



PRESENCE

Presence User Guide

SchoolMessenger

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Introduction

This user guide has been designed to help everyday users navigate through Presence's system. The following chapters are divided into individual modules and contain important information in the form of *Reminders*, *Tips*, *Notes* and *Pitfalls*. Pay attention to these alerts as they can prevent you from making common mistakes.

Depending on the package your district/school purchased from Presence, some of these modules may not apply to you. Nonetheless, individual chapters in this guide can be taken as standalone units and will not affect the overall performance of the tools and your ability to learn about them.

Who Should Use this Guide

The contents of this guide are written to be readable by users of all technical backgrounds. Primarily, this guide will be used by teachers and content authors who are responsible for managing or creating some or all pages of the organization's site.

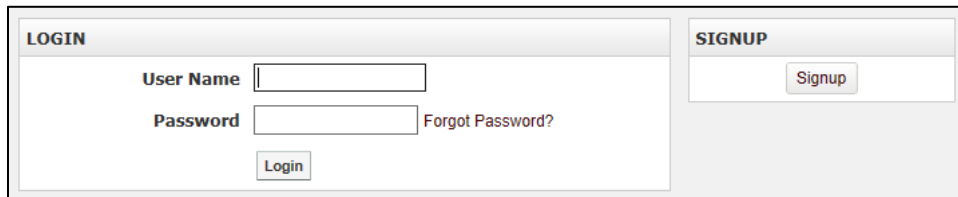
If you have been given a training site, it is a good idea to practice the steps covered in this guide before working on your real sites. This eliminates the risk of you accidentally deleting or ruining anything on your real site.

About Presence

Presence is SchoolMessenger's Content Management System (CMS). This system offers a typical, non-technical web user all the tools needed to create, edit and maintain content on websites. We will go into greater detail on these tools later in the manual.

Accessing your Website

In order to use Presence, you must first log into your website. The login page to your school or district site will contain fields for username and password. The location of the login button will vary according to your website's design; however, login buttons are typically available on the upper right corner of your website.



The image shows a screenshot of a web form with two main sections: LOGIN and SIGNUP. The LOGIN section on the left contains a 'User Name' input field, a 'Password' input field, a 'Forgot Password?' link, and a 'Login' button. The SIGNUP section on the right contains a 'Signup' button.

Vital Information

After logging into your website you will be taken back to the homepage. Before continuing there are a few things to keep in mind:



The Administrative Toolbar

After logging into the website, you will notice an *Administrative Toolbar* floating on the top of your page. This bar contains the tools you will need to maintain your website; it is specific to your user permissions and the page you are viewing. i.e. if you only have limited rights to edit a page, the toolbar will display fewer options.

Permissions

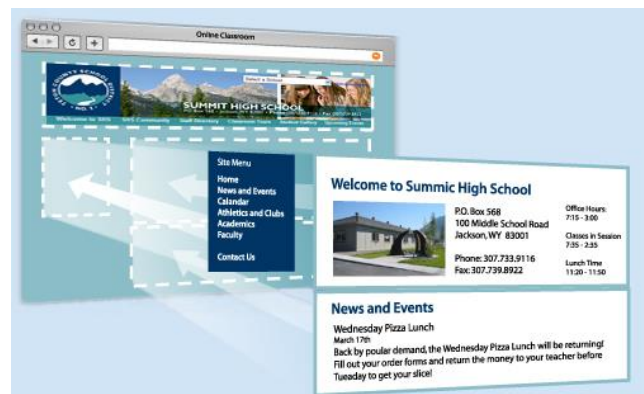
Some of the tools mentioned in this guide may not be available on your screen. This is due to the permission settings applied to the page you are viewing. If you are not an administrator, the Administrative Toolbar will only be visible to you on pages that you are authorized to work on.

Understanding Page Types

Throughout this manual, we will keep returning to the concept of page types. A Page Type in Presence refers to a specific webpage with a specific module embedded in it, i.e. the Calendar Page Type will add a page with a calendar embedded in it to your website. We will go into greater detail on adding page types and modules in following chapters.

Understanding Portlets

Portlets are another unique component of the system. A portlet is a web-part that divides a single webpage into unique areas of content. For instance, in the corresponding picture, each arrow refers to a specific portlet on the page. Presence users can create multiple portlets on a page to show different information. We will go into detail on defining and designing portlets later in this user guide.



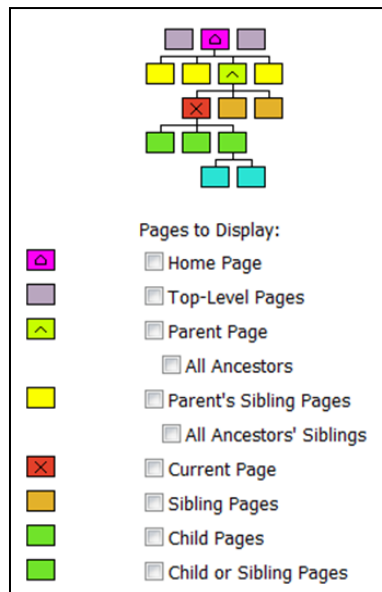
Understanding Hierarchies: Parent, Sibling and Child Pages

Throughout this user guide you will come across terms such as **Parent Page**, **Sibling Page** and **Child Page**. Understanding these terms is an essential component when creating the subpage hierarchy of your site.

Parent Page: A page which precedes a particular subpage. For example, if all the teacher pages of a school were published under the Staff Directory page, the Parent Page for those teacher pages would be the Staff Directory page.

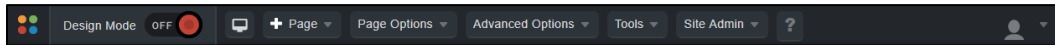
Sibling Page: A page that is available on the same hierarchical tier as your current page. Let's continue the example used in the Parent Page above. If all the teacher pages are listed under the Staff Directory, then those teacher pages will be referenced as Sibling Pages to one another.

Child Page: A subpage published under your current page. Therefore, in this scenario, all the teacher pages will be considered Child Pages in reference to the Staff Directory Page.

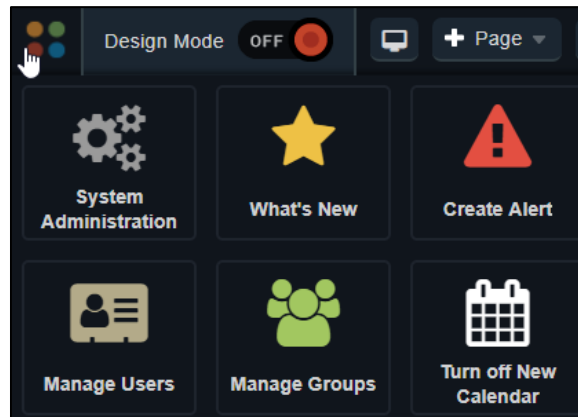


The Administrative Toolbar

The *Administrative Toolbar* contains many different components. Some features highlighted in this section will not be available to all users or on all sites. Site configuration, user permissions and page permissions of the current page will determine the specific options you see when using the toolbar:

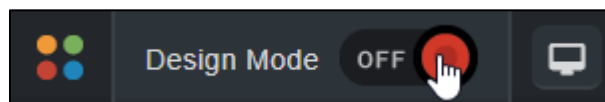


Shortcuts



Some commonly used features can be accessed under our new **Shortcuts** interface. These include links to the **System Administration** and the **What's New**. You will only see the shortcuts that your account is able to access.


Switching to Design Mode



You can toggle between **Design Mode** and **View Mode** by clicking the **On/Off** button to the right of **Design Mode**.

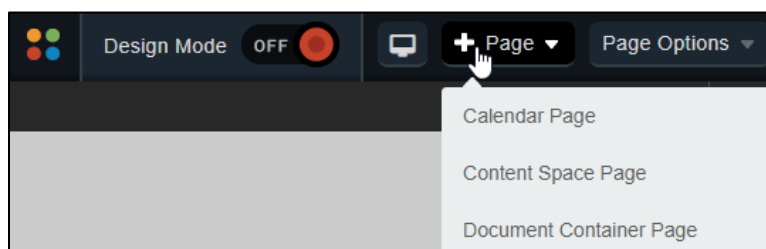
Page Preview



To preview what the page will look like on a desktop, tablet or mobile device, you can click the  icon.

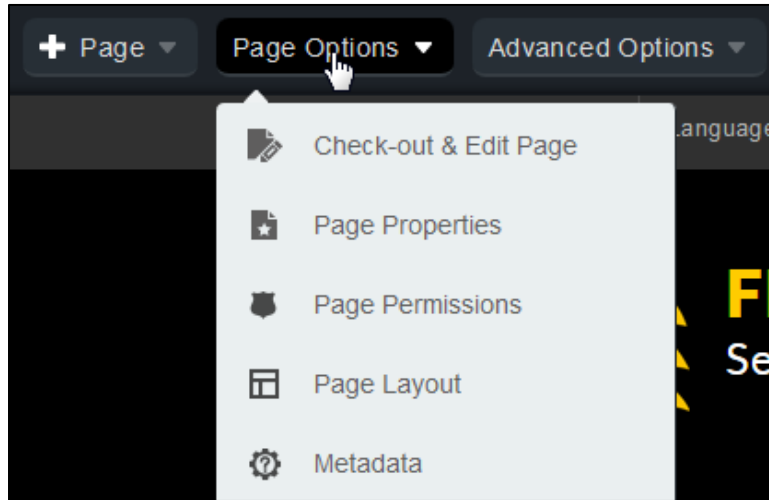
Creating Pages

To create a new subpage under your current page, hover over **Page** and choose the type of page you wish to create.

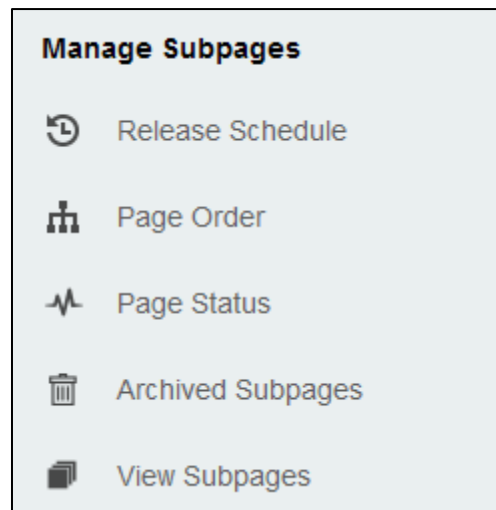


Editing Page Settings and Managing Subpages

To access page settings, such as **Check-out & Edit Page**, **Page Layout** or **Page Permissions**, hover over **Page Options** and choose the option you wish to use.

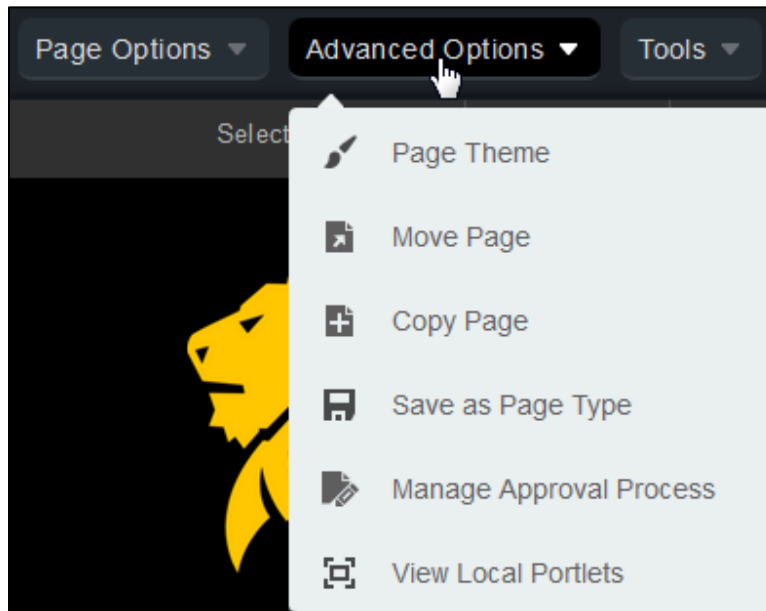


If you wish to make changes to subpages, such as changing the **Page Order** or changing the **Page Status**, hover over **Page Options** and choose the option you wish to use within the **Manage Subpages** section.



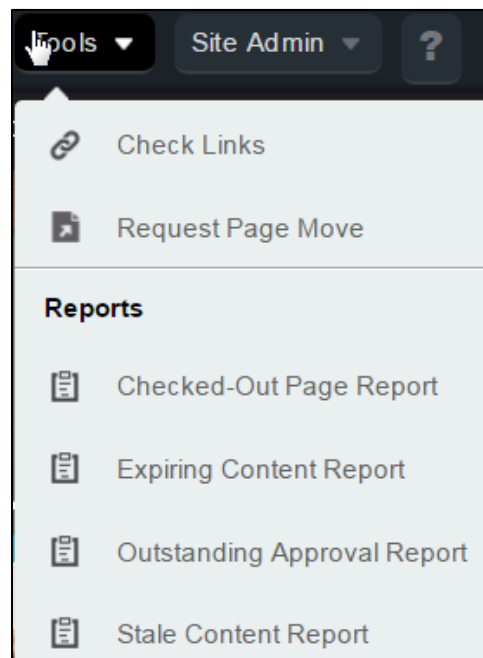
Setting a Teacher Page Theme, Moving Pages and Other Advanced Options

To access more advanced options, such as setting a teacher **Page Theme**, moving pages or managing the approval process, hover over **Advanced Options** and select the option you wish to use.



