



**FlexWEB Site Administrator's Guide**

**FlexSCAPE LLC**

*Turn Key Solution*

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## Chapter 1

# Introduction

## Welcome to FlexWEB

FlexWEB is a browser-based application that allows people with no Internet or HTML experience to create professional web sites and easily maintain them. FlexWEB is part of a turnkey solution provided by FlexSCAPE LLC, which includes site design, domain name registration, initial site setup and customization, as well as web and e-mail hosting.

## About This Manual

This manual is provided to assist you with the administrative functions of your site, including setting up user groups, content management, templates, image, and file libraries, and all the other behind-the-scenes site configuration functions that lend true power to your site. A companion volume, the FlexWEB Author's Guide, provides everything you need to know to set up and maintain the visible components of your web site, including web pages, text, images, and basic site structure.

## Who Can Use This Manual

Your organization's web site may have as little as one site administrator who has ultimate control over some of the more advanced site management features. Tasks like setting up the basic page design templates, modifying the style sheet, controlling site settings, and creating discussion groups are best performed under the centralized control of a single person or group, rather than subjected to random control by multiple persons or groups. If you are one of the designated site administrators, this manual is for you.

By contrast, any number of people in your organization may be allowed to create and maintain web pages. A large web site may have many authors with control over various parts of the site. The secure FlexWEB design allows the maintenance of each individual page to be assigned to a specific site member or group, so that only the authorized person can access and edit the page. The FlexWEB Author's Guide is provided for this group of people.

## FlexWEB Features

For a comprehensive introduction to FlexWEB features, see the Author's Guide. The following table lists most of the major product features and explains which manual to consult for the information you need.

Feature	Site Administrator's Guide	Author's Guide
Web page manager	n/a	How to set up and edit web pages
Page templates	How to set up web page templates	How to use page templates
Content management	How to set up the library, add categories and content types	How to insert articles and search forms into web pages
Surveys	How to set up surveys	How to create web pages with survey forms
Discussions groups	How to set up discussion groups	How to create web pages with discussion groups
Calendar of events	How to set up event calendars	How to create web pages with calendars and event information
Image library	How to set up and manage the library	How to add images and picture galleries to web pages
File library	How to set up and manage the library	How to add file listings, downloads, and uploads to web pages, as well as video and Adobe Flash components.
Member management	How to set up groups	How to create member directory, registration, login, and profile-edit pages
Orientation/tours	How to set up information about tours and orientation sessions	How to publish information about tours and orientation sessions
E-mail management	How to manage e-mail	How to create subscribe and unsubscribe forms
Realty listings	How to set up and manage real estate listings	How to publish property listings and create pages with real estate search forms.
Other	How to control site settings and view site statistics	How to publish news and weather information from remote feeds, as well as information from databases



## Logging in as an Administrator

The FlexWEB system works through most ordinary web browsers, including those listed in the following table:

PC	Mac
IE 6 and 7+	FireFox 2.0+
FireFox 2.0+	Safari 3.1+
Safari 3.1+	

**Note:** + means “or higher”

To access the FlexWEB site as an administrator, you must have an authorized user ID and password.

### To log in to FlexWEB:

1. Open your web browser and go to the Login page of your web site. This should be your regular web site URL, followed by “/fw/admin.” For example:

**www.mywebsite.com/fw/admin**

2. Enter your authorized user name and password.
3. Click the **Login** button. This opens the FlexWEB Site Administration interface. For details, see [Understanding the FlexWEB Interface](#).

**NOTE:** If your password is not accepted, and you think you may have forgotten the correct password, see [Forgotten Password](#).

### To log out of FlexWEB:

1. Click the **Exit Administration** tab at the top of the Site Manager panel.
2. If you have unsaved changes, you will be prompted to save them. Click **Yes** to save your changes.

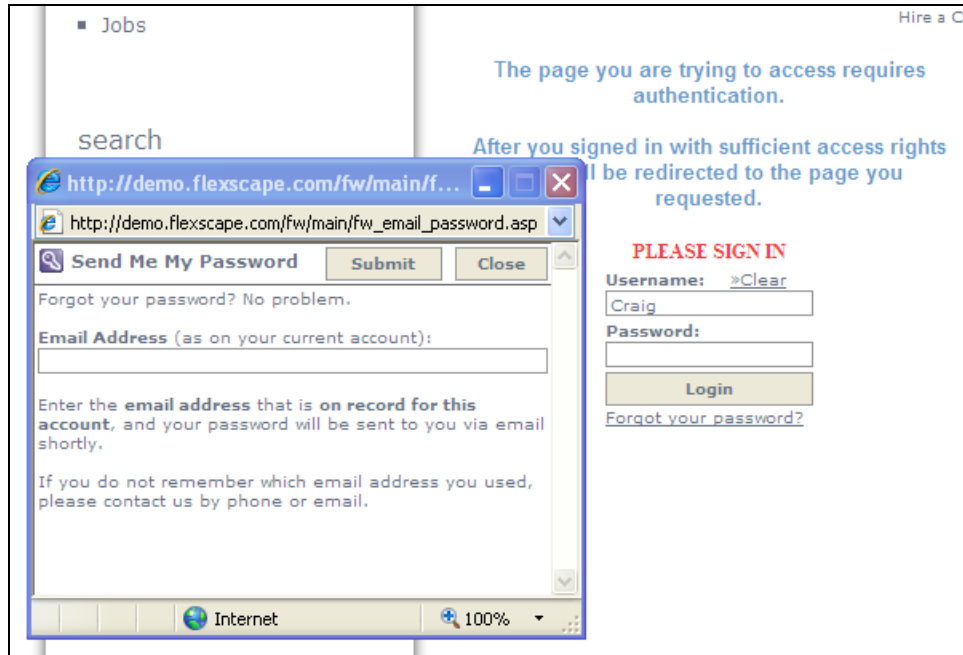
This closes the FlexWEB user interface and returns you to the normal browser window.

## Forgotten Password

If you forget your password, you can have FlexWEB e-mail it to you.

To retrieve your password:

1. Click the **Forgotten Password** link on the login page. This opens the Send Me My Password window.



2. Enter the e-mail address registered for your account and click the **Submit** button. The password will be sent to you via e-mail.

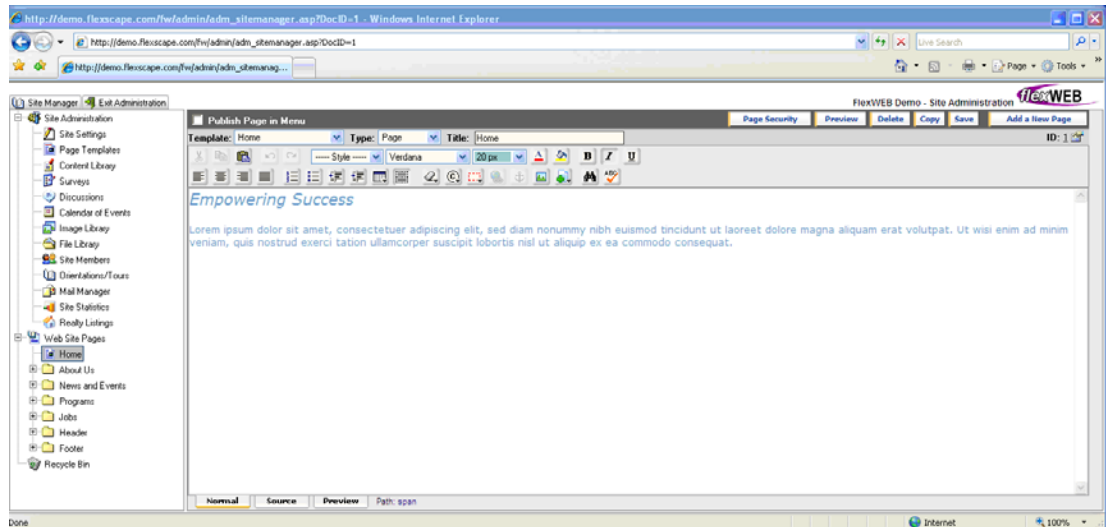
**NOTE:** If you do not remember which e-mail address you used to register with FlexWEB, please contact your FlexWEB vendor by phone or e-mail for support.

## Resetting Passwords for Other Users

If a user contacts you about a forgotten password, you can help them use the automatic e-mail feature listed under [Forgotten Password](#). Or you can reset their password using the procedure for Editing an Existing Member.

## Understanding the FlexWEB Interface

The FlexWEB Interface is the main screen that you will use to operate all of FlexWEB's advanced features. This screen is divided into a *Site Manager panel* on the left, and a *main window* on the right.



### Site Manager Panel

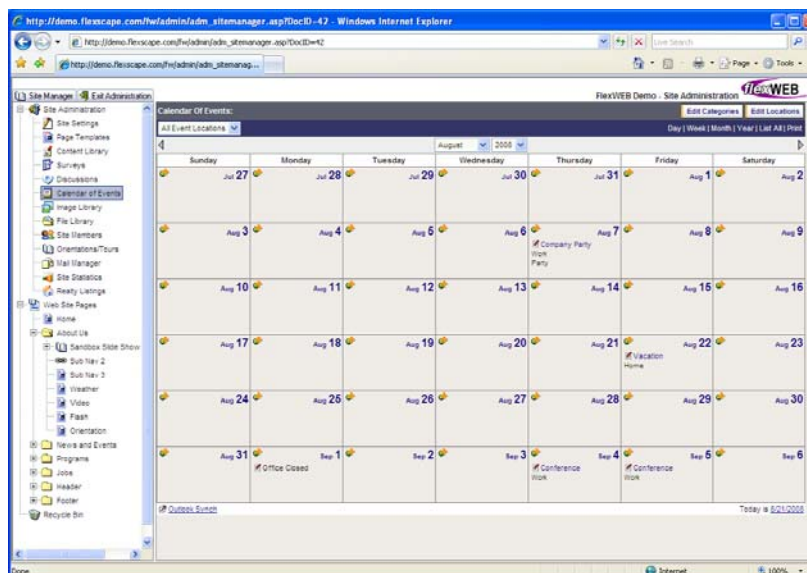
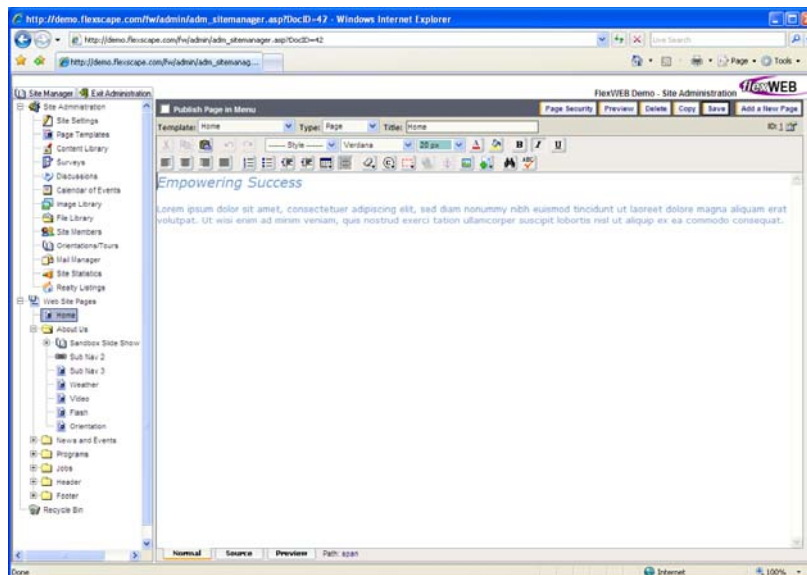
This panel provides access to all the tools you will need to manage and build your site. The panel is organized into a tree structure with the following main components:

- **Site Administration.** This is the main control panel for FlexWEB, allowing you to set up the content library, calendar of events, image library, discussion groups, and all other content types. When you click on this header, the main window shows a summary of all the major Site Administration tools. Most of these tools are covered in the FlexWEB Site Administrator's Guide.
- **Web Site Pages.** This section shows the current structure of your web site, and allows you to view and change any page on your site. When you click on this header, the main window shows you a summary of all the pages on your site. Initially, this list is empty until you begin adding pages to the site. Once you start adding pages, they will appear as a continuous list in this view. For this and any other table list in FlexWEB, you can sort the list in a variety of ways by clicking on the column headers. Access to and authoring of web site pages is covered extensively in this manual.
- **Recycle Bin.** This section holds any pages that you have removed from the site. You can reinstate a deleted page by simply dragging it from the Recycle Bin back into the Web Site Pages tree.

You can collapse the Site Manager panel, and make more room for the main window, by clicking the Site Manager tab at the upper left corner of the page. If you need to redisplay the Site Manager panel at any time, just click the Site Manager tab to bring it back.

## Main Window

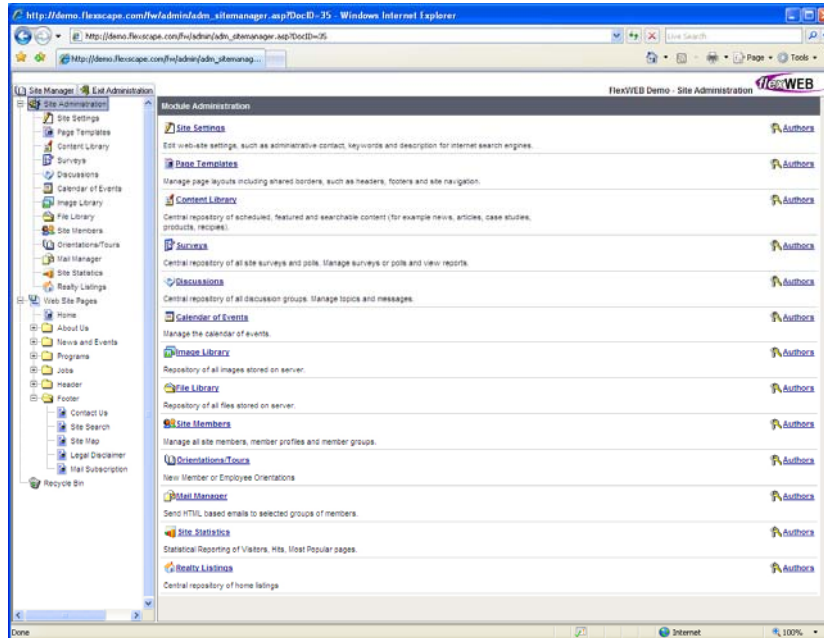
This area provides a working area where you will do most of your work. It changes depending on which feature you have selected in the Site Manager panel. For example, if you select **Calendar of Events** from the Site Manager panel, the main window changes to a calendar that you can use to post new events or modify existing events. If you select an existing web page from the Site Manager panel, the web page content will appear in the main window, where you can edit it.



If you need more room for the main window, click the **Site Manager** tab at the upper left corner of the page. The Site Manager panel will collapse and the main window will expand to fill the screen.

## Module Administration Window

This window appears when you select the **Site Administration** icon in the Site Manager panel.



The main purpose of this window is to provide you with an easy overview of all the site administration features, and allow you to set author access to each of the modules. For more details, see [Site Administration Access Rights](#)

## Site Authors

### Setting up Authors

Authors can be set up to manage certain administration modules, categories, or pages of the web site. Authoring rights are given by the site administrator on the member's information page in the Site Members section. Members with authoring rights will appear on the list of available authors for modules, categories, or pages, but will not have the ability to edit them until the site administrator grants access to the specific topic. Once a member is given authoring rights and permission to edit certain topics, categories, or pages, they will only see the items they have the right to edit when they login as an administrator.

#### To set up a site member as an author:

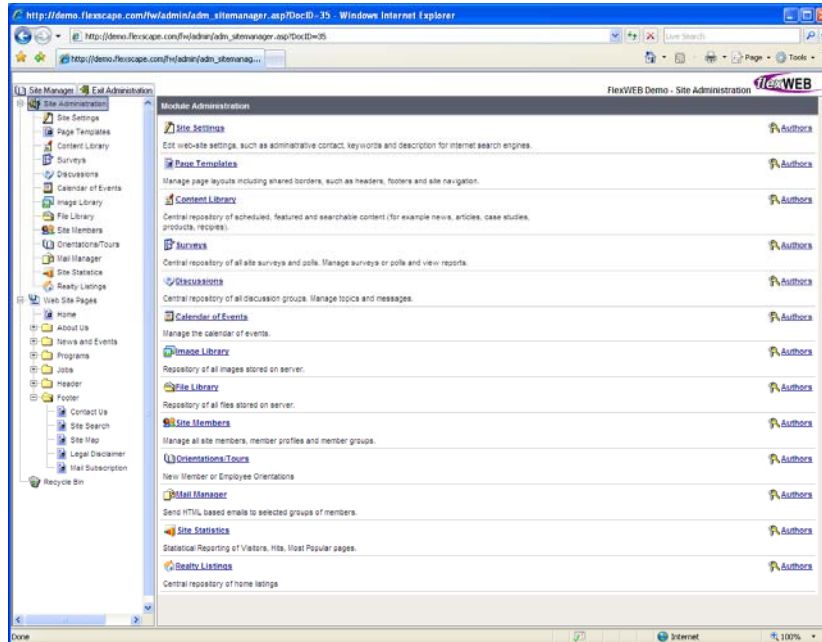
1. Click the Site Members icon in the Site Administration area. This will show you a list of all the current web site members.
2. Click the member's name that you want to give authoring rights. The member's information page will open.
3. Click the **User Status** dropdown box to change the member's status. By default, the status is **Site User**. To give authoring and publishing rights, select **Author and Publisher**. To give full access of site management, select **Site Administrator**.
4. Click **Save Changes** to apply the change.
5. The member now has author status, but cannot edit any pages until they are given rights to specific administration modules, categories, or pages.

## Giving Administration Module Rights

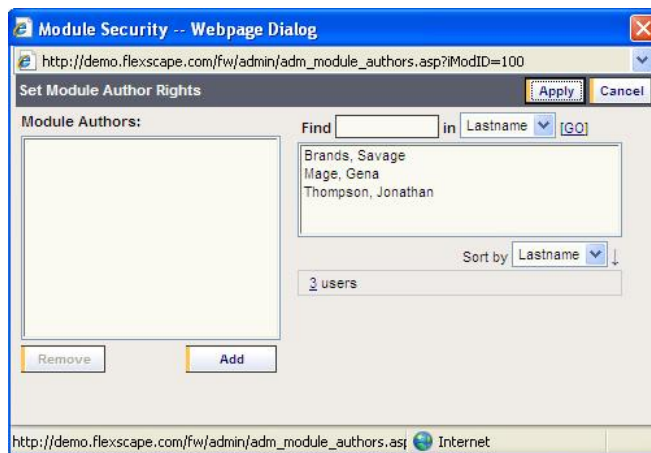
The site administrator can give an author permission to edit one or more administration modules.

To give or remove an author rights to site administration topics:

1. Click **Site Administration** in the Site Administration area. This will bring up a list of all the administration modules.



2. Click the **Authors** link on the right side of the screen for the topic you want to give an established author editing rights. The Set Module Author Rights will open. The Module Authors list, on the left, shows the authors already permitted to edit the topic. The right list shows all of the available authors that do not have rights to this topic.



3. Add or remove authors from the lists to establish who will have authoring rights to the topic.
  - To allow an author editing rights to a topic, click a name on the right list and click **Add**.
  - To remove an author who previously had rights to edit the topic, click a name on the left list and click **Remove**.
4. Click **Apply** when you are done making your changes. You will return to the administration module list, and will see any authors with editing rights to a topic listed under the Authors link.

## Giving Category and Page Author Rights

The site administrator can give an author permission to edit Categories or only specific pages of the web site. If the author is given rights to edit a Category, they will be able to edit all of the pages within the Category.

### To give or remove author rights for Categories and specific pages:

1. Click on the Category folder or a specific page you want to give a member with author rights permission to edit.
2. Click the **Page Security** button at the top of the screen. A window will open showing authors that currently have authoring rights to the Category or specific page, and all available authors who do not currently have authoring rights to the Category or page.
3. Add or remove authors from the lists to establish who will have authoring rights to the topic.
  - To allow an author editing rights to a topic, click a name on the right list and click **Add**.
  - To remove an author who previously had rights to edit the topic, click a name on the left list and click **Remove**.
4. Click **Apply** when you are done making your changes. You will be returned to the screen for the Category or page you previously selected.



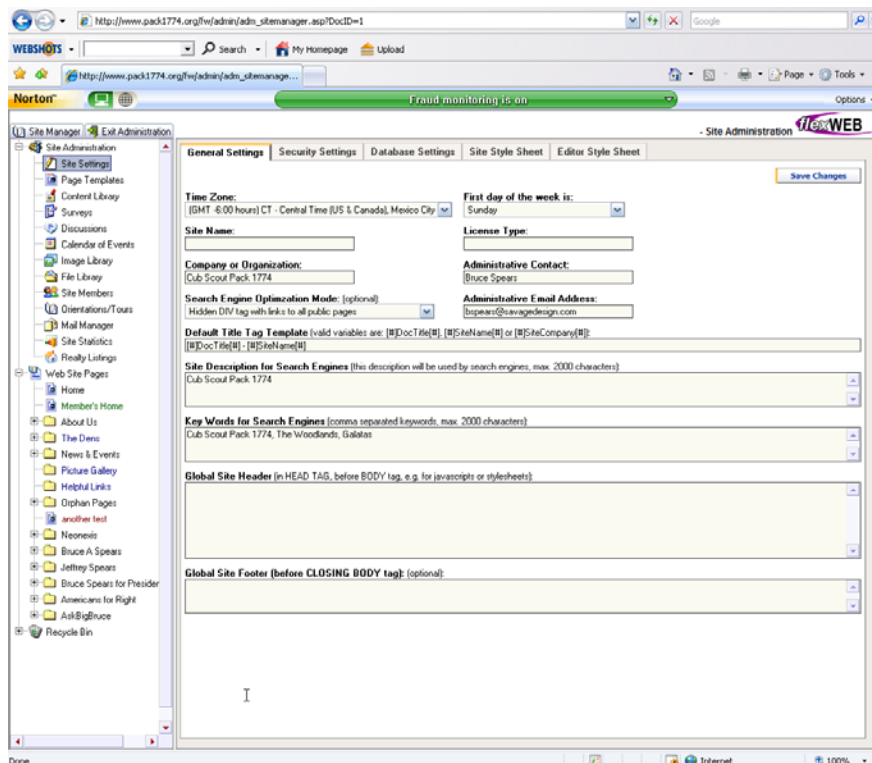
## Chapter 2

# Site Settings

The Site Settings Module in the Site Administration area is a top-level for site administrators' use. This area is where site administrators edit web site settings, set up administrative contacts, create keywords, and set descriptions for internet search engines.

## General Settings

This feature allows you to control many of the most basic settings for the web site, including the time zone, organization name, and many of the default settings for web page authoring.



**To adjust the general settings:**

1. Click on **Site Settings** under Site Administration.
2. Click on the **General Settings** tab.
3. Make the following entries and selections.

<b>Entry</b>	<b>Purpose</b>
Time Zone	Select the appropriate Time Zone for the location of your organization's main office.
First day of the week is	Enter what day of the week the calendars should use as the first day of the week.
Site Name	Enter a descriptive name for this web site.
License Type	Enter the code for the FlexWEB level purchased.
Company or Organization	Enter your company or organization name.
Administrative Contact	Enter the name of the Administrative Contact for this web site.
Search Engine Optimization Mode (Optional)	Enter how you want your site to be optimized for search purposes from the dropdown menu. The default setting is Hidden DIV tags with links to all public pages.
Administrative E-mail Address	Enter the e-mail address of your Administrative Contact.
Default Title Tag Template	Enter the default title for your web pages. This is the set of words that will appear in the title bar of each page if the page author does not specify a page title. You can enter specific words, or type in any of the following variables: [#]DocTitle[#] – The title defined by the author for the web page. [#]SiteName[#] – The Site Name as defined above. [#]SiteCompany[#] – The Company or Organization Name as defined above.
Site Description for Search Engines	Enter the site description. This description will be used by search engines when it returns a URL for your site. You can enter a description of up to 2000 characters.
Key Words for Search Engines	Enter a set of keywords that best describe the content of your site, the mission of your organization, or the products or services that you provide. These will be used in metadata keyword fields, which are used by the major search engines to categorize the content on your site. Place a comma between each keyword.

Entry	Purpose
Global Site Header	Insert a global site header in this field. Any characters you enter here will appear verbatim in the header area (between the <HEAD> tags), on each page of your site. This may include JavaScript code or style sheet references.
Global Site Footer (before CLOSING BODY tag):	Insert global site footer information in this field. Any characters you enter here will be inserted as text at the bottom of each web page on your site. This may include HTML code for formatting of the information. A good example of universal footer information is company name, disclaimers, or copyright information.

- When you are finished making the entries and selections above, click the **Save Changes** button at the top of the window.

## Security Settings

This feature allows you to control many of the security settings of your web site, such as session expiration time limits, password lookup access, and more.

To adjust the security settings:

- Click on **Site Settings** under Site Administration.
- Click on the **Security Settings** tab.
- Make the following entries and selections.

Entry	Purpose
Optional Default Login Page	Select a Default Login Page from a previously created page of your choosing. When you click on this field, it displays the Web Site Page tree, which lets you select the page from a diagram. Remember to insert a login module on the selected page, if one has not been created already.
Session Expiration	Set a session inactivity time limits for users with the drop down menu. If the user has not accessed a page within this time limit, the user will be automatically signed out.
Allow password lookup of site members for	Set who can lookup site member passwords from the drop down menu. Administrator passwords are always invisible, but other user passwords may be visible on certain administrative pages for authorized administrators.

Entry	Purpose
Folder Security Mode	Set a folder security setting for the web site from the drop down menu. This setting controls whether you will have a personal folder as well as group folders available in the File Library and Image Library. Personal folders will only be viewable by you. Group folders will only be viewable by members of the group. For example, if you want authors to have access to certain files or images, you can create a group for the authors and add files or images to the Group folder.
Root Folder & File Access for Authors	Set folder and file access rights for authors from the drop down menu.
Copy Feature	Set whether an Author or an Administrator can copy a Folder in the administration from the drop down menu. When you copy a folder, this creates a copy of the folder with all the sub pages in the folder right under the copied folder.

4. When you are finished making the entries and selections above, click the **Save Changes** button at the top of the window.

## Database Settings

This feature lets you define the field names for the elements contained in the FlexWEB content management database.

