



# **COD10 User Guide**

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## Introduction

WebMD Ignite has aligned with Crownpeak as its exclusive healthcare web technology partner to create the latest version of CMS. CMS was built leveraging the best of Crownpeak's capabilities with WebMD Ignite's innovation.

The Crownpeak tool has been built with the marketer in mind, which makes editing in CMS intuitive and easy. You can edit pages in a familiar browser mode without actually leaving the page. Most importantly, your marketing team and content editors will no longer be dependent on IT or web development support for simple site revisions. You are the editor, no coding required.

However, if you prefer markup or style language, the editing tools are just as intuitive and convenient.

***CMS is designed with the marketer in mind. No coding required.***

## Disclaimer

The screen samples included in this document may vary from those you see in your software, based on configuration options selected. Samples are included to serve as a guide and training tool and are not intended to represent actual replicas of screens in your software. Any patient names used in this documentation are fictitious.

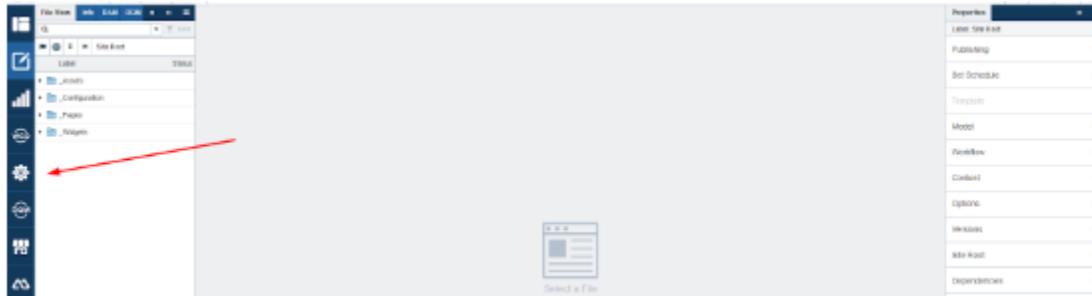


# Administrative

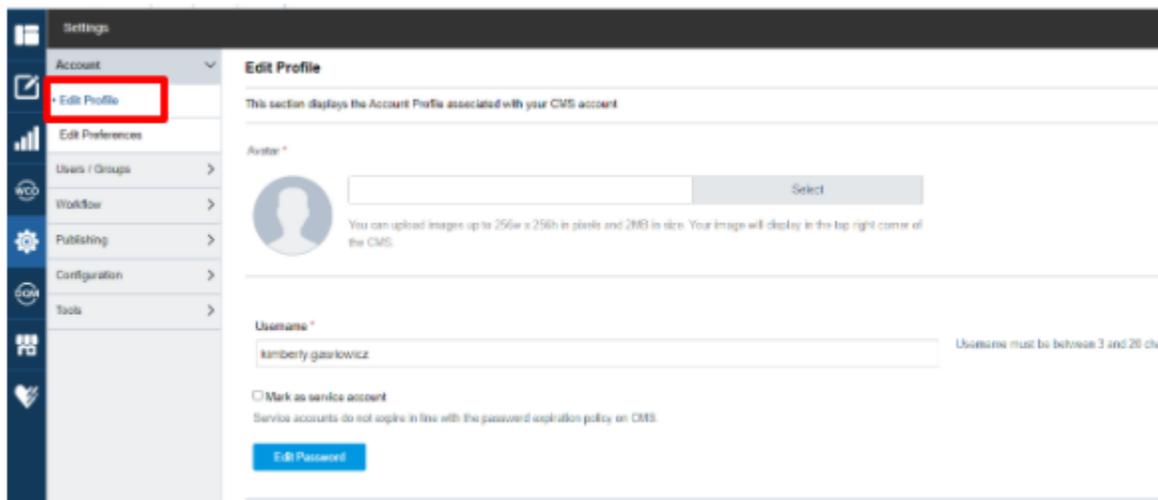
## Edit your profile and preferences

### Edit profile

From the main left navigation menu, navigate to **Settings** (gear icon) for configuration options.



Select **Edit Profile** to edit your profile.



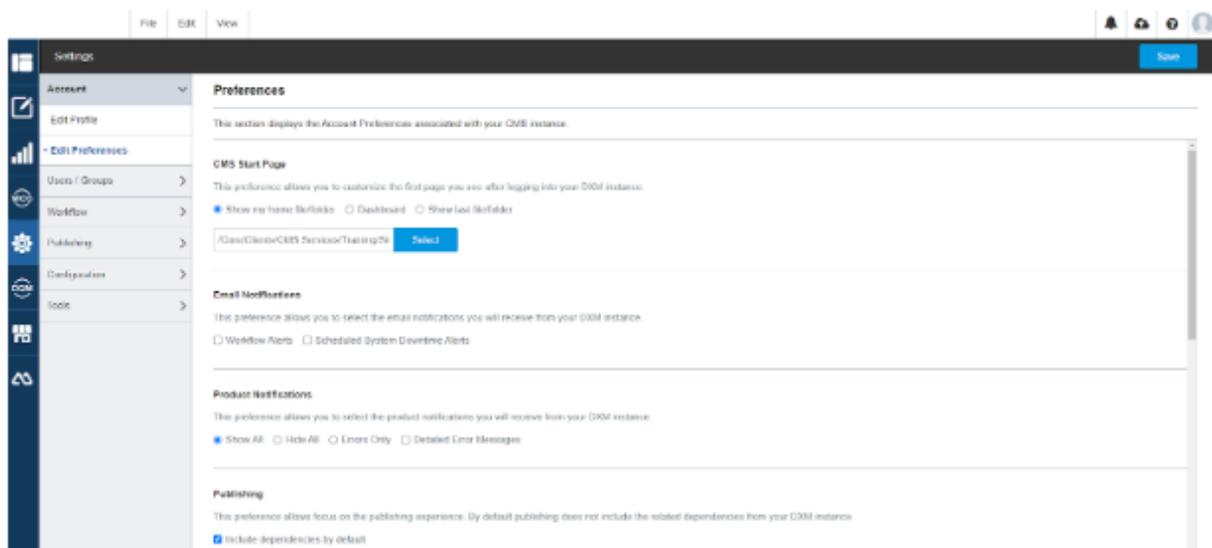
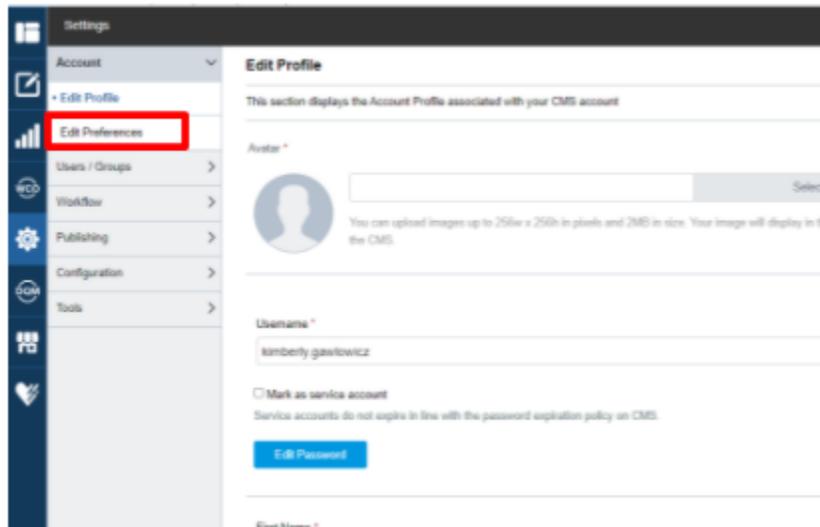
Some of the things you can do here:

- Select an avatar/image
- Set username
- Set password to never expire (check 'Mark as service account')
- Change password
- Define user attributes
- Select Login option
- Associate groups

### Edit preferences

Also from the main left navigation menu, navigate to Settings for configuration options. Select **Edit Preferences** to edit your preferences.





Some of the things you can do here:

- Customize the first page you see after logging into the CMS (CMS start page).
- Control notifications
- Publishing preferences
- Content preview states
- Content debug options
- Set timezone and language preferences
- Initial view when opening an asset

### CMS Start Page

- This preference allows you to customize the first page you see after logging into the CMS.
- For example, as configured in the image below, the system will automatically navigate to the Site Root folder when you log in.



## CMS Start Page

This preference allows you to customize the first page you see after logging into your DXM instance.

- Show my home file/folder
  Dashboard
  Show last file/folder

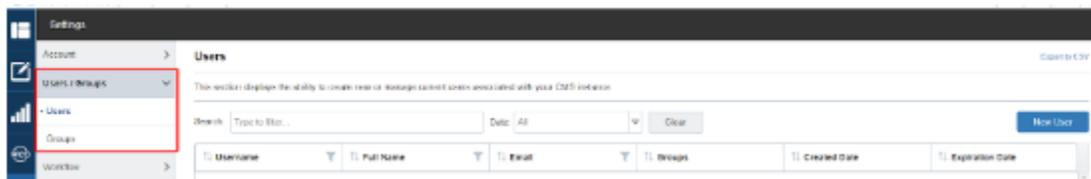
/Core/Clients/CMS Services/Training/Site Root/

Select

## User management

From the main left navigation menu, navigate to **Settings** for configuration options.

Select **Users/Groups** to edit your users.



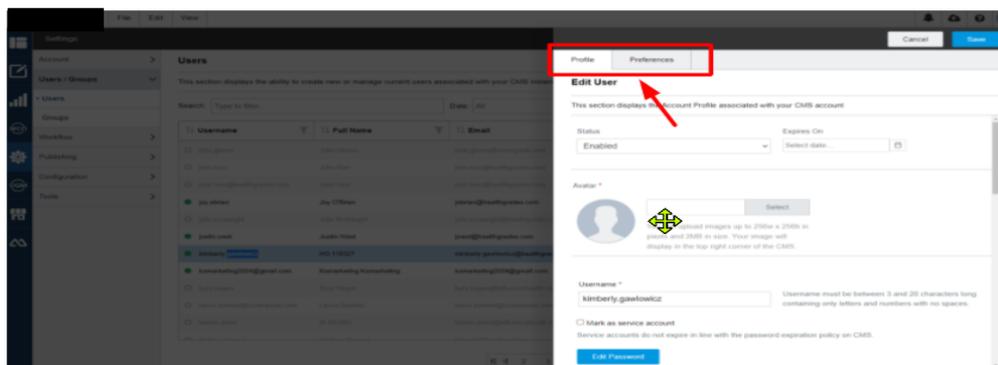
## Users

This section allows you to create new or manage current users associated with your CMS instance.

- To set up a new user, click the **New User** button and fill out the required fields.



- To edit an existing user, double-click a user's name and edit **Profile** or **Preferences** using the tabs as shown below.



- Use this section to reset a user's password.



## Groups

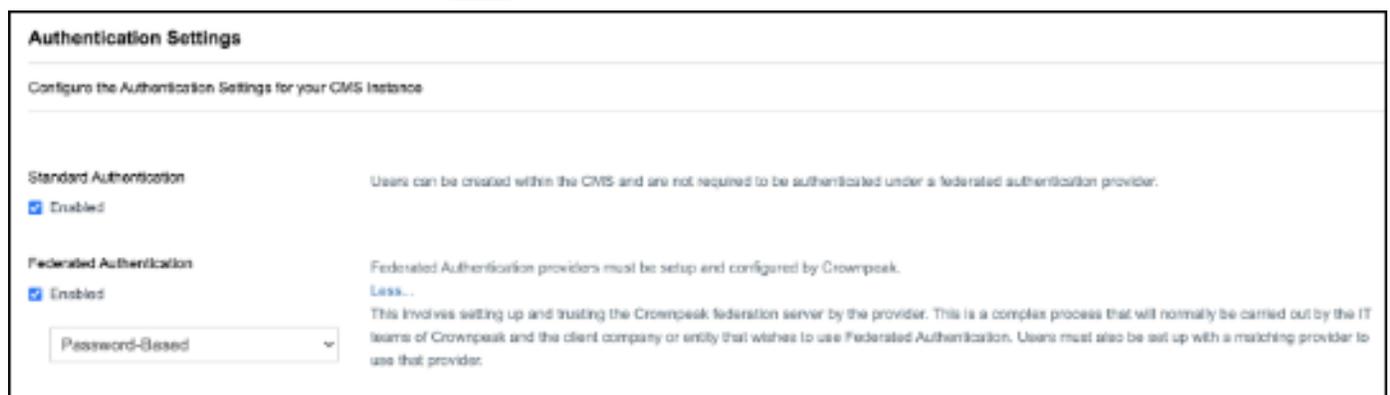
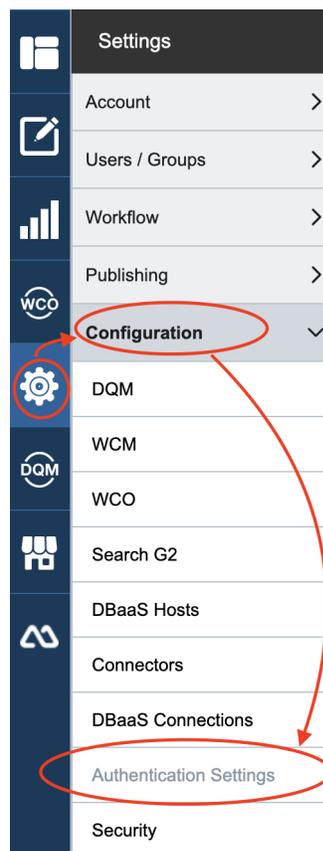
This section allows you to create new or manage current Groups associated with your CMS instance.

- To set up a new group, click the **New Group** button.
- To edit an existing group, click the user group name and follow the prompts.

## Configuring site for SSO via SAML/LDAP

For clients with single sign on (SSO) availability such as SAML/LDAP, the CMS can be configured to add users in a way that they can leverage this functionality. If you want to set up SSO for your website login, you will need to have your WebMD Ignite contact set up a conversation with your IT and the WebMD Ignite and Crownpeak teams.

Authentication settings can be found by clicking the **Gear icon > Configuration > Authentication**.



Specific information your IT team will need to have available during that call includes:

### SAML Identity Provider (IdP) (Section)

- Single Sign On URL (The identity provider URL to which SAML requests should be sent.)
- Issuer ID (Enter the Issuer ID of the identity provider.)
- Signing Certificate (Enter the public certificate of the identity provider.)
- Upload (Click this button to upload the configured information.)
- Remove (Click this button to remove the uploaded information.)

### SAML Attribute Names (Section)

Security Assertion Markup Language (SAML) open standard is the link between the authentication of a user's identity and the authorization to use a service. SAML allows identity providers (IdP) to pass authorization credentials to service providers (SP).

- Login (Enter the Attribute Name (Claim Type) that identifies the user's login name.)
- Email (Enter the Attribute Name (Claim Type) that identifies the user's email address.)
- First name (Enter the first name of the person.)
- Middle name (Enter the middle name of the person, if applicable.)
- Last name (Enter the last name of the person.)
- Groups (Enter groups as applicable.)

### SAML Service Provider (SP) (Section)

- Single Sign On URL (Also known as the ACS URL. Enter the URL where SAML assertion responses from the Identity Provider should be sent.)
- Audience URL (Enter the intended audience URL of SAML assertions. Also represents the Service Provider.)
- Default Return URL (Enter the default URL to which the user should return following successful authentication.)

## Adding new SSO users

Once SSO has been configured on your site, you can easily add new users via your existing SSO. Click the **gear icon** to access the **Users** panel. Then click **New User**.

The screenshot shows the 'Users' management interface. On the left sidebar, the 'Users / Groups' menu item is circled in red. A red arrow points from the 'New User' button in the top right corner of the main content area to the 'Users / Groups' menu item. The main content area displays a table of users with the following columns: Username, Full Name, Email, Groups, Created Date, and Expiration Date. The table contains several rows of user data, including 'access.api', 'afraz.nizam@crowpeak.com', 'alan.chan@crowpeak.com', 'alex.haughton', 'alex.magnuson', 'ambre.chapman', and 'anil.peddi'.



Add the user's SSO username into the **Username** field, which must be supplied to you by the user or your IT. Make sure to click **On Save, Randomly Generate a One-Time User Password**.

Complete all the other remaining fields as you would for any normal user. The only exception is that you'll need to toggle the **Standard Login Option** under **Login Provider** to your SSO login option.

## Workflow management

From the main left navigation menu, under **Settings**, Workflow provides configuration options for the following categories:

- Workflows
- Workflow Filters

Select **Workflow** to access your workflows.

Workflow Name	Description	Color Code	Count	Last Modified	Owner
IH Production Workflow	Production Workflow	[Colorful bar]	12236	Feb 5, 2021, 5:10:22...	Brandon Douds
IH Dev Workflow	Development Workflow	[Colorful bar]	374	Oct 13, 2016, 11:06...	
IH Full Workflow	Full workflow supporting all 4 states	[Colorful bar]	0	Mar 6, 2016, 7:05:39...	
IH Instant Publish	Assets that should be published to all environments insta...	[Colorful bar]	5	Jul 8, 2019, 2:14:09...	IH 031505
IH QA Workflow	Testing Workflow	[Colorful bar]	245	Sep 29, 2016, 12:02...	
IH Site Builder Import	IH Site Builder Workflow	[Colorful bar]	13	May 24, 2017, 3:21:1...	Alex Houghton
Backup of IH Dev Workflow	Development Workflow	[Colorful bar]	0	Sep 22, 2016, 9:04:1...	
IH Stage Workflow	Stage Workflow	[Colorful bar]	364	Oct 26, 2016, 4:25:5...	
Upgrade Handler	Responsible for triggering the execution of custom upgra...	[Colorful bar]	1	Apr 26, 2017, 9:02:4...	
Release Workflow	Workflow for republishing site and microsites	[Colorful bar]	2	Dec 16, 2019, 10:48...	Richard Lund
Simple Double Publish	Stage to Pending then Live	[Colorful bar]	0	Sep 30, 2021, 5:59:0...	IH 031635



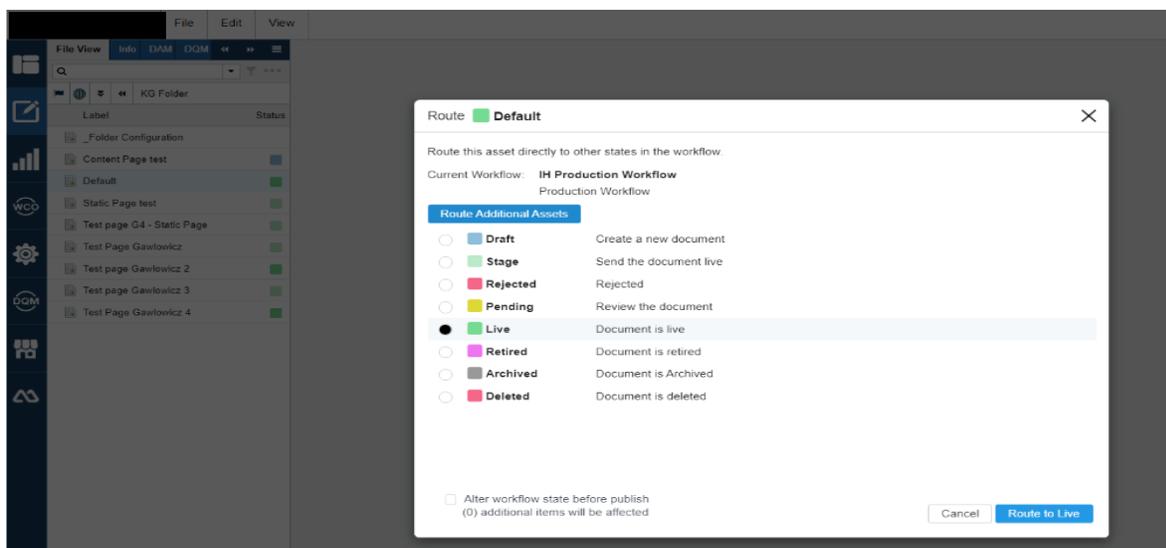
## About Workflows

A Workflow describes a predefined lifecycle that can be applied to an asset (object, image, document, or video) within the CMS.

The CMS allows you to set up as many Workflows as needed to support your business needs. This is typically set up by a WebMD Ignite developer on your behalf and is rarely modified after.

The process of creating a Workflow involves defining automated steps that are invoked by configurable actions such as triggers, filters, user interactions and/or conditions. These automated steps that follow a configured action are called 'transitions'. As an asset travels the Workflow path, the asset 'transitions' from one state to another.

To see the Workflow of an existing asset, right click **asset/file**, then click **Route**. The options displayed represent that asset's workflow. For example, in the screenshot below, you can see this file follows the 'IH Production Workflow' and the states beginning with Draft thru Deleted are the stages of that Workflow.



## Workflow examples

Some examples of how Workflows can be used are listed below by their description. These examples are mostly custom built by WebMD Ignite's developers, at your request, but most commonly used ones are available out-of-the-box.

- Assets that should be published to all environments instantly upon creation
- Builds sitemap data in a Sitemap JSON file for consumption by sitemap files
- Development Workflow
- Full Workflow
- Microsite Workflow
- Normal page Workflow
- Production with Dev state
- Production Workflow
- Responsible for triggering the execution of custom upgrade actions
- QA Sanitizer Workflow

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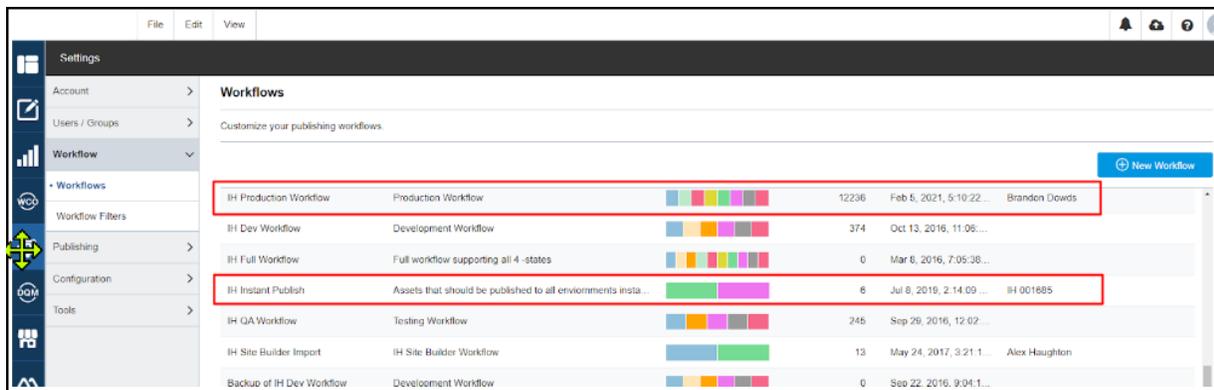


- Short workflow for shared assets
- Simple workflow - draft > live
- Site Builder Workflow
- Stage Workflow
- Testing Workflow
- The workflow the task management system uses
- This workflow allows only one doc to be live at a time so for the home page, you can schedule the live date.

## Workflows out-of-the-box

While there are many examples of workflows, as listed above, there are only 2 commonly used workflows used in the CMS today. Both are available out-of-the-box.

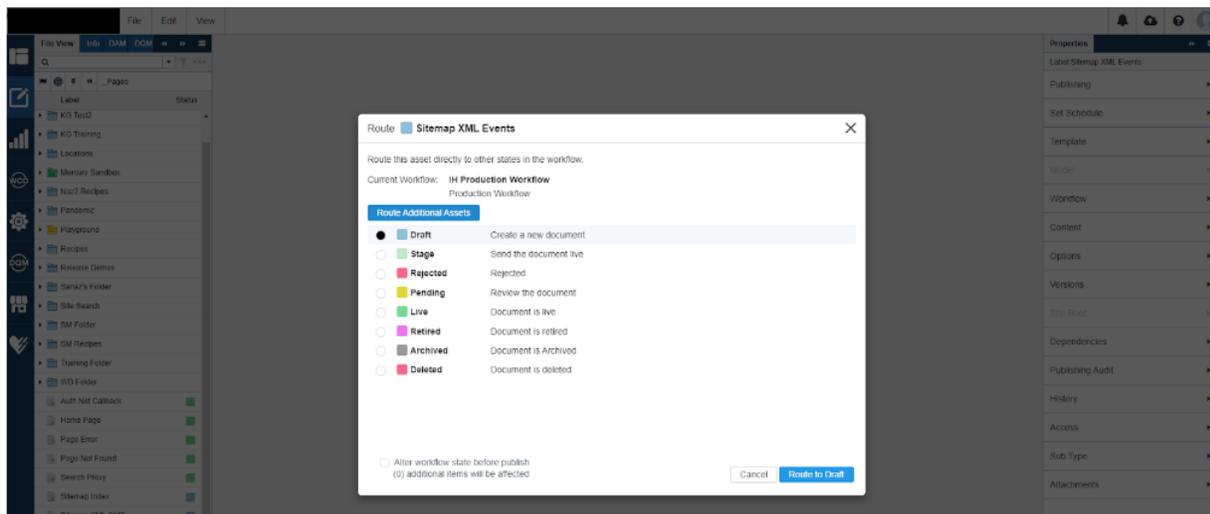
- IH Production Workflow
- IH Instant Publish



Workflow Name	Description	Asset Count	Last Modified	Owner
IH Production Workflow	Production Workflow	12236	Feb 5, 2021, 5:10:22...	Brandon Dowds
IH Dev Workflow	Development Workflow	374	Oct 13, 2016, 11:06:...	
IH Full Workflow	Full workflow supporting all 4 -states	0	Mar 6, 2016, 7:05:38...	
IH Instant Publish	Assets that should be published to all environments instia...	6	Jul 6, 2016, 2:14:09...	IH 001885
IH QA Workflow	Testing Workflow	245	Sep 29, 2016, 12:02:...	
IH Site Builder Import	IH Site Builder Workflow	13	May 24, 2017, 3:21:1...	Alex Haughton
Backup of IH Dev Workflow	Development Workflow	0	See 22, 2016, 9:04:1...	

## IH Production Workflow

- Most assets follow this workflow.
- In this workflow, an asset begins in the **Draft** state. It can then transition to the **Stage** state and finally, once published, transition to a **Live** state.
- There are several other states in this workflow as shown below.



## Instant Publish

In some cases, we want to publish assets to Live instantly, without requiring the asset to be manually routed through Stage. The purpose of this workflow is to ensure these types of assets are published everywhere as soon as they are created.

The most common use for this workflow is for images used for Providers, Locations and Events within Content Apps. Content Apps, by design, instantly publish to Live; therefore, the images must also be instantly available when created. To achieve this, we associate this workflow with the folder **\_Assets/Images/ih**. This folder houses all the images created by the Content Apps section for those modules.

For example, when we are in the Providers section of Content Apps and upload a physician photo, Content Apps places that image in the 'ih' folder. Since IH Instant Publish is associated with that entire folder, the image is instantly published to Live and the entire physician record is immediately published to Live.

## Creating new workflow vs editing existing workflow

While both options are available, it is often easiest to begin with an existing workflow and modify it to create the desired workflow.

The Workflow settings are the same for both creating a new workflow or editing an existing workflow. Those settings are described below.

***It is strongly recommended that you contact a WebMD Ignite developer to assist in creating or editing workflows.***

## Workflow settings

To access workflow settings:

- From the main left navigation menu, navigate to **Settings** (gear icon)
- Select **Workflows** on the left nav to access your existing workflows.
- From here you can
  - Create a new workflow (Click **New Workflow** button on top right) OR

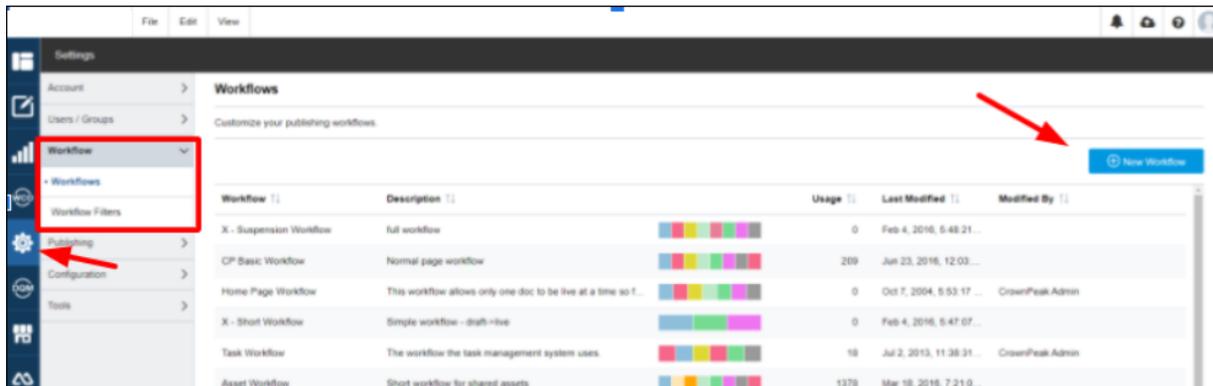
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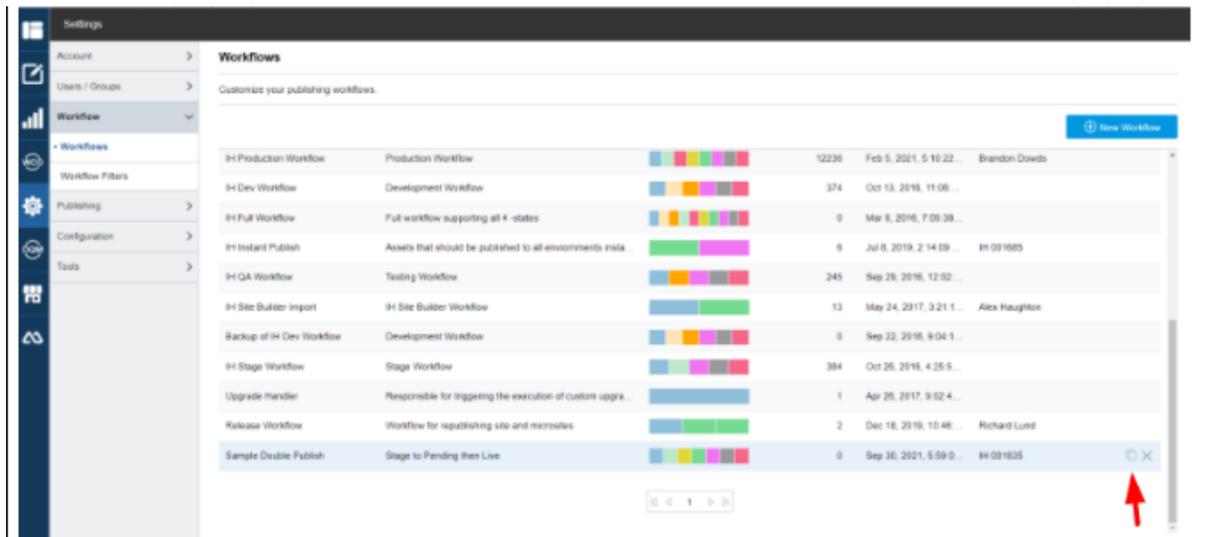
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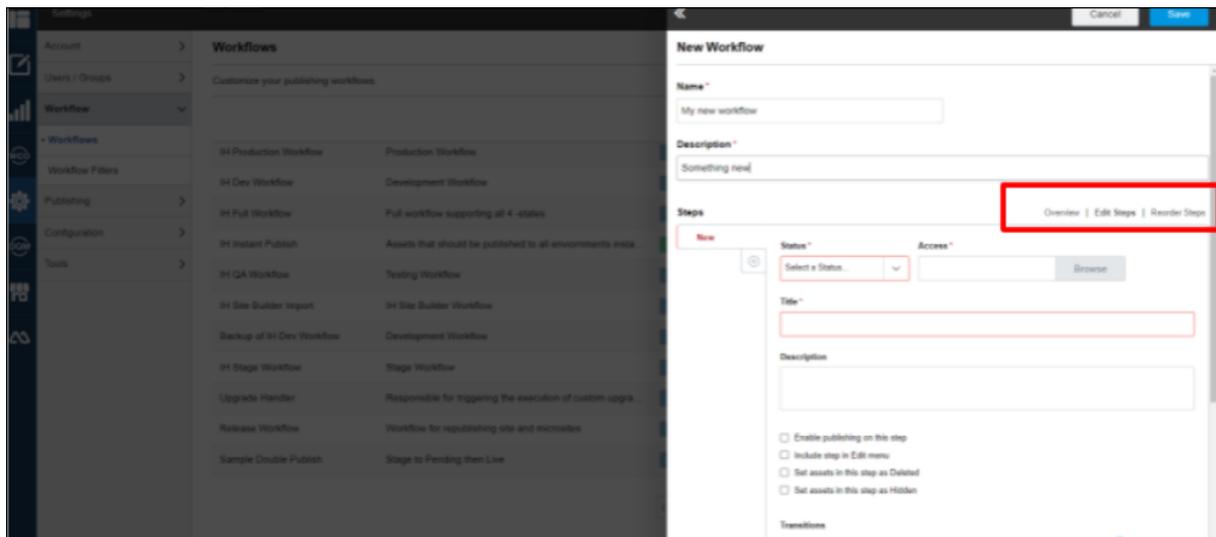
- Edit an existing workflow (Click workflow to be edited to open edit menu) OR
- Clone and existing workflow and edit it to create a new workflow



To copy and edit an existing workflow, click an existing workflow that is similar to what you want. Select Clone on the far right (as shown below) which will create a copy of the workflow. Then click the cloned version of the workflow, which will open the Edit Workflow window.



After clicking the **New Workflow** button, or cloning an existing workflow, notice there are 3 clickable panels available as shown in the screenshot below:



All 3 panels are available for both New Workflow and Edit Workflow

- **Overview** - allows you to change the workflow
- **Edit Steps** - allows you to make changes to each step in the workflow.
- **Reorder Steps** - allows you to change the order of the steps within the workflow.

When creating a new workflow, it will open first to the **Edit Steps** panel.

When editing an existing workflow, it will open first to the **Overview** panel.

### Creating a new workflow

The general process for creating a new workflow is enter

1. Name : Enter a name for the workflow
2. Description : Describe the workflow
3. Create all the Steps of the workflow first
4. Then configure each step in the workflow which includes Transitions and other settings, as desired (Note: We do it this way because transitions can not be defined until the step we are transitioning to is defined within the new workflow.)

### Overview panel

The overview panel allows you to change the workflow





### Edit Steps panel

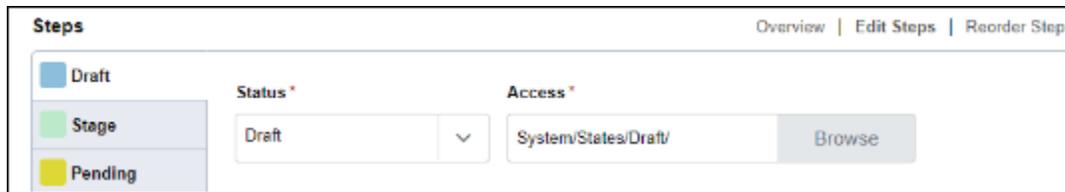
The Edit Steps panel allows you to make changes to each step in the workflow.

There are many options here within the Edit Steps panel to customize your workflow. Each workflow state/step includes the following:

- **Status\*** (This is a required field, as indicated by the asterisk (\*). Displays the selected status. Options available from the drop-down field include: Draft, Pending, Rejected, Stage, Suspended, Live, Retired, Archived, Deleted, Not Started, In Progress, Parking Lot, Deferred,

Completed, Closed, Approved, QA, Dev, Sanitize Failure, Sanitize Success, Sanitize and Add New Status.)

- **Access\*** (Required. The Browse button takes you to the **System/States** folder. Generally you will select the system state that matches the 'Status' you selected in the previous step. See example below.



- **Title\*** (This is a required field. You can edit the title of this workflow state.)
- **Description** (Enter a concise description for your workflow state, to help users understand its intended use.)

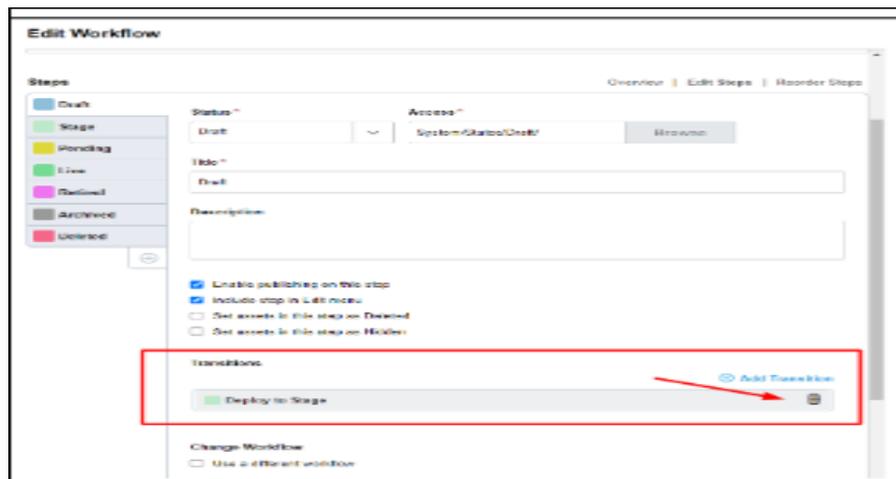
Enable or deactivate the following options using the applicable checkbox:

- Enable publishing on this step.
- Include steps in the Edit menu.
- Set assets in this step as Deleted.
- Set assets in this step as Hidden.

## Transitions

Configure transitions for this state.

- **Add Transition** (Click this button to add a new Transition panel.). See example below.



These transitions may be deleted and new ones added.

- **Deploy to Stage** example above(Expand this panel to customize behaviors that apply to this transition.)

Inside each transition are configurable behaviors and filters including the following:

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- **Transition Trigger** (Options are User Command, Action and Schedule. Select a trigger. The submenus change in context with your selection. Configure additional rules from the contextual options that display. Our sample screen below displays User Command.)

For example, a selection of User Command offers the following options:

- **When a user selects...\*** (Required. Enter the UI selection that initiates the next step. For example: Deploy to Stage.)
- **...Go to Step\*** (Required. Choose from the list of options Draft, Stage, Pending, Live, Retired, Archived, Deleted. For example, we chose Stage.)
- **Uses Workflow Filter** (Choose a workflow filter from the list. In this example, options are; None, Developer Filter and Editor Approval.)

Enable or deactivate the following options using the applicable checkbox.

- Include action in user's workflow tasks in their summary page.
- Include Action **in edit** page as a blue button.
- Prompt user with, "Are you sure?" before executing.
- Request a comment before going to the next step.
- Queue publishing **in destination** step.
- Enforce an edit/save before transition.
- Enforce a **spell check** before transition.
- **Enforce a set** schedule before transition.
- Delete Transition (Click this button to delete this transition.)

Transitions ⊕ Add Transition

Deploy to Stage
🔒

**Transition Trigger**

User Command
▼

**When a user selects...\*** **...Go to Step\***

Deploy to Stage
▼

Stage
▼

**Uses Workflow Filter**

None
▼

Include action in user's workflow tasks in their summary page.

Include Action in edit page as a blue button.

Prompt user with 'Are you sure?' before executing

Request a comment before going to the next step

Queue publishing in destination step

Enforce an edit/save before transition

Enforce a spellcheck before transition

Enforce set schedule before transition

⊖ Delete Transition

## Change workflow

Below the **Transitions** section, you can opt to change the workflow. Enable/deactivate using the following checkbox.

- **Use a different workflow** (Enable/deactivate using this checkbox.)

When enabled, this checkbox displays additional options for using a different workflow.

- **Select Workflow** (This drop-down contains all of your previously-configured workflows)
- **Select a Status** (This drop-down contains **Routing** statuses such as the following: Draft, Pending, Rejected, Stage, Suspended, Live, Retired, Archived, Deleted, Not Started, In Progress, Parking Lot, Deferred, Completed, Closed, Approved, QA, Dev, Sanitize Failure, Sanitize Success and Sanitize.)

## DQM

Enable this to use DQM findings to prevent publishing.

## Execute File

Select a template file to execute. (Select the new Document\_Sanitizer.aspx template file, which will execute on transition to this state, using the Browse button.)

## Email Notification

Send selected users an email notification when an asset reaches this step. Enable/deactivate this option using this checkbox. If enabled, this area expands to allow additional setup by Users and/or Groups, based on USER ID in the system.

## Delete This Step

Remove the entire step using this control.

## Reorder Steps panel

The Reorder Steps panel allows you to change the order of the steps within the workflow.

## Document Sanitization Workflow

### Overview

To meet National Institute of Standards and Technology (NIST) requirements, the HG CMS application sanitizes all downloadable Adobe PDF and MS Office® files of metadata containing Personally Identifiable Information (PII).

**Note: It does not remove any PII within the content of those documents.**

Personally-Identifiable Information includes any data that could potentially be used to identify a specific person, that includes, but is not limited to employee ID names and numbers, or email addresses that may reside in a document's properties and header.

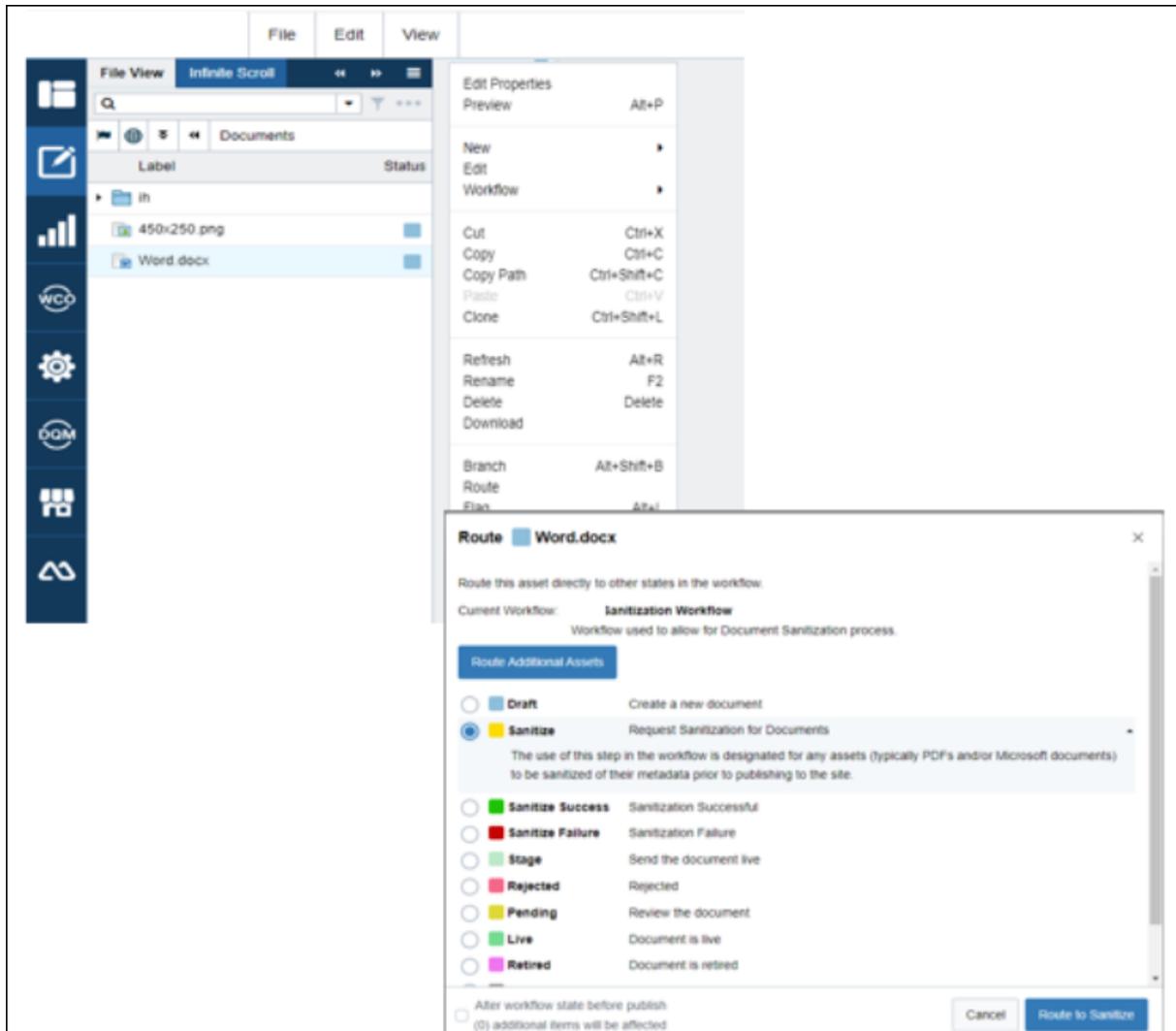
The sanitization process removes all of this metadata from uploaded PDF files, Word (.docx), Excel (.xlsx) and PowerPoint (.pptx) files, eliminating the need for manual removal of PII prior to upload and greatly reducing the potential for error.

The process workflow is configurable, with additional sanitization options. You can additionally configure **Author** and editor comments to be removed from documents.

**Supported MS Office® documents include the open-xml version only and do not include older versions such as .doc .xls or .ppt, etc.**

Documents are stored in the **Assets** folder. From **Content**, this is usually under a path similar to ..Site Root/\_Pages/\_Assets.