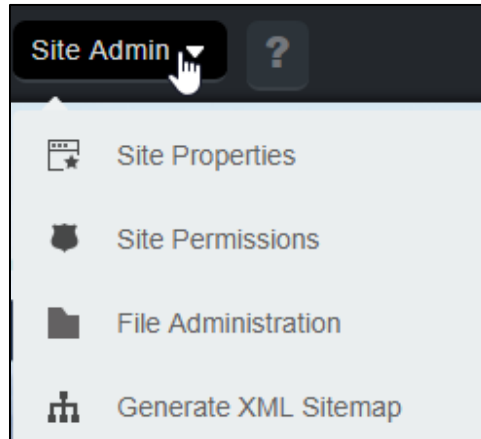
Running Tasks and Viewing Reports

To access common tasks and reports such as **Check Links** and **Checked-Out Page Report**, hover over **Tools** and choose the report or task you wish to access.




Accessing the Administrator Interface

In order to gain access to administrative options like **Site Properties** and **File Administration**, hover over **Site Admin** and select the option you wish to access.



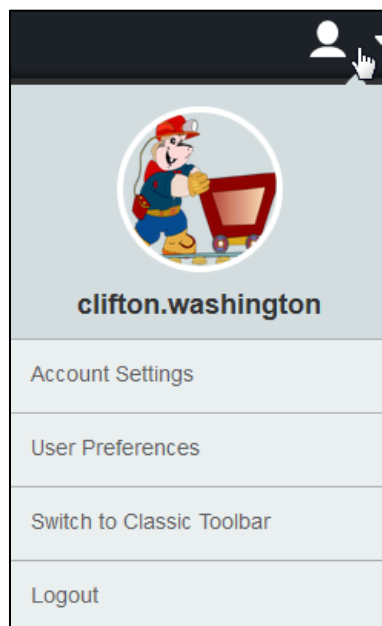
You can find a link to the **System Administration** page under the **Shortcuts**.

Getting Help

If you click on  in the menu, a new tab will open. Within this tab, you be able to access all the Presence documentation.

Updating Profile Information

On the right side of the toolbar, if you hover over  you can change your **Account Settings** and **User Preferences**.

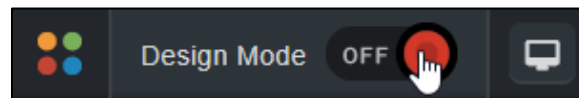


Switching to Design Mode

This option reveals the different portlets currently on your page. We briefly discussed portlets under the *Vital Information* section of this user manual. A portlet is a web-part that is used to divide an existing webpage into different content areas. It is important to remember that not all portlets are content (or text) portlets. We will describe the different portlet types later in this manual.

There are several different types of portlets available through the Presence system. We will detail some of the most commonly used portlets in this manual as many portlets apply mainly to technical IT personnel at organizations.

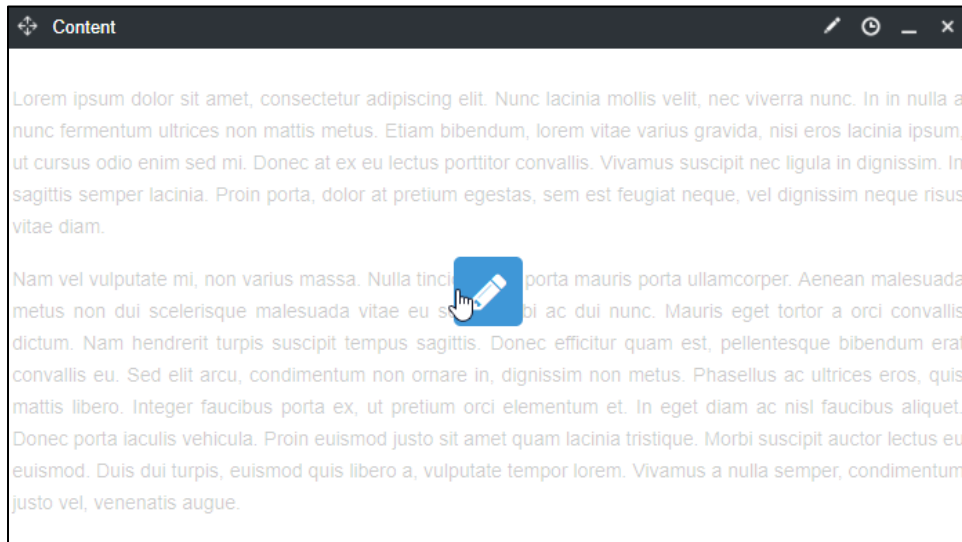
To edit portlets on an existing page, toggle on the **Design Mode** option.



When you switch to design mode, a dotted box will surround the editable regions on the page. Each portlet will be visible, as well as the editing options available for that portlet.






Along the top of the portlet, you will see a number of editing options. If you hover over a portlet that supports it, such as a content portlet, you will be able to access inline editing.



Depending on the type of portlet you will have some or all of the following options to edit a portlet:


Inline Edit: By clicking anywhere in the main content area, you can bring up the inline editor. Here you can make edits to the portlet directly on the page, with the portlet at the same size as when it is displayed on the page in **View Mode**.

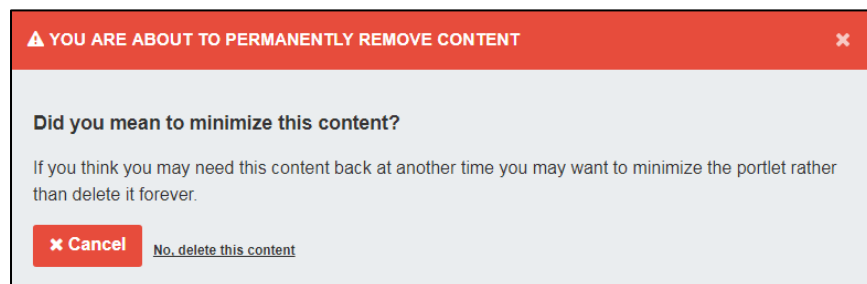
Edit: By clicking  on the content portlet, you can create and edit content to display within the portlet. You can also click  on most other types of portlets to change the configuration settings or the content of that portlet.

History: By clicking  on the portlet, you can change the version of the content being displayed. This option is only available for portlets that have version control.

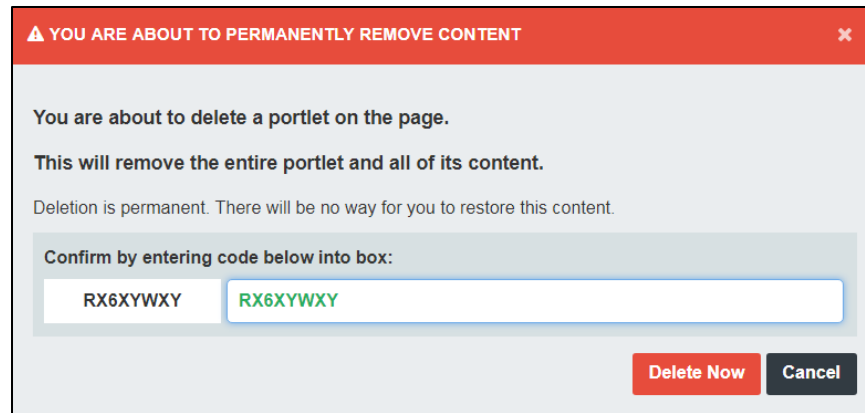
Minimize: Clicking the  button will minimize the portlet and hide it from view.

Maximize: If a portlet is already minimized, clicking the  button will make the portlet visible again.

Delete: Clicking the  button will delete the portlet from your page. Be aware that this is a permanent and irreversible decision. As such, when you attempt to delete a portlet, you will be presented with a message informing you that once a portlet has been deleted there is no way to undo this action.



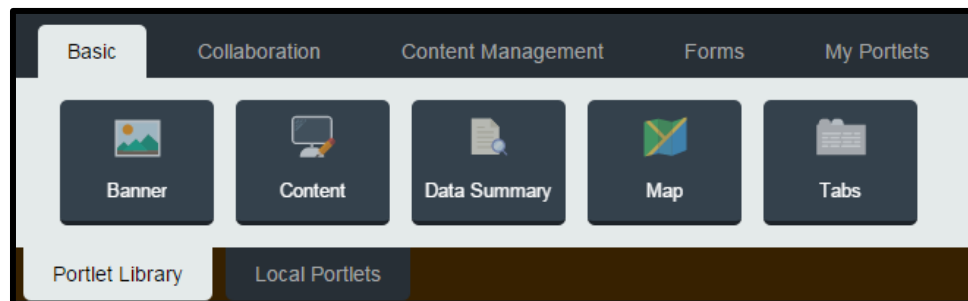
If there is even a chance you may need something from the portlet later, we recommend you choose **Cancel**. If you are certain you will never have need for the content again, choose **No, delete this content**.





You will now need to type the code from the left box into the **Enter Code** box. Once you have done so, you will be able to click **Delete Now** and complete the deletion process.

Adding Portlets to a Page

When you switch to design mode, you will be presented with a new toolbar. This toolbar will allow you to access both the **Portlet Library** and the **Local Portlets** by clicking between the two tabs. You can then choose the **Portlet Category** by selecting it along the top. Click and drag the type of portlet you want to use in to the desired region on the page below. The page will refresh and your new portlet will be in place.



 **Note:** While you can drag and drop portlets in to any region on your site, you cannot drag and drop portlets on to pageset (the area of the page where you generally see the side navigation). For pagesets, which can only be modified by Administrators, you will still use the **Add Portlet to Pageset** link and add portlets that way.

To move portlets within regions or between regions, click the  icon in the top left corner of the portlet and drag the portlet from its current location to wherever you would like to place it.

Portlet Types

By default when a user wishes to add a portlet to a page, they are given access to a wide range of portlets via the Portlet Library. Most sites also have a large number of Local Portlets they can select as well. The exact portlets available and the categories they are placed under may vary depending on your site; this is particularly true for any portlets found within the Local Portlets area. If you do not see a portlet in the Portlet Library, check the Local Portlets area.

PORTLET TYPE	DESCRIPTION
Basic Category	
Banner	The Banner portlet allows you to create a rotating slideshow of images to display on a page. You can determine how big the portlet appears on the page, how frequently it rotates and more. This is an older portlet that has been replaced with the new Carousel portlet.
Carousel	The Carousel portlet is intended as a replacement for the Banner portlet. It allows you to create a rotating slideshow of images to display on a page. Unlike with the Banner portlet, there is no need to resize your images to make them suitable for the portlet.
Content	A text portlet, where users can add content, videos, pictures, hyperlinks etc.
Data Summary	This portlet is used to display news content pages on a page. You can what news section to point to and what render template to use. For more information on this portlet, please see the <i>News Engine</i> guide.
Map	This portlet can be used to display the physical location associated with the site or any other location that you wish to highlight.
Quick Links	The Quick Links portlet allows you to easily create a set of links to commonly used pages and other resources.
Tabs	The Tabs portlet works like a normal content portlet except you can add tabs. Each tab works as its own content area within the tabs portlet. You can also set the width of your tabs portlet to best suit its placement.

Collaboration Category	
Advanced Data Display	This portlet allows you to create a news story on the page. This is the same portlet that is created when you create a News Content Page. For more information on this portlet, please see the <i>News Engine</i> manual.
Advanced Data Summary	Despite the different name, this portlet is identical to the Data Summary portlet. This portlet is used to display summaries of news stories on a page. You can choose what news section to point to and what render template to use. For more information on this portlet, please see the <i>News Engine</i> manual.
Calendar	Users have the ability to add a new calendar to a page. Refer to the <i>Calendar</i> manual for more information on calendars.
Discussion Forum	Users have the ability to embed a Discussion Forum into a page. Refer to the <i>Discussion Forum</i> manual for more information.
Document Container	Users have the ability to embed a Document Container into a page. Refer to the <i>Document Container</i> manual for more information.
Mini Calendar	Users have the ability to embed a Mini Calendar into a page. This calendar can linked with any calendar on the site.
Mini Upcoming Events	You can link a Mini Upcoming Events portlet to any calendar on the site. This portlet publishes a listing of upcoming events on to the page.
Photo Gallery	Users have the ability to embed a Photo Gallery into a page. Refer to the <i>Photo Gallery</i> manual for more information.
Content Management Category	
Advanced Site Navigation	This portlet controls what pages are displayed in the left-hand navigation. You have the ability to define which pages display as well as change the look and feel of the text in the navigation bar. This portlet will be a part of your sidebar pageset on most sites.
Presentation	Allows you to display information from the workspaces or knowledge repository on a normal content page.