To adjust the database field label settings:

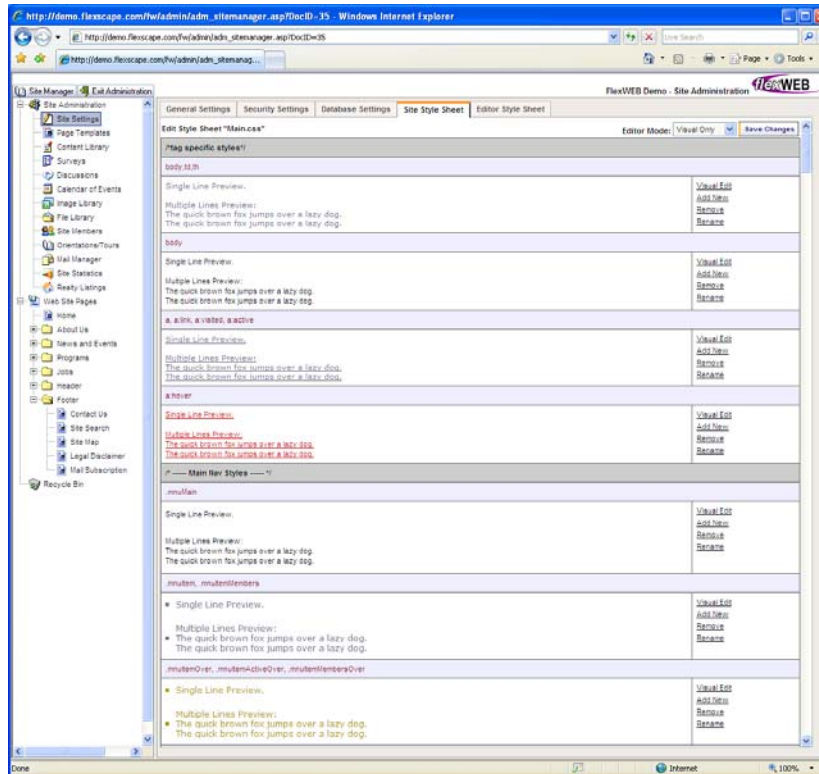
1. Click on **Site Settings** under Site Administration.
2. Click on the **Database Settings** tab.
3. Examine the default field names, and make any changes desired.
4. To save your entries, click the **Save Changes** button at the top of the window.

## Site Style Sheet

This feature allows you to control the underlying style sheet for your web site. These are the text styles used for structural components such as navigation bars, toolbars, menus, and input fields. The site style sheet is typically provided for you by the site designers, but you can modify the styles at any time. Making a change to a particular style tag within the style sheet will change the appearance and formatting of every site component using that tag, across the entire site.

To view the style sheet settings:

1. Click on **Site Settings** in the Site Administration panel.
2. Click on the **Site Style Sheet** tab. This displays an extensive list of all the style tags in the style sheet. You can set the individual properties for each style tag, remove the style tags, or rename the style tags.



Typically, the Editor Mode for the style sheet is set to Visual Only. This means you will see how the style sheet settings look, but not the underlying specifications for each tag.

**NOTE:** If you are an expert user of the Cascading Style Sheets (CSS) specification, you may want to set the Editor Mode to **Text & Visual** or **Text Only**, so that you can see the exact CSS specifications for each style tag.

**To edit or define a particular style:**

1. Scroll down until you locate the style entry in the style sheet.
2. Click the **Visual Edit** link to view the settings for this style. This displays the Edit Style Sheet panel.

**NOTE:** There are two tabs in this panel, representing two different approaches to style tag editing. Most users will want to use the **Edit Style Visual** tab to edit the visual features of the style. If you are an expert in CSS, you can use the **Edit Code** tab to edit the CSS specifications directly.

When using the **Edit Style Visual** tab, you can change any of the following settings:

Field	What to Enter
Text Style	Use the icons provided to set the font style, justification, capitalization.
Font	Use the fields provided to set the font family, size, and color. You can set the font size in pixels, as an enlargement percentage (from the current font size), or as a relative multiplier.
Line Height	Set the thickness of the line or border associated with this text using the drop-down list.
Background	Use the fields provided to set the background color, image, repeating, and position. The Repeat setting is used for small images that are repeated horizontally, vertically, or in both directions to produce a pattern or continuous background effect. The position setting controls the x, y starting point from the top left.
Border	Use the controls provided to set the border type, width, or color.
Padding	Use the controls provided to set the white space allowed along the top, left, right, bottom of the paragraph.
Margins	Use the controls provided to set the top, left, right, and bottom margins for the paragraph style.

**To add a new style to the style sheet:**

1. Click the **Add New** link at any location in the style sheet.
2. You are prompted to enter a new name for the style. When you enter a new name and click **OK**, it adds a new section to the style sheet directly below the section where you clicked the Add New link.

The settings for the new style are blank, so you will need to use the **Visual Edit** link to set them, as defined above.

**To remove a style from the style sheet:**

1. Click the **Remove** link in the section devoted to that style.
2. You are asked to confirm the removal. When you click **Yes**, the style is removed.

**To rename a style in the style sheet:**

1. Click the **Rename** link in the section devoted to that style.
2. You are prompted to enter a new name for the style. When you enter a new name and click **OK**, it changes the name of that section in the style sheet.

**To save your changes:**

To save your changes at any time, click the **Save Changes** button at the top of the Edit Style Sheet window.

## Editor Style Sheet

This feature allows you to control the default paragraph styles used by site authors to format individual paragraphs within their web pages. This style sheet is typically provided for you by the site designers, but you can modify the styles at any time. Making a change to a particular style tag within the style sheet will change the appearance and formatting of every paragraph using that tag, across the entire site. To work with this feature, use the same procedures given for [Site Style Sheet](#).





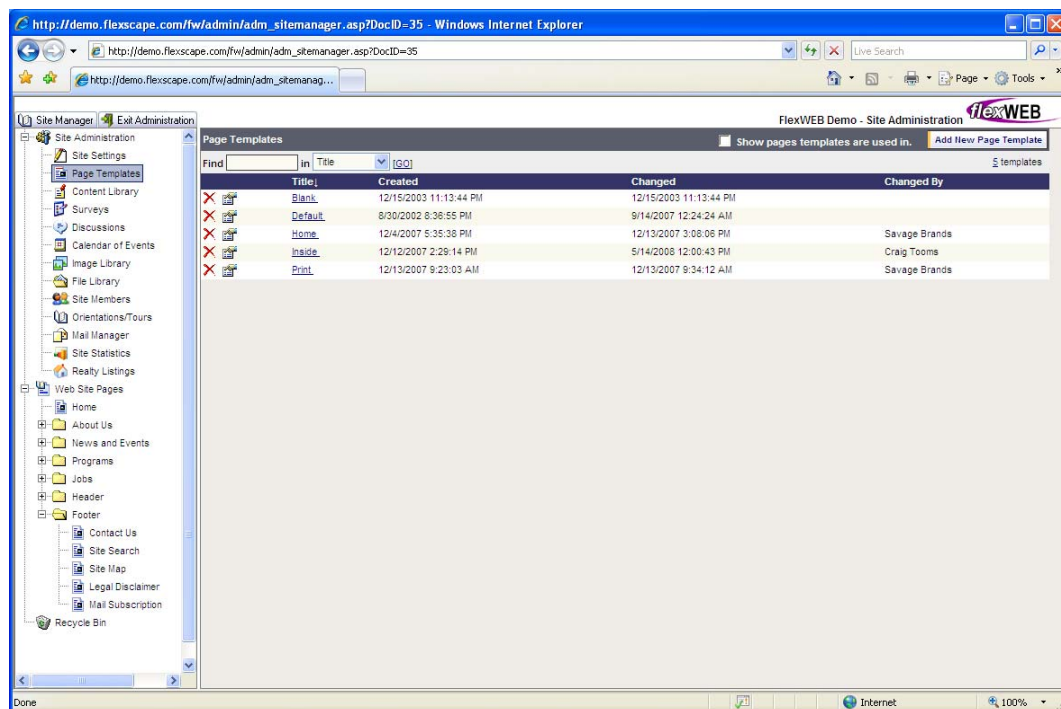
## Chapter 3

# Page Templates

## Understanding the Page Templates

The Page Templates module within Site Administration is where page design templates are stored. These are the basic page layout styles for all the different page types on the site. These templates are typically configured for you by the site designers, and you will not have to manage them on a regular basis. However, complete editing tools are provided, if you need to modify the templates at any time.

To view the current set of web page templates, select the **Page Templates** icon in the Site Manager panel. This opens the Page Templates window.

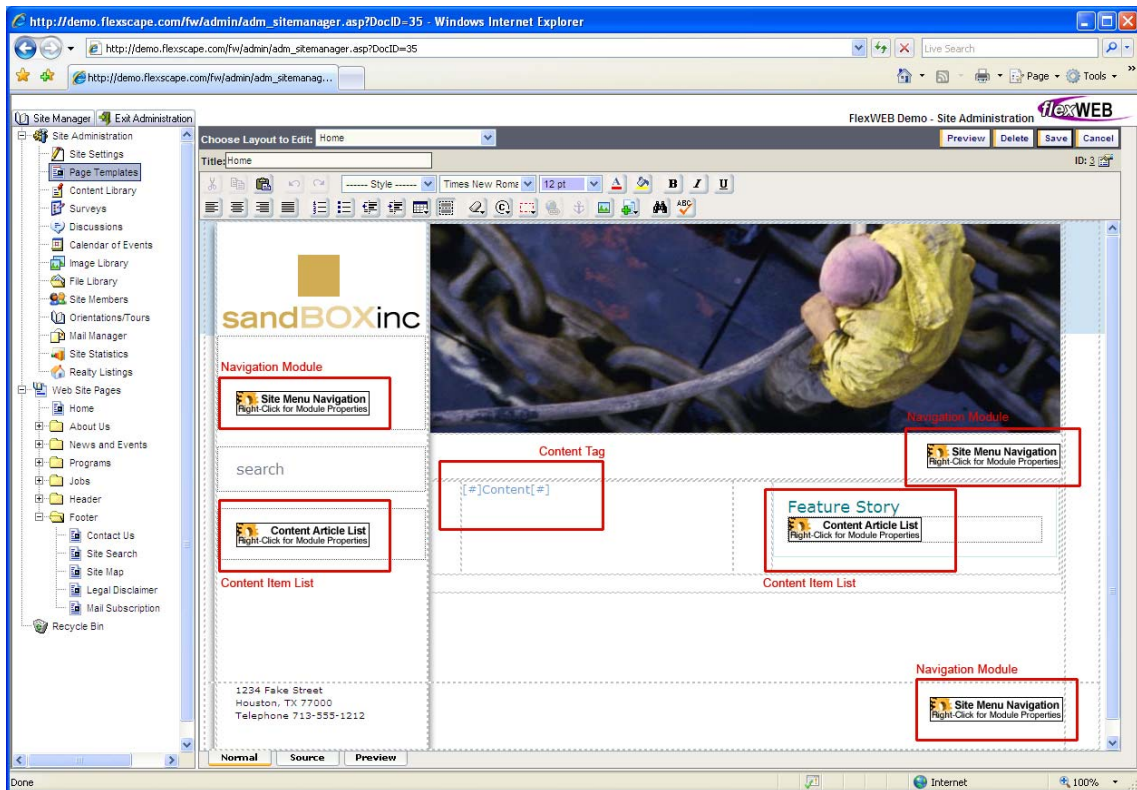


Typically, each section of the web site has its own default page design template assigned to it. When a web author adds a page to that section, the appropriate page design template is applied automatically. If you change the layout of a template in this site administration module, it will automatically change the layout of every page using that template. For this reason, *page templates should be modified only with extreme care.*

The template controls the positioning of all elements on the web page, including the core body text, the navigation elements, headers, footers, background, section icons or themes, and more. Most of the structural components of the page cannot be touched by the individual web authors. For example, the web page author cannot change the position of the navigation, toolbars, or side menu, as dictated within the template design. Instead, the author can only add, edit, or remove the core *body content elements* of the page design. This is typically a central text field on the page that is open to author control. The body content area which can be touched by the authors is labeled in the template using a single variable set inside a text block:

[#]Content[#]

The following illustration shows a typical page design template, with each of the design components called out:

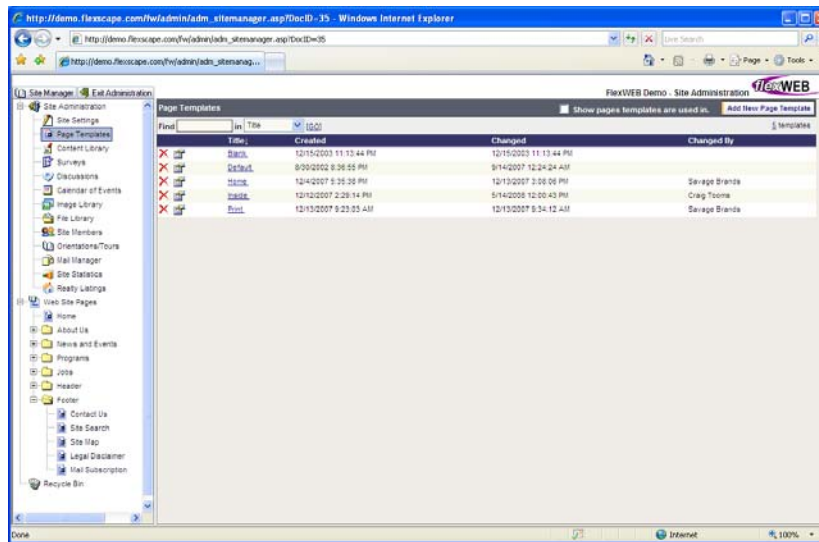


## Adding New Page Templates

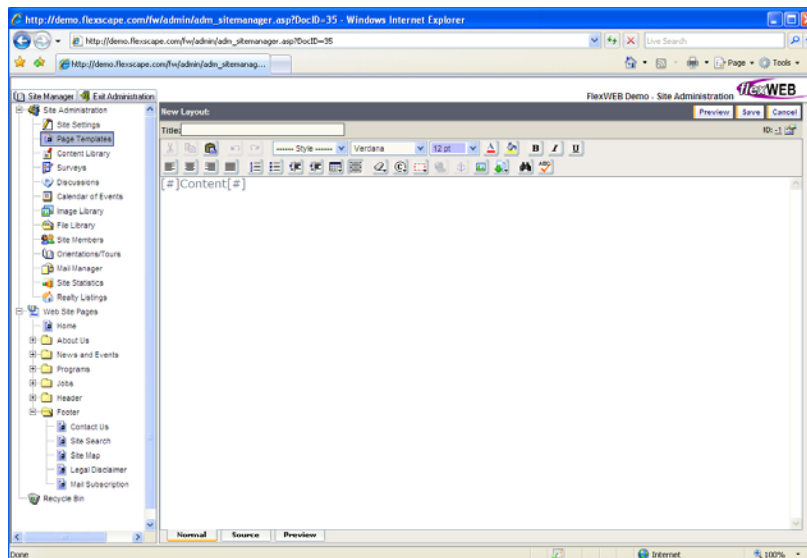
Typically, new web page templates are only added by authorized site designers. If you are not a web site designer, please ask for help before trying to create a new page design layout.

To add a new template:

1. Click on **Page Templates** in the Site Administration panel. This opens the Page Templates window.



2. Click the **Add New Page Template** button at upper right corner of the Page Templates window. A new blank page is added to the main window.



The initial page layout is empty, with a single variable in it: [#]Content[#]. This means that the entire page layout consists of a single large text field, which can be used by the site authors for entering their content. Typically, this is not an acceptable template design, because it includes no margins, no header/footer elements, no navigation elements, or any of the other standard web page controls and layout elements that you will likely find in all the other templates. As a guideline, look at the layouts and components built into the other page design templates. If necessary, you may want to copy some of these elements to the new template and then modify them to fit the new page template requirements.

3. In the **Title** field, enter a name for this template. This is the name that will appear in the Page Templates listing. This name will also appear as an available selection on the Templates list whenever a web author is creating or editing a web page.
4. Use the table building feature in FlexWEB, and the editing controls at the top of this window, to set up the layout and visible components of your template. When setting up the page layout, be sure to leave a single text block containing the [#]Content[#] variable, which will serve as the body copy entry area for web authors using this template.

**NOTE:** For details on table-based layouts and editing controls, see the appropriate sections of the FlexWEB Author's Guide.

5. Click the **Save** button to save the new template page. This adds the template as a new entry in the Page Templates window. This template will now appear as an available selection when site authors are building new pages.

## Editing Existing Page Templates

You can edit any of the existing page templates listed in the Page Template module of the Site Administration panel.


**To edit an existing page template:**

1. Click on **Page Templates** in the Site Administration panel. This opens the Page Templates window.
2. To open an existing page template, click on the Title of the template to edit.
3. Make any additions and changes as necessary to the template. For details on standard FlexWEB table layout and editing controls, see the appropriate sections of the FlexWEB Author's Guide.
4. When you are finished, click the **Save** button located at the upper right of the page.

## Deleting Page Templates

Deleting a page template is a simple process. Just remember when the template is deleted, it will be removed from all pages that use it.

To delete a page template, use either of the following methods:

1. From the main Page Template window, click on the  icon next to the template you want to delete.
2. From the open template, click on the **Delete** button located at the upper right of the page.

## Adding Modules to Page Templates

Many of the typical web page design components are controlled by FlexWEB modules. These are “robot-like” elements that automatically insert a particular feature, such as a navigation bar, search fields, and more. For complete details on module use and insertion, see the FlexWEB Author's Guide.



## Chapter 4

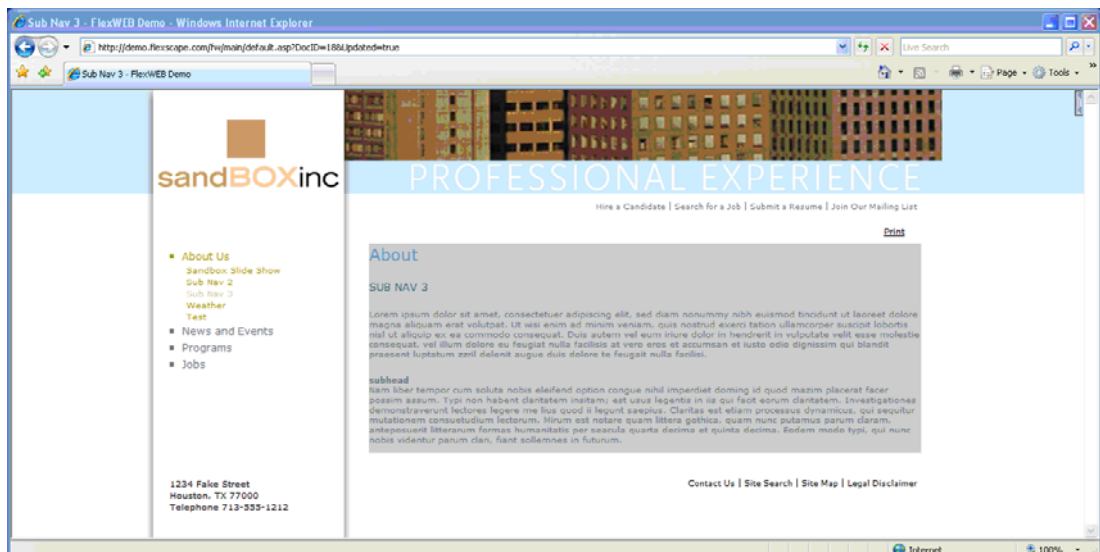
# Content Library

## Understanding the Content Library

The Content Library is a special management area within Site Administration where you can store articles and other written documents that have been formatted for the web so they are easily presented within the web browser. (Compare this feature to the File Library, where documents may be stored that are not formatted as a web page, but are stored in other formats such as DOC, XLS, and PDF.)

The documents stored in the Content Library are typically called articles. You can define different content types and use them to organize your articles into groups. For each article, you can define a title, a short description of the article, a set of search keywords, a release date, and a range of calendar dates during which it will be considered “featured content.” Each article can be prepared with the same set of web page formatting tools discussed in the FlexWEB Author’s Guide.

Once an article is stored in the content library, it can be easily published using the content modules covered in the FlexWEB Author’s Guide. It can also be easily searched.



FlexWEB allows you to set up a ratings system for the articles in your content library. When this feature is enabled, your site users can easily rate the articles that they read on a scale of 1 to 5. The results of these ratings can be saved for review by the site administrator or other authorized site users.

## Using the Content Library (General Procedure)

The Content Library is a top-level selection in the Site Administration area of the FlexWEB Site Manager panel. You can use it to define categories and content types, prepare articles for web publishing, and report on the articles contained therein.

### To use the Content Library:

1. Click the **Content Library** icon under Site Administration in the Site Manager panel. This displays a list of all the major content types currently defined for your site.

Each content type listed along the left edge of this display includes a title, a short description, the associated content categories, the authors, and the total number of articles classified by that type (in parentheses). To view a list of articles for a particular content type, click on the content type name (one of the underlined links along the left side of the window). This will display a list of articles, along with some controls that allow you to:

- Add a New Article
- Edit Categories
- Export to MS Word
- Generate a Report

2. Press the **Backspace** key when you are ready to return to the main page of the Content Library.

While viewing the main window of the Content Library, you have several other options:

- Edit All Categories
- Add New Content Types

For each content type, you have several controls that let you:

- Edit Settings for the content type
- Show a Report for the content type
- Set Authors for the content type

Additional procedures are provided in the following sections that will show you how to perform each one of these operations.



## Adding Content Types

Content types are used to divide the Content Library into organized sections. Each of the individual articles is stored under one of the defined content types. Typically, your site will already have content types defined. You can easily add more, if you do not already have a content type that serves your desired purpose.

FlexWEB allows you to set up a ratings system for the articles in your content library. One of the main functions of a content type definition is to enable and then configure this ratings feature for all articles belonging to this content type. By the same token, you can also use the content type definition to disable the ratings feature for that particular content type. When enabled, the ratings form will appear at the bottom of any article that belongs to the content type.

### To define a new content type:

1. Click the **Content Library** icon under Site Administration in the Site Manager panel. This displays a list of all the major content types currently defined for your site.
2. Click the **Add New Content Type** button. This displays the Edit Content Type dialog box in the main window.
3. Make the following entries and selections:

Entry/Selection	Purpose
Title	Enter the name of this content type.
Description	Enter a short description of this content type.
Allow HTML	Check the box to enable the use of the same HTML editor available for the body of the article in the short description.
Assigned Category(s)	Select each of the categories to be associated with this content type.
Enable Content Rating and Reviews	If you select this checkbox, any article stored under this content type will have the "reader ratings" feature enabled. The following fields all apply to the ratings function.
Rating Prompt	This is the text that the users will see, asking them to rate the article. Change this if you would like it to read differently.
Label for Poor/Excellent Rating	These are the labels used to define each end of the rating scale. Change these if you would like them to read differently.
Show Rating Results to	Use the dropdown list to indicate who should have access to the rating results: the site administrator, all site members, or the public (everybody).
Rating Results Label	This is the label shown with the rating results. Change this if you would like it to read differently.

Entry/Selection	Purpose
Allow Comment Submission For	Use the dropdown list to indicate who should be allowed to enter and submit comments: nobody, all site members, or the public (everybody).
Comment Submission Label	This is the text that users will see, asking them to add comments. Change this if you would like it to read differently.
Name/E-mail Field Label	Enter labels if you want the users to be able to enter their names and e-mail addresses, along with their comments. If you leave these field labels blank, the fields will not appear on the rating form.
Show Submitted Comments to	Use the dropdown list to indicate who should have access to the user comments: the site administrator, all site members, or the public (everybody).
Publish only approved comments	This will allow comments to be published only if they are approved by the site administrator.
Comments Label	This is the text that will introduce the comments, once they are displayed to an approved reviewer. Change this if you would like it to read differently.
Label for Submit Button	This is the label that will appear on the button that users use to Submit their entries. Change this if you would like it to read differently.
Text shown to user after rating	This is the text that will be shown to users once they submit their feedback. Change this if you would like it to read differently.
Rating Column Label	This is the label used for the Ratings column when the ratings are published.
CSS Style Class for Rating Box	This is the style used for the text publishing in the Ratings box.

- Click the **Save** button at the top of the window when you are finished making the entries and selections above, to save the new content type definition.
- Click the **Back** button to return to the Content Library main window.

## Working with Content Categories

Content categories are used as a way of classifying articles on the site so that they can easily be grouped and searched. Each content type can have its own list of content categories, which are sub-groupings of article types. You can also assign “feature dates” to a category so that all articles in that category will be considered “featured content” during the specified range of dates.

The site administrator can create and assign content categories at any time. You can also change category names and descriptions at any time.

**To view all existing categories:**

1. Open the **Content Library** module in the Site Administrator panel.
2. Click the **Edit All Categories** button. This displays a list of all the categories, along with their feature dates, if applicable. You can add new categories to this list, or edit the existing categories.

**To view categories for a particular content type:**

1. Open the **Content Library** module in the Site Administrator panel.
2. Click the name of the content type in this window.
3. Click the **Edit Categories** button. This displays a list of all the categories for this content type, along with their feature dates, if applicable. You can add new categories to this list, or edit the existing categories.

**To add a new category:**

1. Click the **Add New Category** button.
2. Make the following selections and entries:

<b>Entry</b>	<b>Purpose</b>
Title	Enter a name for the category.
Feature category starting	Enter a starting and ending date. This sets the period of time during which all articles in this category will be considered "featured content."
Short Description	Enter a description for the category.
Enter information	Enter text and images in this area. This is a text editor with basic editing capabilities. For full details on editing content, see the FlexWEB Author's Guide.

3. Click the **Save** button at the top of the window when you are finished making the entries and selections above, to save the new content type definition.

## Adding a Content Library Page

The main purpose of the Content Library is to store important documents or “articles” in a way that they can be easily published, organized, and searched online. The documents stored in the Content Library are already formatted for viewing directly inside the web browser.

Compare this to the File Library, which also allows you to store important documents, but in a non-web format, such as DOC or PDF. While some of these file formats can also be viewed inside the browser window, they are not as easily published, organized, and searched online.

The Content Library, therefore, will become a repository of web-based content, which may include individual articles, or entire document sets. Typical examples of Content Library documents include press releases, organization news, job listings, and product documentation.

The following procedure explains how to add these types of documents to the Content Library. By definition, new articles and documents that you add to the library will be added within a Content Type section that has already been defined as a repository for certain types of articles. Articles and documents may also be assigned a Category, which further defines the group of documents to which it belongs.

### To add an article or document to the Content Library:

1. Open the **Content Library** module in the Site Administrator panel.
2. Select a Content Type by clicking on its name from the Content Library main page. This displays the document directory for the selected Content Type, which lists all the articles already stored in that section (if any).
3. Click on the **Add New Article** button.

## 4. Make the following entries or selections:

Entry	Purpose
Title	Enter the title of the article or document. This will appear in all directories or search results for this content type.
Release Date	Enter the date on which you want this document to become available for viewing or searching online. This feature is most useful for content such as press releases, which are typically timed to coincide with specific public announcements.
Marked as new until	Enter a future date after which the document will no longer be considered "new" content and will no longer be featured on related lists or search results.
Feature from ... until	Enter a starting and ending date for the period of time during which this article will be considered "featured content."
Short Description	Enter a description for the article.
Pick Image / Rollover	You can identify an image to be displayed along with the article when it is published. You can also identify a secondary image that is displayed when the user moves the mouse over (rolls over) the primary image. The two image icons to the right of the Short Description field let you access the Image Gallery, where you can select the primary and secondary images.
Remove Image / Rollover	The two delete icons to the right of the Short Description field let you remove the currently selected primary and secondary images.
Type	Select one of these two options from the dropdown list: Content – This article will serve as standard content within the Content Library. Link – Click on Pick URL. Then all your link options will appear. You can link the title of the article to other pages in your web site, to Events on the Calendar, to other Content Articles, to Files in the File Library and to other web sites or to an Email address.
Search keywords	Enter the search keywords which best describe the topic(s) covered in this document. This will increase the chances that the article will turn up when site users enter search terms into a search form.
Select Category(s)	Turn on the check box next to each category in which this article belongs. If you do not see appropriate categories, you may need to create them using the procedures described under <a href="#">Working with Content Categories</a> .
(editing window)	This part of the window is a text editor with full editing capabilities. Enter the body of the article content in this area. This text should be fully formatted using the tools provided and may also include embedded images, tables, hyperlinks, forms, or FlexWEB modules. For complete details on FlexWEB's built-in formatting and editing features, see the FlexWEB Author's Guide.

