



dotCMS Administrator Manual

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INTRODUCTION

This manual is for those individuals within an organization who have been designated CMS Administrators. As a CMS Administrator, you will have access to functionality that CMS Users do not. This manual outlines that functionality; how it works, and when and how to use it. This manual is to be used in conjunction with the CMS Users Manual, which outlines all basic CMS functionality.

Home Tab

The Home Tab is the page viewed by a CMS User upon logging into the CMS. It can be configured to show any number of portlets. Dotmarketing recommends using this page to show the Workflow Task Portlet, and My Account Portlet so that users can see their tasks and access their account information easily and quickly.

For instruction on how to add Portlets to a page, please see the section "Admin Portlet – Portlets."

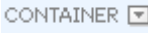
Website Tab (Admin Tasks Only)

Containers

Templates are made up of Containers. Containers are placeholders for the various pieces of content that make up the template—everything from the header and footer, to menu bars/navigation, images, to body content. Not only do containers hold the information, but they also determine how the content will be displayed when it is placed within them.

Editing Containers

Administering Containers will be handled through the File Browser in the Content Management System portlet.

1. The Administrator must navigate to the desired page, and click on the page to enter the Page View.
2. When in Edit Mode, the Container icon  will be available. Clicking on the icon will display the Container Context Menu.

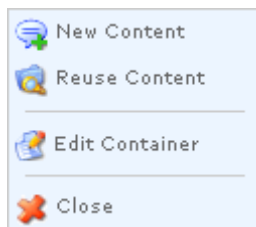


Figure 1: Context Menu

3. Selecting "Edit Container" will direct the User to the "Add/Edit Container" portlet.
4. This portlet will allow the Administrator to adjust the Content Structure and Fields within the Structure to be displayed within the Container.
5. The Information in the portlet is displayed as follows:
 - a. **Identity:** This number will be used when creating and editing Templates in the CMS. The number is assigned automatically and is unique to every Container
 - b. **Host:** The host to which this Container is assigned
 - c. **Title:** Title given to the Container by the user.
 - d. **Description:** A short description of the Container. This is displayed only on the back end.
 - e. **Max. Content:** The maximum number of pieces of Content that a user can place in a Container.
 - f. **Content's Structure:** Determines the Structure that will be allowed to be used in this Container
 - g. **Pre-Loop:** This field will contain the HTML used when the Container is parsed. This field will only be processed once, i.e. opening an HTML tag that will stipulate how the content will be formatted within the Container - `<div class="[ClassName]">`
 - h. **Code:** The Code entered in this field will be processed for each piece of Content added to the Container (determined by the "Max. Content" field).
 - The fields within a Structure will be utilized according to the variables used here.
 - Each variable represents a Field in a Content Structure.
 - To select a variable from a list of available Fields from the Structure, click "add variable" located to the right of the text area.
 - This will pop a new window with all the Fields that make up the Structure that will be used in the designated Container.

Content Inode	
<input type="button" value="add"/>	Content Inode Value
Headline Text Field	
<input type="button" value="add"/>	Current Value
<input type="button" value="add"/>	Text Field Code
Short Summary Text Area	
<input type="button" value="add"/>	Current Value

- Clicking “Add | Current Value” under the desired Field Label will add a variable for that Field to the Code field and close the popup window.
- The steps can be repeated to add more fields.
- i. **Post-Loop:** Much like the Pre-Loop, it is processed after the Code field and only once when the Container is processed. Can be used to close the Container, i.e. `</div>`

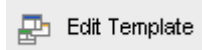
Clicking “Save and Publish” will store all changes and publish the Container for use on the front end.

Templates

Templates are the various layouts available to you for your website’s HTML pages. These layouts contain non page-specific information, so they are essentially empty structures that you can populate.

Administering Templates will be handled through the File Browser in the Content Management System portlet.

1. First, navigate to the desired page and click on the page to enter the Page View.
2. On the Page View Toolbar, click “Edit Template.”



3. This will direct the Administrator to the “Add/Edit Template.”
4. The information in the portlet is displayed as follows:
 - a. **Identity:** the unique identifier for the Template
 - b. **Host:** the Host to which the Template applies
 - c. **Title:** Title of the Template used on the dot CMS back end to uniquely identify them.

- d. **Description:** A short description of the Template. This is displayed only on the back end.
 - e. **Screen Capture / Image:** The image that will be displayed when selecting a Template when creating an HTML Page. The Administrator can Browse for an existing image on the CMS or can choose to upload a new image. Clicking "X" will remove the image.
 - f. **Template:** In this field, the Administrator will enter the HTML code that will determine how the page will be displayed in a web browser.
5. The HTML will be created around the Variables used to display Containers.
 6. To add a Container, click "add container." This will pop a new window allowing the user to browse for an existing Container already on the CMS.
 7. To add Javascript or Cascading Style Sheet links, click "add js/css." A window will pop up allowing the Administrator to browse the CMS for uploaded Javascript and Cascading Style Sheet files.
 8. Clicking "Save and Publish" will store all changes and publish the Template for use on the front end.

Content Tab

There are no "administrator only" tasks in the Content Tab of the CMS. Please refer to the Users Manual for instructions on how to use this area of the CMS.

Creating Forms

Creating an email form within the dotCMS platform, all the HTML for the form must be in the Body field of a Content Structure. All names are case sensitive.

In order for the form to process and correctly send the follow objects must be in the "form" tag:

1. `<form name="contactForm" method="post" action="/dotCMS/sendEmail" onsubmit="return checkForm()">`
 - a. **name="(insert name)"**
Identifies the unique form
 - b. **method="post"**
Identifies the method of submittal on the dotCMS
 - c. **action="/dotCMS/sendEmail"**
The action called that actually processes the form submittal
 - d. **onsubmit="return checkForm()"**
The JavaScript action that verifies all field requirements are met.

Required Hidden Fields

The action performed by the CMS will require the following hidden fields. Any email address entered in the hidden form fields can be protected from Spam applications by adding "spamx" within the email address, i.e. ...value="testspamx@example.com. The "spamx" phrase will be removed when the form is processed. This feature, however, is not required for the form to maintain functionality. In the HTML provided below, the text in CAPS is what you will replace with the accurate information.

1. **from**
 - a. The email sent by the CMS will be from this email address. Replies to the email will also go to this address.
 - b. `<input type="hidden" name="from" id="from" value="EMAIL">`

2. **order**
 - a. Determines the order in which the entered information will be displayed in the email.
 - b. `<input type="hidden" name="order" id="order" value="FIELD NAMES">`

3. **to**
 - a. The email address which will receive the information entered by the form submitter.
 - b. `<input type="hidden" name="to" id="to" value="EMAIL">`

4. **subject**
 - a. The subject of the email received by the address in the "to" field.
 - b. `<input type="hidden" name="subject" id="subject" value="SUBJECT">`

5. **returnUrl**
 - a. The page that the submitter will be sent to after the form is processed.
 - b. `<input type="hidden" name="returnUrl" id="returnUrl" value="URL">`

6. **formType**
 - a. This field will be stored in a database and will then be searchable within a portlet on the CMS. All form results will be displayed with this field as the category. It is also case sensitive; therefore "donations" will be different than "Donations" when it is displayed on the back end.
 - b. `<input type="hidden" name="formType" id="formType" value="FORM TYPE">`

The following hidden fields will also be read by the "sendEmail" action:

1. **cc**
 - a. A carbon copy of the email will be sent to this email address
 - b. `<input type="hidden" name="cc" id="cc" value="EMAIL">`
2. **bcc**
 - a. A blind carbon copy will be sent to this email address
 - b. `<input type="hidden" name="bcc" id="bcc" value="EMAIL">`
3. **html**
 - a. The CMS will send the email in HTML with the information displayed in a table based on the value of this field. If a value of "0" is given, a plain text email will be sent. If a value of "1" is given, the HTML email will be sent.
 - b. `<input type="hidden" name="html" id="html" value="0 OR 1">`
4. **autoReply**

When the form process is completed the user can choose to send a unique message populated with the following fields.

- a. **autoReplyTo**
 - i. This is the email address that will receive the unique message.
 - ii. `<input type="hidden" name=" autoReplyTo" id=" autoReplyTo" value="EMAIL">`
- b. **autoReplyFrom**
 - i. This will be the reply to address for the unique message.
 - ii. `<input type="hidden" name=" autoReplyFrom" id=" autoReplyFrom" value="EMAIL">`
- c. **autoReplySubject**
 - i. This is the subject of the unique message.
 - ii. `<input type="hidden" name=" autoReplySubject" id=" autoReplySubject" value="SUBJECT">`
- d. **autoReplyText**
 - i. This will contain the full body of the email to be sent as part of the form submittal process.
 - ii. `<input type="hidden" name=" autoReplyText" id=" autoReplyText" value="MESSAGE">`

Input Field Names

The following input field names are recognized and stored in a database by field name by dotCMS. Any other field(s) entered as part of the form will be stored as a custom field and separated by pipes within the column.

i.e. - `<input type="text" id="fullname" name="fullname">`

- prefix

- address

- title
- firstName
- middleInitial
- middleName
- lastName
- fullName
- organization
- phone
- address1
- address2
- city
- state
- zip
- country
- email

Validation

In order to validate a form before processing, the following code must be entered. This script tag must be entered in the Content Body to call the appropriate action to validate the form:

```
<script language="JavaScript" type="text/javascript"
src='/global/js/form_validation.js'></script>
```

The following method must also be used in the "form" tag in order to run the validation on submit:

```
onsubmit="return checkForm()"
```

The Validation works based on specific **field** labels.

```
<input type="text" name="LastName" value="" required="text" pretty="Last Name"
requiredLength="9" />
```

1. **required**
 - a. Format validations: text, email, date, number
 - b. Requires the values entered to fit the required style
2. **required="radio"**
 - a. Requires that a radio button or checkbox must be selected
 - b. `<input type="text" name="firstName" value="" required="text" />`
 - c. `<input type="text" name="email" value="" required="email" />`
 - d. `<input type="text" name="DOB" value="" required="date" />`
 - e. `<input type="text" name="IDNumber" value="" required="number" />`
3. **pretty**
 - a. When a required field has not been entered, this value will be displayed in the browser alert.
 - b. `<input type="text" id="email" name="email" pretty="Email Address">`



4. **requiredLength**

- a. designates a required length in characters
 - i.e. Social Security Number, Zip Code, Account Number, etc.
- b. `<input type="text" name="IDNumber" required="number" requiredLength="9" />`

5. **requiredNumber**

- a. Designates the number of checkboxes that must be selected.
- b. `<input type="checkbox" name="fruit" value="Banana" required="radio" requiredNumber="2">`
- c. `<input type="checkbox" name="fruit" value="Apple">`
- d. `<input type="checkbox" name="fruit" value="Orange">`
- e. `<input type="checkbox" name="fruit" value="Mango">`











Structures Tab

Structures

Structures serve to hold and organize information in fields created within dotCMS. The CMS Administrators can use these Structures to specify Content Types to be displayed by Containers. These Content Structures break up information into various fields (Title, Subtitle, Description, Body, etc.) and then display some or all of these fields when it is associated with a page of your website.


Adding/Editing a New Structure































The portlet displayed will show a truncated list of Content Structures and links to: All Structures, New Structure, All Relationships, New Relationship (see **Figure 2**).