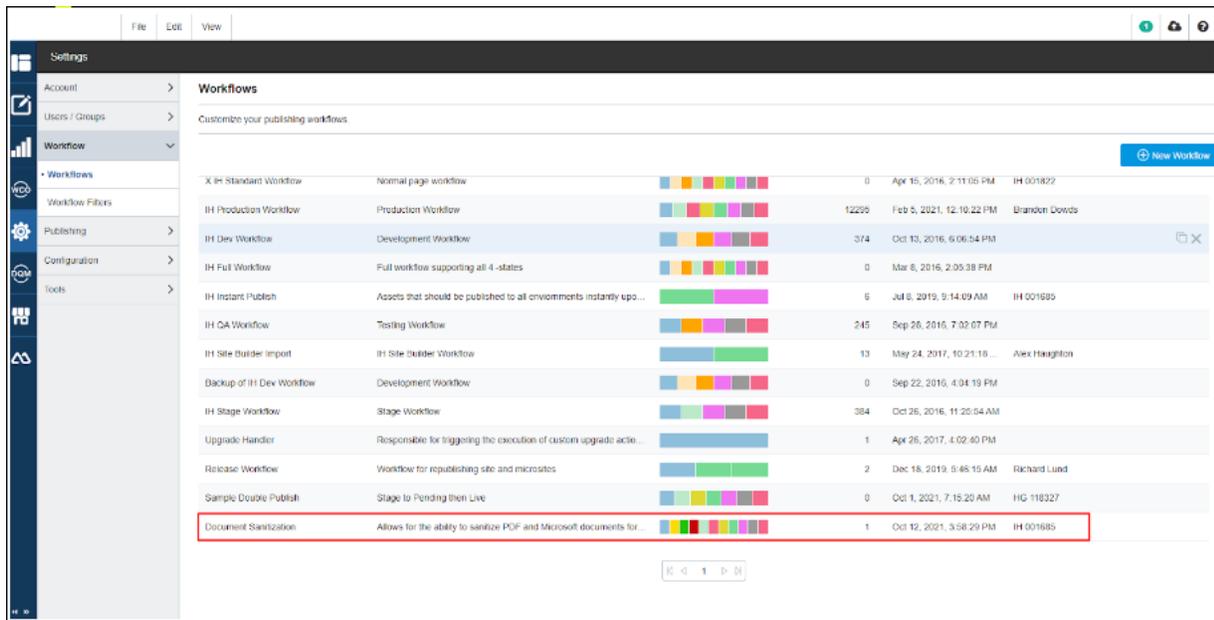
You can **Route** documents from here to a sanitization state. Sanitization states are fully customizable from the **Settings > Workflow** area. Follow the steps in [Create a New Workflow](#) if this option does not exist.



Use the following documentation as a guide to setting up a **Documentation Sanitization Workflow**. As stated earlier, it is recommended to involve WebMD Ignite’s developers when setting up any new workflow.

## Workflow settings for Document Sanitization

Access Workflow from **Settings** in the main left menu bar. You can create a new workflow here from the **New Workflow** button or edit an existing workflow.



Workflow Name	Description	States	Count	Last Modified	Created By
X.IH Standard Workflow	Normal page workflow	[Color bars]	0	Apr 15, 2016, 2:11:05 PM	IH 001822
IH Production Workflow	Production Workflow	[Color bars]	12295	Feb 5, 2021, 12:10:22 PM	Brandon Dowds
IH Dev Workflow	Development Workflow	[Color bars]	374	Oct 13, 2016, 6:06:54 PM	
IH Full Workflow	Full workflow supporting all 4-states	[Color bars]	0	Mar 8, 2016, 2:05:38 PM	
IH Instant Publish	Assets that should be published to all environments instantly up...	[Color bars]	6	Jul 6, 2019, 9:14:09 AM	IH 001885
IH QA Workflow	Testing Workflow	[Color bars]	245	Sep 26, 2016, 7:02:07 PM	
IH Site Builder import	IH Site Builder Workflow	[Color bars]	13	May 24, 2017, 10:21:16 ...	Alex Haughton
Backup of IH Dev Workflow	Development Workflow	[Color bars]	0	Sep 22, 2016, 4:04:19 PM	
IH Stage Workflow	Stage Workflow	[Color bars]	384	Oct 26, 2016, 11:26:54 AM	
Upgrade Handler	Responsible for triggering the execution of custom upgrade actio...	[Color bars]	1	Apr 26, 2017, 4:02:40 PM	
Release Workflow	Workflow for republishing site and microsites	[Color bars]	2	Dec 18, 2019, 9:45:15 AM	Richard Lund
Sample Double Publish	Stage to Pending then Live	[Color bars]	0	Oct 1, 2021, 7:15:20 AM	HG-118327
Document Sanitization	Allows for the ability to sanitize PDF and Microsoft documents for...	[Color bars]	1	Oct 12, 2021, 3:58:29 PM	IH 001885

The **Edit Workflow** screen displays. The vertical bars of the workflow, labeled by workflow state, are the currently configured states. Below are their definitions.

### Workflow states

- **Draft** (When a document is uploaded, it automatically arrives in the Draft state. Documents in this state are awaiting sanitization.)
- **Sanitize** (Although configurable, it is strongly recommended to use this workflow state. Documents must enter this workflow state in order to be sanitized.)
- **Sanitize Success** (Configurable. Documents automatically transition to this state when the sanitization succeeds.)
- **Sanitize Failure** (Configurable. Documents automatically transition to this state when the sanitization fails.)
- **Live** (Configurable. This is the environment to which our document will be published on Sanitize Success. In production, this would be Stage or Live.)

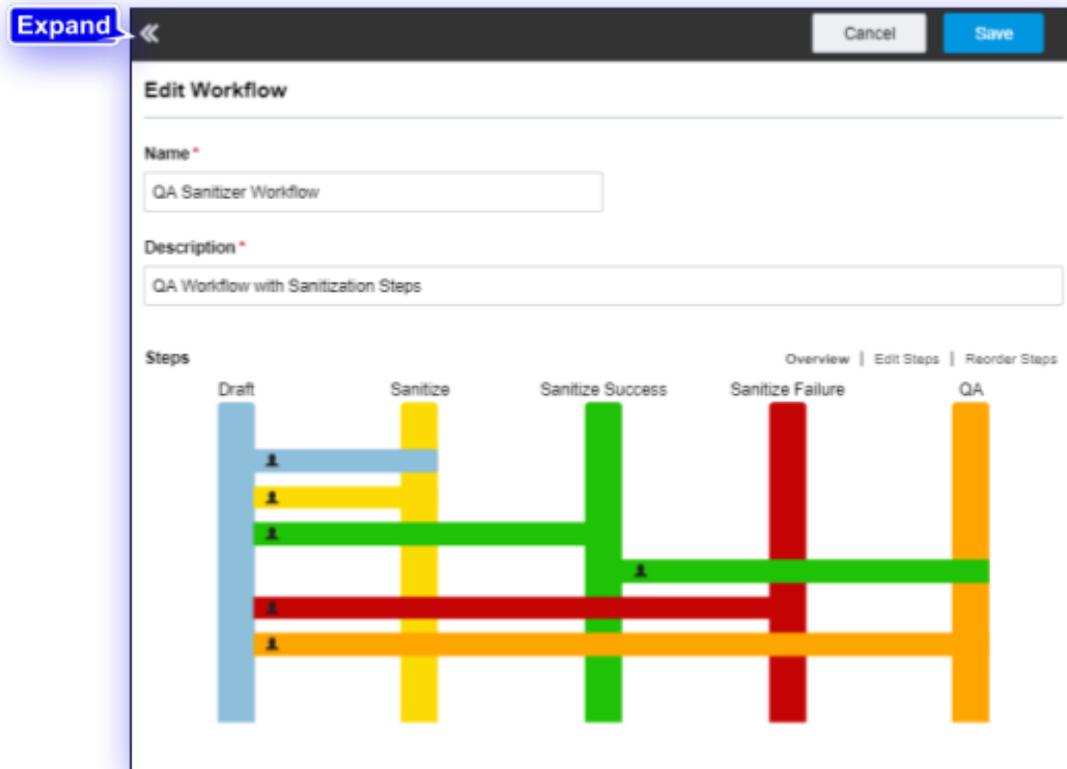
**The workflow state to which a document transitions on sanitization success or failure is configurable.**

### Editing workflow

You can configure **Workflow** to suit your business needs. For example, you can have the document sanitization start immediately upon upload, and when the sanitization succeeds, have the document transition to Sanitization Success or straight to Live or Stage.

**Content Apps** has a Scheduled Task that runs continuously in the background looking for document assets in need of sanitization. This process is detailed further in The **Document Sanitizer Task – Scheduled Tasks** topic.

From **Edit Workflow**, click on a vertical color bar to open the edit screen for that workflow state. You can expand your view using the arrows as shown.



### Edit workflow steps

We clicked the **Sanitize Success** workflow state, which opens the **Edit Workflow** screen, depicted below. There are many options here to customize your workflow. Each workflow state includes the following:

**Status\*** (This is a required field, as indicated by the asterisk (\*). Displays the selected status (currently Sanitize Success). Other options are available from the drop-down field and include: Draft, Pending, Rejected, Stage, Suspended, Live, QA, Dev, Sanitize Failure, Sanitize Success, Sanitize and Add New Status.)

- **Access\*** (Required. The Browse button takes you to the System/States folder. The displayed selection is System/States/Sanitize Success/.)
- **Title\*** (This is a required field. You can edit the title of this workflow state.)
- **Description** (Enter a concise description for your workflow state, to help users understand its intended use.)

Enable or deactivate the following options using the applicable checkbox:

- Enable publishing on this step.
- Include step in Edit menu.
- Set assets in this step as Deleted.
- Set assets in this step as Hidden.

### Transitions

Configure transitions for this state. We have used Draft and QA for our workflow demonstration.

- **Add Transition** (Click this button to add a new Transition panel.)

These transitions may be deleted and new ones added.

- **Draft** (Expand this panel to customize behaviors that apply to this transition.)
- **QA** (Expand this panel to customize behaviors that apply to this transition.)

The configurable behaviors and filters for this section are the same and include the following:

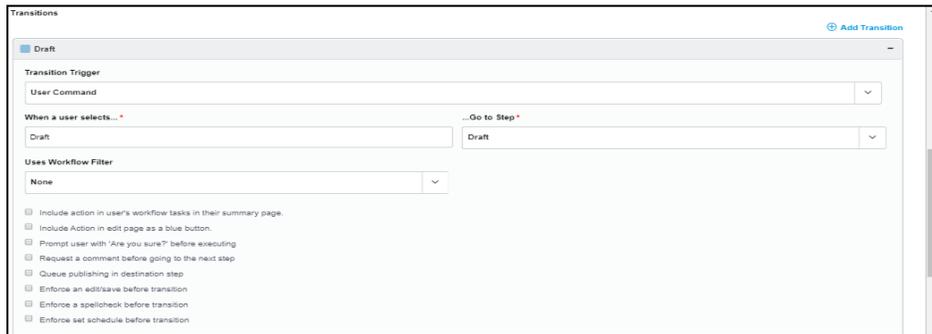
- **Transition Trigger** (Options are User Command, Action and Schedule. Select a trigger. The submenus change in context with your selection. Configure additional rules from the contextual options that display. Our sample screen below displays User Command.

For example, a selection of User Command offers the following options:

- **When a user selects...\*** (Required. Enter the UI selection that initiates the next step. For example: Draft.)
- **...Go to Step\*** (Required. Choose from the list of options Draft, Sanitize, Sanitize Success, Sanitize Failure or QA.)
- **Uses Workflow Filter** (Choose a workflow filter from the list. In this example, options are; None, Developer Filter and Editor Approval.)

Enable or deactivate the following options using the applicable checkbox.

- Include action in user's workflow tasks in their summary page.
- Include Action in edit page as a blue button.
- Prompt user with, "Are you sure?" before executing.
- Request a comment before going to the next step.
- Queue publishing in destination step.
- Enforce an edit/save before transition.
- Enforce a spellcheck before transition.
- Enforce set schedule before transition.
- Delete Transition (Click this button to delete this transition.)



## Change workflow

Below the **Transitions** section, you can opt to change the workflow. Enable/deactivate using the following checkbox.

- **Use a different workflow (Enable/deactivate using this checkbox.)**

When enabled, this checkbox displays additional options for using a different workflow.

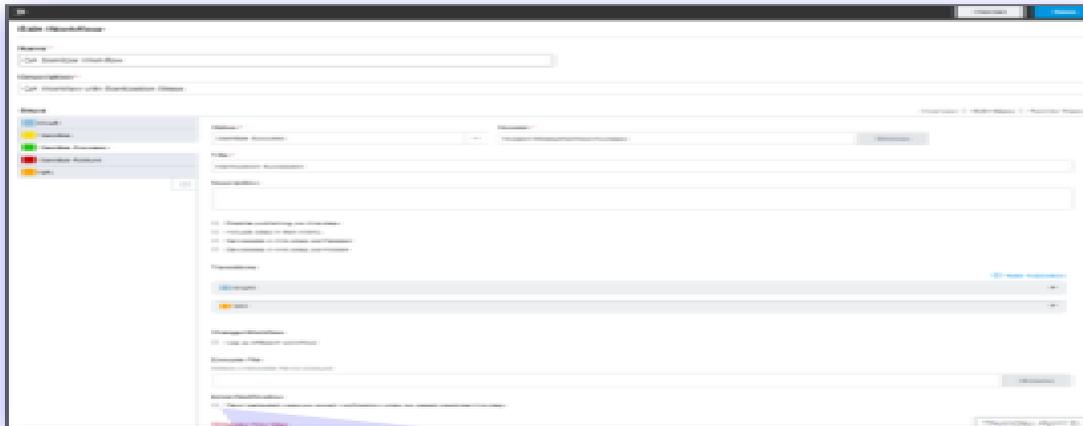
- **Select Workflow** (This drop-down contains all of your previously-configured workflows, including our example: QA Sanitizer Workflow.)
- **Select a Status** (This drop-down contains **Routing** statuses such as the following: Draft, Pending, Rejected, Stage, Suspended, Live, Retired, Archived, Deleted, Not Started, In Progress, Parking Lot, Deferred, Completed, Closed, Approved, QA, Dev, Sanitize Failure, Sanitize Success and Sanitize.)

## Execute file

- **Select a template file to execute.** (Select the new Document\_Sanitizer.aspx template file, which will execute on transition to this state, using the Browse button.)

## Email notification

- **Send selected users an email notification when an asset reaches this step.** (Enable/deactivate this option using this checkbox. If enabled, this area expands to allow additional setup by Users and/or Groups, based on USER ID in the system.)
- **Delete This Step.** (Enable/deactivate using this control.)

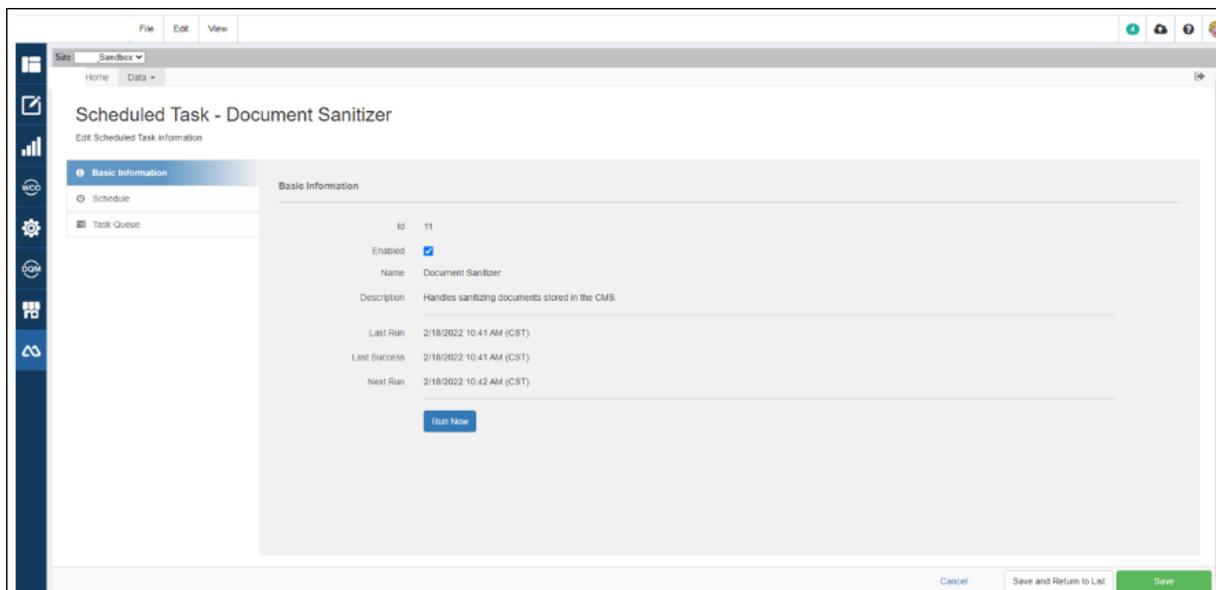


### The Document Sanitizer Task – Scheduled Tasks

**Content Apps > Configuration > Scheduled Tasks** now includes a scheduled **Document Sanitizer** task. Enablement and scheduling for this task is configurable.

### Basic Information Tab

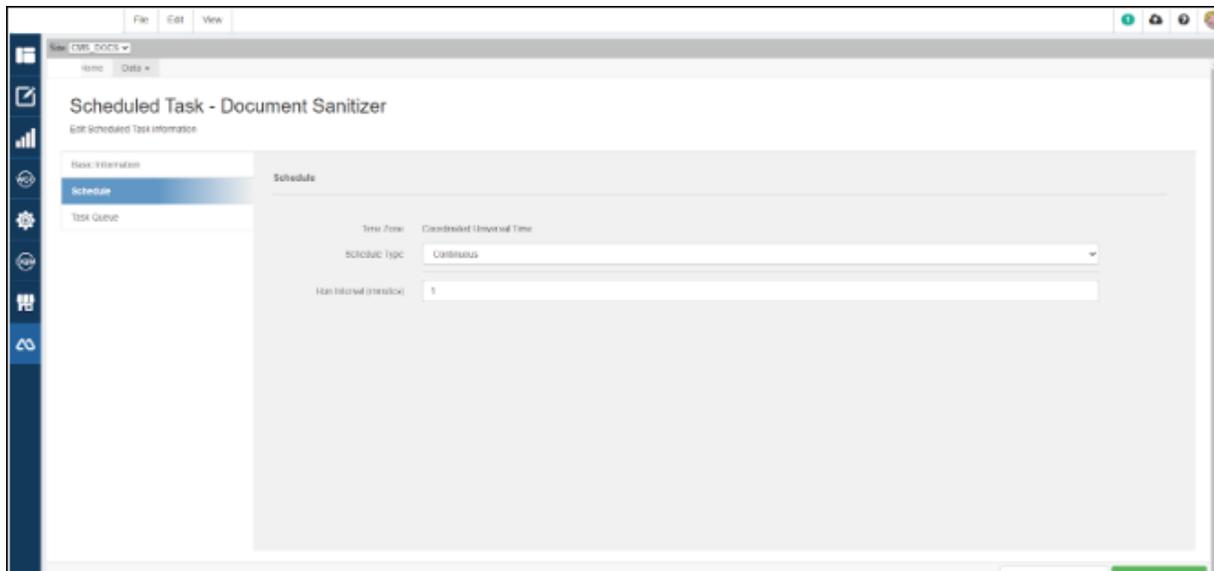
From the edit screen, the left **Basic Configuration** tab displays the current settings and status of the last run. Activate this task with the **Enable** checkbox.



## Schedule Tab

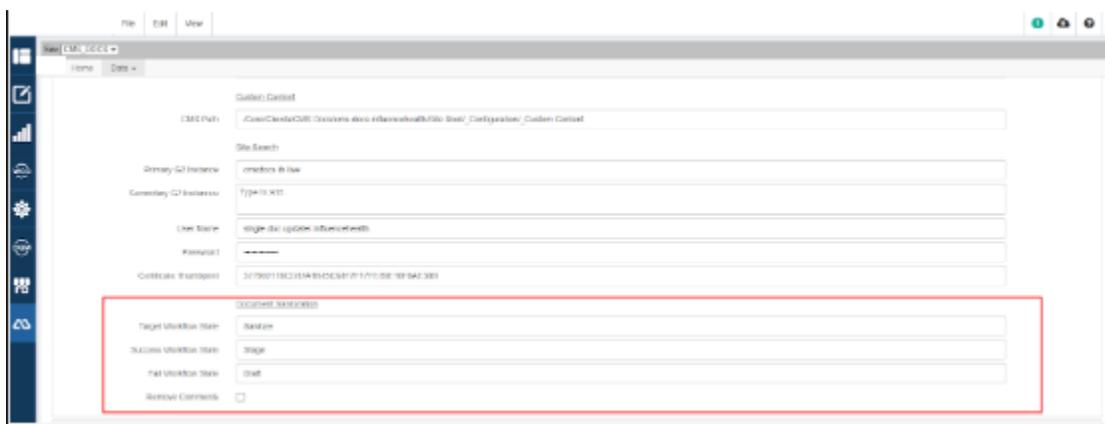
The next tab down on the left in the **Scheduled Task** [Task] edit screen is the **Schedule** tab. Configuration options are as follows:

- Time Zone (This field is display only. Our example displays: Central Daylight Time. You can select your time zone from the Time Zone Settings panel in Configuration > System Settings.)
- Schedule Type (Select from the available options, whether Continuous, Daily, Weekly, Monthly, Day of Month, Time of Day.)
- Time of Day (Enter the time of day you want this task to run in hours (format: hh) and minutes (format: mm). The AM/PM button toggles on click.)



## System Settings – Document Sanitization

There is a new Document Sanitization section in the **CMS Integration Settings** panel that allows you to control target, success and fail workflow states as well as to enable or deactivate the removal of reviewer comments from documents. Access these settings from **Content Apps > System Settings**. Expand the CMS Integration Settings panel and scroll down to the Document Sanitization section.



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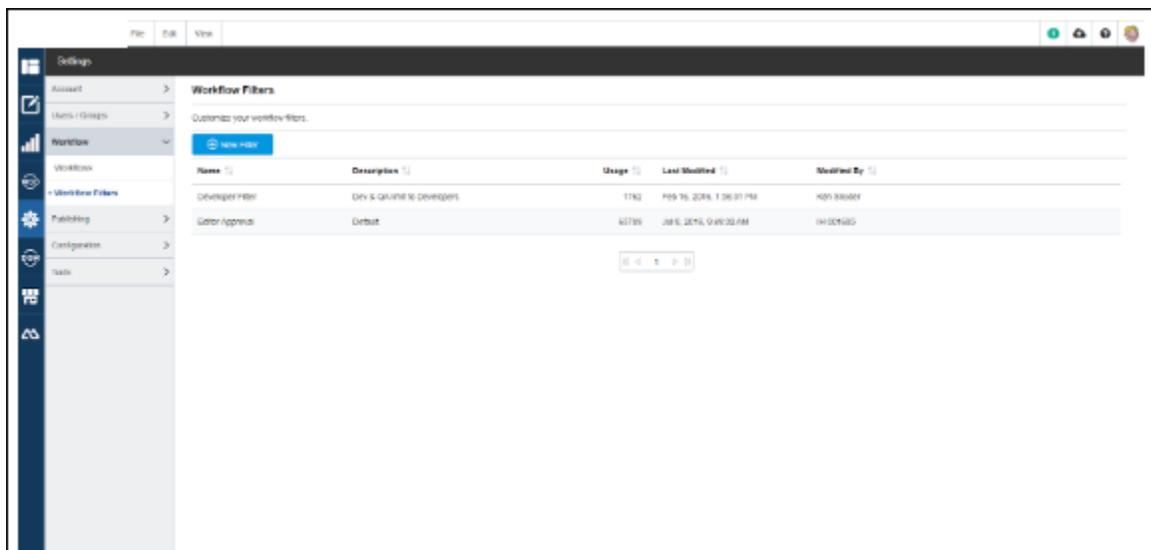
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Enter information in the fields as follows:

- **Target Workflow State** (The displayed value is Sanitize. This is the state that activates the sanitization process. Documents must be in this state in order to be sanitized.)
- **Success Workflow State** (Enter the name of the workflow state to which the document should transition on sanitization success. For example, Live.)
- **Fail Workflow State** (Enter the name of the workflow state to which the document should transition on sanitization failure. For example, Draft.)
- **Remove Comments** (Enable/deactivate the removal of reviewer comments from documents using this checkbox.)

## Workflow filters

Filters can redirect assets even from within the same workflow, based on the conditions you set, down to the field level. Add new or delete existing filters with the controls illustrated below.

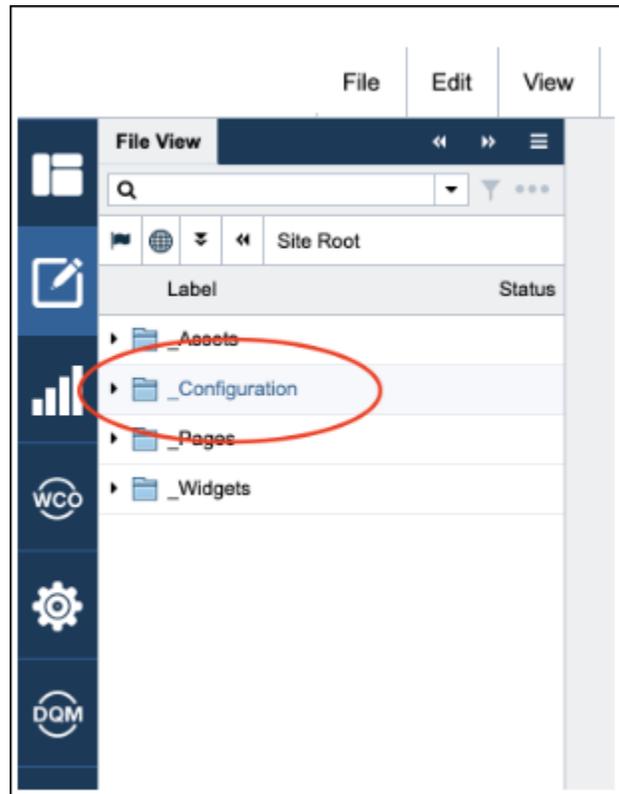


## Configuration

The **Configuration** for your COD10 site is where you will create custom content types, set up redirects, edit your navigation settings (main, footer, etc.), and make other major site-level configuration changes.

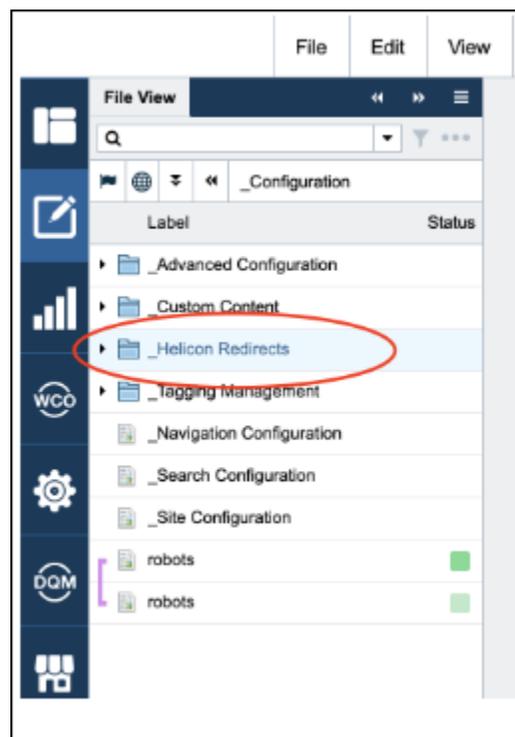
Please note that you will see folders for **Advanced Configuration** and **Tagging Management** in your Configuration folder, but you will never need to access these. The main tasks you'll need to accomplish in the site configuration are outlined below with appropriate processes.

To access your **Site Configuration** options, click **Configuration** in your **Site Root**.



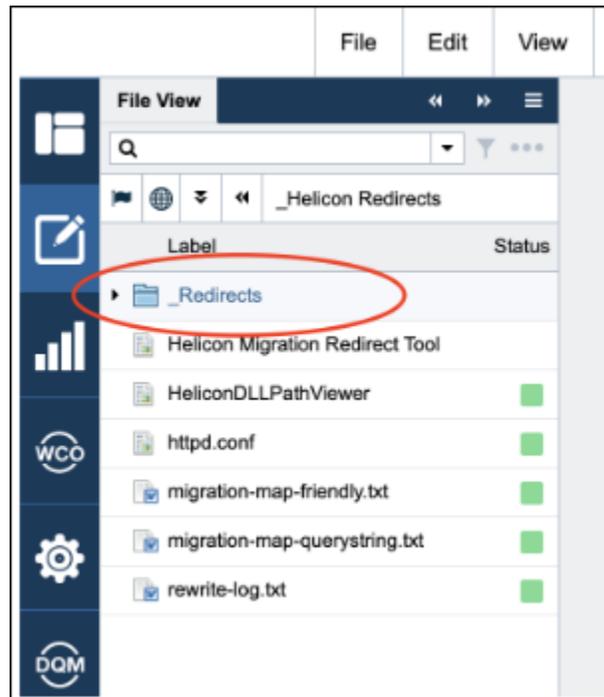
## Helicon Redirects

Use helicon redirects to create campaign URLs or to set up redirects. There are several ways to do this. For the novice user, navigate to the **Helicon Redirects** folder under your site's Configuration folder.

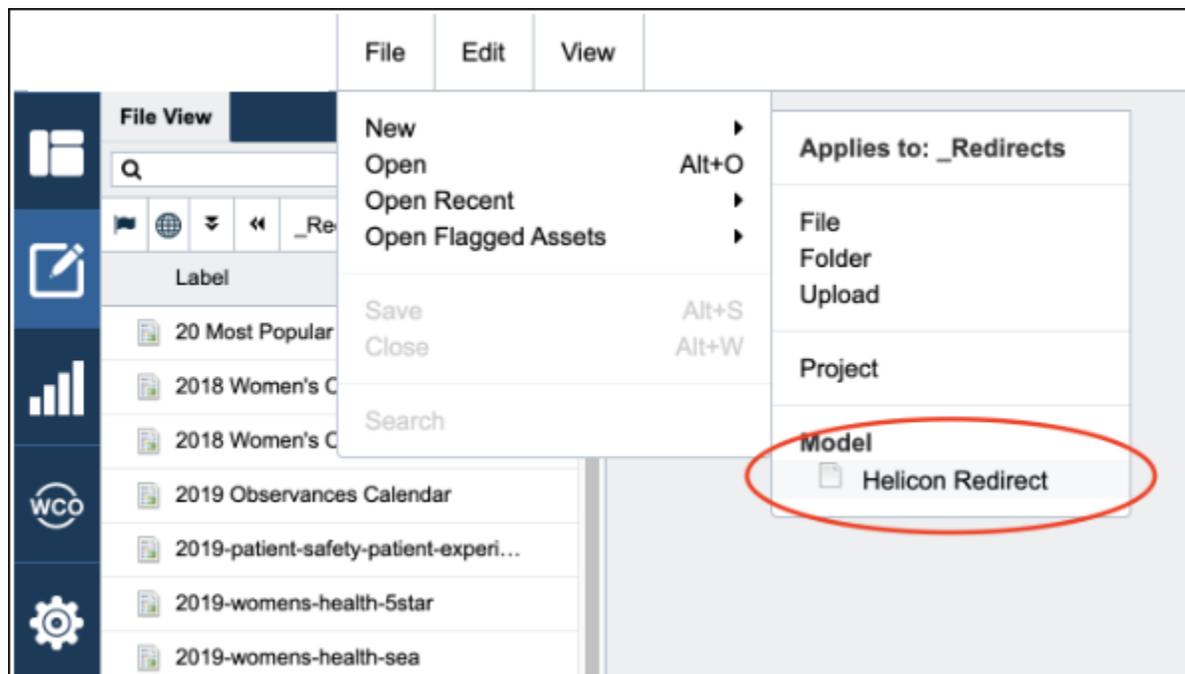


## Setting up a redirect

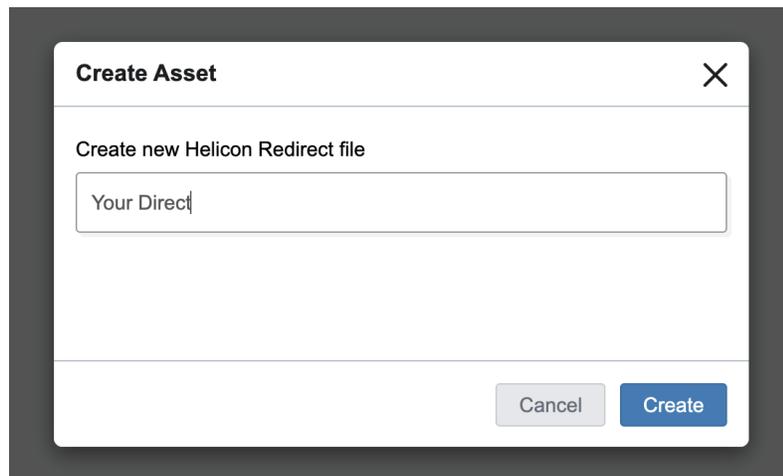
In your Helicon Redirects folder, open up the **Redirects Folder**:



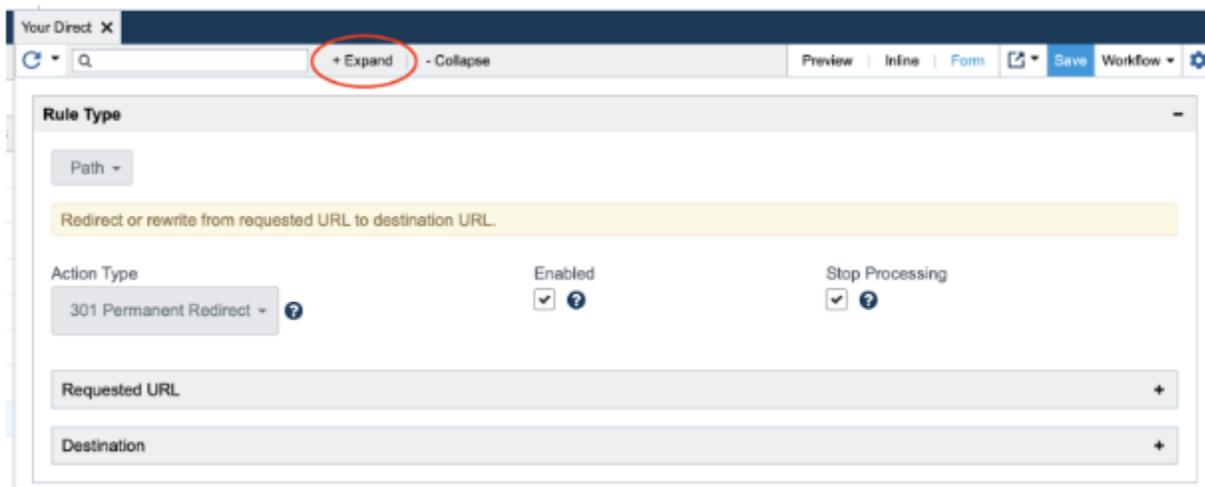
Go to **File > New > Helicon Redirect**:



A modal will present prompting you to name your **Helicon Redirect**. Name it something appropriate so that you can easily locate it in the future:



You'll be presented with a screen like this. Click **Expand** at the top of the page to expand all of your divs:



Now you should see options for **Requested URL** and **Destination URL**:

Your **requested URL** is the current page that needs to be redirected somewhere else or the campaign URL you’re wishing to create.

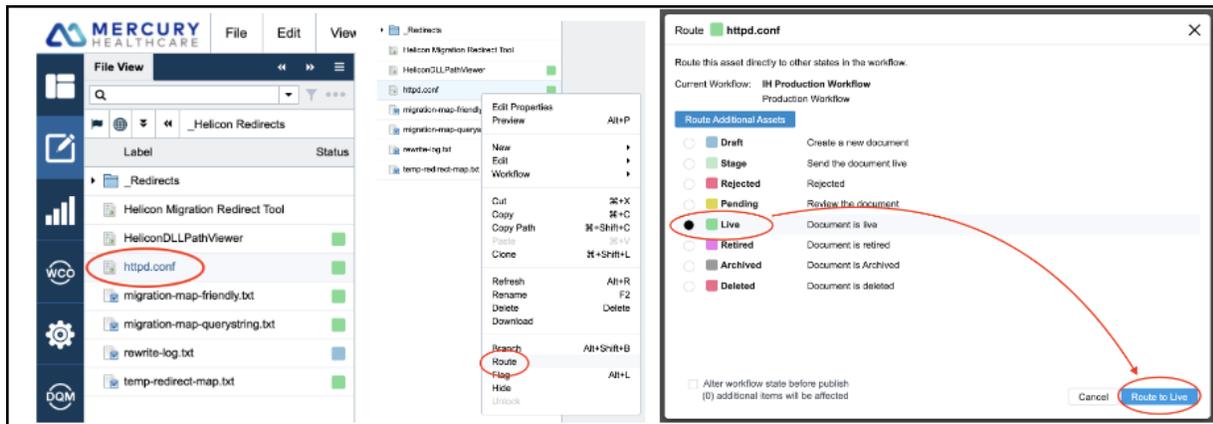
- If you’re wanting to create a campaign URL, simply enter the relative path of your campaign URL, for example: /campaignURL

The **destination URL** is the page where your redirect needs to go. This can be internal or external.

- If you plan on placing ads that append query strings to your URL, be sure to click the “Append Query String from Original URL” box.

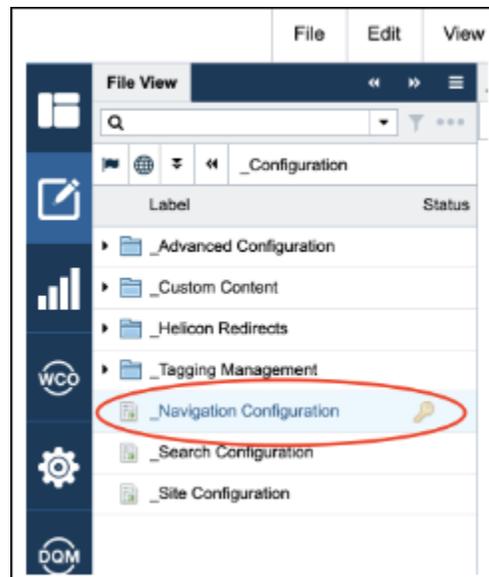
When done completing these fields, **Save** and deploy to live.

Now you have to publish the **http.conf** file. The http.conf file can be found under your **Helicon Redirects** folder. Simply right click on the file and go to **Route > Publish to Live**.



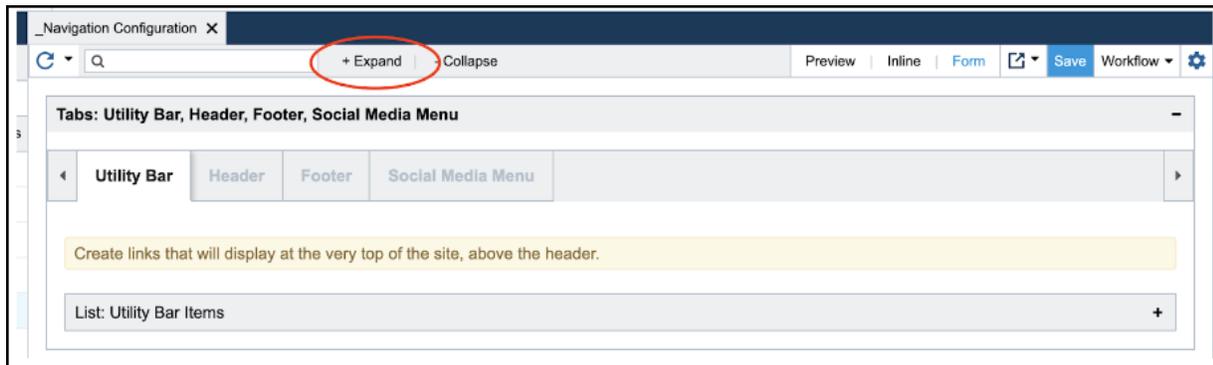
## Navigation configuration

The Navigation Configuration of your site allows you to edit and adjust the links for your site's utility, header, and footer navigations.



**Note:** Not all sites use their navigation configuration for the utility navigation. Some use the Configurable Header instead.

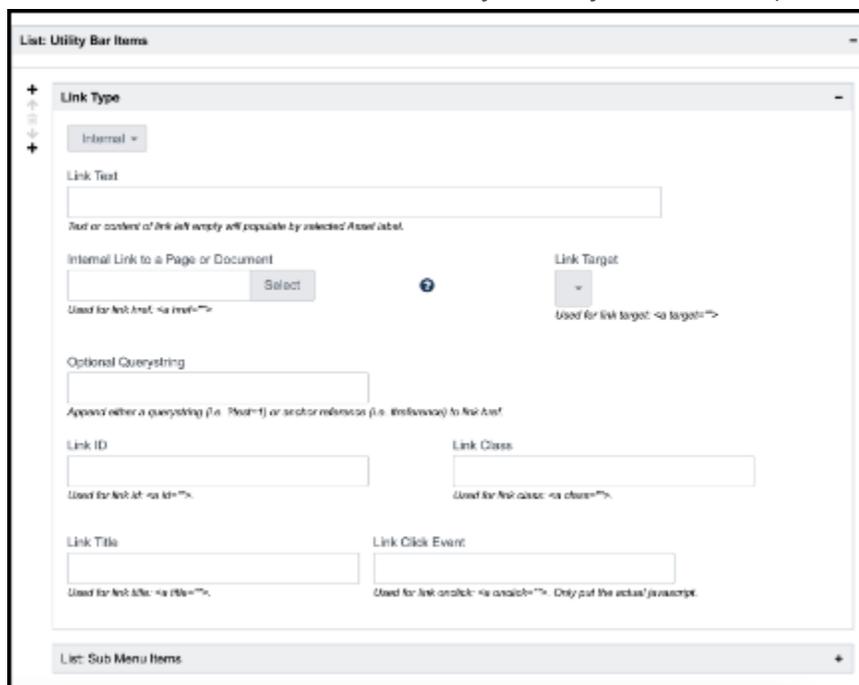
After you've opened your navigation configuration, click the **Expand** button at the top of the screen to open up all of the link <div>s.



Now you can edit, add, remove links from the utility navigation and utility nav dropdowns (using Sub Menu Items), assuming your site is configured appropriately.

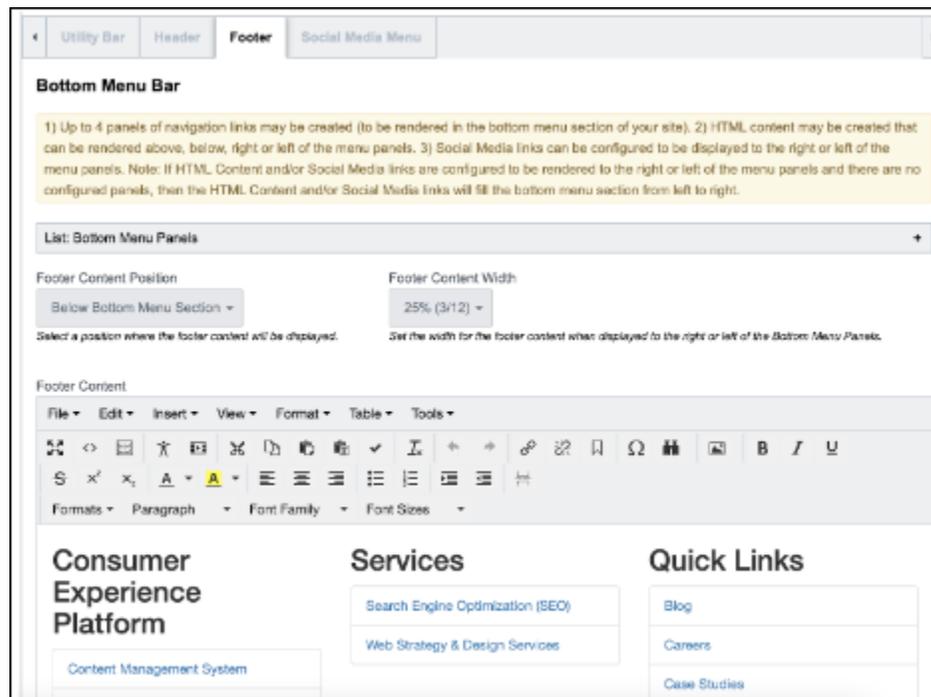
- **Internal or External:** Tells the site what type of link it is
- **Link Text:** The language you want to have show up in your menu
- **Link Target:** Tells the site how you want the link to open
- **Optional Querystring:** Add querystrings for tracking purposes

Complete these fields for all links that need to sit within your utility nav. **Save** and publish to live.



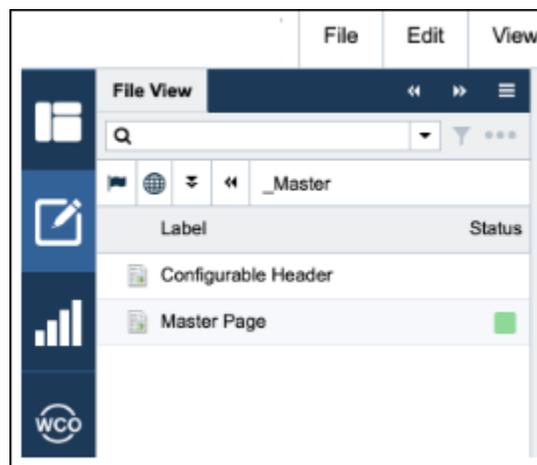
These same steps will hold true for your **Header Navigation**.

