SPIREMEDIA

Documentation for the Spire ESM

Introduction to Announcements

Announcements are a means of communicating to the users of the ESM and are displayed, sorted by date, to everyone who logs into the system.

Use this feature to communicate planned outages or changes to the system or any important information relevant to the ESM users.

Table of Contents

Add an Announcement

To add an Announcement, follow these steps:

1. Either login (which takes you to the Announcements list) or click on the Login tab of the main navigation.
2. Click Add Announcement just below the main navigation.
3. Fill in the fields as described by the fields list section of this document.
4. Click Save.

Edit an Announcement

To edit an Announcement, follow these steps:

1. Either login (which takes you to the Announcements list) or click on the Login tab of the main navigation.
2. Find the announcement that you wish to edit on the Announcements list. Click the edit link below the announcement.
3. Fill in the fields as described by the field list section of this document.
4. Click Save.

Announcements Field List

Title: The title of the announcement. Will appear on the announcements list in bold.

Announcement: The contents of the announcement.

Active: Whether the announcement is active or not. Users who do not have permission to edit announcements will not see ones not set as active.

Display Date: The date that the announcement will start displaying.

Introduction to Users

This section discusses how to manage Users who will have access to the spireESM. Once a user has been created, he/she can be added to various Permission Levels and Content Groups.

This help document will cover adding, modifying and deleting Users from ESM.

Note: In order to act in the Users area, you must have permissions assigned in the Permission Levels area.

Table of Contents

Add a New User

Follow the steps below to add a new user to the system.

1. Click the Users tab in the top navigation.
2. Click Add User just below the main navigation.
3. Fill in the fields. See the User Fields section of this document for more information.
4. Click Save.

Edit a User

1. Click the Users tab in the top navigation.
2. Find the user you wish to edit either by scanning through the left navigation or using the search function also in the left navigation in its own tab.
3. Update the user's information. See the User Fields section of this document for more information.
4. Click Save.

Delete a User

1. Click the Users tab in the top navigation.
2. Find the user you wish to delete either by scanning through the left navigation or using the search function also in the left navigation in its own tab.
3. Click Delete.

User Fields

User Properties

User Name (required): The user name is the email address of the user. This field must be a valid email address. The system will use this information to communicate to the user via email.

First Name and **Last Name (both required):** Enter the user's name.

Password (required): The password that the user will use to gain access to the system. The password must be between 5 and 15 characters.

Active : Click this checkbox to enable the user to login to the ESM. You can use this to temporarily prevent a user from logging in.

Company : The company at which the user works. Not used for anything other than pure recordkeeping.

Home Phone : The user's home telephone.

Mobile Phone : The user's mobile telephone.

Fax : The user's fax number.

User Address

Line1, Line2 : The user's address as it would appear below the name.

City : The user's address City.

State : The user's address State.

Country : The user's address Country.

Postal Code : The user's Postal Code (or zip in the US).

Common Error Messages

"This user is the page owner for page "[name of some page here]" of site "Consumer" and therefore may not be set as not active."
Users may be assigned as page owners in the Pages area of the site. This is a critical association of the site. Page owners must be active participants in the site and therefore may not be set as inactive or deleted. If you do wish to perform this action, then you will need to update each page where this user is the owner and remove the association.

"The Username must be a valid email."
The username you entered is either blank or not a valid email address.

"This Username is already taken, please choose another."
Usernames are used throughout the system to identify people and therefore must be unique for the system to work correctly.

Table of Contents

Introduction to Permission Levels

This section discusses how to manage Permission Levels for accessing SpireESM. Permission Levels are general groups of capabilities that can be assigned to individual users.

This training document will cover creating, modifying and removing Permission Levels from the SpireESM.

Note: A user must already exist in the Users area before being added to a permission.

Note: To act in the Permission Levels area, a user must have the appropriate rights granted through a Permission Level.

Create a Permission Level

1. Click the Permission Levels tab.
2. Click the Add Permission Level link below the main navigation.
3. Choose a Permission Level Name. Make this descriptive as to what actions this Level will enable to avoid confusion and or duplication.
4. In the Properties accordion which defaults to open, choose the actions that will be enabled by this group.
5. See Add or Delete a User to a Permission Level for managing the users that have rights to this area.
6. Click Save.

Important Note: The View checkbox for each property denotes access to the area. Unchecking this box, means that the users of this permission level will not see this respective area in their menu.

Edit a Permission Level

1. Click the Permission Levels tab.
2. Find the Permission Level that you wish to edit by either finding it in the list in the left navigation or using the search feature also in the left navigation.
3. Edit the Permission Level Name. Make this descriptive as to what actions this Level will enable to avoid confusion and or duplication.
4. In the Properties accordion which defaults to open, update the actions that will be enabled by this group.
5. See Add or Delete a User to a Permission Level for managing the users that have rights to this area.
6. Review the History of this Permission Level by opening the History accordion.
7. Click Save.

Important Note: The View checkbox for each property denotes access to the area. Unchecking this box, means that the users of this permission level will not see this respective area in their menu.

Add or Delete a User in a Permission Level

Users get added to Permission Levels to give them privileges to perform actions in the ESM. Add a user in the Users accordion of the Add or Edit screen.

To **add a user**, follow these steps:

1. Add or Edit a Permission Level.
2. Find the Users accordion area.
3. Open the Add a User to This Permission Level select box by clicking on it.
4. Find the user in the list and click on that line item. The user should appear below the Select box.
5. Continue editing or click Save to save your work.