Recommended Content	This portlet is intended for use specifically with the knowledge repository. It allows you to pick specific items or categories and display them on the page.
RSS Aggregator	Allows you to display an RSS feed on the page. This can be a feed from one of your sites or from an RSS feed found online. Please note that this portlet is not compatible with Atom feeds.
Site Map	This portlet displays a directory of pages from your site. You can show the top 3 or 4 levels of pages and whether or not to include hidden pages in the map.
Site Navigation	Despite the difference in name, this portlet is exactly the same as the Advanced Site Navigation portlet. This portlet controls what pages are displayed in the left-hand navigation. This portlet is found on the Pageset sidebar of most sites and is used to display child or sibling pages of the current page.
Staff Directory	This portlet allows you to display your staff. By default, three tabs will be displayed for Administrative Staff, Staff and Teachers. However you can edit the portlet to choose other groups. You can also control what information is displayed.
Web Content	This portlet is exactly the same as a content portlet where you have the ability to add content, videos, pictures, hyperlinks etc. Editing this portlet will take you to the WYSIWYG editor.
Forms Category	
Custom Form	This portlet allows you to insert a form portlet on the page and link it to one of the form templates. The form submissions can be emailed to a specified user or used to start a workflow. For more information on forms, please see the <i>Forms Engine</i> manual.
Poll	This portlet allows you to place a question on the page and allow visitors to the page to vote on the answer. The results can be displayed on the page in bar or pie chart form.
Survey	This portlet allows you to create a series of questions for visitors to answer.

My Portlets Category

All portlets in this category are context sensitive and they will only display information based on your user account. This also means that for guest users the portlets will not be visible on the page.


My Alerts	Allows you to view and manage any alerts you have created for calendars, blogs, discussion forums, etc.
My Cases	This portlet allows you to view any workflow cases that are associated with your account. For more information on workflow, please see the <i>Workflow</i> manuals.
My Profile	This portlet allows you to see your user profile. Can be a nice shortcut for users to make changes to their profiles.

Page Preview

The Page Preview feature allows you to preview what your page will look like when viewed on a desktop, tablet or mobile device.

To preview a page, click the  icon in the Administrative Toolbar.

This will bring up the Page Preview so that you can see what the page will look long other various devices.


 **Note:** *If the page is not public (or the site is not live), you will be prompted to enter your username and password on the page.*


You can choose to view the page on a **Desktop**, **Tablet** or **Mobile** view.

For the **Tablet** and **Mobile** options, you can also click  to rotate between a horizontal and vertical device orientation.



You can also navigate the site as usual when in Page Preview, so you are able to check a number of pages at once.

 **Note:** *While the Tablet and Mobile options look like a tablet and a mobile device, they are not touch enabled so you will need to use the scroll bar to scroll up or down the page.*

 **Note:** *There is a nearly endless number of possible screen sizes and resolutions that can be used on desktops, tablets or mobile devices. The Page Preview will give you a good idea of what the page will look like on each type of device, but the exact appearance will vary based on the device and the settings it is using.*

Adding a New Page

The **Page** menu is perhaps one of the most important features in the Presence solution. This menu allows you to create a page based around many of the modules that are available within the system.

These pages and their associated modules are known as a **Page Type**.

Definition: Page Types

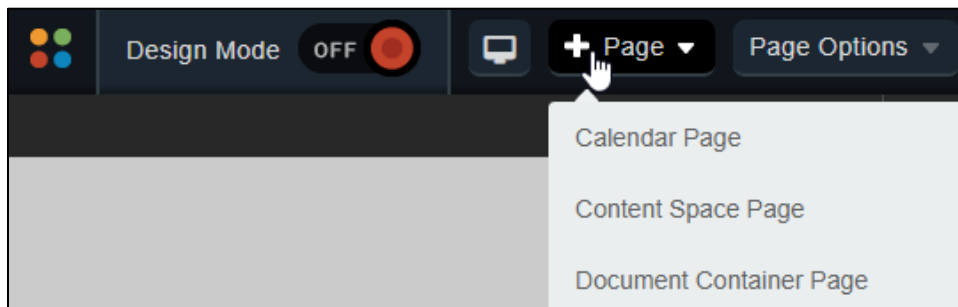
The different page types are:

TITLE	DESCRIPTION
Blog Page	A Blog Page allows users to add blogs to their website. This can be used by teachers to enhance the overall effect of their teacher pages, or it can be used by the school administration to keep parents updated on the current events around the district. This page type is not enabled by default.
Calendar Page	The Calendar Page adds Presence's calendar under a parent page.
Content Space Page	A Content Space Page is a blank webpage. This page type can be likened to a blank document in Microsoft Word®
Discussion Forum Page	This page type allows users to add a discussion forum to their websites. This can be used by administrators to encourage communication between students, parents and teachers, or even create private discussion forums that are solely catered to teacher communication. This page type is not enabled by default.
Document Container Page	A Document Container is an online repository of files and folders that are available for external users to download.
External Link Page	An External Link Page is a page that routes users to an external website, another area of your own website or a document. Clicking on an External Link Page will open that link in another window.
Form Page	A Form Page contains customized forms for your site. Information from these forms is routed to specific individuals and the submissions are saved in specific folders on the Presence server.
News Content Page	A News Content Page offers users an intuitive form to create and publish online news items. The News Content page , along

	with the News Section page , form Presence’s News Engine tool.
News Section Page	The News Section Page is the precursor to a News Content Page , and can be likened to the physical front page of a newspaper that contains news summaries. Users have the ability to publish multiple News Content Pages under a single News Section Page , which then renders the News Content Page summaries.
Photo Gallery	A Photo Gallery Page allows users to upload and publish pictures in a dynamic photo gallery.
Teacher Page	The Teacher Page is specifically designed for teachers and educators and features a variety of page types as part of the teacher page package.


Adding a New Webpage

To create a new page, navigate to the page where you wish to add a page and then go to **Page** in the **Administrative Toolbar** and select the type of page you wish to create.

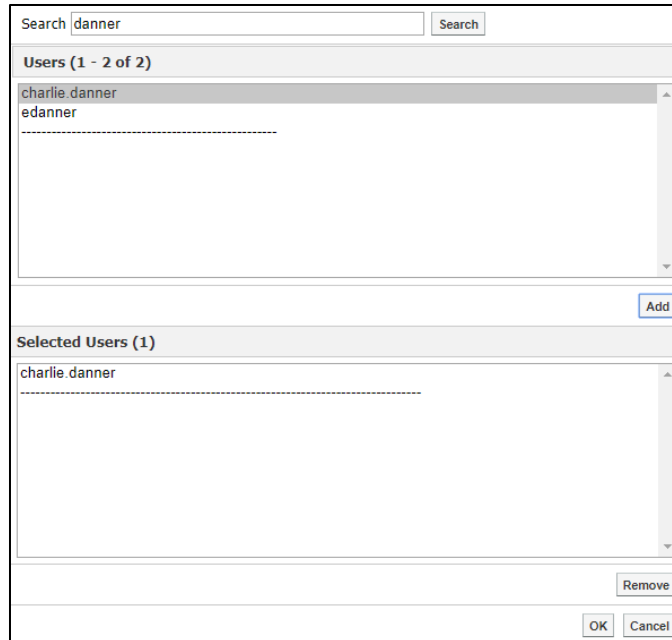


Fill in the **Page Name** field for your new page.


The **Page URL** field will automatically be filled in. The **Page URL** is used to build the Friendly URL used to access the page. If you wish to make modifications to the **Page URL**, click  and then you can change the text. Keep in mind that only alphanumeric characters, underscores and dashes can be used. Any other characters will be automatically removed.

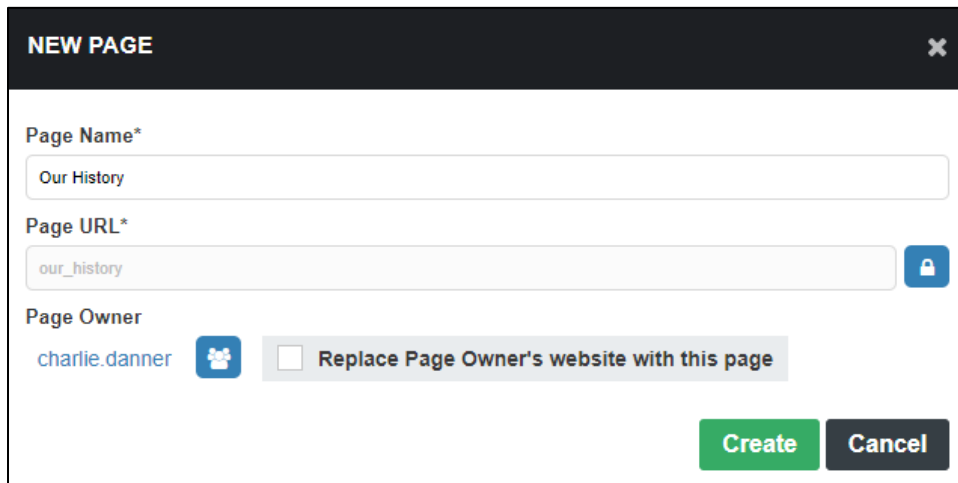
By default, you will be assigned as the **Page Owner**. If you wish to set someone else as the owner, click the  icon.

When the User Picker opens, choose the user you wish to make the owner, and click **Add** then click **OK**.



If you want to set the page as the user's homepage in their user profile, click **Replace Page Owner's website with this page**.

 **Note:** On some sites, you may also have a **Category** drop-down that you can use to select a category for the page.



Once you have finished configuring the new page, click **Create Page**.

You will then be routed to the page you created.

You will then be routed to the WYSIWYG editor. For more information on how to save or publish your page, refer to *Editing a Page* section of this manual.

Import New XML Page

Only administrators have the ability to Import New XML Pages. Therefore, a detailed description has been included in the *Presence Administrator Manual*.

Page Options

The **Page Properties** menu contains a series of system specific tools. These tools are the core of the Presence system and it is essential that users learn how to navigate through them in order to use the solution:

Editing a Page

In order to edit the content of existing pages on your website you can use **Design Mode** and click **Edit** on the content portlet. Alternatively, you can click on **Check-out & Edit Page** under **Page Options**. You will be routed to another page that is divided into three main headings:

Page Properties

The **Page Properties** section allows you to change the title of a page on the website. Simply type in the new name of your page in the **Title** field and the system will automatically update the **Name** on the page.

Page Content


The Page Content section contains Presence's WYSIWYG (What You See Is What You Get) Editor. The buttons in this editor are similar to the buttons in Microsoft Word®. A detailed overview of the editor has been included as an appendix to this user guide. Refer to *Appendix A* for more information.

Page Administration

The **Page Administration** section contains user specific information on the page. This section is divided into 6 main components:

Page Owner

In institutions, the task of maintaining and updating content on websites is often distributed between different resources. The **Page Owner** field states the ownership of a page.

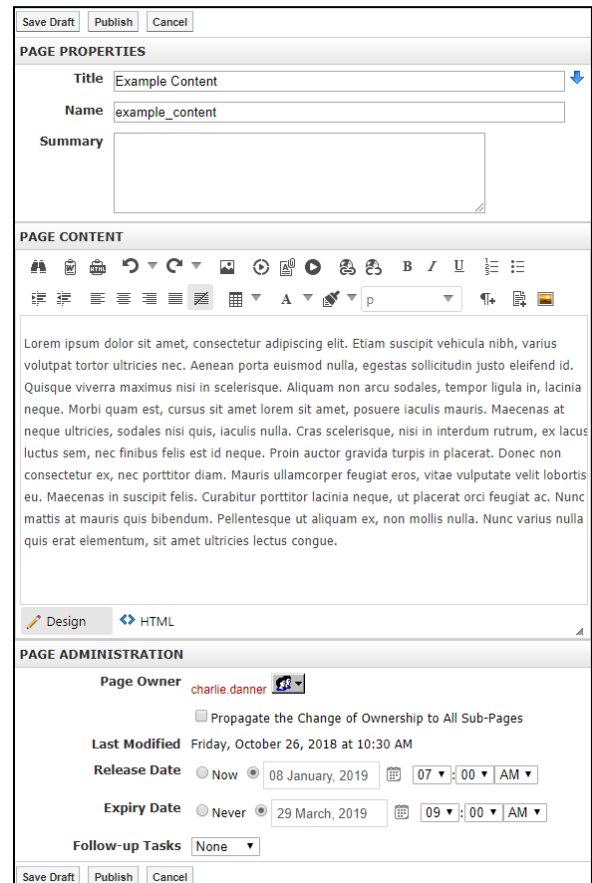
Users and administrators also have the ability to change the ownership of a page to another user. To do so, click the  icon and select the user or group who you wish to grant ownership to.

Last Modified

The **Last Modified** section displays when the page was last edited.

Release Schedule

The **Release Date** and **Expiry Date** fields allow you to schedule when the page will be visible to users. The Release Date determines when the page will be made public and the Expiry Date determines when the page will no longer be public. By default, the Release Date will be set to **Now** and the Expiry Date will be set to **Never**.