Structures			
Action	Structure Name	Description	Categories
 	Buildings	Building Content	Edit
 	Faculty/Student Research	Capstones, collaborative and individual research projects	Edit
 	Clubs and Organizations	clubs	Edit
 	Dining Menu	Daily menus for dining services	Edit
 	Web Page Content (default)	Default CMS Content Structure	Edit

[All Structures](#) | [New Structure](#) | [All Relationships](#) | [New Relationship](#)


Figure 2: Structures Portlet

1. Clicking "All Structures" will take the User to a listing of all Structures (**Figure 3**).
 - a. From this listing, the User can then choose to Edit the fields that make up the Structure by clicking the Edit icon  .
 - b. The User can also view all the Content for any Structure by clicking "VIEW" for the desired list item. This will take them to the Content Search portlet with the selected Structure as the search criteria.
 - c. Clicking "Edit" under the Categories heading, will take the User to the "Edit Entity" portlet. Categories can be assigned and edited through this portlet, but will be explained in further detail under the "Entities" section of this guide. The Categories portlet will be explained further in the "Categories" section

Structures					
Action	Structure Name	Description	Default	Content	Categories
 	Buildings	Building Content		view	Edit
 	Faculty/Student Research	Capstones, collaborative and individual research projects		view	Edit
 	Clubs and Organizations	clubs		view	Edit
 	Dining Menu	Daily menus for dining services		view	Edit
 	Web Page Content	Default CMS Content Structure	Yes	view	Edit
 	Department	Department		view	Edit
 	Distinctively Gettysburg section content	For the Dist. G'burg page in top navigation		view	Edit
 	Sports Game	game or Match information		view	Edit
 	Gettysburg Spotlight	Homepage banners / Distinctive Content		view	Edit
 	Office	Landing page content for offices		view	Edit
 	Majors / Minors	Majors / Minors		view	Edit
 	Press Releases	News Items		view	Edit
 	Promotional Area	Promotional Area		view	Edit
 	Sports News	Sports News		view	Edit
 	Sports Team	Team Information		view	Edit

[add new structure](#)

Figure 3: The Full List of Structures

2. Clicking “New Structure” or editing an existing Structure  will direct the User to the Add/Edit Structures portlet (**Figure 4**).
 - a. The portlet will always default to the “Properties” tab. This tab displays the “Structure Name” and “Structure Description,” which are displayed on the CMS backend and are assigned when creating/editing Containers.
 - b. Users can enable Review tasks to be created at scheduled intervals and be assigned to specified Roles within the Structure.
 - c. When editing an existing Structure, a list of fields will be displayed showing the fields Label, Display Type, DB Column, Required status, Searchable, Viewable in Listing status and Sort Order.

Structures

Properties		Permissions				
Structure Name: <input type="text"/>	Description: <input type="text"/>	Required Fields				
<input checked="" type="radio"/> No Review <input type="radio"/> Enable Review	<input type="button" value="Reset Review in All Contents"/>	Reviewer Role: <input type="text" value="Select a Role"/>				
Review Every: <input type="text" value="1"/> <input type="text" value="Day"/>						
Label	Display Type	DB Column	Required	Searchable	Viewable in Listing	Sort Order
There are no fields to display						
<input type="button" value="Add New Field"/>		<input type="button" value="Reorder Fields"/>				
<input type="button" value="Save Structure"/>			<input type="button" value="Cancel"/>			

About - Disclaimer

Figure 4: Add/Edit Structures Portlet

- d. The "Add/Edit Field" portlet displays the following information per field:
- i. **Label:** the name given to the field within the Content Structure
 - ii. **Display Type:** Determines how a field displays in HTML on the "Add New Content" form, i.e. Text, Radio button, WYSIWYG, Select Drop Down, Text Area, etc.
 - iii. **Data Type:** determines the data type that will be entered into a field: Boolean (yes/no), Date, Decimal, Integer, Text, Long Text
 - iv. **Values:** Information entered here will be the values the User will be able to select from when adding Content in this field. It is only used for drop down list, radio buttons, checkbox, select boxes or multiselect boxes.
 - v. **Validation:** Validation placed on any field will designate the characters and/or format of the data allowed in the field, i.e. email address, numbers, no HTML. Administrators can write their own regular expressions if needed for special validations.
 - vi. **Hint:** Displayed to the User as reminder as to what content will be allowed in the field or where the entered data will be used, i.e. example data or a detail page
 - vii. **Default Value:** The default value assigned to the field before user input.
 - viii. **Required:** when checked, the associated field requires validated data entry.
 - ix. **Searchable:** when checked, the Content Search will use this field in its search.

- x. **Show in Listing:** when checked, the content in this field will be displayed in the Content Search results on the backend.
- e. Clicking "Save Field" will store the new/existing field with the entered information.
- f. Once a Structure contains more than one field, the order can then be changed by numbering the Fields in the "Sort Order" column and clicking "Reorder Fields."
- g. If the User clicks "Delete Structure and Content", the Structure will be removed from the CMS. **NOTE: ALL CONTENT ENTERED USING DELETED STRUCTURE WILL BE DELETED FROM THE CMS.**


Relationships

1. A Content Structure can also be assigned a Relationship. A relationship will designate one structure as a parent/child of another structure. For example: Relating a sports news story to a sports team so that that news story appears in that team's section.
2. Clicking "View All Relationships" will take the User to the "Structures Relationships" portlet (**Figure 5**). The portlet displays a listing of all Relationships

Structures Relationships						
Action	Relationship Name	Parent Structure	Child Structure	Cardinality	Parent Required	Child Required
 	Majors-Departments	Majors / Minors	Department	1-N	No	No
 	Matches-Team	Sports Game	Sports Team	M-N	No	Yes
 	Major-Research	Majors / Minors	Faculty/Student Research	M-N	No	No
 	Team-News_Item	Sports Team	Sports News	1-N	No	No
 	Sports_Game-Preview	Sports Game	Sports News	1-N	No	No
 	Team-Sport_Specific_Promo	Sports Team	Promotional Area	1-N	No	No
 	Sports_Game-Recap	Sports Game	Sports News	1-N	No	No

[add new relationship](#)

Figure 5: Structures Relationship Portal (Full Listing)

3. This listing displays:
 - a. Relationship Name
 - b. Parent and Child Structures in the Relationship
 - c. Cardinality and the Parent and Child Requirements.
4. The User can choose to edit an existing Relationship by clicking the Edit Icon  , or create a new Relationship by clicking "Add New Relationship." The User will then be directed to the "Add/Edit Relationship" portlet (**Figure 6**).

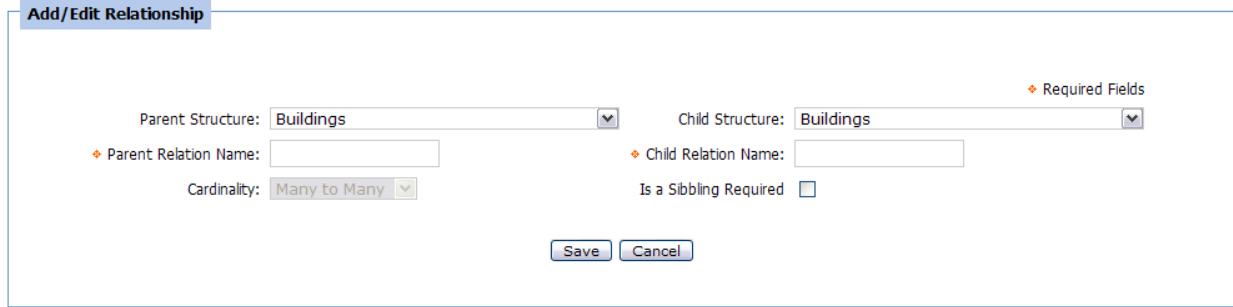


Figure 6: Add/Edit Relationship Portlet

5. The portlet will allow the user to:
 - a. Designate Parent and Child by Structure
 - b. Set Cardinality (One to Many, Many to Many)
 - c. Declare whether a Parent or Child is a requirement

Categories

1. Categories are created and used to classify pieces of content. Your website's users can then search for content by filtering them by category.
2. Categories are arranged in a Parent/Child structure where a Top Level Category can have many Child Categories. In turn, these Child Categories can be Parents to a sub level of Child Categories and so on.
3. The main Categories portlet will display a list of all Top Level Categories to the User.

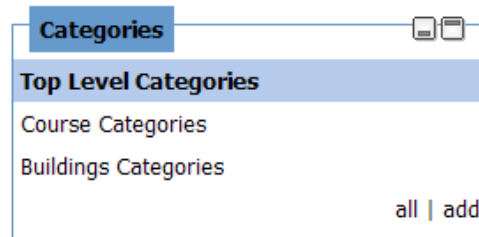


Figure 7: Categories portlet as seen in the left hand column of the CMS tab

4. The User can click "Add" to create new Categories directly from this portlet or click "All" to be directed to the "View Categories" portlet (**Figure 8**).
 - a. The default view will show all Top Level Categories
 - b. Clicking on a Category will move to the next tier in the Category tree structure. If no sub-levels exist for a Child Category, "No Children" will be displayed.

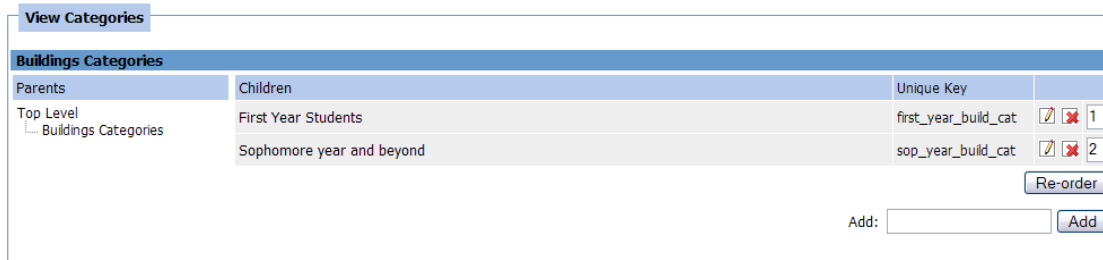


Figure 8: "All" Categories

- From the main portlet, the User can add a Top Level Category by clicking "Add." This will direct the User to the "Add/Edit Category" portlet.

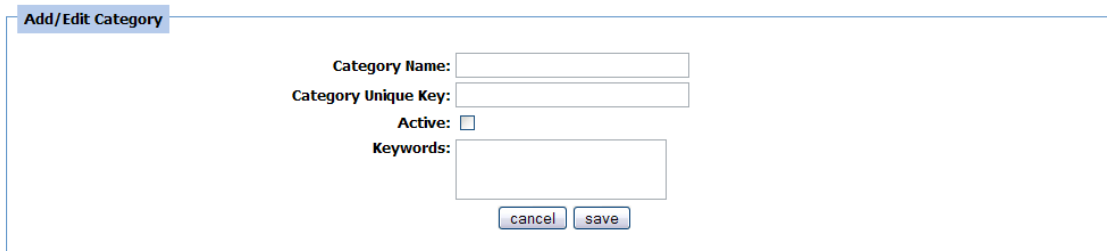



Figure 9: Add/Edit Category Screen

- The User will be able to add the following information: Category Name, Category Unique Key, set Active status and assign Keywords.
- To add a Child to a Parent Category, click on the Category to display its sub-level. Type the Category Name in the "Add:" field at the bottom right of the portlet and click "Add."
- This will add the Category to the list. To edit, click the Edit icon .

Entities

- When a Structure is created, it is added to the list of Entities in the dotCMS platform.
- These Entities can now be assigned Categories.
 - All Categories assigned to an Entity will be available for Content created under the corresponding Structure.
 - When selecting Categories, selecting the Parent will automatically add the Child Categories.
 - Selecting both a Parent and a Child from the list will cause duplicate listings.
- The main portlet under the Data Structure tab will display a truncated list of Entities in the CMS. Click "All" to be directed to the "View All Entities" portlet.

