

## EzUpdate Client User Guide

### Table of Contents

1. Introduction
2. Logging Into EzUpdate
3. EzUpdate Sections
4. EzUpdate Fields
5. Editing Content Within an EzUpdate Section
  - 5.1 Delete Item
  - 5.2 Add Item
  - 5.3 Edit/Modify Item
6. Using a Rich-Text Editor
7. EzUpdate Administrator Approve/Reject Users or Profile Edits
8. Viewing/Exporting Reports
9. EzUpdate User Management
10. Email Management
  - 10.1 Editing Auto-Generated Email
  - 10.2 Editing Manually-Sent Email
11. Editing an Events Calendar

## 1. Introduction

EzUpdate is a content management tool that provides clients the ability to change the content of their site without intervention by Embarc. EzUpdate includes an administrative website (usually at <http://www.yourdomain.com/admin>) that allows content displayed on the public site to be added, modified, or deleted. Reports may also be generated by EzUpdate from information collected on the public site.

The "Sections" included in EzUpdate, as well as the Actions available within each Section to an EzUpdate Administrator, are customized and specific to each client. This guide will give a general overview of how EzUpdate works and how to navigate through an EzUpdate administration website.

**IMPORTANT:** This User Guide contains a comprehensive list of all the features that are possible through the Embarc EzUpdate Tool. Depending on what options your company has selected for implementation on your website, not all the features may be applicable to you and your company's web site.

## 2. Logging Into EzUpdate

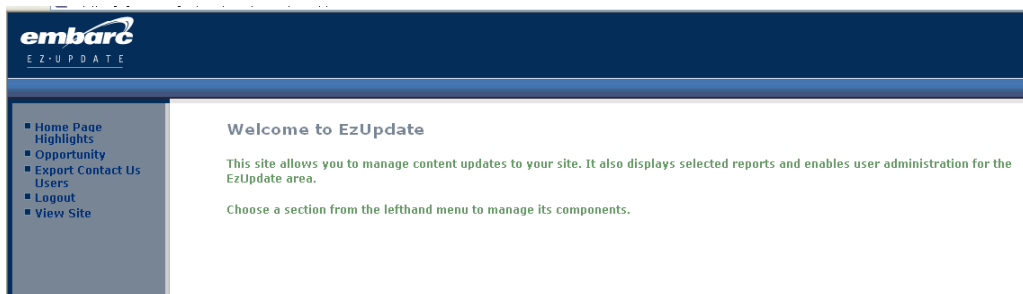
To log into EzUpdate, go to <http://www.yourdomain.com/admin> (unless a different Administration website address has been established).

The following Login page will be displayed:



Embarc will provide a client with up to 10 usernames and passwords to log in. (By request, an additional EzUpdate section can be created to allow clients the ability to manage the administration usernames and passwords themselves.)

Upon Login, an EzUpdate Welcome Page will be displayed, with each of the Sections available listed in a left-side menu:



(Note: The Login page for each client may have a different Welcome message.)

### 3. EzUpdate Sections

An EzUpdate "section" is an area of the public website that is content managed by the EzUpdate Administration application. Examples of Sections include:

- Home Page Highlights
- Company Info
- News/Announcements
- Press Releases
- Events
- Awards
- Job Opportunities
- FAQ
- Calendar
- Reports/Export Reports
- EzUpdate User Management
- Site User Management (for password protected areas of a public site)

Basically, any area of a public site that has content can be managed through EzUpdate. The custom Sections provided to a client are defined in the Deliverables section of the Functional Specification document.

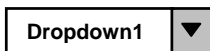
The Sections available for EzUpdate Administration are listed in a left-side menu on the EzUpdate Welcome page.

## 4. EzUpdate Fields

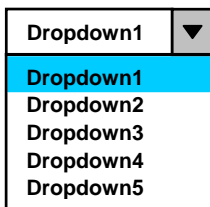
When entering information of any kind into EzUpdate, the Administrator (or approved EzUpdate User) will be presented with a form consisting of “fields”. Each field can accept information in one of several ways. The possible fields that an Administrator could use include:

- Dropdown Menu
- Textbox
- Text Area (Multi-line textbox)
- Rich-Text Editor
- Date Picker
- Checkbox(es)/Multiple Select Field
- Radio Buttons
- File Upload/Image Upload
- Email Recipient

⇒ A **Dropdown Menu** presents a list of options that will appear after clicking on a “down arrow” displayed in the right side of the dropdown box:



The first option within the entire list will appear in the dropdown box before the arrow is clicked. After it is clicked, all options will be displayed in a menu that *drops down* below the original menu box:



⇒ A **Textbox** is an actual box into which a line of text can be typed. When logging into EzUpdate, the User Name and Password are typed into textboxes. By clicking on a textbox, a cursor will appear and then text can be entered. For example, if a “Home Page Highlight Title” was a field on an EzUpdate page, it might look like this:

Home Page Highlight Title:

The number of characters allowed (sometimes limited to 50 or 100 characters) often exceeds what can be seen in the textbox, so text will scroll to the left as it is entered once the textbox is filled. The format, style, size, etc. of the text as it appears on the public site will be defined within the programming of that public webpage and cannot be changed from within EzUpdate. Using the same example as above, the title is entered by typing directly into the box, and that text would then appear in the appropriate place on the public site.

Home Page Highlight Title:

⇒ A **Text Area** (or **Multi-Line Textbox**) is exactly like a textbox except that it can accept more than one line of text. The number of characters entered can be limited here as well, but usually with a much higher maximum (such as 5000 characters). As with a textbox, the font, size, etc. of the text entered into a text area cannot be altered from within EzUpdate. One difference from a textbox is that text will wrap around (usually) to the next line within the text area instead of scrolling to the left. Because of the large amount of text that can fit into a text area, a scroll bar often appears to the right of the text box:


Home Page Highlight Text:



⇒ A **Rich-Text Editor** is another possible field for entering text that would then appear on the public site. This EzUpdate feature will be explained in detail in Section 6 of this guide, but it is essentially a text area that allows an Administrator to define all attributes of the text from within EzUpdate (such as the format, style, size, font, color, etc.). Tables and images can also be inserted, as well as special characters not normally available. See Section 6 for more information about Rich-Text Editors.

⇒ A **Date Picker** is a feature that allows a date to be chosen from a pop-up calendar instead of typing into a textbox. Dates are usually entered with the format MM/DD/YYYY, and if a date to be entered is already known, it can be entered in this way. However, if a certain day is known but not the specific date (or it is known but the Administrator wishes to use this feature anyway), the date can be selected by using the date picker. For example, if a date must be entered into an EzUpdate form, the field may appear as:

Date:  

By clicking on the calendar icon () , and a larger box with the current month will appear:



Clicking the single arrow facing to the right will display the next month while clicking the single left arrow will display the previous month. The double arrows allow the user to move forward or backward a year at a time. When the correct year and month are displayed, click on the appropriate day within the window and that date will be selected and displayed in the textbox as MM/DD/YYYY.