The screenshot displays the 'Page Properties', 'Page Content', and 'Page Administration' sections of the Presence user interface. At the top, there are buttons for 'Save Draft', 'Publish', and 'Cancel'. The 'PAGE PROPERTIES' section includes fields for 'Title' (Example Content), 'Name' (example_content), and a 'Summary' text area. The 'PAGE CONTENT' section features a rich text editor with various formatting tools (bold, italic, underline, list, link, image, etc.) and a text area containing placeholder text. Below the editor, there are tabs for 'Design' and 'HTML'. The 'PAGE ADMINISTRATION' section shows the 'Page Owner' as 'charlie.danner', a checkbox for 'Propagate the Change of Ownership to All Sub-Pages', 'Last Modified' as 'Friday, October 26, 2018 at 10:30 AM', 'Release Date' set to 'Now' with a date picker for '08 January, 2019' at '07:00 AM', 'Expiry Date' set to 'Never' with a date picker for '29 March, 2019' at '09:00 AM', and 'Follow-up Tasks' set to 'None'. At the bottom, there are buttons for 'Save Draft', 'Publish', and 'Cancel'.

Follow-up Tasks

Page Owners can keep track of their pages by simply scheduling reminders for specific pages. By clicking on the **Review** option in the drop-down menu and selecting a date from the embedded calendar, page owners can ensure that their pages are never out of date. On the scheduled date the system triggers an email to the page owner, reminding the owner of their scheduled task.

Similarly, by clicking on **Archive** in the drop-down menu page owners can schedule specific pages to be archived on the site on a specific date.

The **Move** option allows Page Owners to move the page to a new location. You can select to move the current page and all the subpages or just the subpages. For the move date you can specify a date using the calendar to select or schedule the move for when the page is a certain number of days old.

Approval Notes

Administrators at your organization may choose to apply approval workflows to the page you are editing. In such a scenario, changes made by the content author, or page owner, are not made live on the site unless it is approved by a designated individual or individuals. Under the **Approval Notes** section, you, the page owner, can include notes on the changes made which will then be routed to the approver.

Publishing Your Page

After editing your page using the WYSIWYG editor, you will have three options available to you: **Save**, **Publish** and **Cancel**.

PUBLISHING YOUR PAGE	
Save	Clicking the Save button saves all the changes made to your webpage on Presence's system but the changes will not yet appear (or be made live) to visitors of the page. This allows you to keep working on the page over multiple sessions and reveal the changes only when you are ready.
Publish	Clicking on Publish will make your changes live immediately.
Cancel	Clicking on Cancel will discard all the changes.


Check-in Page

Pages are automatically checked in when you **Publish** your page or **Cancel**. Pages that are checked out will be locked to other authors of the page. Only users with full control on the page have the ability to override a page lock and check-in a page that is currently checked-out by another user.

A page does not get checked in if you do not click **Publish** or **Cancel**, or if you navigate to a different page while still in the editor.

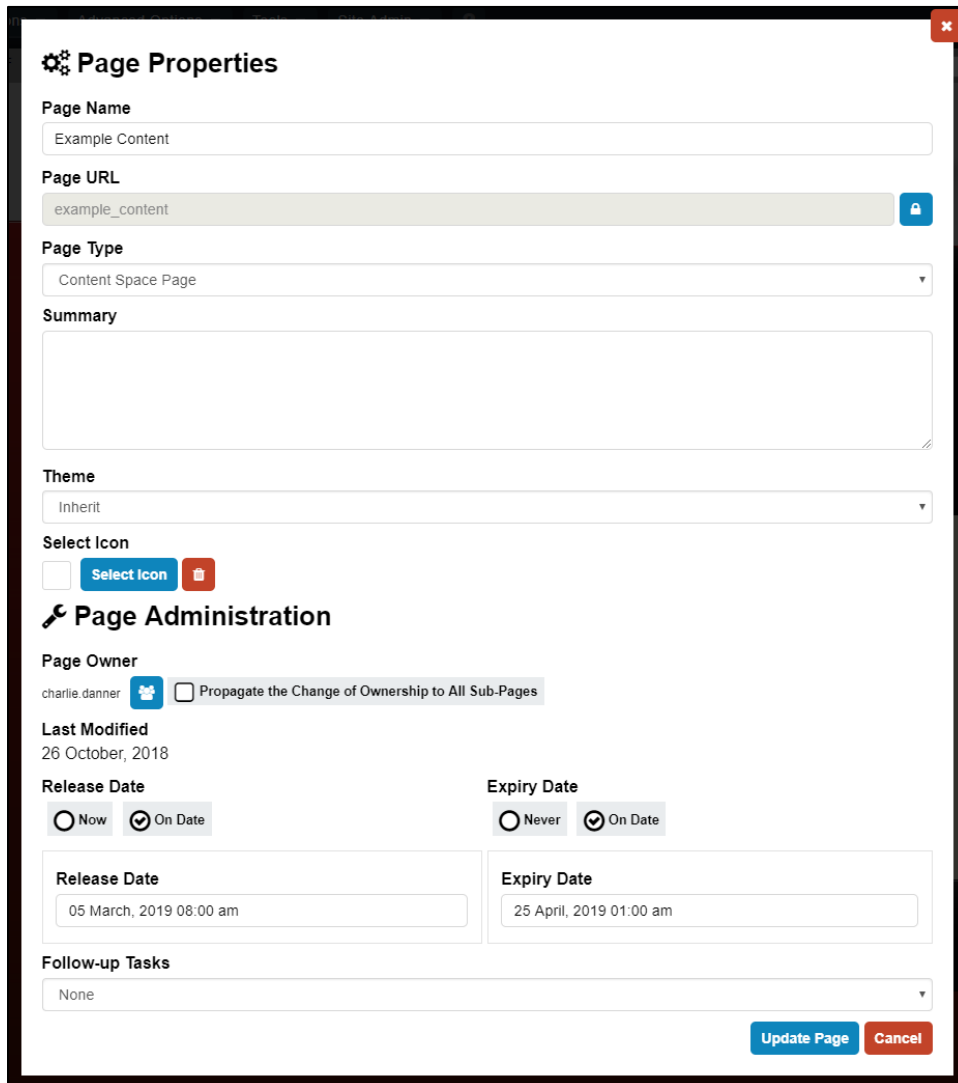
Check-out & Edit Page

Pages that have been checked-in will be made available to other users through the **Check-out & Edit Page** option. When you see this option, simply click on it to access the WYSIWYG editor.

 **Note:** If you have not checked out the page already, you will see *Check-Out & Edit Page* as the menu option. If you have already checked out the page, you will see *Edit Page* as the menu option.

Page Properties

The **Page Properties** section under the **Page Options** menu contains key information about the page you are viewing. This section is divided into two main headings: **Page Properties** and **Page Administration**.



The screenshot shows a modal window titled "Page Properties" with a close button in the top right corner. The form is divided into two main sections:

- Page Properties:**
 - Page Name:** A text input field containing "Example Content".
 - Page URL:** A text input field containing "example_content" with a lock icon on the right.
 - Page Type:** A dropdown menu currently set to "Content Space Page".
 - Summary:** A large empty text area for entering a summary.
 - Theme:** A dropdown menu currently set to "Inherit".
 - Select Icon:** A checkbox (unchecked) and a "Select Icon" button with a red icon.
- Page Administration:**
 - Page Owner:** "charlie.danner" with a user icon and a checkbox for "Propagate the Change of Ownership to All Sub-Pages" (unchecked).
 - Last Modified:** "26 October, 2018".
 - Release Date:** Radio buttons for "Now" (unchecked) and "On Date" (checked). Below is a text input field with "05 March, 2019 08:00 am".
 - Expiry Date:** Radio buttons for "Never" (unchecked) and "On Date" (checked). Below is a text input field with "25 April, 2019 01:00 am".
 - Follow-up Tasks:** A dropdown menu currently set to "None".

At the bottom right of the form are two buttons: "Update Page" (blue) and "Cancel" (red).


Page Properties

This section is divided into six main headings:

Page Name

You can change the title of your web page by simply typing the new name here.

Page URL

The Page URL field will automatically be filled in. The Page URL is used to build the Friendly URL used to access the page. If you wish to make modifications to the Page URL, click on the  icon and then you can change the text. Keep in mind that only alphanumeric characters, underscores and dashes can be used. Any other characters will be automatically removed.

Page Type

Displays the page type of the current page.

Summary

A description of the page.

Page Theme

This determines the appearance of the page. It is recommended not to change this setting as it is controlled and maintained by the administrators at your organization. The notable exception would be if teacher page themes have been enabled for your site and you wish to pick a teacher page theme. If you ever wish to revert back from a teacher page theme to theme used by the parent page of your page (in most cases, this will be the site theme) then you can change the theme to **Inherit**. More information on using teacher page themes will be provided when we talk about the *Page Theme* option.

Icon

Click **Select Icon** to choose an icon to be associated with your page. In certain templates, this icon will appear beside the page in the menu. In many other templates, this icon will not be used.


Page Administration

This component is similar to the *Page Administration* section we covered in the *Editing a Page* section of this manual.

The **Page Administration** section contains user specific information on the page. This section is divided into 4 main headings:

Page Owner

The **Page Owner** field lists who is the owner of the page. That user has full control over the page. Here users and administrators also have the ability to change the ownership of a page to another user.

To do so, simply click on **Choose User/Group**  then remove the current owner and select the user or group you wish to grant ownership to.

If you check the option **Propagate the Change of Ownership to All Sub-Pages** this will make the page owner of the current page, the page owner of all the subpages as well.

Last Modified

The **Last Modified** section informs a page owner on when that page was last edited.

Release Schedule

The **Release Date** and **Expiry Date** fields allow you to schedule when the page will be visible to users. The Release Date determines when the page will be made public and the Expiry Date determines when the page will no longer be public. By default, the Release Date will be set to **Now** and the Expiry Date will be set to **Never**.

Follow-up Tasks

Page owners can keep track of their pages by simply scheduling reminders for specific pages. By clicking on the **Review** option in the drop down menu and selecting a date from the embedded calendar, page owners can ensure that their pages are never out of date. On the scheduled date the system triggers an email to the page owner, reminding him/her of the due task.

You may also choose to **Move** the page to another location. Once you select the Move task click **Browse** to select a **Target Location**. This target location will be the new parent page of the page you are moving. You can also choose to move the current page and all its subpages or move just the subpages of the current page (this option can be useful if you would like to move all your news stories from recent news to an older news area at the end of the school year). You also have the option make the move happen on a specific date or when the page is a specific number of days old.

Similarly, by clicking on **Archive** in the drop down menu page owners can schedule specific pages to be archived on the site.

Once you have completed your configuration changes, click **Update Page** to save those changes.

Page Permissions

Assigning the correct page permissions is often one of the most critical steps in ensuring consistency and accountability of content on websites. Using the **Page Permissions** console administrators have the ability to assign and remove permissions for groups and users, while individual users have the ability to see who else has access to their pages.

The **Page Permissions** component is broken into two main categories: **Direct Permissions** and **Actual Permissions**.

Understanding Direct Permissions

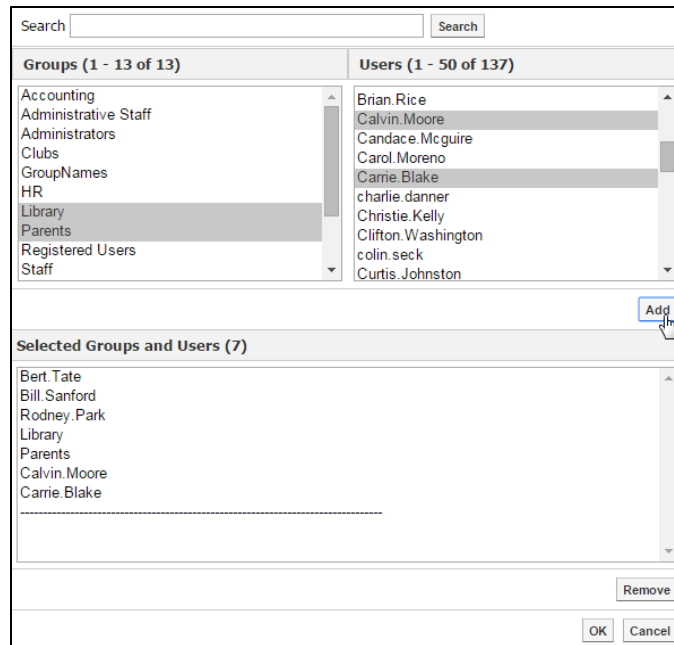
The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the page you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions from parent pages as well.

Add Permissions

In order to grant permissions to a group or individual user on a specific page, simply click on the **Add** button under the group/user list.

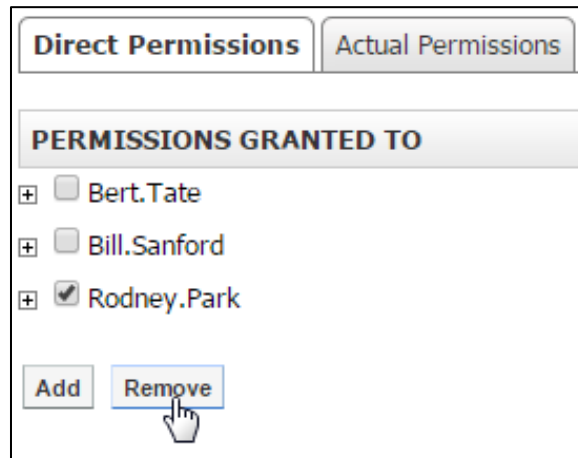
In the following window click on the groups and users and click **Add**.

