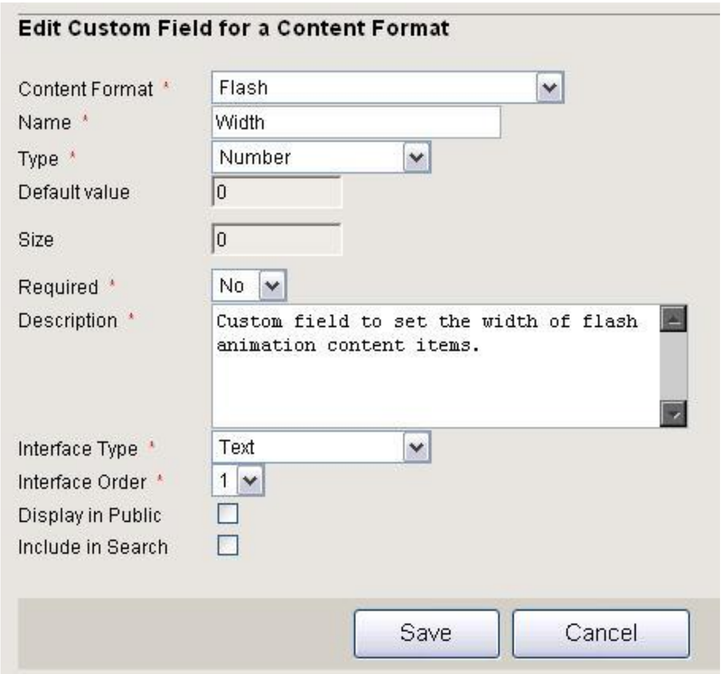
> ***Note****: If you have chosen* ***Select****,* ***Tree*** *or* ***Radio Buttons*** *as the interface type then you will be required to add options to the field.*

15.8 Editing Custom Fields

1. Select the tab where the ***Custom Field*** that you want to edit resides.
   - Content Format
   - Content for Categories
   - Structure
   - All Content
   - IP Types
   - Users
   - Other
   - Category

2. Scroll down to the ***Current Custom Fields*** section.
3. Click the ***Edit*** action for the Custom Field you want to edit.

***Note**: The **Edit Custom Field** administration will load*



4. Make any required changes.
5. Click the ***Save*** button to finish.

15.9 Deleting Custom Fields

1. Select the tab where the ***Custom Field*** that you want to edit resides.
   - Content Format
   - Content for Categories
   - Structure
   - All Content
   - IP Types
   - Users
   - Other
   - Category

2. Scroll down to the ***Current Custom Fields*** section.
3. Click the ***Delete*** action for the Custom Field you want to remove.

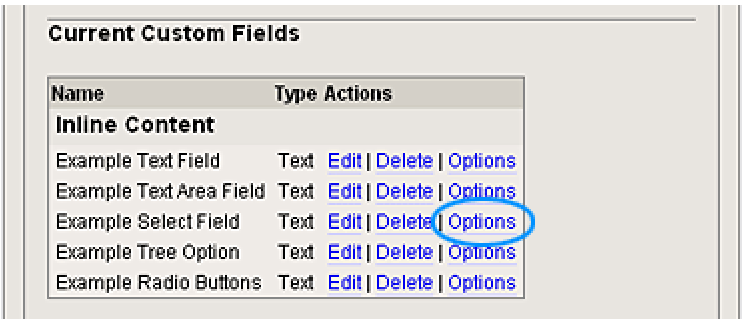
4. Click on the ***OK*** button to confirm or click on the ***Cancel*** button to stop the deletion

15.10 Adding Options to Custom Fields

What are Custom Field <u>Options</u>?