To **remove a user** from the list, follow these steps:

1. Add or Edit a Permission Level.
2. Find the Users accordion area.
3. Find the user in the list below the Add a User to This Permission Level select box and click on delete icon next to the users name. The user should disappear from the list.
4. Continue editing or click Save to save your work.

Note: You must click save for your changes to take effect. To add all available users to the permission level, click the Select All link below the Select box. To remove all users, click the Clear All link below the Select box.

Delete a Permission Level

To delete a Permission Level, follow these steps:

1. Click the Permission Levels tab.
2. Find the Permission Level that you wish to delete by either finding it in the list in the left navigation or using the search feature also in the left navigation.
3. Remove any users in the Permission Level by entering the Users accordion and removing all users from the list. Save the Permission Level.
4. Click the Delete button.

Common Error Messages

"There are users in this group. Please delete them before deleting this group"
There may not be any users in the Permission Level for the delete action to occur. If you are certain that you wish to delete this Permission Level, remove all users from the local Users accordion area and then Save the Permission Level. Then use the delete button to delete the Permission Level.

Note: Users who have no permission levels cannot perform any actions on the site. Make certain that if you remove a Permission Level, to reassign all of the users to different Permission Levels.

Introduction to Content Groups

This section discusses how to manage Content Groups within the SpireESM. A Content Group is a group of users who share rights to a set of pages.

An individual can belong to multiple Content Groups, thereby giving them varying degrees of permissions.

Adding a user to a Content Group gives that individual access rights to the pages specified in the Site Pages field of the Properties accordion.

Adding to the Site Pages field gives the user access to that page and all child pages.

Table of Contents

Add a Content Group

To add a content group, follow these steps:

1. Click the Content Groups tab in the top navigation.
2. Click the Add Content Group link right below the top navigation.
3. Update the fields of the form. See the Section Form Fields and the Common Error Messages area for more info.
4. Click Save.

Edit a Content Group

To edit a content group, follow these steps:

1. Click the Content Groups tab in the top navigation.
2. Find the Content Group that you wish to edit by either finding it in the left navigation or by using the search tab also in the left navigation.
3. Fill in the fields of the form. See the Section Form Fields and the Common Error Messages area for more info.
4. Click Save.

Section Form Fields

In the **header.**

Content Group Name: This is the name of the content group. Enter a name that relates to the type of role that users will be associated with for this content group.

In the **Properties** Accordion.

Description: A short description of the purpose of this group.

Site Pages: This is the list of pages that users in this content group will be able to access. Pages inherit down so if you select the home page as one of the pages, then since all pages inherit from this one, users associated with this group will have access to all pages.

In the **Users** Accordion.

Users in Content Group: This is the list of users associated with this Content Group. If a user is selected in the list, then that user will have access to the area selected in the Site Pages form field.

In the **Asset Groups** Accordion.

Asset Groups: This is the list of asset groups associated with this Content Group. If an asset group is selected in the list, then that user will have access to the assets associated with that asset group.

The **History** Accordion.

Open this accordion to see recent history pertaining to this module.

Delete a Content Group

To delete a content group, follow these steps:

1. Click the Content Groups tab in the top navigation.
2. Find the Content Group that you wish to edit by either finding it in the left navigation or by using the search tab also in the left navigation.
3. Click the delete button at the top of the page. See theCommon Error Messages area for more information.

Common Error Messages

There are users in this group. Please delete them before deleting this group.
Content Groups may not be deleted until they have no users associated. To delete a content group, first remove all users and then save it. Then use the delete button.

The Content Group Name is required.
Content Groups must have names so that they can interact with other sections of the site. Please fill in the Content Group Name field.

Introduction to Pages

This section discusses how to manage the owner editable pages within your site.

One **key concept** is that each page name builds the site navigation in aggregate.

So, the Home page is by default the root of the site (http://YourSite.com/) and if one were to add a page under the home page with the name *About Us*, the url for accessing this page would then be http://YourSite.com/AboutUs/. Another page added as a child of the *About Us* page, perhaps named *Directors,* would then be accessed as http://YourSite.com/AboutUs/Directors/. So, consider the site as a series of nested pages connected by their names instead of files within directories. This concept achieves completely clean urls.

Additionally, each group of pages under a parent has an order property. This is available as a means of managing the menu and submenus of the site. The order that the pages appear in the left navigation of the Pages area is the same as will appear in the menus and submenus of the site.

More information on specifically managing the site page structure is available here.

Table of Contents

Creating New Pages

To create a new page, you will need rights from the Permissions Level and Content Groups modules.

1. Click the Pages tab.
2. Click the Add Page button below the tabs to open the pages form.
3. Fill in the fields as per the Form Field Definitions section.
4. Click Save.
5. The page will then appear in your Draft Pages list signifying that it has not been published. The page will not appear in the left navigation which only contains published pages. You can then access the page and continue editing.
6. Edit the page content objects as per section Embedding and Editing Content Objects on a Page.
7. Publish the page or have someone with publish permissions do it for you.

See the Common Error Messages section of this document if you are getting an error that is not self explanatory.

Back to top

Editing Pages

To edit a page, you will need rights from the Permissions Level and Content Groups modules.