Click **OK** to include permissions.



Remove Permissions

To remove permissions from a group or user simply click on the checkbox next to the name and click on **Remove**.



Define Permissions

When users are added into the permissions box, they are given **Read** permission by default. The definition of each permission is included below:

MINIMUM PERMISSIONS REQUIRED	FULL CONTROL	CREATE	DELETE	READ	WRITE
Access Page				X	
Access Administrative Toolbar (with limited Page Options)				X	X
Delete Portlets on Page			X	X	X
Access Manage Subpages Section of Page Options		X		X	X
Create a Child Page		X		X	X
Access Page Permissions	X	X	X	X	X
Access Metadata		X		X	X
Access Version History on Portlets		X		X	X

To configure a group or user's permissions click on the **+** icon next to the user or group's name. Check the appropriate permission boxes and click on **Apply** in the list to enable the permission.

Understanding Inheritable Permissions

By checking the **Allow Inheritable Permissions From Parent to Propagate to This Object** box under the **Page Permissions** window individuals with access to the parent page will also have access to the page you are viewing. This will now be considered an **Actual Permission** of the child pages.

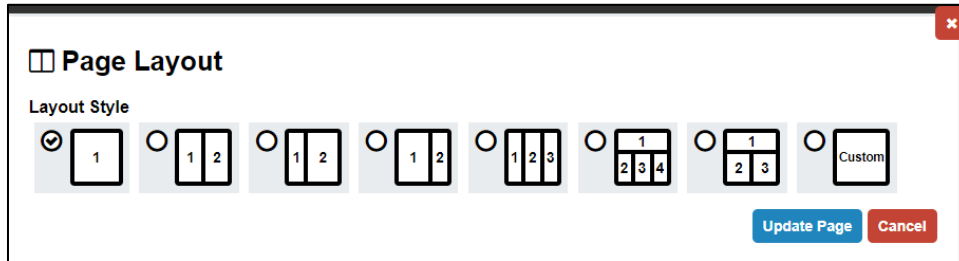
Understanding Actual Permissions

The **Actual Permissions** tab lists the individuals and groups who have inherited access to the page you are viewing. These are often administrators or users assigned to monitor all the child pages under a parent page.

Page Layout

By default, the layout of a **Content Space Page** is single large area for you to enter text via a content portlet. If you want to have other elements on the page such as a mini-calendar, or a news area, you may want to consider changing the page layout to one that allows for multiple regions.

The **Page Layout** option allows you to select from a range of standard layout themes in the system. Simply click on the corresponding radio button to select a particular template. You can also create a custom layout, however this requires coding the layout yourself.



Note: All the preset Page Types are set to the first Layout Style by default.

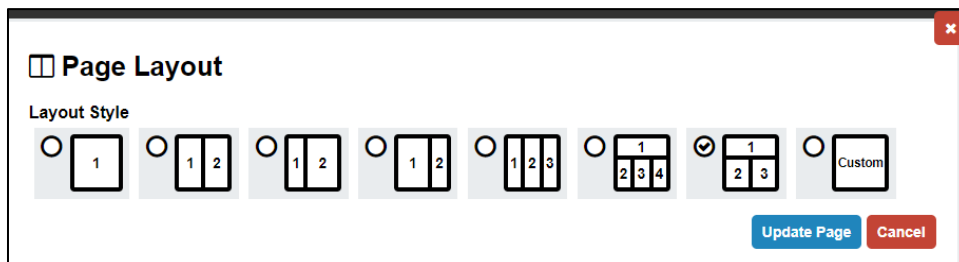
Page Layout: A Scenario

There are many templates that you can select from, therefore we are going to select one template and apply it to a hypothetical scenario. In this scenario we are setting up a page for a monthly book club and we have decided we want multiple regions for portlets.

We have already added a **Content Space Page** under a specific parent page. Now we must go to **Page Options** in the **Administrative Toolbar** and click on **Page Layout** to select the skeleton structure of the page.

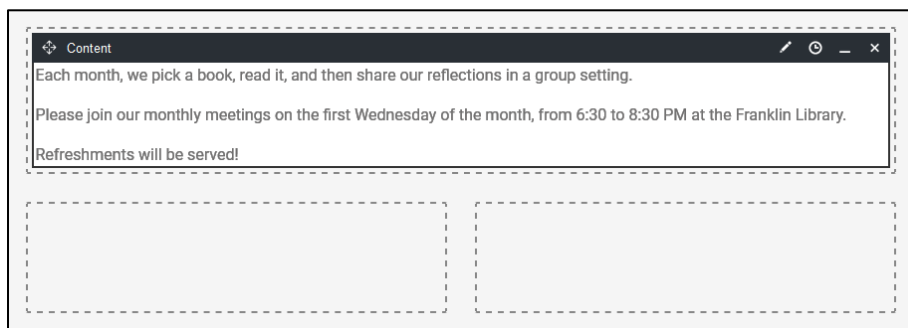
At first, the **Page Layout** window contains a single blank page layout.

We then select the 7th layout by clicking on the corresponding radio button. This will give you a region with 100% width at the top, with two regions in a row below it with 50% width each.



So far we have established the skeletal structure of our page, but we have yet to add any portlets. The first region has a portlet in it as that is the original content area that was available with the **Content Space Page**. We have to add portlets into Region 2 and Region 3 as they are still empty. At this point, click **Update Page** to apply the layout changes to the page.

We are now routed back to the content space page where we switch to **Design Mode** in order to add more portlets to the page. The page will look something like this:



In the view above, the **Content** portlet is part of **Region 1** of the Page Layout. **Region 2** and **Region 3** are still empty, but now we have the ability to add portlets by dragging new portlets into those regions.

We decide to add a portlet into **Region 2**. We select **Content** and drag it in to the dotted box on the left. We can then edit the content portlet to add whatever content we wish.

We then decide to add another portlet, this time within **Region 3**. For **Region 3** we decide to add an **Upcoming Events** portlet. We can then configure the portlet to point to a calendar.

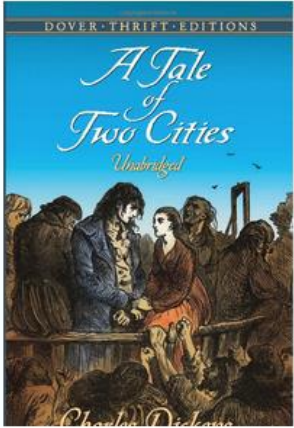
Once we configure everything, our page will have 3 portlets on it in 3 different regions. It will look like this:

Each month, we pick a book, read it and then share our reflections in a group setting.

Please join our monthly meetings on the first Wednesday of the month from 6:30 to 8:30 PM at the Franklin Library.

Refreshments will be served!

This Month's Book



Upcoming Events

NOV 04	Book Club Meeting 6:00PM - 8:00PM
DEC 02	Book Club Meeting 6:00PM - 8:00PM
JAN 06	Book Club Meeting 6:00PM - 8:00PM
FEB 03	Book Club Meeting 6:00PM - 8:00PM
MAR 02	Book Club Meeting 6:00PM - 8:00PM

[More Events >](#)

Changing the Order of Portlets

We can still alter the layout of portlets on the page by dragging and dropping the portlets from within one region or between one region and another.

Custom Layout

If you would rather use a custom layout, choose **Custom**.



When creating a custom template for your page layout, you can use divs or tables to determine the layout of the page. Within these divs or tables use **<column order="[column number]" />** to determine where your regions will be placed on the page. Each column represents its own region where you may place portlets.

When you have finished working with your layout, click **Update Page** to save your layout. The template will be checked to ensure validation and the new layout will be saved.

Metadata

Metadata holds specific attributes of a webpage. You can help boost your SEO by filling out the **Description** and **Keywords** fields on a page.

You can access the metadata by going to **Page Properties -> Metadata**.


Description: The Description field allows you to provide a description of the page. This can make it easier for users to find your site.

Keywords: The Keywords field allows you to enter keywords relevant to the current page.

Rating: The Rating field allows you to rate the quality of the page.

Header Line 1: Used as the primary header for pages using one of the Teacher Page Themes.

Header Line 2: Used as the secondary header for pages using one of the Teacher Page Themes.

 **Note:** Depending on your site configuration, some of these fields may not appear. Also, it is possible that additional fields will be available.

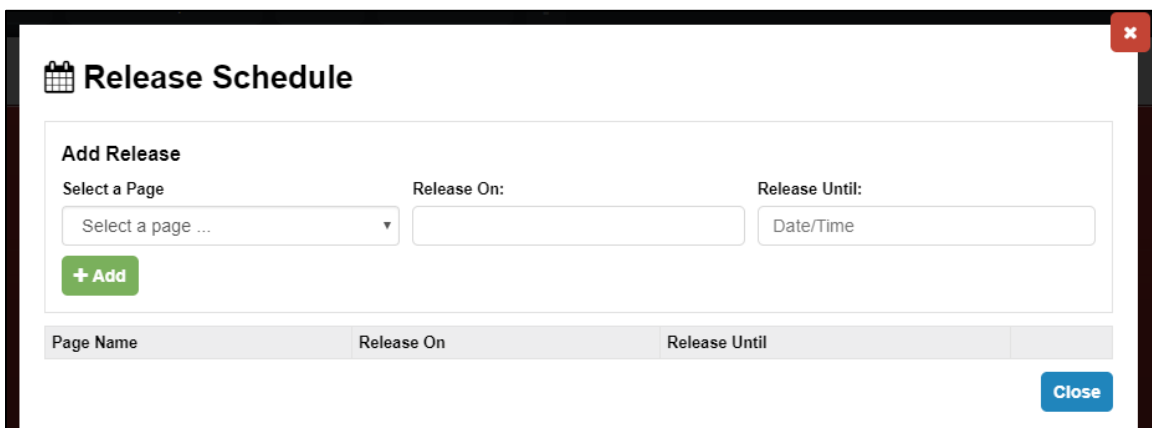
This component of the Presence tool is applicable to web experts; regular users will not be required to use this tool.

Release Schedule

Specifically designed to ease the workload for users who are responsible for maintaining multiple pages, the **Release Schedule** allows you to schedule the live date of created subpages on the system. This feature ensures that you do not have to create and complete pages in a hurry, instead you can plan ahead and release pages only when you are ready to make them live. For instance, teachers have the ability to create their teacher pages during the summer break and schedule them to go live on the website at the beginning of the semester.

When using the **Release Schedule** it is important to remember that it is available in the *Administrative Toolbar* and therefore the subpages listed within it are specific to the page you are currently viewing.

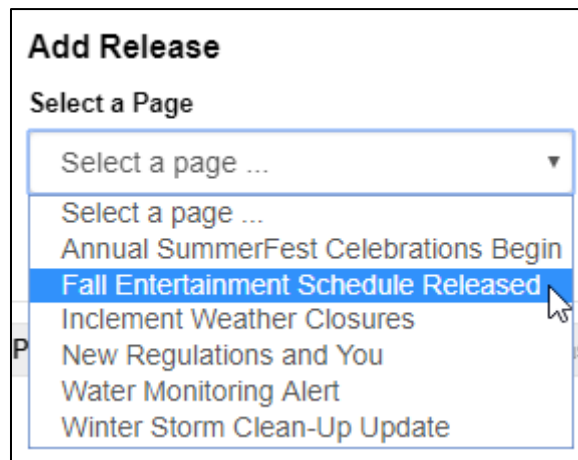
Once you have decided which subpages you wish to release, simply click on **Release Schedule** under **Page Properties** and select the **Release On** and **Release Until** time and date from the drop downs provided.



 **Note:** You can also set the release schedule for an individual page by navigating to the page in question and then hovering over **Page Options** and clicking **Page Properties** in the *Administrative Toolbar*.

Adding a Page to the Release Schedule

Using the **Select a Page** drop-down, choose the page you want to set a release schedule for.



Click the **Release On** field to set when you want the page to first be available.

Release On:

Sunday, July 01, 2018 09:00 AM

May 2018


Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Time 09 am ▾ : 00 ▾

Now
Submit

Click **Submit** to save the desired date/time.

Click the **Release Until** field to set when you want the page to no longer be available.

 **Note:** For pages that are scheduled to be released on a certain date and time, but are meant to remain on the website indefinitely, simply define the **Release On** field in the Release Schedule and leave the **Release Until** field blank.

Click **Submit** to save the desired date/time.

Add Release

Select a Page Release On: Release Until:


Fall Entertainment Schedule Relea: ▾ Sunday, July 01, 2018 09:00 AM Thursday, December 20, 2018 09:00 A







+ Add

Click the **Add** button to add the page to your schedule.

Managing your Release Schedule







Below the **Add Release** section of the release schedule, you will see a list of all the subpages that are currently scheduled for release.

To update the times set for a specific page, click the  icon to the right of that page.