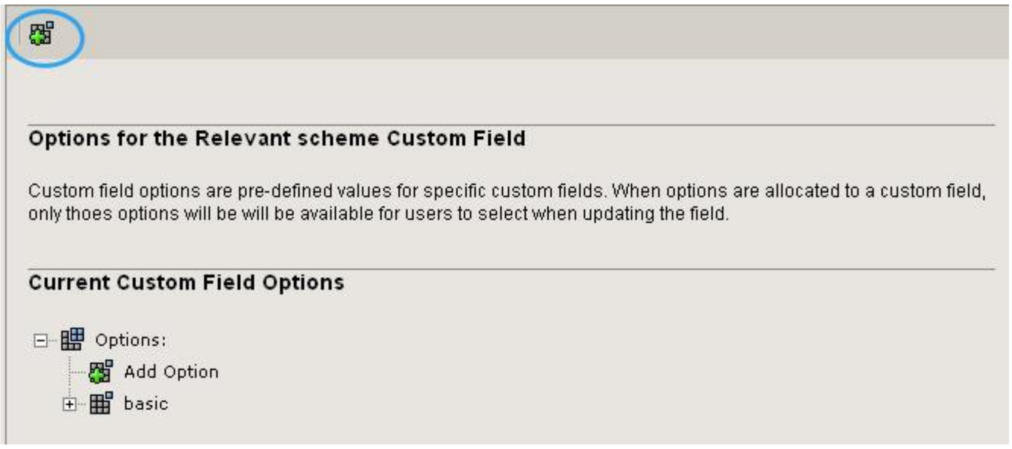
Custom field options are pre-defined values for specific custom fields. When options are allocated to a custom field, only those options will be available for users to select when updating the field.

1. Select the tab where the ***Custom Field*** that you want to edit resides.
   - Content Format
   - Content for Categories
   - Structure
   - All Content
   - IP Types
   - Users
   - Other
   - Category
2. Scroll down to the ***Current Custom Fields*** section.
3. Click the ***Options*** action for the Custom Field you want to add options to.



Note*: The Options administration form will load*

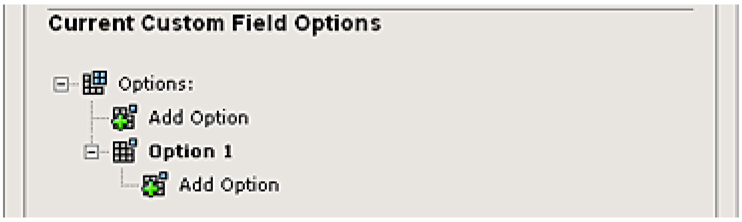
4. Click the ***Add Option*** link.



Note*: The Add Options form will load*

5. Enter ***Text*** for the Custom Field Option.
6. Enter a ***Value*** for the Custom Field Option.
7. Click the ***Save*** button to add the Custom Field Option.

> ***Note****: The Current Custom Field Option administration form will load displaying the current options that have been added. Repeat this process to add more options the Custom Field.*
>
> *To add sub options to existing option simply click the Add Option for that Option.*



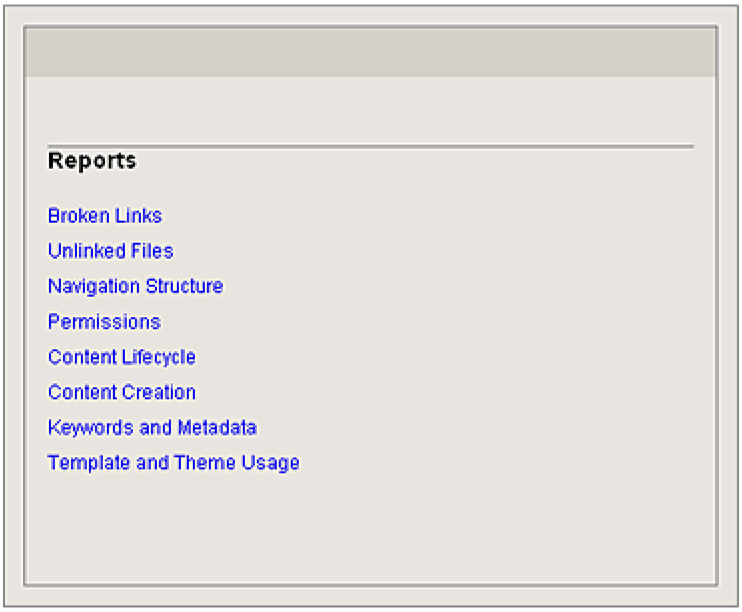
16 Verdi Administration Reports

A number of standard reports can be run within Verdi which provide useful information for site housekeeping and maintenance.