1. Click the Pages tab.
2. Find the page you wish to edit in the left navigation. If you cannot find it, use the search feature also in the left navigation. The page may also be in the Draft Pages area reachable in the top navigation.
3. Edit the page fields or the content objects as per section Embedding and Editing Content Objects on a Page.
4. Click Save or publish the page or have someone with publish permissions publish it for you.

See the Common Error Messages section of this document if you are getting an error that is not self explanatory.

Back to top

Delete a Page

To delete a page, you will need rights from the Permissions Level and Content Groups modules.

1. Click the Pages tab.
2. Find the page you wish to delete in the left navigation. If you cannot find it, use the search feature also in the left navigation. The page may also be in the Draft Pages area reachable in the top navigation.

3. Click the Delete button and click 'ok' when asked to confirm.

Note : Pages that are currently linked from other esm-managed pages cannot be deleted. Attempts to do so will result in an error message describing the page that contains the link. If you are certain that you wish to remove the page, do so on the page in the warning message and then follow these steps again.

See the Common Error Messages section of this document if you are getting an error that is not self explanatory.

Back to top

Form Field Definitions

Here is information on the functionality of each field.

In the **Properties** Accordion

- Give the page a **name**. This name will be the default page title unless overridden in the page's *pagetitle* content area.
- Type in the **page url**. This url must be unique under the page parent and should contain only letters, numbers, and hyphens.
- Fill in the **browser title** field. Anything entered here will appear in the browser's title bar (usually in dark blue).
- Use the **redirect** field if you wish for this page to redirect to another. For instance, if you added the following page: http://YourSite.com/AboutUs/ and filled in the redirect as /ContactUs/, any user browsing the *About Us* page would be redirected to the *Contact Us* page.
- Next, choose a **template**. It is critical to choose the right template to maintain site look and feel. Templates are usually meaningfully named.
- Choose the new page's **parent**. For instance, if you created a *Directors* page and wished for it to be under the *Contact Us* page, select *Contact Us*. Every page, except the *Home* page, needs a parent.
- Check the **display in navigation** checkbox, if the page name should appear in navigational menus.
- Select a page **owner**. As a default, the page owner will be inherited from the parent's page owner.
- Check the **index by site search** checkbox, if the page should be indexed for the site search.
- Check the **designate as Sub-Site Landing Page**, if this page will be the landing page of a sub-site, or micro-site. The navigation and breadcrumbs of this page's children will use this page as the base node.

In the **Page View** accordion

- Edit the page content objects as per section Embedding and Editing Content Objects on a Page.

In the **Page Expiration** accordion

- The **Page Appears** date can be set to control when a page is first available for viewing.
- The **Page Expires** date can be set to control when a page is made unavailable for viewing.

In the **Meta Data** accordion

- The **Description** field populates the html meta data tag for current page. This is mostly relevant to search engines. Some search engines will include the information here in their search aggregate, others will display it or a section of it as part of the search results.
- The **Keywords** field is similar to the Description field but is less relevant. It is a good practice however to fill it with search keywords.
- The **Search Results Description** populates the system's search results. So, when someone uses the site search, any page that occurs in the results will have this content as a short paragraph below a link to the page.

In the **Link Info** accordion

- The absolute url path of the published page is displayed.
- The cross linking format for this page is displayed for linking from other esm-managed pages or sites. The format is: {{link[**siteid**][**pageid**]}}, where **siteid** and **pageid** are to be replaced with the respective id of the site and page.

In the **Page Restrictions** accordion

- Not applicable in the default installation of the ESM. Can be customized to implement front-end user page restrictions.

In the **Keyword Analysis** accordion

- Calculate the number of times keywords appear on the page. Key Phrases can be added under the SEO tab.

In the **Page History** accordion

- Open this accordion to see recent history pertaining to this module.

Back to top

Embedding and Editing Content Objects on a Page

This section describes how to manage content and modules within a page.

Key Concept: Each page uses a **template** that has references to site **Modules** embedded within **Content Areas**. Some of these content areas allow for the user to interact and select the **Module** that contributes to the page content.

A **Module** is a component of the site that generates content for pages.
A **Content Area** is a specific spot in a template that is coded to accept modules.

Here are some common examples of Modules that come with the default ESM.

- **HTMLContent** for managing freeform html content.
- **SimpleContent** for managing short pieces of text that should have no html.
- **Assets** for displaying documents that have been uploaded to the ESM via the assets module.
- **Form** for embedding user-submitable forms created in the forms area of the ESM.

Depending on the level of customization, more modules may be available.

The process for managing these areas is as follows:

1. Start by editing a page. The *Page View* accordion is as a default open and will show a view of the page being edited.
2. Some pages may have areas of content labeled *hints* that will not appear on the published site.
3. Mouse over the page window and note that certain areas will highlight with a blue background and be clickable. Some of these areas will have a short piece of text identifying the name of the content area. Areas like this are open content areas that do not have a module embedded. Alternatively, some larger areas of text will highlight. These are then content areas that do have a module embedded. The content that was highlighted is generated by the module that is embedded in that content area.
4. Click on these blue highlighted areas to edit them.

If you clicked on a content area that already has a module embedded, that module will then directly open to its configuration window.

Otherwise, a window will open that will allow you to select from a list of modules to embed. Choose one and then click the Save button to embed that module in that content area.

Each module will have some sort of configuration window. For example, the HTMLContent module will have a wysiwyg tool for you to enter content. The Form module will present a list of forms configured in the ESM form tool for you to select.