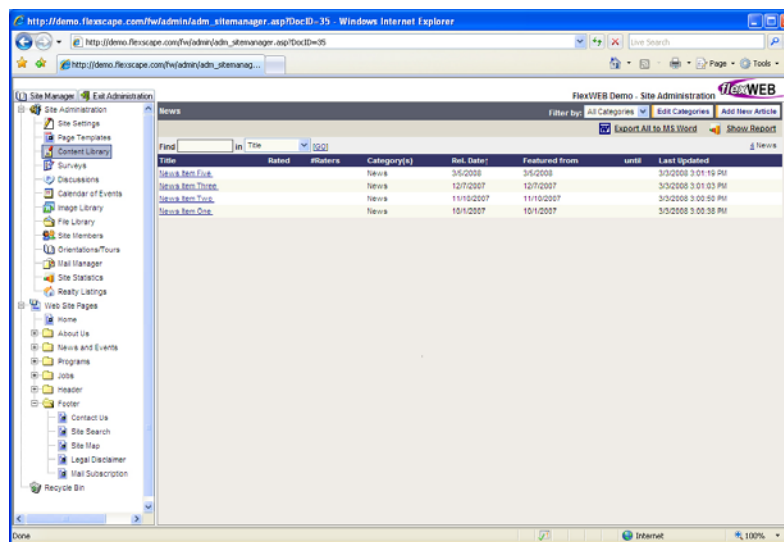
5. Click the **Save** button to save the new article to the Content Library when finished.

## Viewing or Changing a Content Page

Authorized users can view or edit any of the existing Content Library articles or documents at any time.

To view/change an article in the Content Library:

1. Click on the **Content Library** icon in the Site Administrator panel. This displays the Content Types window.
2. Click on the Content Type containing the article. This opens the list of articles for the selected content type.



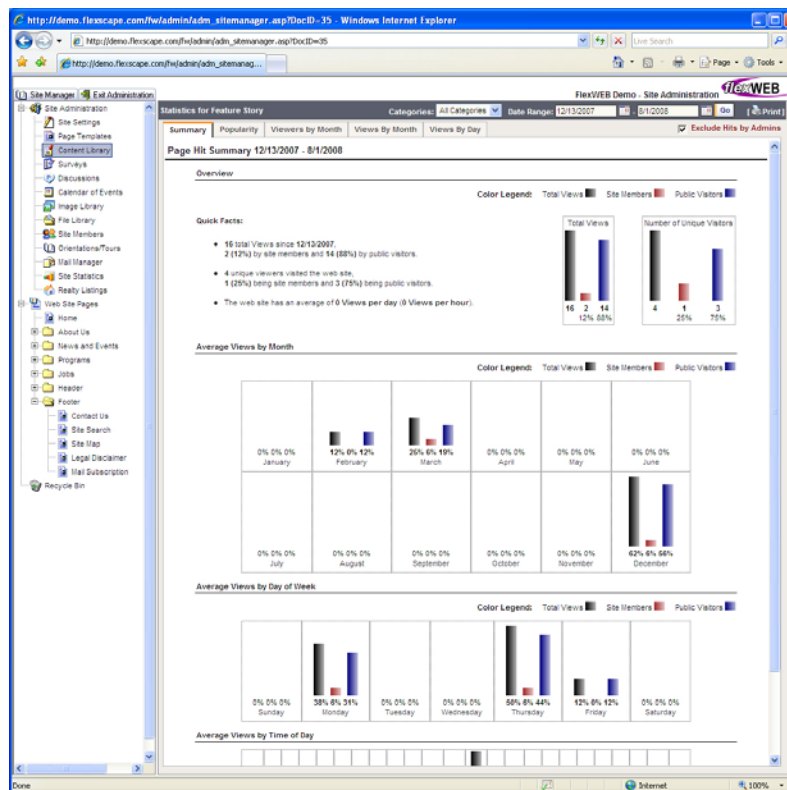
3. Click on the title of the article. This displays the article page, including the header information and body content.
4. Edit the header information or body content, as needed. For details on the header fields, see [Adding a Content Library Page](#). For details on editing features, see the FlexWEB Author's Guide.

## Viewing Statistics for a Content Type

Each individual content type listed in the Content Library has statistics available to it. The statistics shown are broken down into categories, including general statistics, popularity, viewers by month, views by month, and views by day. You can view these statistics online or print them out to share with site users or managers.

To view statistics for a content type:

1. Open the Content Library module in the Site Administrator panel.
2. Locate the desired Content Type and then click the **Show Report** button to the right side in this section of the Content Library. This will bring up the statistics for the selected item.



There are five tabs in this window, which open the following statistical reports. All of these reports pertain to a specific category of information and a specific time period, which you can specify using the **Categories** and **Date Range** controls at the top of the window. By default, these reports do not include the page hits caused by administrators viewing the site. You can turn off this feature using the **Exclude Hits by Admin** checkbox.

Report	Purpose
Summary	An overview of user traffic on your web site, including the average number of page views per month over the last year, the average views by day of week, and the average views by time of day. These statistics are further subdivided into total views, views by site members, and views by the general public – as indicated using color-coded bar charts.
Popularity	A list ranking the most popular articles in the Content Library, showing the average ratings and number of raters (if the ratings feature is enabled), plus the number of times they were viewed by site members, the general public, and all users.
Viewers by Month	A listing by month, showing the total site visitors each month in the following categories: site members, general public, all visitors.
Views by Month	A listing showing the number of pages viewed each month during the specified time period, including pages viewed by site members, pages viewed by the general public, and all views.
Views by Day	A listing showing the number of pages viewed each day during the specified time period, including pages viewed by site members, pages viewed by the general public, and all views.

3. Click the **Print** button if you want to print this report for general distribution. This brings up the standard Print dialog box, which lets you direct the report to any available local or network printer.

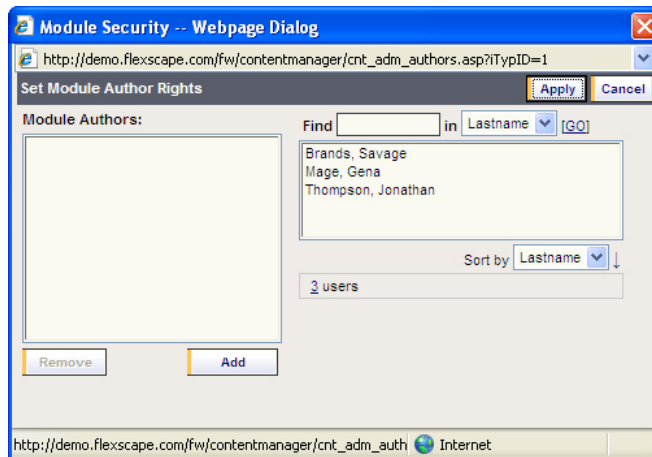


## Setting Author Rights for a Content Type

The Content Library feature allows you to limit authorship rights for each content type. For example, you may want press releases to be handled only by authorized users in the Marketing Department, and job listings to be edited only by authorized users in the Human Resources Department.

To set authorship rights for a content type:

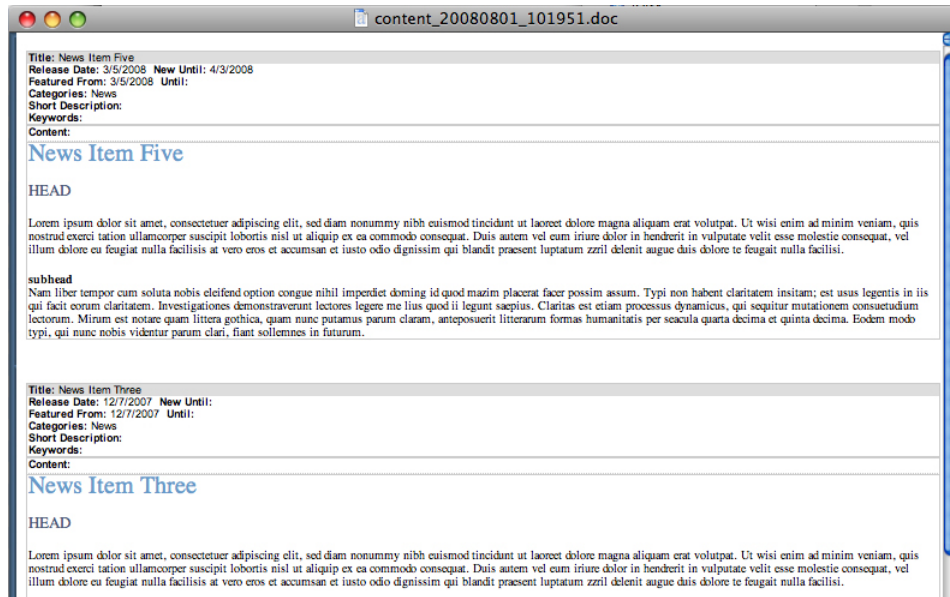
1. Click the **Content Library** icon in the Site Administrator panel. This displays the Content Types window.
2. Locate the desired Content Type and then click the **Set Authors** button for that content type. This opens the Set Module Author Rights dialog box, showing the currently approved list of authors (left side) and the list of available users (right side).



3. Take the appropriate action below:
  - To add access rights for a new author, select the name from the list on the right and then click the **Add** button to add it to the list of **Module Authors**.
  - To remove access rights for an existing author, select the name to be removed from the Module Authors list and click the **Remove** button.
4. When you are finished setting access rights, click the **Apply** button to close this dialog box.

## Exporting Articles to Microsoft Word

The Content Library feature allows you to export all the articles in a content type to a single Microsoft Word document. The following illustration shows how a typical export document will look:



To export articles:

1. Click the **Content Library** icon in the Site Administrator panel. This displays the Content Types window.
2. Select the desired Content Type by clicking on the title. This displays a list of all articles for this content type.
3. Click the **Export All to MS Word** link, at the upper right edge of the window. This opens a standard Windows dialog box, asking whether you want to open or save the MS Word file.
4. Click **Open** if you want to view the file and print it, or **Save** if you want to save it to a local or network drive for archiving or other purposes.

## Publishing Content and Directories

Once articles are added to the Content Library, you can publish individual articles, lists of available articles, or Content Library search forms. Content publishing is done by adding a new page to the web site and inserting the appropriate Content Library module using the **Insert FlexWEB module** selection on the page editing toolbar.

Module Type	Purpose
Page Content Module	Copies content of another page on this site into the current page.
Content Library - Content Item List	Inserts a list of articles from the Content Library. The list can be filtered and sorted in various ways.
Content Library - Category List	Inserts a list of categories defined in the Content Library. The list can be filtered and sorted in various ways.
Content Library - Content Archive	Inserts a list of articles from the Content Library that have expired. You can select from the list of categories of archived articles to display.
Content Library - Show Content	Inserts the full text of a selected article from the Library.
Content Library – Search	Inserts a set of search fields that allow you to easily search the Content Library from the current page. The search can be limited to a specific category or set of articles.

See the FlexWEB Author's Guide for detailed instructions on how to use each of the Content Library web publishing modules.

## Deleting an Article

Once an article has been added to the Content Library, you may continue to store it there for an indefinite period. In some cases, however, you may want to delete articles that are out-dated or no longer useful.

### To delete an article:

1. Click on **Content Library** from the Site Administration tree. This opens the Content Type window, which provides a list of the content types in your library.
2. Click on the Content Type that the article is stored under. This displays a list of the current articles for the selected content type.
3. Click the title of the article to open the article detail page.
4. Click the **Delete** button. You will see a message asking to confirm the deletion.
5. Click on **Yes** to delete the article.



## Chapter 5

# Surveys

## Understanding Surveys and Polls

FlexWEB includes an incredibly powerful survey management feature that gives authorized users the ability to create, manage, and analyze surveys and polls within the web site.

- **Surveys** are an excellent way to gain feedback from site visitors through an extensive list of question types that can include multiple-choice, fill in the blank, scaled ratings and more. Survey results are not widely published, but instead are typically limited to viewing by authorized users. Surveys can be set up so that administrators know who the respondents are or set up for users to choose to take the survey anonymously or include their name.
- **Polls** typically contain a list of questions with detailed results that can be displayed immediately to the participating users. Authorized administrators can also drill down into the responses and see how each question was answered by individual users.

The survey designer has complete control over both the questions and how the surveys are answered. The responses can be either public or private. Surveys and polls can have an “active date range” which controls when they will be available to the intended audience. Survey results can be viewed in real-time and printed or exported for other uses.

## Managing Existing Surveys

FlexWEB allows authorized users to view a list of all surveys and polls as they are collected in real-time. You can print the survey results or export them to spreadsheet files. You can also print out survey forms on paper for distribution and completion offline, and then enter the data from the forms into the system.

To view, analyze, and manage the current surveys:

1. Click on **Surveys** from the Site Administration tree. This opens the Available Surveys window. For each survey or poll in this list, you will see the following information:

Column / Field	Purpose
Name	The name of the survey.
Type	The type, which can be either Survey or Poll.
Published on Page	The title(s) of the web page(s) on which this survey is currently published.
#Submissions	The total number of recorded responses to the survey.
Last Response	The date and time of the last user response to the survey.
Active from/to	The date range during which this survey will be accessible to users.

2. Click the Name to view up-to-the-minute results for a specific survey or poll. This displays the Main Report for the survey or poll.
3. Use the **Survey Menu** at the upper left to view other report types and access other functions as desired. The following table defines all the report types:

Menu Option	Purpose
Main Report	This is a summary report showing the overall responses to each question in the survey or poll.  For detail on how each user responded to each question, click on the question. This displays the Responses to Question by User screen, with the survey question/results repeated at the top, and a detailed list of user responses below. For large surveys, a Find field at the top lets you search for a specific user.
Report by Users	This report provides a general list of the users who responded to the survey or poll. You can click on individual users to see that user's exact response to each question.

Menu Option	Purpose
Manual Data Entry	If required, you can enter survey results manually, in special cases such as when copies of a survey have been printed and completed on paper. This option brings up a list of users. Select the user and click <b>OK</b> if the respondent signed the form. If a user submitted the survey form anonymously, click the button <b>Take Survey as Anonymous User</b> . FlexWEB displays the survey questions and allows you to answer them directly, on behalf of the named or anonymous user. Click the <b>Submit</b> button when you are finished answering the survey questions.
Make Prints	This displays the survey questions in a printable format for those who prefer to respond offline. The form includes a blank where the respondents can enter their name and date of response. Use the <b>Print Now</b> button to send the survey form to a local or network printer.
Test This Survey	This displays the online survey form for general testing purposes. Respond to each question and then click the <b>Submit</b> button.
Back to List	This returns you to the Available Surveys window, displaying the entire list of current surveys and polls.

- To export the survey results to a spreadsheet, click one of the following links and then click **Open** if you want to view the report immediately, or **Save** if you want to save it to a local or network drive:

Option	Purpose
Export Summary	This produces a spreadsheet containing a summary of the survey/poll results, along with user responses.
Export Detail	This produces a spreadsheet arranged by user, containing the detailed responses for each user.

- Click the **Print Report** link at the upper right to print the survey results. This displays the standard Print dialog box, which you can use to send the report to a local or network printer. In your browser's Internet Options, you must have Print Background Colors and Images checked under the Advanced tab to get all the color charts in the survey report to print.
- To go back to the Available Surveys page, select **Back to List of All Surveys** from the Survey Menu dropdown menu.

## Changing an Existing Survey

Authorized users can change an existing survey at any time. This includes changing the survey name, type, the active dates, survey header text, and individual questions.

**NOTE:** Before changing an existing survey, you should take into account whether the survey is currently published and active. Changing a question in the middle of an active survey period may produce confusing results.

### To change an existing survey:

1. Click on **Surveys** from the Site Administration tree. This opens the Available Surveys window.
2. Click on the **Edit Survey** icon located next to the survey name.
3. Make entries and selections as shown in following table:

Field or Selection	Purpose
Survey Name	Enter the desired name of the survey/poll.
Survey Type	Select the desired type: either Survey or Poll.
Display From... through	Enter or select the desired date range, which determines the length of time the survey will be available on the site.
Submission Options	Select the desired submission option, which determines the number of times a user can submit survey responses and whether or not the user can change an answer.
Survey Header Text	Enter the desired text to display at the beginning of the survey, such as instructions.
Add a New Question	Click if you want to add new questions. See <a href="#">Creating a Survey</a> for details on adding questions.
Copy Questions	Click if you want to add a question to the current survey by copying it from some other survey. This displays a special screen, which allows you to select the survey, then all the questions to be copied from it. Once you have selected the questions to be copied, click the <b>Copy Selected Questions</b> button.
Del / Edit / Move	Use one of these options if you want to delete a question, edit a question, or move it higher/lower in the list. If editing a question, refer to <a href="#">Configuring Individual Questions</a> for details on the proper entries for each question type.
Survey Footer Text	Enter the desired text to display at the bottom of the survey, such as special notes or footnotes.
Completion Message	Enter the desired message for the user to see after completing the survey.



4. Once you have made all the changes, click the **Save Survey** button to save your changes.
5. Click the **Done** button when you are finished to close this window and return to the Available Surveys window.

## Creating a New Survey

FlexWEB provides an extensive list of survey design features which you can access using the Add New Survey button.

To add a new survey:

1. Click on **Surveys** from the Site Administration tree. This opens the Available Surveys window.
2. Click on the **Add New Survey** button located at the upper right corner of this window. This opens the Create Survey window.
3. Make your desired entries and selections as follows:

Entry	Purpose
Survey Name	Enter the name of the survey/poll.
Survey Type	Select <b>Survey</b> if you want the results to be unpublished or <b>Poll</b> if you want survey users to be able to immediately view the results online.
Display From ... through	Enter or select a beginning and ending date for the survey. This determines the length of time the survey will be available on the site.
Submission Options	Select the desired Submission Option, which determines how often users can take the survey, and whether or not users can change their answers.
Survey Header Text	Enter any text that you want to display at the top of the survey form, such as the survey instructions.
Survey Footer Text	Enter any text that you want to display at the bottom of the survey form, such as special notes or footnotes.
Completion Message	Enter the message that you want the user to see after submitting a survey.

4. When you are finished with the basic survey specifications, click the **Save Survey** and **Add Question** button. This saves the survey and opens the Add Survey Question page.
5. Select the Type of question that you want to add.

Question Type	Used For
Select only one [vertical] Select only one [horizontal] Select only one [pull down list]	Multiple choice questions in which the list of choices is displayed as a vertical, horizontal, or pull-down list and only one answer is allowed.
Select only one [selection matrix]	A group of multiple questions, for which all of the questions have the same set of possible answers; one answer per question.
Check all that apply	A checklist, in which the user can select multiple answers.
Numeric rating [selection matrix]	One or more questions, for which the user can supply a rating on a scale (e.g., 1 to 5).
Percentage [rating 0–100%] Percentage [all q's total 100%]	One or more questions, or any list for which the user must supply a percentage, either on a scale of 1 to 100 percent, or totaling 100 percent for the group.
Text response [multi line] Text response [single line] Name Field, E-mail Field	Questions for which the user can type in an answer as free-form text, such as a single-line comment, a multi-line comment, a name, or an e-mail address.
Section Header/Title of Comment [not a question]	A random heading, instruction, or comment inserted at any point in the survey form. Can be moved, once inserted.

The following table provides a summary of the available question types. See [Configuring Individual Questions](#) for more details on each question type.

6. Fill in the blanks for the selected question, as described under [Configuring Individual Questions](#). For individual Question and Answer fields, you can run a full-featured spell checker by clicking the **Run Spell Checker** link.

- When finished, click on the **Save Question** button. This adds the question to the Survey Form.

You can add more questions or change the existing line-up by using any of the following options:

Option	Purpose
Add a New Question	Click if you want to add new questions. See <a href="#">Creating a Survey</a> for details on adding questions.
Copy Questions	Click if you want to add a question to the current survey by copying it from this or some other survey. This displays a special screen, which allows you to select a survey, then all the questions to be copied from it. Once you have selected the questions to be copied, click the <b>Copy Selected Questions</b> button.
Del / Edit / Move	Use one of these options if you want to delete a question, edit a question, or move it higher/lower in the list. If editing a question, refer to <a href="#">Configuring Individual Questions</a> for details on the proper entries for each question type.

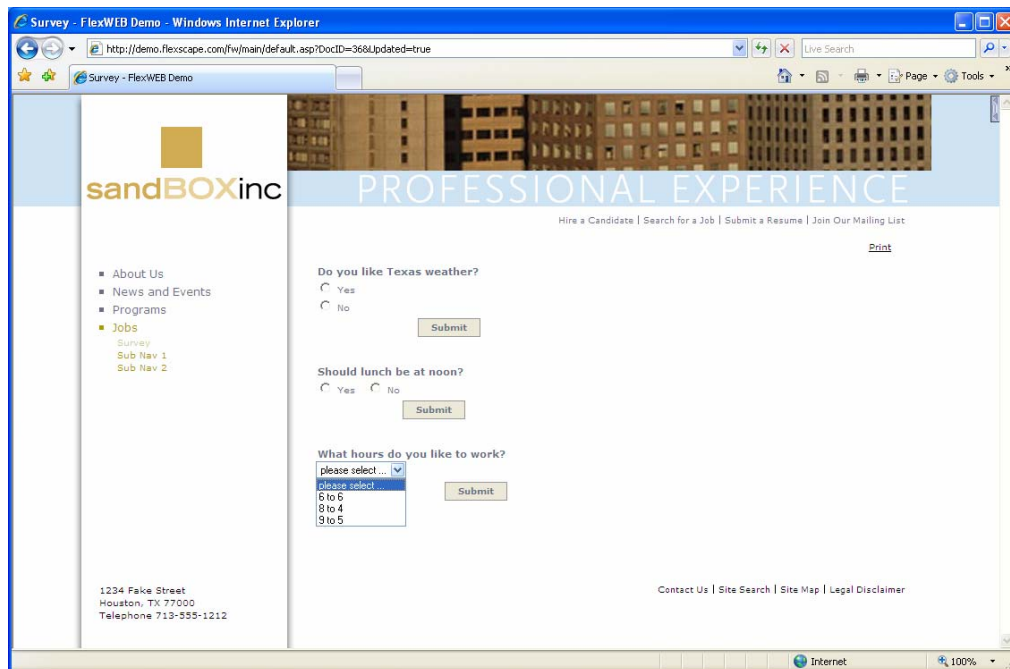
- Once you have finished creating the survey, click the **Save Survey** button to save your changes.
- Click the **Done** button to close this window and return to the Available Surveys window.

## Configuring Individual Questions

The following Survey Types are reviewed below with a description of their purpose.

- Select only one [vertical]
- Select only one [horizontal]
- Select only one [pull down list]

These are multiple choice formats in which the list of choices is displayed accordingly, and only one answer is allowed.

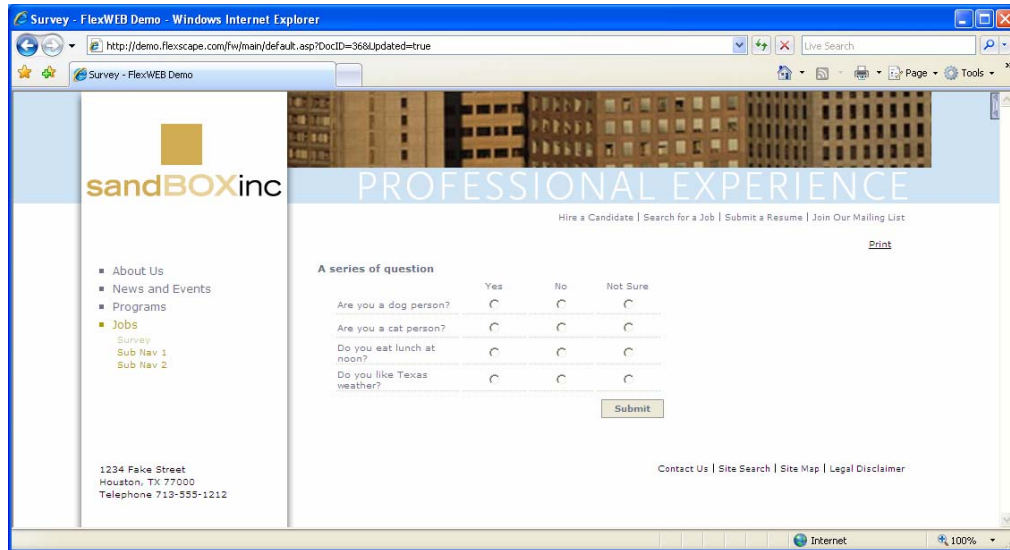


To configure this question properly, you will need to make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Question	Enter the text of the question, as you want it phrased to the user.
Possible Answers	Enter all of the possible answers, with one answer per line.
Answering this question is required	Check this box if you want to require the user to answer this question.
Add a comment field	Check this box if you want the user to be able to submit additional comments with this answer.
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Select only one [selection matrix]

This is a group of multiple questions, for which all of the questions have the same set of possible answers, such as **Yes**, **No**, and **Not Sure**. When taking the survey, the user can select only one of these answers for each question.

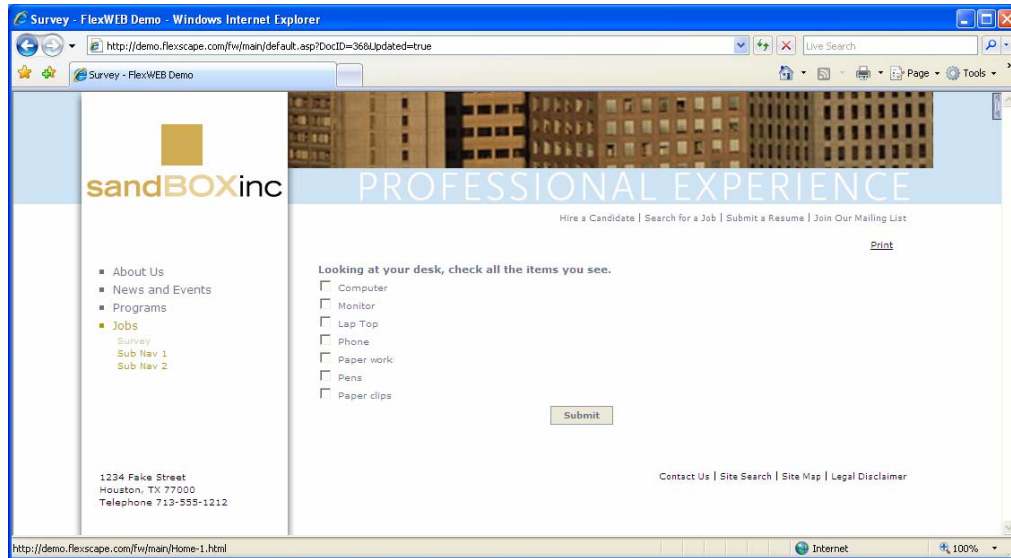


To configure this question properly, you will make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Section Header / Legend	Enter a heading or brief instructions for this group of questions as desired.
Questions	Enter the list of questions, as you want them phrased to the user. One question per line.
Possible Answers	Enter all of the possible answers, separated by commas.
Answering this question is required	Check this box if you want to require the user to answer this question.
Add a comment field	Check this box if you want the user to be able to submit additional comments with this answer.
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Check all that apply

This is a multiple choice format, in which the user can select multiple answers. Each answer will have a check box next to it, which the user can turn on or off to make selections. You can specify a minimum or maximum for the number of boxes that can be checked.