⇒ A **Checkbox** is used for something that can be either “on” or “off”, such as information within an EzUpdate form that can be chosen to be displayed or left off of the public site, or if the information to be displayed is one item out of a predetermined list. A checkbox can be either “checked” or “unchecked”, and clicking on the box will toggle between these two options. For example, if information to display on the public site is being entered about a product that can be either “Small”, “Medium”, or “Large”, checkboxes can be used in EzUpdate instead of a textbox for entering the size:

Item Size:      Small  
                   Medium  
                   Large

Now an Administrator can just check the appropriate box with filling out this form. This is mainly used when the possible options cannot deviate from a given list.

Checkboxes can also be used for activating an entire form of information and not just one field. For example, if the public site has a section for listing job openings, an EzUpdate form can be filled out for each separate opening. When that opening is filled, instead of deleting the entire form, a checkbox could exist within the form that could determine if that information is “active” or “inactive”. Unchecking the box would remove the information from the public site, but the form would still exist within EzUpdate. If that position were to become open again, the information could be listed on the public site simply by checking a box and reactivating that job listing instead of retyping everything into a blank form:

### Job Listing

Position Title:

Department:

Job Description:

Active:

⇒ A **Multiple Select** field is a list of checkboxes where more than one selection is allowed. This works the same as described above with the example of information about an item being entered into EzUpdate that can be either “Small”, “Medium,” or “Large”. But in this case, if the form is for describing what inventory is available instead of one particular item, more than one checkbox can be “activated”.

(From the perspective of an EzUpdate Administrator, the form will look exactly the same whether it’s a list of checkboxes or a multiple select field, but what the form allows will be different. These “rules” are determined at the time the EzUpdate website is created for a client and are set up to safeguard against the errant display of information on a public site.)

⇒ Like checkboxes, the use of **Radio Buttons** is another possible tool for making a selection (or selections) from a given list. These are also sometimes used to navigate through an EzUpdate website. For example, after logging into EzUpdate, the Welcome Page is displayed with each of the EzUpdate Sections listed in a left-side menu. The name of each section is also a link that can be clicked in order to access the forms associated with a given section. Once on an EzUpdate section webpage, items in that section can be “Added”, “Modified/Edited”, or “Deleted” (this is explained in Section 5 of this guide). If this EzUpdate section is for displaying Announcements on the public site, these announcements might be listed with a radio button ahead of each one:

## Announcements Section

- Announcement 1
- Announcement 2
- Announcement 3

Modify	Delete
--------	--------

To select one of the Announcements, click on the radio button in front of its name, and a dot will appear inside it (such as with Announcement 1 above). If one of the other radio buttons is clicked, a dot will appear inside it, but *disappear* from the first radio button. Usually, a list using radio buttons allows only one selection to be made at a time, although this is not always the case.

In this example, if the “Modify” button is clicked, the Administrator would be taken to the EzUpdate page with all of the fields relevant to that Announcement.

Radio buttons can also be used within the forms of EzUpdate and not just used as a way of navigating through the administration website itself. When used to choose an item from a list, radio buttons work the same exact way as checkboxes do.

⇒ A **File/Image Upload** can be done in EzUpdate to make an image available for display on the public site or to make a file (such as an MSWord document or PDF file) available for download. An uploaded image will appear in a predetermined area of the public webpage, so the EzUpdate Administrator simply has to make the file available within EzUpdate. A document to be available for download is usually listed as a link on the public page, with the name of the file (entered into a textbox in EzUpdate) used as that link.

Within EzUpdate, the way to upload a file or an image is to enter its current location within the Administrator’s network or hard drive into a textbox, or to use the “Browse” feature that will display a pop-up “Choose file” search window for navigating through different drives or folders until the file is located:

Sample Photo:	Upload:	<input type="text"/>	<input type="button" value="Browse..."/>
---------------	---------	----------------------	--

To upload the image after it is found by the Administrator, click the “Save” or “Submit” button at the bottom of the page. Once uploaded, the field will change to something like the following:

Sample Photo:	<a href="#">Download</a>	<input type="checkbox"/> Delete
Upload:	<input type="text"/>	<input type="button" value="Browse..."/>

The image will not be visible within the EzUpdate form after being uploaded, but can be viewed by clicking on the "Download" link. Check the "Delete" checkbox and click the "Submit" or "Save" button at the bottom of the form to remove the image.

When uploading a file for public user download, the process is the same as above, but the EzUpdate form may look like this:

File:            Title:

                  Upload File:

(This process could take several minutes depending on file size.)

The "Title" entered into the textbox would appear on the public site in the appropriate area for listing such a file, but the title name would *also* be the link to be clicked on to download the file. After a file is uploaded into EzUpdate, the form will show this by changing the look of this field to something like the following:

File:             Delete    [Name of Uploaded File](#)

                  Title:

                  Upload File:

(This process could take several minutes depending on file size.)

The name of the file is also the link for viewing it from EzUpdate just as it is on the public site. Clicking the link will open the program necessary for viewing it (MSWord, Adobe Acrobat, Excel, etc.).

⇒ Some EzUpdate forms allow an **Email Recipient** to be named in a textbox. This can be a URL or email address that, when clicked on the public site, opens a link to the given website or a "New Message" window for sending an email to the given address. The actual URL or email address can be listed on the public site, or a different name for the link can be used such as "Contact Us", "Apply Now", and so on, depending on how the public site is programmed.

## 5. Editing Content Within an EzUpdate Section

From the EzUpdate Welcome Page, click on one of the “sections” listed along the left side of the page. Most Section pages will then display a table similar to the one shown below.

### Section Title

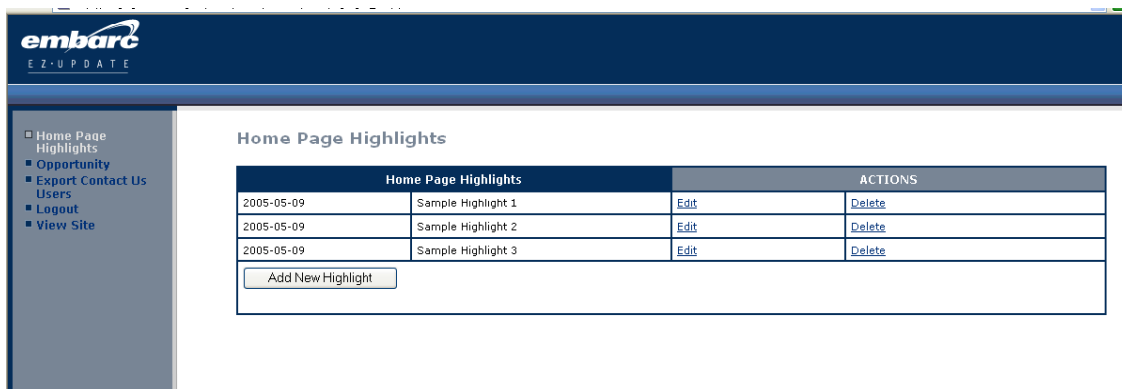
Item Names		ACTIONS	
Date	Item 1	<a href="#">Edit</a> ←[link]	<a href="#">Delete</a>
Date	Item 2	<a href="#">Edit</a>	<a href="#">Delete</a>
Date	Item 3	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="button" value="Add New Item"/> ←[button]			

From this page, an EzUpdate Administrator can Add, Modify, or Delete an Item from the list shown. Any of these Actions will alter the content on the public site in the area defined by that particular Section.