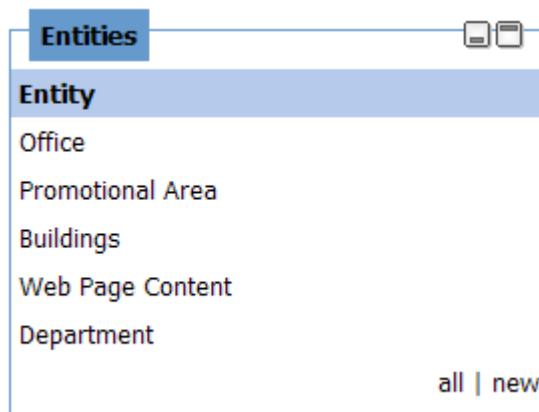


Figure 10: Entities Portlet as seen on the CMS Admin Tab

- The User can now choose from a list of created Entities. To edit, simply click the Name. The user will be directed to the "Edit Entities" portlet

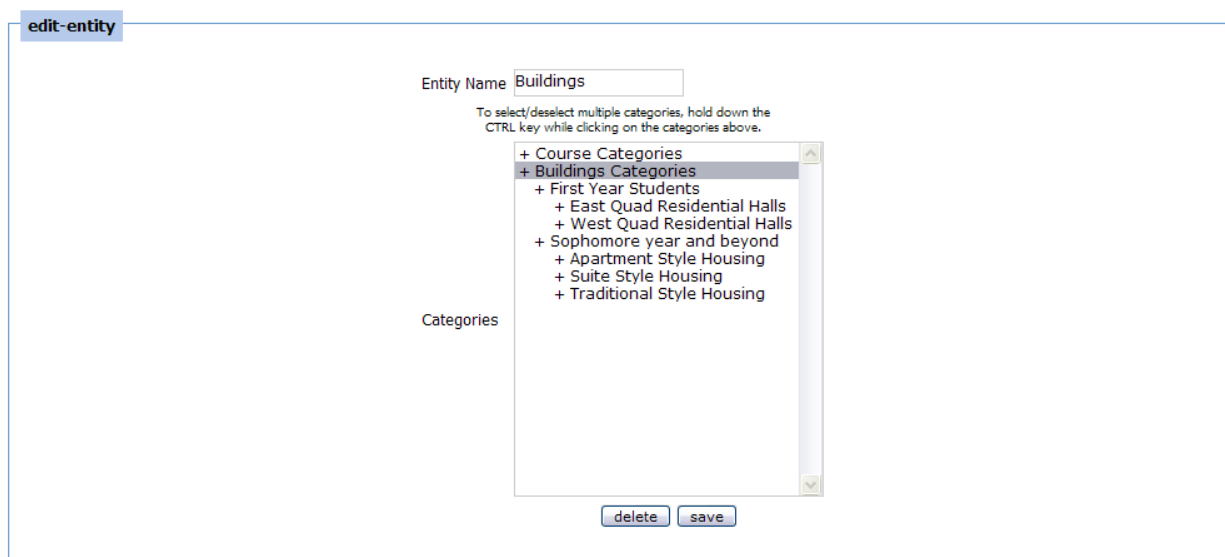


Figure 11: Edit Entities Portlet

- An expanded view of the Category structure will be displayed to the User in a Multiple Select box.
- The User can now select the desired Categories for the specific Entity/Structure. To select/deselect multiple Categories, hold down the CTRL key while making a selection.
- Click "Save" to save the selected Categories to the Entity.

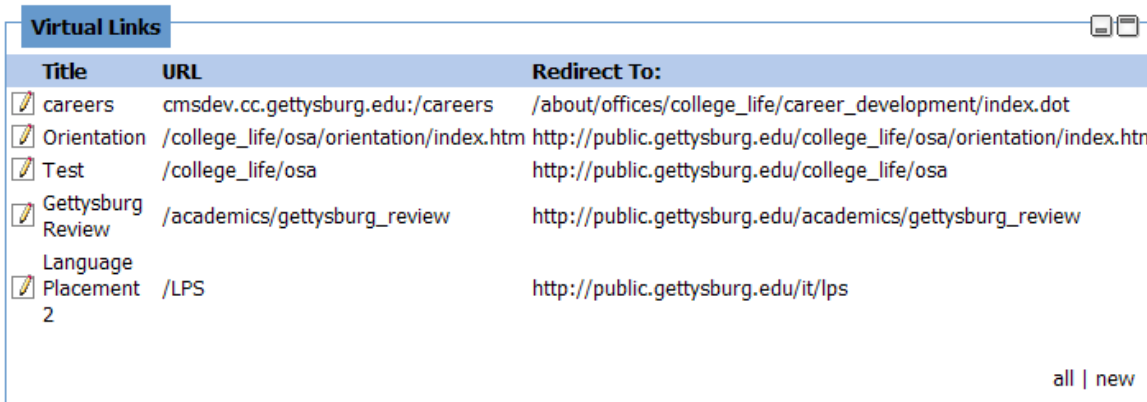
Virtual Links

Virtual Links are extensions to the host URL that redirect the front end user to an HTML page within the CMS. This enables a CMS Administrator to direct front end visitors to

another page in the CMS or to an external link using a shorter URL, i.e. "www.hostname.com/register" will redirect to "/online_registration/online_form.dot"

The CMS requires that at least one Virtual Link be created. The "/cmsHomePage" works to direct any front end visitor to the designated page as the host homepage, i.e. /home/index.dot is designated as the page to be displayed when a visitor enters [host].com.

The main portlet displays a truncated list of Virtual Links in the CMS. Click "All" to view the full listing of Virtual Links.

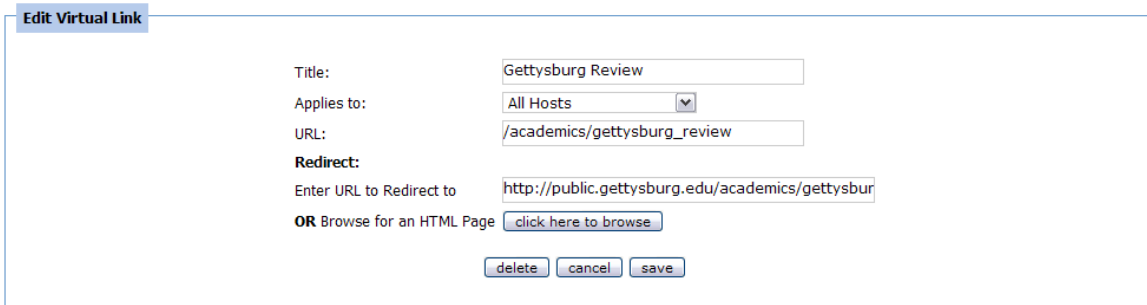


Title	URL	Redirect To:
<input checked="" type="checkbox"/> careers	cmsdev.cc.gettysburg.edu:/careers	/about/offices/college_life/career_development/index.dot
<input checked="" type="checkbox"/> Orientation	/college_life/osa/orientation/index.htm	http://public.gettysburg.edu/college_life/osa/orientation/index.htm
<input checked="" type="checkbox"/> Test	/college_life/osa	http://public.gettysburg.edu/college_life/osa
<input checked="" type="checkbox"/> Gettysburg Review	/academics/gettysburg_review	http://public.gettysburg.edu/academics/gettysburg_review
<input checked="" type="checkbox"/> Placement 2	/LPS	http://public.gettysburg.edu/it/lps

all | new

Figure 12: Virtual Links Portlet as seen on the CMS Admin Tab

1. Clicking the Title of an existing Virtual Link or "Add New Virtual Link" will direct the User to the "Edit Virtual Link" portlet.



Edit Virtual Link

Title:

Applies to:

URL:

Redirect:

Enter URL to Redirect to:

OR Browse for an HTML Page

Figure 13: Edit Virtual Link Portlet

2. In this portlet, the User can provide the following information:
 - a. **Title:** Name given to Virtual Link
 - b. **Applies To:** The host to which this Virtual Link will apply
 - c. **URL:** The extension to the host URL that will be entered into the visitor's browser
 - d. **Redirect:** The User may either enter the path to the desired page or click Browse to search the CMS for the desired page.

3. Changes must be saved by clicking "Save"
4. When editing an existing Virtual Link, clicking "Delete" will remove the Virtual Link from the CMS.

Languages

The CMS has the capability to hold content in more than one language. In order to use this feature, the content must be entered in the other language (it does not translate content). Then content can be assigned a language and dotCMS will display the proper content according to the language selected by the user.

Global Variables

Global variables can be used to easily maintain and update small pieces of content that may change regularly and/or be used in several places throughout the website. For example, tuition and fees may be used in several places throughout the website. Instead of having to use the same contentlet each time you want to reference the tuition, you can use the variable for tuition in each contentlet in which it is referenced. This way, when the figure changes, you only have to update the variable in the Global Variables portlet for it to populate throughout the website.

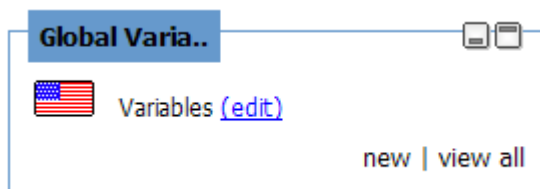
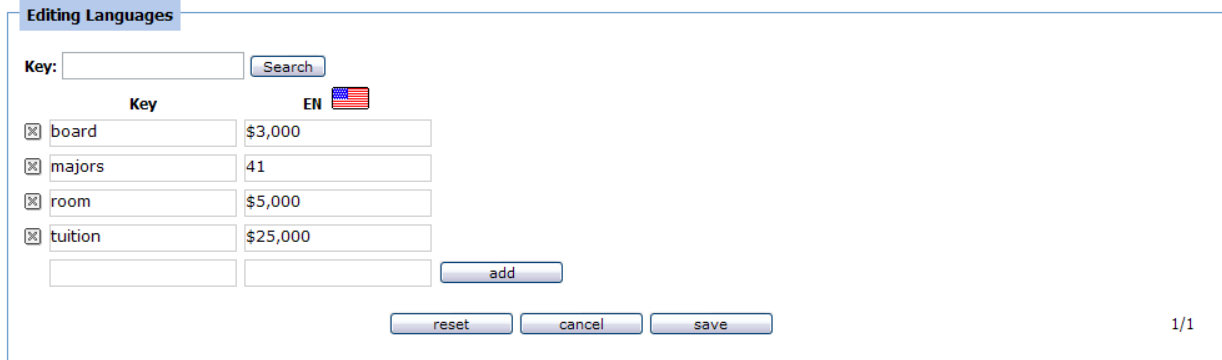


Figure 14: Global Variables Portlet as seen on the CMS Admin Tab

1. To use the global variable in the content, users have to enter the following:
 - a. `$globalvars.get('varname')` into the content and the correct information will be displayed in its place.
2. To add a new variable, simply:
 - a. to the Global Variables portlet in the CMS Admin tab
 - b. Click on "Variables"



The screenshot shows a web interface titled "Editing Languages". At the top, there is a "Key:" search field with a "Search" button. Below this is a table with two columns: "Key" and "EN". The "EN" column has a small US flag icon. The table contains the following entries:

Key	EN
board	\$3,000
majors	41
room	\$5,000
tuition	\$25,000
<input type="text"/>	<input type="text"/>

Below the table is an "add" button. At the bottom of the interface are "reset", "cancel", and "save" buttons. The page number "1/1" is visible in the bottom right corner.

Figure 15: Updating Global Variables

- c. In the "Key" field, add the variable name (ex: tuition)
 - d. In the "EN" field, add the figure, word, etc. you'd like to appear in place of the variable
 - e. Click on "Add"
3. Once these steps have been completed, the variable text/figure will appear in place of the variable macro (`$globalvars.get('varname')`) throughout the website.

Events

A User with Events User permissions will have access to the Events Page. This page will only contain the Events portlet. An Events User will only be able to view the Events Calendar listing and the details for the Events they have created.

A User with Events Administrator permissions will have access to the Events Administrator Page. This page will contain the Events portlet, the Events Approval portlet and the Facilities Manager portlet. The Events Administrator will have access to the Calendar and View/Edit permissions for every Event entered in the CMS. Being a CMS Administrator does not automatically make you an Events Administrator. This is a separate role.

When in the Events tab in the CMS you will be able to search by a number of parameters to find the event you're looking for, or you can display all events.



To search for an Event

1. Go to the Event tab in the CMS.
2. You will see a few different drop down menus that you can use to filter events that have already been entered into the CMS.
3. Once you have selected your parameters, click "Show Events."
4. Your search results will appear on the same page, below the search criteria. Events listed in blue are events which are pending approval. Events in red are events which were not approved.



Figure 16: Events Portlet as seen on the Events Tab

To see all Events

1. Go to the Events tab in the CMS.
2. Click on the "all" link to go to the "View Events" portlet.
3. The current month's Events will be displayed.
4. To view other months, click the single arrow icon to view the next/previous month . To view the next/previous year, click the double arrow icon .
5. Events listed in blue are events which are pending approval. Events in red are events which were not approved.



Event	Show on Web Calendar	Registrations	Facility	Date and Time
Sat, July 1 2006				
Freshman Orientation	Yes	No	None / Off-Campus	7/1/2006 10:30 AM
Sun, July 2 2006				
Freshman Orientation	Yes	No	None / Off-Campus	7/2/2006 10:30 AM
Mon, July 3 2006				
Softball against Liquid Matrix	Yes	No	None / Off-Campus	7/3/2006 5:20 PM
Freshman Orientation	Yes	No	None / Off-Campus	7/3/2006 10:30 AM
Keystone Events Presentation	Yes	Yes - (0)	None / Off-Campus	7/3/2006 2:40 PM
Tue, July 4 2006				
Freshman Orientation	Yes	No	None / Off-Campus	7/4/2006 10:30 AM

Figure 17: View Events Portlet

To view Event details

1. Once you have found the event you're looking for, either by using the search functionality or by listing all, you will be able to click on the name of the event to view the details.
2. If you click on an event that you entered, you will see the Add/Edit Event screen (**Figure 18**).
3. This will allow you to make any adjustments that are necessary.