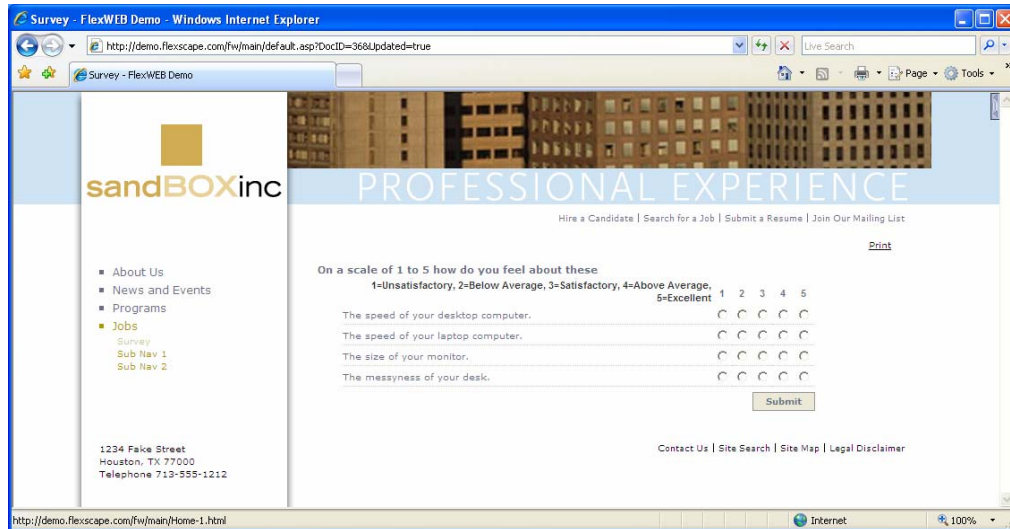


To configure this question properly, you will make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Question	Enter the text of the question, as you want it phrased to the user.
Possible Answers	Enter all of the possible answers, with one answer per line.
Selection of at least...	If desired, you can specify a minimum and/or maximum for the number of boxes that can be checked. The program will enforce these requirements as entered.
Answering this question is required	Check this box if you want to require the user to answer this question.
Add a comment field	Check this box if you want the user to be able to submit additional comments with this answer.
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Numeric rating [selection matrix]

This is a question, or a list of questions, for which the user can supply a rating on a scale of 1 to 5, 1 to 10, or any numeric scale that you desire.



To configure this question properly, you will make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Section Header / Legend	Enter a heading or brief instructions for this group of questions, as desired.
Questions	Enter the question or a list of questions, as you want them phrased to the user. One question per line.
Rating Range	Enter the beginning or ending values for the ratings scale, such as 1 to 5. If you use zero as the beginning value, it will be counted as “no response.”
Column Titles for Values	Provide a description for each number in the ratings scale, in the format “1=<description 1>, 2=<description 2>, n=<description n>.”
Display Titles as	If you select <b>Legend</b> , the rating descriptions will be published as a separate legend. If you select <b>Column Header</b> , the ratings scale will be displayed as a matrix with the descriptions across the top.
Answering this question is required	Check this box if you want to require the user to answer this entire set of questions.
Add a comment field	Check this box if you want the user to be able to submit additional comments with this group of ratings.

Entry	Purpose
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Percentage [rating 0-100%]

### Percentage [all question totaling up to 100%]

This is a question, or a list of questions, for which the user can supply a value as a percentage on a scale of 1 to 100 percent. In the first version (rating 0-100%), the user will be able to enter a number between 0 and 100 in a text box. In the second version (totaling 100%), the user will be able to enter a percentage number in a series of boxes, in which the total for all questions must be 100%.

To configure this question properly, you will make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Section Header / Legend	Enter a heading or brief instructions for this group of questions, as desired.
Questions	Enter a question or a list of questions, as you want them phrased to the user. One question per line.
Answering this question is required	Check this box if you want to require the user to answer this entire set of questions.
Add a comment field	Check this box if you want the user to be able to submit additional comments with this group of ratings.



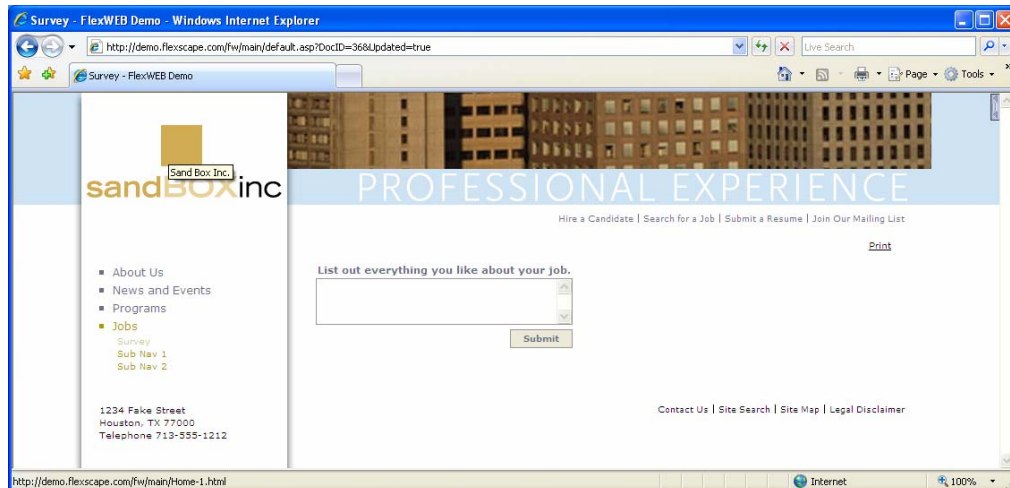
Entry	Purpose
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Text response [multi line]

## Text response [single line]

## Name Field, E-mail Field

These are all questions for which the user can type in an answer as free-form text. All question types supply a single-line text field for the response, except the “multi-line” option, which supplies a text box that allows multiple lines of text to be entered. In the case of the Name and E-mail field, the survey form validation will expect the user to reply with a full name or e-mail address.



To configure this question properly, you will make the following entries or selections on the Add Survey Question panel:

Entry	Purpose
Questions	Enter the question, as you want it phrased to the user.
Answering this question is required	Check this box if you want to require the user to answer this question.
Insert a page break after this	Check this box if you want to add a page break immediately after this question on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Section Header/Title of Comment [not a question]

This feature is used to insert a random heading or comment into the survey form. Once inserted, this object will appear as a separate item in the list of survey questions, and can be moved to a higher or lower position in the question list.

Entry	Purpose
Enter text	Enter the header or comment that you want inserted into the survey form.
Insert a page break after this	Check this box if you want to add a page break immediately after this text on printed versions of the survey form. This also means that the survey will only display the questions above the page break when viewing, and there will be a next button to view the remaining questions.

## Publishing a Survey

Once a survey has been created, you can publish it at any time. Survey publishing is done by adding a new page to the web site and inserting the Survey module using the Insert FlexWEB module selection on the page editing toolbar. See the FlexWEB Author's Guide for complete details. If a survey is inserted on a page that requires a user to login, then you will know who responds, but if a survey is inserted on a public page, then users have the option to take the survey anonymously or include their name.

## Deleting a Survey

Once a survey period has expired you may continue to store the survey for future use and reference in your survey library, or you can delete it.

### To delete a survey:

1. Click on **Surveys** from the Site Administration tree. This opens the Available Surveys window, which provides a list of the current surveys in your library.
2. Click on the **Edit Survey** icon located next to the survey name. This displays the survey details in the Edit Survey window.
3. Click the **Delete Survey** button. You will see a message asking to confirm the deletion.
4. Click on **Yes** to delete the survey.

## Chapter 6

# Discussion Groups

## Understanding Discussion Groups

FlexWEB includes a discussion group management feature that gives authorized users the power to create and manage discussion groups.

A **discussion group** is a web application that allows users to post messages to a central discussion group page, typically devoted to a specific topic. Subsequent users may then post their own message in response to the current set of messages. In this manner, the entire set of messages and responses is displayed so that users can view and participate in the ongoing discussions. Typical uses for a discussion group include:

- Post opinions, observations, or comments on a specific topic or issue
- Pose questions on a specific topic and get answers from other users
- Seek or provide advice and help.

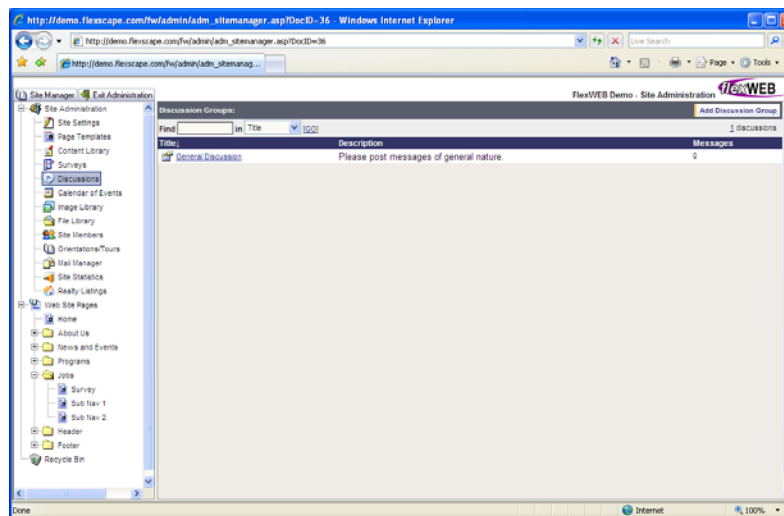
To facilitate use, posted messages can be configured so that the sender receives an e-mail notification each time someone replies to the message.

## Viewing and Managing Discussion Groups

The site administrator can view all discussion groups at a glance by opening the Discussion Groups main page. From here, he or she can view details of posted messages and remove or reply to specific messages.

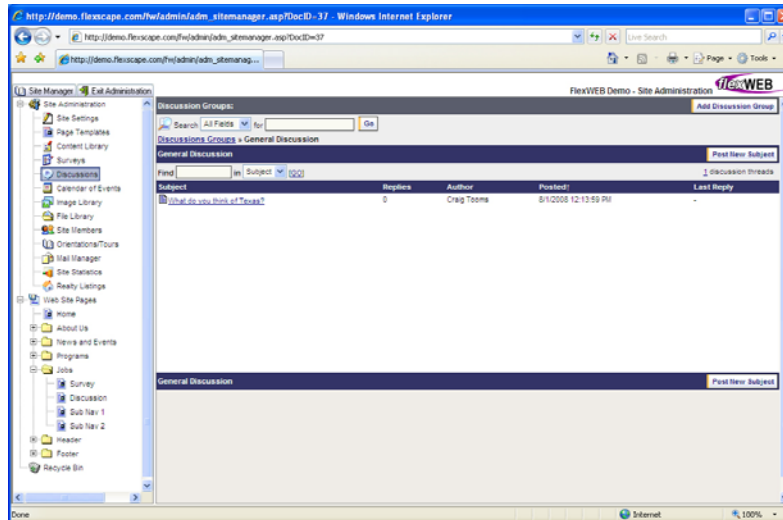
To view a current discussion group:

1. Click the **Discussions** icon under Site Administration in the Site Manager panel. This displays a list of all the current discussion groups available for your web site. For each group, you can see the Title, Description, and the number of Messages currently posted.

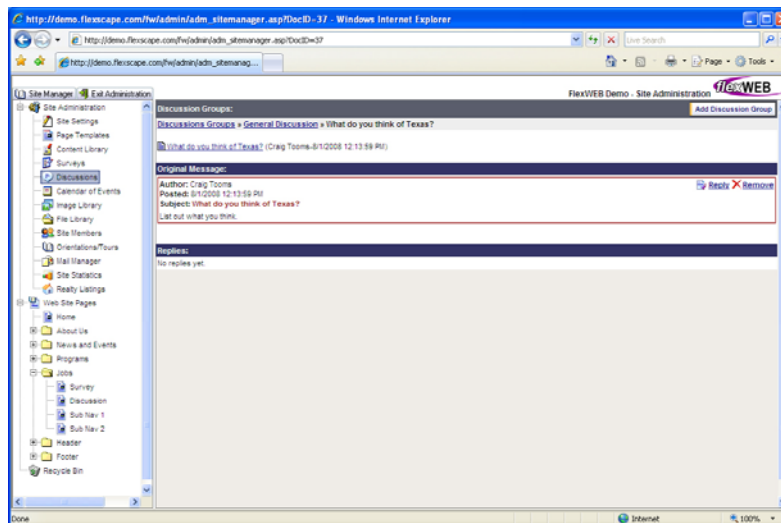


2. If the list is extremely long (more than one page), you can use the **Find** field to search for a keyword in the discussion group title, description, or in the posted messages. FlexWEB will display a list of discussion groups matching the specified keyword(s).

- Click on a Title to see the details for that discussion group. This displays a list of all the messages posted for the discussion group. Search fields allow you to search this list by subject, title, or the name of the person posting a message.



- Click on a Subject to see the details for that posted message. Special links allow you to **Remove** the message or **Reply** to it.



As you drill down into the details of a discussion group, the current level of detail is displayed in a navigation area at the top of the window, such as:

Home > General Discussion > Welcome

- Use the links in this navigation display to return to a higher level or to the main Discussion Groups window.

## Adding a New Discussion Group

Discussion groups are easy to set up and maintain.

### To set up a new discussion group:

1. Click on **Discussions**, under Site Administration in the Site Manager panel. This displays a list of all the discussions currently defined for your site.
2. Click the **Add Discussion Group** button located at the top of the page.
3. Make the following entries and selections:

Entry	Purpose
Title	Enter the desired name for the discussion group.
Allow automatic e-mail notification...	If checked, this will allow anyone posting a message to request an automatic e-mail notification when someone replies to the message as part of the discussion group.
Show _ messages per page.	Enter a number to set the maximum number of messages to display per page when the discussion group is published.
Description	Enter a short description explaining the purpose of the discussion. You can use the full set of FlexWEB authoring tools to format the description. See the FlexWEB Author's Guide for details on formatting.

4. When all information is entered click the **Create Discussion Group** button located at the top of the page. This returns the Discussion Groups main window, and adds the new discussion to the list of available discussion groups.

## Viewing and Changing Discussion Group Properties

Once a discussion group has been created, it is simple to view the discussion group properties and change them, as desired.

### To view or change discussion group properties:

1. Click on **Discussions** from the Site Administration tree. This opens the Discussion Groups window, which provides a list of the current discussion groups in your site.
2. Click on the **Discussion Group Properties** icon located next to the discussion group title. This displays the discussion group properties.
3. Make any changes desired, then click the **Save** button to save your changes.

## Publishing a Discussion Group

Once a discussion group has been created, users will not have access to the discussion group until someone publishes it on a web page. This is done by adding a new page to the web site and inserting the **Discussion Group** module using the **Insert FlexWEB Module** feature on the page editing toolbar. See the FlexWEB Author's Guide for complete details. NOTE: Only one discussion module can be inserted on a page.

## Deleting a Discussion Group

Even when not published, you may continue to store the discussion group in your library indefinitely, or you can delete it. Deleting a discussion group will cause all the messages associated with that discussion group to also be deleted.

**To delete a discussion group:**

1. Click on **Discussions** from the Site Administration tree. This opens the Discussion Groups window, which provides a list of the current discussion groups in your site.
2. Click on the **Discussion Group Properties** icon located next to the discussion group title. This displays the discussion group properties.
3. Click the **Delete** button. You will see a message asking to confirm the deletion.
4. Click on **Yes** to delete the discussion group.





## Chapter 7

# Calendar of Events

## Understanding the Events Calendar

The Calendar of Events Module is a special management area within Site Administration where authorized users can post events and schedules to a calendar. You can:

- Click on a day to add an event and fill in the start time, end time, and additional information including pictures
- Define standard event locations and categories, which can be used to group or classify information
- Synchronize the events calendar with your Outlook calendar
- Easily publish online calendars and event information.

## Viewing the Current Calendar of Events

The Calendar of Events window provides access to all of the features associated with event scheduling.

**To view the Calendar of Events:**

1. Click the **Calendar of Events** icon under the Site Administration tree. This will open the Calendar of Events window.
2. Use the following controls, as needed to view the calendar and event data:

Control	Purpose
Event category drop-down list	From the Calendar of Events dropdown menu, choose All Event Categories or a specific event category.
Event location drop-down list	From the Calendar of Events dropdown menu, choose All Event Locations or a specific event location.
Month / Year	Set these drop-down lists to the month and year that you would like to view.

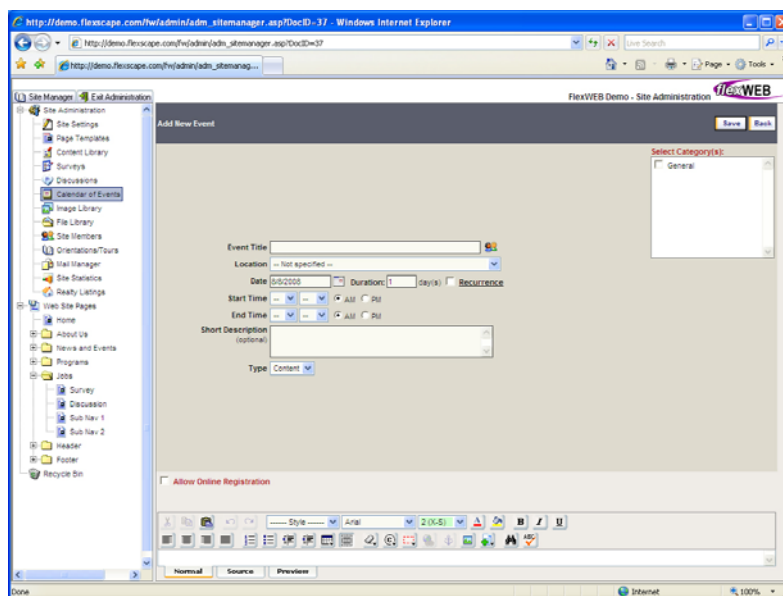
Control	Purpose
Day / Week / Month / Year	Click one of these options to change the calendar display to show events for today, this week, this month, or this year – respectively.
List All	Click this link if you would like to see all scheduled events listed in a table format. In this view, you can use the checkboxes provided to select events for deletion. A Find field lets you search for events that match a keyword in their event title, location, category, date, or time.
Edit Categories	This button lets you define and edit existing categories for the calendar.
Edit Locations	This button lets you define and edit existing locations for the calendar.
Print	Click to send the current calendar view to a printer.

## Adding an Event

Authorized users can add an event to the existing calendar. You can set the text style, add modules, and allow online registration for the event.

To add an event:

1. Click the **Calendar of Events** icon under the Site Administration tree. This will open the Calendar of Events window.
2. Locate the date on which you want to add the event, and then click the **Add New Event** icon in the upper left corner of the date box. This opens the Add New Event window.



## 3. Make the following entries or selections:

Entry	Purpose
Event Title	Enter the event name here. Existing names can also be selected by clicking on the “people” icon next to the Event Title field. This can be used as an easy lookup tool if your database is a list of clients or companies, so you can post events for them on the Calendar.
Location	Choose a location from the dropdown menu. If you do not see the desired location for the event, you will need to add it after creating the event, then return and edit the event to specify the new location. For details, refer to <a href="#">Adding or Changing Event Locations</a> .
Date	Enter or select the date for the event.
Duration	If the event will last more than one day, specify how many days the event is to last.
Recurrence	If the event will occur on multiple, non-contiguous dates, click this link to open a calendar window and select the days on which the event will occur.
Start Time / End Time	Enter the event start time, followed by the end time, and select either AM or PM.
Short Description	Enter a description for the event. This is an optional field.
Type	Select one of these two options from the dropdown list: <b>Content</b> – This article will serve as standard content within the Content Library. <b>Link</b> – Click on Pick URL. Then all your link options will appear. You can link the title of the article to other pages in your web site, to Events on the Calendar, to other Content Articles, to Files in the File Library and to other web sites or to an Email address.
Select Category(s)	Select an appropriate category for the event. If you do not see an appropriate category, you will need to add it after creating the event, then return and edit the event to specify the new category. For details, refer to <a href="#">Adding or Changing Event Categories</a> .
Allow Online Registration	When this is checked, it will allow people to sign up online from your web site.
(editing window)	You can use this area to enter extensive detail about the event, including text, photos, and other images. This editing area provides full formatting control for the event information. See the FlexWEB Author's Guide for details on creating formatted text and inserting images.

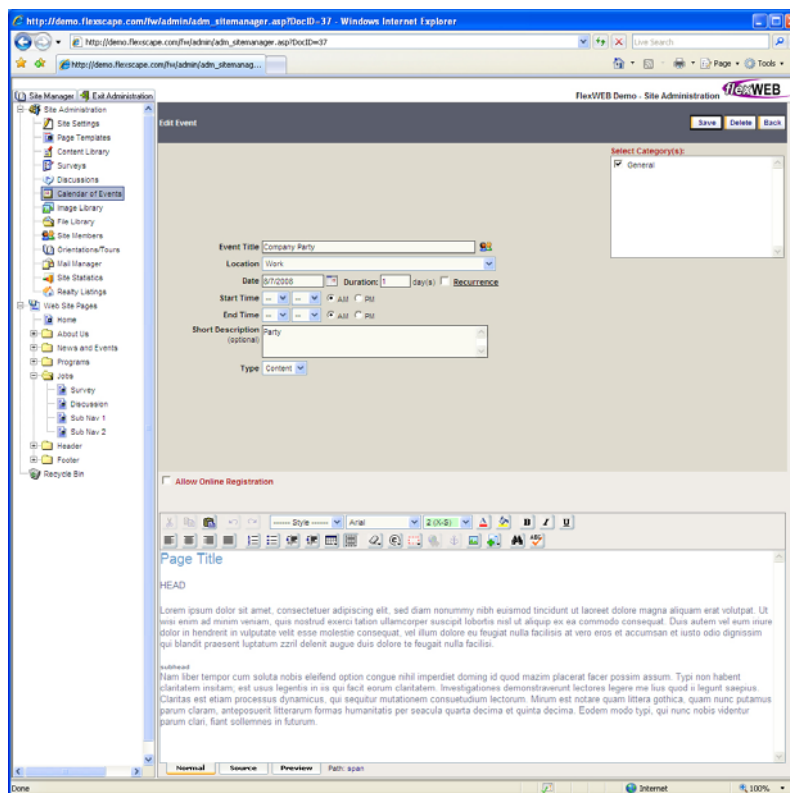
4. When finished, click the **Save** button located at the top of the page.

## Changing an Event

Authorized users can edit an existing event as needed, to add or correct details about the event.

To edit an existing event:

1. Click the **Calendar of Events** icon under the Site Administration tree. This will open the Calendar of Events window.
2. Locate the date on which the event is scheduled to occur, and then click the **Edit Event** icon to the left of the event title. This opens the Edit Event window.



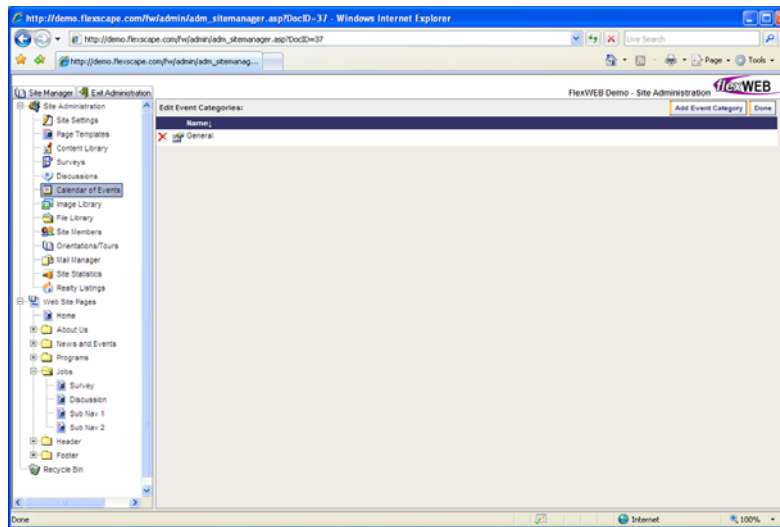
3. Make any changes required to the event information. For details on the purpose of each field, see [Adding an Event](#).
4. When you are finished making changes, click on the **Save** button located at the top of the page.

## Adding or Changing Event Categories

Whenever you create a new event, you can classify it as a member of a category, such as meetings, seminars, speeches, social gatherings, training, and so forth. The list is completely user-defined, so that you can organize and group events into any categories that you need for easier searching, listing, and publishing.

To add or change an event category:

1. Click the **Calendar of Events** icon under Site Administration in the Site Manager panel. This will open the Calendar of Events window.
2. Click the **Edit Categories** button located at the top right corner of the page. This will open the Event Categories page, listing all of the currently defined categories.



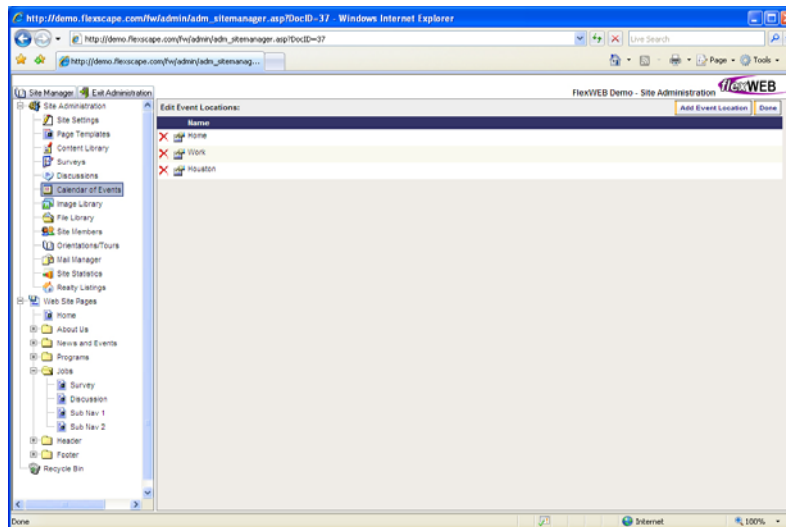
3. To add a new category, click the **Add Event Category** button, enter the new category name, and click the **Save Changes** icon. To change an existing category name, click on the **Edit Event Category Properties** icon next to the name, retype the name, and then click the **Save Changes** icon. To delete a category, click the **Delete** icon next to the category name.
4. Click the **Done** button when finished to return to the Calendar of Events.

## Adding or Changing Event Locations

Defining event locations is a necessary part of your scheduling workflow, so that you will be able to easily identify the locations where each event will take place. Typically, you will have a limited set of locations where events take place for your organization, and you may be able to easily enter all of the potential locations in one sitting. However, you can add new locations or change the existing locations anytime as needed.

To add or change an event category:

1. Click the **Calendar of Events** icon under the Site Administration tree. This will open the Calendar of Events window.
2. Click the **Edit Locations** button located at the top right corner of the page. This will open the Edit Event locations page, listing all of the currently defined locations.