- If the “Delete” link is clicked to the right of a given Item, that Item will be removed from the list shown in EzUpdate **and** the content associated with that Item will be removed from the public site.
- If the “Add New Item” button is clicked, a blank form with various Fields will be displayed.
- If the “Edit” link is clicked to the right of an Item, a pre-filled form with the current content associated with that Item will be displayed.

An example of these Actions is shown below.

From the EzUpdate Welcome Page, click on the “Home Page Highlights” link in the left-side menu. The page below (or one similar to it) will be displayed:



The screenshot shows the EzUpdate interface. At the top left is the Embarc logo with 'EZ-UPDATE' below it. A navigation menu on the left lists: Home Page Highlights, Opportunity, Export Contact Us Users, Logout, and View Site. The main content area is titled 'Home Page Highlights' and contains a table with the following data:

Home Page Highlights		ACTIONS	
2005-05-09	Sample Highlight 1	<a href="#">Edit</a>	<a href="#">Delete</a>
2005-05-09	Sample Highlight 2	<a href="#">Edit</a>	<a href="#">Delete</a>
2005-05-09	Sample Highlight 3	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="button" value="Add New Highlight"/>			

These three Home Page Highlights will be displayed on the public site as well:

**Sample Highlight 1 – 2005-05-09**

Text for Sample Highlight 1.

**Sample Highlight 2 – 2005-05-09**

Text for Sample Highlight 2.

**Sample Highlight 3 – 2005-05-09**

Text for Sample Highlight 3.

5.1 Delete Item

Click the “Delete” link for one of these Home Page Highlights (Sample Highlight 2 in this example), and the Item will be removed from the EzUpdate list **and** its content will be removed from the public site:

(Note: EzUpdate will often show a pop-up window that asks you to confirm that you do in fact want to delete the item. Click “OK” to continue.)



The public site now shows the Item deleted:

**Sample Highlight 1 – 2005-05-09**

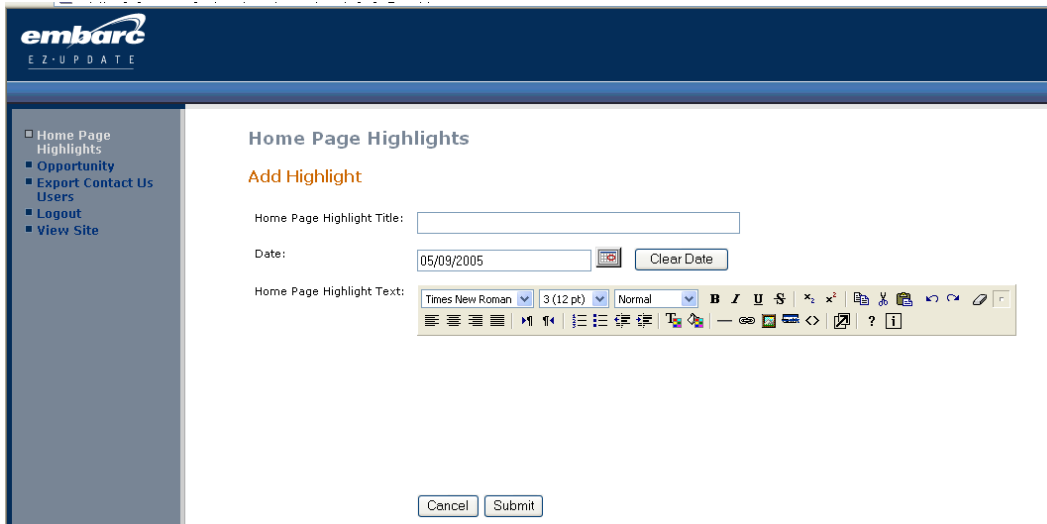
Text for Sample Highlight 1.

**Sample Highlight 3 – 2005-05-09**

Text for Sample Highlight 3.

## 5.2 Add Item

To add a new Home Page Highlight, click the “Add New Highlight” button on the EzUpdate page. A form with various Fields will be displayed next. These Fields are textboxes, dropdown lists, checkboxes, rich-text editors, date pickers, etc. that define things such as the Title, Date, or Body of the content to be displayed on the public site. In this example, clicking the “Add New Highlight” button will display a form such as the one shown below:



The screenshot shows the 'Home Page Highlights' section of the EzUpdate interface. It features a sidebar with navigation options and a main form area. The form includes a title field, a date field (set to 05/09/2005), and a rich-text editor for the highlight text. The rich-text editor has a toolbar with various formatting options like bold, italic, underline, and font size. At the bottom of the form are 'Cancel' and 'Submit' buttons.

This particular form contains:

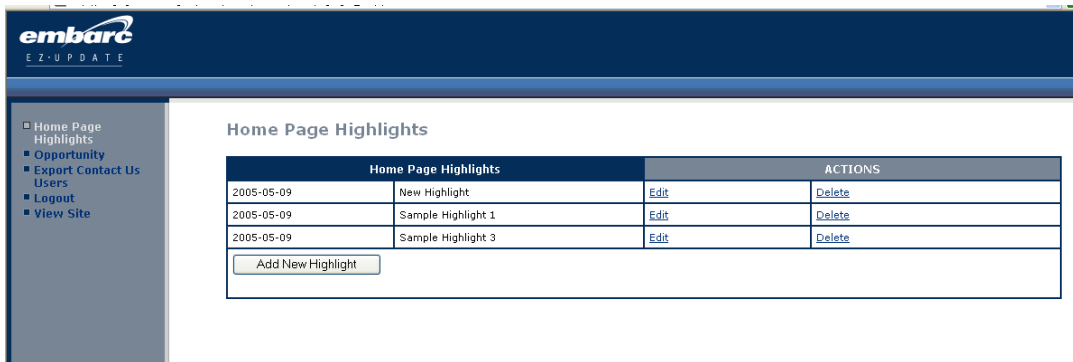
- A text box for entering the “Home Page Highlight Title”
- A text box or date picker for selecting the date
- A rich-text editor for entering the “Home Page Highlight Text”

If the next “Home Page Highlight” to be entered is called “New Highlight”, is entered on May 9, 2005, and its associated text is “Sample content for New Highlight”, these can be entered into the above form.

- 1) In the text box next to “Home Page Highlight Title:”, type “New Highlight”
- 2) To enter the appropriate date, it can be entered manually by typing “05/09/2005” into the textbox next to “Date:”, or the date picker can be used.
- 3) To enter the text associated with this Highlight, enter it into the rich-text editor, which is a lot like a regular text box (or text area), but has additional features for adjusting the font, color, style, or size of the text, as well as the ability to insert files, pictures, or HTML links. (Rich-text editors and their features will be explained in detail in the next section of this guide) In the text area below the tool bars of the rich-text editor, type “Sample content for New Highlight.”

Click the “submit” button, and this new Home Page Highlight will now appear in the EzUpdate list of Home Page Highlights and on the public site:

EzUpdate:



Home Page Highlight area of Public Site:

**New Highlight – 2005-05-09**

Sample content for New Highlight.