4. For Event Users, if you click on an event that you did not enter, you will see a non-editable screen with the event details.
5. Event Administrators will have access to view and edit all entered events.

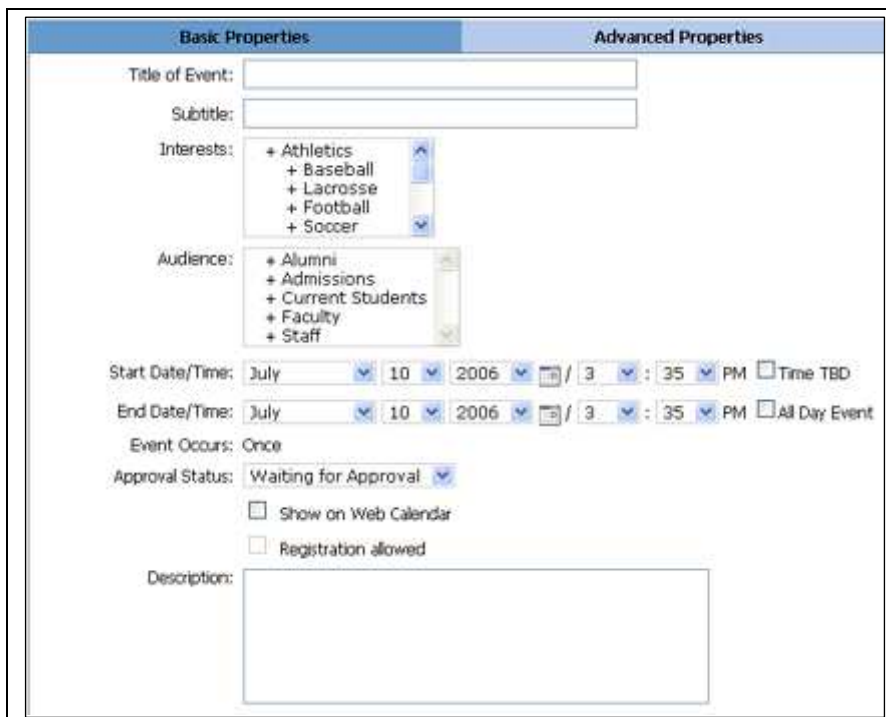


Figure 18: Add/Edit Events Portlet

Adding a New Event

1. In the CMS select the Events Tab.
2. Click "Create New Event."
3. This will take you to the Add/Edit Event Page.

The Basic Properties Tab contains the following fields:

1. The event **Title** is the public-facing name of the event.
2. The event **Subtitle** is for any additional part of the event title.
For Example: Title: "Open House," Subtitle: "President's Day Visitation"
3. **Audience** indicate the audience, and thereby the type of calendar, for whom the event is intended.
 - a. To display an event to all audiences, click on the first calendar type, scroll to the bottom of the list, and hold down the shift key while clicking on the last event type available.
4. **Start Date/Time** indicates when the actual event is beginning.

- a. Select the date and time at which the event will begin from the drop down menu.
 - b. If it is an all day event, select the box labeled "All Day Event."
 - c. If the event time is still not determined, select the box labeled "Time TBD."
5. **End Date/Time** indicates when the actual event is scheduled to end.
 - a. Select the date and time at which the event will end from the drop down menu.
6. **Event Occurs** is where you can identify whether an event occurs once or is a recurring event.
 - a. An event must be saved before making it a recurring event.
 - b. If a recurring event is being scheduled, after saving it, click on "Once" and change it to recur daily, weekly, monthly, etc.
7. **Show on Web Calendar**
 - a. Selecting this box allows the event to be displayed in the Front End Web Calendar once it has been approved by an Events Administrator.
8. **Calendar types** will indicate where on the site the event is displayed. For example, the event may be an athletic event, an admissions event, etc.
 - a. To select multiple calendar types, hold down the ctrl key while clicking to select.
 - b. To display an event in all calendars, click on the first event type, scroll to the bottom of the list, and hold down the shift key while clicking on the last event type available.
9. **Description** is a forward-facing field, where any additional information about the event should be added.
 - b. Any contact information for display on the front end should be included in the description.
10. **Contact Information** is that for the internal contact for the event. As much information as possible should be provided in these fields.

The Advanced Properties Tab contains the following fields:

1. **Facility** indicates the location of the event.
 - a. Select the facility where the event will take place in from the drop down menu.
2. **Web Address** is an area where you can provide a separate web address for the event if there is one.
3. **Setup Date/Time** allows you to block off some time before the event to set up.
 - a. The setup date and time can be before the start time of the event or the same as the start time of the event.
 - b. Select the setup date and time from the drop down menu.

4. **Break Date/Time** allows you to block off some time after the event to break down and clean up if necessary.
 - a. The break date and time can be after the event ends or the same as the end date and time of the event.
 - b. Select the break date and time from the drop down menu.
5. The **Comments/Equipment** field provides an opportunity for the event organizer to make any special requests for equipment or other comments.
 - a. Anything placed in this field is internal and will not be seen by those viewing the event on the front end.
6. **Directions** is a forward-facing field, where the directions to and location of the event should be added.
7. **File Attachment**
 - a. If a file needs to be attached, such as a flyer, it needs to be saved to the CMS before it is uploaded in this section.
 - b. To upload a file, select the "Browse for File" button on the bottom right of the screen.
 - c. A new window will open. Find the file that you would like to upload by selecting it from the folder it resides in.
 - d. Once you have selected the file you will be redirected back to the Add/Edit Event Page, and the file will be listed.
8. **Save/Cancel**
 - a. "Save" will alert the Event Administrators that a new event request has been submitted for approval. An email confirming the request will be sent to the Event Administrators and the user making the request.
 - b. "Cancel" will not submit the event request and all information entered will be lost.

Events Approval

1. The main portlet displays a truncated list of events pending approval.
2. Clicking "View All" directs the User to the "Events to Approve" portlet.
3. The Events Approval listing displays the following:
 - a. Event Title
 - b. Requested by (User who created the event)
 - c. Approve and Disapprove actions
 - d. Conflicts (if any)



Event Title	Requested By	Approve	Disapp	Conflict
Alumni Weekend	Jason A Smith	Approve	Disapprove	None

view all | view calendar

Figure 19: Event Approval Portlet

4. To view the Event Details, click the Event Title. This will direct the Events Administrator to the Add/Edit Events portlet.
5. If an Event meets approval, the Events Administrator can click "Approve" to add it to the Events Calendar. This will remove the event from the "Events to Approve" portlet and add it to the Events Calendar.
6. Only approved Events will reflect conflicts.
7. Events that have been disapproved can be edited and, when saved, they will be automatically resubmitted for Events Administrator approval.
8. Events administrators can also view registrations for events, if allowed, by clicking "Show(?)" on the View Events portlet. (? – represents the number of registrants for the Event)

Facilities Manager

1. Facilities are locations to which events can be assigned.
2. Clicking "View Facilities" will show you all created facilities.
3. You can add a new Facility directly from this portlet by clicking "Add New Facility."
4. When Adding/Editing a Facility, the User will be allowed to enter the Facility Name, a Description, Sort Order, and whether or not the Facility is currently active.\
5. Remember to click "Save" to record all changes.
6. To delete a Facility, select it by clicking the checkbox(es) and clicking "delete selected facilities."

CMS Admin Tab

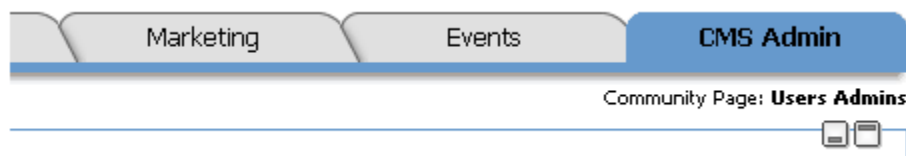


Figure 20: The CMS Admin Page

Admin Portlet

The Admin Portlet consists of links to manage the following:

- Company Information
- Portlets
- Users
- Groups
- Roles

Each will be discussed in detail throughout this section.

Company Information

This is where all basic institutional information is saved, including address, logo, url, phone number, fax number, etc.

Company Profile


<p>Basic Information</p> <p>Name <input type="text" value="dotcms.org"/></p> <p>Short Name <input type="text" value="dotcms.org"/></p> <p>Type <input type="text" value="Business"/></p> <p>Size <input type="text" value="100"/></p> <p>Portal URL <input type="text" value="demo.edudm.com"/></p> <p>Home URL <input type="text" value="demo.edudm.com"/></p> <p>Mail Domain <input type="text" value="localhost"/></p> <p>Primary Address</p> <p>Street <input type="text" value="2424 S. Dixie Hwy."/></p> <p>City <input type="text" value="Miami"/></p> <p>State <input type="text" value="FL"/></p> <p>Zip <input type="text" value="33133"/></p>	<p>Logo</p> <div style="text-align: center;">  <p>change</p> </div> <p>Colors <input type="text" value="Classic"/></p> <p>Dotted Lines <input type="text" value="No"/></p> <p>Resolution <input type="text" value="1024 by 768 pixels"/></p> <p>Rounded Edges <input type="text" value="No"/></p> <p>Primary Contact</p> <p>Phone Number <input type="text" value="(305) 858-1422"/></p> <p>Fax Number <input type="text"/></p> <p>Email Address <input type="text" value="support@dotcms.org"/></p>
--	--

Figure 21: Company Information

Portlets

Overview

Portlets are features that are present on certain pages within the CMS. Portlets give access to different functions of the CMS to users based on either their association with certain a role or a certain group.

Associating portlets with roles from the "Portlets" page

1. In order to associate portlets with certain roles, a CMS admin needs to click on the "Portlets" link from the CMS Admin page.
2. Once redirected to the "Portlets" page, the CMS admin can see a list of all of the available portlets under the "Portlet Name" column.
3. The "Edit" column allows for a CMS admin to change what roles have access to a specific portlet.
4. The "Required Role" column lists the roles required for a user or group to have in order to have access to each portlet.

Portlet Name	Edit	Status	Indexed	Required Roles
Address Book	Edit	Active	False	Power User, User
Admin	Edit	Active	False	Administrator
Amazon Rankings	Edit	Active	False	Power User, User

Figure 22: The Portlets Page

- To edit the role associated with a certain portlet, the CMS Admin needs to select the "Edit" link next to the appropriate portlet name.
- Once redirected to that portlet's edit page, the CMS admin will see different setting options for that specific portlet.
- Under the "Role" section of the page, the CMS admin will be able to add roles that have access to that portlet by selecting roles from the "Available" column and moving them over to the "Current" column by selecting one or more roles and clicking the arrow button pointing left. Furthermore, to remove a role from having access to a certain portlet, the CMS admin needs to select one or more roles from the "Current" column and transfer it/them back to the "Available" column by pressing the arrow button pointing right.

Figure 23: Associating Portlets with Roles

- The "Width" drop-down menu allows for a CMS admin to determine what type of column this portlet will be associated with. By selecting "Wide", this portlet will only be featured in a wide column, whereas by selecting "Narrow" this portlet will only feature in a narrow column.
- The "Status" drop-down menu allows a CMS admin to decide what portlets are available for use in the CMS. When set to inactive, that portlet will not be available for association with roles and therefore will not figure anywhere inside the CMS.
- Once all edits to that portlet has been made, the CMS admin needs to press the "Update" button at the bottom of the page.

User

Creating a user

- A CMS Admin can create a user account from the "Users" link on the Admin page.

A large, stylized graphic of the letters 'Ad' in a bold, black, blocky font. The letters are positioned on a blue background that is part of a larger graphic design. To the left of the 'Ad' is a white rectangular area, and a blue horizontal line extends from the left edge of the white area towards the 'Ad'.

Figure 24: Creating a User

- The CMS admin will then be redirected to the “Users” page.