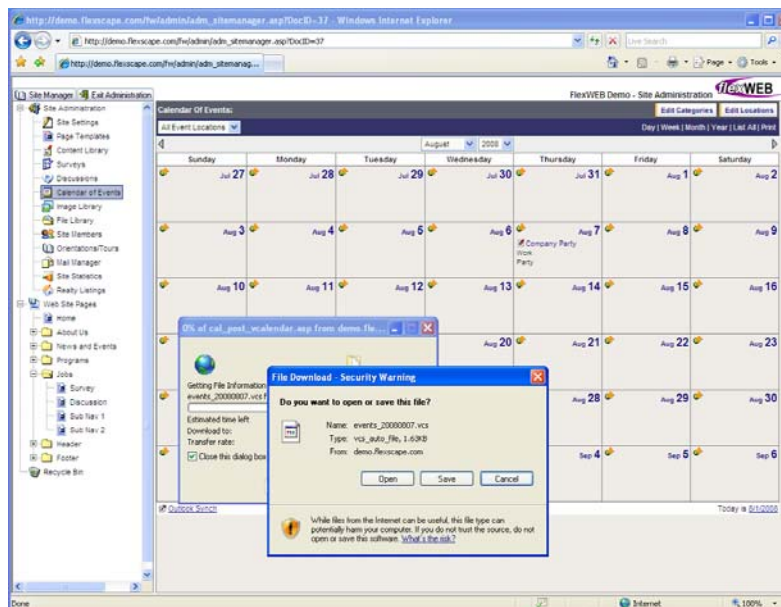
3. To add a new location, click the **Add Event Location** button, type in the new location name, and click the **Save Changes** icon. To change an existing location name, click on the **Edit Event Location Properties** icon, retype the location, and then click the **Save Changes** icon. To delete a location from the list, click the **Delete** icon next to the location name.
4. Click the **Done** button when finished to return to the Calendar of Events.

## Synching Events to Microsoft Outlook

This function allows the site administrator to export a file to the .VCS format, which can be imported into your Microsoft Outlook calendar. This allows you to e-mail and/or share the calendar listing with others.

### To do an Outlook Sync:

1. Click the **Calendar of Events** icon under the Site Administration tree. This will open the Calendar of Events window.
2. Select the calendar view that you want to export to Outlook: day, week, or month.
3. Scroll to the bottom of the calendar and click the **Outlook Sync** link. This opens a standard File Download dialog box.



4. Click the **Save** button to save the .VCS file to a local or network drive.
5. Import the file into Outlook or e-mail it to others for importing into Outlook.

## Publishing Events, Calendars, and Schedules

Once events are added to the calendar, you can publish calendars, lists of events, or individual event details on your site. Event publishing is done by adding a new page to the web site and inserting the appropriate Calendar module (see table below) using the Insert FlexWEB module icon on the page editing toolbar.

Module	Purpose
Calendar of Events	Displays a calendar of events on the current page.
Calendar - Upcoming Events	Displays a list of upcoming or past events on the current page.
Calendar - Upcoming 5 Days	Displays a calendar of events for a desired period of days (1-10).
Calendar - Show Event	Lists the details of a single event on the current page, and provides an editing link.

## Deleting an Event

Deleting a listed event is simple and can be accomplished in a few clicks.

To delete an event from the calendar:

1. From the Site Administration tree, click on **Calendar of Events**. This opens the Calendar window, showing all of the existing scheduled events.
2. Click on the **Edit Event** icon next to the event that you want deleted. This opens the Edit Event page.
3. Click the **Delete** button at the upper right corner of the Edit Event page. You will see a message asking to confirm the deletion.
4. Click on **Yes** to delete the event.

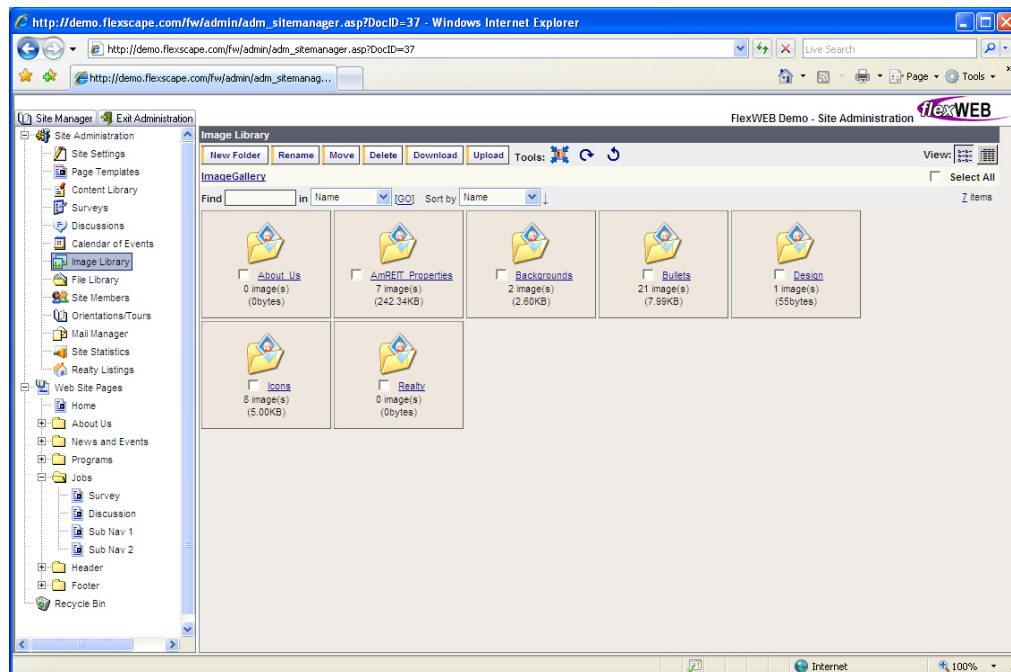


## Chapter 8

# Image Library

## Understanding the Image Library

The Image Library is a special management area within Site Administration where authorized users can store pictures and graphics.



The pictures are stored in folders that can be used to categorize different types of images. There are three types of folders:

- **\$My Personal Files.** This is a permanent folder reserved for your personal use, based on your login. This folder cannot be moved, deleted, or renamed.
- **\$Group Files.** This is a permanent, shared folder reserved for the members of a particular group, based on group definitions. This folder contains one subfolder for each defined group. Group folders cannot be moved, deleted, or renamed.
- **User-Defined Folders.** Any authorized user can add folders in the Image Library for use by everyone. These folders can be moved, deleted, or renamed. Users can also add subfolders to help categorize images.

Once images are uploaded to the Image Library, your web site authors can then insert the images into web pages by checking the box in the upper left hand corner of the image(s) and then clicking the **Use Selected** button in the upper right portion of the browser window. If the author inserts multiple images at once, the images will insert on the page stacked on top of each other. Authors can also insert one image at a time by double clicking on the image thumbnail. The image will be inserted on the page where the cursor was placed on the web page. See the Author's Guide for more detail on adding pictures to your web site.

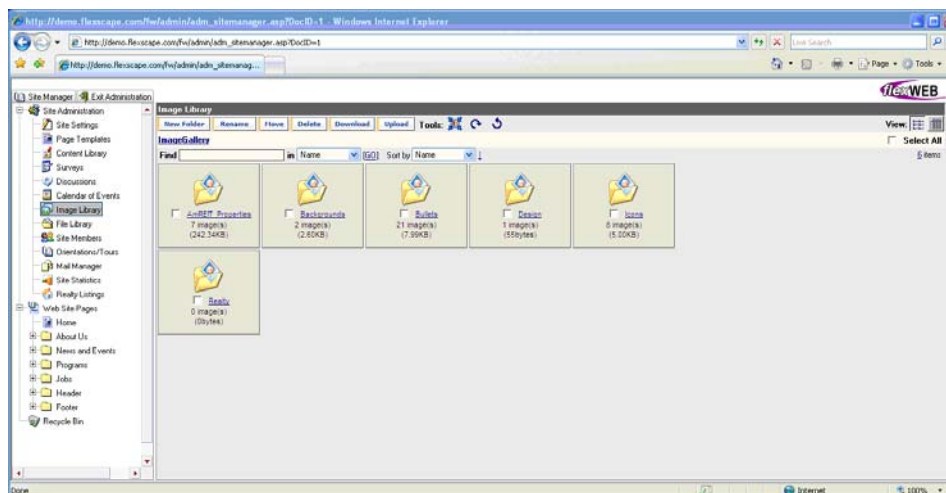
A built-in feature of the Image Library automatically resizes the large images to a more manageable file size and a smaller physical size for quicker loading and viewing of web pages. The default size for images is 800 px. However, users can change the images to any desired physical size. It is recommended to store the images in the Image Library at the largest possible size to use on the web site because you can always downsize an image once it is inserted on a web page. You can not make a smaller image larger without distorting the image. The Image Library supports an array of image file types, including .gif, .jpeg, .jpg, .bmp, and .png.

## Managing the Image Library

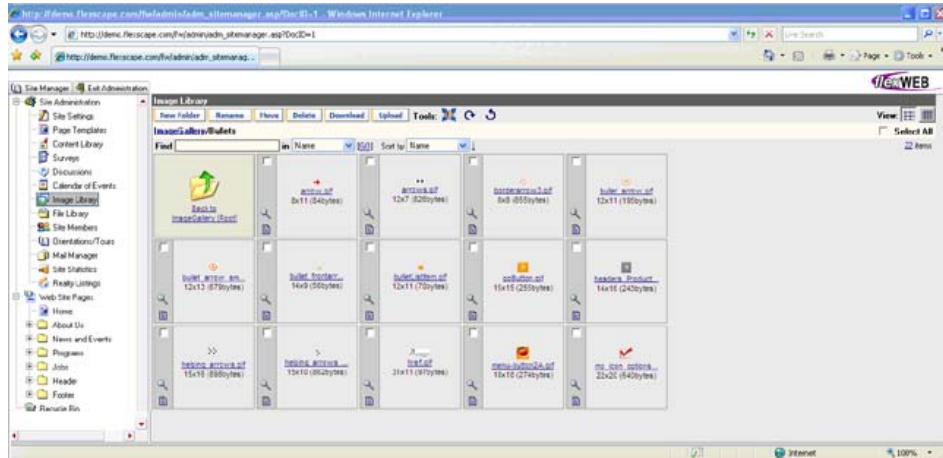
The Image Library is a top-level selection in the Site Administration area. When you open the Image Library, it displays all folders that hold the pictures and graphics.

To view and manage the Image Library:

1. Click the **Image Library** icon in the Site Administration area. This will open the “root” level of the Image Library, which typically contains folders, but which may also contain some image files.



- Click the title of a folder to view its contents. Each folder may contain a specific category of images, as well as other subfolders.
- When you are in a subfolder, you can click the **Back To** button to move up a level in the library structure.



- For large groups of folders or files, the following controls make it easier to locate the images you need:

Option	Purpose
View	Select the appropriate icon. You can view the files and folders as <b>thumbnail images</b> (default) or as a <b>detailed list</b> showing the filename, size, description, and date.
Find	Search the gallery by name, size, description, or date.
Sort by	Sort the gallery by name, size, description, or date.

- At any level (except when inside the **\$Group Files** folder), you can use the following options to manage the files and folders in the Image Library. Notice that some options require you to first select a folder or file by clicking the checkbox next to it. You can use the **Select All** checkbox to select all the available files and folders:

Option	Use
New Folder	Create a new folder to store a particular category of images.
Rename	Select the file or folder to be renamed and then type in a new name.
Move	Select the file(s) or folder(s) to be moved and then select a new location.
Delete	Select the file or folder to be deleted and then click <b>OK</b> to confirm deletion.
Download	Download a file from the Image Library to a local or network drive. See <a href="#">Downloading Images</a> for more details.

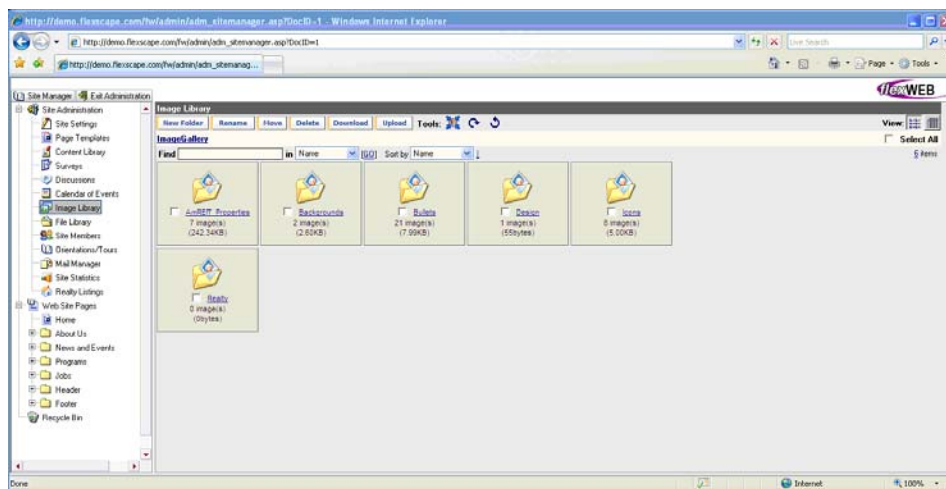
Option	Use
Upload	Upload an image file from a local or network drive, for storage in the Image Library. See <a href="#">Uploading Images</a> for more details.
Tools	Resize or rotate a selected image. See <a href="#">Working with Images Inside the Library</a> for more details.
Magnifying Glass icon	Click to see the image at its original size.
Text icon	Click to view or change the image description.

## Uploading Images

FlexWEB allows you to easily upload an image file from a local or network drive, for storage in the Image Library.

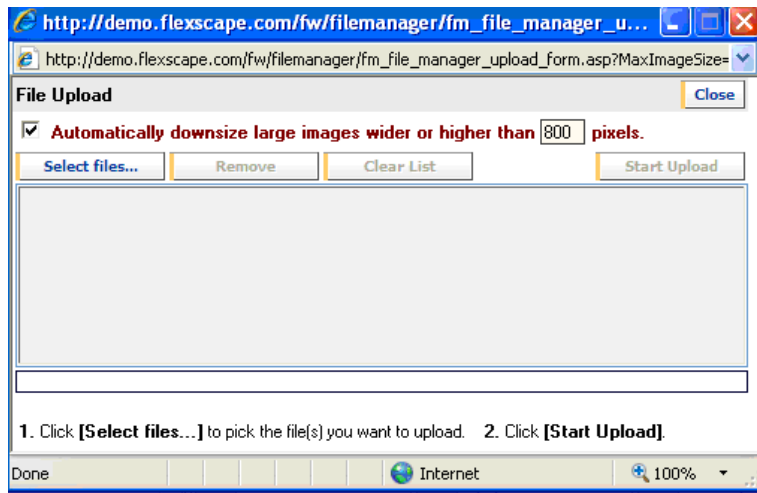
To upload a file to the Image Library:

1. Click the **Image Library** icon in the Site Administration area. This will open the Image Library.



2. Open the folder where you want the image to be stored in the Image Library.
  - If no appropriate folder exists, create a new folder using the **New Folder** button.
  - If you want the image to be available only for your own personal use, select the **\$My Personal Files** folder.
  - If you want the image to be available only for web authors in a certain defined group of users, select the **\$Group Files** folder, then select the subfolder assigned to the designated group.

3. Click the **Upload** button. This opens the File Upload dialog box.



4. Make the following selections:

Selection	Purpose
Automatically resize	<p>Exceptionally large images (typically those over 800 pixels), are not only larger than they need to be for most web publishing purposes, but may degrade the performance of your web site because larger file sizes take longer to load when a user views the page.</p> <p>Turn on this selection and FlexWEB will automatically resize your images to a more appropriate size. You can specify a maximum image size in pixels, or accept the recommended size. Any images exceeding the specified size, in either height or width, will be resized to this size on its longest edge, while maintaining the same aspect ratio to avoid distortion.</p>
Select files	<p>Click to select the files to be uploaded. This opens a standard Windows file selection dialog box to use to locate and select files. You can use this option repeatedly to continue selecting all the files that you want to upload during this session.</p> <p>To select multiple files in a list, you can click the first desired file, hold down the <b>Shift</b> key on your keyboard, and click the last desired file. All the files in between will be selected.</p> <p>To select only certain files in a list, hold down the <b>Ctrl</b> key on your keyboard and click each desired file.</p>
Remove	Click to remove selected files from the list if you queued multiple files to upload.
Clear List	Click to clear an entire list of files and start over if you have selected any files to upload.

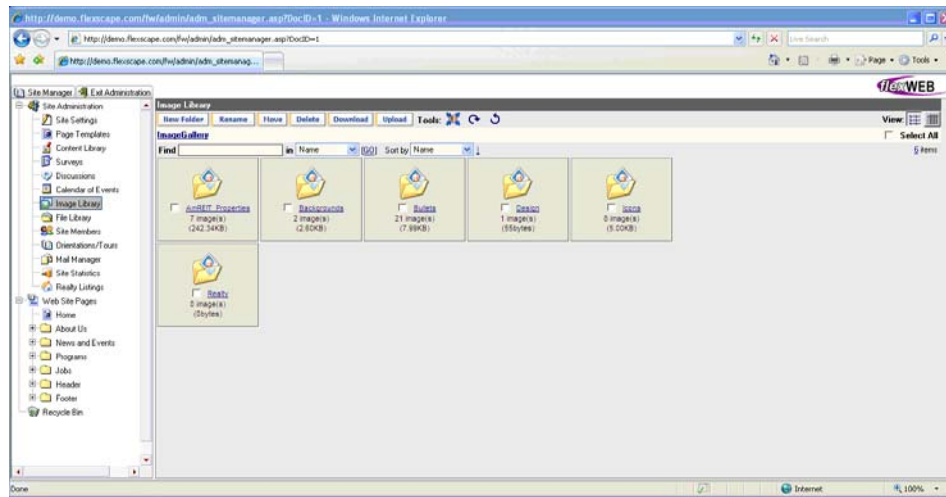
5. Click the **Start Upload** button when you are finished selecting all the files to be uploaded. This uploads the listed images into the selected folder. When the image(s) have finished uploading, the dialog box will close automatically.

## Downloading Images

FlexWEB allows you to easily download a file from the Image Library to a local or network drive.

To download a file from the Image Library:

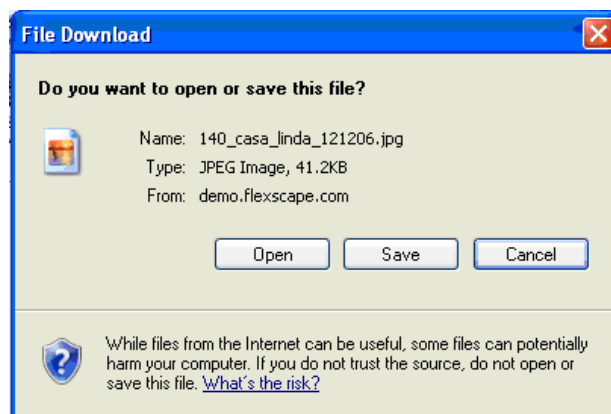
1. Click the **Image Library** icon in the Site Administration area. This opens the Image Library.



2. Open the folder where the image is located.
3. Select the file to be downloaded by clicking on the checkbox next to the filename.

**NOTE:** You can only download one file at a time. The **Select All** checkbox does not work in this context to download multiple files.

4. Click the **Download** button. This opens the File Download dialog box.



5. Click the **Save** button to save the file to a local or network drive. This opens a standard Windows file selection dialog box, which you can use to locate the local or network hard drive folder where you want to store the downloaded file.
6. Click the **Save** button on the file selection dialog box, once you have located an appropriate folder where you want to save the file.
7. When the download is finished, you will see the message **Download Complete**. Click the **OK** button to close this message.

## Working with Images inside the Library



Once you download images to the Image Library, you may find they are upside down or inappropriately sized for the web environment. You can examine the downloaded images in one of two ways:

- By default, you can see a small thumbnail view of each image stored in the Image Library. If the Image Library is set up as a file listing, you can change it to a thumbnail view by clicking the left **View** icon at the top right corner of the display.
- Click the **Magnifying Glass** icon next to the image filename to display the full-size image. This opens a separate viewing window. If the full-size image takes up more than about 80 percent of the screen size, it should be resized to a more appropriate size for web publishing.

It's a good idea to always check downloaded images for appropriate sizing and rotation. This will save the site authors a considerable amount of time and trouble when they try to use the images on their web pages.

### To resize or rotate an image:

1. Select the image(s) to be resized or rotated. If you want to resize or rotate all the images, click the **Select All** option at the top of the screen.
2. Use one of the following tools to manipulate the image.

Resize Tool 	Change the width and/or height in pixels. <b>Note:</b> The aspect ratio of width-to-height will be maintained, to avoid distortion.
Rotate Tool 	Rotate the image 90 degrees (a quarter-turn) left or right with each click. <b>Note:</b> If you rotate one image and then rotate another image in the same window, the first image will appear to not have rotated. Due to the limits of working in a web browser, the first image <i>appears</i> to have returned to its original position. The image will be correct (according to the rotation you executed) on the website.

## Publishing Images

Once images are stored in the Image Library, web site authors can easily insert them into web pages and resize them individually within the context of the web page.

Images can be inserted using the editing controls within the web page authoring environment. FlexWEB also provides a special Image Library module, which allows you to publish a photo gallery containing multiple images. For more details, see the FlexWEB Author's Guide.

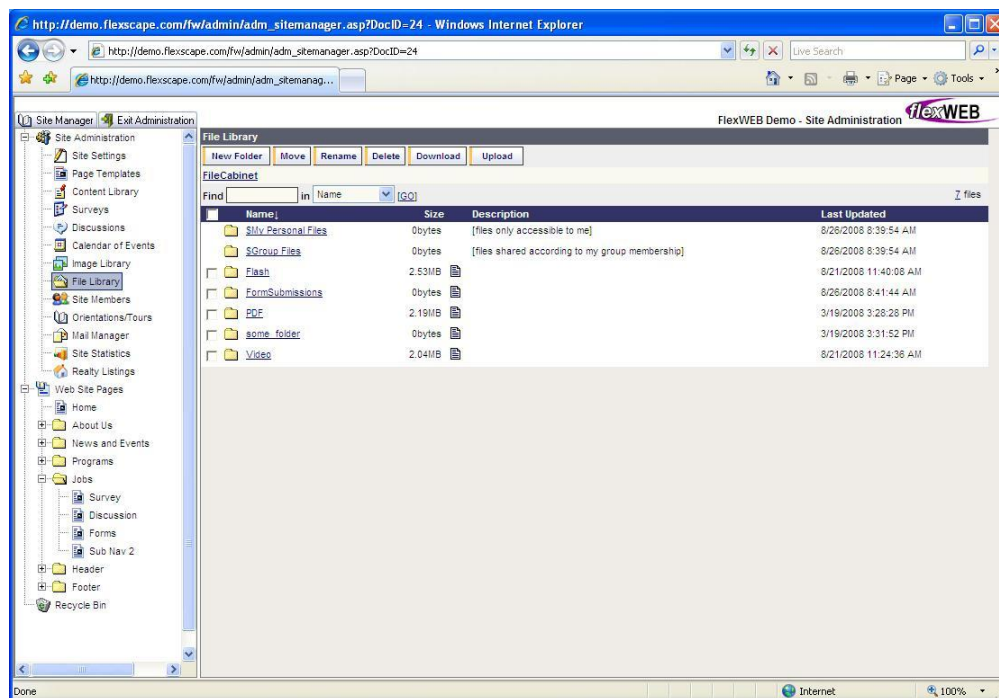


## Chapter 9

# File Library

## Understanding the File Library

The File Library is a special management area within Site Administration where you can store various documents that are not formatted for the web, but which you want to make available for download or viewing through the web site. These documents are typically stored in their native file formats, such as Microsoft Word (.doc), Adobe Acrobat (.pdf) files, and Microsoft Excel (.xls), and can be easily viewed by any site user who has the appropriate software installed. The File Library can also be used to store and serve common video file formats such as Windows Media Video (.wmv), Adobe Flash (.swf or .exe), and Moving Picture Experts Group (.mpg) files.



The files are stored in folders that can be used to categorize different types of files. There are several structures which appear in the File Library by default:

- **\$My Personal Files.** This is a permanent folder reserved for your personal use, based on your login. This folder cannot be moved, deleted, or renamed.
- **\$Group Files.** This is a permanent, shared folder reserved for the members of a particular group, based on group definitions. This folder contains one subfolder for each defined group. Group folders cannot be moved, deleted, or renamed.
- **User-Defined Folders.** Any authorized user can use or add to any of the other folders in the File Library. These folders can be moved, deleted, or renamed.
- **FormSubmissions.** This folder is used to store the results that are generated when users fill in forms on the site. For more details, see the description of the Forms Module in the FlexWEB Author's Guide.

Special controls allow you to upload new files into the File Library, download them to other locations, and manage them in various ways.

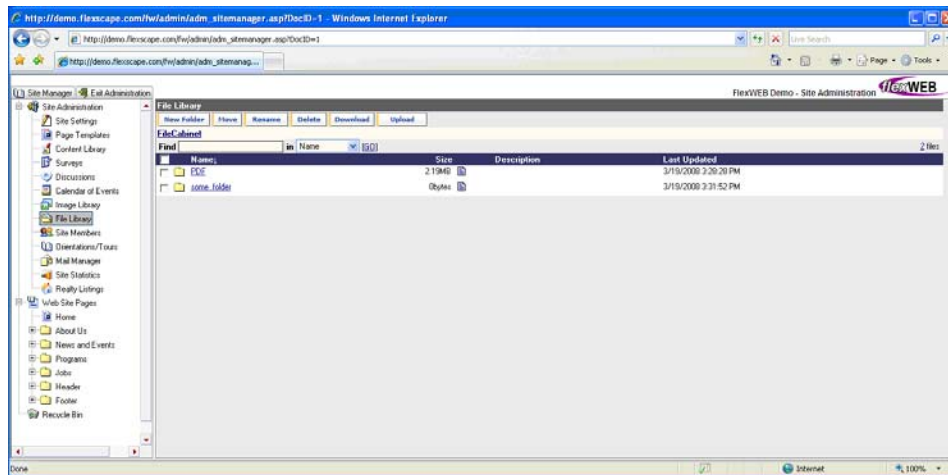
## Managing the File Library

When the File Library is first opened, you will see the “root level” of the library, which is the set of folders and files at the top level of the Library. From there, you can drill down into the personal, group, or user-defined folders to view or store more files.

The File Library offers a variety of ways to manipulate folders. You can create, rename, move, and delete them.

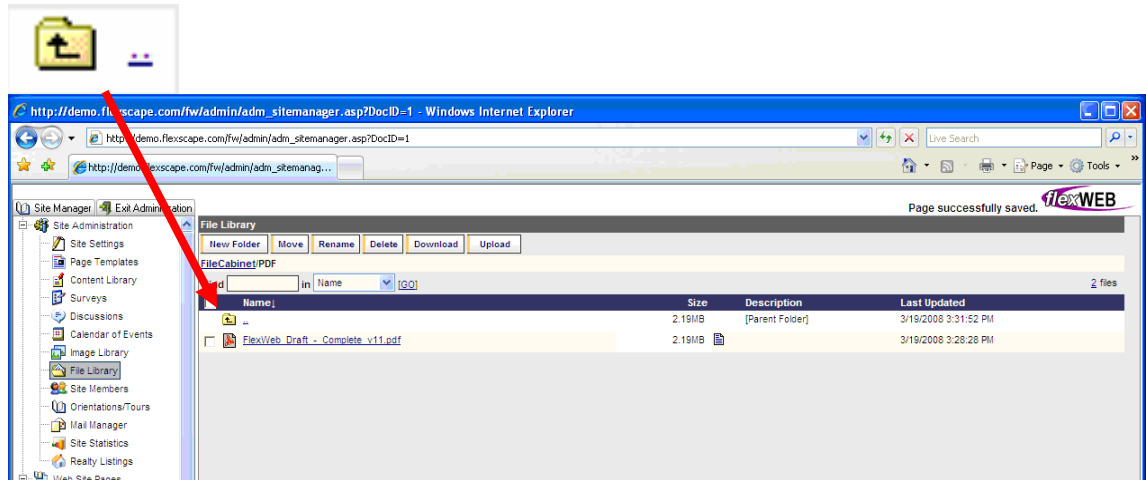
### To view and manage the File Library:

1. Click the **File Library** icon in the Site Administration area. This opens the “root” (top) level of the File Library, which typically contains folders, but which may also contain some individual files.