16.1 Accessing the Reports and an Overview of the Standard Reports

1. From the ***Index page*** click on ***Reports*** option within the ***Advanced*** menu.

> ***Note**: The reports described below are Verdi default reports. Depending on your organisations requirements, you may have additional, customised reports.*



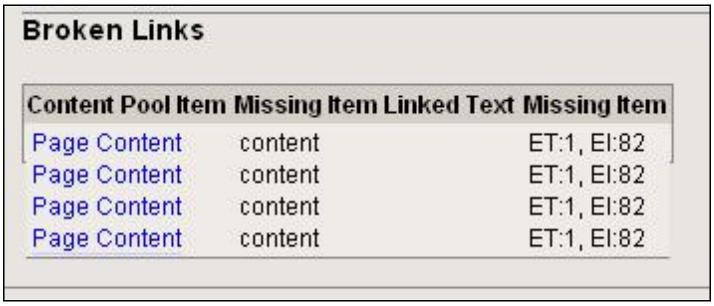
Summary of the Standard Reports

Report Name	Description
Broken Links	Track pages containing link(s) to content that no longer exists within the site.
Unlinked Files	Locate and report unlinked content items
Navigation Structure	A ‘sitemap’ showing the site Tier Structure
Permissions	Permission allocation table
Content Lifecycle	When each content item was: created, published, modified, and where applicable, when it expires
Content Creation	Name, Create Date, Author, Format and Keywords for Content Pool items.
Keywords and Metadata	Metadata and Keyword Information entered.
Template and Theme Usage	Track how many times each template is used.

16.2 Broken Links Report

The Broken Links report tracks pages containing link(s) to content that no longer exist within the site.

1. Click on the ***Broken Links*** menu option. The report will be generated.



Broken Links

Content Pool Item	Missing Item Linked Text	Missing Item
Page Content	content	ET:1, EI:82
Page Content	content	ET:1, EI:82
Page Content	content	ET:1, EI:82
Page Content	content	ET:1, EI:82

> ***Note**: The report will list the content pool items that have broken links within the content. Clicking on the required content pool item within the list will load the content pool item. The content item will require editing to fix the broken link.*

2. To review the item that has the broken links, select the pages hyperlink within the report listing.

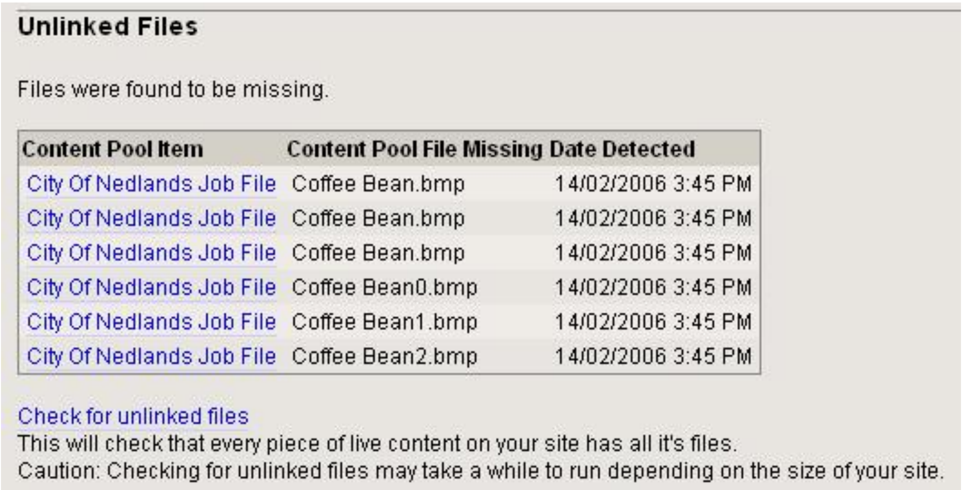
16.3 Unlinked Files Report

The Unlinked Files Report locates and reports on all unlinked content items within your site.

1. Click on the ***Unlinked Files*** menu option.
2. Click on the ***Check for Unlinked Files*** option to begin generating the report.

> ***Note**: The report will list content items that have unlinked files. The content item will require editing to fix the unlinked files.*