The **Footer Navigation**, on the other hand, is powered by a WYSIWYG:



We suggest you toggle to source code to make edits to your footer links.

After any edits to your **Navigation Configuration**, it is best practice to republish your **Master Page**, which sits under **Assets > Master**.

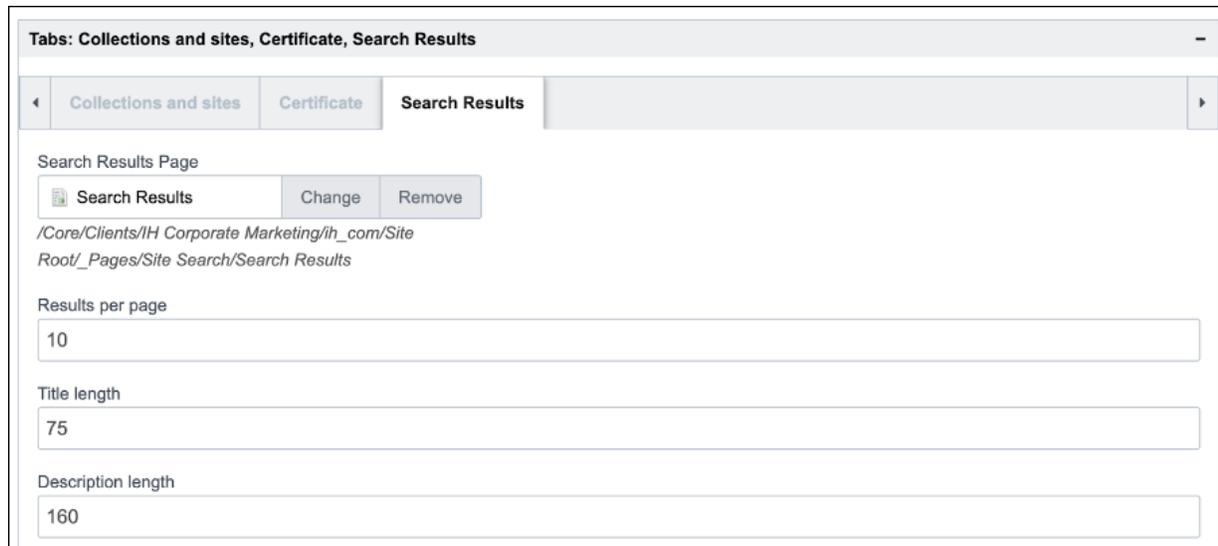


In your navigation configuration, you will see another section for the **Social Media Menu**. You should never need to edit this.

## Search configuration

Your site's search configuration should already be set up by the WebMD Ignite team during your site's development. You should never really need to edit this unless you want to change your search results destination page, the number of search results that appear, and the length of result titles and descriptions.

You will never need to edit **Collections and sites** or **Certificates**.

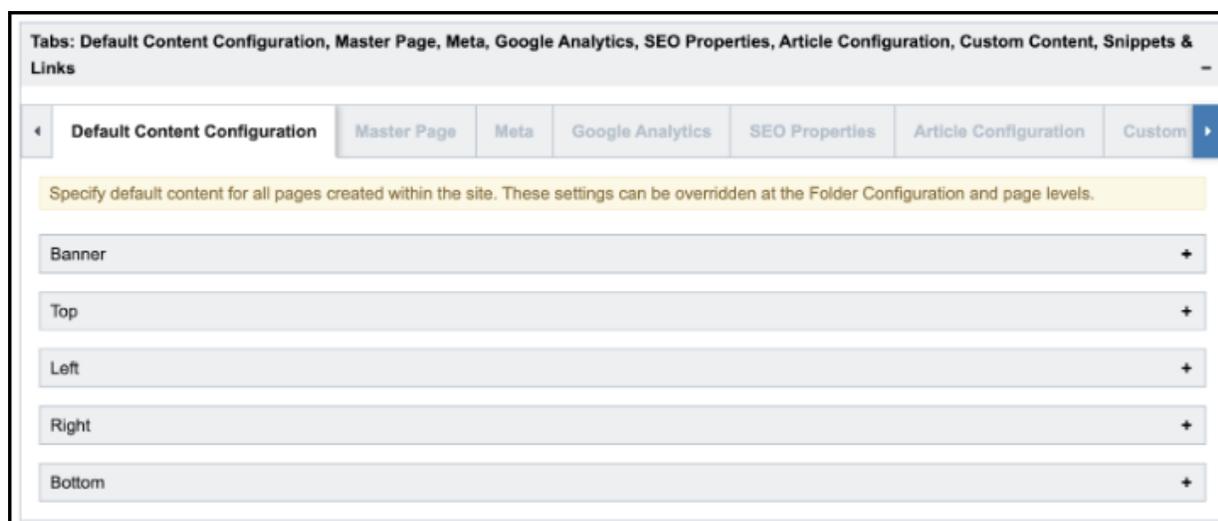


## Site configuration

Your site configuration file allows you to make edits to your site on a global level. There are several tabs within your site configuration: Default Content Configuration, Master Page, Meta, Google Analytics, SEO Properties, Article Configuration, Custom Content, and Snippets & Links

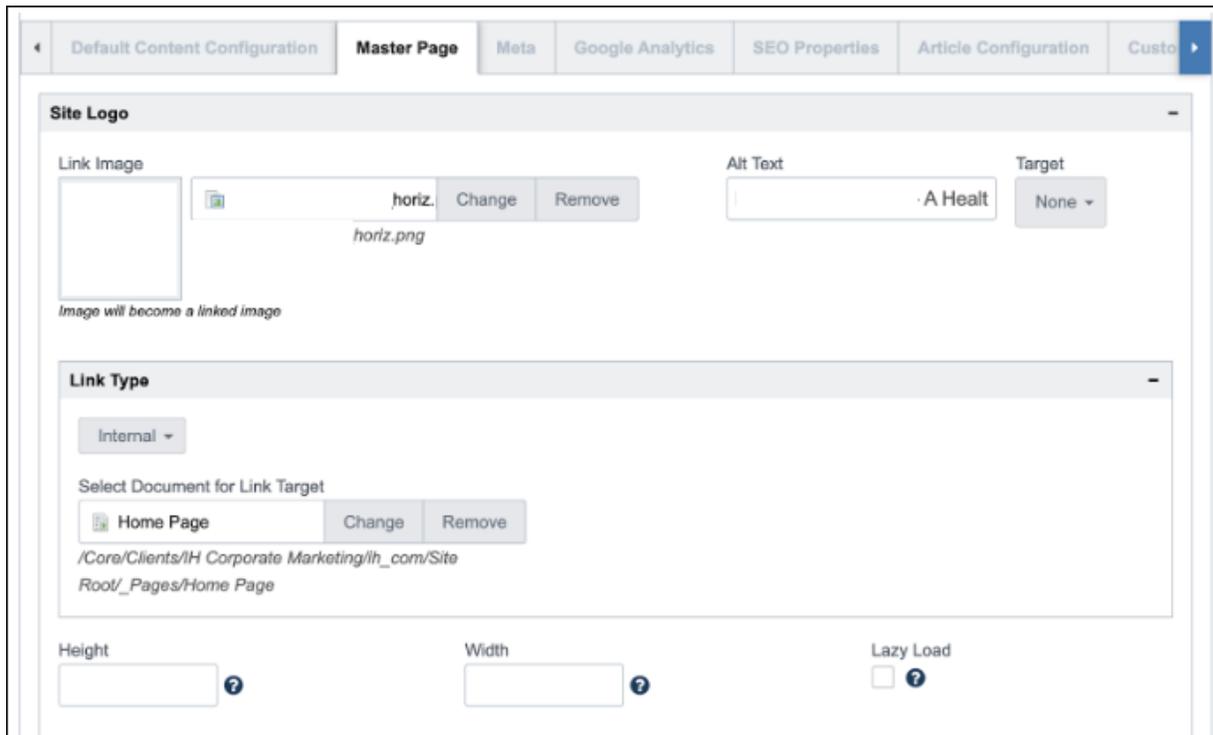
**Default Content Configuration** lets you specify default content for certain areas of every page on your site: banner, top, left, right, and bottom. Banner adds a banner image to each page. Top adds specific content to the top of every page, and left, right, and bottom act respectively.

Top adds specific content to the top of every page, and left, right, and bottom act respectively.



The **Master Page** tab lets you determine your site's logo as well as its height, width, alt text, and link attributes. For Google Page Experience purposes, it is strongly recommended to include height and

width attributes with your site logo. For ADA compliance purposes, it is strongly recommended to include alt text with your logo.



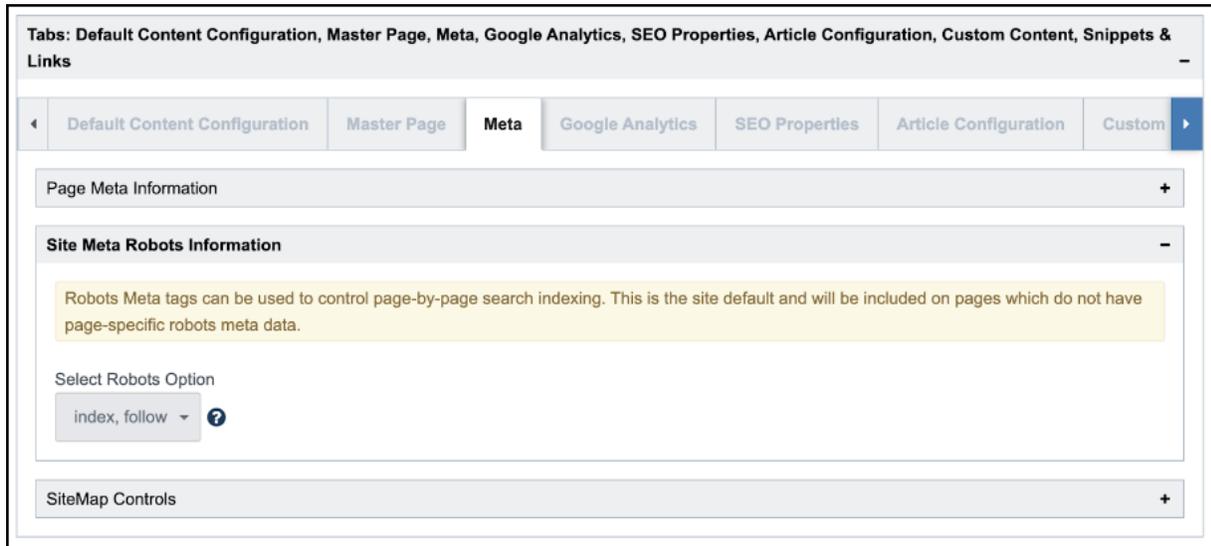
The **Master Page** tab also gives you the option to edit a few other aspects of your site, the only two of which you should ever consider editing are **Site Container Layout Types** and **Breadcrumb**. Both of these will be set up for you by youWebMD Ignite’s development team during your site implementation, however, you can adjust the width span of your pages under site container layout types and the breadcrumb enablement or disablement under Breadcrumb.



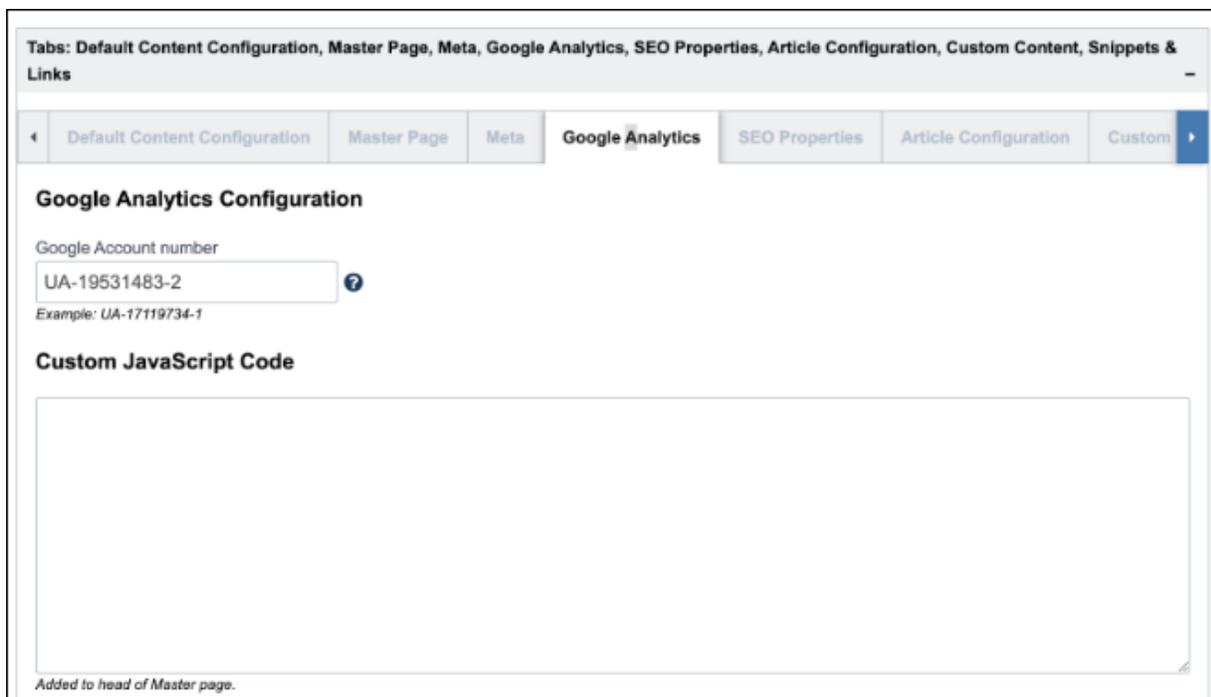
**JSS and CSS File** settings are for Google Page Experience purposes. Social Media and Facility Address are archived functionalities of the platform.

The last option under the Master Page tab is for **Site Search**. Typically, site search functionality on COD10 sites is powered through widgets, so you shouldn’t need to edit this.

On the **Meta** tab, you can make site-wide SEO updates. This is not recommended. However, if you need to have your whole site not indexable by search engines, you could toggle the Select Robots Option to `noindex.nofollow`.



On the **Google Analytics** tab, you can add your UA Google Analytics tag as well as any other Custom Analytics or tracking script that you might want to include as part of your master page. This could also be added on the Snippets & Links tab to be covered.



The **SEO Properties** tab allows you to use fields and panels to configure SEO rules for creating a smart page title for your web pages. The smart page title can be overridden at the page level by providing a value for the "SEO Title" field.

### Smart Title Configuration

Use the following fields and panels to configure SEO rules for creating a smart page title for web pages. The smart page title can be overridden at the page level by providing a value for the "SEO Title" field.

Facility Display Name

Facility Location - City  Facility Location - State

Primary Target Market - City  Primary Target Market - State

The **Articles Configuration** and **Custom Content** tabs are not widely used any longer, as they have been replaced with custom content layouts and fields which offer far more flexibility. The last tab for **Snippets & Links** lets you quickly and easily place script or style into the `</head>`, `<body>`, or `</body>` of every page of your site.

**Head Close Snippet**

```
<script defer src="https://unpkg.com/smoothscroll-polyfill@0.4.4/dist/smoothscroll.min.js"></script>
<!-- Google Tag Manager -->
<script>(function(w,d,s,l,i){w[l]=w[l]||[];w[l].push({'gtm.start':
new Date().getTime(),event:'gtm.js'});var f=d.getElementsByTagName(s)[0],
j=d.createElement(s),dl='dataLayer'&l='+l+'.j.async=true;j.src=
'https://www.googletagmanager.com/gtm.js?id='+i+dl;f.parentNode.insertBefore(j,f);
})(window,document,'script','dataLayer','GTM-TCPM4V9');</script>
<!-- End Google Tag Manager -->
```

Add HTML, JavaScript snippets/links or CSS snippets/links to be output above the page's closing head tag.

**Body Open Snippet**

```
<!-- Google Tag Manager (noscript) -->
<noscript><iframe src="https://www.googletagmanager.com/ns.html?id=GTM-TCPM4V9"
height="0" width="0" style="display:none;visibility:hidden"></iframe></noscript>
<!-- End Google Tag Manager (noscript) -->
```

Add HTML, JavaScript snippets/links or CSS snippets/links to be output below the page's opening body tag.

**Body Close Snippet**

```
<div id="slideOutBackdrop"></div>
<script>
for (let i = 0; i < $(".carousel-caption-background").length; i++) {
  if ($($(".carousel-caption-background").eq(i)).text().length > 10 && $(".carousel-caption-background").eq(i).find("img").length ==
0) {
    $(".carousel-caption").eq(i).addClass("has-banner-text");
  }
}
</script>
```

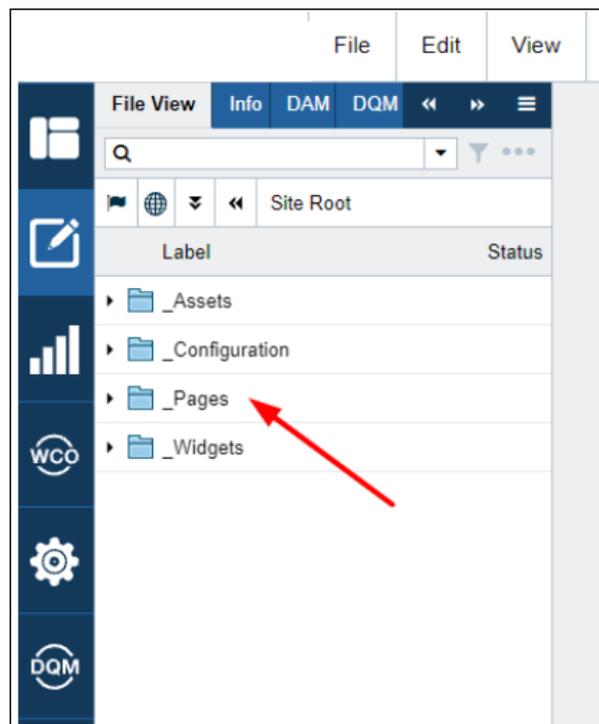
Keep in mind that any changes made at the site configuration level can easily be overwritten at the folder or page configuration level. Each folder and page gives you the option to inherit from the site config, inherit and add, or not inherit at all.

It is good practice to republish the master page after making any changes to the site configuration, just to be sure your changes propagate as intended.

## Content

### Static Pages

- Static pages are the most common type of page built within the CMS.
- They reside in the `_Pages` folder (directly under the main Site Root folder).
- With static pages, you can leverage everything from a simple WYSIWYG editor up to advanced options including widgets and custom code.



### Create/Edit pages

**Very important! ALWAYS create and use folders and files from the Model section.**

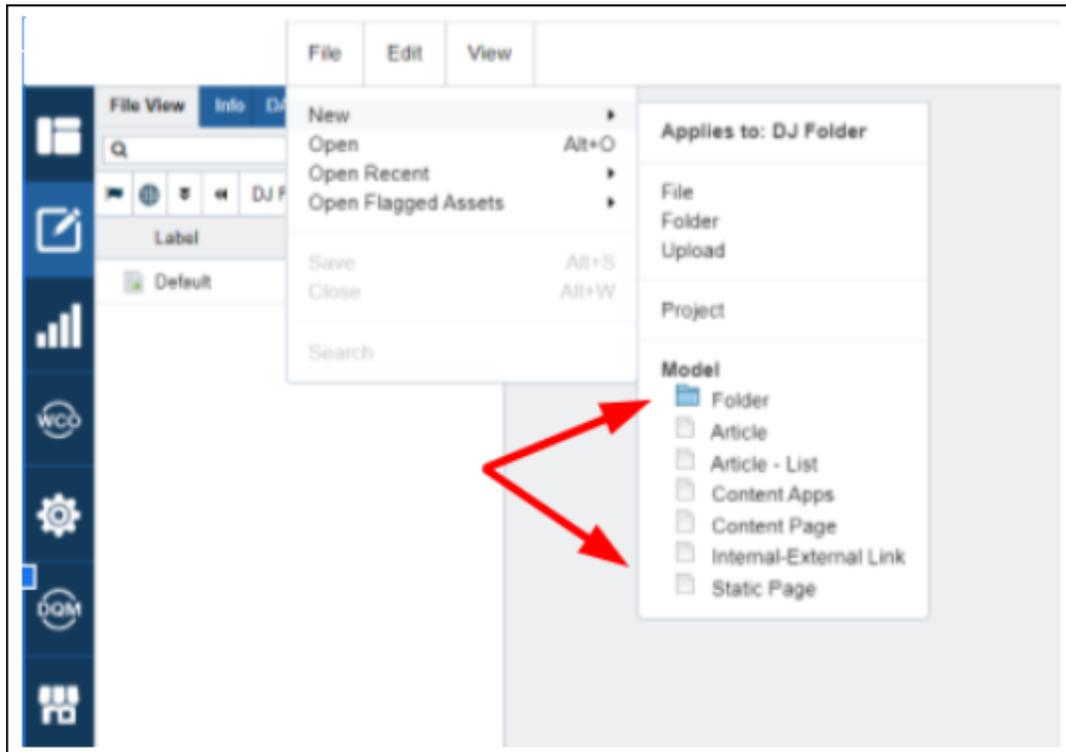
When creating new folders or pages of content, you should ALWAYS use the **Model** section.

- DO NOT use New > Folder or New > File.
- DO use New > **Model** > Folder or New > Model > Static Page

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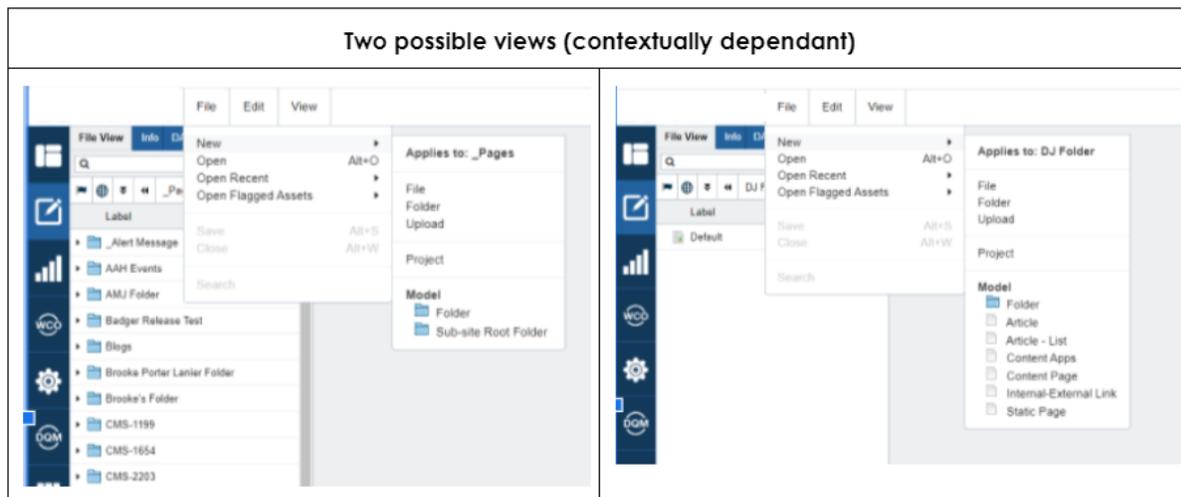
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Using Model will make use of templates that WebMD Ignite has supplied for that section and gives the CMS all the default info it needs to properly create your new folder or page including default navigation, breadcrumbs, styles etc.. Doing it this way is best practice and makes life easier for you!

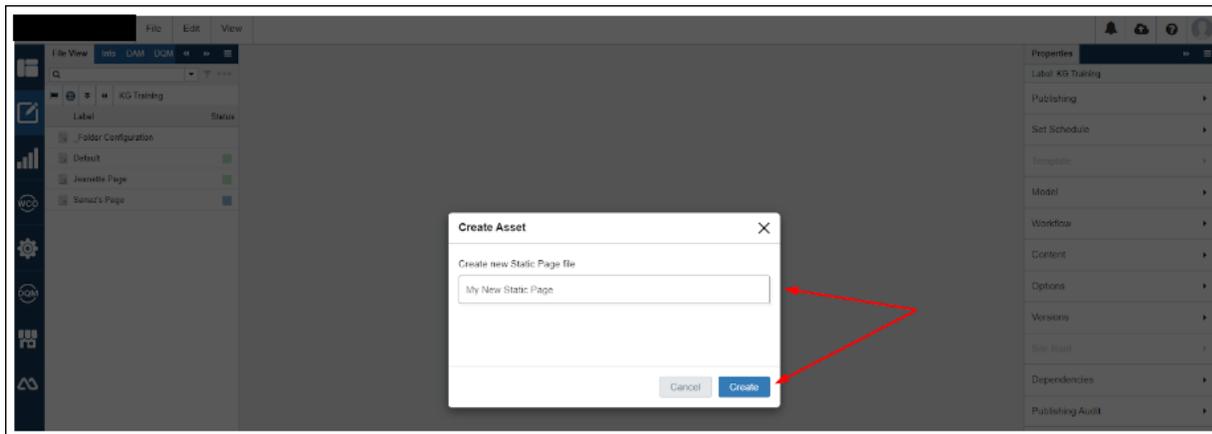


### To create a new page

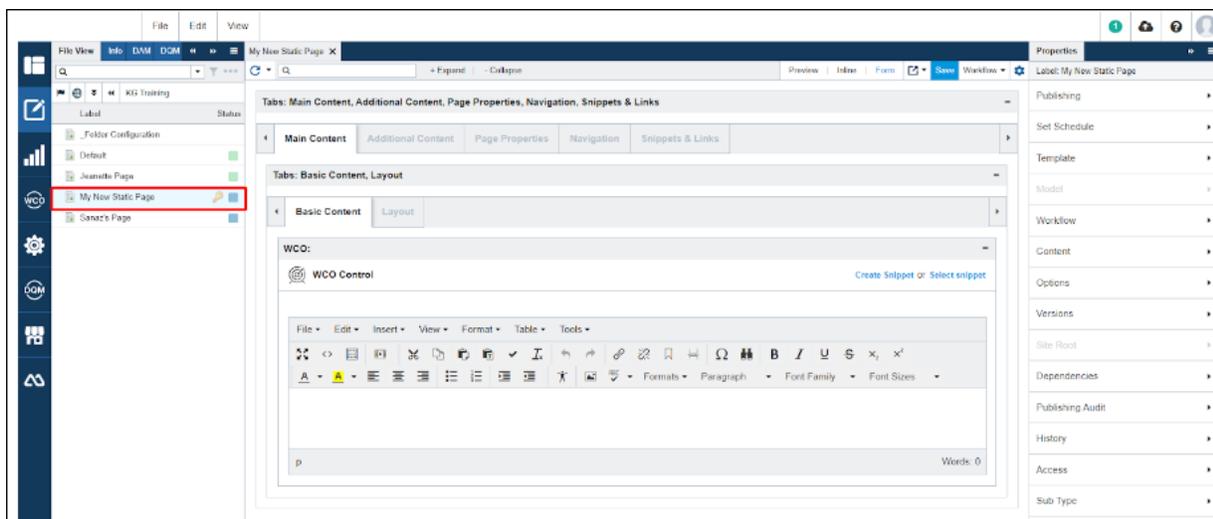
- Navigate to **Site Root**, then **\_Pages**



- A page must live inside a folder, so navigate to an existing folder or create a new one (using Model).
- Once inside the desired folder, navigate to the Model section again.
- Click **Static Page**.
- Name the page, click **Create**.



The CMS creates a new page and displays it, as shown below.



### To edit an existing page

- Navigate to the page you want to edit
- Double click page
- Page opens and is ready to be edited

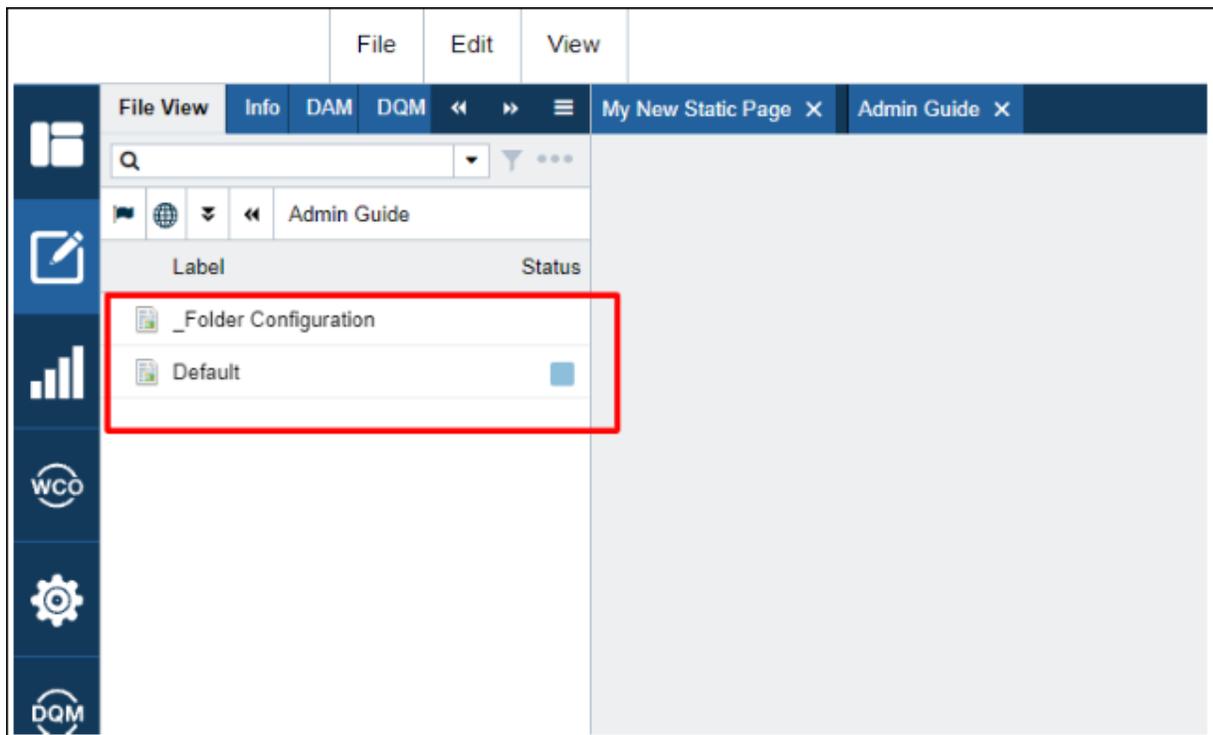
### A note about creating new folders:

When a new folder is created, the folder will contain 2 assets

- \_Folder Configuration
- Default

Default will be the landing page for the content stored in that folder. \_Folder Configuration will contain all the configuration settings that apply to just that folder

If you don't see these 2 assets, you didn't use the **Model**. Delete the folder and try again.

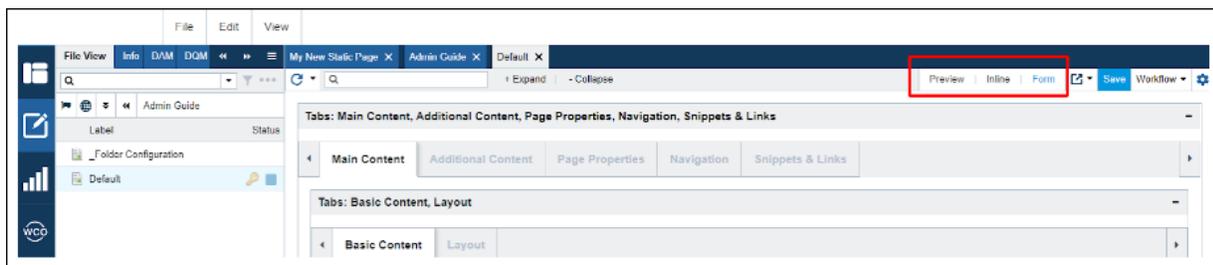


### Editing default page

You can edit the folder's default page like any other page simply by double clicking **Default**.

### Options for viewing content from Edit View

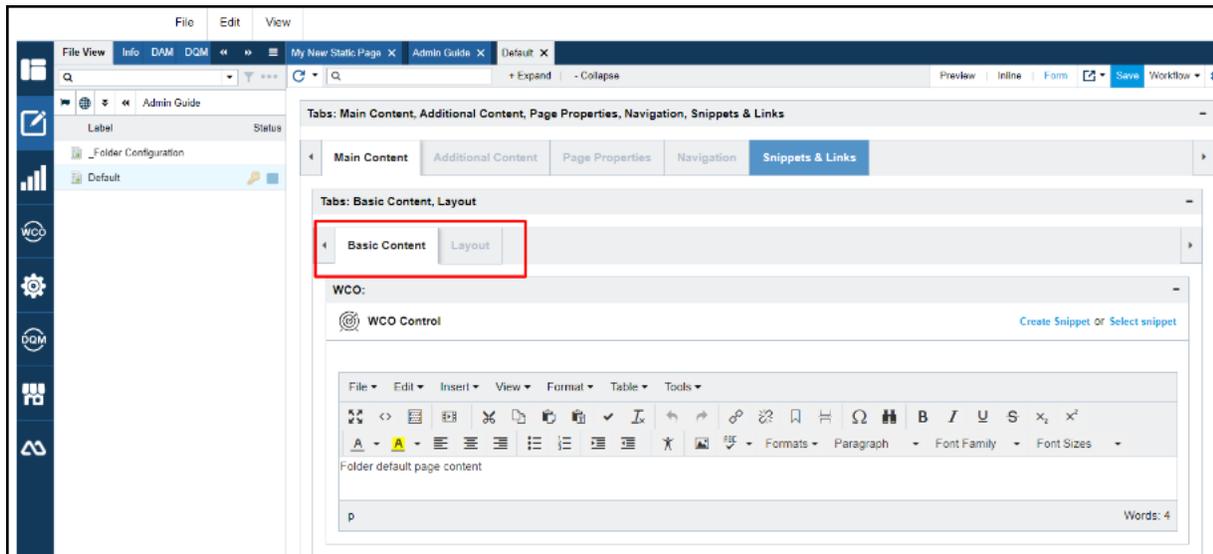
When a page is opened for editing, Notice buttons in top right, **Preview**, **Inline**, and **Form**. This is how you will view the content.



- Form (recommended) - gives you access to every data element on the page
- Preview - gives a representation of how it will look on the front end
- Inline - allows you to modify the content on the page, inline with the page. Easy editing!

### Basic vs. Advanced layout

Once your page is opened and ready for editing in **Form** view, you will notice options to edit in **Basic Mode** or **Layout**.

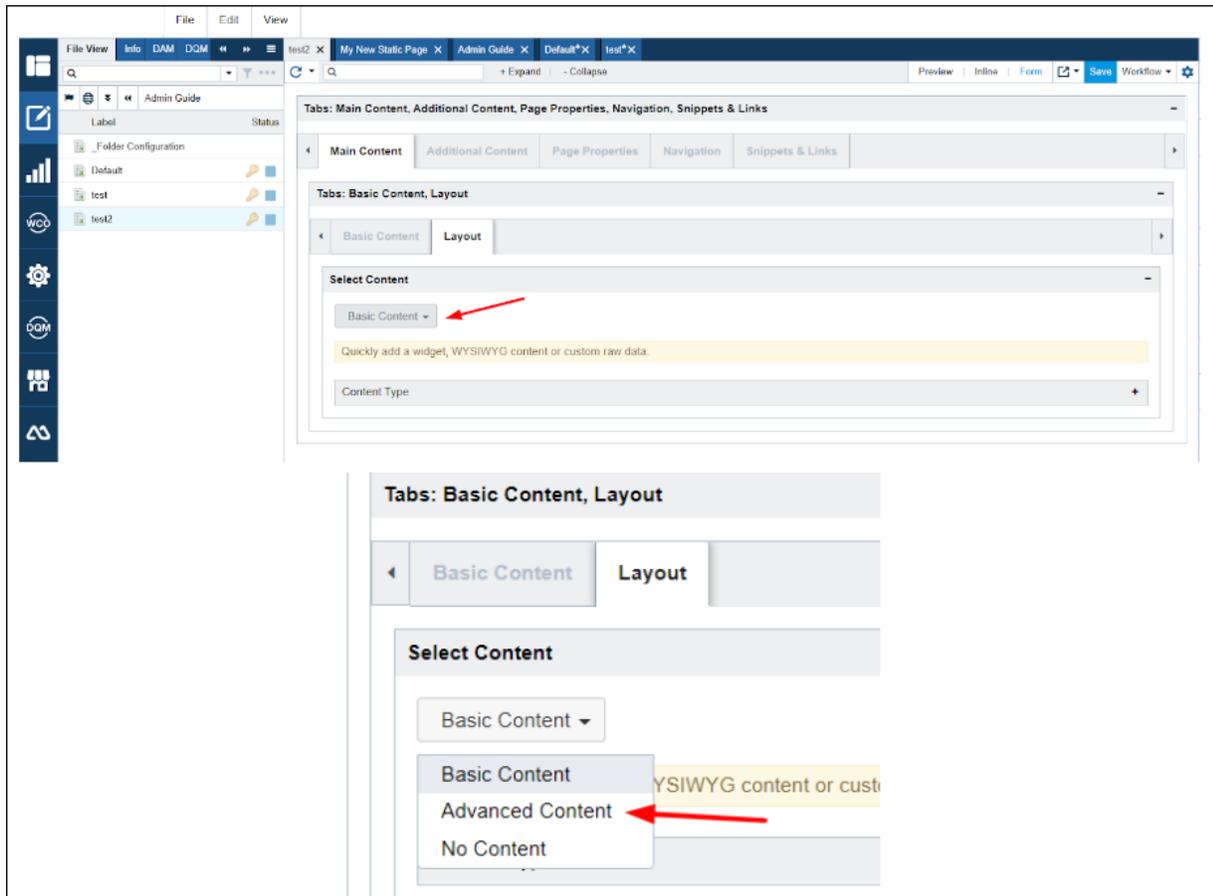


- Basic Content - used only for simple edits
- Layout (Recommended)

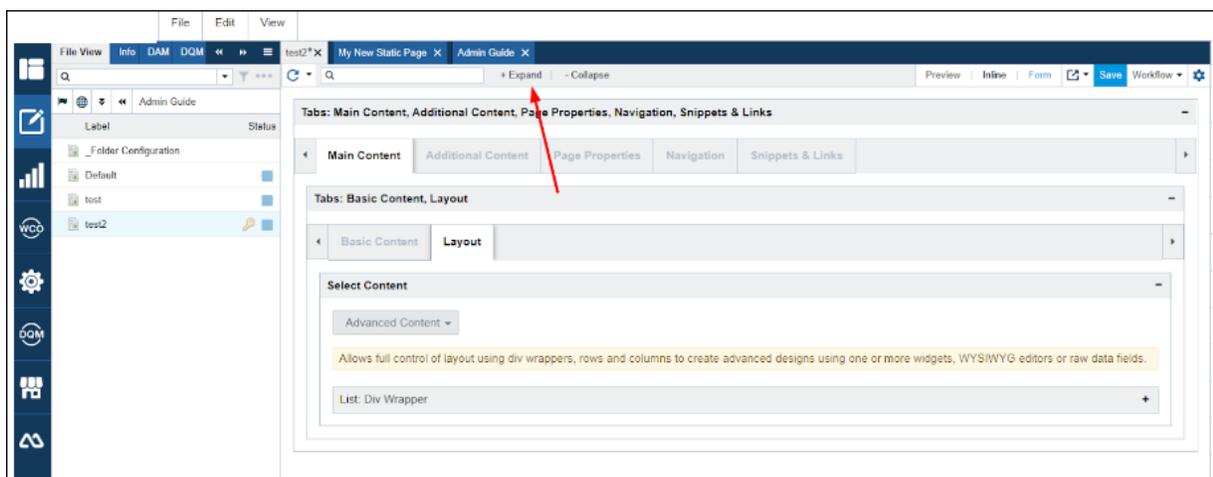
Best practice - even for small edits, it is often better to get in the habit of using the Layout tab where all the editing functionality is available. Otherwise you are locked into the basic editing capability on that page.

Here is the recommended approach for editing:

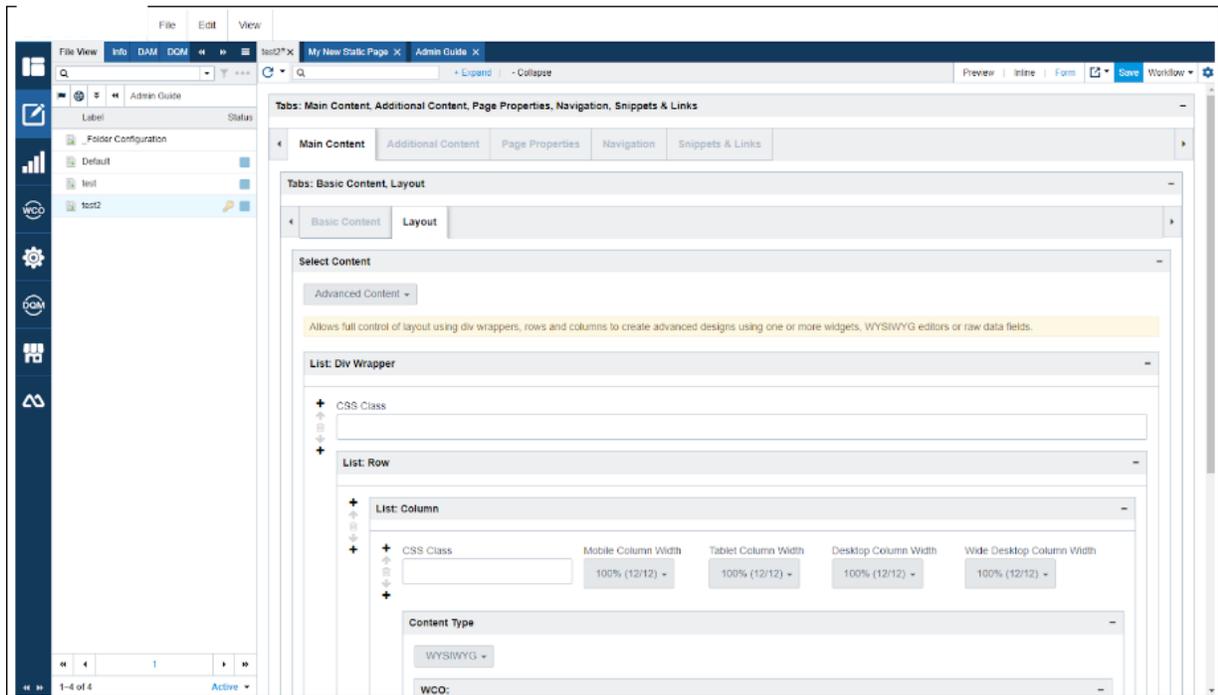
- Open page in **Form** view.
- Click the **Layout** tab.
- Select the **Content** section, then click the arrow next to **Basic Content** to reveal the **Advanced Content** option.



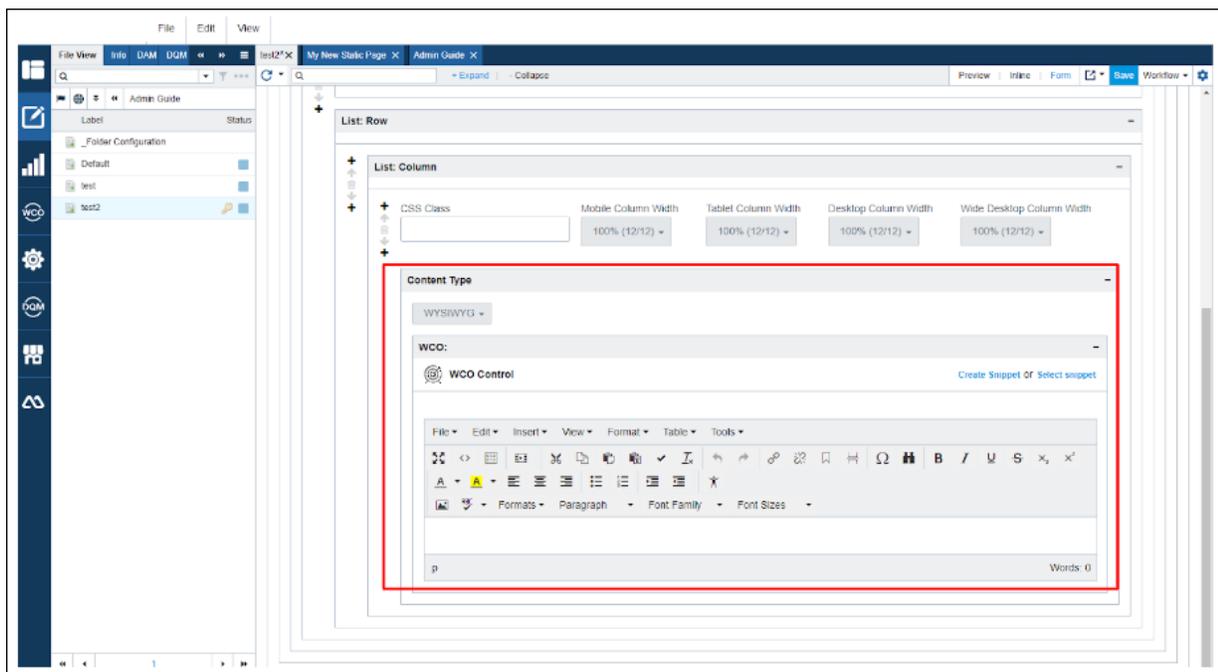
- Click **Advanced Content**.
- Now go to the top of the screen and click **Expand**, as shown below.