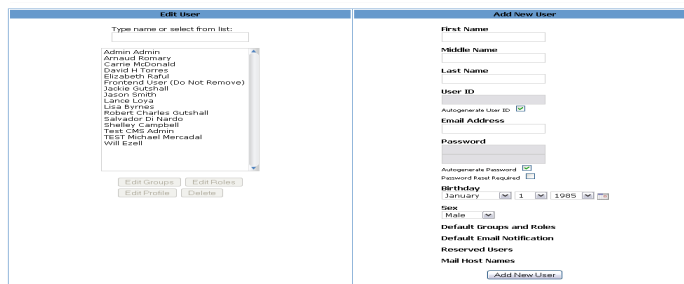


Figure 25: The Users Page

- In the “Add User” column, the name, middle name, and last name of the user need to be populated in the appropriate fields.
- The “User ID” field gives the CMS admin the option of letting the CMS auto generate a User ID or choosing a custom User ID.
 - It is recommended to leave the “Auto-generate User ID” checked.
 - This User ID will not be used by this user to log into the CMS, the login will be the email address entered.
 - The same options apply to that user’s password.
- By pressing the “Add New User” button at the bottom of the page, the user will be created, and will be able to log into the CMS using the email address and password entered.
- To confirm the addition of a user, the CMS admin can look in the “Edit User” column and see if the new user is listed.

Note: A user will need to be associated with at least one group before he/she is able to log into the CMS (see Groups: Editing the users part of a group from the Groups page)

Assigning groups to a user from the “Users” page

- Once a user has been created, this user needs to be given a certain amount of privileges, which will dictate what he/she has access to.
- This is achieved by associating this user with one or several groups (for more information on groups refer to the “Admin Portlet: Groups” section of this manual).
- In the “Edit User” column, the CMS admin needs to click on the user’s first and last name, and then click on the “Edit Groups” button. This will redirect the CMS admin to the “Edit Groups for User” page.

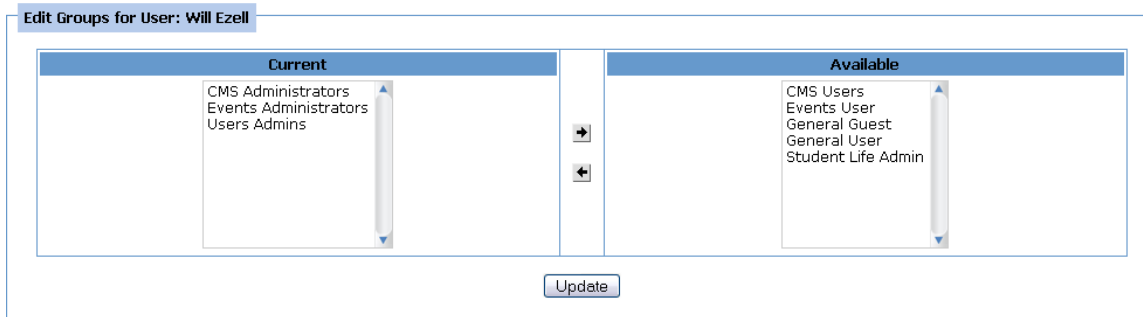


Figure 26: The Edit Group Page

4. The "Edit Groups for User" page is divided into two columns. The "Current" column lists the groups which this user is part of, while the "Available" column lists all of the groups that are available but not yet associated with that user.
5. In order to associate a user with a certain group, the CMS admin will select one or more groups from the "Available" column, and will add those to the "Current" column by pressing the arrow button pointing to the left (see the Edit Group Page).
6. Once the changes have been made, the CMS admin needs to press the "Update" button to save the changes.
7. To dissociate a user from a certain group, the above process is reversed, and groups listed in the "Current" column can be transferred back to the "Available" column by selecting them and pressing the arrow that points to the right.

Assigning roles to a user from the "Users" page

Whereas standard access privileges to the CMS are inherited by a user depending on which groups this user belongs to, the roles inherited by this user will mainly define his/her permissions linked to folders and content. (Note: A user first needs to be part of a group to be assigned specific roles.)

1. In order to add roles to a specific user, a CMS admin needs to navigate to the "Users" page from the CMS Admin page.
2. Once on the Users page, a CMS admin must select the user's name from the "Edit User" column and then click on the "Edit Roles" button.
3. The CMS admin will then be redirected to the "Edit Roles" page.

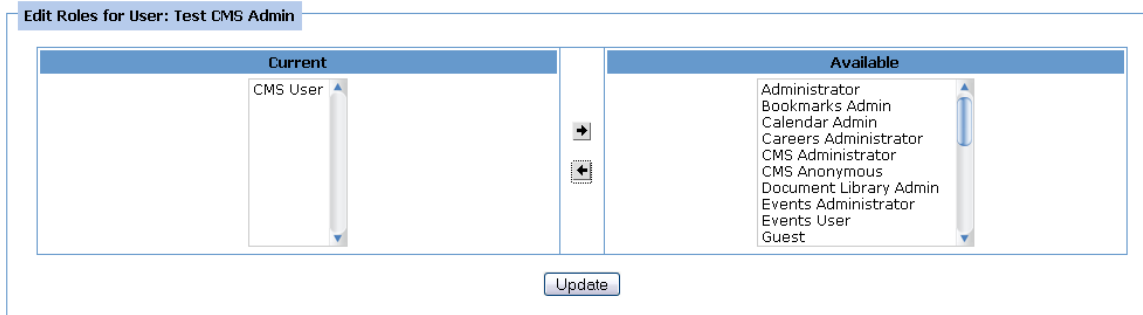
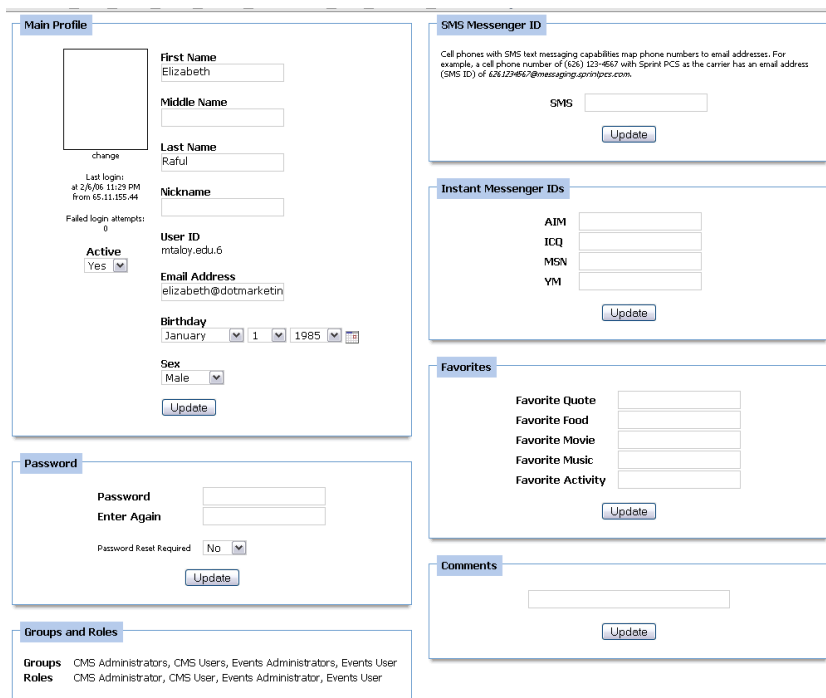


Figure 27: The Edit Roles Page

4. From the "Edit Roles" page, the CMS admin will be able to add roles to this user by selecting certain roles in the "Available" column and click the arrow that points to the left. Similarly, roles can also be removed from a specific user by selecting a role in the "Current" column and pressing the arrow button pointing to the right.
5. Once the changes have been made, the CMS admin needs to press the "Update" button to save the changes.

Editing an existing user's profile

1. A user's profile may be edited by selecting a specific user from the "Edit User" column in the Users page and clicking on the "Edit User" button.
2. Once in the Profile page, the user's information can be edited, and additional personal information such as phone number and address can also be added.



The screenshot shows a user profile page with several sections:

- Main Profile:** Includes fields for First Name (Elizabeth), Middle Name, Last Name (Rafal), Nickname, User ID (mtaloy.edu.6), Email Address (elizabeth@dotmarketing), Birthday (January 1, 1985), Sex (Male), and an Active status (Yes). There is also a "change" link for the profile picture and a "Last login" timestamp.
- Password:** Fields for Password and Enter Again, with a Password Reset Required dropdown set to "No".
- Groups and Roles:** Lists "Groups" (CMS Administrators, CMS Users, Events Administrators, Events User) and "Roles" (CMS Administrator, CMS User, Events Administrator, Events User).
- SMS Messenger ID:** A field for SMS and an "Update" button. A note explains that call phones with SMS capabilities map phone numbers to email addresses.
- Instant Messenger IDs:** Fields for AIM, ICQ, MSN, and YM, with an "Update" button.
- Favorites:** Fields for Favorite Quote, Favorite Food, Favorite Movie, Favorite Music, and Favorite Activity, with an "Update" button.
- Comments:** A text input field and an "Update" button.

Figure 28: The User Profile Page

Groups

Overview

Groups are associations of one or more roles to which users can belong and in turn inherit all of the group's

underlying roles at once. Although a function of groups is to standardize a set of roles to which multiple users belong, groups are mainly used to give access to specific pages and portlets.

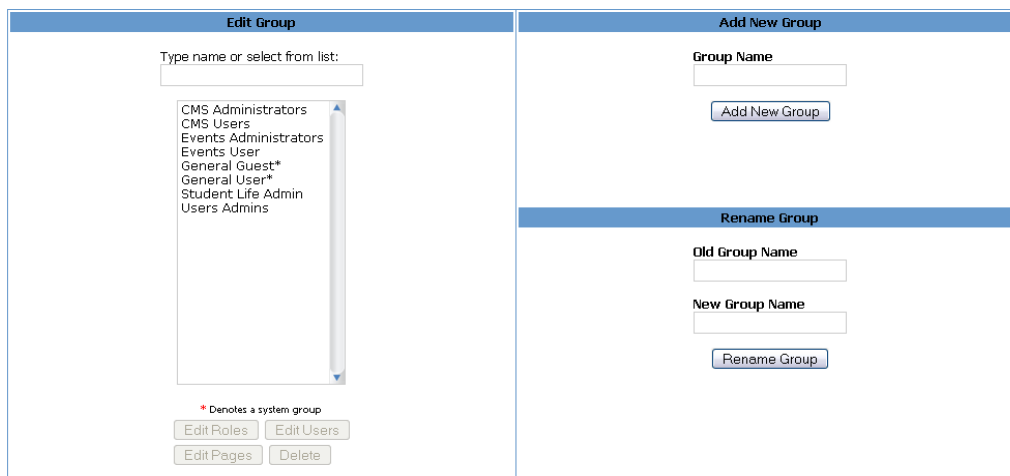


Figure 29: The Groups Page

Creating a group

1. Creating a group will enable a CMS admin to assign a desired number of roles to multiple users at once.
2. In order to create a group, the CMS admin must navigate to the CMS Admin page and click on the "Groups" link.
3. The "Add New Group" section is situated on the right side of the page, and will enable a CMS admin to create a new group by entering its name and clicking the "Add New Group" button.
4. Once added, the new group should be listed in the "Edit Group" list on the left side of the Groups page.

Editing the roles attached to a group from the "Groups" page

1. In order to serve its purpose, a group needs to be assigned a certain number of roles. These roles are selected by the CMS admin and will affect all users that join this group.
2. In order to edit a group's role from the "Groups" page, select a specific group and click on the "Edit Roles" button. A CMS admin could also choose to edit the role of a certain group from the Roles page (see "Editing the groups associated with a role from the "Roles" page).
3. Once redirected to the "Edit Roles" page, the CMS admin can choose from existing roles in the "Available" column and add them to that specific group by clicking on the arrow button pointing left. Similarly, roles can be removed from a certain group by selecting them from the "Current" column and pressing the arrow button pointing right.