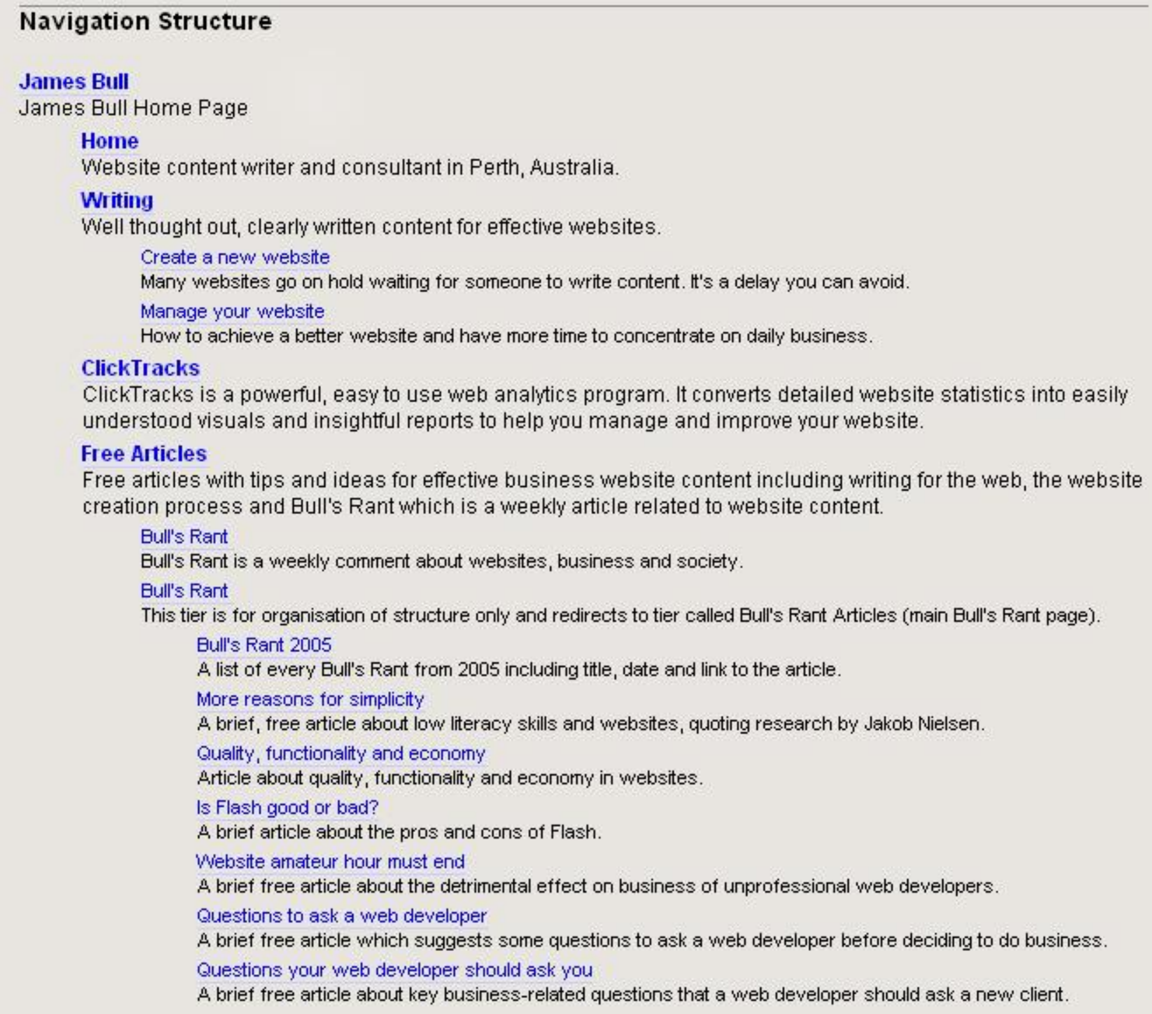
3. To review the item that has the unlinked files, select the pages hyperlink within the report listing.



16.4 Navigation Structure Report

The Navigation Structure Report displays a ‘site map’ view of your sites page/ tier structure.