- You will see a large grid open as shown below



- Scroll down to the **Content Type WYSIWYG editor** to begin making simple edits



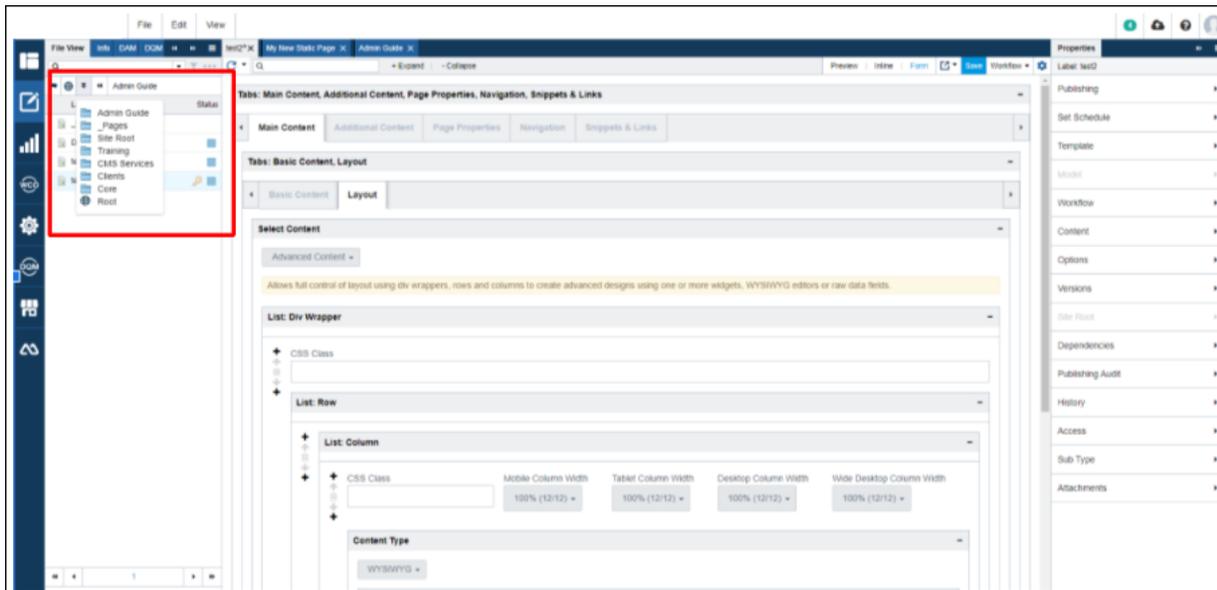
Pause for a moment to consider what you are seeing on the screen now.

Here I have clicked the down arrow showing the folder structure of where this page lives.

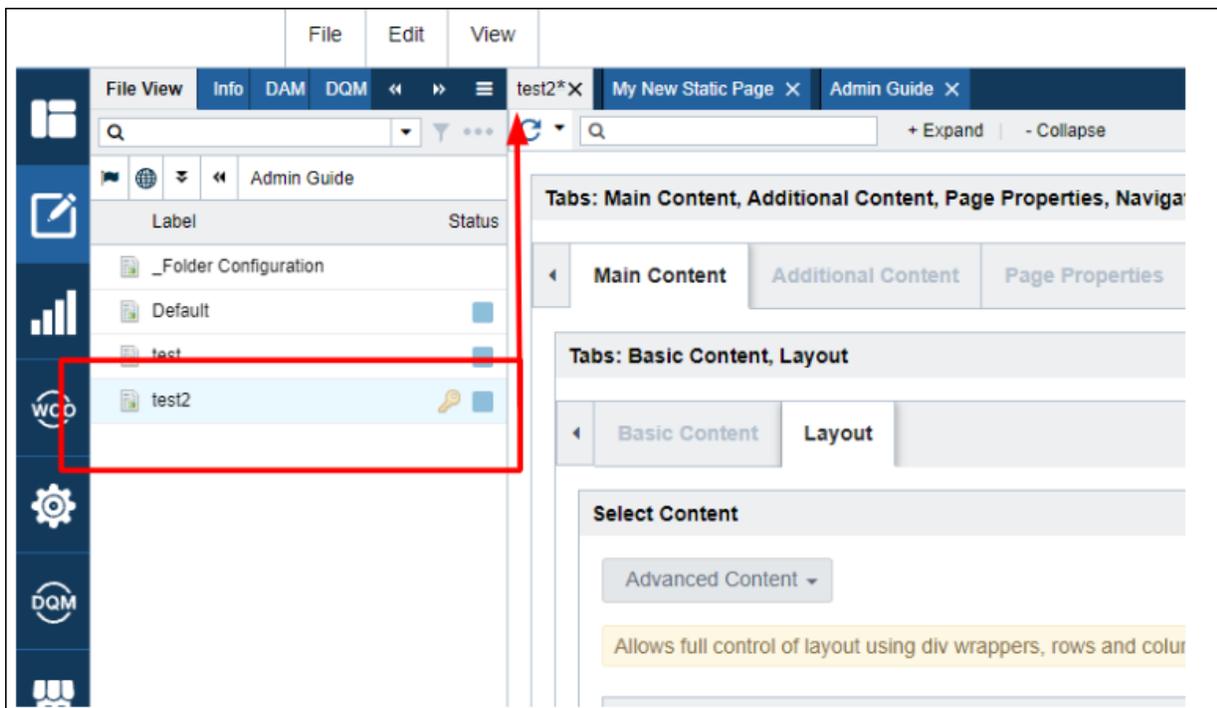
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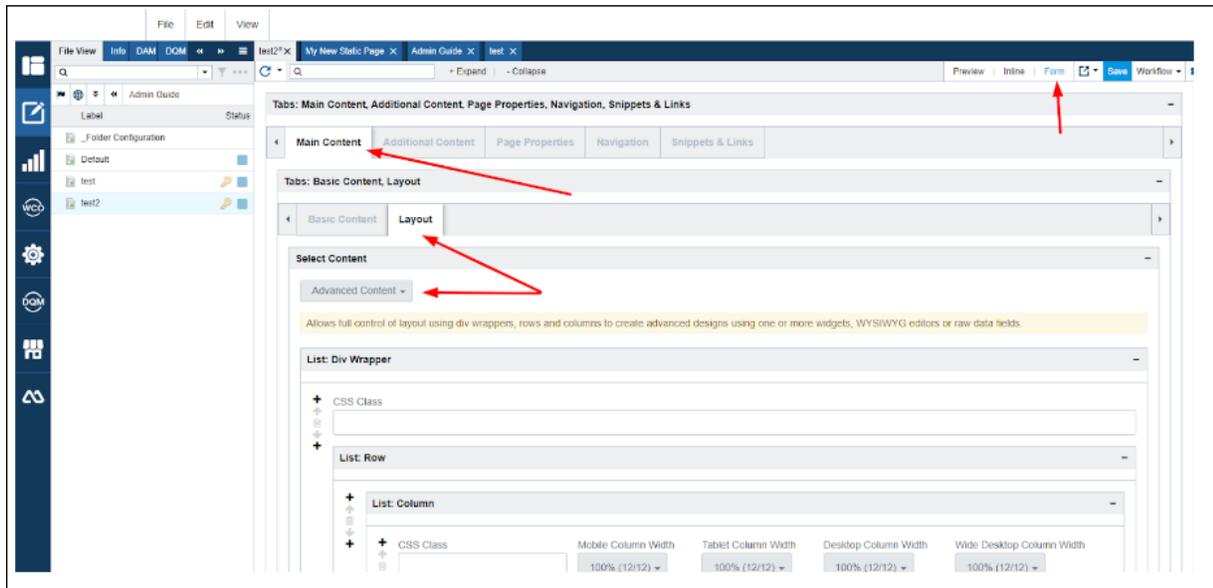
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This shows my open page that I am currently editing. In the left navigation pane, the file I have focused on is highlighted in a blue background. On the right side, the tab corresponding to the page is also highlighted.

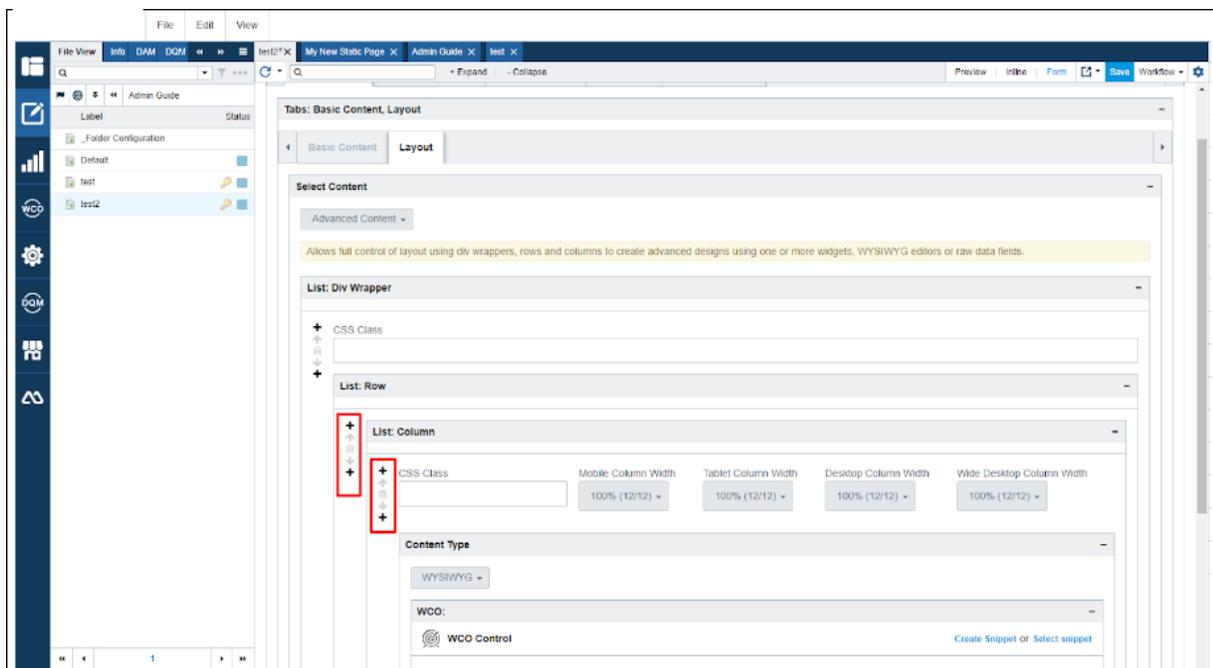


This shows we are in **Form** view, on the **Main Content** tab, in **Layout** mode, using **Advanced Content** type.



## Adding Rows & Columns

Use the + controls to add **Rows** or **Columns** above or below the current section you are editing.



Rows show up on the front end as expected.

Columns also require widths to be assigned to resolve on the front end as expected.

- These are the default values for column width for each device type.

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Mobile Column Width	Tablet Column Width	Desktop Column Width	Wide Desktop Column Width
100% (12/12) ▾	100% (12/12) ▾	100% (12/12) ▾	100% (12/12) ▾

- This is based on the bootstrap 12 column grid.
- Any column count, in a given row, that adds up to >12 will wrap to the next line.
- Below we change both **Desktop Column Width** and **Wide Desktop Column Width** to 50% and it makes each column take up half of the page.

The screenshot shows a content editor interface for a 'List: Row'. It contains a 'List: Column' section with four columns: 'Mobile Column Width' (100% (12/12)), 'Tablet Column Width' (100% (12/12)), 'Desktop Column Width' (50% (6/12)), and 'Wide Desktop Column Width' (50% (6/12)). Below this is a 'Content Type' section set to 'WYSIWYG' and a 'WCO' section with a 'WCO Control' snippet. A rich text editor is visible with the text 'Here is my Row 1, Column 1' and a word count of 5. Red arrows point from the text 'Here is my Row 1, Column 1' to the 'Desktop Column Width' and 'Wide Desktop Column Width' dropdowns.

The screenshot shows the published page layout. At the top right, there are links for 'PATIENT PORTAL' and 'LOGIN OR REGISTER'. Below this is a search bar with the text 'Find a Event'. The main content area features a blue button labeled 'ADMIN GUIDE' with a sub-label 'test2', followed by a large blue header 'TEST2'. Below the header, the content is displayed in a grid: 'Here is my Row 1, Column 1' and 'Here is my Row 1, Column 2' on the first row, and 'Here is my Row 2, Column 1' on the second row.

## Publishing pages

Now you are ready to publish your page. These are the controls we will use.

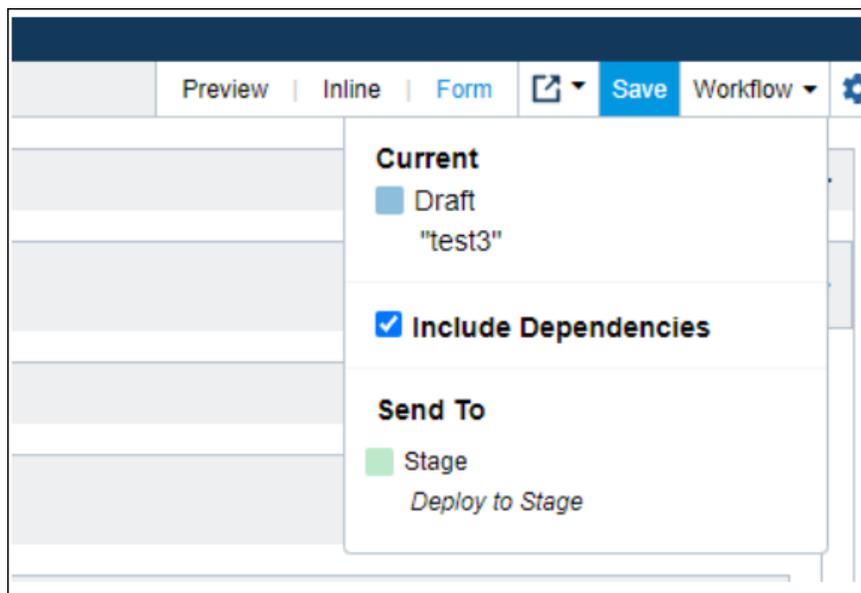
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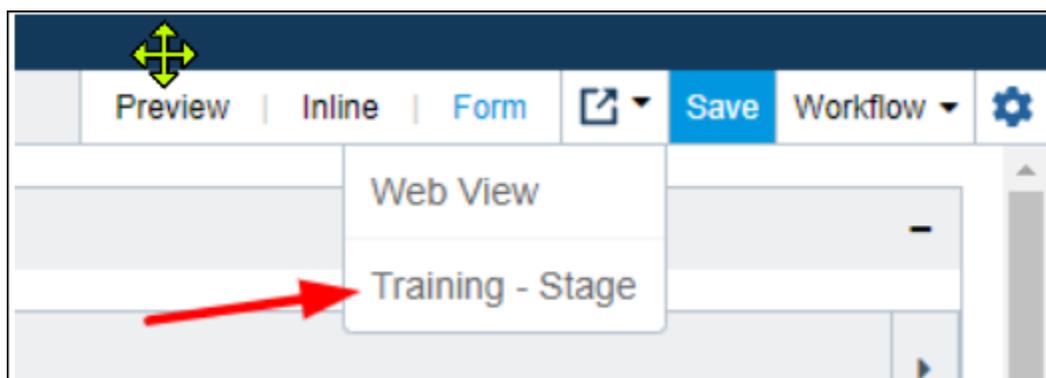
### Steps for publishing your page

1. Click **Save** in the top right
2. Click **Workflow**.
3. Click **Deploy to Stage**.

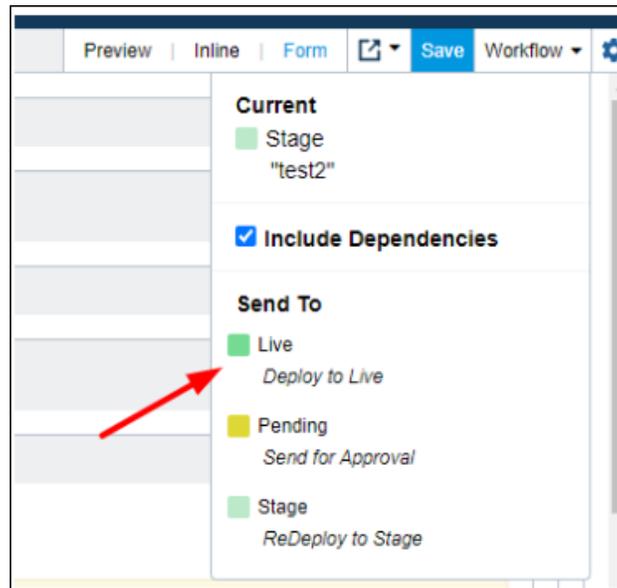


As the name 'Stage' implies, this will publish your page to a place where you can review the changes and make additional edits, until you are ready to publish to your Live site.

To review this page in Stage, click the box with the arrow, then click the stage site. This will open another tab and display the page as a consumer on the front end would see the page.



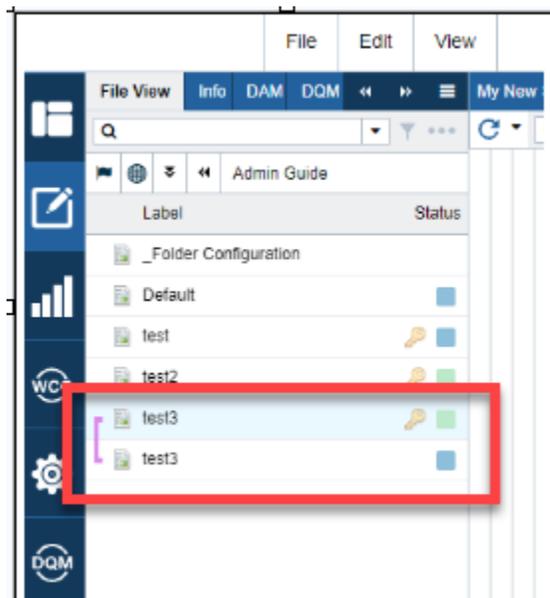
Once you are ready to publish the page to your Live site, click **Workflow** again. You will see different options since the page is now in a different stage of its assigned workflow. Select, **Deploy to Live**.

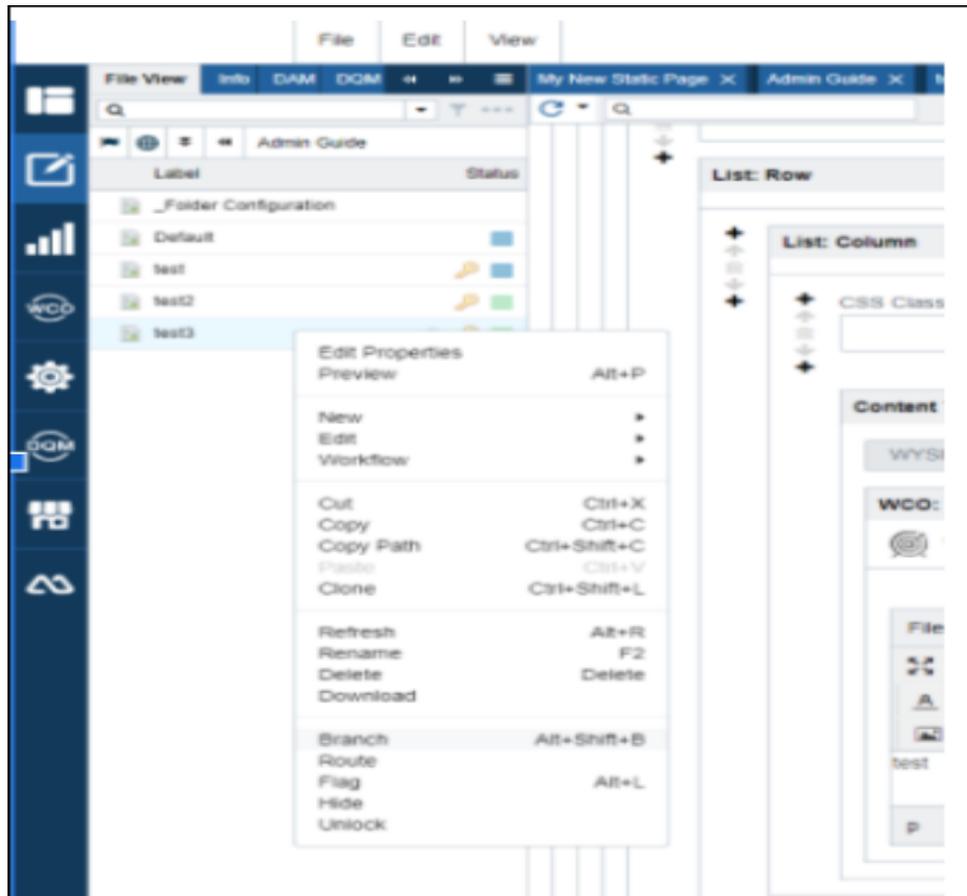


## Branching pages

When making changes to a page, it is best practice to first branch the page so the original version is kept intact until you are ready to replace it with the new version of the page.

To do this we 'branch' the original page. Right click on the file. Then click **Branch**.





It makes a copy of the page and leaves it in Draft mode. From here you can open the branched page, make your changes and publish them to Stage.

When you publish the branched page to Stage, this is what happens:

- If the original page never made it out of the Stage area of the workflow, the CMS automatically retires the original page, and your new branched page is promoted to Stage.
- If the original page had been published to Live, it would leave the original in Live and your branched version is promoted to Stage.

When that branched page is promoted to Live, the CMS automatically retires the original page and your branched version is promoted to Live.

## Renaming pages

**Warning!** Unless a page or folder is still in Draft (never been published), DO NOT ever simply rename a page or folder by right clicking and selecting **Rename**.

Also, do not rename the **Default** filename in the left navigation. 'Default' is a special name that informs the CMS that this is the landing page for that particular folder. This is used for building navigation structures.

## A word about renaming pages

Renaming files and folders can be a little tricky in the CMS. Renaming a page is more straightforward than renaming a folder. Before renaming, consider your end goal for renaming a file or folder and the available options that will best meet your objectives. Sometimes renaming is not the best option.

Always follow the procedures described in this section to safely rename and avoid unintended consequences.

Never simply right-click the file and select Rename. Simply renaming a file, does not remove the original version of the file from the server, which means the original file can still be discoverable in the future. This can cause your newly named page to fail to render, as expected in the future. All files and folders must be routed back to draft prior to renaming to avoid unintended consequences from renaming.

There are several pieces of a page/file to consider when renaming a page, each one having its own procedure.

- Changing the page's URL
- Changing the File Name (in Page Properties tab) which impacts the saving of future edits
- Changing the Page Name (in Page Properties tab) which impacts how the page name is displayed in breadcrumbs, navigation links and H1

## Procedure to change the URL of a page

It is important to first retire the page to Draft (to remove it from the server) prior to renaming. If the page is currently in Draft, proceed to step 2.

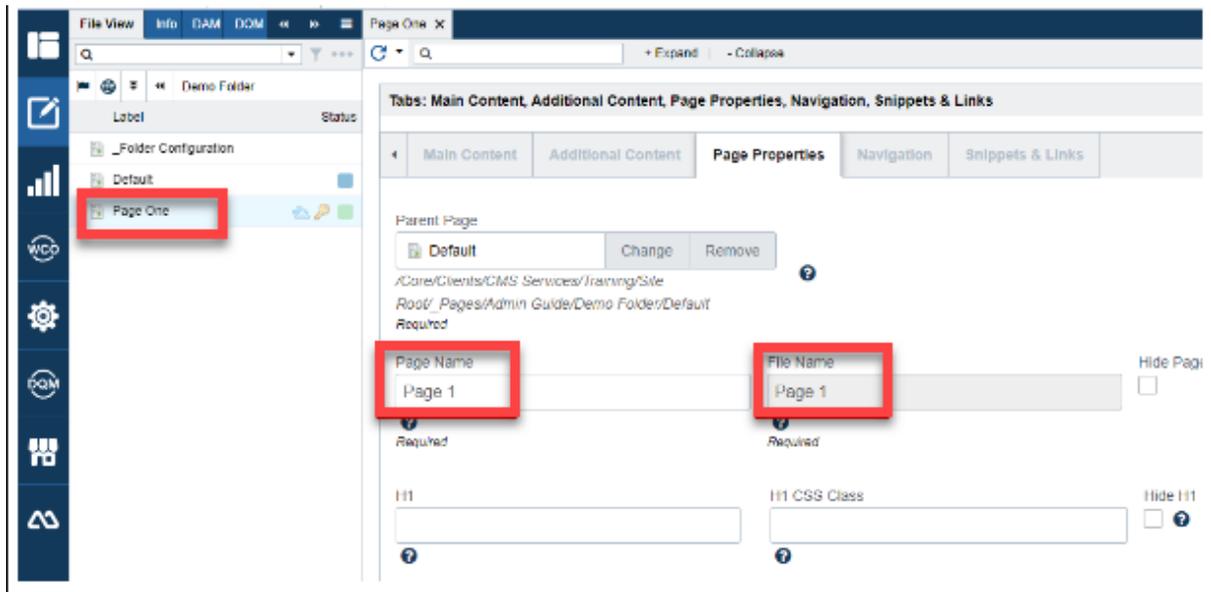
To rename a page that has advanced past Draft in the workflow:

1. Retire the page to Draft
  - a. Right click on the file.
  - b. Select **Route**.
  - c. Select **Draft**.
  - d. Click the **Route to Draft** button.
2. Now right click the filename, select **Rename**.
3. Enter the new name.
4. Republish the page to Stage or Live, as desired
  - a. [Optional] Consider setting up a redirect since the URL has now been changed.
5. Rename the **File Name** in Page Properties to match
6. Rename **Page Name** in Page Properties to match

The end result of renaming a Page following the procedure above thru step 4 is that it will only change the URL of the page. You must also change the **File Name** and **Page Name** in the Page Properties tab to match the new URL to avoid unintended consequences in the future. Read through the following section to better understand why this is important to do as part of the renaming process.

## The renaming process, explained

Let's say, for example, I rename **Page 1** to **Page One** using the procedure above, stopping at Step 4. If you then navigate to the page properties tab, it will still show 'Page 1' for **Page Name** and **File Name** as shown below.



However, the URL is updated to the new name, .../page-one  
<https://stage-training-ih-ih.cphostaccess.com/admin-guide/demo-folder/page-one>  
 This is indicated in the file view structure on the left (Page One) and the file's main tab at the top just under the 'View' menu option.

So on the front end, the webpage looks like this:



To finish the renaming process, we have to also update the **File Name** and **Page Name** in the Page Properties tab.

### Procedure to rename File Name in Page Properties

It is important to change the **File Name** so that future edits are not overwritten by the original content. This is explained later.

To fix the File Name to reflect the new name, you must fix its file title. To do this, you must go into **Properties > Content**.

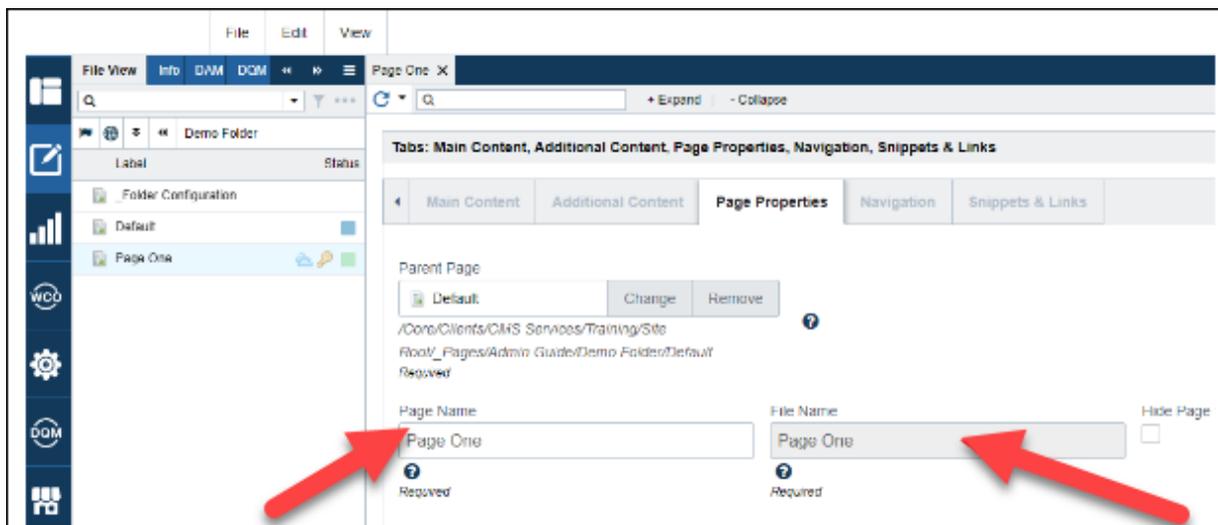




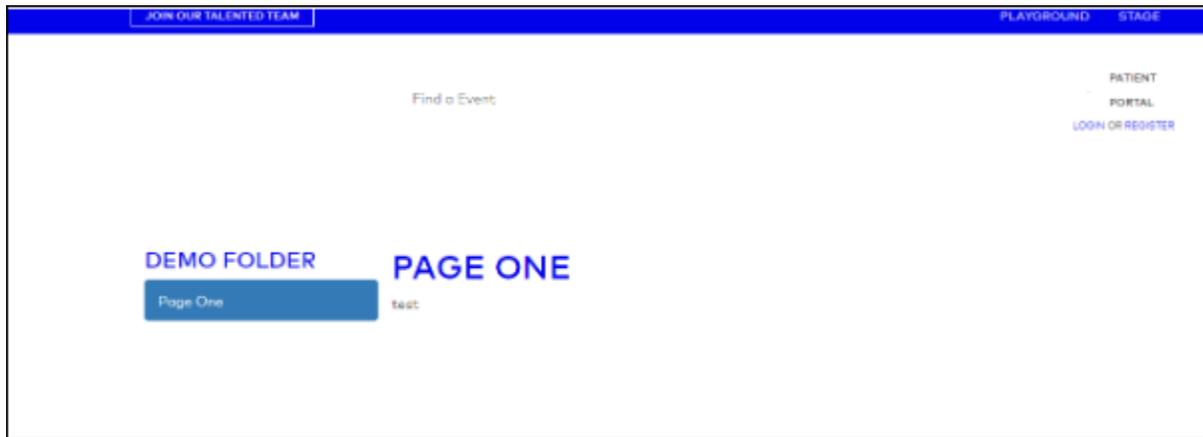
To fix this, you must also change the **Page Name** to match the new name.

### Procedure to rename Page Name in Page Properties

To fix **Page Name** under Page Properties to match the new URL and File Name, simply overwrite the existing Page Name field with the new name. Now the Page Properties look like this:



Now the **Page Properties** tab and the left nav name all match and the front end shows as expected.

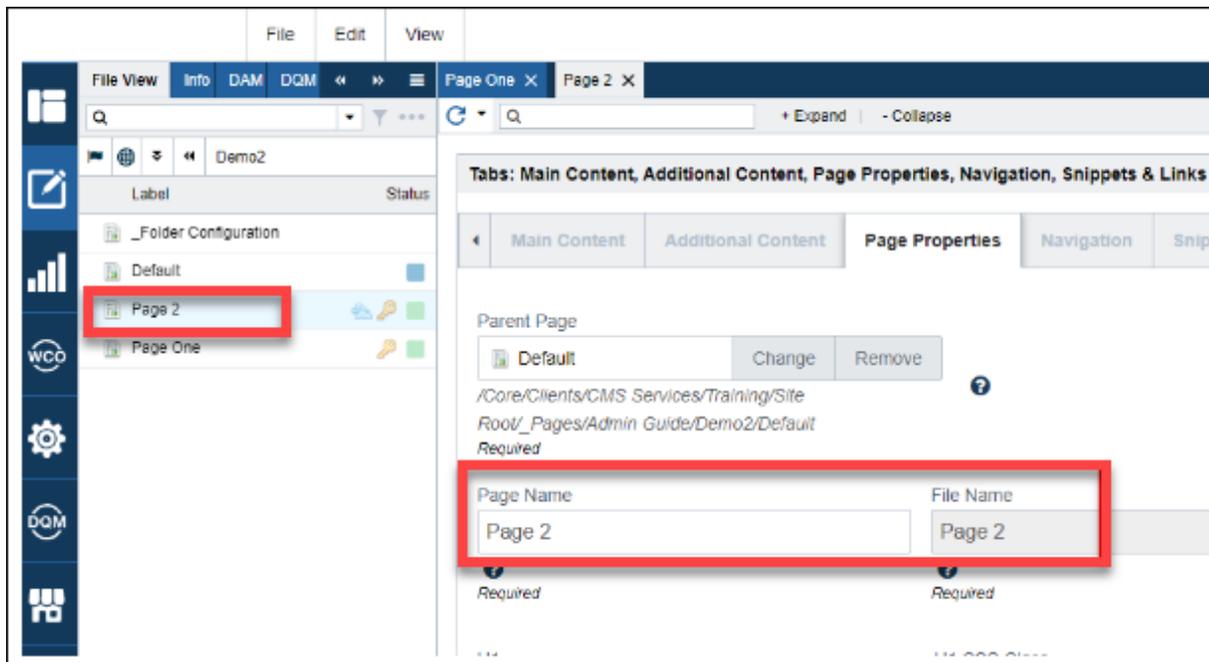


### Consequences of not following the renaming procedure

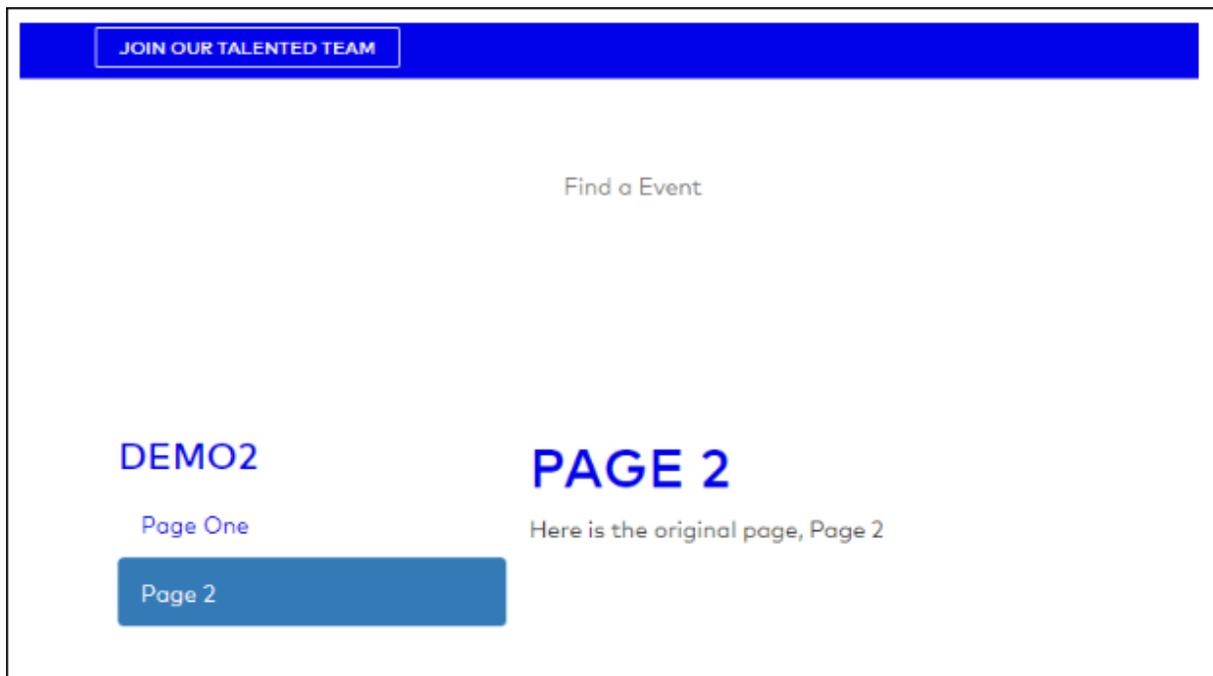
If you don't rename the **File Name** in Page Properties according to the procedure, to match the new URL, this page will revert back to the original name and last saved content as it existed under that original name, once **Save** is pressed again.

For example, let's say the original page was named **Page 2** and we rename it to **Page Two**.

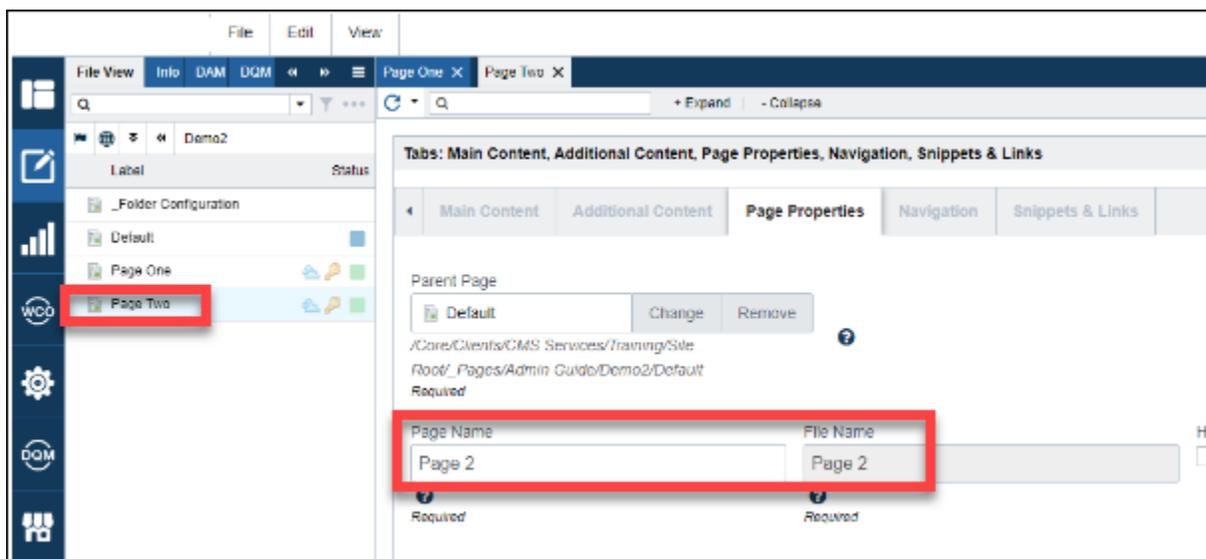
Prior to the change, the screens look like this:



On front end, URL is <https://stage-training-ih-ih.cphostaccess.com/admin-guide/demo2/page-2>



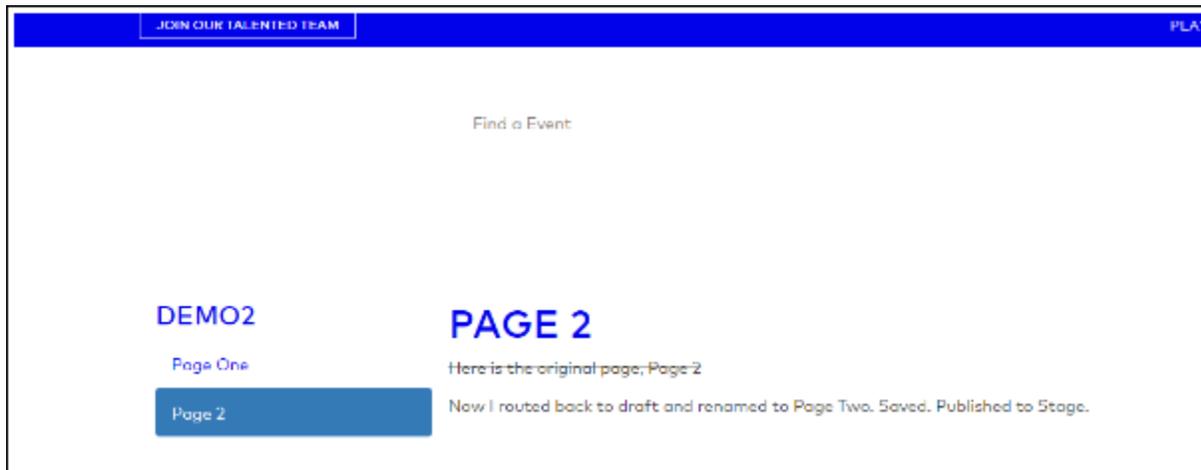
After renaming the page from Page 2 to Page Two, let's say we do NOT update the Page Properties to match.



On front end, URL is updated to be:

<https://stage-training-ih-ih.cphostaccess.com/admin-guide/demo2/page-two>

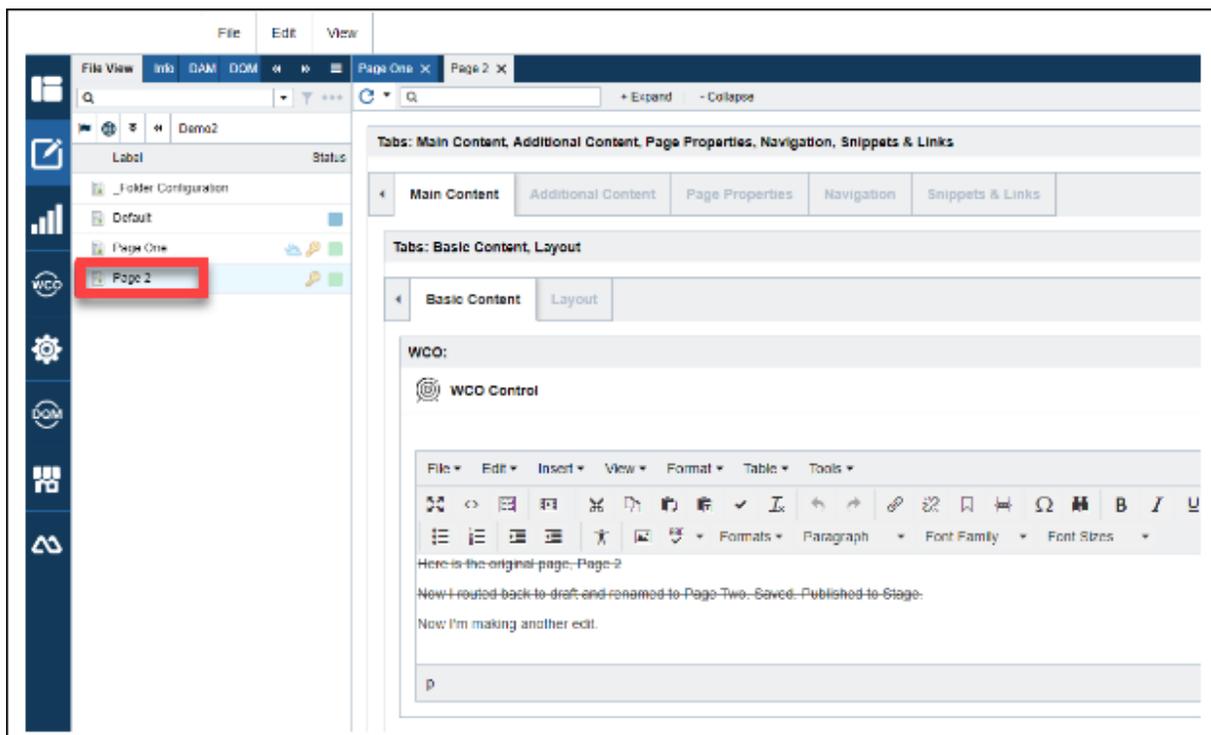
And the front end of the page still shows 'Page 2' the H1, left nav (and breadcrumbs, if enabled) since 'Page Name' was not changed.



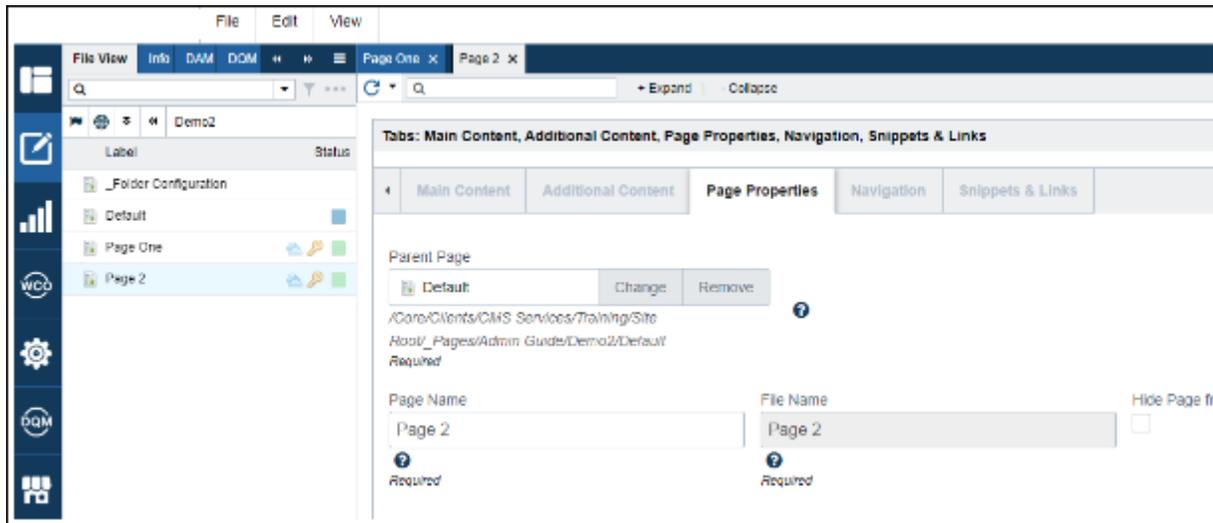
Now we go back to the page and make another random edit to the page and click **Save**.