**Sample Highlight 1 – 2005-05-09**

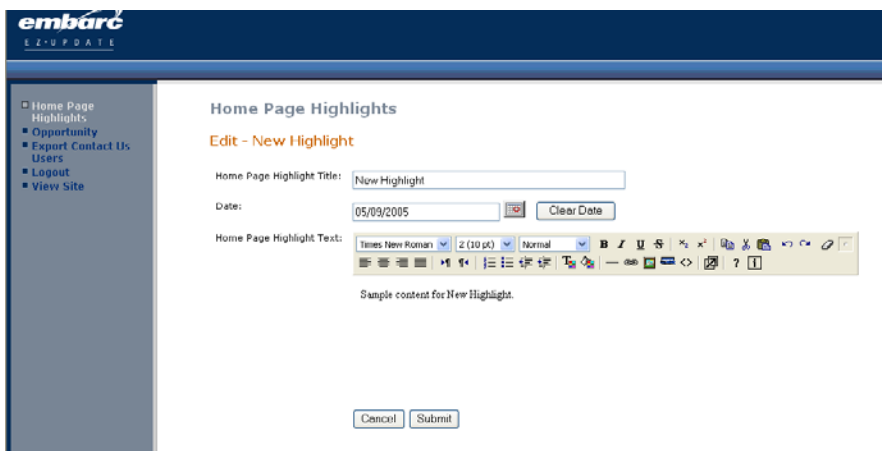
Text for Sample Highlight 1.

**Sample Highlight 3 – 2005-05-09**

Text for Sample Highlight 3.

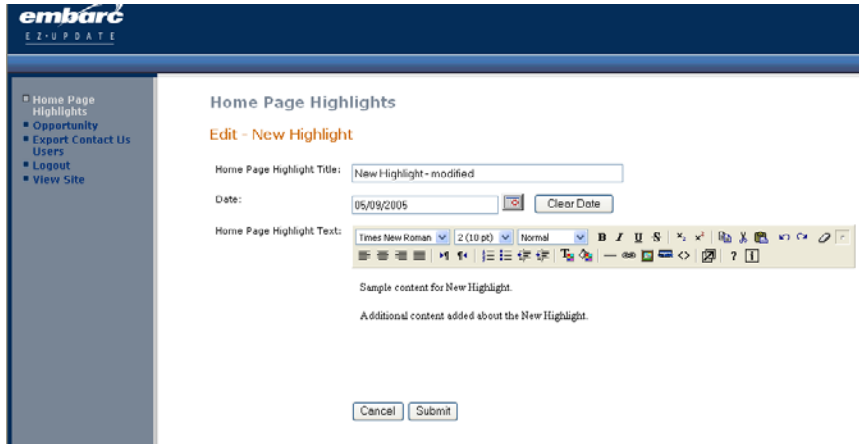
5.3 Edit/Modify Item

To edit or modify a Home Page Highlight, click the “Edit” link to the right of the Highlight to be changed (the “New Highlight” in this case). Clicking “edit” will cause the same form to be displayed as when adding a new item, but with the Fields pre-filled with the information that was entered at an earlier time:



These fields can be changed to any “new” information, which will then display on the public site:

EzUpdate changes:



The screenshot shows the 'Home Page Highlights' management interface. It includes a sidebar with navigation links: Home Page Highlights, Opportunity, Export Contact Us Users, Logout, and View Site. The main form area is titled 'Home Page Highlights' and contains an 'Edit - New Highlight' section. The form fields are: 'Home Page Highlight Title' with the value 'New Highlight - modified', 'Date' with the value '05/09/2005' and a 'Clear Date' button, and 'Home Page Highlight Text' with a rich text editor. The text editor shows 'Sample content for New Highlight.' and 'Additional content added about the New Highlight.' Below the text area are 'Cancel' and 'Submit' buttons.

Home Page Highlight area of Public Site reflects the changes:

**New Highlight – modified – 2005-05-09**

Sample content for New Highlight.

Additional content added about the New Highlight.

**Sample Highlight 1 – 2005-05-09**

Text for Sample Highlight 1.

**Sample Highlight 3 – 2005-05-09**

Text for Sample Highlight 3.

## 6. Rich-Text Editor

Content that is entered into an EzUpdate form and displayed on the public site can be typed into one of the following:

- A textbox (for one line of text)
- A text area (for multiple lines of text)
- or a Rich-Text Editor

The font, size, color, or style of content displayed on a website is usually defined within the code from which the site is programmed (the website's *style sheet*). This means that these attributes don't need to be determined when typing into a textbox or text area.

However, a rich-text editor allows the EzUpdate user to choose these qualities of the content at the time the content is entered. (Note: For this reason, text cannot be cut and pasted into a rich-text editor from another source where font, size, etc. is defined elsewhere, such as text already in HTML or from a word processor such as Microsoft Word. To cut and paste text into a rich-text editor, first cut and paste it into a Notepad document, and then cut and paste it from Notepad into the rich-text editor. Otherwise, all content entered must be typed in manually.)

A Rich-Text Editor is a text area typically with two tool bars above it:








|

The two tool bars can contain dropdown lists or buttons for editing or executing the following (Note: This is one possible Rich-Text Editor toolbar configuration, other buttons are available and the order in which they appear can be customized):



- ⇒ For all buttons, while clicking on a button will implement a change (style change, justify text, insert bullets, etc.), clicking on that button again will undo that change. For example, to make text **bold**, highlight it and click the "Bold" (**B**) button (or click the button first and then type). To unbold text, highlight the text to be changed and click the "Bold" button – any previously **bold** text will no longer be formatted that way.


### Top Tool Bar






- **Font / Size / Format** ( Times New Roman 3 (12 pt) Normal )
  - **Font** – A dropdown that selects the Font of the text. The options in a Rich-Text Editor can be limited compared to word processing programs, but will typically include: Arial, Courier New, Georgia, Tahoma, Times New Roman, Verdana, impact, or WingDings
  - **Size** – A dropdown that provides seven text sizes from which to choose: 1 (8 pt), 2 (10 pt), 3 (12 pt), 4 (14 pt), 5 (18 pt), 6 (24 pt), 7 (36 pt)
  - **Format** – A dropdown that provides a method for defining the style of the text: Heading 1, Heading 2, Heading 3, Heading 4, Heading 5, Heading 6, Heading 7, Normal, Address, Formatted

- **Bold / Italic / Underline / Strikethrough** ()
  - **Bold** – Formats text to be bold
  - **Italic** – *Formats text to be in italics*
  - **Underline** – Formats text to be underlined
  - **Strikethrough** – ~~Formats text to have a strikethrough, or appear crossed-out~~
- **Subscript / Superscript** ()
  - **Subscript** – Formats text to appear as a subscript
  - **Superscript** – Formats text to appear as a superscript
- **Copy selection / Cut selection / Paste from clipboard** ()
  - **Copy selection** – Places any highlighted text on the clipboard without deleting the original text
  - **Cut selection** – Deletes any text that is highlighted and places it onto the clipboard
  - **Paste from clipboard** – Inserts any text that was copied or cut
- **Undo your last selection / Redo your last selection** ()
  - **Undo your last selection** – Removes your last action
  - **Redo your last selection** – Repeats your last action
- **Remove formatting / Clear MSOffice tags** ()
  - **Remove formatting** – Clears highlighted text of any previous formatting, such as format, bold, underline, etc.
  - **Clear MSOffice tags** – Removes tags from any highlighted text that was copied into the Rich-Text Editor from MSWord (or other Microsoft product)