1. Click on the ***Navigation Structure*** menu option.

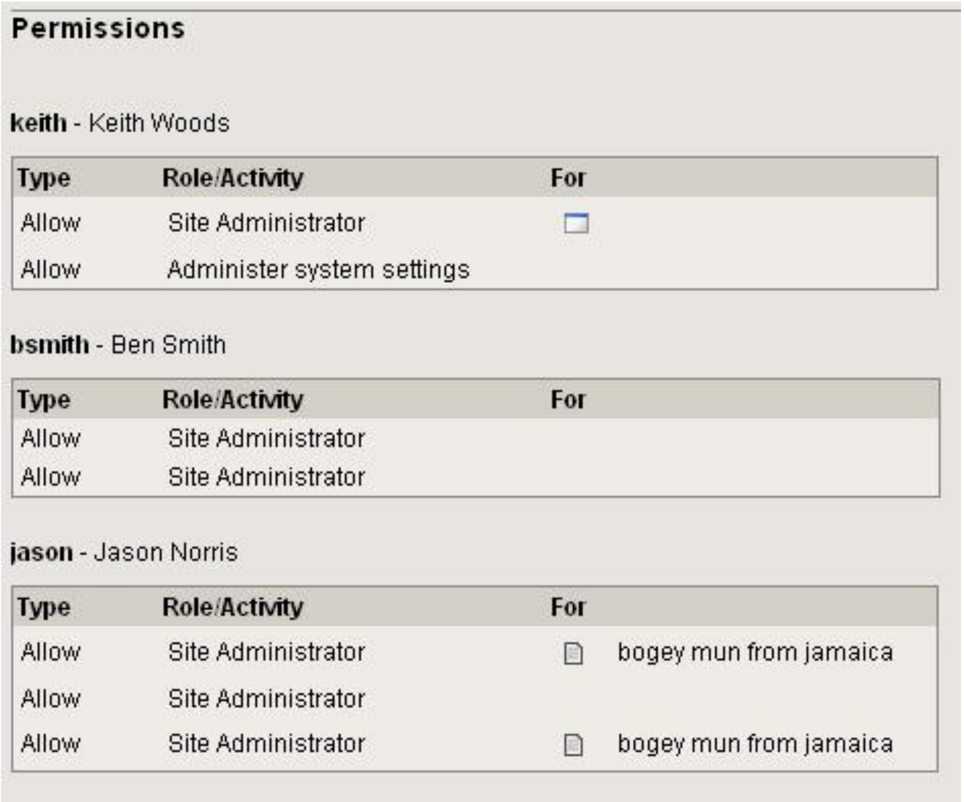


***Note**: The report will generate a snapshot of the current site map, which may be printed using your browser print function.*

16.5 Permissions Report

The Permissions Report displays a complete allocation listing of each users permissions, both administration and public permissions.

1. Click on the ***Permissions*** menu option. The report will start generate a listing of all the users permissions (roles and activities).



Permissions

keith - Keith Woods

Type	Role/Activity	For
Allow	Site Administrator	
Allow	Administer system settings	

bsmith - Ben Smith

Type	Role/Activity	For
Allow	Site Administrator	
Allow	Site Administrator	

jason - Jason Norris

Type	Role/Activity	For
Allow	Site Administrator	bogey mun from jamaica
Allow	Site Administrator	
Allow	Site Administrator	bogey mun from jamaica

> ***Note**: The report lists all tiers, with associated users and the permissions that the user has. The report may be printed using your browser print function.*