In our example, in the WYSIWYG editor, we have original text ('Here is the original page, Page 2') that is struck out and replaced with new text.

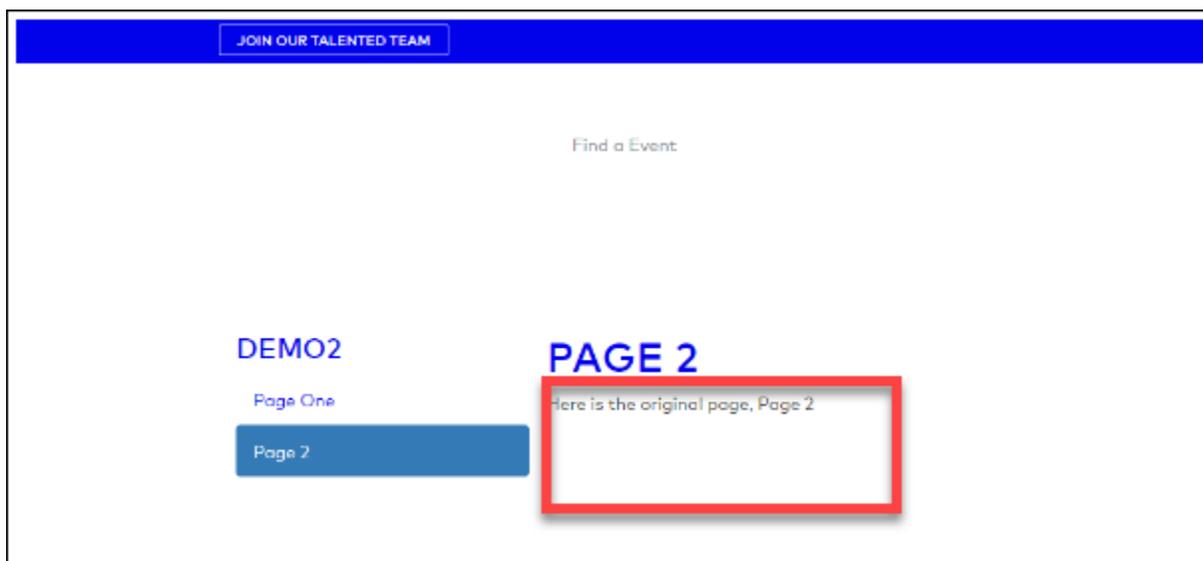
After clicking Save, you will see in the left nav of the CMS that 'Page Two' reverted back to 'Page 2', indicating the File Name has reverted back to the original name and the URL is back to **/page-2**.



Redeploy to stage to publish your new changes. Return to Page Properties to see all the current settings.

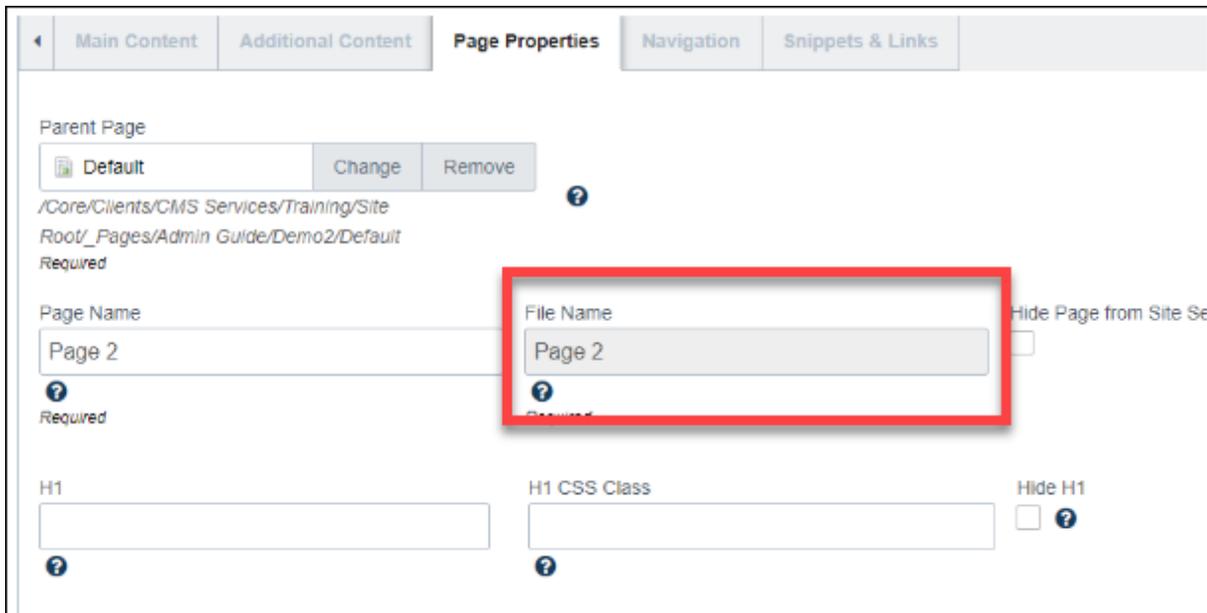
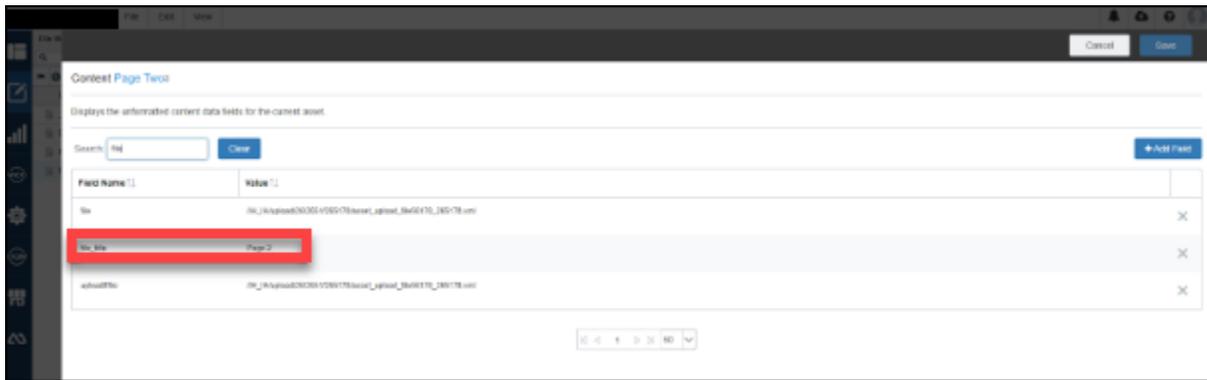


The entire file reverts back to the original version (as seen by the content body missing the last 2 edits). Why did this happen? Because you didn't change the filename to match the new URL name.



Technically, the reason the name in the left nav reverts is because it is pulling from 'file-title'..

**File-title** as it is known in Content properties (aka File Name from the properties tab) is not directly editable from the Page Properties tab.



The only way to change that property and make it 'stick' is by editing the file-title through Content properties as described in the procedure.

If you skip this step, the CMS will look for and find a file with the name stored in 'file-title' (i.e. page 2 in our example) and present that page as it existed the last time it was saved with that name.

The bottom line is, if you don't update the filename to match the new URL, any edits made under the new name will be lost once the file is saved the next time.

### Alternatives to Renaming Folder

Renaming a folder is more complicated. Renaming folders breaks the navigation inheritance on every page living within that folder AND in any subfolders below it. If a folder is renamed, all those pages must have their navigation manually reset.

There are many reasons one may wish to rename a file or folder. If your goal for renaming the page is to change the URL, consider creating a custom publishing package as an alternative to renaming.

This is especially beneficial if you have numerous pages whose navigation will be impacted as a result of changing the folder name. In this case, creating a custom publishing package is the more efficient way to achieve the goal of changing the URL. It is a simple change to the publishing path in the publishing properties section, which changes the URL path name and bypasses the need to manually fix the navigation on all pages below that folder.

### Create a custom publishing package to change URL

Here you can simply change the publishing path in the publishing properties section, which changes the URL path name.

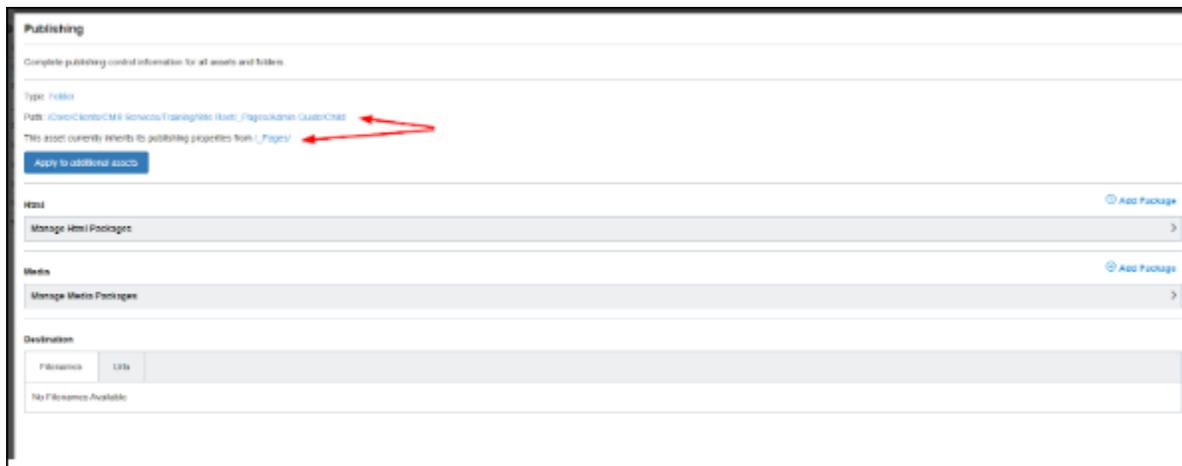
Let's use the following example. Say we have a folder structure of files like this: Admin Guide/Child that we want the URL to be Admin Guide/Children.

Follow this procedure to change a URL without having to rename the folder:

1. Route all files in that folder (pages, subfolders and pages within subfolders) to Draft. This removes these assets from the server so they are no longer accessible at that wrong URL, thus can no longer be accessed in the future.
2. In the left nav, click the folder that should have an alternate URL to highlight it to set focus.
3. Click **Publishing** on the right hand side of screen under Properties to create a new custom publishing package for this folder.



4. From here you can change the URL path name.

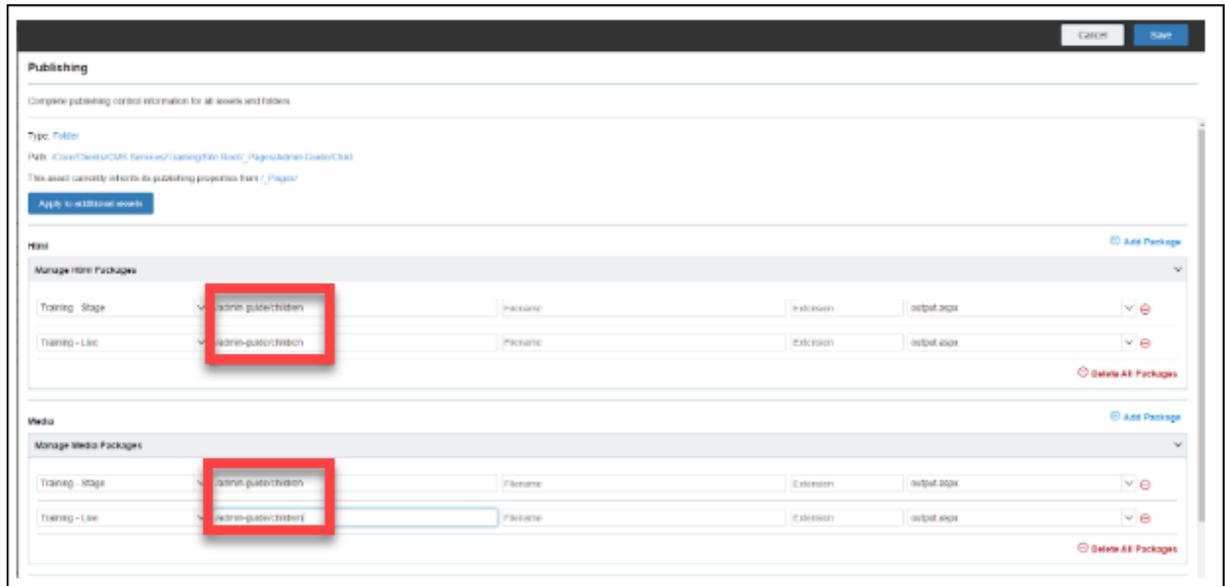


5. Notice the folder to which the publishing package will be applied is:  
Path: **/Core/Clients/CMS Services/Training/Site Root/\_Pages/Admin Guide/Child**

Notice the publishing package typically inherits from **/\_Pages/**  
**This asset currently inherits its publishing properties from /\_Pages/**

We want to change the URL from Admin Guide/Child to Admin Guide/Children, To do this:

6. Click **Manage HTML Packages**.
  - a. Next to both stage and live enter **/Admin Guide/Children**  
 The starting point for this input value is Root, so put the full path. (using our example **/admin-guide/children** not **/children**)



7. Repeat for **Manage Media Packages**.
8. Click **Save**.

Now these new settings now override the original built-in inheritance from the **\_Pages** folder and will build the URL for pages in this folder's tree as **/admin-guide/children/...**

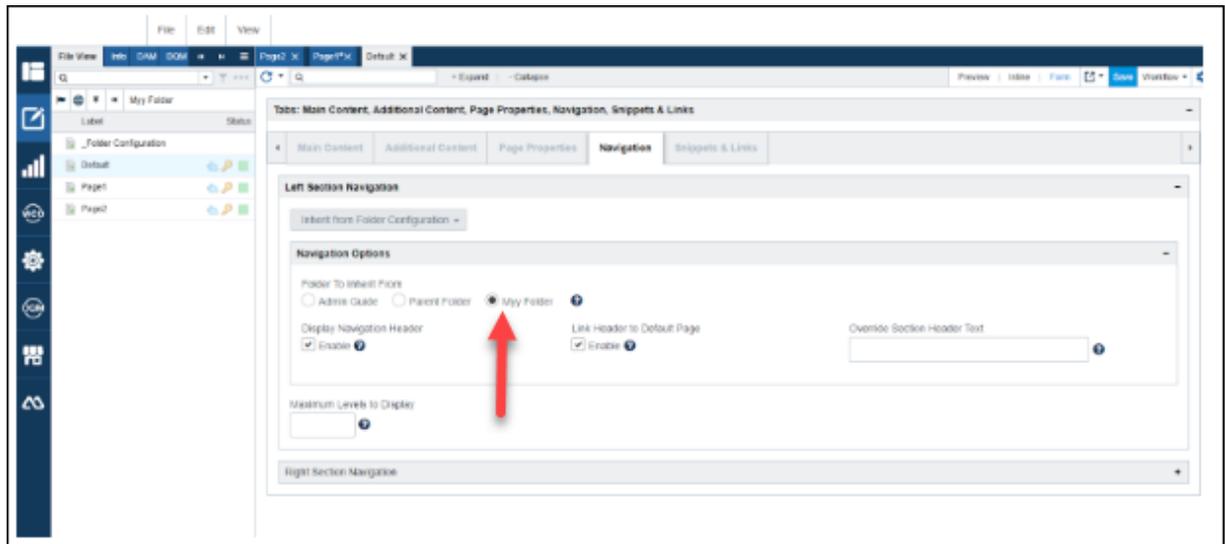
The downside to using the above option is that the left nav still says 'child', while the URL says 'children'. If you don't know to look at the publishing package, it may be confusing why the URL is 'children' not 'child'. To change the left nav to match the expected publishing of the URL, you will need to rename the folder using the instructions below.

### Renaming a folder

For this example, let's say I have a folder named 'My Folder' with pages beneath it that have been published. Obviously I mis-spelled 'My' and wanted to correct the error by renaming the folder.

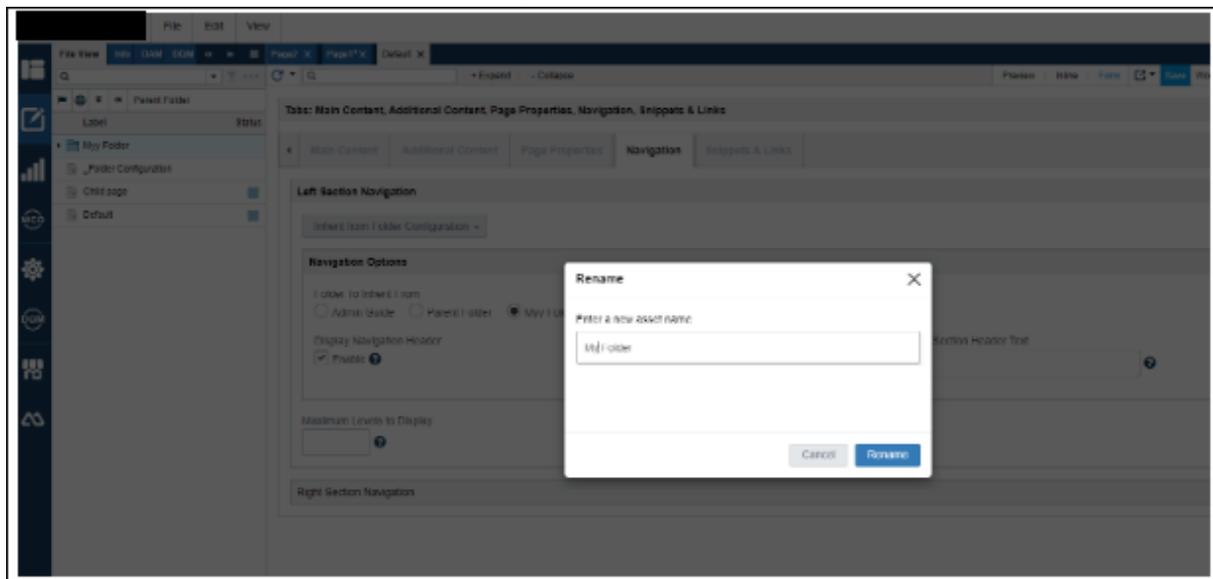
The problem in renaming a folder is that inherited navigation will break for any pages that exist within that folder and below, as I will point out in the procedure below.

Prior to making any changes, notice the **My Folder** radio button is selected, showing where the page is inheriting navigation from.

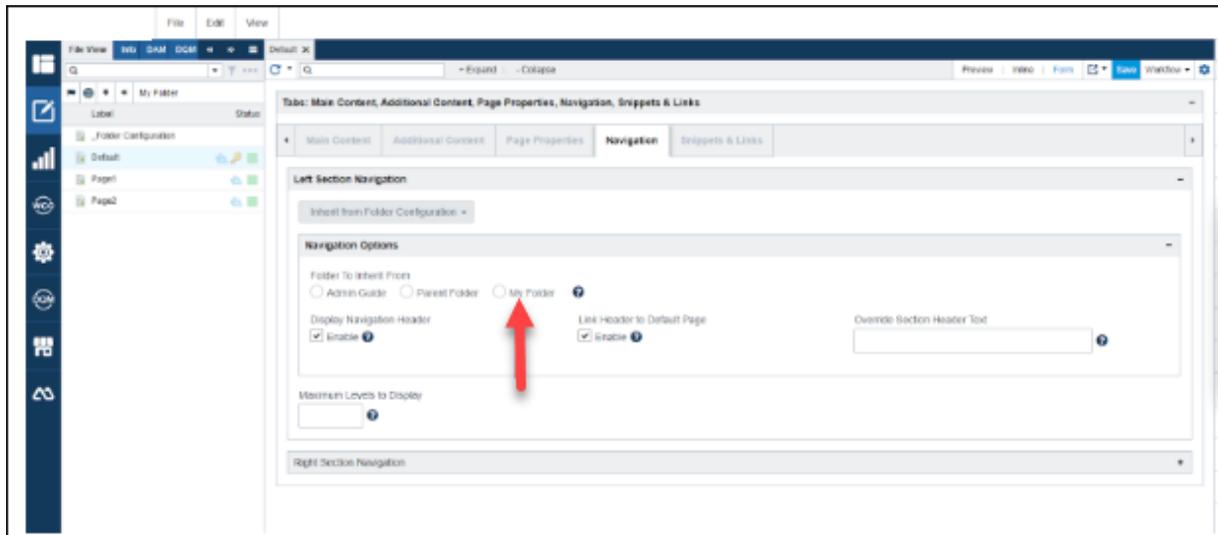


**Procedure for renaming a folder:**

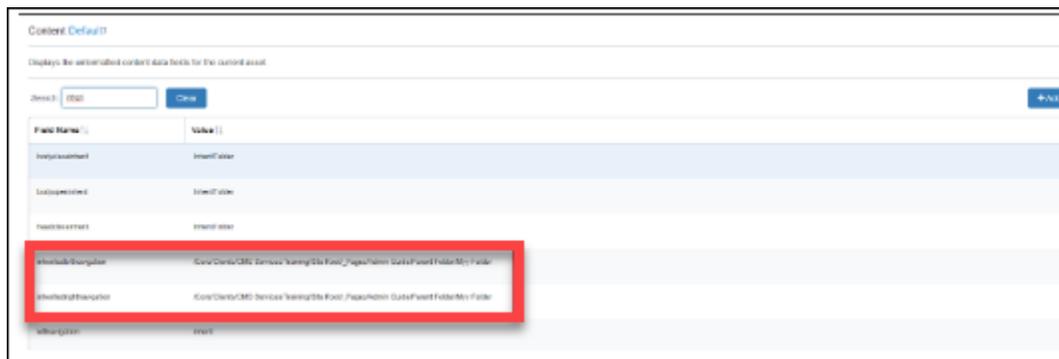
1. Route all assets to Draft that exist in that folder and below. (to keep the old URL from being accessible in the future).
2. Click the folder name, right click, click **Rename**
3. Enter the new name of the folder – My Folder



4. Route all assets back to Stage or Live.
5. Now go back to the **Navigation** tab. You will now see the default Navigation is unchecked. So, this means now all the pages on this level and below will need their navigation rechecked manually.



This is because what it thinks it has as inheritance, not longer exists (i.e. My Folder). This is seen by navigating to **Content Properties** and searching for 'inherit'



The downside to doing it this way (renaming a folder) is that for every page that previously existed under the old folder structure, will now have to be manually rechecked using the radio button for the newly named folder.

However, any pages created going forward will be fine and automatically inherit the newly named folder navigation.

## Deleting pages

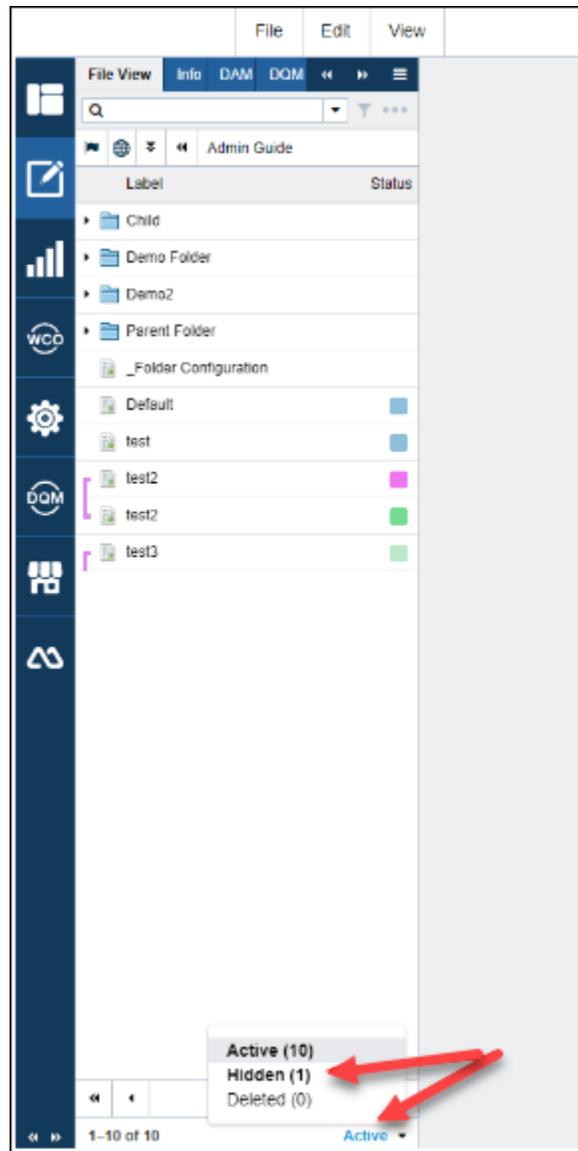
**99.99% of the time you should NOT delete a file.** What you need to do is remove the file from the server and archive it. Reserve the use of deleting a page to those files that were created inadvertently and have never been published. Everything else should be handled by **Retiring** and **Archiving**.

The only time you ever want to delete a page is if it is in Draft and has NEVER been published before. In this case it is ok to right click on the file and select **Delete**.

**For any other reason, it is best practice to never delete a file or folder.**

Pieces of the file/folder remain at the server level that can cause problems in the future, especially if you try to reuse the same name.

Rather than deleting, you should use the workflow to advance the file/folder to a **Retired** or **Archived** state. When you Archive a file, it is removed from view and stays hidden forever from the Active files. To view Archived files, go to the bottom of the left nav, click the drop down arrow next to **Active** and select **Hidden**. This will present a new view of the left nav with only the archived files. If after considering the advice above, you absolutely must delete a file, you must first send it through the workflow to at least Retired (preferably Archived) prior to deleting to ensure there are no unintended consequences in the future from deleting the file.



Follow this procedure for deleting Files (pages). **Deleting a folder** requires a ticket!

#### To delete a file/page:

1. Select the file you wish to delete.
2. Route to **Retired**.

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- a. Right click the file.
  - b. Click **Route**.
  - c. Click **Retired**.
3. Route to **Deleted**.
- a. Click **Route** again.
  - b. Select **Delete**.

Once the file has been deleted, it will be permanently deleted from the system in 2–4 weeks.

### To delete a folder

If you need to delete a folder, please submit a support ticket through the WebMD Ignite Help Center

We have to engage our CMS partner, Crownpeak, to remove files from the server.

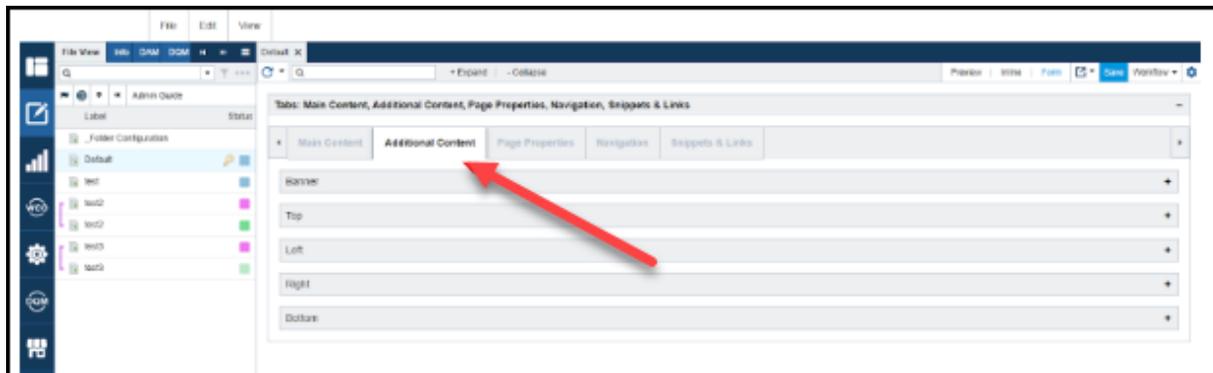
When you right click on a file and select **Delete**, it does not delete it from the server. It only places the folder and its contents in the deleted folder. (as opposed to when you send files through the Archive and Deleted process, that file is actually removed from the server).

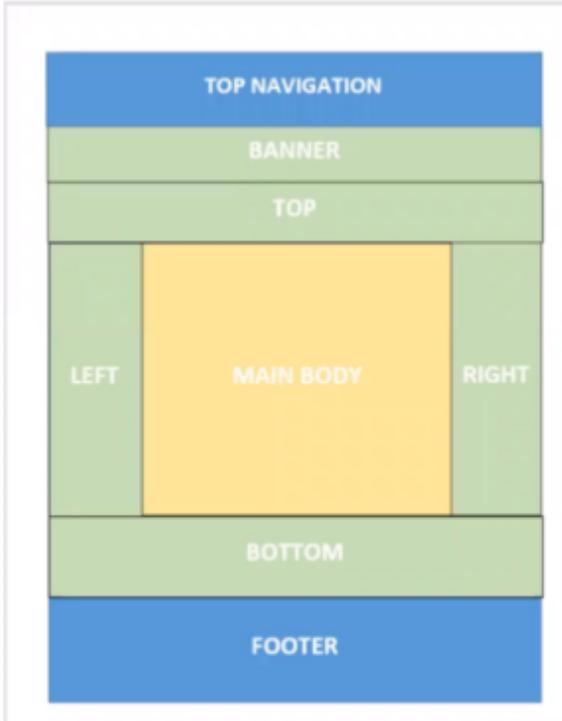
Please note: Deleting a file (page) from the server does not delete its parent folder from the server. When any page is published, its folder is also published to the server. When you use the workflow to send files through the Archive and Delete process, the file is removed from the server, however, the file path for the folder will actually remain. If you want that folder to be deleted, you must submit a support ticket.

Normally the reason this situation presents itself is when a user renames a folder, then they republish all the pages in that folder, but they did not send all the pages in that folder to Archive before doing so. This causes the page to be out there at 2 separate URLs.

### Additional content

Use the **Additional Content** tab to target specific parts of the page for adding additional content.



Page Anatomy	CMS Form View														
	<table border="1" data-bbox="802 352 1369 846"> <thead> <tr> <th>Page Anatomy</th> <th>CMS Form Control</th> </tr> </thead> <tbody> <tr> <td>Main Body</td> <td>Main Content tab</td> </tr> <tr> <td>Banner</td> <td>Additional Content tab, Banner</td> </tr> <tr> <td>Top</td> <td>Additional Content tab, Top</td> </tr> <tr> <td>Left</td> <td>Additional Content tab, Left</td> </tr> <tr> <td>Right</td> <td>Additional Content tab, Right</td> </tr> <tr> <td>Bottom</td> <td>Additional Content tab, Bottom</td> </tr> </tbody> </table> <p data-bbox="802 888 1357 1052"><i>Top Navigation and Footer configuration settings are found by navigating to <a href="#">_Configuration</a> <a href="#">_Navigation Configuration</a> see <a href="#">Header &amp; Footer</a> tabs</i></p>	Page Anatomy	CMS Form Control	Main Body	Main Content tab	Banner	Additional Content tab, Banner	Top	Additional Content tab, Top	Left	Additional Content tab, Left	Right	Additional Content tab, Right	Bottom	Additional Content tab, Bottom
Page Anatomy	CMS Form Control														
Main Body	Main Content tab														
Banner	Additional Content tab, Banner														
Top	Additional Content tab, Top														
Left	Additional Content tab, Left														
Right	Additional Content tab, Right														
Bottom	Additional Content tab, Bottom														

Each section in the Additional Content tab, has contextual options that apply.

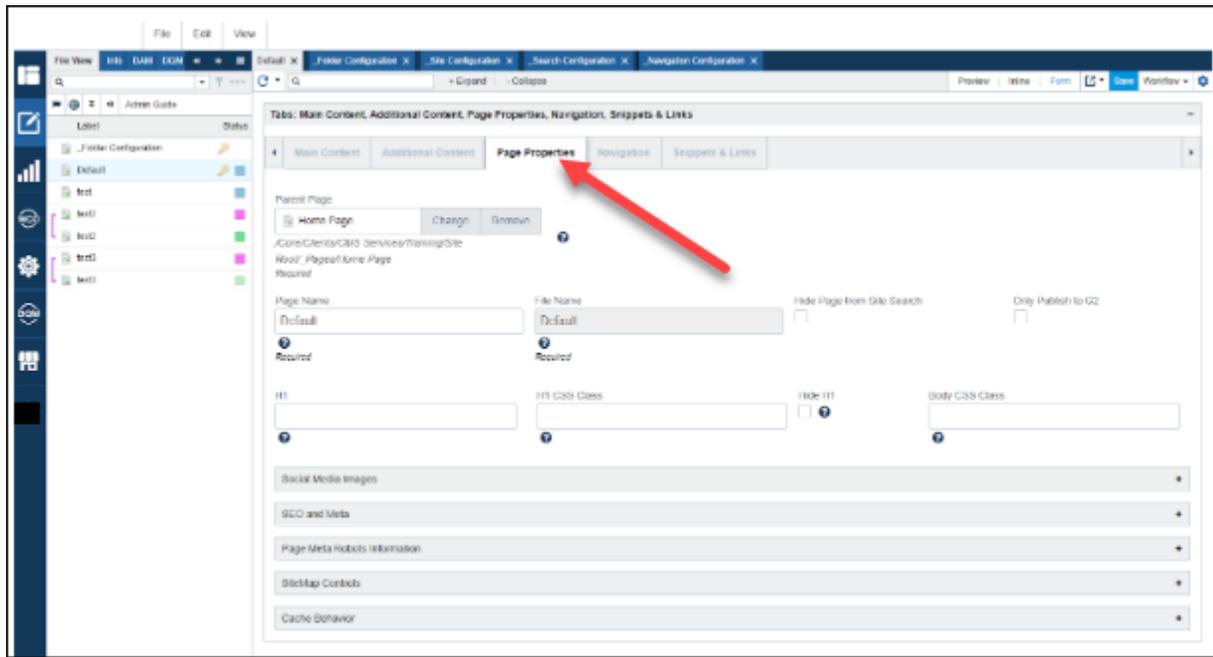
The default setting for each of these is:

- **Inherit Folder Configuration [Banner or Content] Settings**
- **Inherit Folder Configuration Content Settings:** Uses content set in the folder configuration. If the folder configuration is also set to inherit, then site configuration content will be displayed for this section.

This architecture allows you to configure settings at the page level, folder level or site level.

### Page properties

Use the Page Properties tab to configure additional details about the page.



### Parent Page

Select a parent page that will be used to build hierarchical data for breadcrumbs and the site map. The default setting is the Default page of the current folder. Changing this value to manipulate how the breadcrumbs display. For example, by selecting a different parent page, it will change the breadcrumbs to reflect the new parent.

### Page Name

The page name will be used for display in the breadcrumb, default H1 value and the dynamic left/right page navigation.

Page name inherits from filename.

A good use case for changing the Page Name is when setting up clinical trials pages. A user may want to keep the filename of the page short, so they create the page using its clinical trial ID as a filename, like 'CT1234-5'. But they want to use a more descriptive name for the breadcrumbs and H1, so they would change the **Page Name** from 'CT1234-5' to 'A study of cancer in rats'. Now the left nav in the CMS will display as CT1234-5 and the left nav, breadcrumbs and H1 on the webpage will display as 'A study of cancer in rats'.

### File Name

This will be used for the page file name and will be used in the page URL. This field cannot be modified once the page is saved

### Hide Page from Site Search (checkbox)

Check this box to hide the page from the website's built-in site search. It DOES NOT hide the page from Google. (Use no index, no follow for that)

### Only Publish to G2

Checking this box means the asset will only publish to G2. Meaning it will not publish as a regular content page would and will not have a corresponding URL.

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This is used primarily for **Alerts**. Alerts are created as regular content pages. We do not, however, want the alert to display as normal content pages nor do we want it to be discoverable by itself. An Alert's purpose is to be consumed by other content pages and displayed as part of the consuming page. Technically this is achieved by querying the asset using G2 and generally done through custom lists. So, by checking this box, it enables the CMS to read and display the alert as part of other pages, but it will not display the alert as a published URL. Since it is not published as a URL the alert content page will not be discoverable in site search nor will it show up as a stand alone page.

## H1

H1 inherits from Page Name, by default. Enter a value here to override the value set in the Page Name field.

## H1 CSS Class

Value of the H1 tag's class attribute. Use this to apply a different style to the H1 content.

## Hide H1

If an H1 will be added within the body content, check this box to prevent the automatic H1 from rendering above the body content. This is often checked when using custom content and the H1 is rendered as part of the custom content widget.

## Body CSS Class

Value of the body tag's class attribute. This is used to scope CSS to that particular page.

The following are additional sections included in the **Page Properties** tab.

- Social Media Images
- SEO and Meta
- Page Meta Robots Information
- SiteMap Controls
- Cache Behavior

## Social Media Images

This section allows you to configure your social media shares with a particular image of your choosing. If not specified here, Facebook (or other social media platform) will randomly pick an image to display when the page is shared..

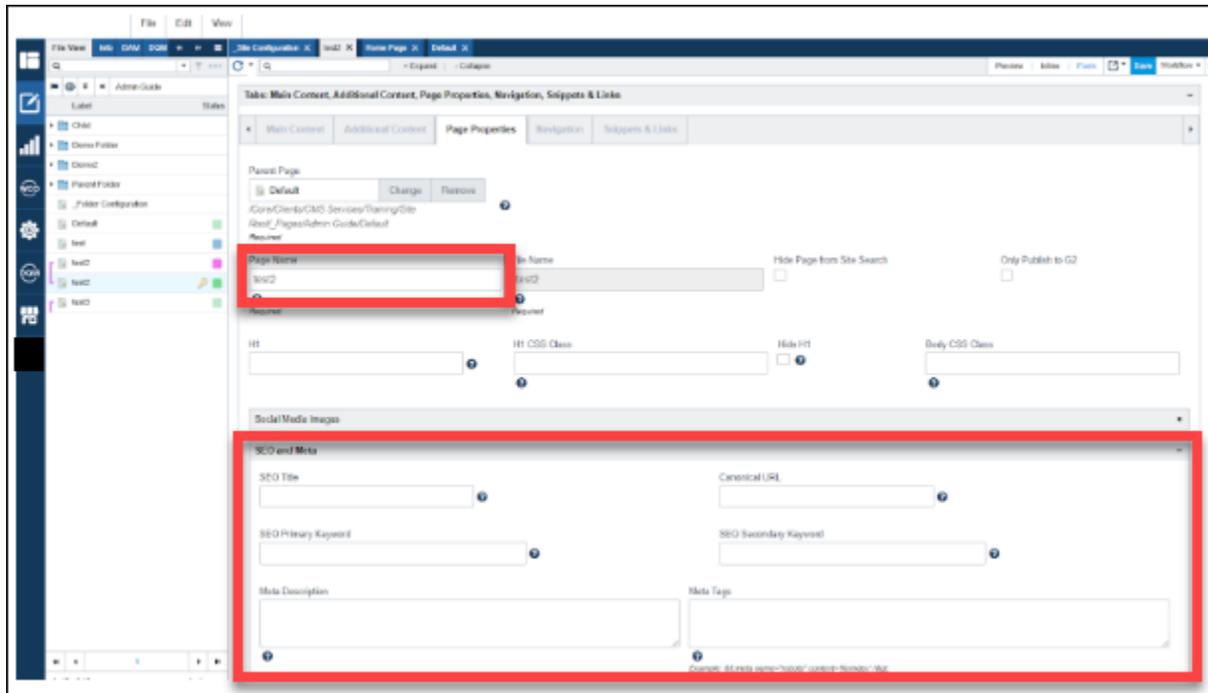
## Managing SEO

The CMS will not leave a page without SEO data, whether it is explicitly provided by the client or not. Here are the possible ways SEO data is created...

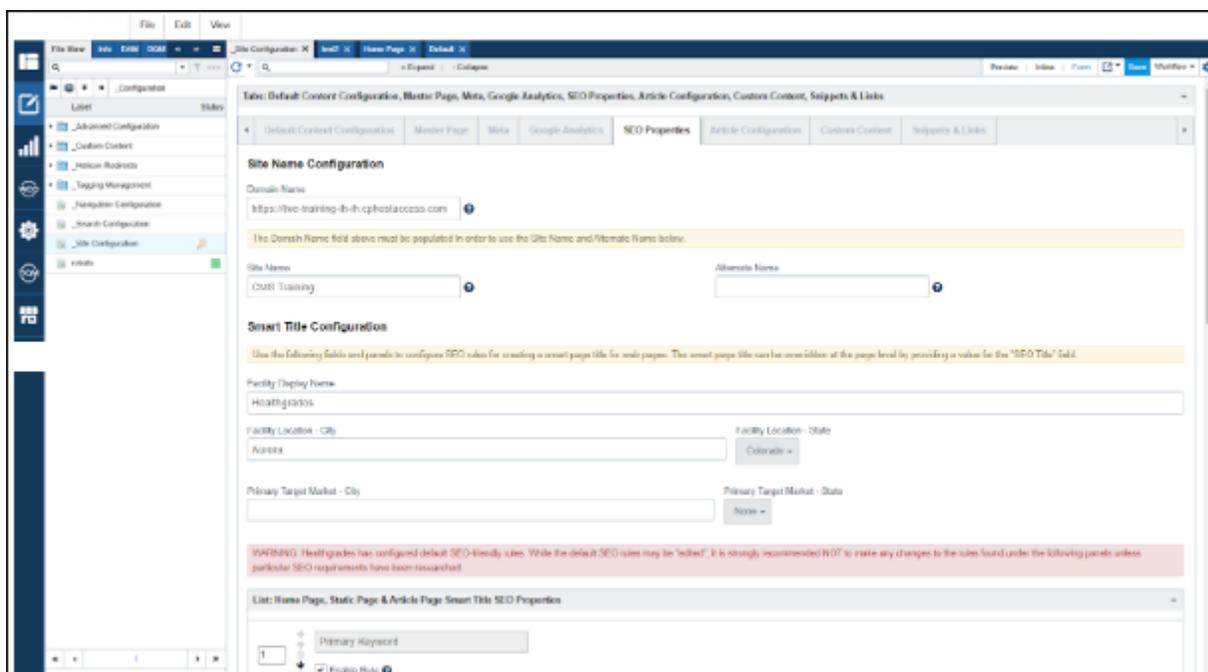
1. The user explicitly provides the SEO data to be used.
  - a. Provided as the **SEO Title** within the Page Properties tab (Recommended)  
OR
  - b. Provided as the **SEO Primary Keyword** and **SEO Secondary Keyword** in Page Properties (NOT recommended)

2. When the user does not explicitly provide SEO data, the CMS programmatically builds SEO data based on the page name and predefined configuration settings in **\_Site Configuration > SEO Properties** tab.
3. Content App widgets can optionally be used to override a page's SEO settings.

### SEO fields used from Page Properties



### SEO fields used from **\_Site Configuration**



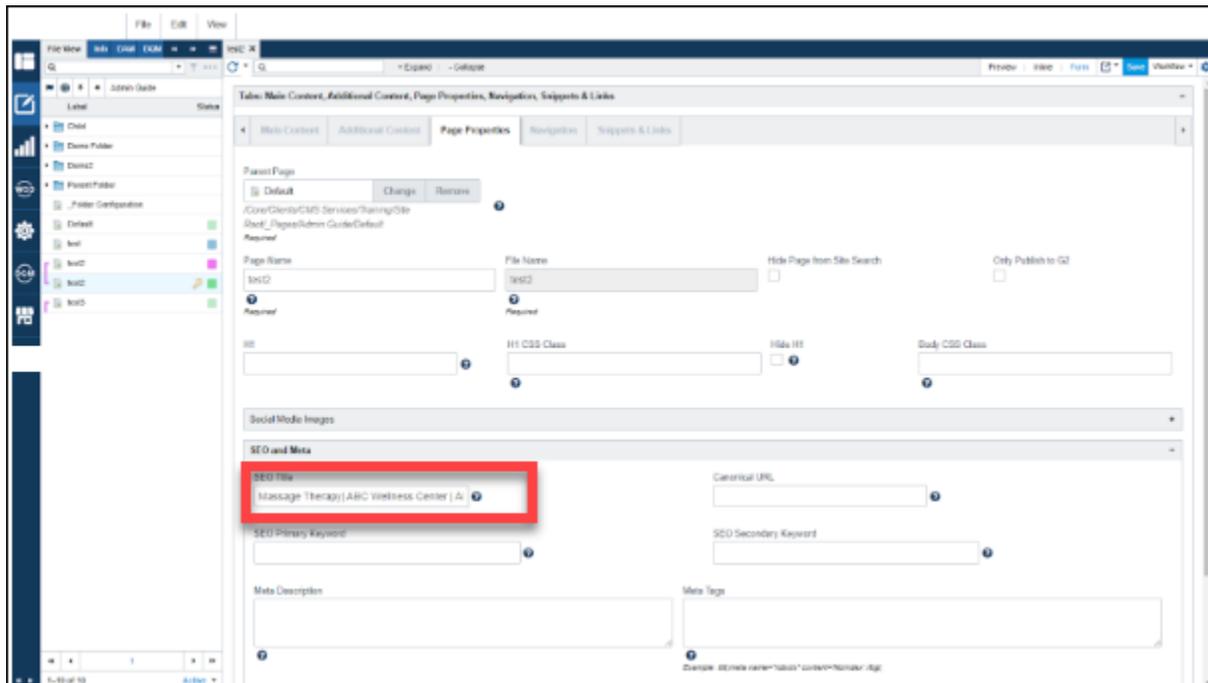
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See each section below for more information on how the CMS generates the data:

- SEO Title
- SEO Title tags display in the Browser tab and on Search Engine Results pages. (SERP).
- SEO Title can be explicitly entered in **SEO Title** as shown below.