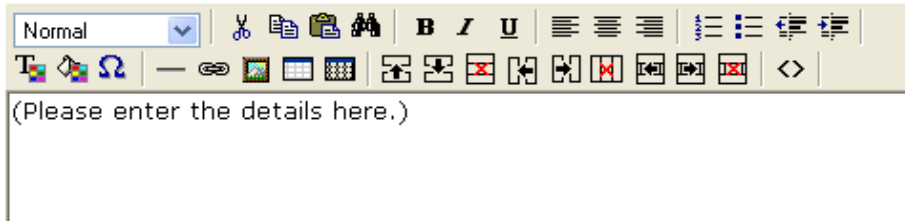
#### Bottom Tool Bar

- **Justify Left / Justify Center / Justify Right / Justify Full** ()
  - **Justify Left** – Align text along the left margin
  - **Justify Center** – Align text to be centered and an equal distance from the left and right margins
  - **Justify Right** – Align text along the right margin
  - **Justify Full** – Adjust spacing so that text is aligned evenly along both the left and right margins
- **Direction left to right / Direction right to left** ()
  - **Direction left to right** – Text will be entered from left to right as it is typed
  - **Direction right to left** – Text will be entered from right to left as it is typed

- **Ordered List / Bulleted List** ()
  - **Ordered List** – Inserts numbering ahead of each line (or lines) or text; advance to the next number with each carriage return (when you press “enter”)
  - **Bulleted List** – Inserts bullets ahead of each line (or lines) of text that is separated by a carriage return




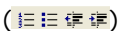
(Note: Numbers or bullets can be inserted after entering text by highlighting the text to be numbered or bulleted and then clicking on the appropriate button.)
- **Decrease Indent / Increase Indent** ()
  - **Decrease Indent** – Moves indented text (which has been highlighted) to the left
  - **Increase Indent** – Moves highlighted text to the right (similar to inserting tabs in a word processing program)
- **Font Color / Background Color** ()
  - **Font Color** – Opens a window with up to 210 colors from which to choose for text
  - **Background Color** – Opens a window with up to 210 colors from which to choose for the background of the text area
- **Horizontal Rule / Insert Web Link** ()
  - **Horizontal Rule** – Inserts a horizontal line across the entire width of the text area
  - **Insert Web Link** – Opens a window for inserting a hyperlink
- **Insert/Modify Image / Insert Table / Toggle HTML Source** ()
  - **Insert/Modify Image** – Opens a window for choosing an image URL, alternate text for the image, as well as its alignment, border thickness, and any horizontal or vertical spacing around the image
  - **Insert Table** – Opens a window for defining a table to be inserted into the text area. The number of rows and columns to be in the table are defined here, as well as the table width and alignment within the text (the width is defined as a percentage of the text area)
  - **Toggle HTML Source** – Displays how everything entered into the Rich-Text Editor (text, tables, images, etc.) is converted into HTML
- **Enlarge Editor / Help using editor / About this editor** ()
  - **Enlarge Editor** – Opens a full-screen Rich-Text Editor in a separate window
  - **Help using editor** – Opens a new browser with the HTMLArea (Rich-Text Editor) Documentation
  - **About this editor** – Opens a window with information about the HTMLArea program and links to related resources

Other buttons available are shown in the next Rich-Text Editor example, which also shows a different button configuration in the tool bars:





(Only buttons not previously defined will be explained here)



### Top Tool Bar




- **Cut / Copy / Paste / Find** ()
  - **Find** – Opens a search window for entering a word (or words) to be found within the text contained by the Rich-Text Editor
- **Bold / Italic / Underline** ()
- **Justify Left / Justify Center / Justify Right** ()
- **Ordered List / Bulleted List / Decrease Indent / Increase Indent** ()

### Bottom Tool Bar

- **Font Color / Background Color / Special Characters** ()
  - **Special Characters** – Opens a window with extra characters not available on a keyboard, such as letters with accents or extra symbols, fractions, etc.
- **Horizontal Rule / Insert Web Link / Insert Image / Insert Table / Show 0 Borders** ()
  - **Show 0 Borders** – When a table is created with a border thickness of zero, this button will display an outline of the cells that would otherwise be invisible

⇒ The next nine buttons refer to actions that may be taken only after creating a table and working from within that table. If a table is created, but the cursor is placed outside of the table, the actions performed by these buttons will be unavailable.

- **Insert Row Before / Insert Row After / Delete Row** ()
  - **Insert Row Before** – Adds a row of cells above the current row (the “current” row is the one your cursor is in at the time)
  - **Insert Row After** – Adds a row of cells below the current row
  - **Delete Row** – Removes the current row of cells
- **Insert Column Before / Insert Column After / Delete Column** ()
  - **Insert Column Before** – Adds a column of cells to the left of the current column

- **Insert Column After** – Adds a column of cells to the right of the current column
- **Delete Column** – Removes the current column of cells
- **Insert Cell Before / Insert Cell After / Delete Cell** (  )
  - **Insert Cell Before** – Adds a cell to the left of the current cell
  - **Insert Cell After** – Adds a cell to the right of the current cell
  - **Delete Cell** – Removes the current cell
- **View HTML Source** (<>)

## 7. EzUpdate Administrator Approve/Reject Users or Profile Edits

Besides adding or changing content on the public site, an EzUpdate Administrator may be in charge of approving requests for access to password protected areas of a website. To apply for access, a site visitor (or employee) may fill out a form with fields such as Name, Address, and other biographical information. Site users may also have a profile he or she may edit after logging into the public site. An EzUpdate section titled "Pending Approval" (or something similar) may be added to the administration website to handle this task. After navigating to this section within EzUpdate, a page with these pending user profiles will be displayed:

### Pending Profiles

Name	ACTIONS			
Applicant1	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Approve</a>	<a href="#">Reject</a>
Applicant2	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Approve</a>	<a href="#">Reject</a>
Applicant3	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Approve</a>	<a href="#">Reject</a>
Applicant4	<a href="#">View</a>	<a href="#">Edit</a>	<a href="#">Approve</a>	<a href="#">Reject</a>