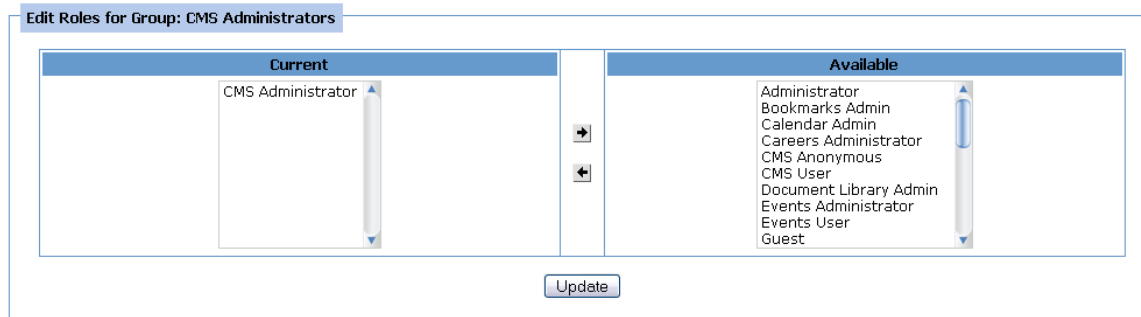


Figure 30: The Edit Roles Page

4. Once the changes have been made, the CMS admin needs to press the “Update” button to save the changes.

Editing the users in a group from the “Groups” page

1. In order to choose which users should be associated with a certain group, a CMS admin would need to navigate to the “Groups” page, select a specific group, and then press the “Edit Users” button.
2. Once redirected to the “Edit Users” page, the CMS admin can choose one or more users in the “Available” column and add them to that specific group by clicking on the arrow button pointing left. Similarly, users can be removed from a certain group by selecting them from the “Current” column and pressing the arrow button pointing right.

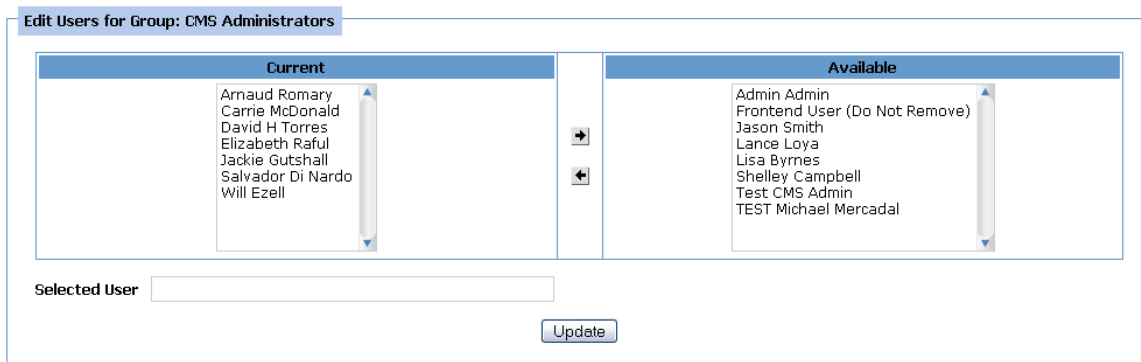


Figure 31: The Edit Users Page

3. Once the changes have been made, the CMS admin needs to press the “Update” button to save the changes.

Editing pages available to a certain group

1. As part of the access privileges that groups offer to users associated with them is the access to specific CMS pages. Whereas groups with the most basic roles will yield

their users very limited access, admin groups will allow its users to have access to a larger number of CMS pages.

2. In order to edit the pages to which specific groups have access, the CMS admin needs to navigate to the "Groups" page from the CMS Admin Page, select a certain group from the Groups page, and click the "Edit Pages" button. You will then be redirected to the "Edit Pages" page.

Content Settings

Selected Page Events

Name Events Set as Default Update Content Settings

(n) signifies narrow portlets and (w) signifies wide portlets

Content

Categories

Community, Development, Entertainment, Finance, Library, News, Polls, Science, Shopping, Test, Tools, Wiki, WSRP, User/Org Management, Content Management

N/A

Please select a category.

Layout

Narrow Column

↑

↓

✕

Move Column ▶

Wide Column

Events

↑

↓

✕

◀ Move Column

One Column / Two Columns / Three Columns Update Content Settings

Figure 32: Edit Pages for Groups

Page Settings

1. The "Page Settings" page allows a CMS admin to choose the order in which pages are shown in the CMS menu when more than one page is associated with a certain group.
2. When more than one page exists, selecting a certain page and pressing the "up" and "down" arrow buttons will cause that page to move up or down in the order in which it is shown.
3. Click "Update Page the Settings" button in order to save the changes that you have made. **Note: Pages on the CMS are shown from left to right. Pages on top in the "Page Display Order" column will be on the left.**

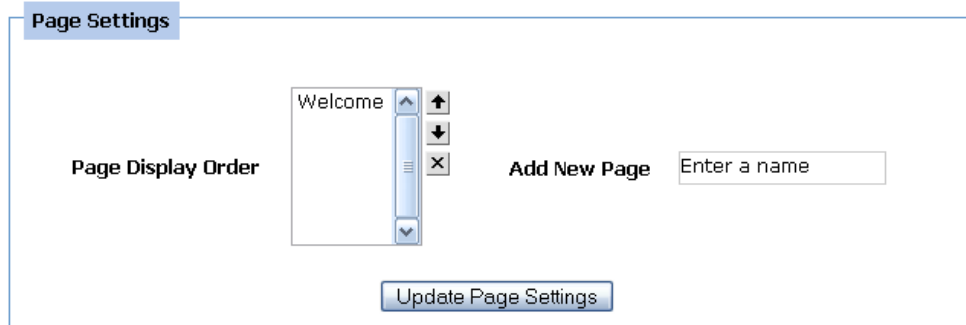


Figure 33: Page Settings



Figure 34: Web Page Ordering

4. Furthermore, it also allows a CMS admin to add new pages viewable by that specific group. To do this, the CMS Administrator must simply add the name of the new page that he/she would like to create in the "Add New Page" field.

Content Settings

The content settings section of the "Edit Pages" page allows for a CMS admin to choose what portlets will be featured on selected pages, as well as how those portlets will be displayed (for more information on portlets, please refer to the "Portlets" section of this guide).

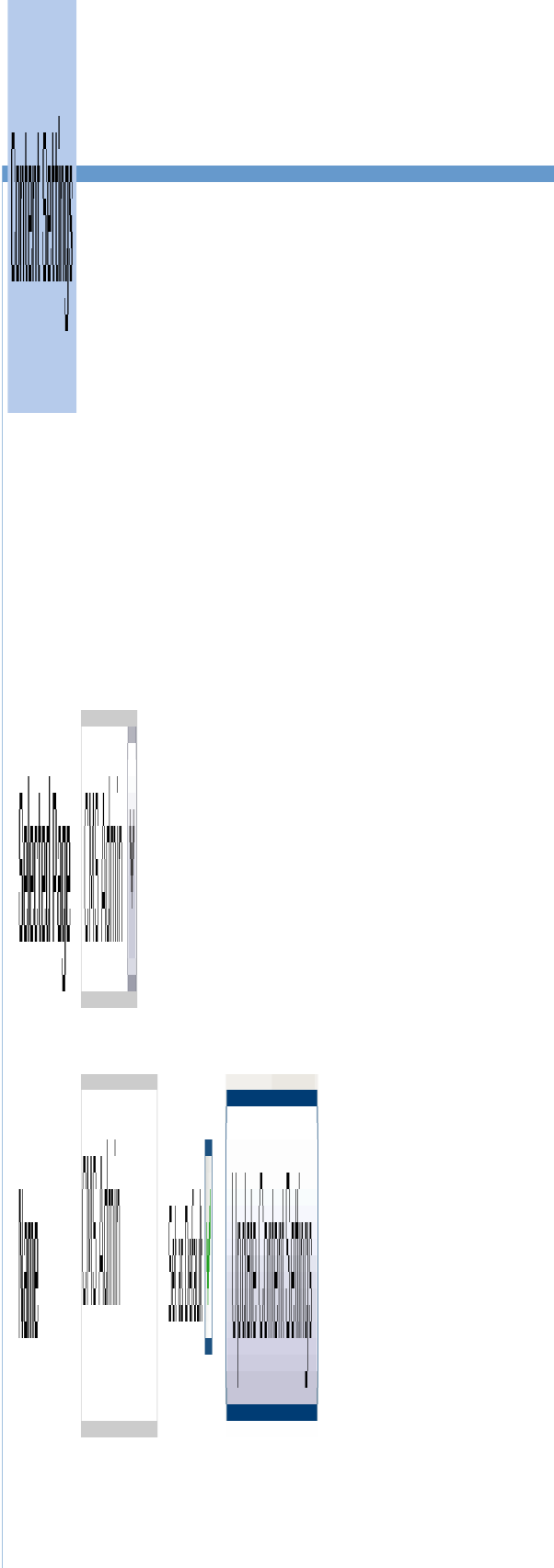


Figure 35: Content Settings

1. In order to add or remove portlets from a certain page, the CMS admin must first select that page from the "Selected Page" drop-down menu.
2. The CMS admin may also change the name of a selected page by entering a new name for that selected page and pressing the "Update Content Settings" button right next to it.
3. Portlets are classified into different categories.
 - a. In order to find specific portlets, the CMS admin will need to first click on the appropriate category link, and all of the available portlets within that category will appear on the right of the "Categories" column.
 - b. In order to select specific portlets to feature on a page, once the CMS admin has chosen a category, the boxes next to the appropriate portlets need to be checked.
4. Each portlet has a predefined association with either wide columns (w) or narrow columns (n). Narrow Portlets will only fit on either of the two narrow columns, whereas the wide portlets will only fit inside of the single wide column.

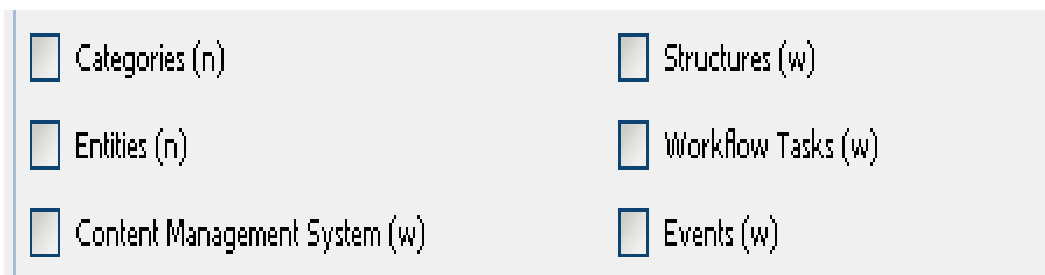


Figure 36: Wide and Narrow Columns

Layout

The layout section of the "Edit Pages" page deals with how the selected portlets will show-up in the page that was selected above.

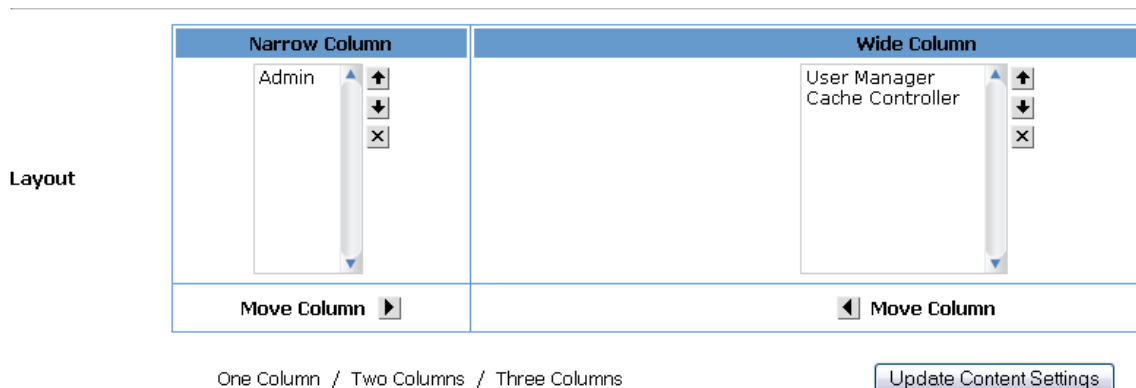


Figure 37: Page Layout

1. The CMS admin can decide to display the Portlets within one, two, or three columns. However, for these to show-up, there needs to be at least the same amount of portlets as there are columns.
2. There are two types of columns: wide and narrow.
 - a. The first column present by default is a wide column.
 - b. Any of the columns added after this one will be narrow columns.
 - c. If at least one narrow and one wide portlet are selected, two columns will appear by default, and the appropriate portlets will appear as listed inside each of the columns.
3. The CMS admin is limited in the way in which he/she can distribute the selected portlets into different columns depending on whether a portlet fits in a narrow (n) column or (w) wide column.
4. The vertical order in which portlets will show up in each column can be managed by using the up and down arrow buttons on the side of each column.
5. If there are two narrow columns, which requires the presence of two or more narrow portlets, portlets can be moved from one side to the other by using the left and right arrow buttons that feature next to each narrow column.
6. Once the appropriate portlets have been selected and arranged, the CMS admin needs to press the "Update Content Settings" button for the changes to be recorded.