Page Name	Release On	Release Until	
Annual SummerFest Celebrations Begin	Saturday, August 04, 2018 12:00 AM	Saturday, August 25, 2018 12:00 AM	 
Fall Entertainment Schedule Released	Sunday, July 01, 2018 09:00 AM	Thursday, December 20, 2018 09:00 AM	 
Winter Storm Clean-Up Update	Wednesday, May 30, 2018 07:24 AM	Saturday, June 02, 2018 12:00 AM	 

[Close](#)

Click in the **Release On** and **Release Until** fields to update your desired date and time.

Release On	Release Until	
Saturday, August 04, 2018 12:00 AM	Saturday, August 25, 2018 12:00 AM	 
Sunday, July 01, 2018 09:00 AM	Thursday, May 31, 2018 12:00 AM	 
Wednesday, May 30, 2018 07:24 AM		 

May 2018

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Time: 12 am : 00

[Now](#) [Submit](#)

[Close](#)

After updating the times, click the  icon to confirm your change.

If you wish to remove an item from the Release Schedule, click the  icon to the right of the event.

A message will pop-up letting you know that by removing a page from the Release Schedule, you are making it available to visitors to the site.

Removing Page from Release Schedule

The current page is bound by a release schedule and is currently only visible during the time you have specified. If you delete this schedule, the page will be immediately visible.

If you wish to remove the page from the site, please go to 'Page Options' → 'Page Status' and archive the page.

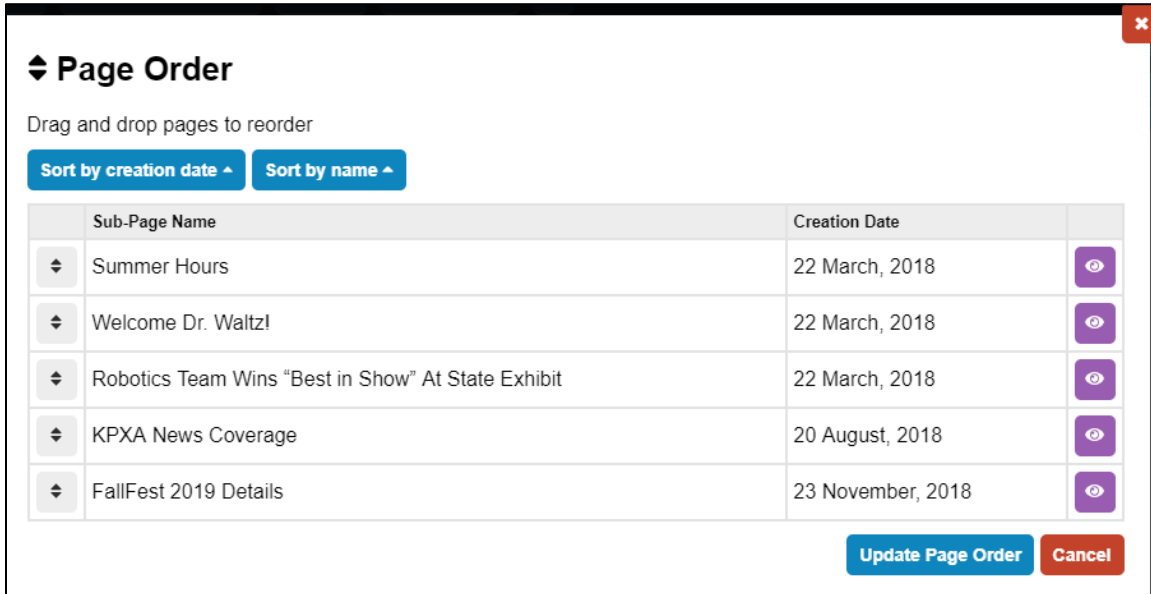
Delete
Cancel

Click **Delete** to confirm the removal.

Page Order

When you first create a new page, it will automatically be added to the bottom of the list of subpages for the page you are on. This is the case both for the horizontal menu across the top and the vertical sidebar menu.

To change the order that subpages appear, go to **Page Options** -> **Page Order**.



Page Order

Drag and drop pages to reorder

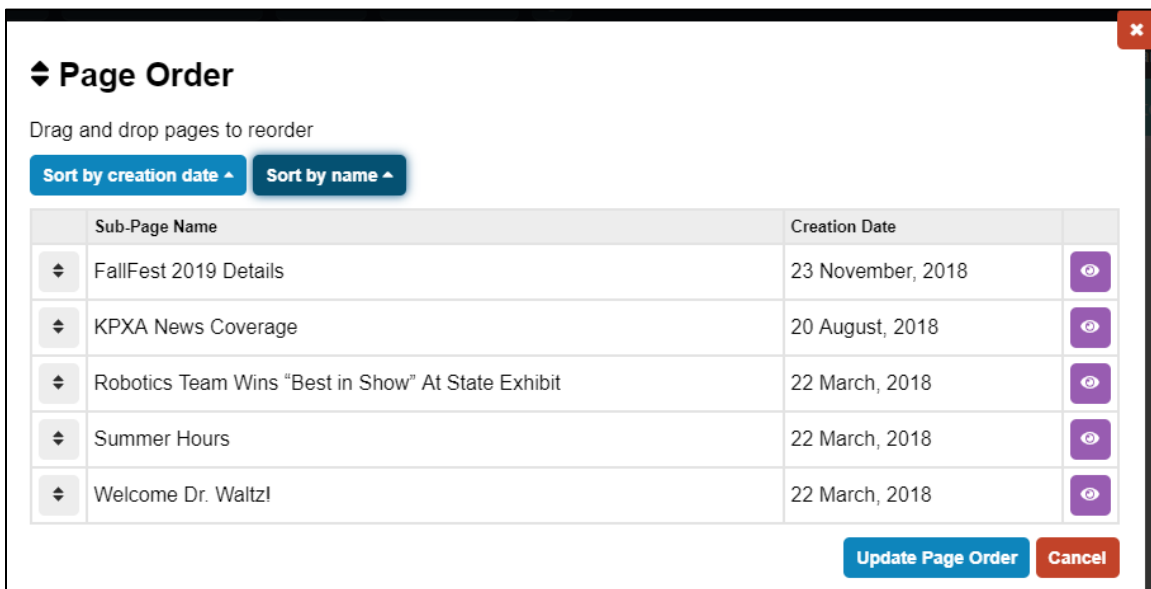
Sort by creation date ▾ Sort by name ▾

	Sub-Page Name	Creation Date	
⇅	Summer Hours	22 March, 2018	👁
⇅	Welcome Dr. Waltz!	22 March, 2018	👁
⇅	Robotics Team Wins "Best in Show" At State Exhibit	22 March, 2018	👁
⇅	KPXA News Coverage	20 August, 2018	👁
⇅	FallFest 2019 Details	23 November, 2018	👁

Update Page Order Cancel

Click and drag the ⇅ icons to rearrange the pages to your liking.

You can also sort the pages by creation date or name (in ascending or descending order) by clicking on the **Sort by creation date** and **Sort by name** buttons.



Page Order

Drag and drop pages to reorder

Sort by creation date ▾ Sort by name ▾

	Sub-Page Name	Creation Date	
⇅	FallFest 2019 Details	23 November, 2018	👁
⇅	KPXA News Coverage	20 August, 2018	👁
⇅	Robotics Team Wins "Best in Show" At State Exhibit	22 March, 2018	👁
⇅	Summer Hours	22 March, 2018	👁
⇅	Welcome Dr. Waltz!	22 March, 2018	👁

Update Page Order Cancel

When you have finished rearranging the pages, click **Update Page Order** to save your changes.

Page Status

After creating pages you have the ability to show or hide them on your site. Hidden pages are different than archived pages; users who have a direct URL will still be able to access a hidden page as it is still live on your website. As mentioned earlier, archived pages are essentially saved pages that you can make live at any time.

To archive or change the status of a page, navigate to the parent page of the page you wish to update and then in the Administrative Toolbar, hover over **Page Options** and click **Page Status**.


Changing Page Status

Hiding and showing pages is easy: click on the **Show**, **Hide from Menu** or **Hide All Content** option next to the title of the page. The key point to understand how the visibility of a page can be used to enhance the impact of your website.







Often content authors make the mistake of adding too many subpages to their website. These pages negatively impact the readability of the site as nobody likes being confronted with an unwieldy menu. To avoid this common pitfall, content authors can create hidden subpages and simply link to them from another area of the website.

Hide All Content allows you to hide your subpages, as well as hide the page from top menu bar and the side menu bar. If there is a calendar within your hidden section, it will not be visible from other calendars on your site. You will not be able to see any subpages of the page from the side menu bar.

Hide from Menu allows you to remove a page from the top menu bar and sidebar menu, without hiding the items that are contained within. The calendars under the hidden page will be visible to other calendars and the side menu bar will display any subpages of the current page.

 **Page Status**
✕

- Show** will display the page in the menu
- Hide from Menu** will hide the page from the menu
- Hide All Content** will hide the page and any objects under the page

Sub-Page Name	Status	
<input type="checkbox"/> Annual SummerFest Celebrations Begin	<input type="radio"/> Show <input checked="" type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Inclement Weather Closures	<input type="radio"/> Show <input type="radio"/> Hide from Menu <input checked="" type="radio"/> Hide All Content	
<input type="checkbox"/> New Regulations and You	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Fall Entertainment Schedule Released	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Winter Storm Clean-Up Update	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Water Monitoring Alert	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	

Archive The selected page(s) and its(their) sub-pages will be archived.

Close







Archiving Pages

Archived pages are those pages that are saved and cannot be accessed by anyone except page owners and administrators.

To archive a subpage select the checkbox next to the name of the page(s) you want to archive and click **Archive**.

Page Status

- **Show** will display the page in the menu
- **Hide from Menu** will hide the page from the menu
- **Hide All Content** will hide the page and any objects under the page

Sub-Page Name	Status	
<input type="checkbox"/> Annual SummerFest Celebrations Begin	<input type="radio"/> Show <input checked="" type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Inclement Weather Closures	<input type="radio"/> Show <input type="radio"/> Hide from Menu <input checked="" type="radio"/> Hide All Content	
<input checked="" type="checkbox"/> New Regulations and You	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Fall Entertainment Schedule Released	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Winter Storm Clean-Up Update	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input checked="" type="checkbox"/> Water Monitoring Alert	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	

Archive The selected page(s) and its(their) sub-pages will be archived.

Close







When prompted, click **OK** to confirm that you wish to archive the selected pages.

Viewing Pages

From the Page Status page, you can view each of the listed pages by clicking the  icon.

Page Status

- **Show** will display the page in the menu
- **Hide from Menu** will hide the page from the menu
- **Hide All Content** will hide the page and any objects under the page

Sub-Page Name	Status	
<input type="checkbox"/> Annual SummerFest Celebrations Begin	<input type="radio"/> Show <input checked="" type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Inclement Weather Closures	<input type="radio"/> Show <input type="radio"/> Hide from Menu <input checked="" type="radio"/> Hide All Content	
<input type="checkbox"/> New Regulations and You	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Fall Entertainment Schedule Released	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Winter Storm Clean-Up Update	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	
<input type="checkbox"/> Water Monitoring Alert	<input checked="" type="radio"/> Show <input type="radio"/> Hide from Menu <input type="radio"/> Hide All Content	


Archive The selected page(s) and its(their) sub-pages will be archived.

Close

Archived Subpages

The **Archived Subpages** choice under **Page Options** displays any archived subpages of the current page. Here you have the ability to view, restore and delete these archived pages.

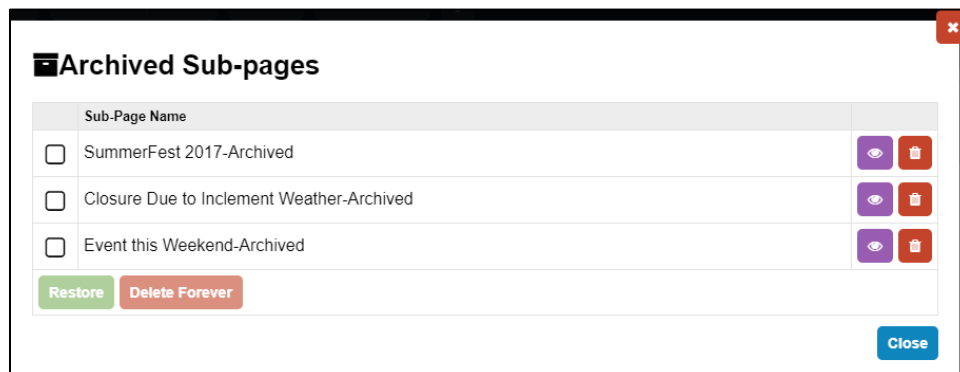
Viewing Archived Pages

To view an archived page, click the  icon next to the page you wish to view. The page will be displayed in a new tab.