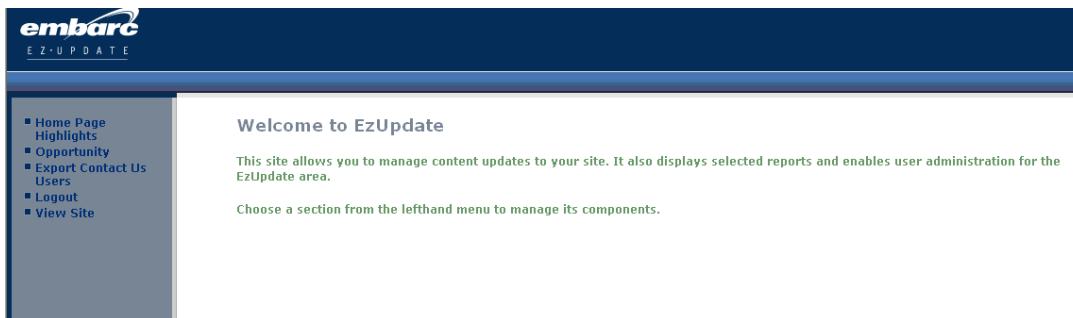
- Clicking "View" will allow the Administrator to see the pending profile as it appears in a webpage
- Clicking "Edit" will open the same form used by the applicant and allow the Administrator to changes to information in any of the fields. This may be necessary if an applicant left out information that is entered later, if a user name is requested that is already in use, to make corrections, etc.
- Clicking the "Approve" link will grant access to the applicant and/or approve changes to a person's profile if editing is allowed from the public site.
- Clicking the "Reject" link will deny access to the applicant and/or reject changes made to a person's profile.

Any of these actions often generates an email that is sent to the applicant alerting him or her that changes have been made to the profile, or profile changes/request for site access has been approved or denied.

## 8. Viewing/Exporting Reports

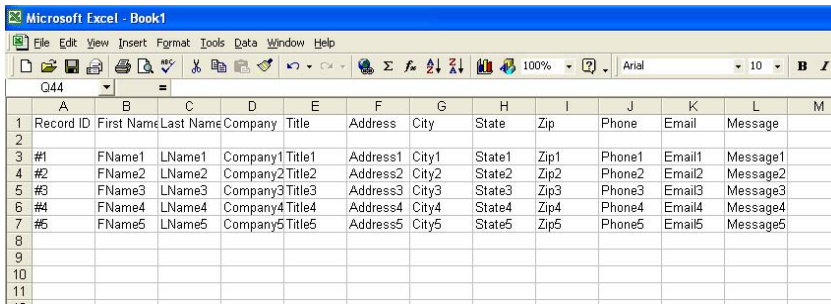
Information that is collected by a form on a public site will be stored in a database. To view this information, EzUpdate allows an Administrator to “export” the information into a window that allows it to be viewed (usually in an Excel spreadsheet).

For example, if the public site has a form that visitors can use to contact the client company and provide personal information (address, phone number, email, etc.), an Administrator can view the data collected by logging into EzUpdate and clicking on the “Export” link on the left-side of the page:



(In this example, the link is labeled “Export Contact Us Users”, but this label will vary by client.)

Selecting this link generates a new window with an Excel spreadsheet (there is usually a pop-up window that asks if you want to “Save” or “Open” this file, clicking “Open” displays the following screen):

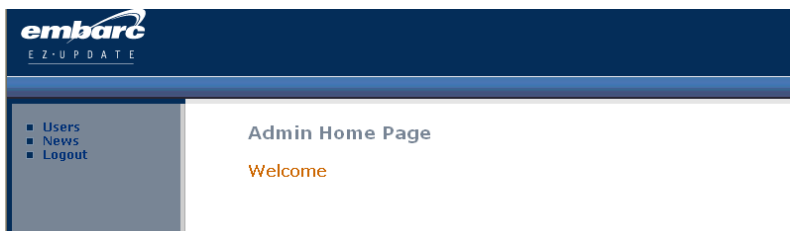


	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Record ID	First Name	Last Name	Company	Title	Address	City	State	Zip	Phone	Email	Message	
2													
3	#1	FName1	LName1	Company1	Title1	Address1	City1	State1	Zip1	Phone1	Email1	Message1	
4	#2	FName2	LName2	Company2	Title2	Address2	City2	State2	Zip2	Phone2	Email2	Message2	
5	#3	FName3	LName3	Company3	Title3	Address3	City3	State3	Zip3	Phone3	Email3	Message3	
6	#4	FName4	LName4	Company4	Title4	Address4	City4	State4	Zip4	Phone4	Email4	Message4	
7	#5	FName5	LName5	Company5	Title5	Address5	City5	State5	Zip5	Phone5	Email5	Message5	
8													
9													
10													
11													
12													
13													

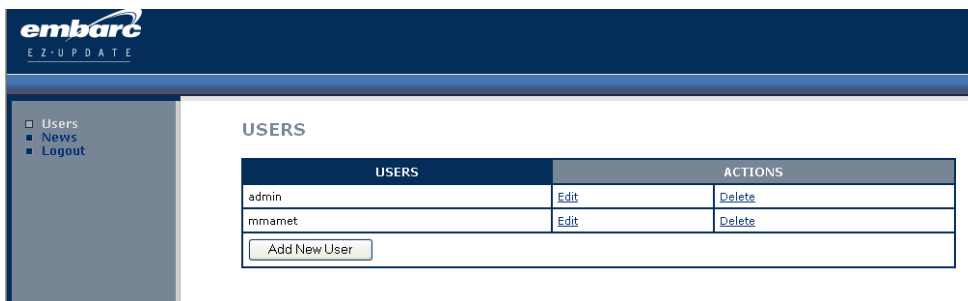
## 9. EzUpdate User Management

If requested, an extra Section can be added to EzUpdate that allows the Administrator to add EzUpdate Users. This may be necessary if multiple departments within a company have information displayed on the public site and the Administrator wishes to grant EzUpdate access to the employee in charge of each department. Each additional user can then change the content relevant to his or her department in a timely manner instead of one person overseeing all content changes on the entire public site. (EzUpdate User access can be limited to certain sections of EzUpdate.)

Adding, editing, or deleting additional EzUpdate Users works the same way as adding Items within any other EzUpdate Section. If this Section is available to an Administrator, it will be listed in the left-side menu:

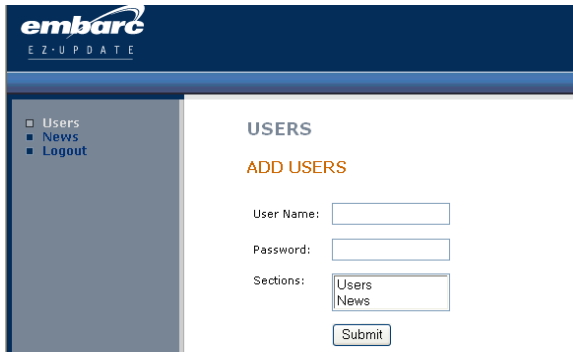


From the left-side menu, click on the “Users” link (which may also be called “Manage EzUpdate Users”):



This page is similar to the page displayed for adding, deleting, or editing Home Page Highlights as explained in Section 4. The Actions are basically the same as well. Clicking the “Delete” link will remove that User from the list **and** prevent that person from having EzUpdate access. Clicking the “Add New User” button will bring the Administrator to a form that can have few or many fields, depending on how much information is needed about each EzUpdate User.

In this example, the form for adding a new user is very short:



The Administrator enters a User Name, selects a Password, and then also chooses what EzUpdate Section the new user will be able to access.