Important Note: Any changes you make in the configuration window will not take effect until you click the Save button.

Second Important Note: Any changes to page level module configurations will not take effect on the site until that page is published. However, changes in the modules will take effect immediately. For example, if you update a form in the Forms tab that is embedded on multiple pages, that form will immediately change on any pages that have it embedded on the site.

Third Important Note: All modules will have a Delete button at the top of the module configuration window. This button serves the purpose of removing this module from this content area. Use it to completely clear a content object or to repurpose it by loading a different module.

Back to top

Manage the Site Structure

To perform actions that change the page structure, you will need rights from the Permissions Level and Content Groups modules.

Most of the site structure can be seen in the left navigation of the Pages area although some components may generate their own pages that will not appear here.

The site is best conceptualized as a tree of pages. Each page is a sort of branch that may have its own child branches. In this analogy, the home page is the trunk of the tree. For more information on this concept, see the introduction of this help document.

There are two ways in which this tree structure can be changed.

Change the page parent relationships

The first option is to alter the parent child relationship of pages. This is managed through the parent field in the properties accordion of the Pages section. If you wish to move a page from one section to another, you would take the following steps :

1. Edit the page that you wish to move.
2. Enter the Properties accordion pane and click the Parent dropdown field.
3. Choose the new parent that you wish this page to be a child of.
4. Click Save.

Note: Moving a page to a new parent will add this page as the last page under this parent.

Warning: Altering the structure takes effect immediately on the public site. You do not need to publish the page for it to take effect.

Reorder the pages

The second option for managing the site structure is reordering pages under the same parent. This is available as a means of managing the order of the pages in menus and submenus and anywhere else the site structure is exposed to the viewer.

To change the order of the pages under a single parent, take the following steps:

1. Edit the page that you wish to move.
2. At the top of the page, you will see Up and Down Buttons if you have the permissions to perform this action.
3. Click the appropriate one and see the change occur in the left navigation of this area.

Warning: Altering the structure takes effect immediately on the public site. You do not need to publish the page for it to take effect.

Back to top

Introduction to Workflow

Workflow is the idea that site content should be managed via a process that enforces roles and responsibility for content. This is most useful when the responsibilities of content creation and content editing/publishing are well established.

For this to work in the ESM, the system must be setup properly. This is done by carefully designing Permission Levels and Content Groups and assigning users to them depending on their role in the task of site content creation.

Users should generally be thought of as content creators or content editors. Editors often have publishing rights but not necessarily. At the very least, one content editor must have publishing rights (or nothing will ever get published). Usually, Permission Levels are created along these lines of distinction.

Content Groups are then assigned to users as a means of localizing the areas of the site on which they can act.

Another component of it is the assignment of **users as page owners.** This is set while editing a page in the Properties accordion with the Owner field.

It makes the most sense for a user assigned as a page owner to fall in the content editor and or publisher type role. This in conjunction with the structure of the sitemap establishes a chain of authority.

Important Concept: When a page is assigned an owner, that owner has symbolic ownership rights over that page and any below it in the sitemap tree structure. That owner effectively inherits ownership over that subsection of the site.

The general flow of this is as follows:

1. A content creator creates content on a page on the site.
2. That content creator uses the Request Review button to signal to the page Owner that this page is ready to be reviewed. (Actually the content creator is presented with all page owners including any above the current page. The closest content

Owner is preselected.)

3. The content editor receives a message from the ESM that a page is ready to be reviewed. The page is reviewed and the editor can then act in three different ways.
    - The content is not satisfactory. The editor can use the Send Feedback button to send a message back to the content creator.
    - The content is satisfactory but the editor does not have publish permissions. The editor can use the Request Review button to signal to the next page Owner in the site hierarchy to review the page.
    - The content is satisfactory and the editor has publish permissions. The editor can publish the page. Everyone in the workflow gets notified.

This process defines the lifecycle of how content is created, evaluated and published to the live site.

Back to top

Content Revision

Select the Content Reversion link directly below the esm navigation.

Common Error Messages

"The Page URL should only contain letters, digits, or hyphens. No spaces please."
Page urls are critical components of how the system works. The page urls of the page and its parents create the absolute site url structure. Because of this, only url safe characters are allowed in this field.

"The Parent Page may not be this page."
All pages must have a parent such that they fit in the logical site hierarchy. The only exception to this rule is the home page. Please select a parent in the Parent field of the Properties accordion. This error message also displays if a user, who does not have access to a specific page, selects it as a parent.

Back to top

Table of Contents

Introduction to Assets

The Assets module is used to make file based assets such as word documents, excel spreadsheets, Adobe pdf documents, jpg and gif images, or any other type of document available on the ESM, easy to manage.

Once a document has been uploaded to the Assets module, it will be available to the embeddable assets module. (find more information on embedding modules here)

The embeddable assets module has two modes - both of which show assets first with an icon as to what type of file it is, followed by a link to download the asset, finished by the size of the asset.

The first mode displays a list of user selected assets. The second mode is used to embed a list of all of the assets in an Asset Group. Use this mode to make available a list of related documents.

Important Note: Assets uploaded with either the .jpg or .gif extension will be available in html wysiwyg editors in the image editor in the image list. i.e. If you want to make an image available for use on the website, upload it to the assets and find it in the image list of the images editor.

Important Note: Assets with the extension .doc(x) or .xls(x) or .pdf will be incorporated into the site search.