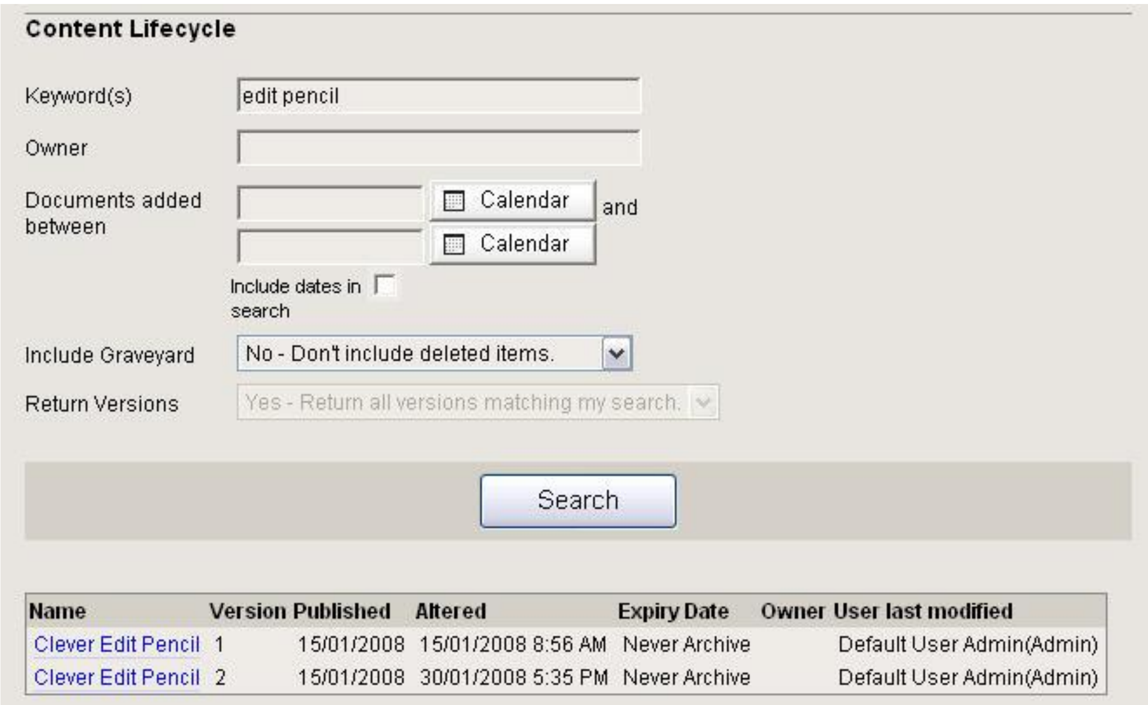
16.6 Content Lifecycle Report

The Content Lifecycle Report reports on each content item, displaying when the content item was created, published, modified, and where applicable, when it expires

1. Click on the ***Content Lifecycle*** menu option.
2. Use the search form to enter search parameters and click on the ***Search*** button.

> ***Note**: The search will generate the report.*

3. The search will generate a report listing and its associated creation date, published date, last modified date and expiry date.



4. Clicking on the content item name will load the content item for review.

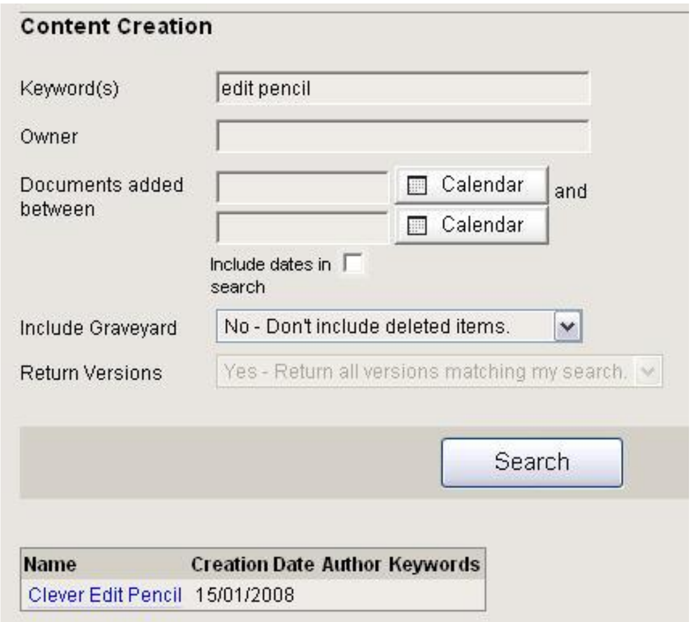
16.7 Content Creation Report

The Content Creation Report reports on each content item, displaying the items Name, Create Date, Author, Format and Keywords for Content Pool items.

1. Click on the ***Content Creation*** menu option
2. Use the search form to enter your search parameters and click on the ***Search*** button

> ***Note**: The report will list each content item and its associated creation date, author, content format, file size and keywords. Clicking on the content item name will load the content item for review.*

3. The search will generate a report listing and its associated creation date, published date, last modified date and expiry date.

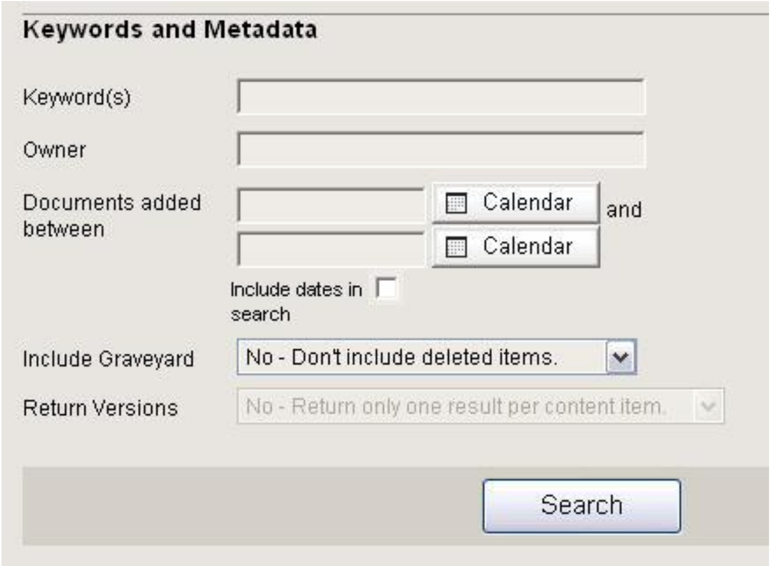


4. Clicking on the content item name will load the content item for review.

16.8 Keywords Report

The Keywords Report displays all the metadata and keyword information entered into the administration of the site.