2. Click the title of a folder to view its contents. Each folder may contain a specific category of files, as well as other subfolders.

- When you are in a subfolder, you can click the **Back To** button to move up a level in the library structure.



- For large listings of folders or files, you can use the **Find** feature to search the list by name, size, description, or date.
- At any level (except when inside the \$Group Files folder), you can use the following options to manage the files and folders in the File Library. Notice that some options require you to first select a folder or file by clicking the checkbox next to it. You can use the **Select All** checkbox at the upper left corner of the listing to select all the available files and folders:

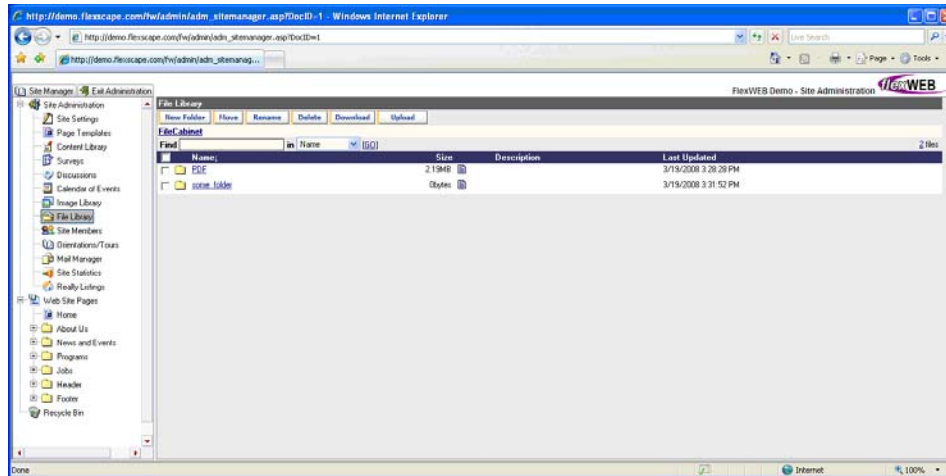
Option	Use
New Folder	Create a new folder to store a particular category of files.
Move	Select the file(s) or folder(s) to be moved and then select a new location.
Rename	Select the file or folder to be renamed and then type in a new name.
Delete	Select the file or folder to be deleted and then click OK to confirm deletion.
Download	Download a file from the File Library to a local or network drive. See <a href="#">Downloading Files</a> for more details.
Upload	Upload a file from a local or network drive, for storage in the File Library. See <a href="#">Uploading Files</a> for more details.
Text icon	Click to add or change the file or folder description.

## Uploading Files

FlexWEB allows you to easily upload a file from a local or network drive, for storage in the File Library.

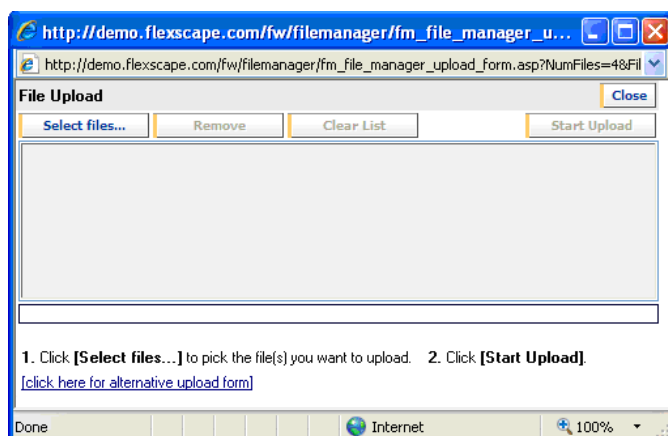
To upload a file for use in the File Library:

1. Click the **File Library** icon in the Site Administration area. This will open the File Library.



2. Open the folder where you want the file to be stored, within the File Library.
  - If no appropriate folder exists, create a new folder using the **New Folder** button.
  - If you want the file to be available only for your own personal use, select the **\$My Personal Files** folder.
  - If you want the file to be available only for web authors in a certain defined group of users, select the **\$Group Files** folder, then select the subfolder assigned to the designated group.

3. Click the **Upload** button. This opens the File Upload dialog box.



4. Make the following selections, as needed:

Selection	Purpose
Select files	<p>Click to select the files to be uploaded. This opens a standard Windows file selection dialog box, which you can use to locate and select the files. You can use this option repeatedly to continue selecting all the files that you want to upload during this session.</p> <p>To select multiple files from a list, you can click the first desired file, then hold down the <b>Shift</b> key on your keyboard and click the last desired file in the list. All the files in between will be selected.</p> <p>To select only certain files in a list, hold down the <b>Ctrl</b> key on your keyboard and click each desired file.</p>
Remove	Click to remove any selected file from the list once you have selected files to upload.
Clear List	Click to clear the entire list and start over.

5. Click the **Start Upload** button when you are finished selecting all the files to be uploaded. This uploads the listed files into the previously selected folder. When the files have finished uploading, the dialog box will close automatically.

## Downloading Files

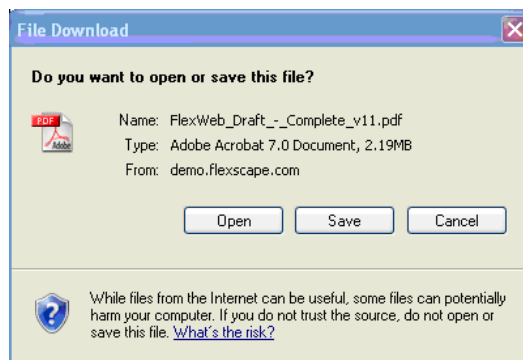
FlexWEB allows you to easily download a file from the File Library to a local or network drive.

To download a file from the File Library:

1. Click the **File Library** icon under Site Administration. This will open the File Library window.
2. Open the folder where the file is located.
3. Select the file to be downloaded by clicking on the checkbox next to the filename.

**NOTE:** You can only download one file at a time. The **Select All** checkbox does not work in this context to download multiple files.

4. Click the **Download** button. This opens the File Download dialog box.



5. Click the **Save** button to save the file to a local or network drive. This opens a standard Windows file selection dialog box, which you can use to locate the local or network hard drive folder where you want to store the downloaded file.
6. Click the **Save** button on the file selection dialog box, once you have located an appropriate folder where you want to save the file.
7. When the download is finished, you will see the message **Download Complete**. Click the **OK** button to close this message.

## Publishing the File Library

Once files are stored in the File Library, web site authors can easily publish a list that mimics the operation of the File Library on an individual web page. This list can show the root level of the File Library, or the contents of any individual subfolder. The published page can also include “upload” and “download” links that allow authorized users to upload files to the File Library, or download files from the File Library.

These features are made possible through the File Library module, which can be inserted using the editing controls available within web page authoring environment. For more details, see the FlexWEB Author's Guide.



## Chapter 10

# Site Membership

## Understanding Site Member Management

The Site Members area is a special management area within Site Administration where registration information is stored for site members and groups. It is divided into two main sections:

- **Members.** This section provides a list of all of the currently defined site members and lets you view the members their by primary or secondary relationship types, member groups, and their user status. The list of members shows the members' account ID, name, contact info, group membership, number of visits, and most recent visit. This list can also be exported to Word and Excel.
- **Groups and Account Types.** This section provides a list of all the currently defined groups and lets you set a hierarchy that determines which groups take precedence over others. The list of groups shows the group name, relative hierarchy, type, description, and home page (if assigned).

Groups must be defined by the site administrator or other similarly authorized users. Site member status can be defined in one of two ways:

- **Manual registration** by the site administrator from within this site administration area.
- **User self-registration** on an appropriate membership signup form, which has been published on the web site using the Member Registration Module (see FlexWEB Author's Guide for more details).

## Understanding Groups, Account Types, and Hierarchy

FlexWEB gives you more management control over your membership roster by allowing you to categorize and group members in a completely flexible way. This is done by defining specific member **groups** and **account types**, which can then be used to classify members.

The difference between groups and account types is simply this: A member can be assigned to only *one* account type at a time, but can be assigned to *multiple* groups.

### Example:

If your organization is a country club, the account types could be membership categories geared to real world account types, such as "Social Membership," "Golf Membership," or "Dining Membership," while groups might be event-driven or interest-related categories such as "Fundraisers," or subcategories of account types such as "Ladies Golf" (for Golf Memberships) or "Sunday Brunchers" (for Dining Memberships).

The concept of hierarchy arises when a user belongs to more than one group because FlexWEB must know which group takes precedence. This is important for applications such as group-based forwarding after a member signs on.

### Example:

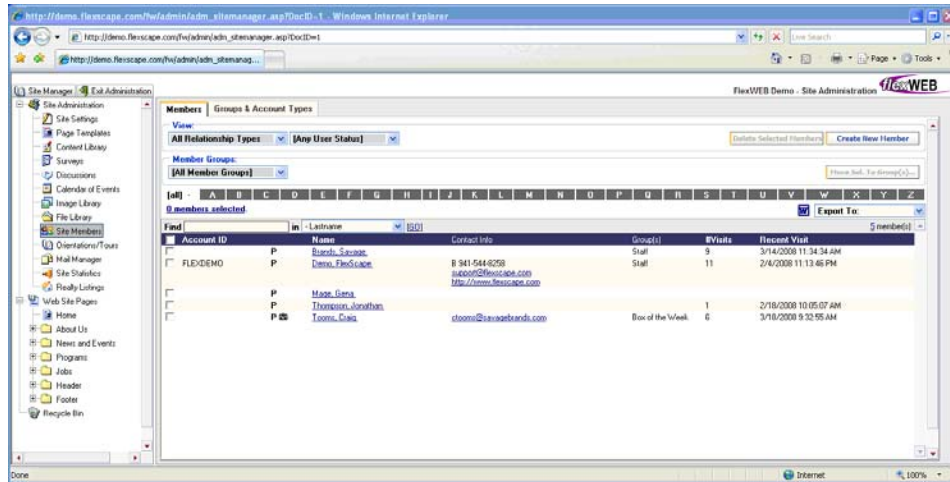
Organization X has defined a group called "Staff," which has a home page called "Staff Info." There is also a group called "Board Members," which has a home page called "Board." If a member belongs to both groups, then the application must know to which home page to display after the member logs on (either the Staff Member or Board Member page). If the group called "Board Members" is higher in the group hierarchy than the group called "Staff," then a member who belongs to both groups would be directed to the page "Board" (and not to the page "Staff Info"), since it is higher in the hierarchy.

## Managing Current Members

The Site Members area within FlexWEB site administration allows you to view and manage all the site member accounts registered for your web site.

To manage the current members:

1. Click the **Site Members** icon in the Site Administration area. This opens the Members page.



2. Use one of the following options to view or manage the registered members on your site:

Option	Use
View (Types, Status)	Select the <b>Relationship Types</b> (Primary Users, Family Account Users), and <b>User Status</b> (User, Author, Administrator, or Any) using the dropdown box. The displayed list will change accordingly.
Member Groups	Select the specific member group that you want to see, if you want to see a specific group. Otherwise, the list shows <b>All Member Groups</b> .
[all] A ... Z	Click a letter such as "R" to see just the members whose last names begin with that letter. By default, the list shows all members matching the group, type, and status selections above.
Find	Search the list by name, ID, e-mail address or other criteria – to quickly locate a specific member record.
Create New Member	Create new members for the site. See <a href="#">Adding a New Member</a> for more details.
Member Groups	Choose a Member Groups to view, then add and remove members to and from the group.

Option	Use
Remove Sel. From Group	Click to remove a member from a group. Select a group member by clicking the checkbox next to their name while viewing the member list of a Member Groups, and then click this button to remove the selected member from the group.
Add to this Group	Click this button while viewing a specific Member Groups to add a member to the group. A dialog will appear with all of the site members not already members of the group. Select one or more site members by clicking the checkbox next to their name, and then click <b>Add Selected</b> . The selected site members will be added to the group.
Move Sel. To Group(s)	Click to move selected members to other groups. In the All Member Groups list, select the checkbox next to the members' names you want to move, and then click the <b>Move Sel. To Group</b> button. A window will open with the list of all available groups. Select the group to move members to, and then click the <b>Apply</b> button. The selected members will be moved to the chosen group.
Export To	Click to export the member list to Microsoft Word format for printing, or to Excel for analysis.

- Click a member Name to see details for the member. If you see a camera icon next to the name, you can click it to see a picture of the member.

## Adding a New Member

Normally, new members sign up using a registration form published on your website. However, authorized site administrators can also add new members to the site manually. The Members Tab is where the site administrator can create a new member. Although all fields do not have to be filled in to create a new member, there are some required fields shown with a red asterisk next to field.

### To add a new member:

- Click the **Site Members** icon in the Site Administration area. This opens the Members page.

- Click the Create New Member button at the upper right. This opens the Member Profile window.

- Make the following entries or selections:

Field or Selection	Purpose
Account Information	Enter the member's personal information. Fields marked with a red asterisk are required. The user must have a <b>Username</b> and <b>Password</b> for login purposes. The password must be entered twice for verification purposes. The <b>User Home Page</b> is the page that the member will see immediately after signing in, if different from the main site home page. Notice that the <b>User Status</b> is "Site User" by default. Change this selection only if you want the user to be able to create web pages on the site (set it to <b>Author</b> and <b>Publisher</b> ) or if you want the user to have full administrative rights (set it to <b>Site Administrator</b> ).

Field or Selection	Purpose
Upload New Image	Click this button to upload a photo of the member, if available. When the File Upload dialog box appears, click the <b>Browse</b> button to locate the photo on a local or network drive. Turn on the <b>Automatically downsize</b> checkbox if you want the photo to be resized automatically to an appropriate size. Click the <b>Start Upload</b> button to load the file into the member record.
Group Membership	Check the appropriate Group or Groups the new site member will be a member of. If a member is not checked off as part of a group, and they are a Site User, they will not be able to login to the site.  The list of Groups contains Site Member Groups and E-mail Groups, so you can add this new member to the appropriate login and e-mail group(s).
Contact Information	Enter any contact information for the member.
Address	Enter any addresses for the member, including the member's primary and secondary address.
Profile	Enter a short profile or biographical information for the member, if available.
Survey Responses	This portion of the member record is not editable. Any survey responses that the member submits will be summarized here.
Record Information	This portion of the member record is not editable. This area will display information about when the record was created and updated, how many visits the member has made to the site, and dates of the most recent visits.

4. When you are finished filling out the new member record, scroll back to the top and click the **Save Member Record** button to save this record. You should see the message **Account Successfully Added** on the top line of the screen.
5. Click the **Back to List** button when you are ready to return to the member list.
6. Contact any new members that you have entered, to notify them of their new member status, as well as the username and password for secure login.

## Adding a Secondary Member

This feature allows you to add a spouse, child, or another relation to a Primary Member. You can filter out secondary member information when viewing member lists and reports to limit the number of members on a given list or view what member is a secondary member to another.

To add a secondary member:

1. Click the member's name who will be the Primary Member in Site Members. This will open all the information about that member.
2. Just above the Contact Information, click the **Add a Secondary Record** button. This will open a new window.
3. Select a relationship with the **Choose the Relationship Type** dropdown box. The choices are: Child, Spouse or Other.
4. Fill in the secondary member's information.
5. If the Secondary Member is not already in the database, click **Create a New Secondary Record**. A new record for information will open to fill in. Information, like addresses, will automatically be populated with the information from the Primary Member. Fill in the rest of the member's information and click **Save Member Record** to save the record.
6. If the Secondary Member record already exists in the database, click **Assign from Already Existing Record**. A database of All Members will open. Use the Find feature to find the member if the list is long. Click the member's name to select them, and click OK.

## Viewing and Editing an Existing Member Record

The Members tab is where the site administrator can view and change an existing member's information. Typically, this feature is used when you need to:

- Lookup or reset the user password
- Update the member's address or contact information
- View or print the member's survey responses
- Lookup member activity, including number of visits and date of last visit

When the member's profile is opened, it displays all data that was entered to create a new member.

### To edit an existing member record:

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click a member name to go to the member's profile.
3. Make any changes as desired.
4. To lookup the member's password (e.g., at member request), click the **Show Password** button. This feature is available only if the User Status is **Site User** or **Author and Publisher**. You will not be able to lookup a password for **Site Administrator**.
5. To view and print the user's survey responses, use the button labeled **Click Here to Show User's Survey Data**. This opens up a separate window with the survey response summary displayed, and a **Print** button for printing the information.
6. To view the number and date of this member's site visits, scroll to the bottom of the screen and examine the **Record Information**.
7. When finished, scroll back to the top of the record and click the **Save Changes** button to save your changes, then click the **Back to List** button to return to the main member directory.

## Deleting a Member

The site administrator has the ability to delete any member.

### To delete a member:

1. Click the **Site Members** icon in the Site Administration area. This will open the main member directory.
2. Scroll down or use the controls at the top of this directory to locate the name of the member to be deleted.
3. Use one of the following options to delete the member.
  - To delete one or more members directly from the list, click the checkbox(es) next to the member name(s) and then click the **Delete Selected Members** button.
  - To verify a member record before deletion, click the member name to open the profile window, then click the **Delete Record** button inside the profile window. You will be asked to confirm the deletion. Click **Yes** to complete the deletion.

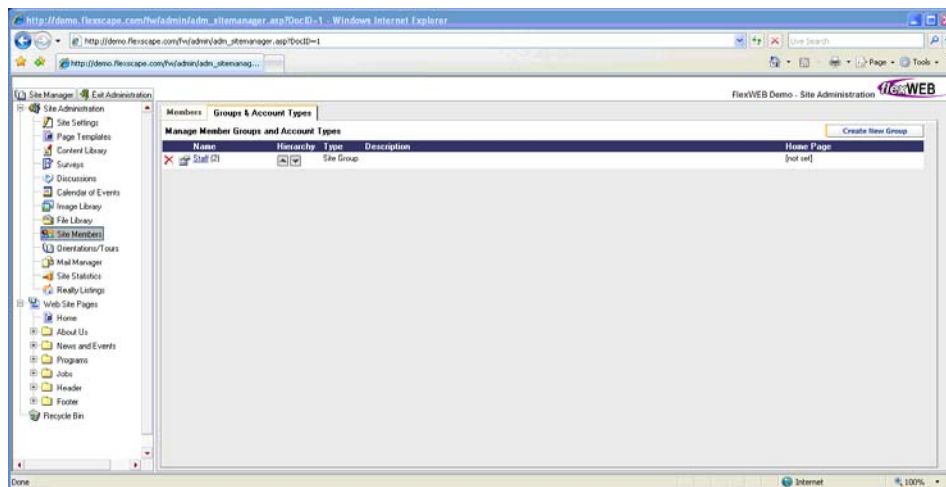


## Managing Member Groups and Account Types

One of the most powerful features of FlexWEB is its ability to define groups of users (members), and then create different portals and define private sections of the site for each of the defined groups. The site administrator can manage group lists, create new groups, edit existing groups, delete groups, change a group hierarchy, and export the group membership directory to Word or Excel. Once a group is defined, you can limit access to specific web pages, web site areas, Image Library folders, and File Library folders so that they can only be seen and accessed by members of that group. Access rights for a group are set at the time that the web page, section, or folders are created, but can also be reset at any time by the site administrator. For more details on this concept, see [Understanding Groups, Account Types, and Hierarchy](#).

To manage the current groups and account types:

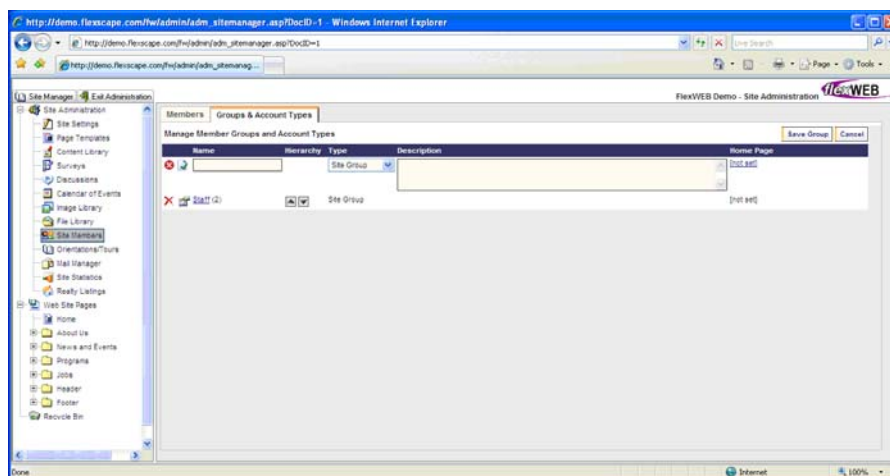
1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **Groups & Account Types** tab to view the list of defined groups.



3. Use the **Delete** icon to delete a group.
4. Use the **Edit Group Properties** icon to change any of the displayed information for the group, such as the group name, type, description, or home page.
5. Use the **up/down arrows** next to each group name to change the group's position in the hierarchy.
6. Click a group name to see a list of all the members in the group. A separate window opens with its own search field for searching through long lists. Use the **Close** button to close this window when finished.

To add a new group:

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **Groups & Account Types** tab to view the Group Types.



3. Click the **Create New Group** button to open a new line in the directory, and then complete the following fields:

Entry	Purpose
Name	Enter a name for the group.
Type	Select whether this entity will be a <b>Site Group</b> or an <b>Account Type</b> from the dropdown box.
Description	Enter a brief description of this group or account type.
Home Page	Click the <b>[not set]</b> link and use the pop-up window to select the appropriate home page for the group if this group or account type will have its own home page. This assumes that the home page has already been created. If not, you can still create the group and then return later and edit the group record to identify the home page.

4. When finished click the **Save Group** button or the **Save Changes** icon.

To change a group or account type definition:

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **Groups & Account Types** tab to view the Group Types.
3. Click the **Edit Group Properties** icon next to the Group Name.

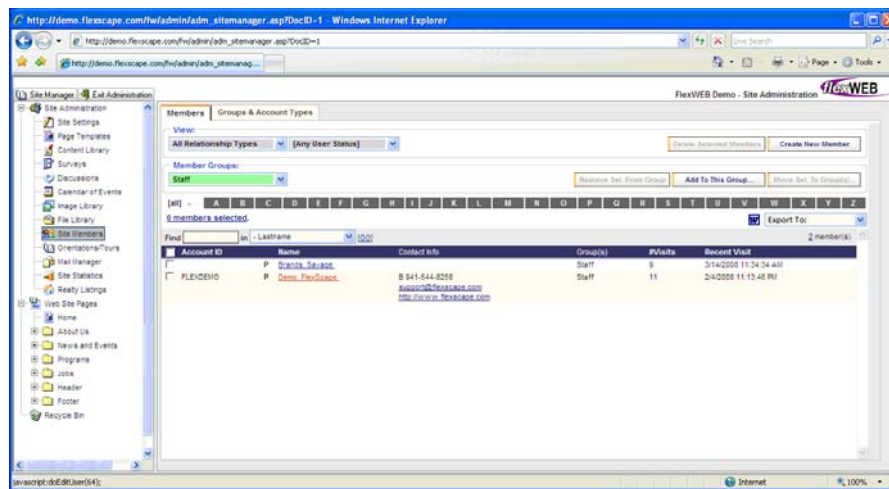
4. Change the name, description, type, or home page, as desired.
5. When finished, click the **Save Group** button.

## View Group Members

The site administrator has the ability to view members of specific groups. While viewing selected groups the administrator can search for members.

To view group members:

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **Groups & Account Types** tab to view the Group Types.
3. Click a Group Name to open the Group Members window.



4. Make any entries and selections from the table below.

Entry	Purpose
Members belonging to	View the members in the assigned groups from this window.
Show	Choose a group list from the dropdown menu.
Search	Search the list by Lastname, Firstname, E-mail address, and Group(s).

5. Click the **Close** button when finished.

## Deleting a Group

The site administrator can delete a group from the site without having to reassign its members. When a group is deleted its current members will not be deleted, but they will exist in the system without group affiliation.

**To delete a group:**

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **Groups & Account Types** tab to view the Group Types.
3. Click the **Delete** icon next to the Group Name to be deleted.
4. Confirm the deletion by clicking **Yes**.

## Exporting Membership Lists

FlexWEB allows member lists to be exported to a Microsoft Word file for printing purposes, or to an Excel file for analysis. This feature allows the site administrator to work on the member lists offline or to print them.

**To export the membership list:**

1. Click the **Site Members** icon in the Site Administration area. This will open the Site Members page.
2. Click the **All Member Groups** dropdown arrow and select the group you want to export.
3. You can narrow the member sorting to be **Primary Account Holders** only or to include all **Secondary Account Holders** like **Spouse** and **Child**.
4. To change the listed members, you need to change **View** from the default setting **All Relationship Types**. Click the **All Relationship Types** dropdown arrow and select **Primary Account Holders** to list only the Primary Account Holders in the selected group, or select **Family Account Listing** to list all Primary and Secondary account members in the selected group.
5. Select the member information you want to export by clicking the checkbox next to a member **Account ID**. Multiple selections can be made.
6. From the **Export To** dropdown menu, choose either the **Word** or **Excel** format.
7. Follow your computer's instructions to **Download** or **Save**.

## Publishing Member Directories and Group Lists

Once members are registered on your site, the web site authors can easily create membership directories, logon pages, and registration pages, as well as publish member profiles and lists of members currently online. These features are all controlled using the following FlexWEB modules.

Module Type	Purpose
Members Directory	Displays a membership directory with index and search fields.
Members Logon	Inserts a set of login fields to be used for login by registered site members.
Members Registration	Inserts a complete registration form for New Member Registration.
Members Profile	Displays the site members' current registration profile, along with an Edit link for updating it.
Who Is Online	Provides a list of all site members currently logged in to the site, and the pages they are viewing.

These modules can be inserted onto web pages using the editing controls within the web page authoring environment. For more details, see the FlexWEB Author's Guide.



## Chapter 11

# Orientations/Tours

## Understanding Orientations and Tours

The Orientation/Tours feature in FlexWEB allows you to publish online orientation sessions or tours for your organization's employees or customers. It also allows you to manage the list of respondents. For example, you might use this feature for New Member Orientations at a private club or New Employee Orientations at commercial or non-profit organizations.

This is how the feature works:

- The user signs up for the orientation and is guided to read through all related pages or sections of the orientation (which can contain multimedia).
- Once all pages have been visited by the user, an e-mail notification is triggered (to designated addresses), informing them that this user has completed the orientation.
- A database record is kept of user completions (with completion date/time).