When **SEO Title** is provided, **SEO Primary Keyword** and **SEO Secondary Keyword**, don't have any relevance and are not used in building SEO data. So, just leave them blank.

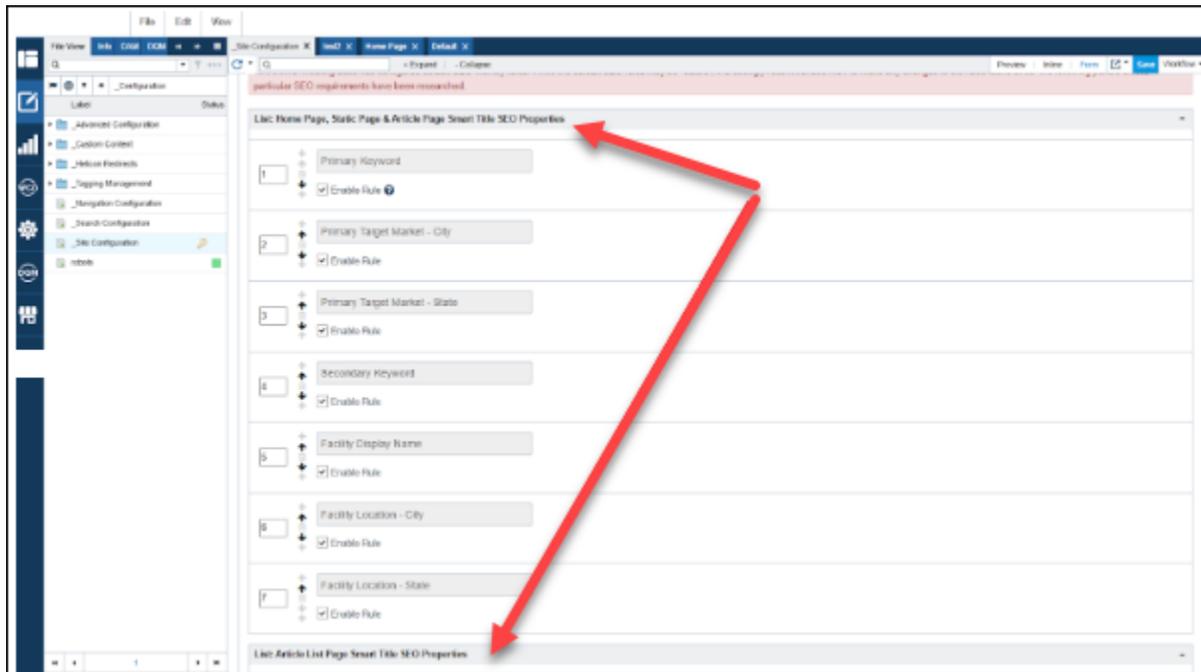


If a value is provided for **SEO Title**, the CMS will generate SEO data as:

- The value provided in **SEO Title** plus the domain name
- The string built is
  - [SEO Title] [domain name]
  - example...  
 Massage Therapy | ABC Wellness Center | ABC Hospital  
 abchospital.com

If a value is NOT provided for **SEO Title**, the CMS will generate SEO data as

- The value of **Page Name** (in Page Properties) plus other values taken from **\_Site Configuration > SEO Properties**, as defined in the **Smart Title Configuration** section
- The exact string built is determined by the configuration settings under **Smart Title Configuration** as shown below. These settings are customizable for each client.



- Generally speaking, the string ends up looking something like this
  - [Page Name] [Facility Location-City] [Facility Location-State] [Facility Display Name] domain name
  - example...  
Heart Care Aurora, CO ,  
ABC Hospital  
abchospital.org

### SEO Primary Keyword and SEO Secondary Keyword

Keywords are no longer trackable in today's world like they used to be. So, rather than using these keyword fields, it is best practice to simply provide a value in SEO Title and leave the rest of the fields in this section blank. When SEO Title is provided, Primary and Secondary keywords don't have any relevance and are ignored by the CMS in terms of building SEO data. If used without SEO Title, SEO data is built following the Smart Title Configuration section as shown above.

### Meta Description

If meta description is not given in Page Properties, the CMS will grab the first 160 characters of content in the body content. Otherwise it will use whatever value is entered in this field.

### Canonical URL

Providing a canonical URL is a way of telling search engines that a specific URL represents the master copy of a page. So, if this page is accessed by various URLs, specify here the preferred URL that search engines should crawl. Providing a canonical URL keeps your site's SEO strong and prevents your site from being penalized by search engines for duplicate content.

Another similar use case is if this page's content is a duplicate of other pages (or even similar), such as a cardiology page that appears on multiple subsites, you can specify the original source page here. This

indicates to Google that you know this is duplicate content and the source page Google should use is listed here.

### Meta Tags

We generally do not recommend using this field. However, if you have specific meta tags you want to push into the site, you can use this field as long as you enter properly formed meta tags using valid HTML markup. Improperly formed meta tags will be output to the HTML and will break the page.

For example, it should look something like:

```
<meta tag="keywords" value="clinical trial, atrial fibrillation, men over 50, Dr. John Smith">
```

Do not do it like this:

```
keywords='john smith, dave jones, atrial fibrillation'
```

### Hide From Search

If you want to make 100% sure Google will not find your page, do this...in Page Properties

- Check - Hide from site search
- Select Robots Option - noindex, no follow
- Check - Exclude from XML Sitemap (see below)
- Check - Exclude from Sitemap Page (see below)

### Page level controls for hiding

- Page Properties tab > Page Meta Robots Information
- By selecting a Robots Option (no index, no follow etc) from here, the CMS properly configures the page's html settings without having to specify this within the Meta Tags section of Page Properties. Setting it this way reduces the chances of breaking the page by entering improperly formatted syntax..

### Folder level controls for hiding

- You can also control the robots at the folder level.
- Do this by selecting \_Folder Configuration for the desired folder > Meta tab > Select Robots Option

These are the commands that can be given to search engines.

- Index means search engines should show this page in search results..
- Follow means search engines spiders should follow links contained on this page.
- No index means search engines should not show this page in search results.
- No follow means search engines spiders should not follow any links contained on this page for any purpose.

## SiteMap Controls



The first option, **Check to exclude this page from XML Sitemap** - controls whether the page is included on the search engine readable sitemap.

The second option, **Check to exclude this page from Sitemap page** - controls whether the page is included on the human readable sitemap.

### Priority

Set only if you wish to overwrite default settings. I would indicate that this is the most important page on your site. This setting may or may not have any impact either way because Google uses its own search budget settings in determining how often a site is crawled..

### Change Frequency

Similar to Priority in terms of real impact to SEO. This is where you would indicate how often the page is updated. Again, just because you provide this info, doesn't mean Google will check the page accordingly.

### Cache Behavior

Contact the Services team at WebMD Ignite if you wish to enable CDN and use this feature.

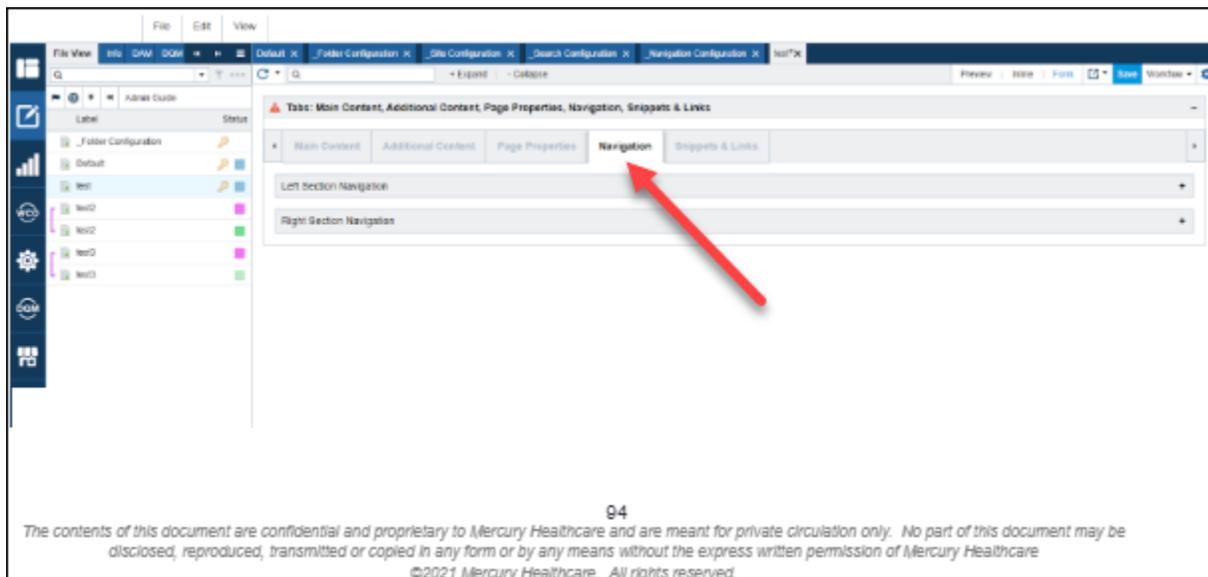
This is related to the CDN. If you have this enabled on your site, you can override the default settings of caching of your pages, which is usually about 5 minutes, using these controls.

Cache Control Type = private means your site will never be cached.

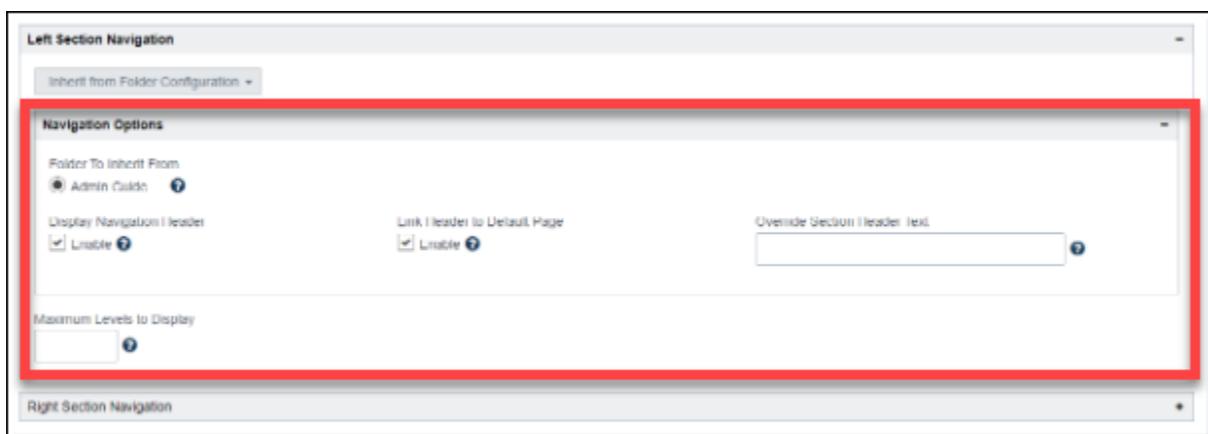
Alternatively if your web config is set to private and you want this page to be cached, set it to public here.

### Navigation

Use the **Navigation** tab to configure navigation details about the page.

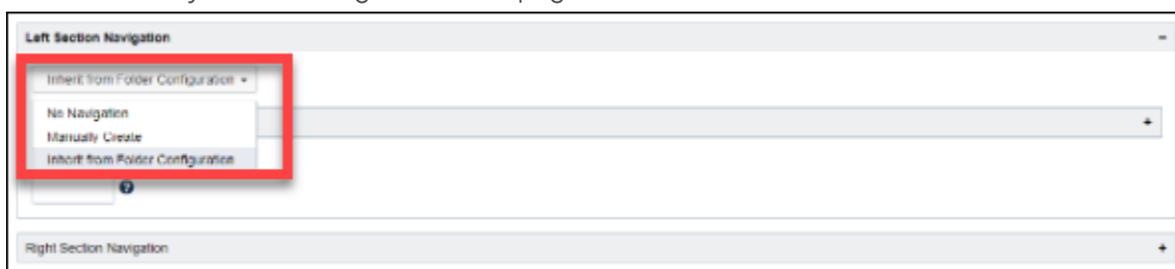


By default, both the left and right navigation sections are set to inherit from folder configuration. By default the CMS will automatically build navigation paths that reflect the file structure. You can further fine tune these settings with additional **Navigation Options** shown below.



If you want to deviate from the default setting, here are the options, as shown below:

- Display no navigation
- Manually create a navigation for the page



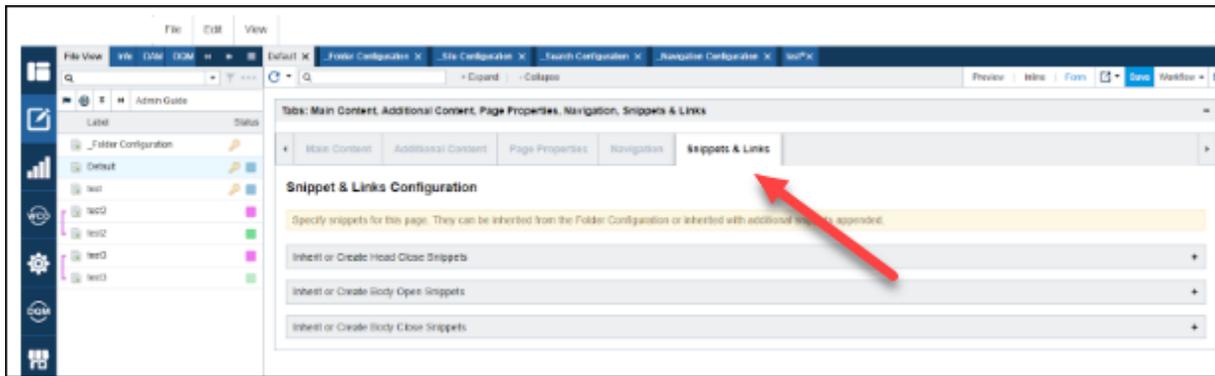
## Snippets & Links

Use the **Snippets & Links** tab to add additional scripts/code to the page.

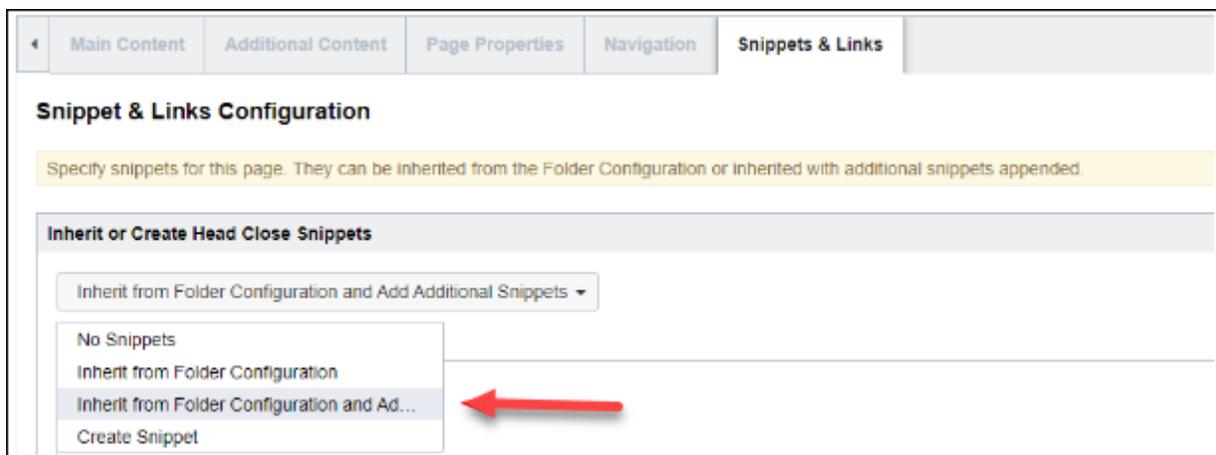
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This section offers the ability to inherit settings from folder configuration with additional snippets appended, which is useful for controlling behaviors on the page level while maintaining consistency with other pages.



## Custom Content

Custom Content is a CMS feature that allows you to repeatedly use various content templates across your site in a user-friendly way. Examples of these would be Blog or News pages that you want to have the same layout for. Another example would be if you want to have various content always output in a pretty looking card. The following section will show you how to create, configure, and leverage Custom Content on your site.

### Custom Content terms and definitions

Below is a list of the various terms and definitions you will come across in this section. This is a very brief intro to the terms. There will be more detail, further in the guide.

#### Content Type

A Content Type is the term that describes a created data collection. You can think of your out-of-the-box data Content Apps, ie. Providers, Locations, and Events, as three different Content Types or data collections. Each collection then has several entries. Each entry has a defined template of fields, ie. First Name, Primary Specialty, About Me, etc. In the case of a Custom Content Type, data entries are called Content Pages, and the fields are called Custom Fields.

## Custom Fields

CMS allows you to create Custom Fields that can then be assigned to a Content Type's Template. This is done in the Content Type's `_Content Type Configuration`.

## Template

In the CMS, you can set a list of predefined Custom Fields as a template for your Content Type. This curated list of fields will be available, whenever a Custom Content Widget or Content Page of a particular Content Type is created. For example, every time you create a new Provider, you have a given list, or Template, of fields, ie. First Name, Primary Specialty, About Me, etc.

## Content Page

You create a Content Page, just like a Static Page. However, with Content Pages, you will select a Content Type from a drop down, and then be given a Template of curated fields to populate. Think of Content Pages as, first and foremost, data entries, which CAN be front end pages, if so desired. The data from these pages can be pulled and outputted on a Static Page via a Custom List Widget.

## Custom Content Widget

A Custom Content Widget is used to create an html representation of a single data entry for a particular Content Type. No Content Page is needed to build these. They are created using the set field Template of a Content Type, then outputted using the set Layout for that Content Type.

## Custom List Widget

A Custom List Widget is used to create a list of data entries for a particular content type. Content Pages are required for this kind of widget, as it will search for those pages (or data entries), and output each as an html structure dictated by a Custom List Layout.

## Layout/Custom List Layout

There are two places to set up a Content Type's layout, which is then reflected in possibly three different ways. The 'Layouts' folder for a particular Content Type is where you set up a Content Type's front end Content Page layout, and/or a Content Type's Custom Content Widget layout. The Custom List Layout section of Content Apps is where you would set up the html structure for each data entry outputting in a Custom List Widget. Confused yet? Don't worry, we'll go into more detail below.

## Creating Custom Content Types, Custom Fields & Layouts

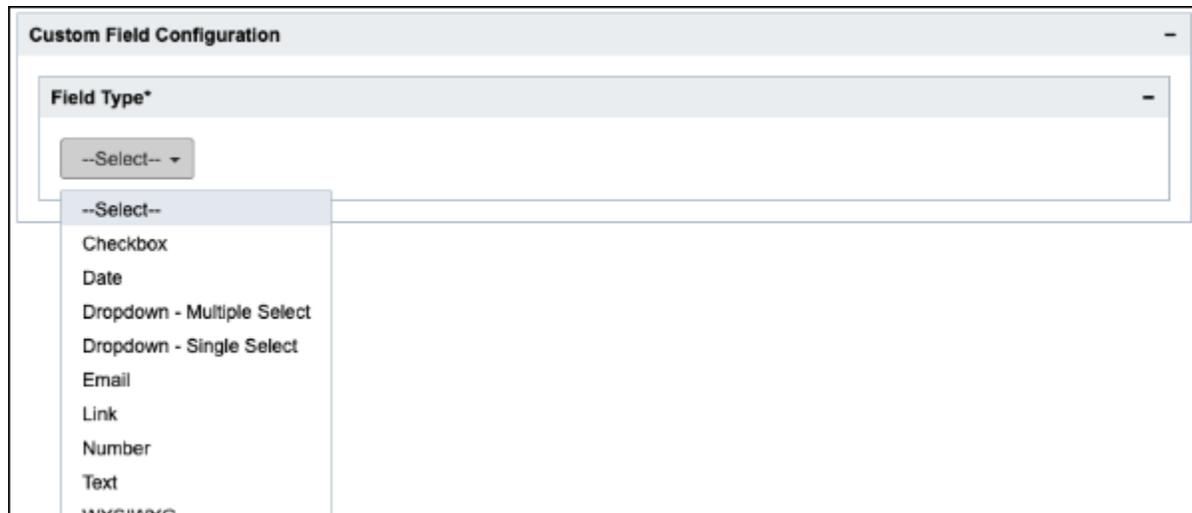
Before you can begin creating Content Pages, Custom Content Widgets, or Custom List Widgets, you have to first create and configure a Content Type. Here's how!

### Create Custom Content Type

1. Navigate to your site's 'Content Types' folder: `Site Root/_Configuration/_Custom Content/Content Types`.
2. Click **File > New > Custom Content Type**.
3. Name the Content Type and click **Create**.
4. You now have a folder with that new name. Within this folder, by default, you have a '`_Content Type Configuration`' file, as well as a 'Layouts' folder, containing a 'Default Layout' file.

## Create & Configure Custom Fields

1. Navigate to the 'Custom Fields' folder: **Site Root/\_Configuration/\_Custom Content/Custom Fields**
2. Click on **File > New > Custom Field**.
3. Name the Custom Field and click **Create**.
4. Before further configuration, you must first select a **Field Type** from the dropdown menu:



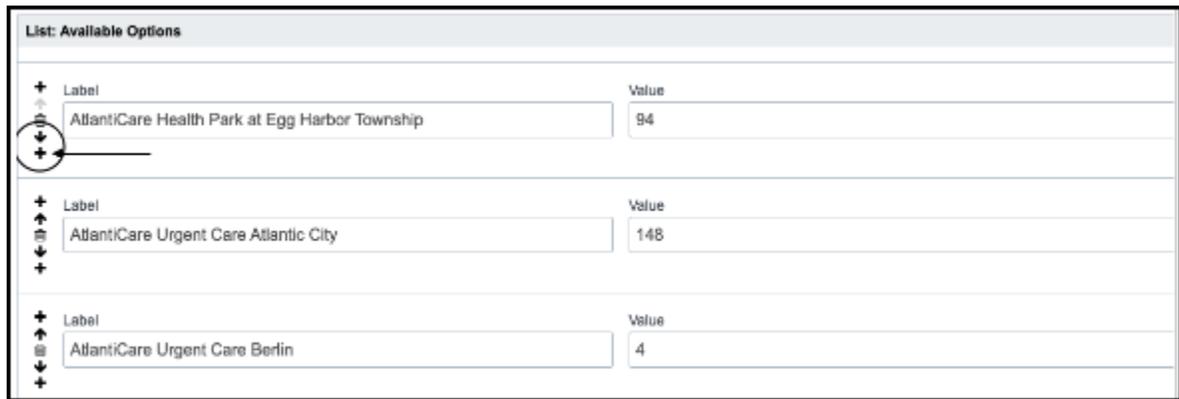
5. Now is a good time to consider what types of fields you want to create and add to your new Custom Content Type. For example, something like a Blog, would have fields like 'Story Title', 'Publish Date', 'Main Copy', 'Story Image', etc. You can create and add (instructions coming up) as many fields as you think necessary. Following is a list of Field Types and what they are typically used for:
  - a. **Checkbox** -- Used for a simple on/off toggle option. Example, you could create a 'Hide Header' field and update layout to hide/show header, depending on the field being checked/unchecked.
  - b. **Date** -- Used for any date related data. Example, 'Publish Date'.
  - c. **Dropdown - Multiple Select** -- Used to create a list of items that a User can select more than one item from. Example might be a list of categories that go with a Blog or News story.
  - d. **Dropdown - Single Select** -- Used to create a dropdown that a User can only make one selection from. Example might be a list of States, and Users can select which State a story is about or from.
  - e. **Email** -- Rarely used, but only allows email format as an entry.
  - f. **Link** -- Used to link to image assets, pdf files, other internal pages, etc. Example, a 'Blog Image' field would be a Link field type, with Image selected as the 'Link Type' (more on that below).
  - g. **Number** -- Rarely used, but only allows numbers as an entry.
  - h. **Text** -- Very common. This is used for simple text outputs. Example would be a Story Title.
  - i. **WYSIWYG** -- Also common, but is prone to break a layout, as a user is able to add inline styles, odd html structures, etc. These are harder to account for, when creating a rigid layout, but sometimes a client wishes for that flexibility.
6. There are various Configuration options available, depending on the type of field:
  - a. **'Field Label'** and/or **'Field Popup Message'** -- All field types have the option to update these.

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- b. **'Required'** checkbox. -- If checked, then it is required to update this field on every Content Page or Custom Content Widget created that is using this field.
- c. **List: Available Options** -- The 'Dropdown...' field types use this configuration option. You can add new items by clicking on the '+' symbol. There are 'Label' and 'Value' fields which can, but don't have to be, different. Example, say you have a dropdown that lets a user select a color background. You can have the Label be 'Blue', while the Value is a css hex code, ie. '#0076CF'. This allows users, who aren't familiar with css to easily pick an option, while option will output as a more usable value for developers.



List: Available Options	
Label	Value
AtlantiCare Health Park at Egg Harbor Township	94
AtlantiCare Urgent Care Atlantic City	148
AtlantiCare Urgent Care Berlin	4

- d. **Link Type** -- Available on the 'Link' field type. This allows you to select from the following options:
  - i. Image -- Links to image assets.
  - ii. Document -- Usually for pdfs, but can be used to link to any document asset.
  - iii. Audio/Video -- Links to Audio/Video assets.
  - iv. Other -- Links to internal pages.e.

e. **Maximum Length** -- For 'Text' field types. This will restrict the amount of characters a User can enter in this field. You can set this, if you don't want a user creating super long Story Titles, as an example.

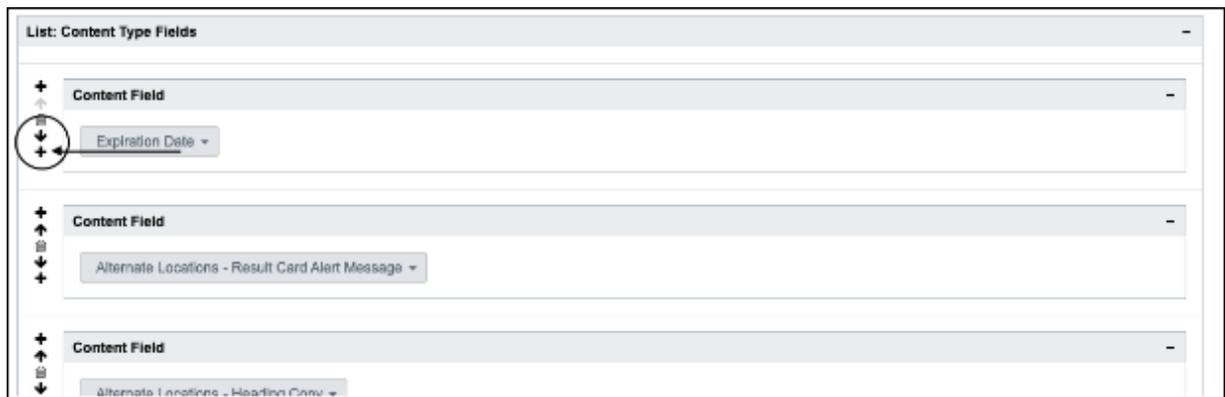
f. **Default Value** -- You can put a default value in this configuration field. If the user doesn't manually update the field in a Content Page or Custom Content Widget, it will output the default value you put here. Example, a Blog's Link Text might default to 'Read More', unless otherwise specified.

g. **Field Width/Height** -- Only applies to 'Text' field types. These two fields only affect the UI of the field template. By default, the field will output as one line, but you can set it to be higher, allowing for longer text entries to be visible to the user.

7. When you are finished configuring the field, click on the blue 'Save' button at top right, then select 'Publish' or 'RePublish' from the 'Workflow' dropdown.

### Add Custom Fields To Content Type

1. Once you have created all the necessary fields, you now will need to 'assign' them to the Content Type. Navigate to the Content Type's '\_Content Type Configuration' file: Site Root/\_Configuration/\_Custom Content/Content Types/Your New Content Type Folder/\_Content Type Configuration
2. Add field items by clicking on the '+' symbol:



3. Each item gives you a dropdown, which will allow you to select from any and all available Custom Fields you may have created in the previous section. The order you list these in will be the order they will appear to anyone creating a new Content Page or Custom Content Widget.
4. When you are finished adding all necessary fields, click on the blue 'Save' button at top right, then select 'Publish' or 'RePublish' from the 'Workflow' dropdown.

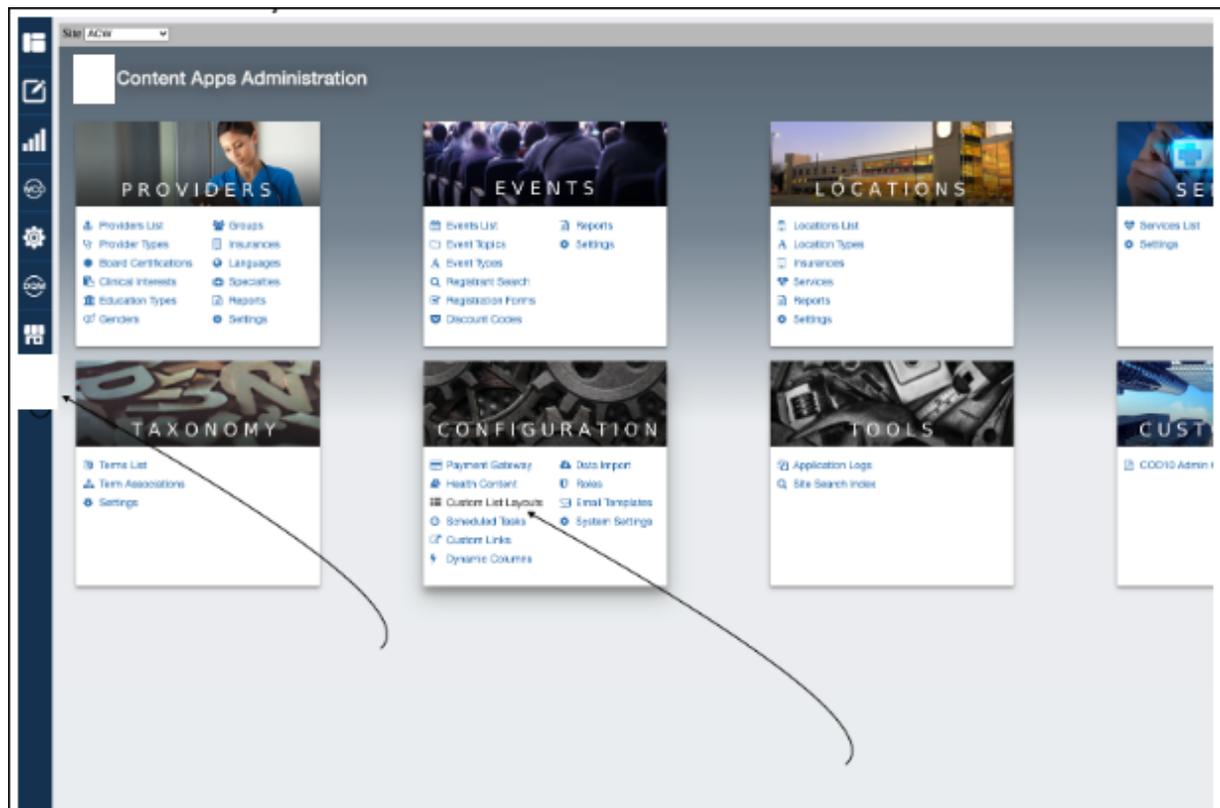
### Create Layouts for Content Pages and/or Custom Content Widgets

1. Navigate to the Content Type's 'Layouts' folder: **Site Root/\_ Configuration/\_ Custom Content/Content Types/Your New Content Type Folder/Layouts**
2. You may create as many layouts as you like. To create new ones, click on File > New > Custom Layout. Name your layout and click 'Create'. There is already a Default Layout for you to configure, if you only plan on having one layout.
3. Open up the layout file, and you will be faced with a large white editing space labeled 'Markup'. There is already a default template available, but you will probably want to erase this and start from scratch. This space is where you will build your HTML structure. Again, this will be the HTML for either a:
  - a. **Content Page**, in which case, you will be building a layout for a whole page. Example would be a Blog or News page.
  - b. **Custom Content Widget**, in which case, you will be building a small HTML structure. Example would be a bootstrap card, or something similar.
4. Click the **Available Tokens** dropdown to the right. You will see a list of Tokens that represent the Custom Fields you had assigned to this particular Content Type in the previous section (There are also a few out of the box tokens that come with every Content Type, ie. {AssetId}, {Page Title}, etc. These are at the very bottom of the list). As you build out your HTML, you will copy and paste these tokens into places where you want the field to output. For example, say you are building a Blog page layout, and you want the 'Blog Heading' field to output as an h1 at the top of every Blog Content Page you create. Your HTML would look something like this: `<h1 class="blog-heading">{BlogHeading}</h1>`
5. Once you are finished building your layout, click on the blue 'Save' button, then 'Publish' or 'RePublish' from the 'Workflow' drop down.

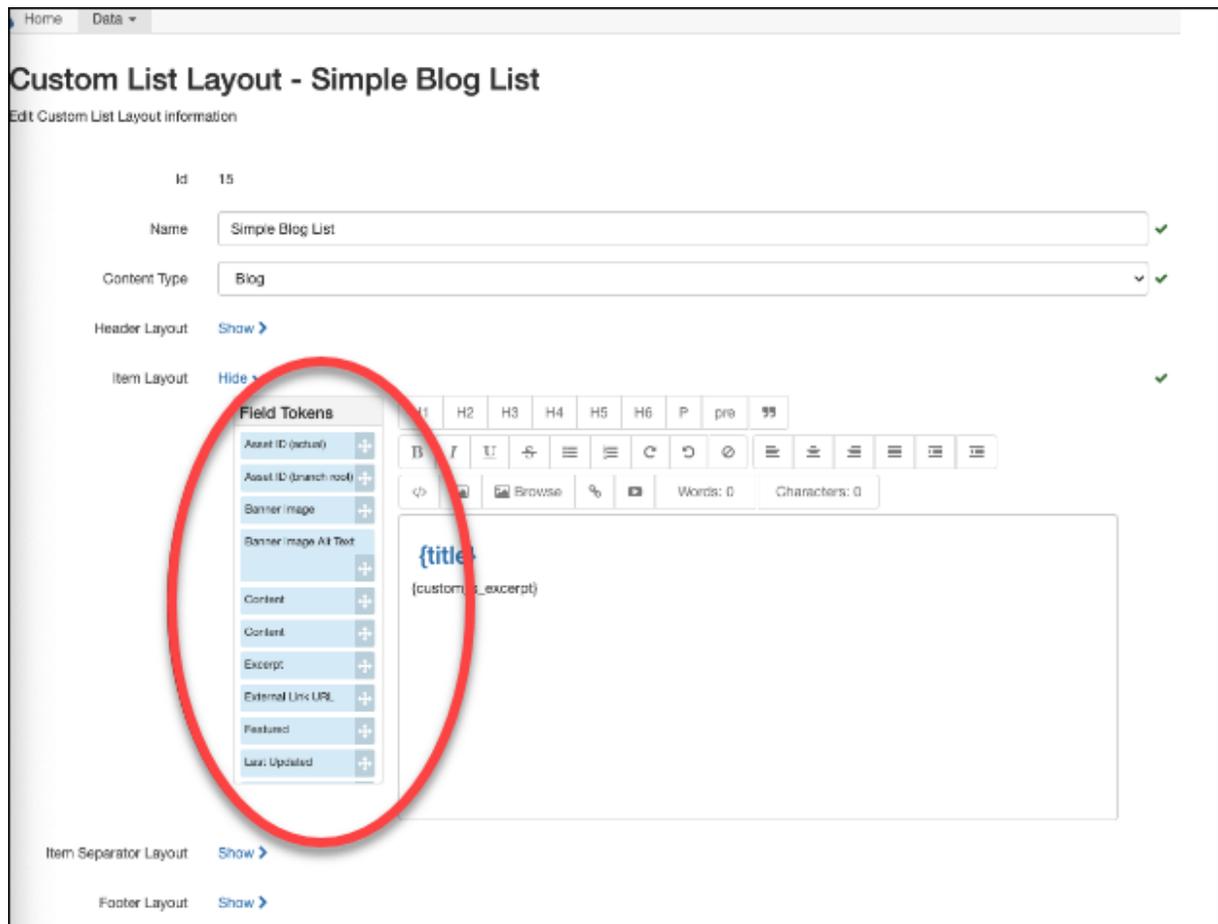
### Create Custom List Layouts for Custom List Widgets

As mentioned above, there is another type of Layout called 'Custom List Layout'. These are created and output on a Custom List Widget.

1. Navigate to **Custom List Layouts** in Content Apps: **Content App Tab > Configuration box > Custom List Layouts**



2. Click on 'Create New' at the bottom right of the screen.
3. 'Name' your layout.
4. Select the 'Content Type' that this layout will be used on. As soon as you select one, you will see a list of tokens populate in the 'Field Tokens' area of the 'Item Layout' section:



5. Just like with regular Layouts, you will build your HTML structure here, and use the tokens to the left. However, in this case you need to, first, click on the source code icon ('</>'), which allows you to build using HTML, and, instead of copy and pasting fields, you will drag and drop them in the spots you want them to output. The naming convention is different from the naming convention for the Layouts above. Example {BlogHeading} in Layouts, might be {custom\_ss\_blog\_heading\_235476} in Custom List Layouts.
6. The HTML structure you build in the Item Layout section outputs per item found in a Custom List Widget. Example, say you build a simple bootstrap card layout here, and put in some Blog tokens. When you build your Custom List Widget, tell it to look for Blog Content Pages, and output them using this Custom List Layout (more on Custom List Widget creation and configuration below), it will find all instances of Blog Content Pages (unless filter is set on the widget), and output each instance as a bootstrap card, with field tokens outputting uniquely per page instance found.
7. There are also 'Header Layout', 'Item Separator Layout', and 'Footer Layout' sections. These are rarely used, but basically only output once per widget, or after each item, in the case of the 'Item Separator Layout'.

## Creating Content Pages, Custom Content Widgets, and Custom List Widgets

Now that we've completely created and configured our Content Type(s), it's time to start utilizing those efforts by creating actual content! This means creating Content Pages to be viewed on the front end

and/or used in Custom List Widgets. Or it means creating Custom Content Widgets or Custom List Widgets and placing them on Static Pages.

### Create Content Pages

1. Navigate to the \_Pages section of your site: Site Root/\_Pages
2. You will most likely want to create a Folder named after your Content Type. Some Content Pages will be used as actual, visitable front end pages and/or as data holders to be outputted in a Custom List Widget. In this case, just a named Folder is fine, ie. 'Blogs'. Other Content Pages will be used only as data holders to be outputted in a Custom List Widget. In this case, you will want to add an underscore to the name, just to designate it as more of a data folder vs. a directory that can be visited on the front end. Examples would be '\_Site Alerts' or '\_CTA Boxes'.
3. Once you've created a Folder, create a new Content Page within that folder by clicking File > New > Content Page

## Assets

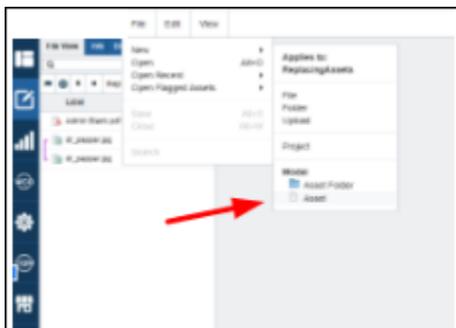
### General notes about Assets

- Assets have version control
- Most common types of Assets
  - Images
  - Documents (PDFs)

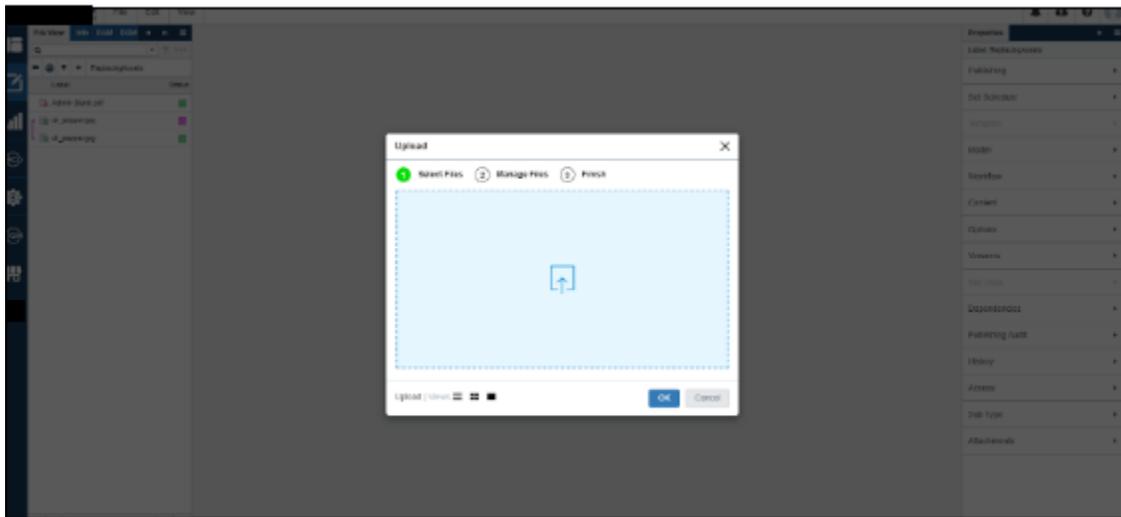
### Uploading & replacing images

#### To upload an image

1. Navigate to the desired Image folder (or create a new Asset folder)
2. Select File > New > (Model) Asset



3. Drag and drop the image into the Upload box. Then click OK

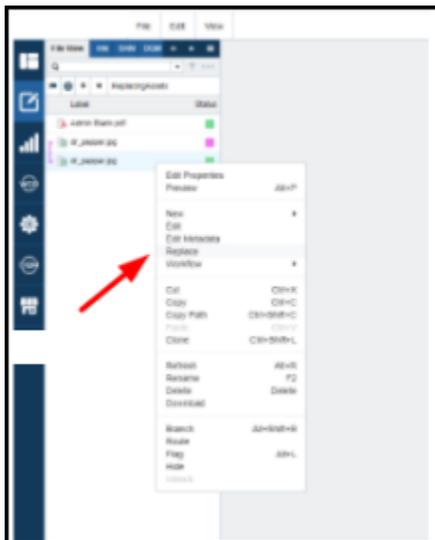


## Replacing Images

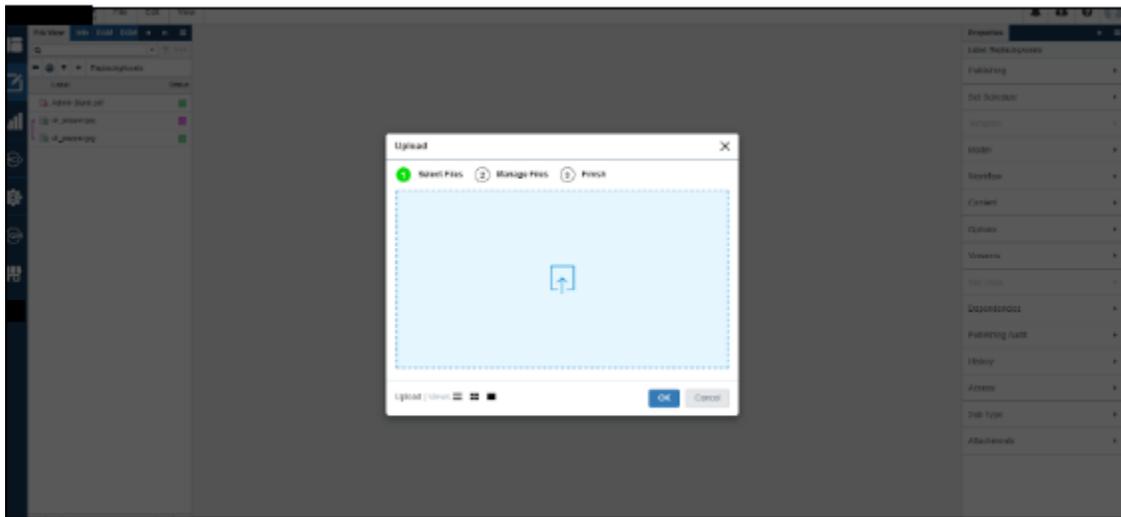
You can replace an image which changes the image to the replaced image but keeps the original asset ID.

To replace an image:

1. Select the image to be replaced and right click.
2. Select **Replace**.



3. Drag and drop the image into the Upload box. Then click OK.

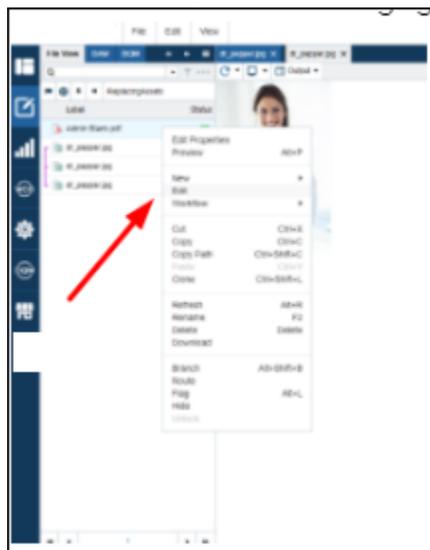


4. Republish to Stage/Live, as desired.

**Note:** It is also fine to branch the asset prior to replacing.

### Uploading & replacing documents

Use the same instructions above for uploading and replacing images, except instead of using 'Replace' (images only), use 'Edit' as shown below for changing documents.