VERY IMPORTANT NOTE : Do not upload sensitive documents such as those containing social security numbers, credit cards, company secrets, etc.

Add an Asset

To add an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Click on the *Add Asset* link just below the main navigation.
3. Fill in the Assets fields. For more information, see the Asset Field List section of this document.
4. Click *Save* to commit your new asset.

The asset will now be visible when the Asset Group is opened in the left navigation of this module. It will also be available in pages to be embedded (more info on embedding modules here) and in the image manager of the HTML editor.

Edit an Asset

To edit an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the asset that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the Assets fields. For more information, see the Asset Field List section of this document.
4. Click *Save* to commit your changes.

The edit screen also has a *download* and *history* accordion. Use these to either download the asset for personal review or to see the assets individual history.

Delete an Asset

To delete an asset, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the asset that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the asset.

Note : Assets that are currently individually embedded in pages cannot be deleted. Attempts to do so will result in an error message describing the page that contains the asset. If you are certain that you wish to remove the asset, do so on the page in the warning message and then follow these steps again.

Assets Field List

Asset Name : The asset name is the handle that you will use to identify the asset. Name it appropriately such that it can be easily identified. This name will appear while embedding assets in pages (more info here), and in the html page image editor. This field is used as the title of the document in the search results.

Asset Group: The asset group is the list to which the asset belongs to. Select the asset group that is relevant for your asset. To add a new asset group, see the instructions here.

Show Date and Hide Date : Use these date fields to control the assets visibility by time. For instance, you could set an asset to appear on the site only after or before a certain date depending on business needs.

Search Results List Description : This snippet of text will appear in the search results list. When an asset is found by the search, it will display it to the user in a list format. The description will be shown below the title in this list. Keep this field short - 2 or 3 sentences. Make certain that someone who is searching will know if this is the right document.

File : This is the actual asset. Find the file on your computer or network by clicking on the *browse* button to open a local file browser. Allowed file types include .doc, .xls, .pdf, .jpg, .gif, and .png.

Note : This field only controls visibility in terms of links from the site and search. The asset will still be downloadable by direct http request.

Introduction to Asset Groups

Asset Groups are a means to categorize assets. In the assets area, the groups appear as the categories that assets are stored under in the navigation.

Assets groups are also a part of security.

Add an Asset Group

To add an asset group, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Click on the *Add Asset Group* link just below the main navigation.
3. Fill in the fields. Each group must have a unique name. Add a short description that will serve as a reminder.
4. Click *Save* to commit your new Asset Group.

The new Asset Group will now be visible when creating assets and in the *Content Groups* edit view in the *Asset Groups* accordion.

Edit an Asset Group

To edit an asset group, follow these steps:

1. Click on the *Assets* tab in the main navigation.
2. Find the Asset Group that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the Assets Group fields. Each group must have a unique name. Add a short description that will serve as a reminder.
4. Click *Save* to commit your changes.

Delete an Asset Group

To delete an asset group, follow these steps:

1. Click on the *Assets Group* tab in the main navigation.
2. Find the Asset Group that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the Asset Group.

Note : Asset Groups that have assets assigned in the Assets area may not be deleted. Attempts to do so will result in an error message. If you are certain that you wish to remove the Asset Group, please reassign the assets to other groups and then try again.

Bulk Upload

Bulk upload is used to upload multiple assets at once as a means of saving time. The bulk upload accepts a zip file whose specially formatted folder structure gets parsed by the system and rendered into assets.

The system will attempt to match asset groups found in the zip with existing asset groups by name. When a match is found, assets will be loaded to the matched group. If it does not find any matches, the system creates a new asset group.

The system will also try to match assets by name as well when nested in found asset groups. If an asset is matched it will update the asset file.

To create an uploadable zip file, follow these steps.

1. Create an empty working folder whose contents you will use for this purpose.
2. In that folder, create subfolders representing the asset groups that you want to upload. The name of the asset group will be either the text contents of a file named "assetgroupname.txt" directly in that folder or if that is not found, the name of the folder with underscores converted to spaces. The assetgroupname.txt file is optional - use it if you want the asset group name to have more complex characters than is supported by file system folder names i.e. slashes .etc.
3. In those subfolders that represent asset groups, add files that you want available as assets. The name and description of the file will be taken from the file name with underscores converted to spaces. The eventual asset file name will have spaces converted to underscores for safe web use. Each file in that folder will then become an asset in that asset group.
4. When you have created the folders that you want to upload, highlight them all and zip them up with your favorite zip program. Typically, you should be able to highlight them in window explorer >> right click the highlighted >> Add to archive >> check zip radiobox >> OK. The zip file when explored should have directly at its root the folders representing assets. Once the zip file is created, confirm by exploring it and seeing the folders representing asset groups at the root.

The format of the zip file is as follows:

- zipfile
    - (folder at zip root) name of asset group
        - (optional file) assetgroupname.txt
        - (file) asset to be associated with asset group
        - (file) another asset to be associated with asset group
        - (more files)
    - (folder at zip root) name of another asset group
        - (optional file) assetgroupname.txt
        - (file) asset to be associated with another asset group
        - (file) another asset to be associated with another asset group
        - (more files)
    - more asset groups etc.