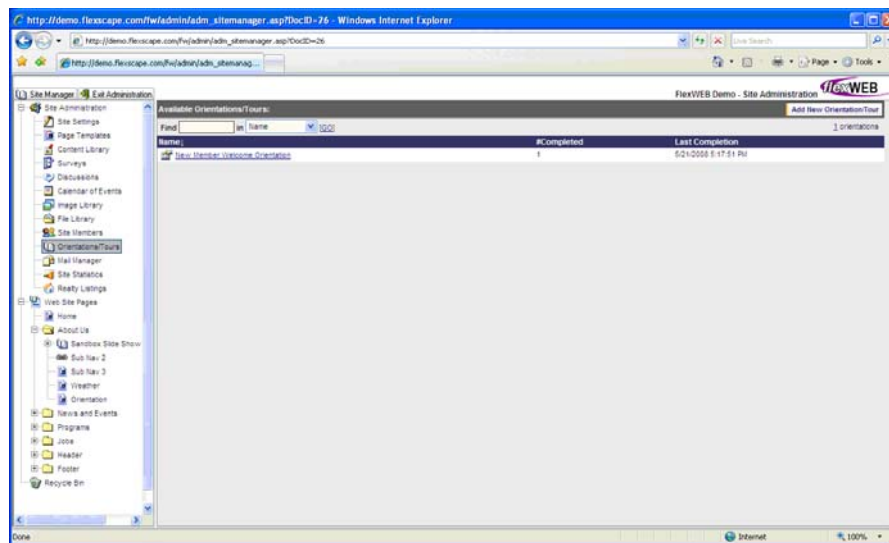
This feature is most valuable for organizations where there are certain rules and regulations requiring members to complete orientations, either on paper or online.

## Viewing and Managing the Orientation/Tours List

The Site Members area within FlexWEB site administration allows you to view and manage all the individual orientations/tour sessions defined for your web site.

To view and manage the current orientations and tours:

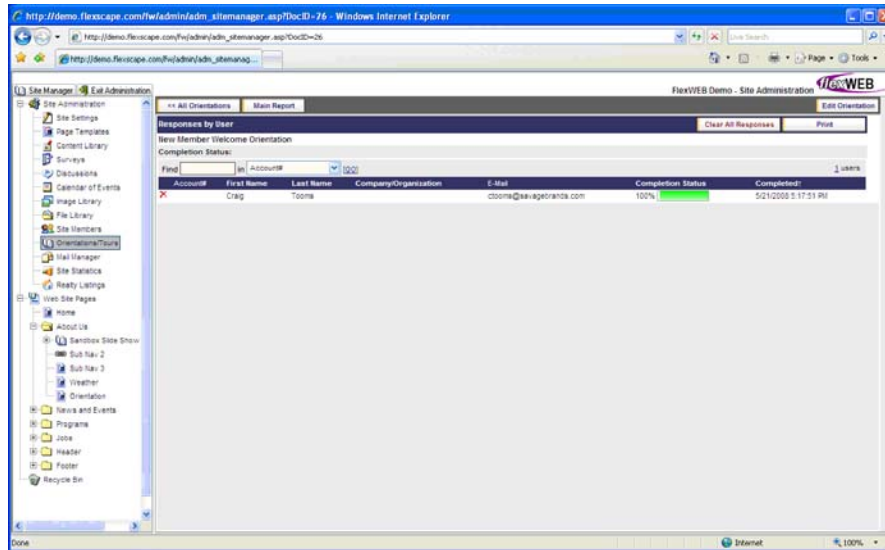
1. Click the **Orientations/Tours** icon in the Site Administration area. This opens the Available Orientations/Tours page, showing the name of each orientation/tour, the number of respondents that have completed each orientation/tour, and the date that the last one was completed.



- If the list is particularly long, you can use the **Find** field to locate a particular record by name, number completed, or last completion date.



2. To view a list of the members who completed a particular orientation/tour, click the orientation/tour name. This displays the Responses by User report.



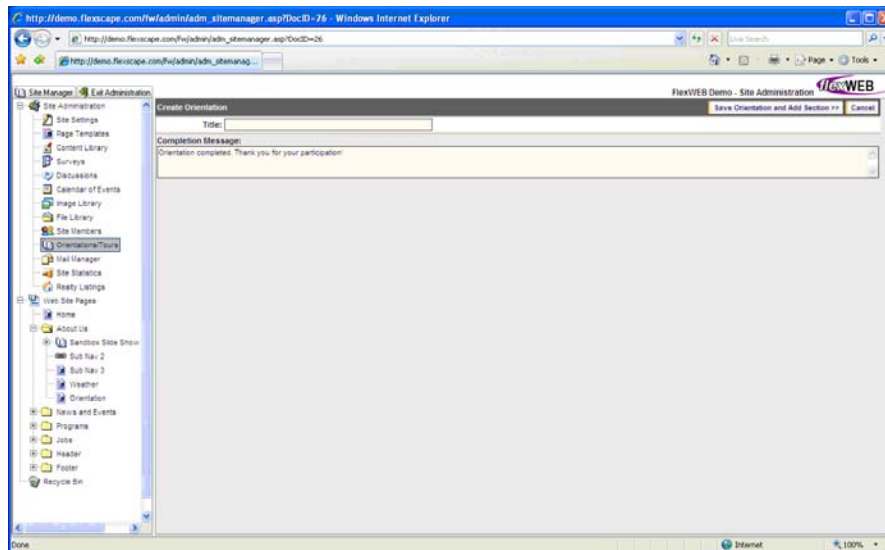
- To print this report, click the **Print** button.
  - If the report is long, you can use the **Find** field to filter it by any of the field types listed on the report. For example, if you want to see only participants from a certain organization, enter the organization name in the Find field and select **Company/Organization** from the dropdown list.
  - To go back to the detailed report, click the **Main Report** button. This button will show the original list shown when you initially clicked on an orientation name.
  - Once you have viewed the responses, you can clear this report by clicking the **Clear All Responses** button.
3. When you are finished viewing the report, click the **All Orientations** button to return to the main list.

## Adding a New Orientation/Tour

You can add more sessions to the current list of available orientations and tours. This feature allows you to create each of the web pages in your orientation/tour and organize them into sections. You can also define a completion message that will be shown to the user upon completing the orientation/tour. Orientations and tours will be applied to your web site by placing an Orientations/Tours module on a page. See the Author's Guide for more on the Orientations/Tours module.

To add a new orientation or tour:

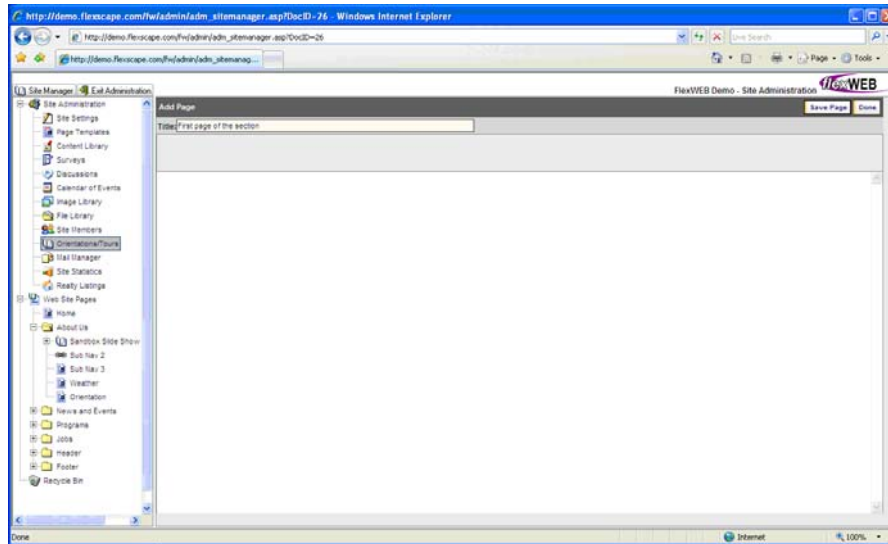
1. Click the **Orientations/Tours** icon in the Site Administration area. This opens the Available Orientations/Tours page.
2. Click the **Add New Orientation/Tour** button at the upper right. This opens the Create Orientation window.



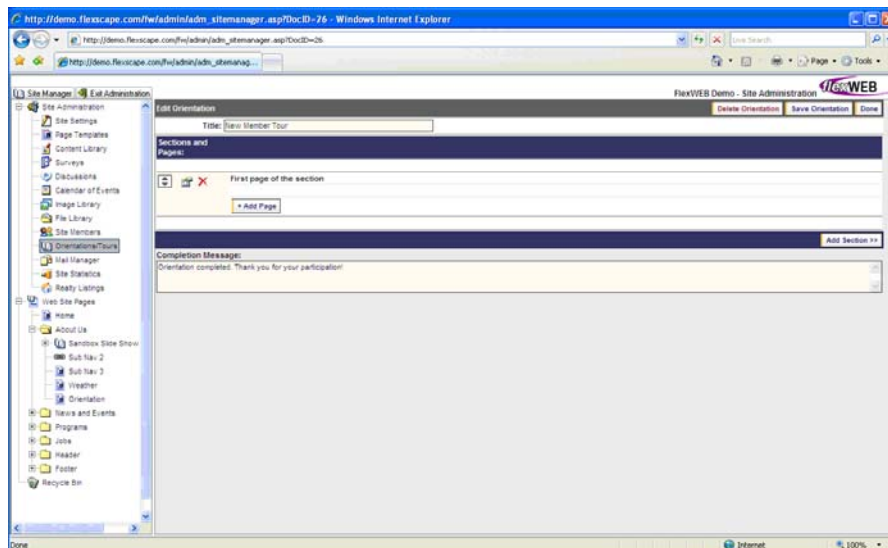
3. Make the following entries:

Field or Selection	Purpose
Title	Enter a descriptive name for this orientation or tour. This name will appear on the main list.
Completion Message	This is the message that the user will see upon completing the orientation/tour. Change it if you prefer a different phrasing.

- Click the **Save Orientation and Add Section** button to move to the next screen. This opens the Add Page screen, which allows you to add the first page of your tour. If you want to create multiple sections in your tour, this will be the first page of the first section.



- Type in the information needed on this page. Use the editing controls to format the information and the other controls to insert images, tables, hyperlinks, and modules, as necessary. For details on page creation and editing, see the FlexWEB Author's Guide.
- When you are finished setting up the page contents, click the **Save Page** button, and then click the **Done** button. This opens the Edit Orientation screen.



Within this screen, you will see the **Title** and **Completion Message** that you entered previously, plus a new area called **Sections & Pages**, which lists the title of the first page that you created.

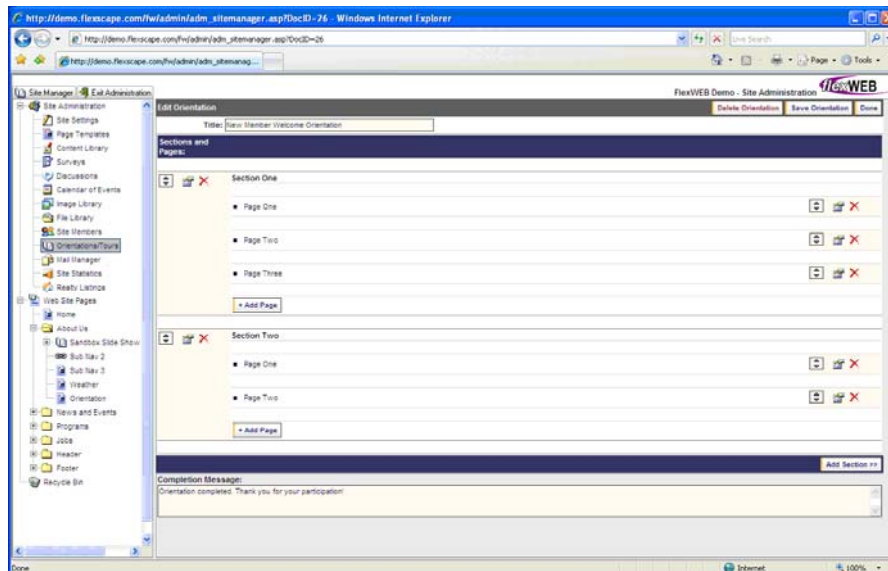
7. At this point, you have a number of options:
  - To add another page to the same section, click the **Add Page** button, and repeat the last two steps.
  - To start a new section, click the **Add Section** button, and repeat the last two steps.
  - To re-arrange the sections, use the arrow box on the left to move a section up or down.
  - To re-arrange pages within a section, use the arrow box on the right to move a page up or down.
  - To change a section opening page, use the **Edit** icon to the left of the section name. This displays the Edit Page screen, which allows you to change the title or content of the section opening page. Click **Save Page** and **Done** when finished.
  - To change any other page within a section, use the **Edit** icon to the right of the page name. This displays the Edit Page screen, which allows you to change the title or content of the page. Click **Save Page** and **Done** when finished.
  - To delete an entire section, use the **Delete** icon to the left of the section name, then click **Yes** to confirm the deletion.
  - To delete a page within a section, use the **Delete** icon to the right of the page name, then click **Yes** to confirm the deletion.
8. When you are finished creating the orientation/tour, click the **Save Orientation** button and then click the **Done** button. This opens the Responses by User report. Since this is a new orientation/tour, the report will be empty.
9. Click the **All Orientations** button to return to the main list of orientations/tours.

## Changing an Orientation/Tour

You can change an existing orientation/tour at any time. You can add more pages or sections, change the content of the pages, change the relative sequence of pages or sections, or delete pages and sections.

To change an existing orientation or tour:

1. Click the **Orientations/Tours** icon in the Site Administration area. This opens the Available Orientations/Tours page.
2. Click the **Edit** icon to the left of the item that you want to change. This opens the Edit Orientation window.



3. Change the Title or Completion Message, as desired. You also have the following options:
  - To add another page to a section, click the **Add Page** button within that section. This displays the Add Page screen. Type in the information needed on this page and use the editing controls to format it (for details on page creation and editing, see the FlexWEB Author's Guide). Click **Save Page** and **Done** when finished.
  - To add a new section to the tour, with its own set of pages, click the **Add Section** button. This displays the Add Page screen, which you can use to set up the first page of the section. Type in the information needed on this page and use the editing controls to format it. Click **Save Page** and **Done** when finished.
  - To re-arrange sections, use the arrow box on the left side to move a section up or down.

- To re-arrange multiple pages within a section, use the arrow box on the right side to move a page up or down.
  - To change a section opening page, use the **Edit** icon to the left of the section name. This displays the Edit Page screen, which allows you to change the title or content of the section opening page. Click **Save Page** and **Done** when finished.
  - To change any other page within a section, use the **Edit** icon to the right of the page name. This displays the Edit Page screen, which allows you to change the title or content of the page. Click **Save Page** and **Done** when finished.
  - To delete an entire section, use the **Delete** icon to the left of the section name, then click **Yes** to confirm the deletion.
  - To delete a page within a section, use the **Delete** icon to the right of the page name, then click **Yes** to confirm the deletion.
4. When you are finished changing the orientation/tour, click the **Save Orientation** button and then click the **Done** button. This opens the Responses by User report, which you can use to review any user responses to-date.
  5. Click the **All Orientations** button to return to the main list of orientations/tours.

## Deleting an Orientation/Tour

You can delete an existing orientation or tour at any time. Deleting an orientation/tour removes it from the site and discards all user responses.

### To delete an orientation or tour:

1. Click the **Orientations/Tours** icon in the Site Administration area. This opens the Available Orientations/Tours page.
2. Click the **Edit** icon to the left of the item that you want to delete. This opens the Edit Orientation window.
3. Click the **Delete Orientation** button at the top of the screen.
4. Click **Yes** when asked to confirm the deletion.

## Chapter 12

# Mail Manager

## Understanding E-Mail Management Features

The FlexWEB Mail Manager Module allows the site administrator to manage e-mail lists and generate mass e-mailings to any group of members or site users who subscribe or “opt-in” to site newsletters or notification categories.

The Mail Manager is a top-level selection in the Site Administration area of the FlexWEB Site Manager panel. When you click this icon, you will see four major e-mail management areas, represented by tabs along the top of the window:

### Sent E-mails

This shows all of the e-mails that have already been sent. You can review and edit the contents of an e-mail, review and change the list of recipients for the e-mail, and re-send the e-mail, as needed. You can also create new e-mails for mass distribution. For more details, see [Creating a New E-Mail](#).

### Unsent E-mails

This shows all of the e-mails that have been created, but have not been sent yet. You can review and edit the contents of each unsent e-mail, review and change the list of recipients for the e-mail, and re-send the e-mail, as needed. You can also create new e-mails, which can be sent immediately or stored in this area for future use. For more details, see [Creating a New E-Mail](#).

### Opt-In E-mail Groups

This is a list of the e-mail subscriber groups that you have created for user subscription purposes. You can view the list of users who have already subscribed to each group (via user sign-up forms). You can also create new subscription groups or delete existing groups. For more details, see [Managing Subscriber Groups](#).

## Subscribers

This is a list of all subscribers to all groups. You can sort and filter the list for easier review, and you can also create new member/subscriber accounts or sign up existing members to e-mail groups. For more details, see [Managing the Subscriber List](#).

## Reviewing Current E-mails

The Mail Manager is a top-level selection in the Site Administration area of the FlexWEB Site Manager panel. When the Mail Manager is opened, it defaults to the Sent E-mails tab. The site administrator can then review both sent and unsent e-mails.

### To view all current e-mails:

1. Click the Mail Manager icon in the Site Administration area. This will open the Mail Manager page and display the list of sent e-mails. To view unsent e-mails click the Unsent E-mails tab.
2. You can view the following details for each e-mail in either list:

Entry	Purpose
Subject	Shows the subject of the e-mail. Click to edit the e-mail, change the recipients, and send or resend the e-mail.
Release Date	Shows the creation date for the e-mail. This is important for e-mail subscribers that sign up to receive an e-mail newsletter. This ensures new subscribers will automatically receive the most recent newsletter.
Date Last Sent	Shows the date the e-mail was last sent. The same e-mail can be sent repeatedly, with edits.
#Sent	Shows the number of times this e-mail was sent.
#Recipients	Shows the number of e-mail addresses to which the e-mail was sent.
Date Created	Shows the date and time that the e-mail was first created.

3. If the list is very long, you can use the **Find** feature to search by any of the fields in the list.

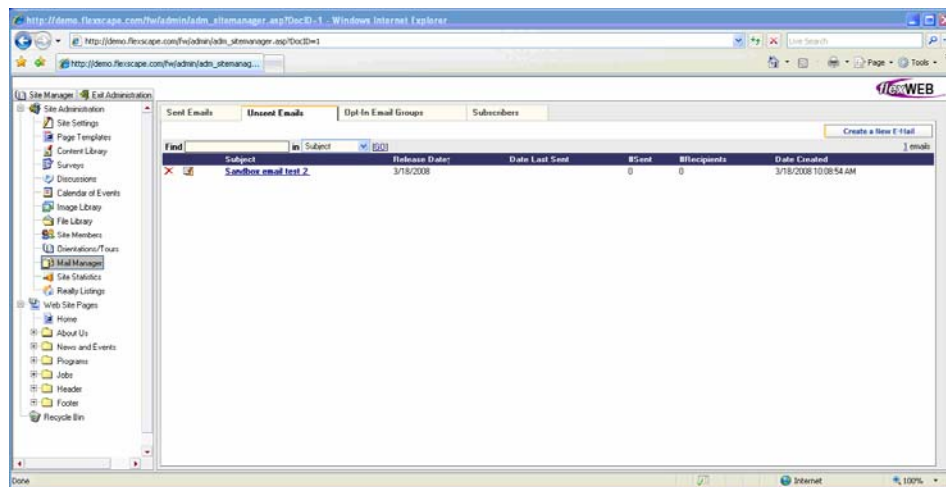


## Editing an Existing E-Mail

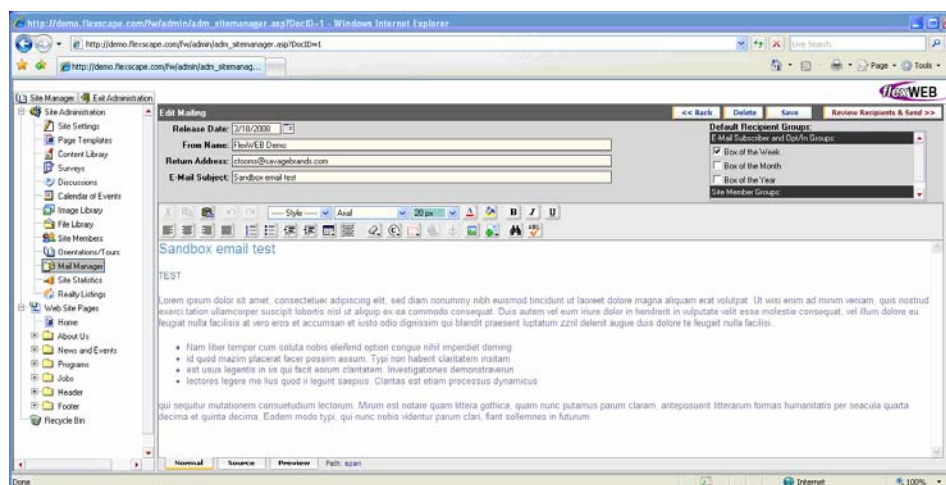
The site administrator can edit existing e-mails, whether they have been sent or remain unsent. This gives you the opportunity to add or change an e-mail without having to create it from scratch. You can also use previous e-mails as a template for future e-mails by simply changing or updating them, such as an invitation to a monthly meeting that remains basically the same each month, except for changes to the date and the meeting agenda.

To edit an existing e-mail:

1. Click the **Mail Manager** icon in the Site Administration area. This will open the Mail Manager page and display the Sent E-mails tab. To edit unsent e-mails, click the **Unsent E-mails** tab.



2. Click the Subject of the e-mail, or click the **Edit** icon to the left of the Subject. This opens the header and body of the e-mail in the Edit Mailing window.

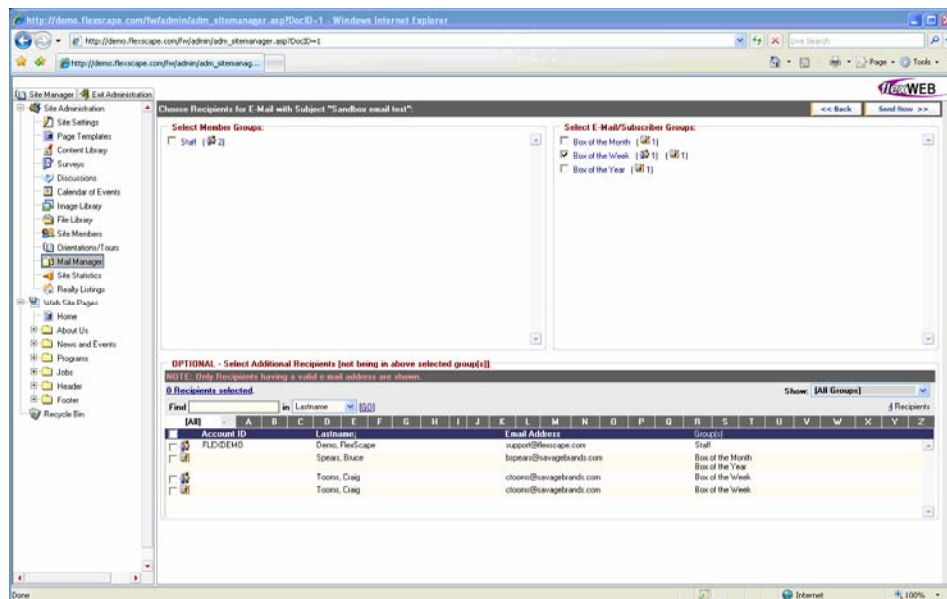


## 3. Change any of the fields listed in this table:

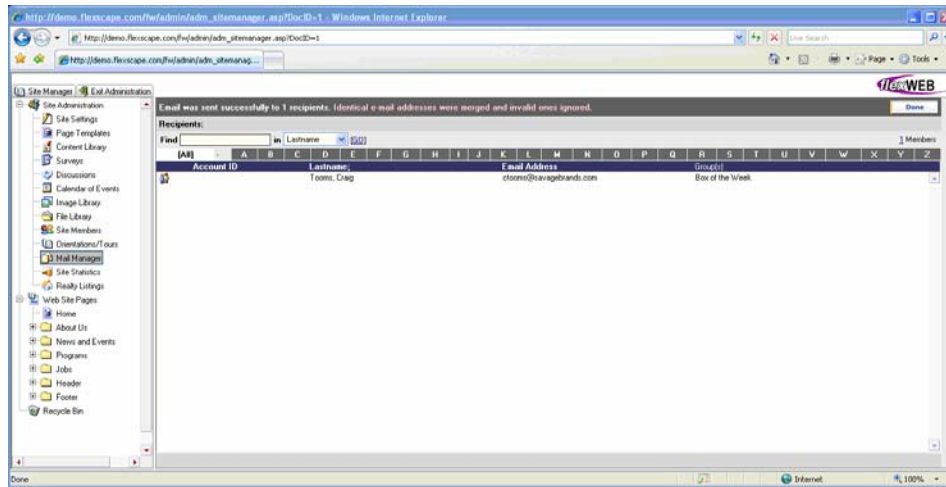
Entry	Purpose
Release Date	Shows the creation date for the e-mail. This is important for e-mail subscribers that sign up to receive an e-mail newsletter. This ensures new subscribers will automatically receive the most recent newsletter.
From Name	Shows the name that will appear in the "From" field when the e-mail is sent.
Return address	Shows the address that will be inserted automatically in the "To" field of any return e-mail, if the e-mail recipient uses their "Reply" button to respond to this e-mail.
E-Mail Subject	Shows the description, as it will appear in the "Subject" field when the e-mail is sent.
Default Recipient Groups	Shows the FlexWEB member groups or e-mail subscriber groups selected to receive this e-mail when it is sent.
Text Body	Shows the body of the e-mail, which can include text, images, hyperlinks or forms.

4. Click the **Save** button to save any edits you have made.
5. If you want to send the revised e-mail now, click **Review Recipients & Send** and continue with the remaining steps below. If not, click the **Back** button and skip the following steps.

If you clicked **Back**, the e-mail will be stored in the Unsent E-mails list. If you clicked **Review Recipients & Send**, this opens the Choose Recipients screen.



6. Select the desired recipients for this e-mail. You can select from among e-mail subscriber groups, member groups, or individual subscribers who are not associated with groups.
7. Click the **Send Now** button. This sends the e-mail to the selected groups and/or subscribers, and displays a list of the recipients.



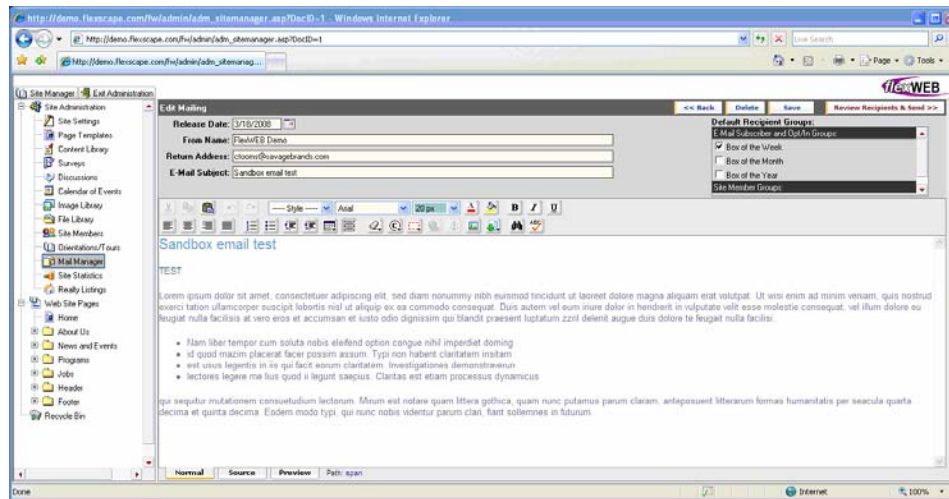
8. Click the **Done** button when finished reviewing this screen.