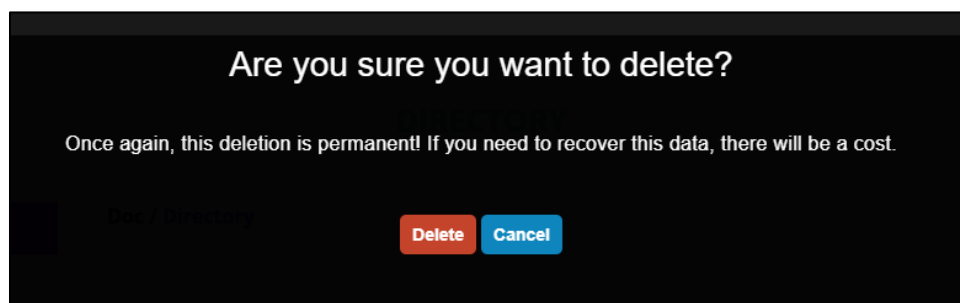
Deleting Archived Pages

In Presence, pages must be archived before they can be deleted. This two-step process ensures that pages are not deleted mistakenly. Deleted pages are lost permanently and may not be retrievable; therefore before a page is deleted it must first be archived. As there is no limit to the number of pages you can have archived on a site, we strongly urge you to not delete a page unless you are fully confident you will never need the page, or any the data contained on the page (or its subpages), again in the future.



To delete pages from the system, click the  icon next to the page you wish to delete.



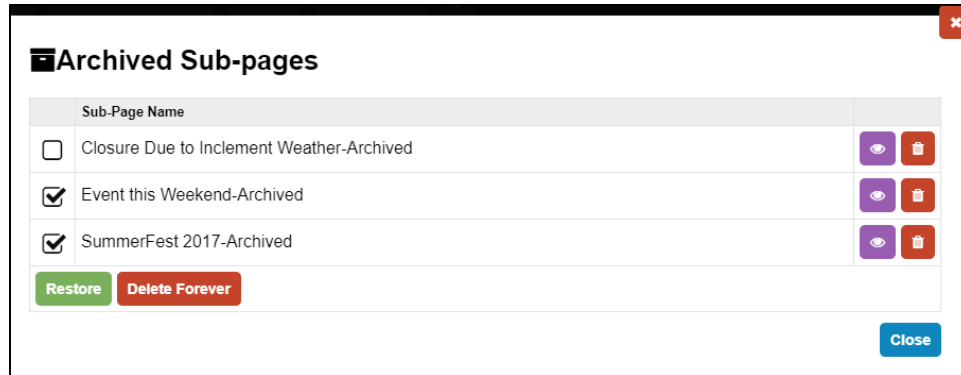
A prompt will appear asking you to confirm that you wish to permanently delete the page.



Click **Delete** to confirm that you wish to remove the page.

-  **Warning:** When you delete a page, all sub-pages will be deleted as well.
-  **Warning:** Once you delete a page, the only way it can be restored is restoring it from a back-up. The back-ups are run each night, so if the page was created the day it was deleted, it won't be possible to restore it. For pages that can be restored, there may be a cost to do so.

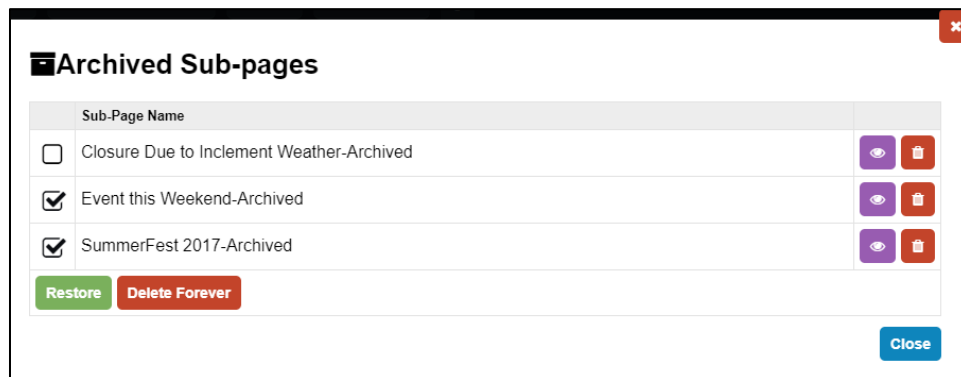
If you wish to delete multiple pages at once, place a check for each page you wish to delete.




Click **Delete Forever**.

Restoring Archived Pages

If you wish to retrieve an archived page, that is, if you wish to make it accessible to users on your website again, place a check for each page you wish to restore.



Click the **Restore** button.

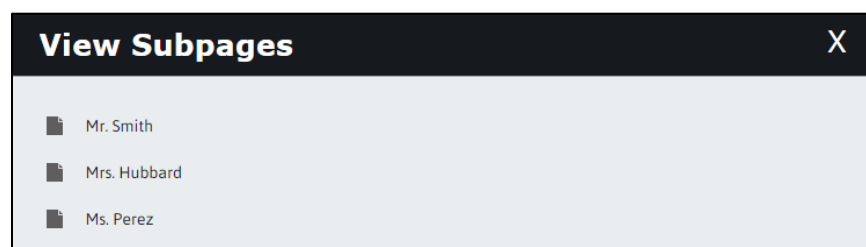
 **Note:** In the Presence system, pages must be archived before they can be deleted. This two-step process ensures that pages are not deleted mistakenly. Deleted pages are lost permanently and may not be retrievable.

Edit External Link Subpages

An **External Link Page** allows you to create links on your website that route to either an external website or a page within your current website or a document. Details on how to add and maintain an **External Link Page** have been included in the *External Link Page* manual.

View Subpages

This menu lists all the subpages, including hidden and not yet released pages, currently under the parent page. This menu allows content authors to easily access and edit hidden or unreleased pages.




Advanced Options

The **Advanced Options** menu is the third row of menus found on the *Administrative Toolbar*. This menu features the more complex tools of the system. Although intuitive enough to learn on your own, it is recommended that users first become familiar with the **Page Options** menu before delving in to the **Advanced Options** menu.

The options that are available in the **Advanced Options** menu vary according to your permissions on a site. Therefore, several features mentioned in this section will refer to the *Administrator Manual* and will not be detailed in this user guide.

Page Theme

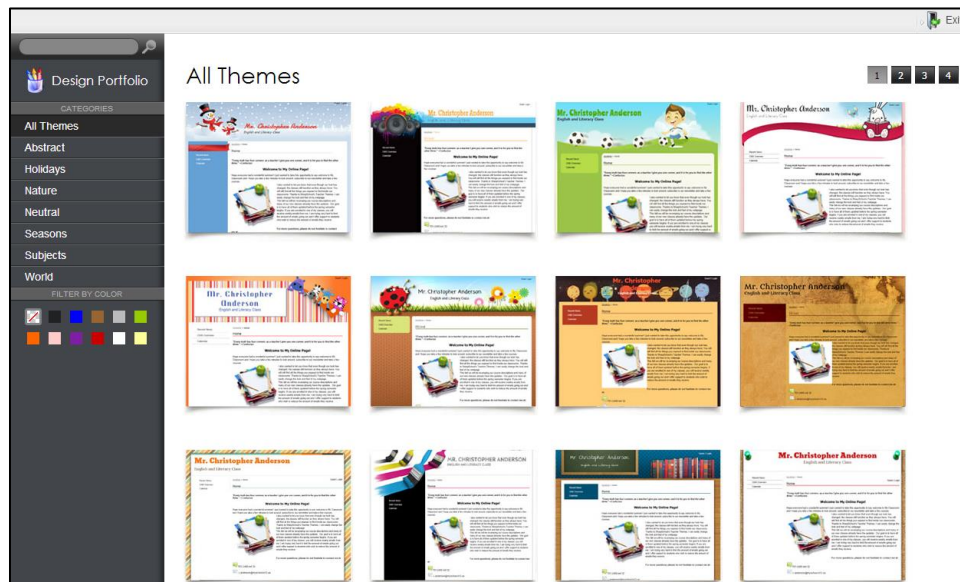
The Page Theme option can be a great way to give your page its own look and feel.

 **Note:** In order to set a page theme for a page, you must be the page owner or a member of the Administrators group.

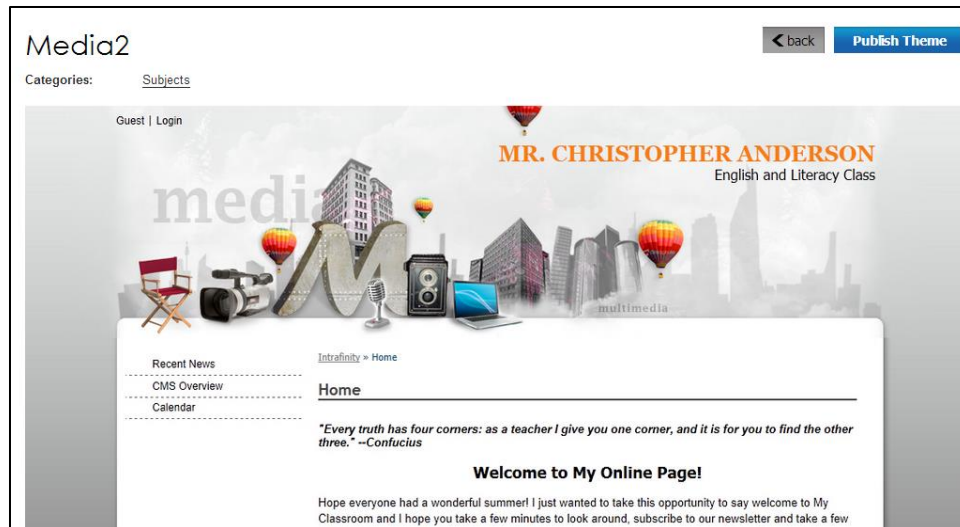
To set a page theme, go to the page you want to set and then click on **Advanced Options -> Page Theme**. You will now be brought to the Design Portfolio.

From here you have the option to browse through all of the themes. On the left side of the page you can help to narrow your search. You can use the search bar to search for a specific theme. You also have the option to view pages for specific categories such as Nature or Holidays or you can view themes that match a specific color by using **Filter By Color**.

Once you have found a page theme that you like, you can hover your mouse over the theme and click the **Preview** button to get a better idea of how the theme will look. If you are happy with the theme, click on the theme (but outside of the **Preview** button).



Click **Publish Theme** to confirm your selection.



Because of the way inheritance works, by default all subpages of this page will also bear this new theme. If you do not wish that to be the case, you will need to set the theme(s) on the subpages as well.

Once you have set your new page theme, you can also set a header for the page. To do so, go to **Metadata** under the **Page Properties** tab and select **General Metadata**. At or near the bottom of the window that comes up you will see two fields, **Header Line 1** and **Header Line 2**. Any text you type in these two fields will be made part of the header.

Once you have completed your change, click **Submit**, close the Metadata window and refresh your page to see the change. Any subpages that are inherited this theme will also inherit your new header.

Move Page

Only administrators have the ability to move pages. Therefore, a detailed description has been included in the *Presence Administrator Guide*.

Copy Page


Only administrators have the ability to copy pages. Therefore, a detailed description has been included in the *Presence Administrator Guide*.

Save as Page Type

After creating a page with a particular range of portlets, administrators have the ability to save it as a page type. This page type will then be available to all users on the system. This tool allows you to save the page you have open as a page type or template for use later on. Only administrators have the ability to create page types. Therefore, a detailed description on how to create and add custom page types has been included in the *Presence Administrator Manual*.

Manage Approval Process

Although the responsibility of maintaining pages may be distributed among different groups of users in an organization, pages of critical importance are often sent to an approver before being published on the website. Using the system's **Manage Approval Process**, changes made by a page owner are routed to a designated approver via email.


RULES							
The following is a list of the rules that must be completed on this item.							
Rule Name	Parties	Task	Logical Operation	Propagate To Children	Propagated From	Last Modified Time	Actions
<u>Test</u>	Bert.Tate	Approve	All	Yes		2013-01-24 09:57	

[ADD RULE](#) [DELETE ALL RULES ON CURRENT PAGE](#)

You must perform the following steps in order to initiate an approval:

Click on **Add Rule**.

In the following window **Name** the rule and define the **Parties** (i.e. the approvers) who will be approving the page.

Select the approving **Parties** by clicking on the **Choose User/Group**  button.

Select the **Logical Operation** that will apply to your Rule.

Require that ALL Party members approve current step to advance workflow indicates that all Parties that you enter in the step above must approve the change(s) made to the page.

Require that ANY single Party member approve current step to advance workflow allows any one that you add in the Parties to approve any change(s) made to the page.

The **Propagate rule to subpages** allows you to apply the rule on your subpages.

You have the option to include a **Description** of the approval workflow.

Click on **Create Rule**.

Excluding Pages


The Manage Approval Rules allows you to exclude particular child pages from being included in a rule.

Adding a Page to be excluded:

Click on the name of the rule from the Rules page.

Click on the **Add Page** button.

From the list click on **Select** beside the name of the page.

If you want to delete a page from the **Excluded Pages** list simply click on the  button beside the name of the page.





Multiple Approval Processes

You have the ability to create multiple approval rules on a page. This step allows changes to critical pages to be filtered through more than one user or group of users before being published on the website.

To add multiple approval processes simply create rules by clicking **Add Rule**.

Use the arrow keys   to move the order of rules.