To bulk upload a zip file:

1. Click on the bulk upload link in the assets area. (you'll need the right permissions)
2. Click the "Browse" button and find the zip file on your system.
3. Click the "Upload button".
4. The system will then validate the zip file, load the files, give feedback in the usual feedback spot, and then refresh the left navigation. If validation fails, the system will try to give feedback on what is wrong with it.

Introduction to News

The News module is not a core module of the SpireESM, but it can be quickly integrated to make publishing news items easy.

Once a news item has been created in the News module, it will be available to the embeddable news module. (find more information on embedding modules here)

The embeddable news module displays a list of all news items in a user-selected News Type.

Note: Only news items that meet the show/hide date criteria (or those left blank) will be displayed.

Table of Contents

Add News

To add a news item, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Click on the *Add News* link just below the main navigation.
3. Fill in the News fields. For more information, see the News Field List section of this document.
4. Click *Save* to commit your news item.

The news item will now be visible when the News Type is opened in the left navigation of this module.

Edit News

To edit a news item, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Find the news that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the News fields. For more information, see the News Field List section of this document.
4. Click *Save* to commit your changes.

The edit screen also has a *history* accordion. Use this to review the news item's individual history.

Delete News

To delete a news item, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Find the news that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the news.

News Field List

News Name (required) : The name is the handle that you will use to identify the news. Name it appropriately such that it can be easily identified.

Rss and List Item Title (required) : The title will appear as the title of the news item in the news section and search results.

Search and RSS Description (required) : This snippet of text will appear in the search results list. When a news item is found by the search, it will display it to the user in a list format. The description will be shown below the title and item date in this list. Keep this field short - 2 or 3 sentences. Make certain that someone who is searching will know if this is the right news item.

News Type (required) : The news type is the group to which the news item belongs to. Select the news type that is relevant for your news item. To add a new news type, see the instructions here. The news type will appear while embedding news in pages (more info here).

Item Date (required) : The news item date will appear along with the news title in the news section and search results.

Show Date and Hide Date : Use these date fields to control the news visibility by time. For instance, you could set a news item to appear on the site only after or before a certain date depending on business needs.

News Item Content : This is where the body of the news item is entered. Use the wysiwyg editor to style your content.

Introduction to News Types

News Types are a means to categorize news items. In the News area, the types appear as the categories that news items are stored under in the navigation.

Add a News Type

To add a news type, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Click on the *Add News Type* link just below the main navigation.
3. Fill in the fields. Each news type must have a unique name. Add a short description that will serve as a reminder.
4. Click *Save* to commit your News Type.

The News Type will now be visible when creating news items.

Edit a News Type

To edit a news type, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Click on the *View News Type* link just below the main navigation.
3. Find the News Type that you wish to edit by finding it in the left navigation.
4. Update the News Type fields. Each type must have a unique name. Add a short description that will serve as a reminder.
5. Click *Save* to commit your changes.

Delete a News Type

To delete a news type, follow these steps:

1. Click on the *News* tab in the main navigation.
2. Click on the *View News Type* link just below the main navigation.
3. Find the News Type that you wish to delete by finding it in the left navigation.
4. Click *Delete* to delete the News Type.

Note : News Types that are currently embedded in pages cannot be deleted. Attempts to do so will result in an error message describing the page that contains the news. If you are certain that you wish to remove the news, do so on the page in the warning message and then follow these steps again.

Introduction to Forms

The forms area addresses the need for the ESM end user to be able to create end user submittable forms on managed sites. Users can receive form submissions by email and or view previous submissions in the ESM.

Summary : Forms are created in the ESM, in the forms area, and then become accessible to pages as embeddable objects. One form can be embedded in multiple places on the site.

Table of Contents

Adding a form

To add a form to the system, follow these steps.

1. Click the Forms tab in the main ESM navigation.
2. Click the "Add Form" link directly below the main ESM navigation.
3. Fill in the form fields. See the Form Fields section of this document for more info on the purpose of each field.
4. Click Save.

Note : When a form is saved, changes will be immediately updated on any embedded form on the site. Data submitted before the change will still be available in the submitted Form Data section of the site.

Update a form

To edit a form in the system, follow these steps.

1. Click the Forms tab in the main ESM navigation.
2. Find the form that you wish to edit by locating it in the left nav or using the search feature also in the left area.
3. If you wish to update for properties of the form, update the fields as per the Form Fields section of this document. If you wish to update the fields presented to the end user, see the Creating the form structure section of this document.
4. Click Save.

Note : When a form is saved, changes will be immediately updated on any embedded form on the site. Data submitted before the change will still be available in the submitted Form Data section of the site.

Delete a form

To delete a form in the system, follow these steps.

1. Click the Forms tab in the main ESM navigation.
2. Find the form that you wish to delete by locating it in the left nav or using the search feature also in the left area.
3. Click Delete.

Note : A form may not be deleted if it is currently embedded in a page. Clicking delete on an active form will result in an error message that will notify you of the page on which the form is embedded. Remove the reference in that page and then come back and delete the form.

Form fields

This section describes the fields in the *Properties* accordion available when adding or editing a form. To learn more about creating the form structure visible to the end user, see the Creating the form structure section of this document.

Form Name : The form name is the unique handle that is referenced while embedding a form in a page or when identifying form submissions in the submitted Form Data area.

Email Recipient : A valid email. Submitted forms will be sent to this email address. Currently only supports a single recipient.

Form Submission Reply : This is the text that a user will see after submitting the form. The page will reload and the text will be displayed above the form.