## Creating a New E-Mail

You can create new e-mails at any time, for distribution to e-mail subscriber groups, member groups, or individual subscribers. You can store the new e-mail for sending later, or send it immediately.

To create a new e-mail:

1. Click the **Mail Manager** icon in the Site Administration area. This will open the Mail Manager page and display the list of sent e-mails. To view unsent e-mails click the **Unsent E-mails** tab.
2. Click the **Create a New E-Mail** button. This opens the header and body of the new e-mail in the Edit Mailing window.



3. Make the following entries to create the e-mail:

Entry	Purpose
Release Date	Enter a creation date for the e-mail. This is important for e-mail subscribers that sign up to receive an e-mail newsletter. This ensures new subscribers will automatically receive the most recent newsletter.
From Name	Enter the name that you want to appear in the e-mail "From" field, when the e-mail is sent.
Return address	Enter a return e-mail address here. This address will be inserted automatically in the "To" field of any return e-mail, if the e-mail recipient uses their "Reply" button to respond to this e-mail.

Entry	Purpose
E-Mail Subject	Enter the subject of the e-mail, as you want it to appear in the "Subject" field when the e-mail is sent. This description will also appear as the main identifier when this e-mail is listed in the FlexWEB mail management screens.
Default Recipient Groups	Turn on the checkbox for any FlexWEB member group or e-mail subscriber group that you want this e-mail to be sent to by default.
Text Body	Enter the information that you want included in the body of the e-mail, which can include text, images, hyperlinks, forms, or FlexWEB modules. For details on editing controls, see the FlexWEB Author's Guide.

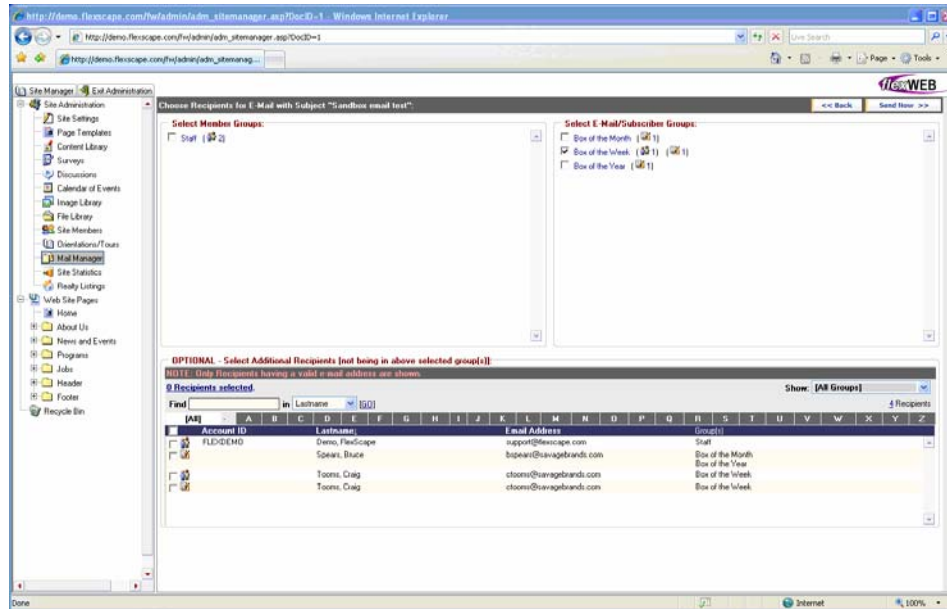
You can also insert an e-mail template from the template manager to maintain a consistent look and feel for e-mails.

- Click the **Modules** icon with the green plus sign in the tool bar to insert an e-mail template (This assumes that an e-mail template has been created. See the FlexWEB Author's Guide for more information).
- Select **Insert Content from Template**. This will open a new window with all the available templates.

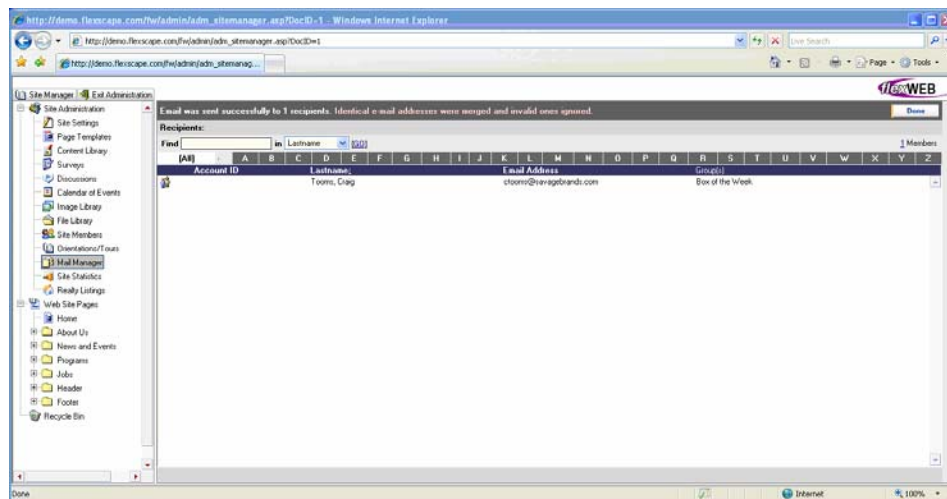
New Blank	Allows you to create a new template. This is just like creating a web page, see FlexWEB Authors Guide.
New (From Page in Editor)	Create a template from the current web page that you are viewing. In this case it is an e-mail. For example, if you have an e-mail that you want to make into a template, open that e-mail and then the template manager. Click <b>New (From Page in Editor)</b> and it will insert the page into the template manager. You can then name the template accordingly.
Edit	Click to edit the selected template.
Use This Template Now	Click to insert the selected template into the body of your e-mail.

- In the upper right corner of the window, click the **Template** dropdown arrow to see the list of templates.
- Select the desired template, in this case the E-mail Template, then click **Use This Template Now** and it will insert the selected template into the body of your e-mail.
- Click the **Save** button to save your entries.
- If you want to send the new e-mail now, click **Review Recipients & Send** and continue with the remaining steps below. If not, click the **Back** button and skip the following steps.

If you click **Back**, the e-mail will be stored in the Unsent E-mails list. If you clicked **Review Recipients & Send**, this opens the Choose Recipients screen.



10. Select the desired recipients for this e-mail. You can select from among e-mail subscriber groups, member groups, or individual subscribers who are not associated with groups.
11. Click the **Send Now** button. This sends the e-mail to the selected groups and/or subscribers, and displays a list of the recipients.




12. Click the **Done** button when finished reviewing this screen.

## Deleting an E-Mail

The site administrator can delete e-mails listed in either the Sent E-mails or Unsent E-mails tabs.

To delete an e-mail:

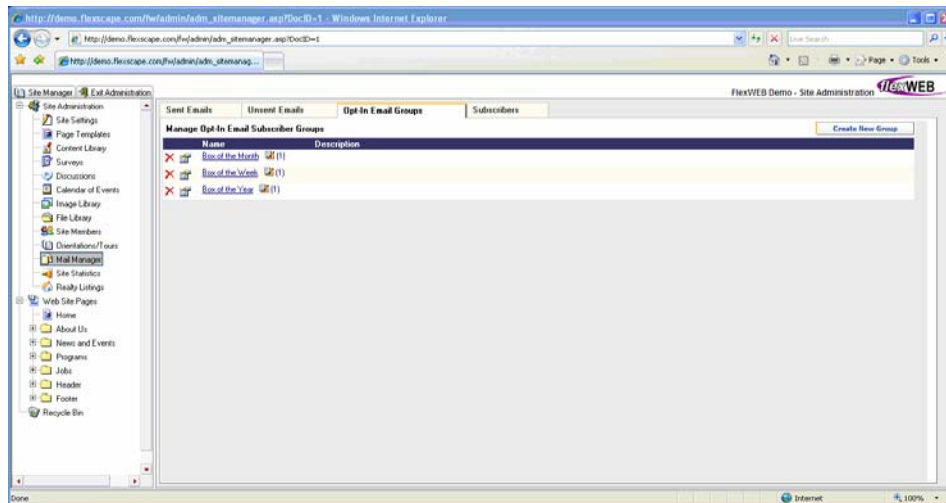
1. Click the **Mail Manager** icon in the Site Administration area. This will open the Mail Manager page.
2. Click either the **Sent E-mails** tab (default) or the **Unsent E-mails** tab.
3. Use one of the following methods to delete the e-mail.
4. From the list, click the  next the Subject.
5. Open the e-mail by clicking on the e-mail's Subject and then click the **Delete** button located at the top of the page.
6. Click **Yes** to confirm deletion.

## Managing Subscriber Groups

The site administrator has the flexibility to view subscriber groups and make changes, as needed. You can change a group name or description, create new groups, view the group subscribers, or delete a group.

To manage subscriber groups:

1. Click the **Mail Manager** icon in the Site Administration area. This will open the Mail Manager page.
2. Click the **Opt-In E-mail Groups** tab to open it. This displays a list of all existing subscriber groups.



- To change the group Name or Description, click the **Edit Group Properties** icon, and then retype the information, as desired. Click the **checkmark** icon or the **Save Group** button when finished, to save your changes.
- To view the subscribers who have registered for membership in a particular group, click the group's Name.
- To create a new group, click the **Create New Group** button, type in the group Name and Description, and then click the **checkmark** icon or the **Save Group** button to add the new group to the list.
- To delete a group, click the **Delete** icon next to the group name, and then click **Yes** to confirm the deletion.



## Managing the Subscriber List

Authorized site administrators can view a complete list of all subscribers to various e-mail opt-in groups. You can view and edit subscriber details, add new subscriber records, assign subscribers to groups, and export the subscriber list to Microsoft Word or Excel.

### To manage the subscribers list:

1. Click the **Mail Manager** icon in the Site Administration area. This will open the Mail Manager page.
2. Click the **Subscribers** tab to open it.
3. If the list is long, you can use the following controls to sort and filter it:

Control	Purpose
Choose View	Choose how the list is to be displayed. You can display a "short list" (without subscriber detail information) or a more detailed list.
Opt-In Groups	Change the list to show just the subscribers for a particular opt-in group. The default shows <b>All Subscribers</b> .
[All]	Change the list to show just the subscriber names starting with a particular letter. The default list shows <b>[All]</b> subscribers that match the categories chosen above.
Find	Search to locate all subscriber records that match a particular name, e-mail address, company, or group.
Export To	Export selections to a Microsoft Word or Excel file.

4. Click a subscriber **Name** to view or change the details for that subscriber.
5. Click a subscriber **E-mail address** to send an e-mail to that person immediately.

6. Use the following controls to add new subscribers or assign them to groups:

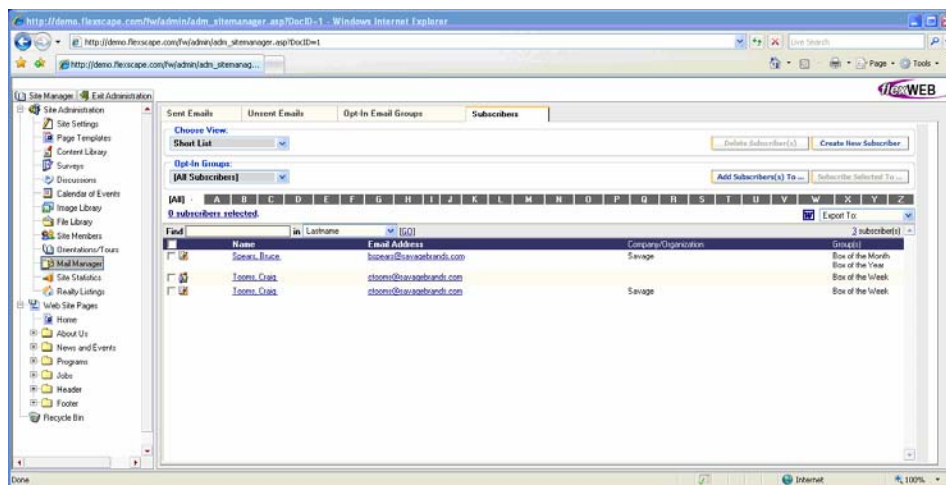
Control	Purpose
Create New Subscriber	Manually register a new subscriber. This opens the Profile form for the subscriber. For more details, see <a href="#">Adding New Subscribers</a> .
Add Subscribers To	Assign existing subscribers to additional groups. This opens a second window, where you can view the subscribers (all, or those for a particular group), select the ones requiring new assignment, and then select the groups to which you want to assign the selected subscribers.
Subscribe Selected To	This button is available only if you have checked off some of the subscribers in the list. Click to open a second window where you can select the groups you want the selected subscribers assigned.
Delete Subscribers	This button is available only if you have selected some of the subscribers in the list for deletion. Click this button to delete subscribers, and click Yes to confirm the deletion.

## Adding New Subscribers

You can easily register new subscribers for membership in existing opt-in e-mail groups.

To add a new subscriber:

1. Click the Mail Manager icon in the Site Administration area. This will open the Mail Manager page.
2. Click the Subscribers tab to open it.



3. Click the **Create New Subscriber** button. This opens the Subscriber Profile screen.

4. Make the desired entries and selections in each section of this screen, as detailed below.

Section	Purpose
Account Information	Enter all information for the account as needed. Fields marked with a red asterisk are required. You can assign an existing web page as the <b>User Home Page</b> by clicking the link provided, and then selecting the page from a site tree diagram. You can also assign the new subscriber to any of the existing groups listed in the <b>Subscribing To</b> list.
Contact Information	Enter the new subscriber's contact information, as available.
Comments/Other	Enter any comments about this subscriber that you wish to store with the record.

5. To save the record, scroll back to the top of the window and click the **Save Member Record** button.

## Setting Up Subscribe/Unsubscribe Forms

FlexWEB authors can easily publish web pages where site visitors can subscribe or unsubscribe to predefined e-mail groups. This is done using the following two FlexWEB modules:

Module Type	Purpose
Mail – Subscription	Inserts a complete registration form for mailing list signup.
Mail - Unsubscription	Inserts a form for unsubscribing from mailing lists.

For more details on the setup and use of these modules, please refer to the FlexWEB Author's Guide.

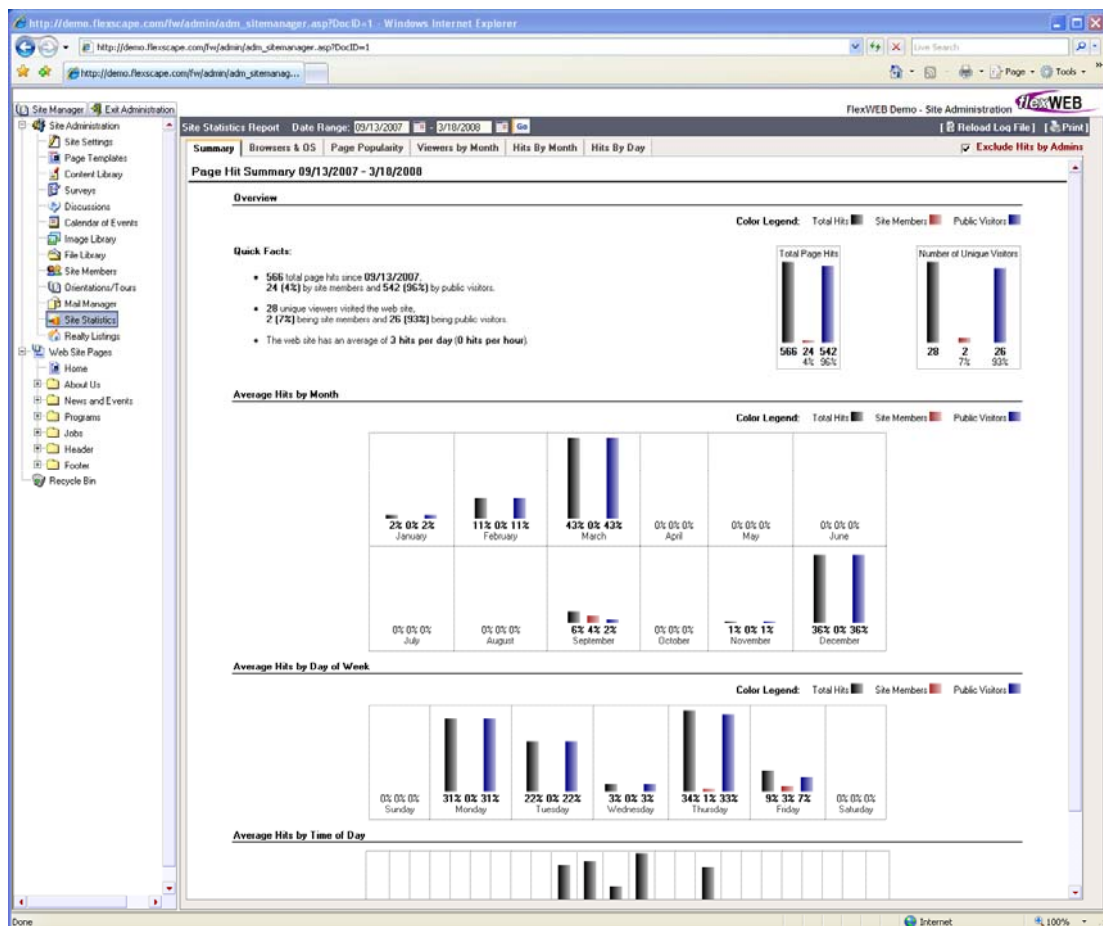
## Chapter 13

# Site Statistics

The Site Statistics Module is a special management area within Site Administration where you can view a broad range of statistical information about the site. The statistics are divided into categories, including general statistics, browser types, page popularity, viewers by month, hits by month, and hits by day. You can view these statistics online or print them out to share with site users or managers.

To view site statistics:

1. Click the **Site Statistics** icon in the Site Administration area. This opens the Site Statistics Report.



2. There are six tabs on this screen, which display the following statistical reports. All of these reports pertain to a specific time period, which you can control using the **Date Range** controls at the top of the window.

Report	Purpose
Summary	An overview of user traffic on your web site, including the average number of page hits per month over the last year, the average hits by day of week, and the average hits by time of day. These statistics are further subdivided into total hits, hits by site members, and hits by the general public – as indicated using the color-coded bar charts.
Browsers & OS	A measure of the types of browsers and operating systems being used to access your website. This includes both the number of hits in each browser/OS category, and a percentage. The bar charts provide a visual gauge of the relative volume.
Page Popularity	A ranking of the most popular pages on the site, showing the hits by site members, hits by the general public, and total page hits. This list includes the home page, unless you turn on the Exclude Home Page checkbox.
Viewers by Month	A listing by month, showing the total site visitors in the following categories: site members, general public, all visitors.
Hits by Month	A listing showing the number of page hits each month during the specified time period, including hits by site members, hits by the general public, and all hits.
Hits by Day	A listing showing the number of pages hit each day during the specified time period, including hits by site members, hits by the general public, and all hits. Because of the large number of days that may be included, this display may take up several pages. The controls at the upper right on this page allow you to specify how many days will be displayed per page in this window. Use the pull-down list to select the page to be displayed, or use the arrows to page back and forth.

3. By default, these reports exclude hits by administrators viewing the site. If you want to include administrator hits, uncheck the **Exclude Hits by Administrators** field.
4. If you want to print a report for general distribution, click the **Print** button. This brings up the standard Print dialog box, which lets you direct the report to any available local or network printer.
5. Under special circumstances you may want to **Reload the Log File** containing the statistics that these reports are based on. Reloading the log file will regenerate all the statistics in all the windows. Since this may take a long time, you will be asked to confirm whether you actually want to do this.

## Chapter 14

# Realty Listings

## Understanding Realty Listings

The Realty Listing module is a special management area within Site Administration where real estate-oriented FlexWEB customers can create and manage real estate listings. This feature supports both residential and commercial properties, and could also be used to summarize facilities or locations available to members of your organization (or your customers) within a large campus or geographically far-flung region. You can organize the listing by category or “community.” A special feature allows you to store a list of “model” floor plans for use with your listings.

## Viewing and Managing Your Listings

The Realty Listings area lets the site administrator view and set up realty listings for property or facilities that your organization needs to publicize on the web site.

To view and define realty listings:

1. Click the **Realty Listings** icon under the Site Administration area. This opens the Realty Management window, which shows the number of properties listed as well as the communities or categories currently defined.
2. Click the link under **All Properties**, if you want to see a list of all the individual properties, add new listings, or export the listings to a Word file. For more details, see [Managing Property Listings](#).
3. Click any link under **Properties by Community/Category** if you want to see a list of the individual properties belonging to that community or category. You can also use the buttons on this page to edit or add new communities. For more details, see [Adding Communities/Categories](#).

4. The first time you use this feature, you may want to spend some time defining the following types of information, which are represented by buttons along the top of the window. This is like a dictionary of standard floor plans, county names, property types, and property features that you can use with all listings. For each of these, you can click an **Add** button to add more definitions to the dictionary, and then click the **Save** button to save it.

Component	Purpose
Models	Shows pictures of individual floor plans, each keyed to a model name. When you click this option, you can see the list of existing models and <b>Add a New Model</b> . You can upload and manage images of floor plans using some of the same controls found in the Image Library. Click the <b>Picture</b> field to open the special Image Library reserved for realty listings. Select the picture of the floor plan that you want to associate with this model name, or use the <b>Upload</b> button to locate a suitable picture on a local or network drive. For details on uploading, see <i>Uploading Images</i> .
MLS Counties	Shows a standard list of counties to use with the listings. When you click this option, you can see the list of existing counties, add more counties to the list, or edit the existing counties in the list.
Unit Type	Shows a standard list of unit types to use with the listings, such as town home, single-family, etc. When you click this option, you can see the list of existing unit types, add more types to the list, or edit the existing types.
Features	Shows a standard list of features to use with the realty listings, such as pool, fireplace, or other common features. When you click this option, you can see the list of existing features, add more features to the list, or edit the existing features in the list.



## Adding Communities/Categories

The Community/Category feature is a convenient way to organize your realty listings by locality or type. The definition of these categories is entirely flexible and can be based on any organizing principle that you may want to use.

To set up a Community/Category:

1. Click the **Realty Listings** icon in the Site Administration area.
2. Click the **Add New Community/Category** button to open the page.
3. Enter a **Name** and a **Description** for the new community or category.
4. If you have a special image that you want to associate with this new community/category, click the **Picture** field to open the special Image Library reserved for realty listings. Select the picture that you want to associate with the community/category, or use the **Upload** button to locate it on a local or network drive. For more details on image uploading, see [Uploading Images](#).
5. When finished entering the information, click the **Save** button. This adds the new community/category to the main list on the Realty Management page.

## Adding Property Listings

You can add new realty listings at any time. The listing parameters can include a broad range of information, including the property status, location, listing dates, feature dates, search keywords, owner details, and more. A detailed and highly formatted description can be entered using FlexWEB's text editor. Before you can define listings, you must define a community/category to store the listing (see [Adding Communities/Categories](#)).

To add a new property listing:

1. Click the **Realty Listings** icon in the Site Administration area.
2. Click the link under **All Properties** to open the Listings page.
3. Select a **community/category** from the dropdown menu at the top of the page. This is the community or category to which the listing will belong.
4. Click the **Add New Listing** button located at the top of the page.

5. Make any desired entries or selections on the two tabs described below.

Entry	Purpose
Listing Parameters	The site administrator can use this screen to enter all the key parameters for the listing, including name/title, dates, status, type, owner information, and more. The Unit Type, Model, and Property Features are taken from your standard list defined under <a href="#">Viewing and Managing Your Listings</a> . All other entries are self-explanatory.
Detailed Description	Use this tab to provide a detailed description of the property listing. FlexWEB provides a standard set of editing controls which you can use to provide a high degree of visual formatting to this information block. For best results, don't get too creative, and make sure the visual style matches other listings on your site for consistency's sake. For more details on the editing controls, see the FlexWEB Author's Guide.

6. To save the information that you have entered, click the **Save** button at the top of the page.
7. Once you save this basic information, you will have access to two more buttons that you can use to add visual information to the listing:

Button	Purpose
Pictures	This opens the special Image Library reserved for realty listings. Select the picture that you want to associate with the listing, or use the <b>Upload</b> button to locate a picture on a local or network drive. For details on uploading, see Uploading Images. If you upload multiple images, the picture with the radio button selected will be the image that appears first with the listing. Also, you can click the <b>Add or Change Image description</b> icon to the left of each image to change the description of each image.
VR Tours	This opens a list of virtual reality tours reserved for realty listings. Select the tour that you want to associate with the listing, or use the <b>Upload</b> button to locate it on a local or network drive. For details on using the uploader, see Uploading Images.

8. At any point, you can click the **Preview** button to see how the listing will look when it is published online. This opens a fully functioning listing window, which includes the ability to print the listing, view the floor plan, or request more information.
9. Once you have the listing set up to your satisfaction, click the **Save** button and click **Done** to add it to the site.

## Changing Property Listings

You can make changes to an existing realty listing at any time, including the listing parameters, detailed description, picture, or VR tour. You can easily preview your changes, and then save the revised listing.

### To change a listing:

1. Click the **Realty Listings** icon in the Site Administration area.
2. Click the link under **All Properties** to open the Listings page.
3. Click the listing to be changed. This opens the Edit Listing screen.
4. Make any changes desired on either of the two tabs: **Listing Parameters** and **Detailed Description**.
5. Use the **Pictures** or **VR Tours** buttons to select a new picture or VR tour for this listing.
6. Click the **Preview** button to see how your changes affect the listing appearance.
7. Click the **Save** button to save your changes.

## Deleting Property Listings

You can delete realty listings at any time. Deleting a listing removes the unique listing information that was entered when you defined the listing, but it does not remove the images or floor plans associated with the listing. These will remain in the Image Library reserved for realty listings, until you delete them separately.

### To delete a listing:

1. Click the **Realty Listings** icon in the Site Administration area.
2. Click the link under **All Properties** to open the Listings page.
3. Click the listing to be deleted. This opens the Edit Listing screen.
4. Click the **Delete** button located at the top of the page.
5. Click **Yes** to confirm the deletion.

## Publishing Listings and Realty Search Pages

All of the information in the Realty Listings site administration area can be published on your site using the following FlexWEB modules:

Module Type	Purpose
Realty Listings – List Properties	Inserts a list of properties from the Realty Listings on a web page.
Realty Listings – List Communities	Inserts a list of communities from the Realty Listings.
Realty Listings – Featured Properties	Inserts a list of currently featured properties from the Realty Listings.
Realty Listings – Show Property	Displays details for a selected property.
Realty Listings – Search	Inserts search fields that can be used to search the Realty Listings.

For more details on the setup and use of the Realty Listings modules, see the FlexWEB Author's Guide.

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