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

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.

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Introduction to Users

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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 training document will cover creating, modifying and removing Users from ESM.

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

Create 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 Create New just below the main navigation.
3. Fill in the fields. See the User Fields section of this document for more information.

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 charachters.

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 Messsages

Usernames are used thruout the system to identifiy people and therefore must be unique for the system to work correctly.

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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 or to Content Groups.

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 Group 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 user will not have the area in the 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 user will not have the area in the menu.

Add or Delete a User in a Permission Level

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

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.

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 can perform no actions on the site. Make certain that if you remove a Permission Level to reassign all of the users to different Permission Levels.

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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.

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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.

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 the Common Error Messages area for more information.

Common Error Messages

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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.

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.

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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.

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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.

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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 only contain letters and numbers.
- 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

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.

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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

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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.

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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.

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.

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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.

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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 are subject to security. See the Assets Security section of this document.

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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 instructionshere.

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.

following 3 step chain must be satisfied:

- The asset must be associated with an Asset Group.
- The Asset group must be associated with a Content Group. The association occurs in the *Assets Group* accordion seen while editing a Content Group.
  More information on Content Groups here.
- The user must be associated with that same content group. The association occurs in the *Users* accordion seen while editing a Content Group.
  More information on Content Groups here.

Once this chain of relationships is satisfied, the user should be able to use the asset in the content. More info on this here.

Use this to enforce users only embedding documents which they have rights over.

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. 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. 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.

embeddable objects. One form can be embedded in multiple places on the site.

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.

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.