Roles

Overview

The main purpose of a role is to give access to specific folders and content within the CMS to the users or groups that inherit it.

In the roles page, the "Add New Role" section deals with the creation of a new role, the "Rename Role" section deals with renaming existing roles, and the "Edit Roles" deals with editing the groups and users associated with each role.

Edit Role	Add New Role
<p>Type name or select from list:</p> <input data-bbox="412 247 639 279" type="text"/> <ul style="list-style-type: none"> Administrator* Bookmarks Admin* Calendar Admin* Careers Administrator* CMS Administrator* CMS Anonymous* CMS User* Document Library Admin* Events Administrator Events User Guest* Journal Admin* Journal Designer* Journal Editor* Journal Writer* KCO Administrator* LoggedIn Site User* Mailing Lists Administrator* Message Boards Admin* Polls Admin* <p><small>* Denotes a system role</small></p> <p> <input data-bbox="386 667 483 688" type="button" value="Edit Groups"/> <input data-bbox="505 667 586 688" type="button" value="Edit Users"/> <input data-bbox="607 667 667 688" type="button" value="Delete"/> </p>	<p>Role Name</p> <input data-bbox="1008 247 1179 279" type="text"/> <p><input data-bbox="1036 300 1154 321" type="button" value="Add New Role"/></p> <hr/> <p>Rename Role</p> <p>Old Role Name</p> <input data-bbox="1008 468 1179 499" type="text"/> <p>New Role Name</p> <input data-bbox="1008 531 1179 562" type="text"/> <p><input data-bbox="1036 573 1154 594" type="button" value="Rename Role"/></p>

Figure 38: The Roles Page

Creating a role

1. Creating a role involves several steps. The first deals with the actual creation of the role, while the second deals with the association of this role with a certain number of portlets as well as permissioning appropriate folders. The latter step is that which gives roles their importance.
2. To add a new role, a CMS admin would navigate to the "Roles" page from the CMS admin page, add the new role's name in the "Add New Role" field, and then press the "Add New Role" button.
3. Once a role has been created, it needs to be associated with certain portlets (see "Associating portlets with roles from the "Portlets" page").

Editing the groups associated with a role from the "Roles" page

A group needs to be assigned a certain number of roles in order to give its users custom access privileges to the CMS. These roles are selected by the CMS admin and will affect all users that join this group.

1. To edit the groups associated with a certain role, a CMS admin would navigate to the "Roles" page, select a specific group and click on the "Edit Groups" button.
2. Once redirected to the "Edit Groups for Role" page, the CMS admin can choose from existing groups in the "Available" column and add them to that specific group by clicking on the arrow button pointing left. Similarly, groups can be removed from a certain role by selecting them from the "Current" column and pressing the arrow button pointing right.

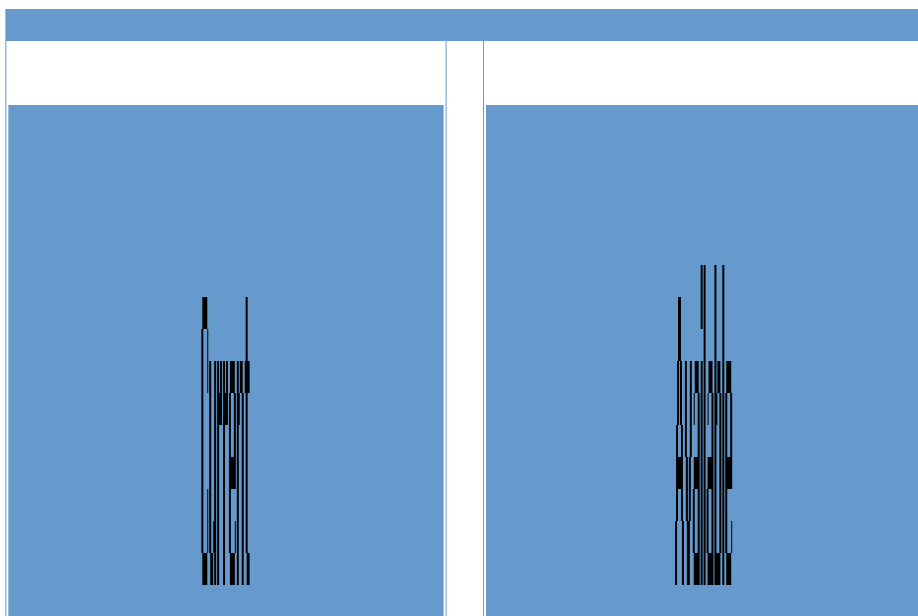
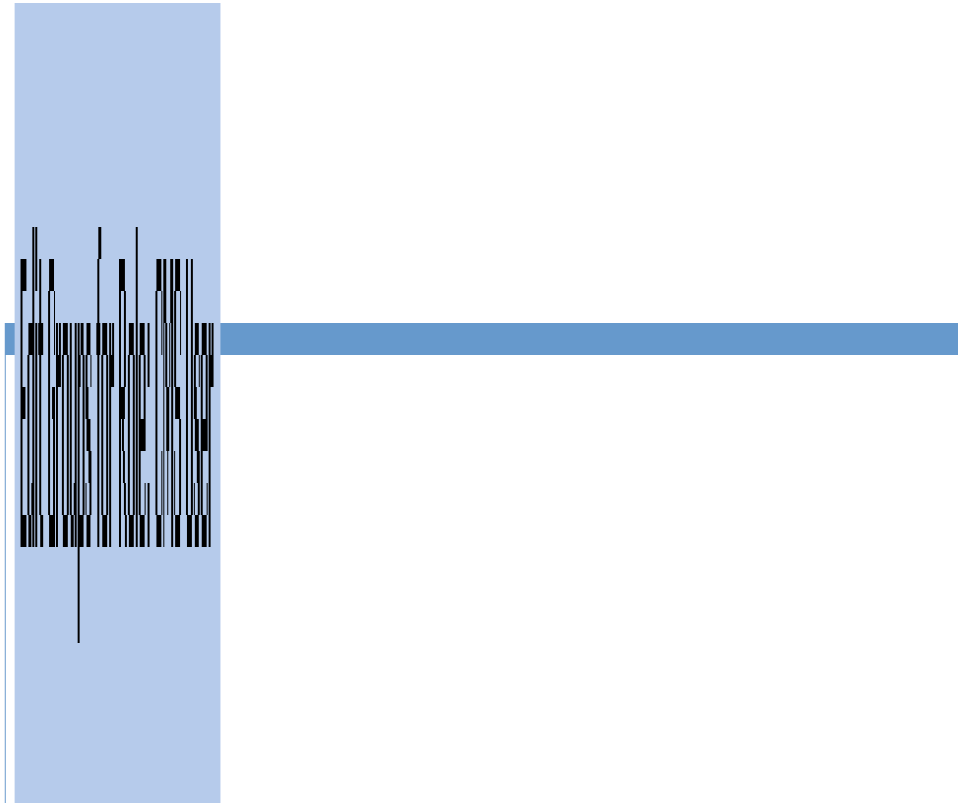


Figure 39: Edit Groups for Certain Roles

3. Once the changes have been made, the CMS admin would press the "Update" button to save the changes.

Editing the users associated with a certain role from the "Roles" page

1. In order to choose which users need to be associated with a certain role, a CMS admin would need to navigate to the "Roles" page, select a specific role, and then press the "Edit Users" button.
2. Once redirected to the "Edit Users for Role" page, the CMS admin can choose one or more users in the "Available" column and add them to that specific role by clicking on the arrow button pointing left. Similarly, users can be removed from a certain group by selecting them from the "Current" column and pressing the right arrow button.

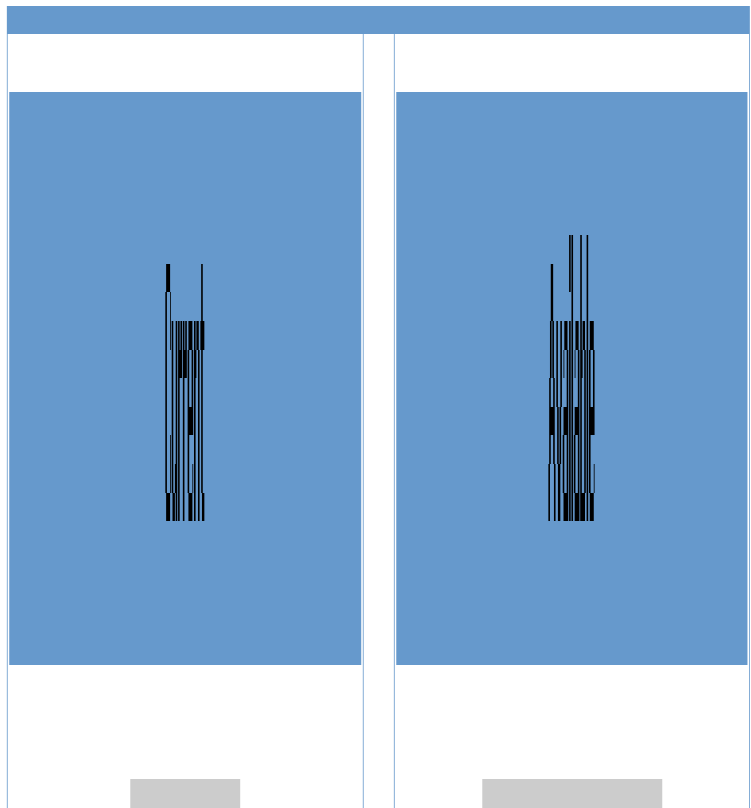
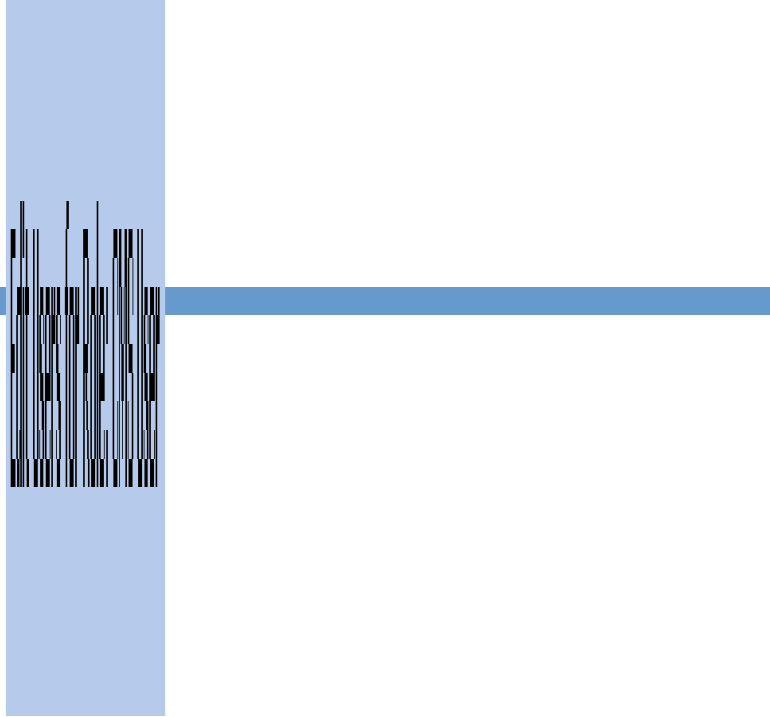


Figure 40: Edit Users for Role Page

3. Once the changes have been made, the CMS admin would press the "Update" button to save the changes.

User Manager

The User Manager Portlet allows a CMS admin to add a new user from the "Add New User" link. Furthermore, it allows a CMS admin to search for an existing user providing some aspects of that user's profile such as that user's last name, email address, and phone number among others.



The screenshot shows a portlet titled "User Manager" with a sub-header "Add new User". The form contains the following fields:

- First Name
- Last Name
- Email Address
- City
- State
- Zip
- Phone

At the bottom of the form are two buttons: "Clean Form" and "Search".