Creating the form structure

To edit the form structure, follow these steps.

1. Click the Forms tab in the main ESM navigation.
2. Find and edit the form that you wish to edit by locating it in the left nav or using the search feature also in the left area.
3. In the *form content* accordion, either click on the existing forms or in the upper left of the gray box on the blue highlighted area. This should open the form editor.

The form editor has two columns. The first is where you choose the control from. The second is where you see what the form will look like.

Use the first column as a toolbox of icons that you can drag over to the content area.

Once the icon is dropped into the content box, it will go to the bottom of the list. The item will then be dragable via its red drag handle. Use this feature to order the fields of the form.

Also note the delete icon to the right of the drag icon. Use this to remove this field from the form.

Once the item is in the right order, you will be able to configure it.

Field Configuration

All fields:

> **Make Required :** All fields can be made required or optional by checking or unchecking this checkbox. Checking it will generate client-side form validation.
>
> All fields have a label. This label will appear to the left of the form when displayed. To activate the label, click on the text. It will highlight and then turn into a textbox with an *Ok* Button. Enter some text for the label of the field and click *Ok* to save it.

Options for Select Menu, Radio Group, and Checkbox Group :

> The select, radio, and checkbox field types can have multiple preset options. Configure these by using the *Add* or *Remove* items.
>
> To add an option, click on the text. It will highlight and then turn into a textbox with an *Ok* Button. Enter some text for the label of the option and click *Ok* to save it.
>
> To add more options, click Add next to the last option and repeat the instruction above.

Click the *Save* button to commit your changes.

Embedding a form in a page

To learn more about embedding modules in pages, see the Pages -> Embedding objects document.

Viewing form submissions

To view form submissions, follow these steps:

1. Click the Forms tab in the main ESM navigation.
2. Click the *Form Data* link just below the main navigation.
3. Locate in the first column the form for which you wish to see submissions by the form name.
4. View the form submissions by clicking on either the xls or xml links on that same line. The xls link will open an xls spreadsheet. The xml link will open an xml document that can be used in with other programs.

Note : If the form structure of the document was changed, then the xls document may not format correctly. Use the xml link in this case.

Table of Contents

Introduction to Events

The Events module is not a core module of the SpireESM, but it can be quickly integrated to make publishing events easy.

Events can be embedded in pages (find more information on embedding modules here). The embeddable events module displays a list of all events.

Note: Only events that meet the start/end date criteria (or those left blank) will be displayed.

Add Event

To add an Event, follow these steps:

1. Click on the *Events* tab in the main navigation.
2. Click on the *Add Event* link just below the main navigation.
3. Fill in the Events fields. For more information, see the Event Field List section of this document.
4. Click *Save* to commit your event.

Edit Event

To edit a event item, follow these steps:

1. Click on the *Event* tab in the main navigation.
2. Find the event that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
3. Update the Event fields. For more information, see the Event Field List section of this document.
4. Click *Save* to commit your changes.

The edit screen also has a *history* accordion. Use this to review the event item's individual history.

Delete Event

To delete a event item, follow these steps:

1. Click on the *Event* tab in the main navigation.
2. Find the event that you wish to delete by either finding it in the left navigation or using the search function also in the left navigation.
3. Click *Delete* to delete the event.

Event Field List

Event Name (required) : The name is the handle that you will use to identify the event. Name it appropriately such that it can be easily identified.

Title (required) : The title will appear as the title of the event item in the event section and search results.

Start Date and End Date : Use these date fields set the event date(s).

Location : This is where the Event Location will be entered. Use a standard address format, similar to the format found on mailings.

Description : This is where the body of the event item is entered. Use the wysiwyg editor to style your content.

Map Link : Use this field to add a link to a map from any mapping site. (ie: http://maps.google.com/, http://maps.yahoo.com/, http://maps.yahoo.com/, etc.) A link titled "Map" will be displayed under the agenda link, which is under the description.

Agenda Asset : Available assets will appear in this drop down list. You may select an asset that is related to the event. The asset will appear below the description as a link titled "Download the Agenda".

Active : If checked the event will be accessable on the web site. If left unchecked the event will not be accessable on the web site.

On Home Page : If checked, the event will be listed on the Home Page and on the Events Page. If left unchecked, the event will be listed only on the events page.

Show Addtl. Attendees : If checked, the registering attendee will be able to list additional attendees that will be attending with them. If left unchecked the registering user will not be able to list additional attendees.

Table of Contents

Introduction to Galleries

The galleries module allows Gallery Groups to be created where uploaded Images are associated to the created Gallery Groups. Each Gallery Group comprises an 'Image Gallery', which may be included as modules on pages.

To **Embed** a **Gallery** in a page, refer to Embedding and Editing Content Objects on a Page. Gallery types are named descriptively. Custom gallery designs can be produced on request.

Add Gallery Group

To add a Gallery Group, follow these steps:

1. Click on the *Gallery* tab in the Main Navigation.
2. Click on the *Add Gallery Group* link under the Main Navigation.
3. Fill in the Gallery Group form fields. For more information, see the Gallery Group Form Field Definitions section of this document.
4. Click *Save* to add the Gallery Group.

Form Field Definitions (Gallery Group)

- **Gallery Group Name:** This is the name that will appear as the title of the gallery on the public/internal facing web site.
- **Description:** This is a brief description of the forum. This should be no longer than three sentences.

Page History Accordion

- Open this accordion to see recent history pertaining to this module.