Documents are handled similarly to images, but there are important differences.

- Images use 'replace', Documents use 'edit'.
- Replacing a document (or image) will not change its file name or URL. This has caused confusion for some because they think by replacing the document, it will update the URL and file name with the name of the new document. It does not.

For example, a client might want to have a monthly newsletter listed in several places and named [month] Newsletter. Imagine they upload the one for January first and the url is established as hospital.com/january-newsletter. Then imagine they add links to that document throughout the website.

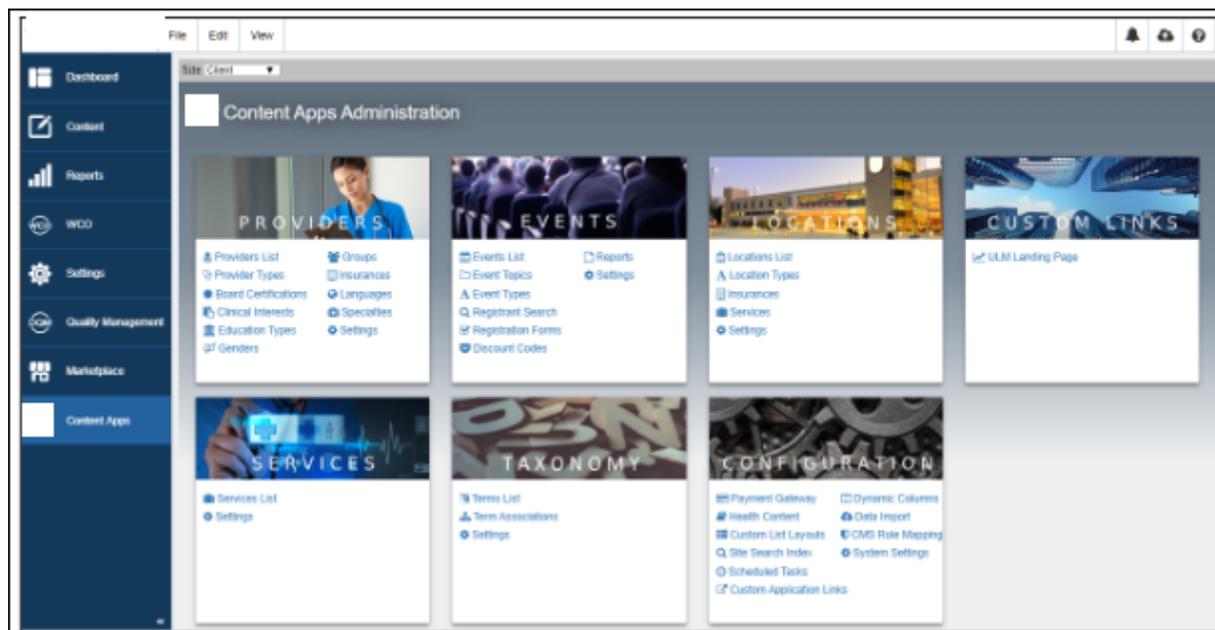
Then imagine they use the 'edit' feature to replace the file contents with february-newsletter. It will not change the filename in all those places to hospital.com/february-newsletter. The contents of the file will have the new February content, but the filename will still be hospital.com/january-newsletter. So in this case it would be best to use a generic name like current-newsletter if you plan on replacing the content and don't want to relink the document throughout the website.

## Content Apps

From the Content Apps console, you can manage Providers, Events, Locations, Custom Links, Services, Taxonomy and Configuration. Each content app has its own menu of management items.

*Disabled rows, or records in all Content Apps list views are dimmed for easy identification.*

Enabled



## Content Apps Administration

### Providers

The first step is to create a basic provider record. From there you can Add additional information that you want to show in the Provider Details section. You can also Edit or Delete the record as desired.

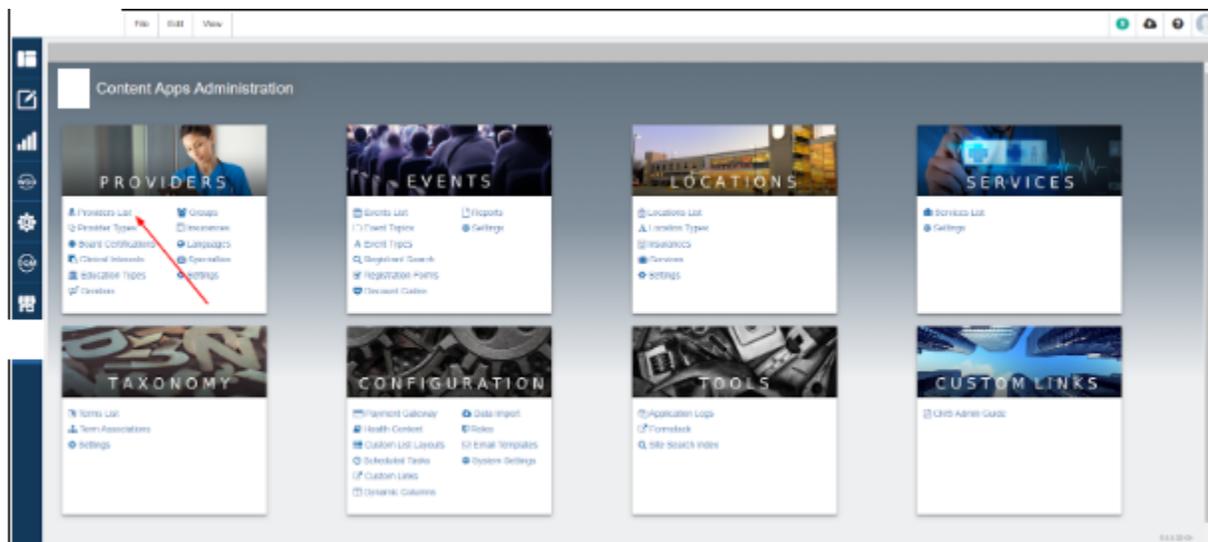
#### Add, edit, delete Providers

##### To add a Provider

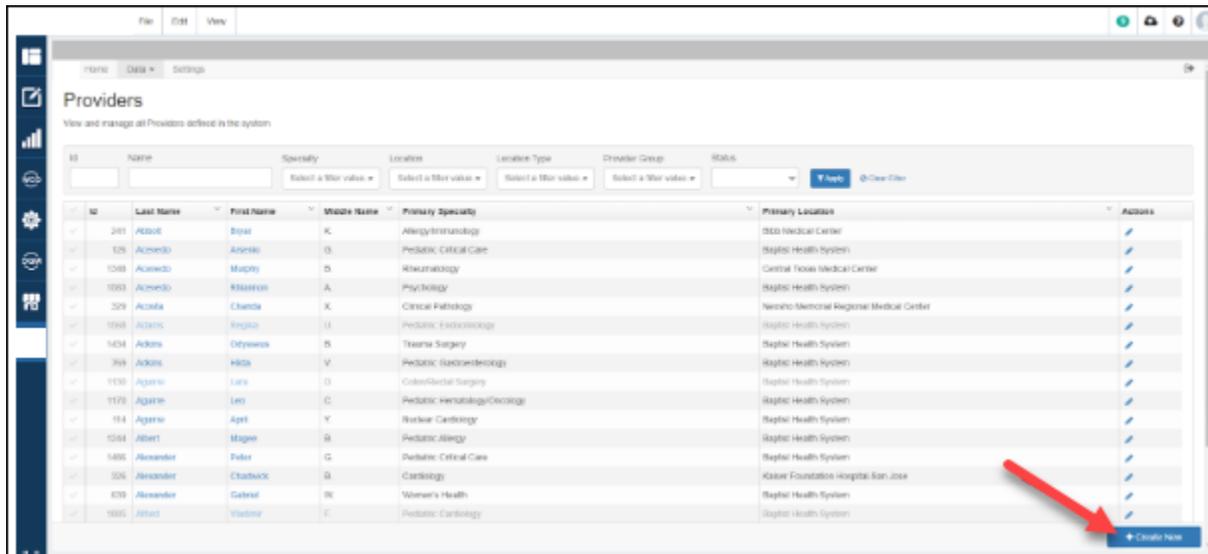
1. Navigate to **Content Apps**.



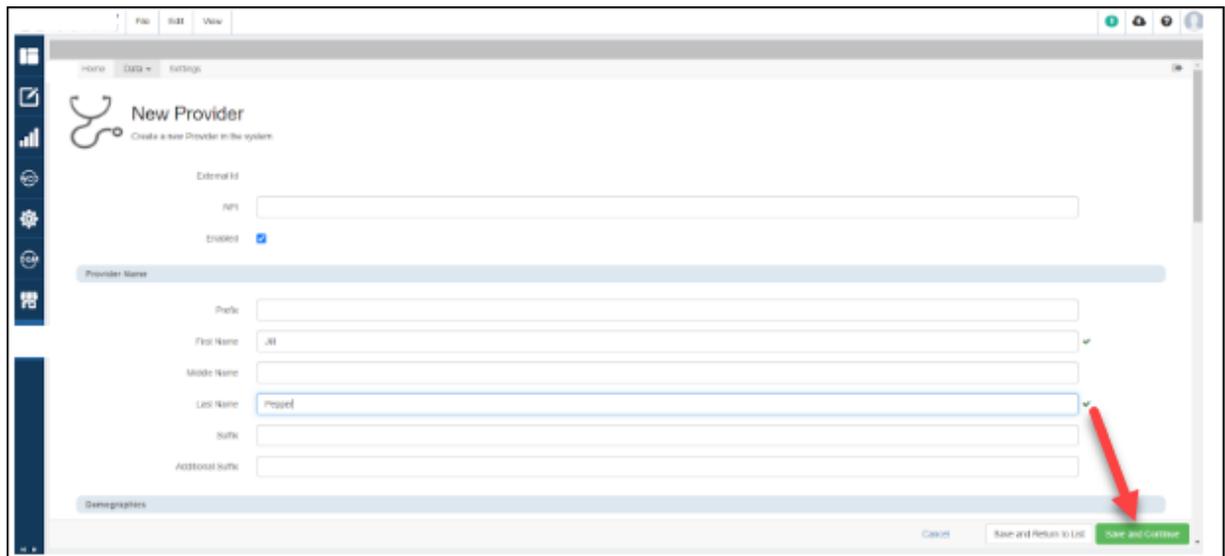
2. Select **Providers List** from the Providers card.



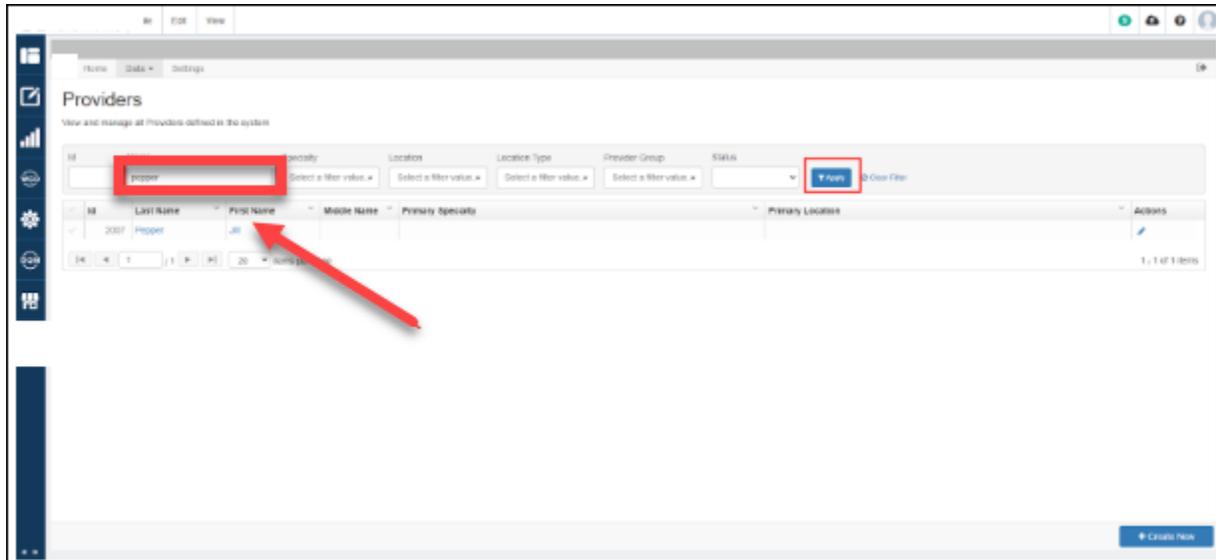
3. Click the + **Create New** button to create the provider record.



4. First name and last name are the only required fields. The rest is optional.
5. Click the **Save and Continue** button.



6. Once the provider record is created, you can click on that provider and enter any additional data desired.



### Edit Provider

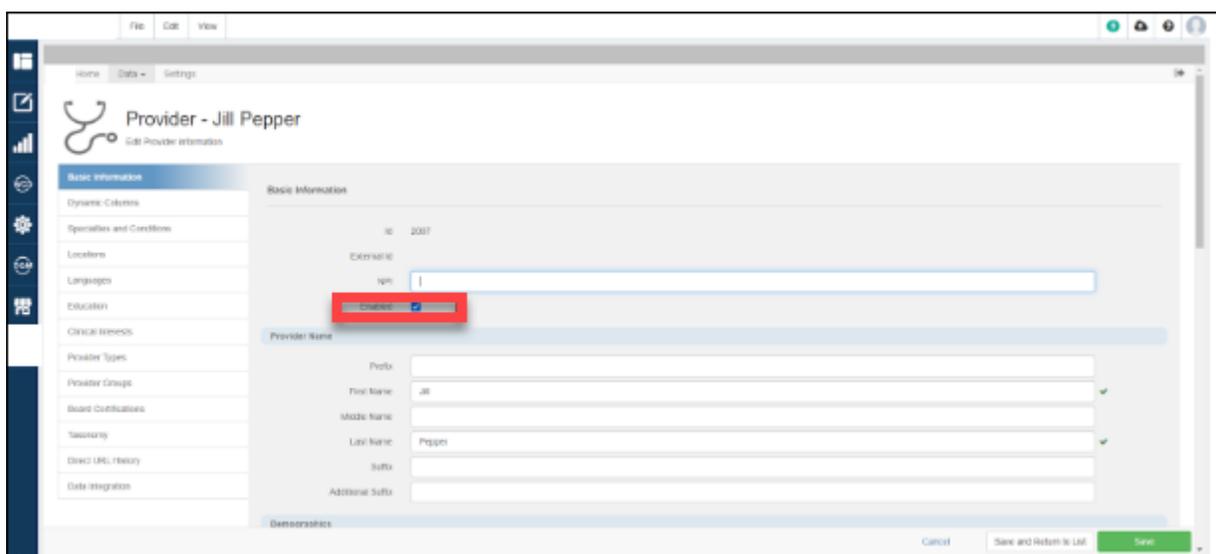
1. Search for a desired provider.
2. Click the name link to open.
3. Edit and fields.
4. Click the **Save** button.

### Delete Provider

Disable keeps the record, but it won't show up on the site. Deleting the record will remove them from the database.

To disable a provider:

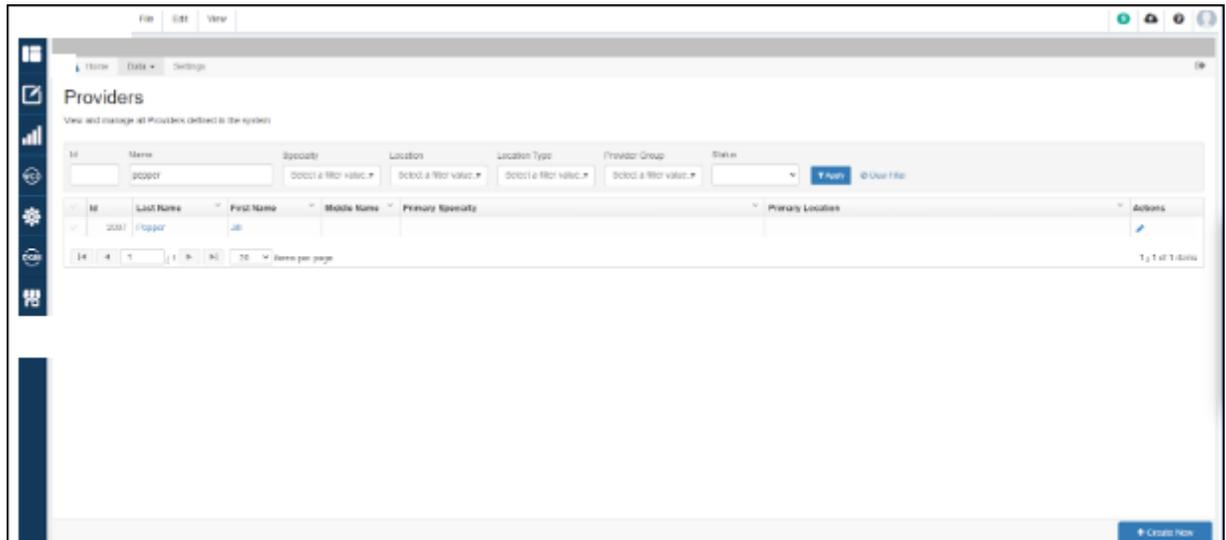
1. Open provider record.
2. Uncheck **Enabled**.



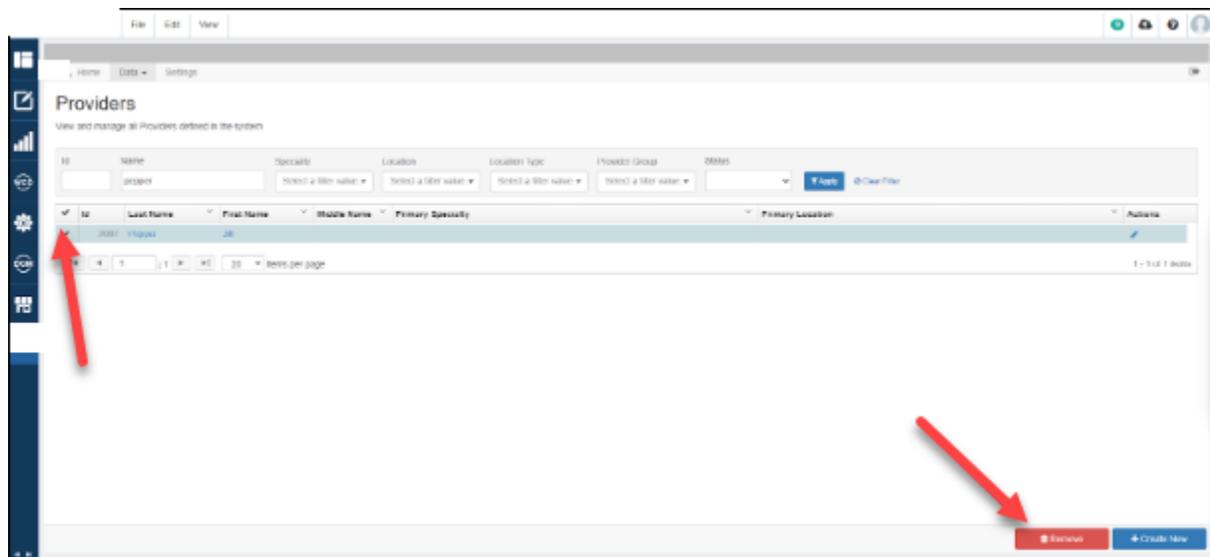
3. Click the **Save** button.

To delete a provider:

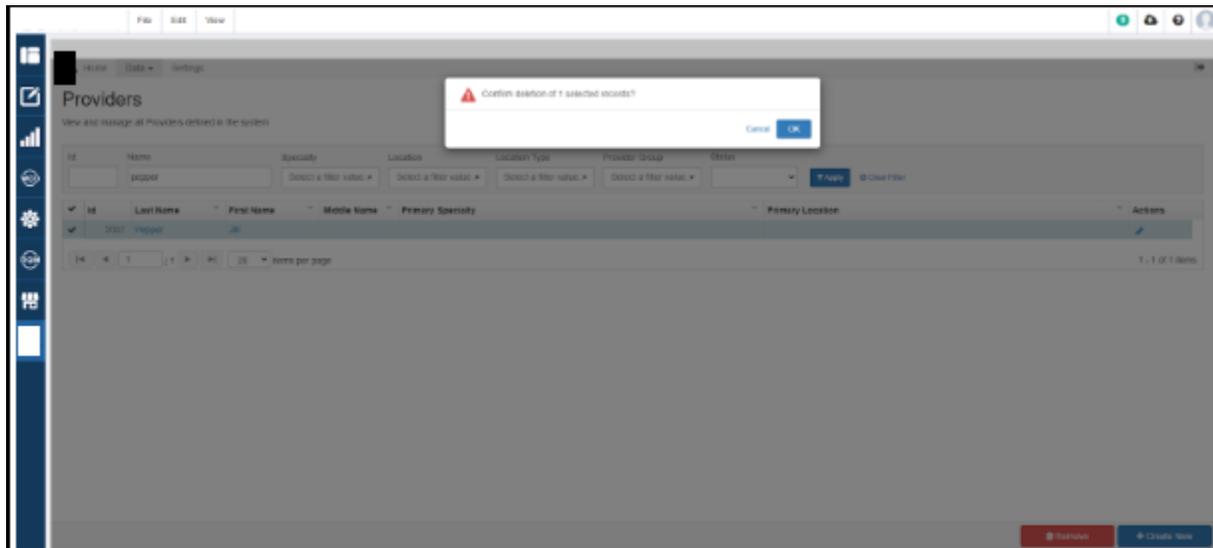
1. From the provider list, search for the desired provider.



2. Click the check mark to the left of the provider's name which will present the **Remove** button.



3. Click the **Remove** button.
4. Confirm deletion of record.

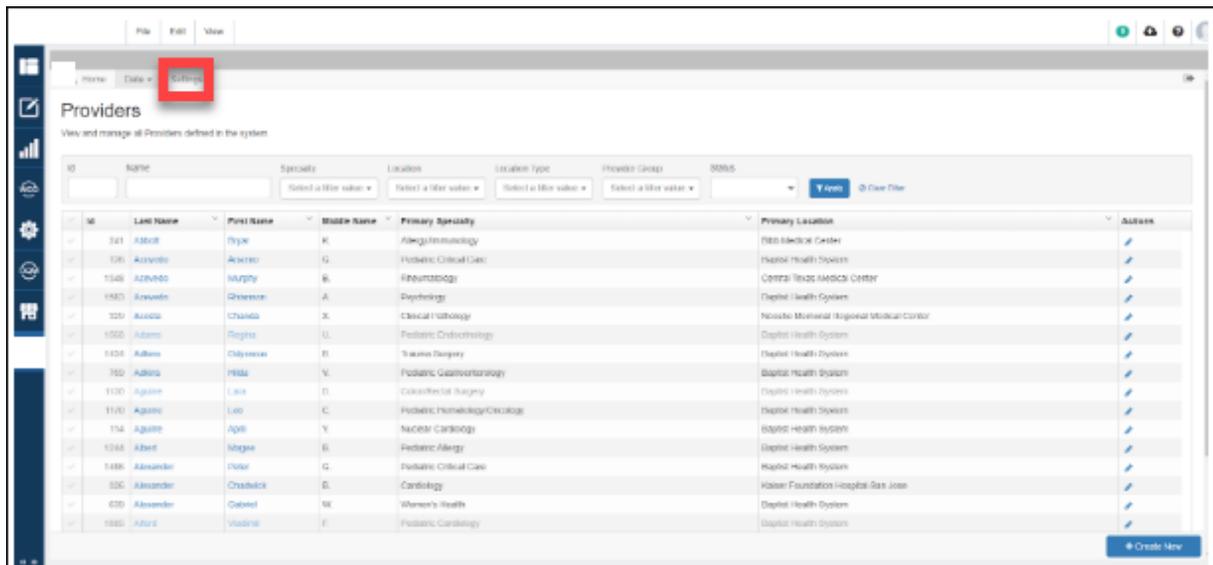


## Manage Provider App settings

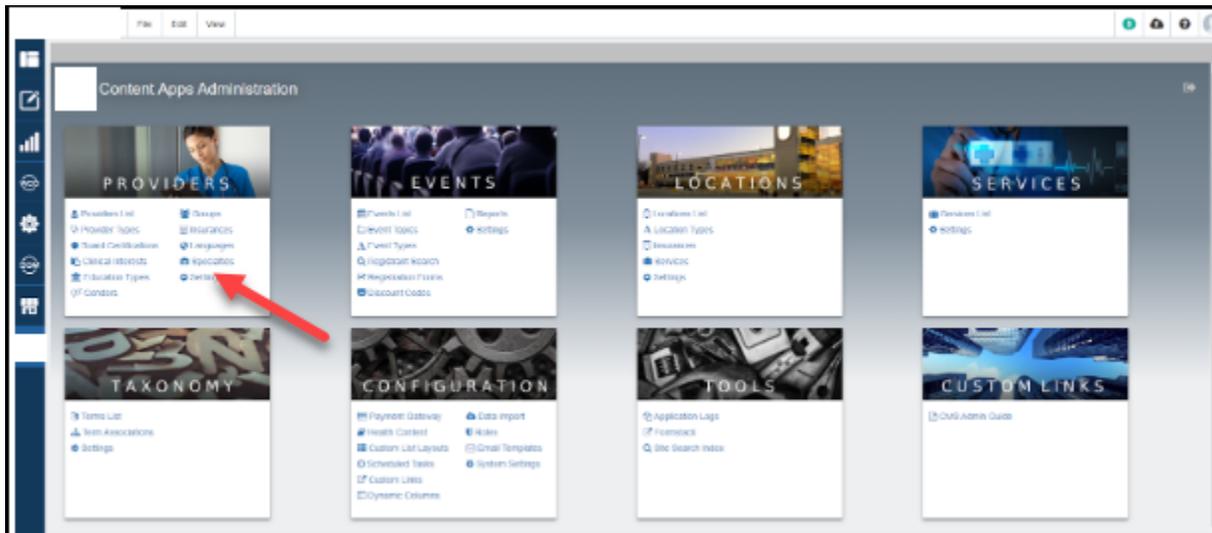
These settings are set up as part of an implementation. The client will not have to set them up manually the first time. However, a client may wish to change these settings.

To access these settings:

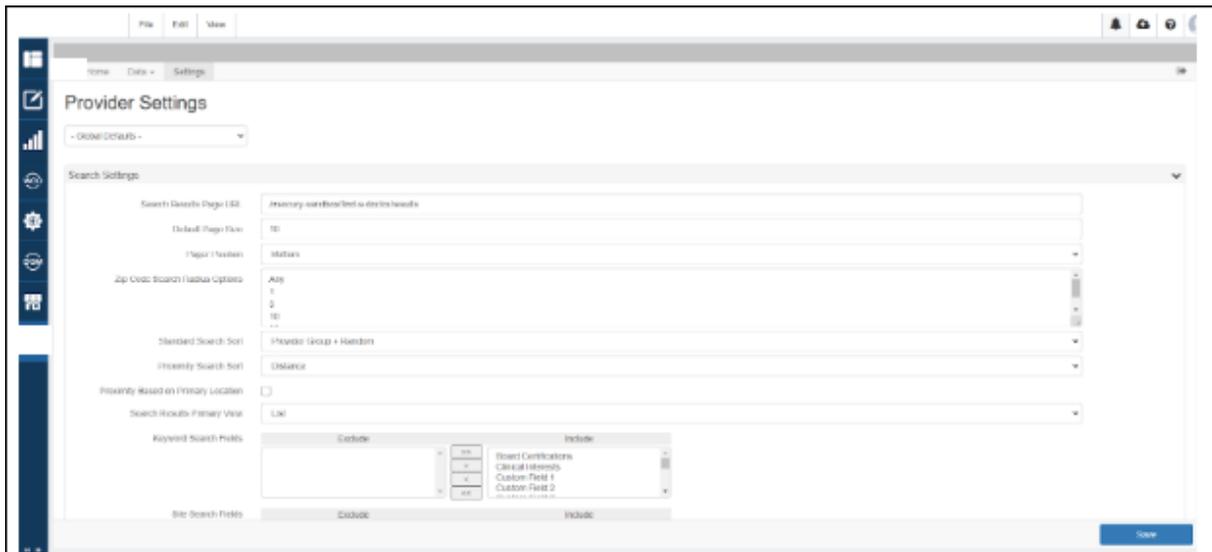
- From the Provider list, click **Settings**.



- Alternatively you can get to Provider settings from the Provider Card in Content Apps, Click Settings as shown below.



## Common Provider settings



**Search Results Page URL** - this is the URL where 'Find A Doc' search results will display

**Default Page Size** - the number of results returned per page; up to 25 results can be shown per page; pagination appears if more than 1 page of results are displayed

**Pager Position** - this is where the pagination is displayed around the results

**Zip Code Search Radius Options** - this allows for a search radius to be applied to the search as shown below. The values defined here will be used to populate the drop down list box.

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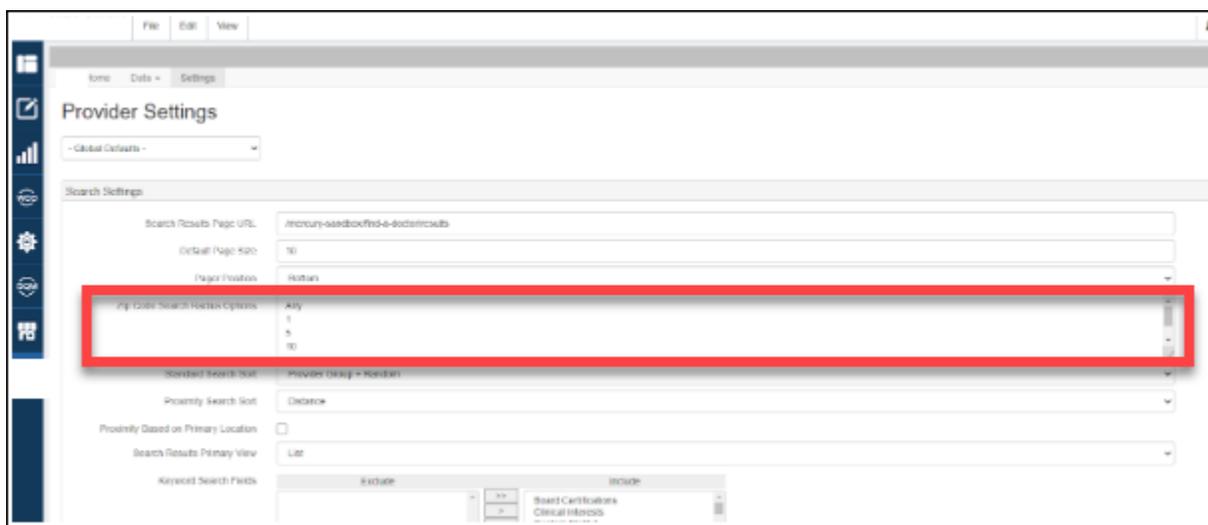
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### Things to remember about Zip Code Search Radius Options:

- The values should be listed as one to a row.
- The top value will be the default value.
- If using 'Any' list it first, as shown below



Common use case for this:

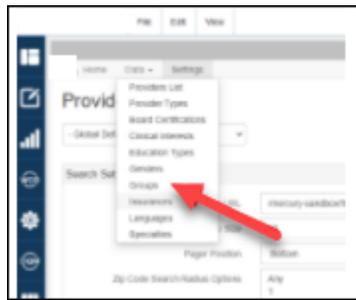
Client wants the default value to be 10 miles. But allow users the ability to change that to 1, 3 or 5 miles. Prior to this new feature, clients were limited to 5, 10, 100 and 200 miles.

**Standard Search Sort** - These settings apply to a result set from a regular (plain) search. It does not apply to proximity searches. So, for example, if you did a search where the radius was restricted to a certain number of miles, this setting would not apply to that result set. See Proximity Search Sort for controlling these searches.

- Alphabetical - returns results in alphabetical order
- Random - returns results in random order
- Provider Group\* - returns results in order by Provider Group, then by alphabetical order
- Provider Group\* + Random - returns results in order by Provider Group and randomized within each provider group

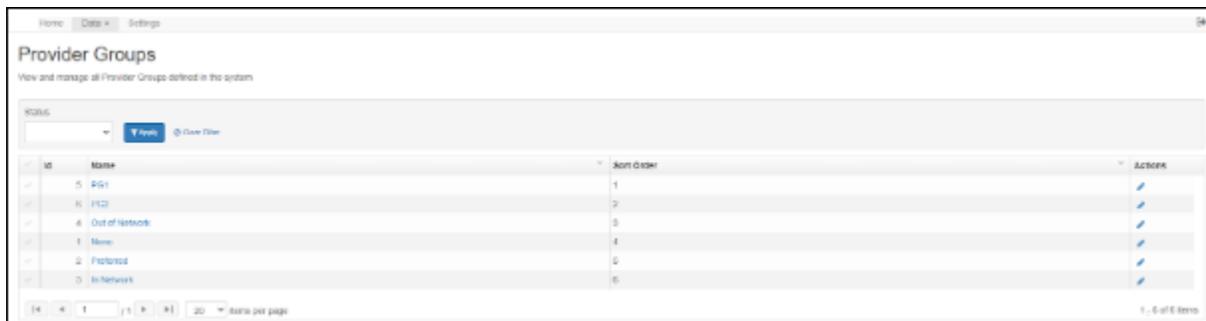
\* Provider Group sort order is determined by the Provider Group Sort Order as shown below. To see this click Data > Groups, as shown

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Below you can see the order in which providers will be returned.

So, for example, if Provider Group + Random was selected as the Standard Search Sort, the result set would display as follows...all providers belonging to PG1 would be randomized and displayed first. Then providers belonging to PG2 would be randomized and shown second, and so on.



ID	Name	Sort Order	Action
5	PG1	1	<a href="#">Edit</a>
6	PG2	2	<a href="#">Edit</a>
4	Out of Network	3	<a href="#">Edit</a>
1	None	4	<a href="#">Edit</a>
2	InNetwork	5	<a href="#">Edit</a>
3	InNetwork	6	<a href="#">Edit</a>

**Proximity Search Sort** - this setting controls how results are displayed when searching by Proximity

- Distance - returns results based only by distance
- Provider Group + Distance - returns results in order by Provider Group sort order configuration and randomized within each provider group

**Proximity Based on Primary Location** (checkbox)

- If enabled, if the provider practices at multiple locations, proximity is calculated exclusively by the primary location.
- If not enabled, each affiliated location is evaluated independently in search calculation.

**Search Results Primary View** - options are List or Map

- This setting is usually configured at the widget level

**Keyword Search Fields** - use this to include/exclude data that is queried

- When a keyword search is run, the fields in the 'Include' section will be searched
- For example, if someone enters University of Alabama and a doctor was educated there and education was an Included field, they would show in the search results.
- Use the arrows to move data between Include and Exclude.
- The term 'keyword' can also be used here. This can refer to the taxonomy used by the site as well as the custom keywords that can be associated with a provider



**Site Search Fields** - this functions the same as Keyword Search field, but relates to site search (as opposed to Find a Doc search).

**Detail Settings** - these are all setup as part of the client's new site configuration. It is strongly recommended to NOT change any of these settings.

**Detail Page URL** - this is where provider details page will be outputted

**Direct URL Path** - this is the root path for the doctor URL; it is created based on the tokens selected

**Direct URL Formula** - this determines how the URL is dynamically created for each doctor

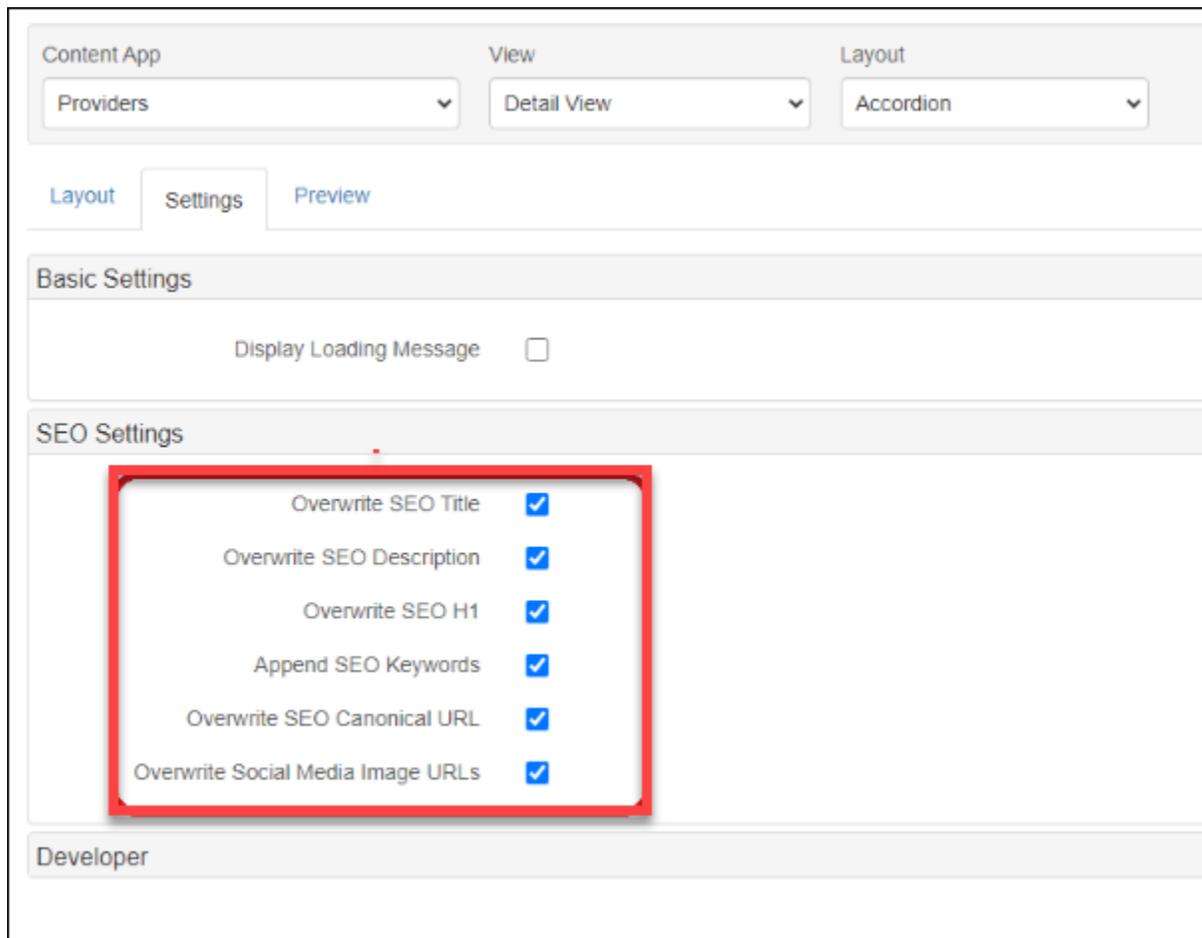
**Default Provider Image URL** - this is used to override the default image settings

### Manage Provider SEO settings

These settings are also set up initially for the client during implementation and should NOT be changed without first consulting with a WebMD Ignite support engineer.

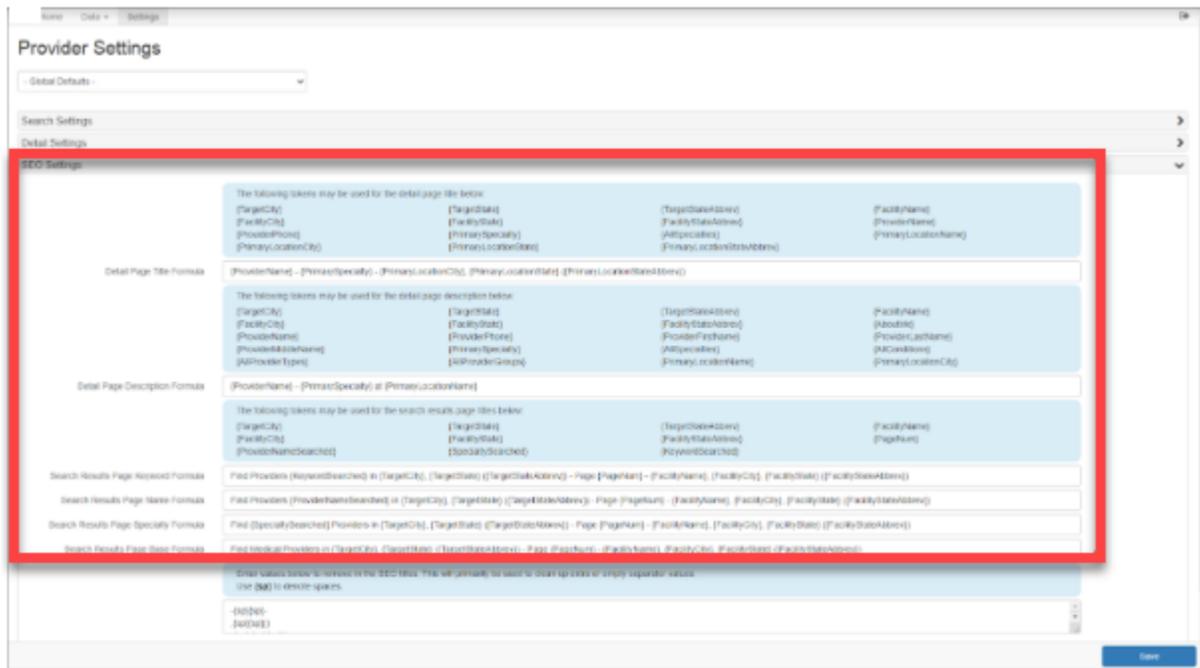
These SEO settings are token based and for content apps will override the system settings.

When configuring a content app widget that has a **List View** and **Detail View** you often get settings like:



It varies from widget to widget, and view to view, but this is the idea.

**These take precedence over what's defined at the page level.** The values for these can also be set specifically on a provider/event/location record, or in the absence of a specific value it falls back on a formula for providers, the default formulas are defined in the Provider Settings area of the content apps admin:



**Detail Page Title Formula** - this is completely configurable using tokens and text to create a SEO setting for doctor detail pages.

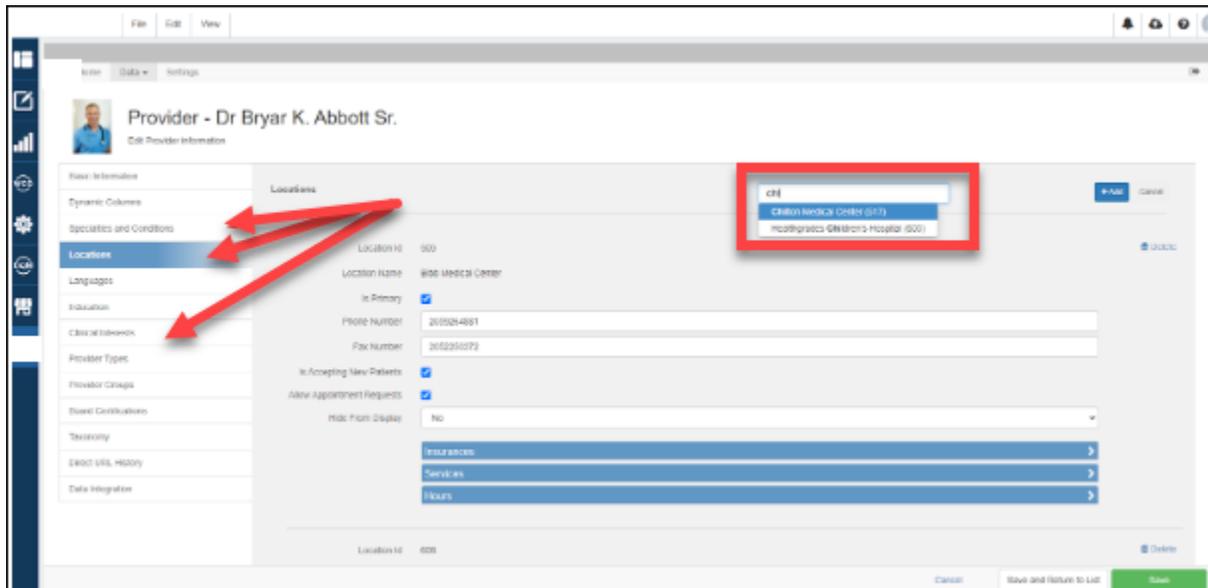
**Detail Page Description Formula** - if an 'About me' section exists we will use this for the meta description. Otherwise, we pull in first 160 characters

Other options where SEO can be specifically configured for Content Apps includes:

- Search Results Page Keyword Formula
- Search Results Page Name Formula
- Search Results Page Specialty Formula
- Search Results Page Base Formula

**Provider Name Settings** - this is used to configure the 'provider name' token that is used on the Details widget; when you drag over the token for provider name this is where that token got configured/constructed from those fields in the provider record.

**Admin Settings / Use Autocomplete for Dropdowns (checkbox)** - Enables autocomplete for specialties and conditions, locations and clinical interests dropdowns in provider record, as shown here. If not checked, it uses a dropdown list instead.



Need to add information about reporting here.