If editing User information, the same form as above will display, but with the current information pre-filled into all fields.

## 10. Email Management

Another EzUpdate Section available to clients is for the management of emails sent in one of two ways:

- 1) those generated automatically by the actions of a site visitor or EzUpdate administrator
- 2) emails sent manually from within EzUpdate to site users

When a visitor to the public site requests access to a password-protected area of the site, submits or alters personal information in a user profile, or requests that additional information be sent to him or her, an email is usually sent to an Administrator to alert that person to the pending request or edit. An email may also be sent to the site visitor to acknowledge receipt of the request. Such an email may look something like the following:

<First Name, Last Name> has contacted <Your Company Name>. Please click the following link to login to the EzAdmin tool to export the latest results:  
<<http://www.yourdomain.com/admin>>

If a site visitor enters personal information into a user profile that requires Administrator approval (such as to validate the profile or to approve the content if profile information is displayed on the public site), emails such as the following may be sent to the user and the Administrator:

Email to site visitor:

Dear <First Name, Last Name>,  
Thank you for submitting your profile information on <[www.yourdomain.com](http://www.yourdomain.com)>.  
You will be notified when your profile is active.

Email to Administrator:

Dear <Name of Administrator>,  
A profile has been submitted to <[www.yourdomain.com](http://www.yourdomain.com)> and is awaiting approval.

After an Administrator approves or rejects the profile (see Section 7 of this guide), an email may be generated by this action to alert the user of the profile status:

If rejected:

Dear <First Name, Last Name>,  
At this time we require more information in order to accept your user profile. Please contact <First Name, Last Name> at <[email@yourdomain.com](mailto:email@yourdomain.com)>. Thank you.

If approved:

Dear <First Name, Last Name>  
Your profile is now active on <[www.yourdomain.com](http://www.yourdomain.com)>. If you have any questions please contact <First Name, Last Name> at <[email@yourdomain.com](mailto:email@yourdomain.com)>.

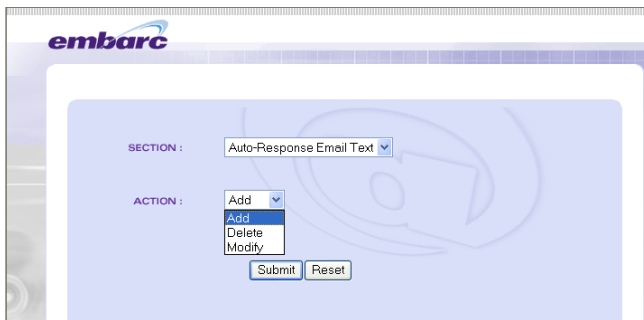
An auto-generated email can also be sent after content has been changed or added to a public site. Site users who have signed up to receive such notifications (or employees that need to be notified) may receive an email such as the following:

Dear <First Name, Last Name>,  
Edited or new content has been posted to <[www.yourdomain.com/changedsection](http://www.yourdomain.com/changedsection)>. Please check it out at:  
<INSERT LINKS TO CONTENT THAT HAS BEEN UPDATED BASED ON ALERT PREFERENCES>

The content of these types of auto-generated emails can be built into the functionality of the website and not be accessible for editing through EzUpdate unless a client wanted this feature to be available. When the administration website is created, for any auto-generated emails, a Section can be built into EzUpdate to handle the editing of any email content.

### 10.1 Editing Auto-Generated Email

To edit the text of an email that is auto-generated, login to EzUpdate and click on the appropriate Section listed in the left-side menu. Navigation through EzUpdate may also be done through dropdown lists that present the Sections as one dropdown menu and the Actions to be taken in each Section as a second dropdown list, such as shown below:



This can then lead to a page listing every auto-generated email whose content can be edited. Upon selecting the email message to modify, the form used for changing the text of an auto-generated email could then look something like the following:

#### Modify Auto-Response Email Text

Subject Text:

Email Text:

File Attachment:

(The file attachment field is optional in EzUpdate but a possible feature available upon request.)

## 10.2 Editing Manually-Sent Email

Some email is sent only when an Administrator sends it manually and not as an automatic response. This can happen when an Administrator wants to notify registered users of an upcoming event, a new newsletter available on the public site, or to invite users to upgrade their registered status. EzUpdate can be customized in whatever format works best for a client, but typically there are two ways to manually send an email.

The first method involves using an opt-in email list, or list of emails entered by the Administrator at the time the message is sent. For example, if a client releases an occasional newsletter and wants to let people know when one is made available on the public site, the email management may take place within the Newsletter Section of EzUpdate. After logging into EzUpdate, from the Welcome Page, clicking on the "Newsletter" link in the left-side menu may display a page similar to the following:

### Newsletters

NEWSLETTERS	ACTIONS		
Newsletter1	<a href="#">Edit</a>	<a href="#">Send</a>	<a href="#">Delete</a>
Newsletter2	<a href="#">Edit</a>	<a href="#">Send</a>	<a href="#">Delete</a>
Newsletter2	<a href="#">Edit</a>	<a href="#">Send</a>	<a href="#">Delete</a>
<input type="button" value="Add New Newsletter"/>			

Clicking on the "Send" link for "Newsletter 1" would lead to a page with a form such as the following:

### Newsletters

#### Send Newsletter: Newsletter1

Send the Newsletter1 newsletter announcement to:

- All users who have opted-in to receive it
- To the following email address only

By clicking on either of the two radio buttons, the text area can be pre-populated with a list of email addresses from an opt-in list, or email addresses can be entered directly into the text area. Clicking the "Send" button will generate an email to each listed address announcing the availability of the new newsletter on the public site.

This feature can apply to anything an Administrator wants to announce in an email.

A second method for manually sending email from within EzUpdate involves selecting email recipients from a list of people for whom you have a profile (customers, employees, vendors, etc.). In this example, if you have profiles for a list of attendees to some upcoming event, the EzUpdate Section could be titled "Attendees", and when selected from the left-side of the EzUpdate Welcome Page, a page such as the following may be displayed:

### Attendee Administration

Total Number of Attendees: 5      Confirmed: 3      Unconfirmed: 2

**Send Email**

**Add New Attendee**

Select Email Recipients: [All](#) [Unconfirmed](#) [Confirmed](#) [Deselect All](#)

	<a href="#">ATTENDEE</a>	<a href="#">STATUS</a>	ACTIONS	
<input type="checkbox"/>	Attendee1	Unconfirmed	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Attendee2	Confirmed	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Attendee3	Confirmed	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Attendee4	Unconfirmed	<a href="#">Edit</a>	<a href="#">Delete</a>
<input type="checkbox"/>	Attendee5	Confirmed	<a href="#">Edit</a>	<a href="#">Delete</a>

One similarity this example has to the previous one is that the email was sent from an EzUpdate Section that was designed for the overall management of something besides email (newsletters and attendee profiles in these examples).

Note: EzUpdate can be customized in any way that a client would need, so these examples were meant to explain the overall functionality of manually-sent emails and not as an indication of any limits to what can be done in EzUpdate.

## 11. Editing an Events Calendar


If a public site uses a calendar to display various events, announce when classes will be held, etc., there can be a Section added in EzUpdate called "Calendar" (or any name a client chooses). There are multiple options for how to use or set up a calendar within EzUpdate.