View Gallery Groups

To view Gallery Groups, follow these steps:

1. Click on the *Gallery* tab in the Main Navigation.
2. Click on the View Gallery Groups link under the Main Navigation.

Recent Site Activity Accordion:

- Open this accordion to see recent history pertaining to this module.

Edit Gallery Group

To edit a Gallery Group, follow these steps:

1. Click on the *Gallery* tab in the Main Navigation.
2. Click on the View Gallery Groups link under the Main Navigation.
3. Find the Gallery Group that you wish to edit by either finding it in the left navigation or using the search function also in the left navigation.
4. Update the Gallery Group fields. For more information, see the Gallery Group Form Field Definitions section of this document.
5. Click *Save* to commit your changes.

History Accordion

- Open this accordion to see recent history pertaining to the selected Gallery Group.

Add Gallery Image

To add an Image to a Gallery Group, follow these steps:

1. Click on the *Gallery* tab in the Main Navigation.
2. Click on the Add Gallery Image link under the Main Navigation.
3. Update the Gallery Image fields. For more information, see the Gallery Image Form Field Definitions section of this document.
4. Click *Save* to commit your changes.
5. Click *Upload Image* to add the image file.

6. Click *Browse.*
7. Select the file you wish to upload.
8. Click *Open*.
9. Click *Upload.*

Form Field Definitions (Gallery Image)

- **Image Name:** This is the name that will be displayed for the image *only in the ESM*.
- **Title:** The image title is the text that will appear with the Image when it is displayed in the gallery to the end user.
- **Description:** This is a brief description of the image. This should be no longer than three sentences. This is for internal use only, but may be customized to display in gallery by request.
- **Sort Date:** Images appear in Gallery Groups from first to last by the Sort Date. It is recommended that the sort date be set to the date that the image was added so the images will appear chronologically in the Galleries.
- **Associated Groups:** Here, you will select the Gallery Group(s) that the Image will be associated with. Images can be added to any one, combination of, or all group(s) via the Associated Groups field. To add an image to an individual Gallery Group, select a Gallery Group from the drop down list of Gallery Groups. To add an image to a combination of Gallery Groups, repeat the process of adding an individual Gallery Group for each Gallery Group that you wish to add the image to. To add the image to all Galley Groups, click the *Select All* link below the drop Associated Groups down list. When Gallery Group(s) is/are selected it/they will automatically be added to a list that will appear below the drop down list. To remove an individual Association, click on the red 'x' icon to the left of the Gallery Group name in the list below the drop down list. To remove all Associations, click the *Clear All* link below the drop down list.

View/Edit Gallery Image

To view an Image, follow these steps:

1. Click on the *Gallery* tab in the Main Navigation.
2. Click on the Gallery Group accordion tab in the left navigation to expose its associated images. (NOTE: The list of Gallery Groups is in Alpha/Numeric order. The first Gallery Group will, by default, be expanded)
3. Click on the Name of the Image that you wish to View/Edit.

Properties Accordion

1. Update the Gallery Image fields. For more information, see the Gallery Image Form Field Definitions section of this document.
2. Click *Save* to commit your changes.

Edit Image Accordion

NOTE: When the edit actions are taken, the changes are automatically saved to the database. There is no need to click *Save*.

1. **Revert To Original**
   - The image can be reverted to the stat it was in when it was uploaded by clicking *Revert Image*.
2. **Rotate**
   - To rotate the image, use either of the *Rotate* buttons. The buttons will rotate the image 90 degrees Clockwise (CW) of Counter Clockwise (CCW) respectively.
3. **Crop**
   - To Crop the image, click and drag over the image the area that you wish to retain. Release the left mouse button. The outlined area created by the cropping tool will be all that remains of the image. If satisfied with crop area, click *Crop*. If not satisfied, repeat the steps until you are satisfied with the preview.

View Images Accordion

- The View Images Accordion will show the image in the sizes which exist on the server. The sizes that display to the user are dependant to the Gallery Type that is selected when adding a Gallery to a page.

History Accordion

- The History Accordion will show the history of changes to the Image.

Table of Contents

Introduction to SEO

The SEO module is used to optimize search engine indexing of your site. Accurate identification, selection and placement of the key words and key phrases on your site will be the determining factor for the rankings the search engines. Spire ESM takes care in placing the key words and key phrases for you. Key words and key phrases are the words on your web site that will generate 'hits' when entered in search engines such as Google or Yahoo. Increasing targeted traffic generally increases business. Your only concern should be with what key words and key phrases are the best key words and key phrases. If you are unsure, Spire Media offers analytics and optimizations services.

Edit Key Phrases

To edit a Key Phrase, follow these steps:

1. Click on the *SEO* tab in the main navigation.
2. Click on the *Edit Key Phrases* link just below the main navigation, or in the left side sub-navigation.
3. Add Key Phrases in the *Key Phrase* text area separating each key phrase with a line break (carriage return).
4. Click *Save* to save the changes to the *Key Phrase* list.

Local Searches

Local Searches is a means of getting information on the searches that occur on the front of the site.

The left navigation is broken down by year and then by month. You can click on any month of interest to view information on the searches performed during that period. Information stored is when the actual search occured, what the criteria was, and the amount of search results shown to the user.

A good use of this information is in Search Engine Optimization. Knowing what people are searching for internally to the site can be used to optimize pages to make them more viable for the user.