1. Click on the ***Keywords and Metadata*** menu option
2. Use the search form to enter your search parameters and click on the ***Search*** button

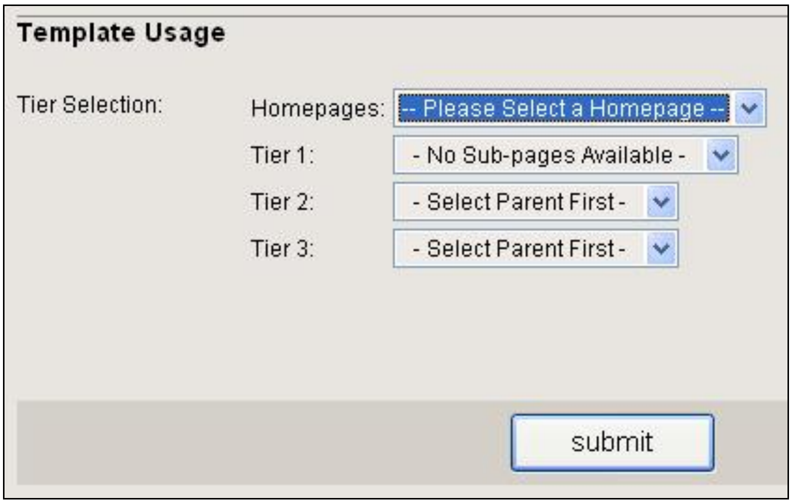


***Note**: The report will list each tier and its metadata and keywords. Clicking on the content item name will load the content item metadata for review.*

16.9 Template Usage Report

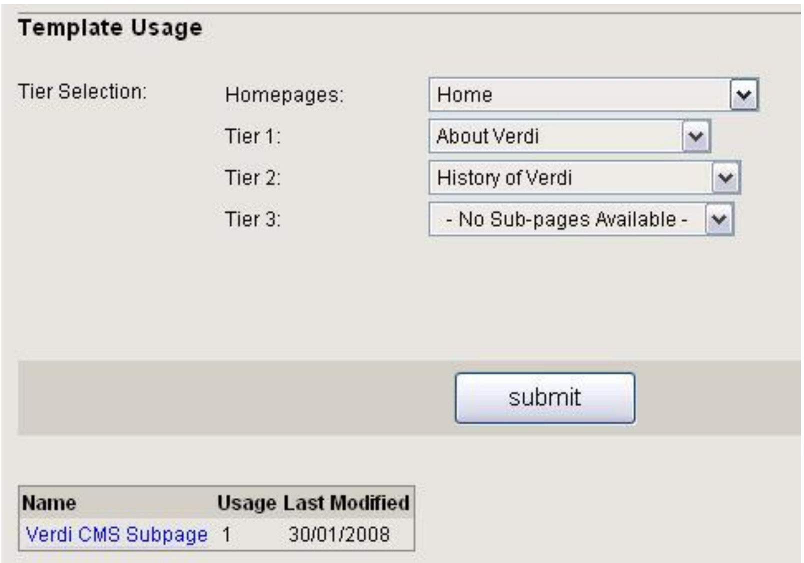
The Template usage report tracks how many times each template is used within selected areas of the site.

1. Click on the ***Template and Theme Usage*** menu option



2. Use the ***Tier Selection*** drop-down menus to select a page to run the report on and click on the ***Submit*** button.

3. The report will list each tier template and the number of pages it has been used on and when the template was last modified.