One option is to have a calendar displayed on the EzUpdate Calendar page, from which events can be added or edited directly on the calendar or on a separate page with a form for each event.

The form for entering or editing event details may look like this (but can be customized with any fields):

### Event Details

Event Title:

Start Date:  

End Date:  

Start Time:  End Time:   
#: ## AM/PM

Event Description:

Location:

Once this information is entered as an Event, it can be displayed within an EzUpdate Calendar by month, week, or day. A list showing all events can be displayed as well. From any of these features, the name of the Event would a link that, when clicked, would display the details of the event in a separate window in the same format that would be shown on the public site:

**Events Details**

**Event 1**

**Date:** Monday, May 16, 2005  
**Time:** 2:00 PM – 6:00 PM  
**Location:** Location1

Text for Description.


Within each type of EzUpdate Calendar, "Edit" and "Del" (Delete) links would be given for each Event. Clicking the "Edit" link would return the Administrator to the "Event Details" form, and clicking the "Del" link would remove the Event (usually with a pop-up that asks you to confirm that you want to delete the Event). The "Add" link would bring the Administrator to a blank "Event Details" form.

The look of the monthly, weekly, and daily calendar as they would appear in EzUpdate is shown below, as well as the list of all Events entered, which would appear when the "List" icon is clicked (☰). The menu at the top of each calendar would allow an Administrator to switch between each of the three types of calendars or see the List of Events.

Monthly Calendar:

<a href="#">Day</a>		<a href="#">Week</a>		Month			
◀◀ May 2005 ▶▶							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
<a href="#">[Add]</a> 1	<a href="#">[Add]</a> 2	<a href="#">[Add]</a> 3	<a href="#">[Add]</a> 4	<a href="#">[Add]</a> 5	<a href="#">[Add]</a> 6	<a href="#">[Add]</a> 7	
<a href="#">[Add]</a> 8	<a href="#">[Add]</a> 9	<a href="#">[Add]</a> 10	<a href="#">[Add]</a> 11	<a href="#">[Add]</a> 12	<a href="#">[Add]</a> 13	<a href="#">[Add]</a> 14	
<a href="#">[Add]</a> 15	<a href="#">[Add]</a> 16 <a href="#">Event1</a> <a href="#">[Edit]</a> <a href="#">[Del]</a>	<a href="#">[Add]</a> 17 <a href="#">Event2</a> <a href="#">[Edit]</a> <a href="#">[Del]</a>	<a href="#">[Add]</a> 18	<a href="#">[Add]</a> 19	<a href="#">[Add]</a> 20	<a href="#">[Add]</a> 21	
<a href="#">[Add]</a> 22	<a href="#">[Add]</a> 23	<a href="#">[Add]</a> 24	<a href="#">[Add]</a> 25	<a href="#">[Add]</a> 26	<a href="#">[Add]</a> 27	<a href="#">[Add]</a> 28	
<a href="#">[Add]</a> 29	<a href="#">[Add]</a> 30	<a href="#">[Add]</a> 31					

Weekly Calendar:

<a href="#">Day</a>		Week		<a href="#">Month</a>			
◀ Week of May 15, 2005 ▶							
Sunday May 15, 2005 <a href="#">[Add]</a>							
Monday May 16, 2005 <a href="#">[Add]</a>				<a href="#">Event1</a> <a href="#">[Edit]</a> <a href="#">[Del]</a>			
Tuesday May 17, 2005 <a href="#">[Add]</a>				<a href="#">Event2</a> <a href="#">[Edit]</a> <a href="#">[Del]</a>			
Wednesday May 18, 2005 <a href="#">[Add]</a>							
Thursday May 19, 2005 <a href="#">[Add]</a>							
Friday May 20, 2005 <a href="#">[Add]</a>							
Saturday May 21, 2005 <a href="#">[Add]</a>							

Daily Calendar:

	Day	<a href="#">Week</a>	<a href="#">Month</a>	
<< < May 16, 2005 >> >>				<a href="#">[Add]</a>
8:00 AM				
9:00 AM				
10:00 AM				
11:00 AM				
12:00 PM				
1:00 PM				
2:00 PM		<a href="#">Event1</a>	<a href="#">[Edit]</a>	<a href="#">[Del]</a>
3:00 PM				
4:00 PM				
5:00 PM				
6:00 PM				
7:00 PM				
8:00 PM				
9:00 PM				
10:00 PM				
11:00 PM				

List of Events:

	<a href="#">Day</a>	<a href="#">Week</a>	<a href="#">Month</a>	
< 2005 >				
May 16, 2005				<a href="#">[Add]</a>
Event:	<a href="#">Event1</a>	<a href="#">[Edit]</a>	<a href="#">[Del]</a>	
May 17, 2005				<a href="#">[Add]</a>
Event:	<a href="#">Event2</a>	<a href="#">[Edit]</a>	<a href="#">[Del]</a>	

A calendar used to display events on the public site can also be managed from within EzUpdate with forms that do not actually display the calendar itself in EzUpdate. For example, a calendar used to notify employees of upcoming events on the public site may look like the following:

Employee Events Calendar					<< < May 2005 >> >>
	Monday	Tuesday	Wednesday	Thursday	Friday
	Time: <b>Event1</b> Time: <b>Event2</b>		Time: <b>Event3</b>		
				Time: <b>Event4</b>	

An EzUpdate Administrator could have the ability to Search, Add, Modify, or Delete Events from the calendar. Depending on the number of Events an Administrator would be handling, the "Calendar" Section within EzUpdate could link to a page listing all events (like the "List of Events" shown on the previous page), or it could first link to a Search form, such as the following:

### Search

Leave either or both dates blank for an open-ended search.

Start Date:  

End Date:  

Click on the "Search Events" button and a list of events would appear in a table such as the one below:

Event Title	Date	Event Description	Actions
Event1	MM/DD/YYYY	Description1	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Active</a>
Event2	MM/DD/YYYY	Description2	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Active</a>
Event3	MM/DD/YYYY	Description3	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Active</a>
Event4	MM/DD/YYYY	Description4	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Active</a>

From the "Search" form, clicking the "Add" button (or the "Add New Item" button from the List of Events) would display the form below (or one similar):


### Add/Edit Calendar Item

Event Title:

Event Description:

Meeting Type:  Company – Red  
 Department – Blue  
 Other – Green

Location:

Date:  

Required Attendees:

File Upload:

An "Action" listed in the List of Events is "Active" (which could toggle to "Inactive" when clicked). This Action would allow Events to be entered into EzUpdate but not shown in the calendar on the public site, or for an Event to be removed from the calendar without deleting all of the details about the event in case they are needed for a similar event in the future.

Within the "Add/Edit Calendar Item" form, one field shown is for "Meeting Type" with several options available. This feature could be added to EzUpdate if it was useful to color-code events on the public calendar to make it easier for people to discern what type of event it is before looking at the Event Details.

The "Add/Edit Calendar Item" form also has a "Cancel" button, which allows an Administrator to cancel all edits to an Event and not save any changes.