To delete approval processes simply click on the  icon.

PAGE APPROVAL PROCESS							
RULES							
The following is a list of the rules that must be completed on this item.							
Rule Name	Parties	Task	Logical Operation	Propagate To Children	Propagated From	Last Modified Time	Actions
Test	Bert.Tate	Approve	All	Yes		2013-01-24 09:57	 
Design Approval	Alfred.Salazar	Approve	All	Yes		2013-04-19 12:16	 

[Close](#)

Propagating Page Approvals to Subpages

Administrators have the ability to take a single rule and push it to all **subpages** underneath a page. To do so, simply check off the **Propagate rule to subpages** option. This will allow you to set up approval rules to cover a whole section.

How to Approve or Reject Pages

There are several ways in which an approver can approve or reject pages.

When a page owner attempts to publish a page that already has a page approval rule applied to it, it will trigger an email to be sent to the approver(s). This email contains a link to the page that requires approval and here the approver can click on the link and approve the page online.

Approvers also have the ability to view all their outstanding approvals throughout the system. We will cover this feature in detail under the Tasks section of this user guide.

View Local Portlets

Only administrators have the ability to *View Local Portlets*. Therefore, a detailed description has been included in the *Presence Administrator Manual*.

Tools

The Tools menu comes fourth in the row of menus in the *Administrative Toolbar*. This menu is considered the housekeeping component of the solution and offers useful reminders and information on maintaining your pages.

Check Links


Often, page owners on websites have no easy way of verifying when a hyperlink link is broken. The **Check Links** option allows users on the Presence system to check whether links on the site are working properly. This tool produces a table of all the links on a page and the corresponding status of each link (i.e. whether or not it is valid). Clicking on a link will take you to its target destination.

Checked-Out Page Report



The Checked-Out Page report provides a list of pages that have been checked out and have not been checked in. You can search for pages Checked-out longer than a certain number of days, search for pages checked-out by a specific user, or you can search for all checked-out pages on the site. Once you have set your specifications, to see the report, click **View Report**. You can export the report by selecting Select a format from the drop down menu and then click **Export**. To view the page that is checked out, simply click on the **Page Name**. You will also see who the page is **Checked Out By** and the date and time the page has been **Checked Out Since**. **This report is only available to administrators.**

REPORT PARAMETERS

Checked-out Longer Than (days):

Checked Out By: 

View Report

1 of 1 Find | Next  

Checked-Out Pages

Page Name	Checked Out By	Checked Out Since
Activities	matthew.goody	22 April, 2013 04:42 PM
Home	trevor.mackay	18 April, 2013 04:38 PM
Mr. Rice	Brian.Rice	05 April, 2013 12:48 PM
Test	adrian.lo	03 April, 2013 09:25 AM
Photo Gallery	Delbert.Foster	02 April, 2013 02:43 PM

Expiring Content Report

The **Expiring Content** report provides a list of pages that are expiring. That is, pages that are or were visible and that have set to be hidden after a certain date (via the release schedule). You can search by pages **Expiring** in certain number of days, **Page Owner**, and to see the entire report click **View Report**. You can export the report by selecting Select a format from the drop down menu and then click **Export**. To view the page that is expiring, simply click on the **Page Name**. You will also see who the **Page Owner** is and the **Expiry Date**.

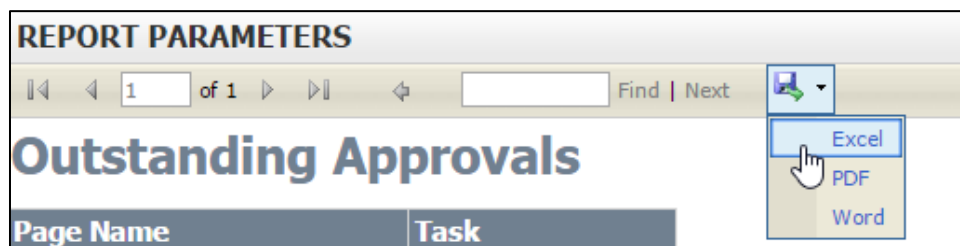
Outstanding Approval Report

In the *Manage Approval Process* section, we cover how to apply approval workflows to pages on your site. The premise of approval workflows is to route changes made by a content author to designated individual(s) or groups who will then be responsible to approve or reject those changes.

Notifications of pages pending approval are sent to the approver via email. However, the **Outstanding Approval Report** serves as an extension to the emails and offers the approver a list of all the pages in one comprehensive location. Approvers have the ability to click on the title of the page directly from the report and approve or reject the changes. **This report is only available to administrators.**

Export the Approval Report

Users have the ability to export the approval reports for their site. This tool is often used by administrators to keep track of how often pages are pending approval.



To export information simple click on the drop down menu and select the format of the exported document (Excel, PDF or Word) and click on **Export**. This will open the exported document in the format you selected.

Stale Content Report

The **Stale Content Report** ties into the **Follow-up Tasks** feature we covered under the **Page Properties** section. If you recall, this is where users have the ability to set up scheduled reminders on their pages. **This report is only available to administrators.**

In addition to sending an email reminder, the system also tabulates all pages that missed their review date under the **Stale Content Report**. This ensures that even if page owners are unable to update their pages on a specific date, administrators can still easily track which pages have been updated or reviewed and which have not.

Using the Stale Content Report

This report contains a table with key information about pages on your system:

Page Name: This column lists the name of the specific page that missed its review date. These titles are clickable; therefore page owners can directly access the page and make content changes to it.

Page Owner: This column shows the page owner who missed the review date. For administrators, this column will show the review status of all the page owners on the system.

Follow-up Task: This column defines the task that was assigned to the specific page.

Follow-up Date: This column displays the date the follow-up task was scheduled to be completed.

Publish Status: This column displays the current publish status for the page.

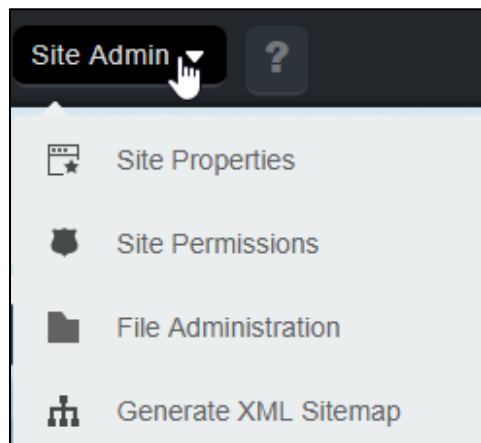
Export Information

Users have the ability to export the **Stale Content Reports** for their site. This tool is often used by administrators to keep track of how often pages on a site are updated.

To export information, click on the drop-down to select the format of the exported document (Excel, PDF or Word) and click on **Export**. This will open the exported document in the format you selected.

Site Administration

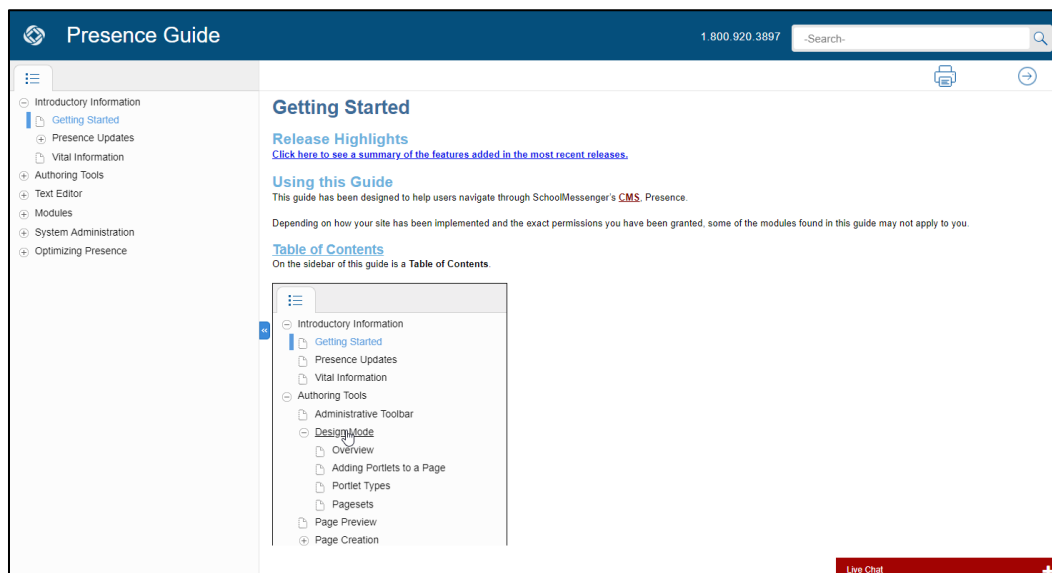
The site administration tasks, such as **Site Properties** and **File Administration**, can be found by hovering over **Site Admin** and choosing the option you wish to access.



These options are generally only available to administrators and will be detailed in the *Presence Administrator Guide*.

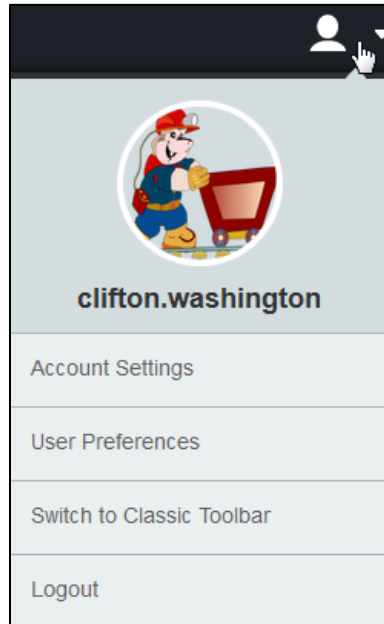
Getting Help

If you click on **?** in the menu, a new tab will open. Within this tab, you will find extensive information on Presence as well as the option to contact support by phone or chat.



Updating Profile Information

On the right side of the toolbar, if you hover over  you can change your **Account Settings** and **User Preferences**.





The **Account Settings** option in the User Menu allows you to update your user information in a number of tabs.

User Account

The **User Account** tab allows you to view **Username**, **First Name** and **Last Name**. You can also view and update your **Email Address** and **Password**. If you change your password, you will need to enter the password into the **Password** and **Re-enter Password** fields.

USER DETAILS	
Fields marked with an asterisk (*) are mandatory.	
Username	<input type="text" value="bert.tate"/> *
First Name	<input type="text" value="Bert"/> *
Last Name	<input type="text" value="Tate"/> *
Email Address	<input type="text" value="bert.tate@anexampleemaildomain.example"/> *
Password	<input type="password"/> * (Leave blank to keep the old password)
Re-enter Password	<input type="password"/>
<input type="button" value="Update User"/> <input type="button" value="Cancel"/>	

 **Note:** Depending on your site's configuration and how your user account was created, you may not be able to update the email address or password through the Presence site.

 **Note:** Depending on your site's configuration and how your user account was created, you may see two additional fields for **Secret Question** and **Secret Answer**. Filling these out will allow you to reset your password in the future.

After making any changes to your **User Details**, click **Update User**.

User Profile

The **User Profile** tab allows you to fill in additional information about your account, such as your **Job Title**, your **Website** or your **Facebook** account.

Telephone Numbers		
Work	<input type="text" value="555-888-2618"/>	<input type="checkbox"/> Keep Private
Mobile	<input type="text"/>	<input type="checkbox"/> Keep Private
Home	<input type="text"/>	<input type="checkbox"/> Keep Private
Fax	<input type="text"/>	<input type="checkbox"/> Keep Private
Pager	<input type="text"/>	<input type="checkbox"/> Keep Private

User Photo

The **User Photo** tab allows you to set a photo for your user account. This photo will appear in the User Menu and on the [Staff Directory](#) portlet.

To set or update a photo, click **Choose File**.

USER PHOTO
<p>To upload a new profile picture, select an image by clicking the Browse button and click the Upload button to upload the selected image.</p> <p>The image must be a jpg, gif, png, or bmp with file size less than 10MB.</p>
<input type="button" value="Choose File"/> My Profile.png
<input type="button" value="Upload"/>

Select your photo and then click **Upload** to set the photo as your profile image.

Preferences

The **Preferences** tab shows a number of options. However most of these options should be left on their default setting (**Use Server Default**). The only setting that you might want to change is the **Time Zone**.

If you are in a different time zone than the site itself, you can specify your time zone by clicking the **Time Zone** drop-down and choose your desired time zone. This will be used when creating calendar events, setting release schedules, etc.

USER PREFERENCES	
Preferred Theme	Use Server Default ▼
Preferred Locale	Use Server Default ▼
Date Input Format	Use Server Default ▼
Time Zone	Use Server Default ▼
Header Navigation	Text Only ▼
	<input type="checkbox"/> Show Help
	<input type="checkbox"/> Show Context Bar
Look and Feel	
Small Icon Sizes	Use Server Default ▼
Medium Icon Sizes	Use Server Default ▼
Large Icon Sizes	Use Server Default ▼
<input type="button" value="Restore Server Defaults"/> <input type="button" value="Update Preferences"/> <input type="button" value="Cancel"/>	

After setting the time zone, click **Update Preferences**.