Figure 41: The User Manager Portlet

Cache Controller

The cache controller is a portlet that deals mainly with how the server interacts with the CMS. Therefore, it is not recommended for CMS administrators to use this feature. It is comprised of three parts: the Cache section, the Static Files section, and the Content Index section.

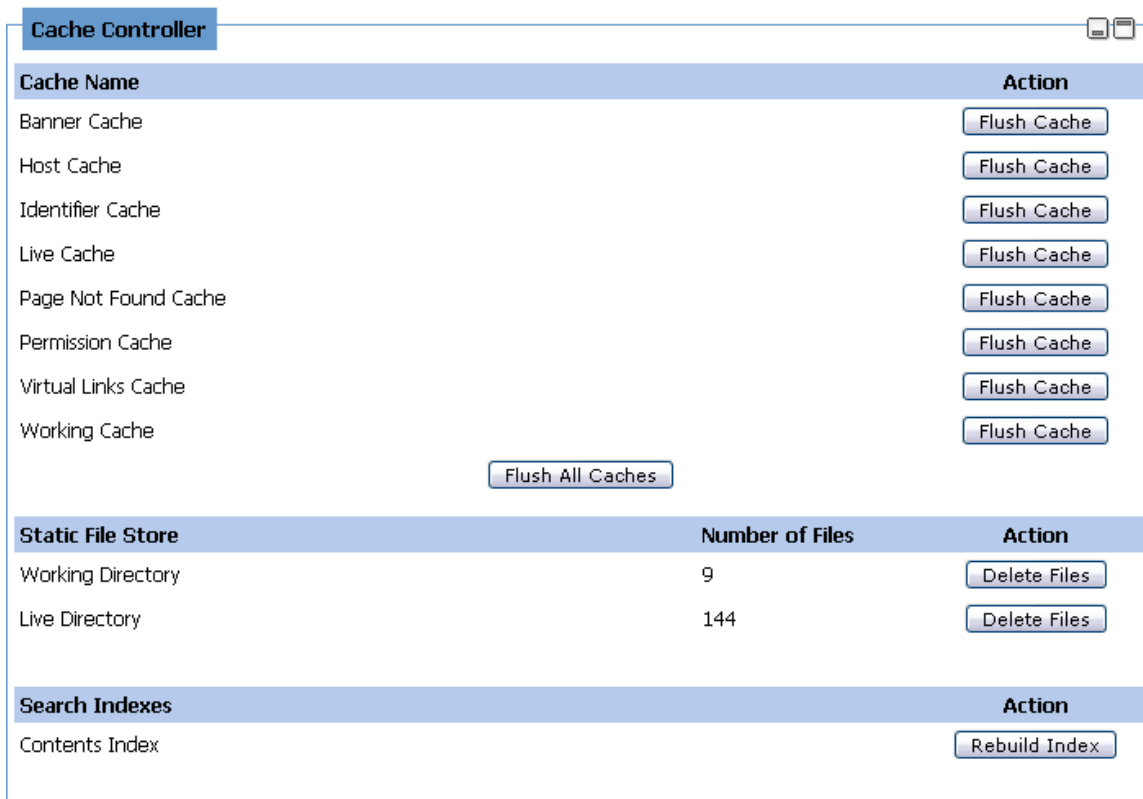


Figure 42: The Cache Controller

The cache section of the portlet deals with how different content from the database is managed by the server in order to maximize performance in the front-end. The purpose of cache is to avoid having to access the database every time that information is being accessed by a user in the front-end. Instead, once certain information is accessed, it is stored in the server's memory which makes it accessible faster for every following user that wishes to access this information.

Flushing the cache erases all of the information in the server's memory that relates to content. Once flushed, the server cache becomes empty. It will then gradually fill every time a user tries to access content that is not yet cached as it is being retrieved from the database and it is simultaneously added to the cache. Different sections of the cache may be flushed, as well as the whole cache.

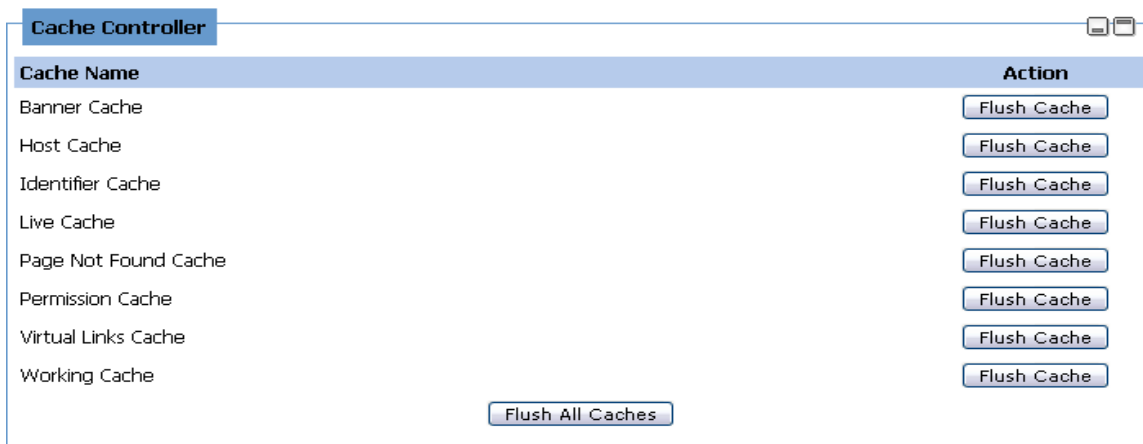


Figure 43: The Cache Section of the Cache Controller

Static Files

Static files are similar to cached files in that they are stored on the server rather than the database for faster accessibility from the front-end. However, the difference is that these files are saved on the hard drive of the server.

The working directory is comprised of content in preview mode, while the live directory is comprised of content files in live mode. A CMS admin has the option of deleting both of these directories separately.

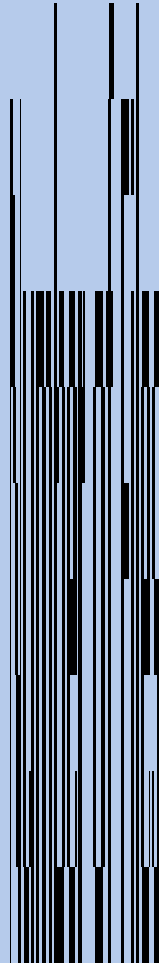
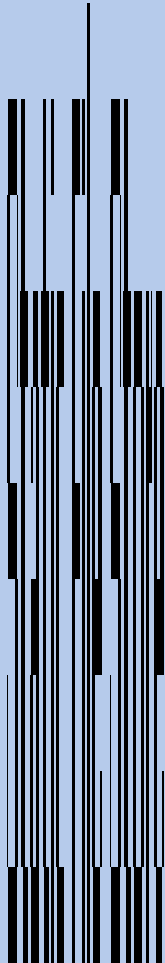


Figure 44: Static Files

Contents Index

Every time content is added to the database, it is also indexed by the server as to enable quicker access. When a user triggers the retrieval of certain content from the front-end, it goes through the index file that guides the process most effectively.

The CMS Administrator has the option of rebuilding the entire index by clicking on the "Rebuild Index" button. While it is being re-indexed, users on the web site may not be able to access all of the available content as it is being gradually indexed.

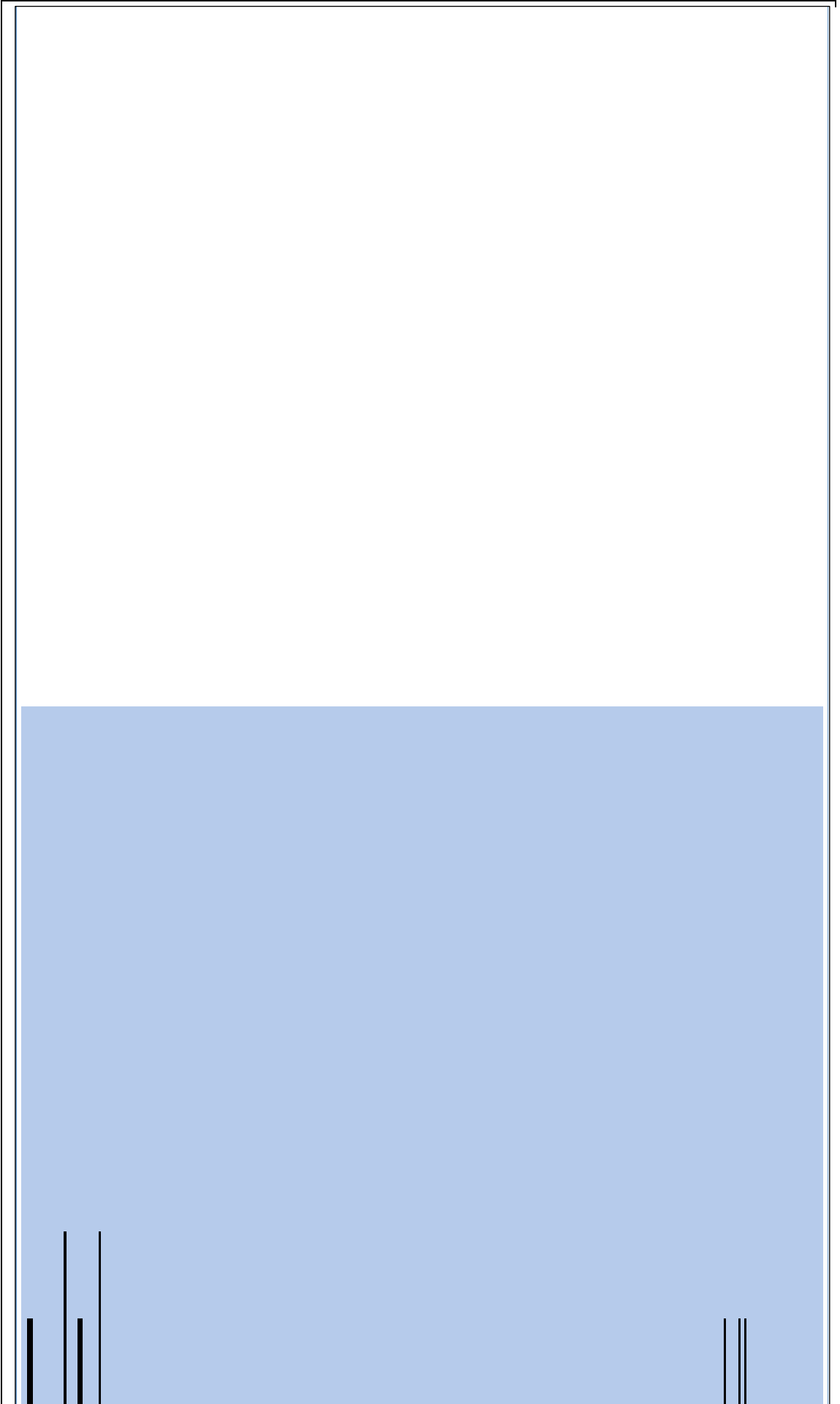


Figure 45: Search Indexes

List of Groups Available in the CMS

The following are different groups present in the CMS. Users may become part of one of more groups, which will in turn lead them to have different access privileges.

- General users
- CMS Users
- CMS Administrators
- Marketing Administrators
- Events Administrators
- Events Users
- User Administrators

[List of Pages and their Respective Portlets Available in the CMS](#) Error! Bookmark not defined.

The following section lists the default pages present in the CMS, which groups have access to them, and what portlets feature on each of these pages. All of these can be changed according to user specifications; however it is recommended to follow this structure as best practice.

Home: (General users)

- Workflow tasks
- My Account

Website: (CMS Users, CMS Administrators)

- CMS (Maximized, one column)

Content: (CMS Users, CMS Administrators)

- Content Manager (Maximized, one column)

Data Structure: (CMS Administrators)

- Entities (left side top)
- Categories (left side middle)
- Language (left side bottom)
- Structures (right side top)

- Virtual Links (right side bottom)

Marketing: (Marketing Administrators)

- Campaign Manager (right side)
- Mailing List Manager (right side)
- Mailing List Builder (right side)
- Web Forms (left side)

Events: (Events Administrators, Events Users)

- Facility Manager (left side: Events Admin only)
- Events portlet (right side, top)
- Events Approval (right side, bottom: Events Admin only)

CMS Admin: (CMS Administrators, User Administrators)

- Admin portlet (left side)
- User Manager (right side)
- Cache Controller (right side, only if CMS Administrators)