17 Appendix I – Interaction Point Types (Modules)

Below is a list of Verdi Modules

INTERACTION POINT	DESCRIPTION / FUNCTION
Business Directory	
Business Directory Search	To search for suppliers within the REM (Regional Electronic Marketplace)
Content Listing	
All forms	To list all dynamic forms
Content Pool List	To list all documents with search feature
Content Pool List (No Widget)	To list all documents without search feature
Document List	To display a table, containing a consistently formatted list of documents. Documents must be manually assigned to the module, and their order in the list can be pre-determined.
Document List with Search	As with “Document List” module, with an additional Keyword Search field displayed above the list.
Document Management System	To display upload/ download feature
In-Line Content	To display in-line HTML content.
In-Line Content (No Location)	As with “In-Line Content”, but will display any content assigned to a page which has not been specifically assigned to a template location.
In-Line Content by Section ID	As with “In-Line Content”, but will be displayed in a specific template section, as defined in the admin. Typically this is the most commonly used module on a website, allowing text, images and links to be displayed on screen.
Related Documents	To display Content Pool Item Files assigned to the current Tier. Includes link to download the file.
Features	
Ad Display	To display advertisement in the content of the section to which it is assigned
Auto Email	To include automatic Email
Contact Us	To display a Contact Us form. On submitting the form, an email will be sent to the designated admin user.
Contact	To display contact information for the current page, based on settings in the admin.
Contacts (with optional fields)	As “Contacts” but with more information
Contact (basic)	To include contact with basic information
Content Info	To display information on content
Dynamic Forms/ Inline forms	To display a dynamic form. The location for the required form must also be set to the page to be displayed on using locations in the features > Dynamic Forms administration.
Email to a Friend	To display an Email this page to a Friend form
Events	To display a listing of Events (also described as “Calendar Events”)
Events (Summary)	To display Events summary
Events (Teaser)	To display a list of Teasers for Events. This list will typically provide less information than the full Events module, intended as a teaser to the full information. Each teaser is linked, in the admin, to the full Events display module, so that the full information can be viewed.
Events Teaser (homepage)	To display event teasers in Homepage. This module typically displays an even briefer version of Events (teaser), in that the teasers each comprise of an image with a link to the full article.
FAQs	To display a list of FAQs, compiled from the locations which each FAQ is assigned to in the admin.
Forum (Display)	To display forum boards
Forum (Top Threads)	To list active forums
Home Page Events	To display Events in Home Page
Home Page News	To display News in Home Page
Job list All	To list all jobs
Job Tier	To list all jobs in the specific tiers
Mailing Lists	To display a sign up form to allow members of the publis to

INTERACTION POINT	DESCRIPTION / FUNCTION
	subscribe to one or more mailing lists.
Make a Default Homepage	To make current page as homepage
New Since Last Login	To send a notification to subscribers, regarding any recent changes to the current page, since their last login
News (Articles)	To display a listing of News Articles. Clicking the summary of each news article will refresh the current page and display the full news article. There is then a link to go back to the full listing.
News (Teasers)	To display teasers for News articles, which typically displays less information that the full News module, intended as a teaser to the full information. Each teaser is linked, in the admin, to the full News display module, so that the full information can be viewed.
News Teasers (homepage)	To display News teasers in Home Page
News (Ticker)	To display an animated ticker for News, typically built with javascript to scroll from one News teaser to another in a small area of screen space.
Online Polls	To display an Online Poll questionnaire. The website visitor can choose between a few pre-determined options to answer a question, and on submitting the poll, it will be replaced with a description of the current results of the poll, compiled from the entries so far from all entrants.
PortalMaster Discussion Forums	To display forum
Related Links	To display a list of “related links” These links will typically link to external websites, and are determined by editing the Links on a particular page.
Search	To display a Simple Keyword Search field and submit button. On submitting, the page is refreshed, displaying search results, and the option to choose an advanced search.
See Also Links	To display a list of “See Also links” These links will typically link to other pages or documents within the current website (as opposed to Related links which is for external website links), and are determined by editing the Links on a particular page.
Sitemap	To display a text list-based Sitemap; also described as “Sitemap (Full)” which lists all the publicly available pages of the current website.
Weather Display	To display a graphical representation of the weather forecast for the following week. There is an option to display today’s weather in more detail above the weekly forecast.
Login	
Login IP	To include Login function to public site; includes IP described as “User Registration”
Miscellaneous	
NULL	This is an empty Default value (no value), and is intended as an alternative to assigning any of the other modules into a template section.
Shopping Catalogue	
Catalogue	Inserts the Product Catalogue
Navigation	
Introduction	To display Description and Description Graphic of the current Tier (also described as “Tier Element Description”)
Tier Element Description	To display description of the current tier (also described as “Introduction”)
Tier Content	Displays Inline Content Items assigned to the current Tier.
Tier Title	To display the page title (previously known as tier title)
Tier Title with Breadcrumb	As above, but also with “breadcrumb” showing the users current position within the website IA. e.g. Home > Subpage > sub-subpage
Custom Navigation/Style IP Types	Customised to each site