## Locations

The Locations Content App allows consumers to search for locations that are associated with the healthcare organization. From the screens in this app, associated content, such as: Location Types, Insurance and Services can be customized, based on your preferences.

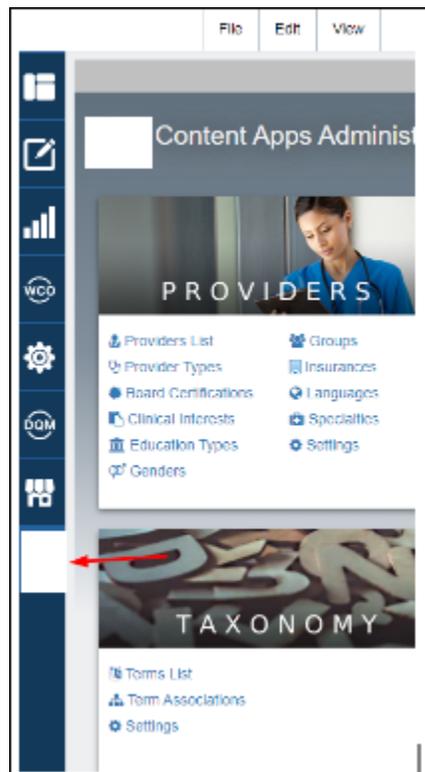
### How to access the Locations Content App

To access the Locations Content App from anywhere within CMS Admin, click the Content Apps (WebMD Ignite icon) option from the left navigation menu. Click on the Locations List option in the Locations square. All of the remaining links from this panel (Types, Insurances, Services and Settings) are accessible from within its pages.

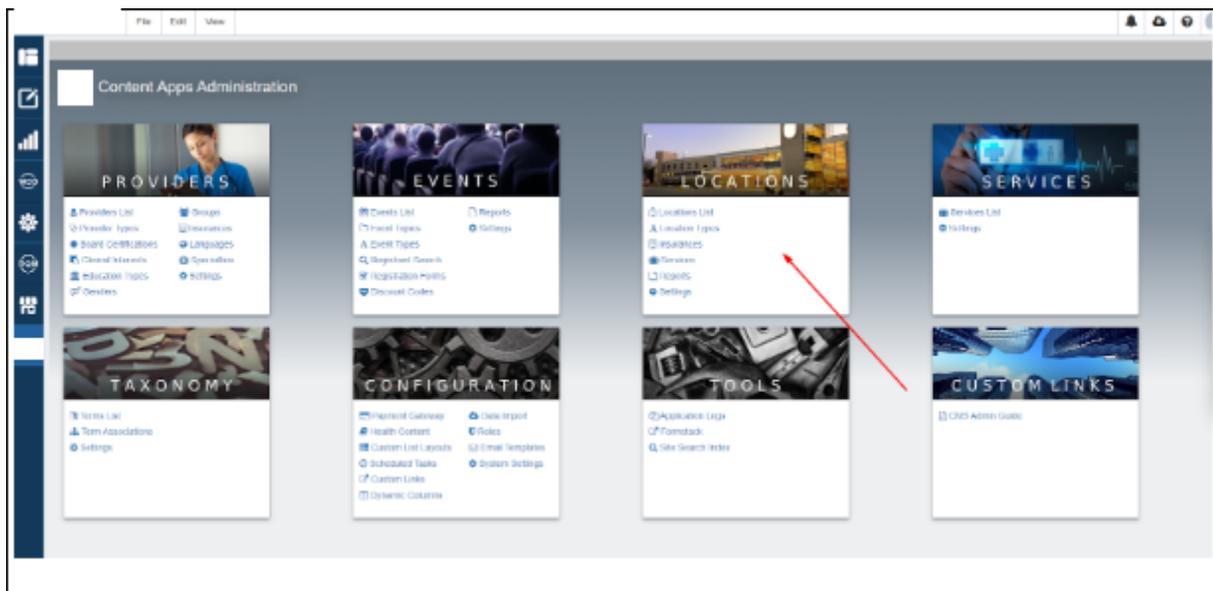
### Add, edit, delete Locations

To add a location:

1. Navigate to **Content Apps**.

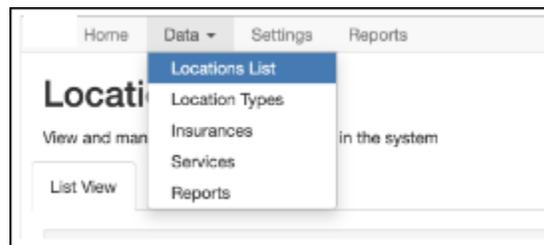


2. Select the **Locations** card.

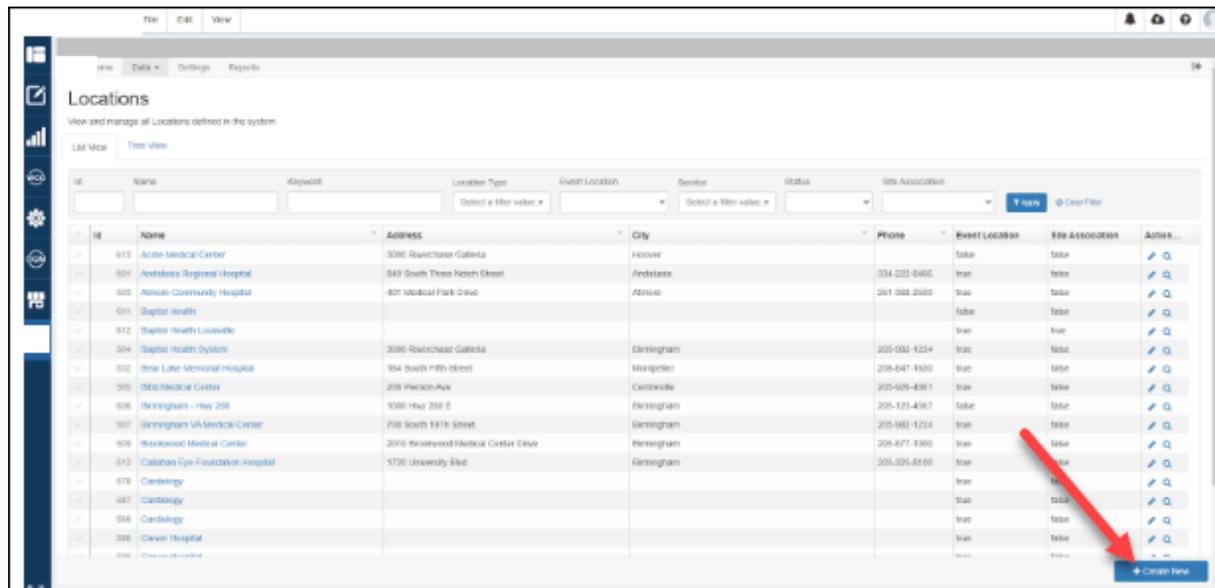


3. Click the **Locations list**.

**Note:** Accessing locations links other than Locations list is as simple as expanding the Data dropdown or clicking through to the Settings or Reports menu items once you've clicked through to Locations list:



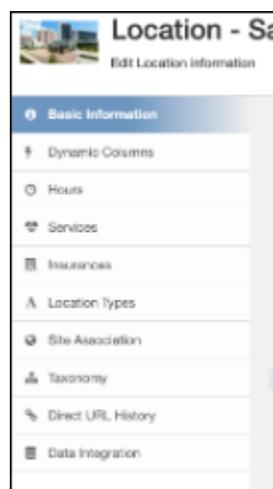
4. Click **Create New +**.



5. Enter the name and other pertinent information. Once you enter the name, that's really enough to save the location record, but it's best to be as thorough as possible.

6. Click the **Save and Continue** button.

7. You'll now see a left-hand navigation bar on your location instance. It should look something like this:



8. Complete all desired fields and click the **Save and Return to List** button when done.

Important notes about Locations details:

- **Address Section**  
The Address fields are used to run a geocode through Google Maps. If your Google Maps API

key is associated with your instance, the CMS will automatically calculate and apply the latitude and longitude based on the address given.

- **Custom Coordinates** - The Google Maps location marker can be overridden by using 'Custom Coordinates'. For example, if the parking lot was at a different location than the building address, you could use this to point users to the parking location.
- **Contact info** (Phone, Fax and Email)  
This will be inherited down to the providers associated with this location, however, that inheritance can be broken at the Provider level.
- **Events & Payments** - see notes  
Potential Event Location - Important to check if you are planning to create an event that should be tied to this location.
- **Payment Gateway** - this also should be selected if you plan on having paid events. This setting is used to tell the CMS which gateway to use to process payments for events.
- **Misc Setting** - see notes  
You can toggle on/off the following setting to control how the location can be found
  - Hide from Site Search
  - Hide from Location Search
  - Hide from Provider Display

For example, if you want to associate a provider to a location for site context but don't want that location to show in the physician's profile, you toggle off the 'Hide from Provider Display' setting.

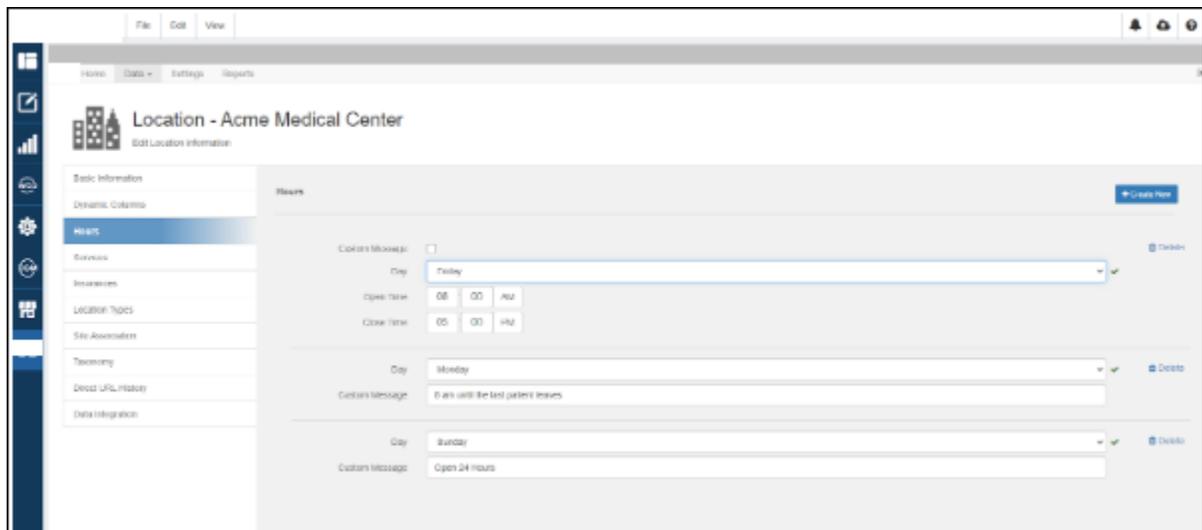
- **Service Line URL - Do not use - this functionality has been deprecated.**
- **SEO Settings** - see Manage SEO Settings
- **Custom Fields** - see notes  
Custom Fields are used to create custom data points. Use this section if no other fields fit your needs for displaying data on the front end or including it in search. Please note, this isn't used much anymore. Now dynamic columns have generally replaced the need to use these fields.

Upon saving a location's basic information record, you can add the following types of information if it exists for that location by clicking on the section header

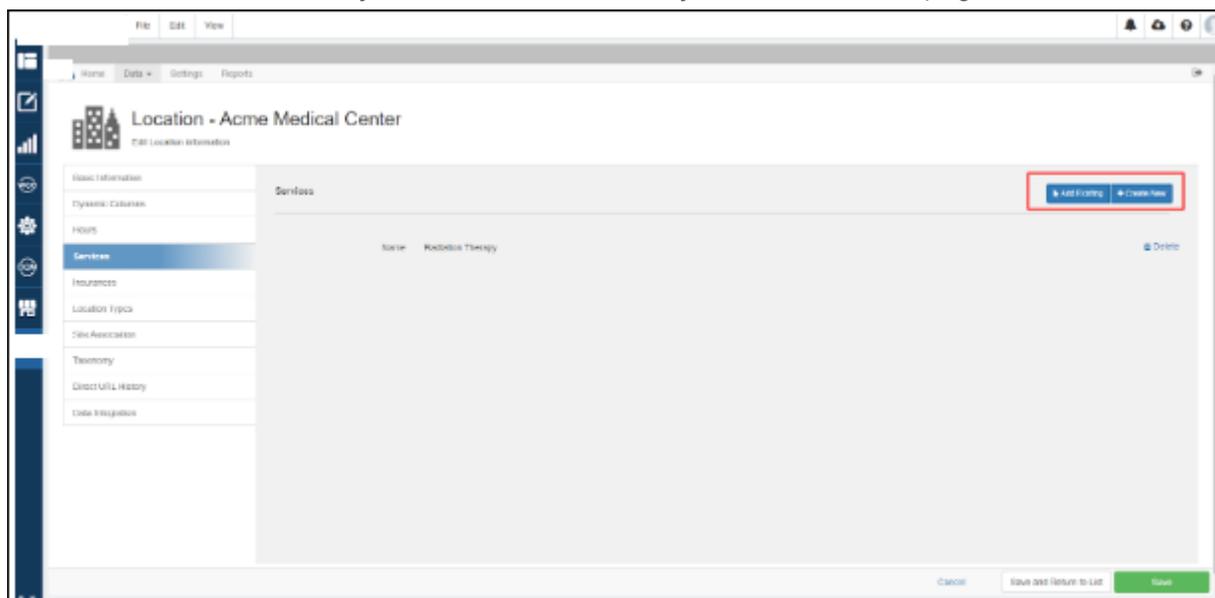
In the left-hand nav example, you'll see some of the following items: dynamic columns, hours, services, insurances, location types, site association, taxonomy, direct URL history, and data integration.

- **Dynamic Columns** are created specifically for you and your health system's needs. No two sites are alike.

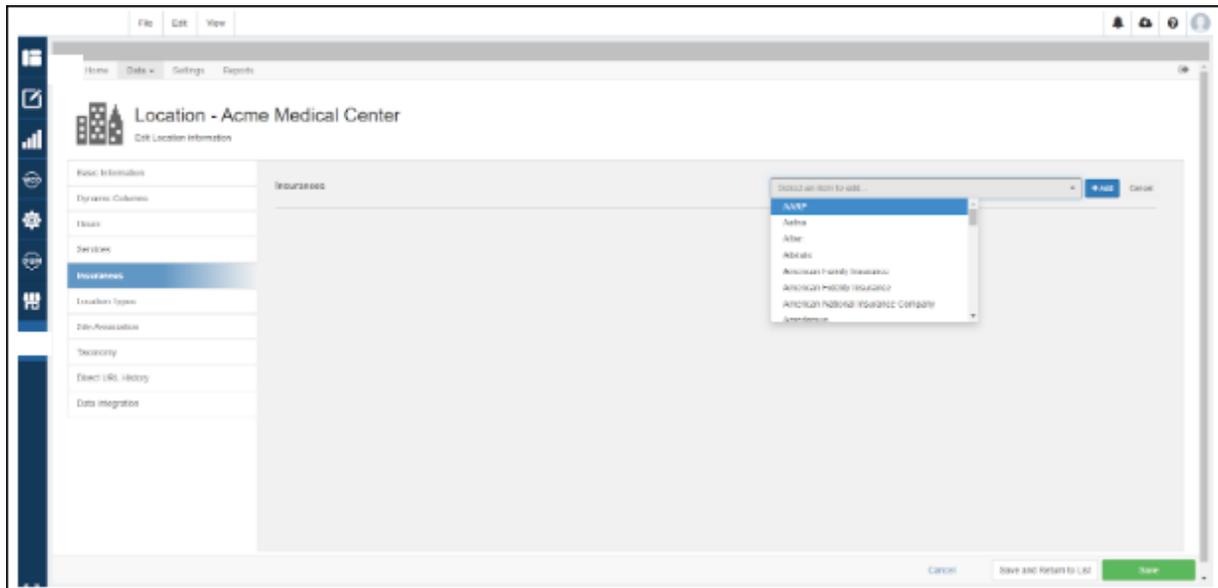
- **Hours** - Enter discrete fields or a custom message, per day.



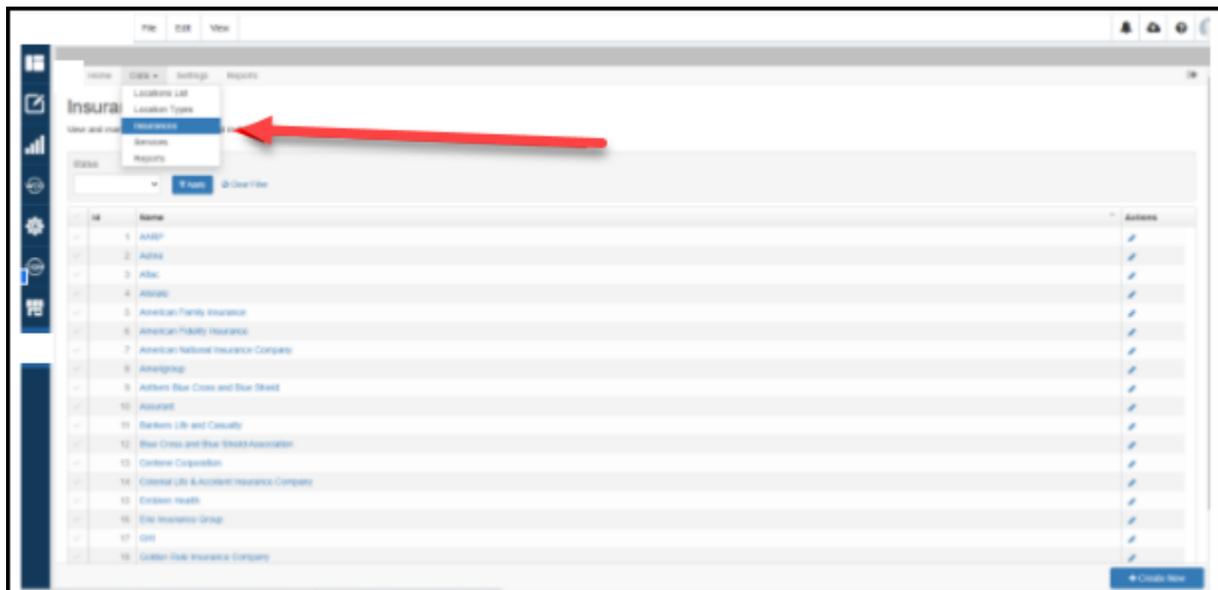
- **Services** - Choose existing services or create a new one
  - This is one way to add a list of services to your location details page



- **Insurances**
  - Like Services, this is also not really used much anymore. Since insurance is determined by both location and provider, most clients don't use this location based feature.
  - If you want to associate an insurance to a location, you would do it here by selecting an existing insurance or adding a new one.
  - To see a list of insurances click Data in top left of the screen, then select Insurances

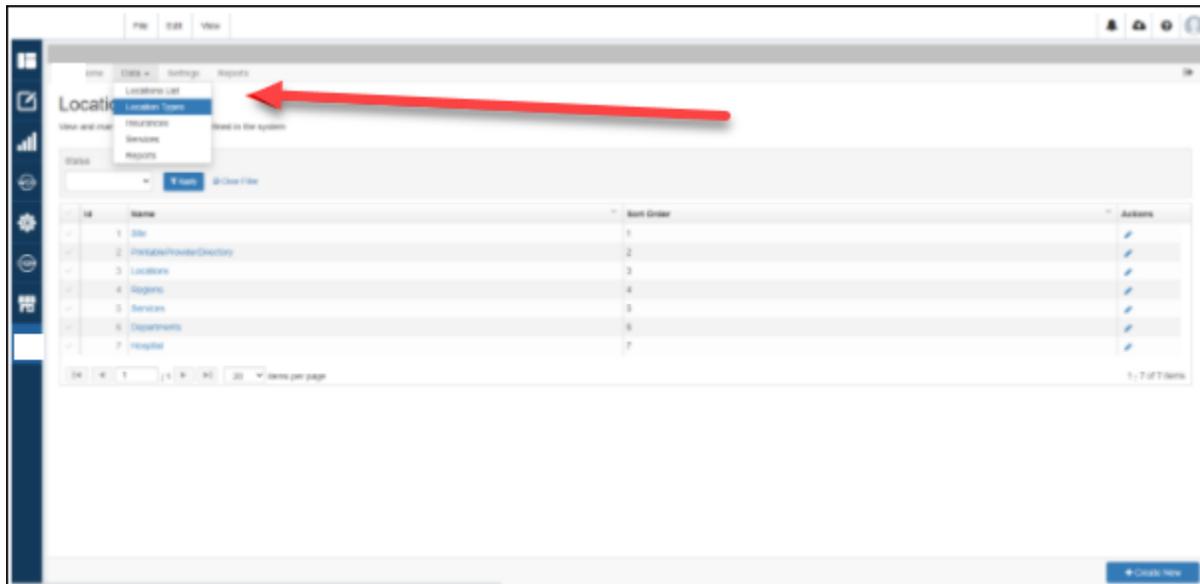


List of Insurances



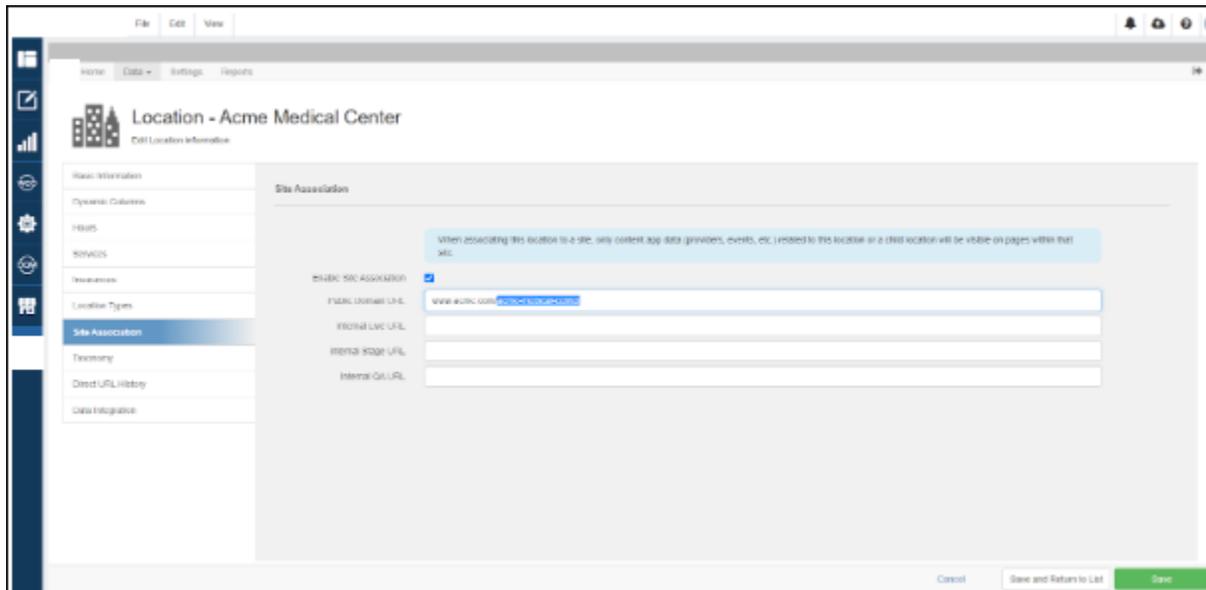
- **Location Types** – use this section to add location types such as hospital, emergency, urgent care etc  
To see a list of location types, click 'Data' in the top left. Then select 'Location types'.

Location types are helpful when powering searches and populating widgets throughout the site.



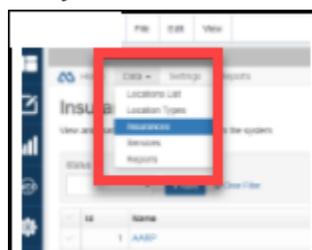
- **Site Association**

- **This is an advanced topic.** Please do not edit these settings without first touching base with your web engagement lead or reaching out to the WebMD Ignite support team.
- Site Association allows you to partition out the providers and events that will show up on a given site.
- This is used primarily with subsites, where the subsites have their own providers and events.
- This will establish a relationship with a URL and the providers and events that are associated with that URL.
- So in this example, Public Domain URL is [www.acme.com/acme-medical-center](http://www.acme.com/acme-medical-center). Assume acme-medical-center is a subsite. What this will do is limit search results (provider, location or event search) on this subsite to only doctors and events that are associated with this location or any children locations underneath this location.
- The remaining fields on this screen are used to provide corresponding urls so the site association context works on all the urls for both pre and post go-live.



- **Taxonomy** - this section allows you to assign taxonomy terms per location
  - **Custom Keywords** - this might be used when a location name has changed or been rebranded and the former name no longer exists in the content. You would enter the former name here so that location and site search searches will return this location when that former term is searched on.
- **Direct URL History**
  - For example, the direct URL for a site might be acme-medical-center but the customer wants to override this setting, they would do that by checking 'Custom Direct URL' and providing a new 'Direct URL' like acme-medical-center-and-health-facility
- **Data Integration**

The main purpose of the Locations List, Location Types, Insurances (and to a lesser extent, Services) as seen in the Data drop down menu, is so they can be searched on.



## Manage Location Content App settings

### Location Search Settings

You should never have to edit these settings. Search functionality of most sites is powered by widgets which offer much more advanced and robust search filtering and presenting capabilities. If you want to adjust how your results are presented, please reach out to your web engagement lead or the WebMD Ignite support team to be sure you're going to the right place.

**Note:** If you are not seeing a location or changes present in results, click the Refresh Site Search Index button in the screenshot above.

### Location Details settings

Editing anything in this section is not recommended without the guidance from your web engagement lead or the WebMD Ignite Support Team.

### Location SEO settings

As with providers, the SEO settings are configured by WebMD Ignite as part of the implementation. However, a user can use these settings to override the system default settings.

Click **Settings** and toggle open the SEO settings accordion:

The other SEO settings that can be configured per location are

- SEO Page Title
- SEO Page Description
- SEO H1
- SEO Primary Keyword
- SEO Secondary Keyword
- SEO Canonical URL

You will see all of the standard options to pull into your meta information, however, you can also free-hand text into these fields. Please be mindful that anything free-typed will be shared across all locations on your website and you'll want to be mindful of character limit best practices.

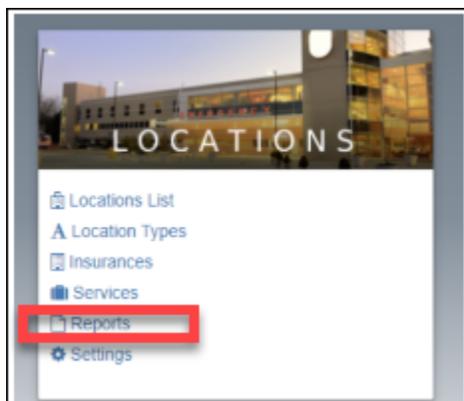
### Location Inheritance Settings

#### Location Lead Management Settings

In the Location Settings you'll see these two options as well. Please do not edit them without guidance from WebMD Ignite .

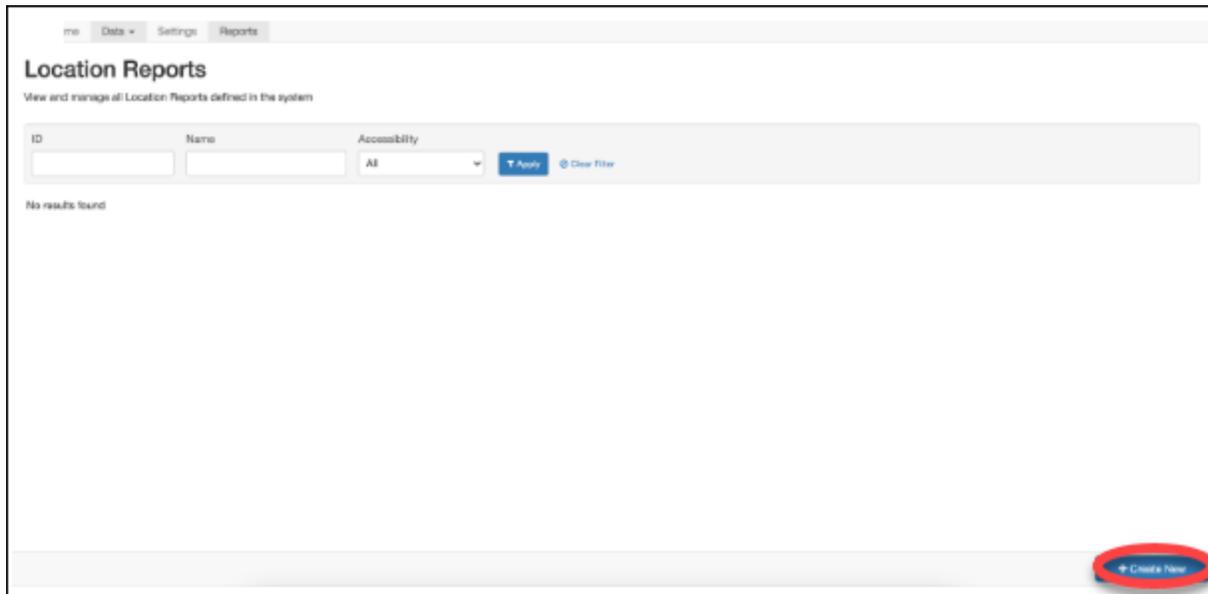
### Locations Reporting

Locations reports allow for the ability to define, run, and export Locations reports. This link exists with the Locations tile on the Content Apps admin landing page.



Here, over 30 location fields can be referenced by report criteria and displayed by the resulting report. All dynamic columns are also able to be queried here.

If you haven't already created reports, click on New Report to create your first:

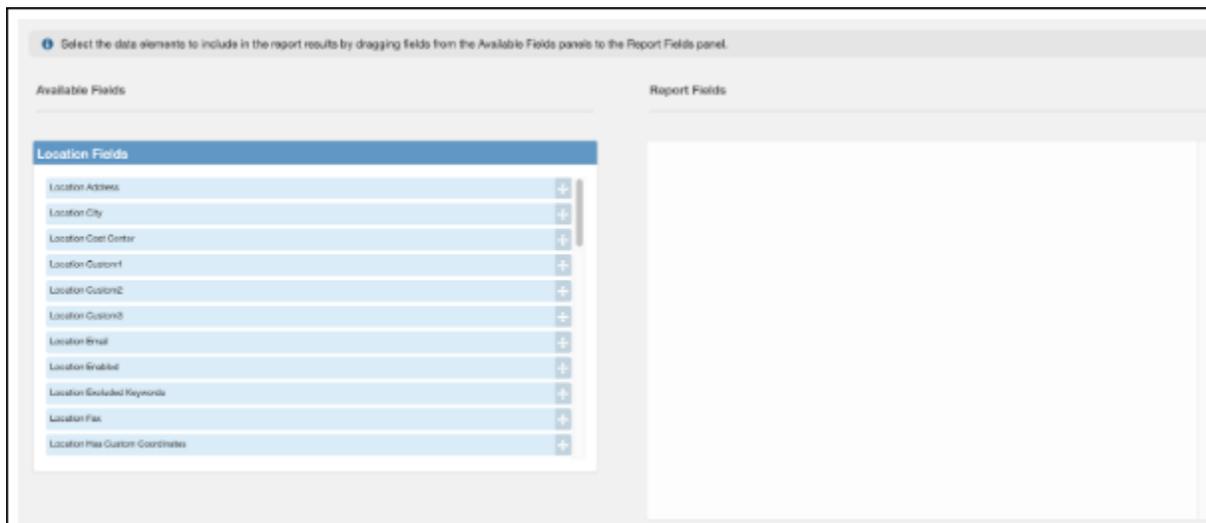


The reports tool has been set up to be “wizard” style.

Name your report something appropriate:

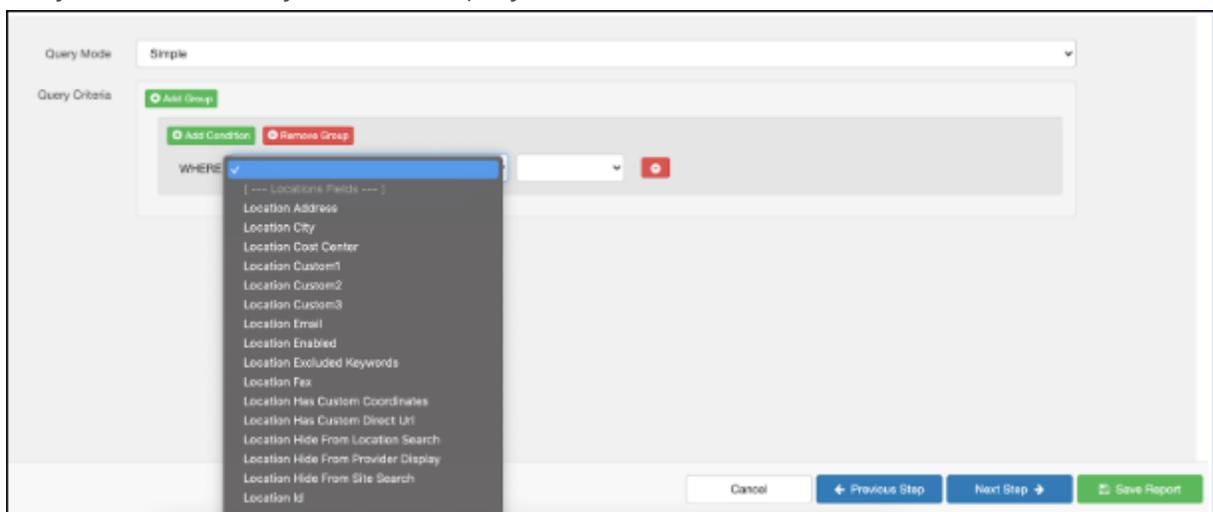


Drag the fields you want to have in your report from the Available Fields column to the Report Fields column:



If this is a report you'll run many times in the future for different reasons, click Save before adding in your conditions for query.

Add your conditions for your locations query:



Click **Next Step**.

## Events

The Events Content App allows consumers and patients to search, register, and pay for events that are associated with your organization.

To access Content App components from anywhere within CMS, click the Content Apps icon from the CMS left menu.

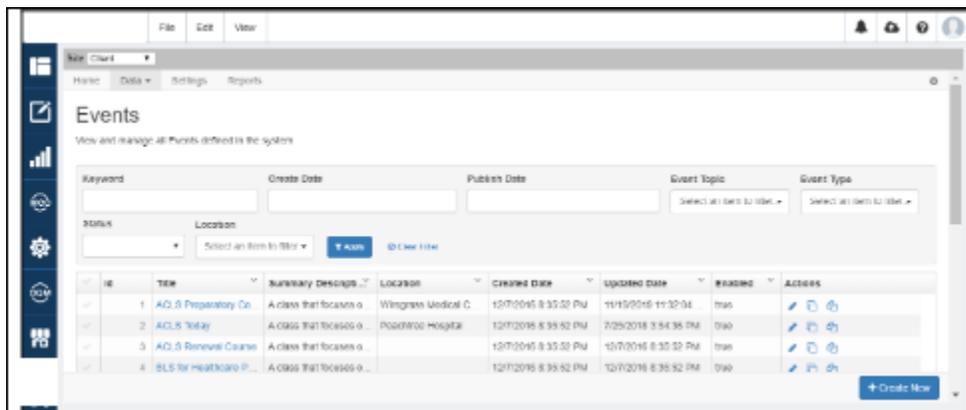


- **Settings** allows you to update the automated SEO settings, refresh the site search index, etc. You likely won't have to access settings very often.

## Events Module Navigation Options

Available tabs are listed below.:

- **Home** (Click this tab to return to the Content Apps console.)
- **Data (Events opens to this tab, by default.)**
- **Settings**
- **Reports**



## Event List – Filtered Search

From the **Home** tab page, you can perform a filtered search by category, narrowing your search results, as you make selections from the following:

- **ID** (number entry)
- **Keyword** (free-text entry)
- **Location** (drop-down, listing your hospital locations)
- **Create Date** (date picker)
- **Publish Date** (date picker)
- **Start Date** (date picker)
- **Event Topic** (drop-down, listing topics such as: ACLS CPR NRP COURSES, ACLS Topic, Bariatrics Weight Loss Surgery, Bone Health, Cancer, Cancer Support Groups to Transplant Organ, Weight Management, Wellness Programs, Women's Health Education)
- **Event Type** (drop-down, listing topics such as: Childbirth Education, Class, Fair or Health Fair, Free, Health Education, Online Class, Online Gift Shop, Screening, Seminar and Webinar)
- **Status** (drop-down, options are: All, Enabled, Disabled)

Search for an **Event** record by **Keyword**, **Create Date**, **Publish Date**, **Event Topic** (drop down list), **Event Type**, **Status** (All, Enabled, Disabled) or Location), with options to **Apply** (run the filter based on your selections), or to **Clear Filter**.

- **ID** (This field is generated by the system on creation of a new event.)
- **Title** (This is the title of the event.)
- **Summary Description** (This is the description of the event that was entered on creation.)
- **Location** (This is the location where the event will be held.)

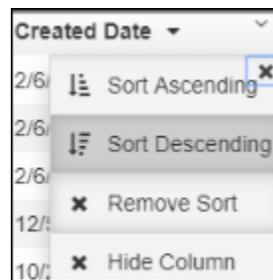
- **Created Date** (This is the date the event record was created.)
- **Publish Date** (This is the date the event record was updated.)
- **Actions** (Applicable to the selected record, or row, these are: **Edit**, **Copy Event** or **Copy Event and Occurrence**.)

If an event is disabled, it will still appear in the list, but the content row will show as grayed out.

### Using the column sorting options

There are filtering options for each column, or sortable field of the record. Sort Ascending, Sort Descending and Hide Column. Once a column has been sorted, the **Remove Sort** option becomes available.

There are filtering options for each column, or sortable field of the record. **Sort Ascending**, **Sort Descending** and **Hide Column**. Once a column has been sorted, the Remove Sort option becomes available.



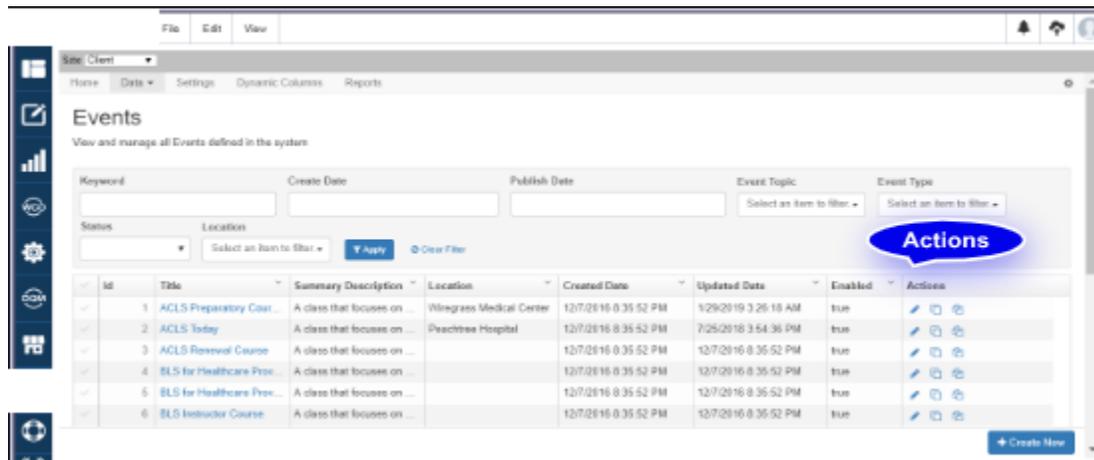
### Unhiding a hidden column

To unhide a hidden column, refresh the page to reset the grid.

### Using the Actions buttons

Under the **Actions** column are additional options that are applicable to a selected record, or row: **Edit**, **Copy Event** or **Copy Event and Occurrence**.

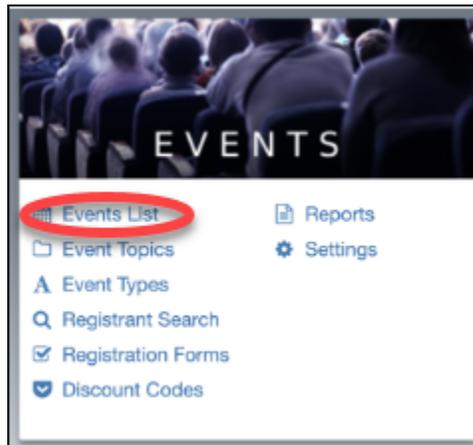
To select a record to perform an action on, use the checkbox button to the left of the record, then select the desired **Actions** option.



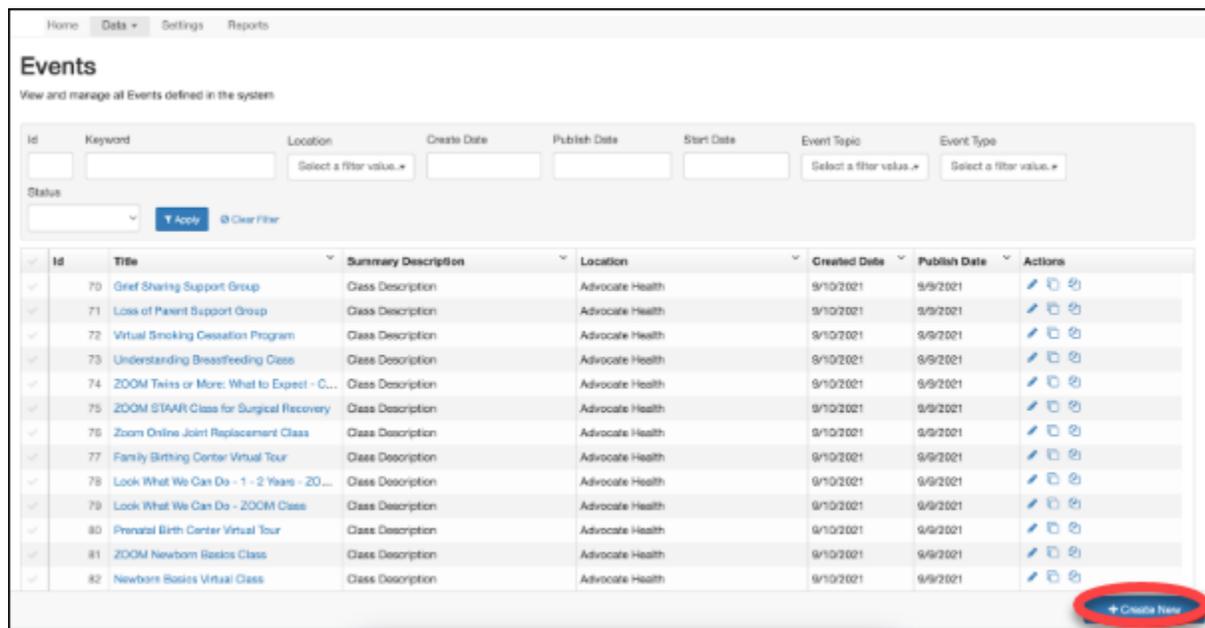
## Add, edit, delete Events

### Adding Events

To add an event, you will want to access the **Events list**.



In the bottom right-hand corner, click **Create New**:

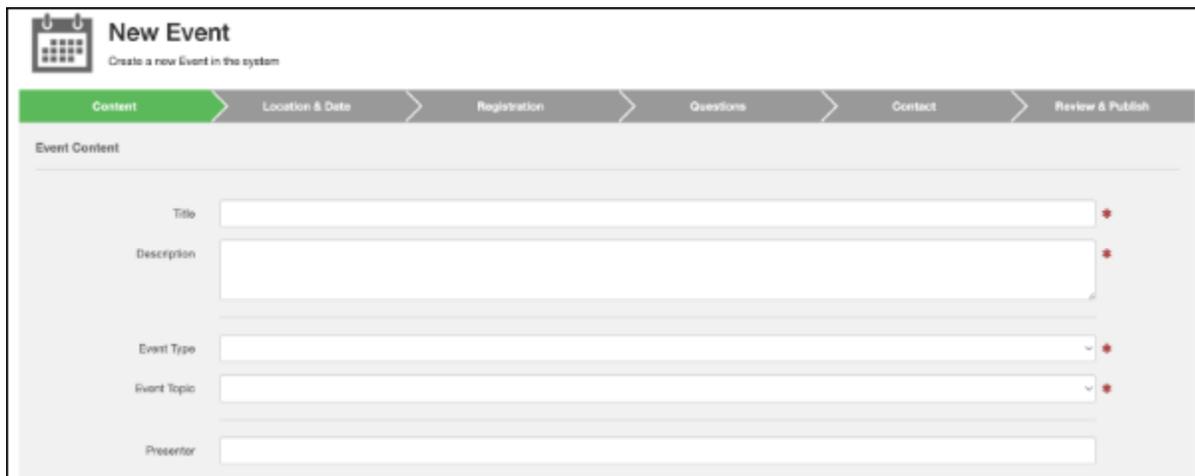


The screenshot shows the 'Events' management interface. At the top, there are navigation tabs for Home, Data, Settings, and Reports. Below the title 'Events', there is a subtitle 'View and manage all Events defined in the system'. A filter bar contains fields for Keyword, Location, Create Date, Publish Date, Start Date, Event Topic, and Event Type, along with a Status dropdown and 'Apply' and 'Clear Filter' buttons. The main area is a table with columns: Id, Title, Summary Description, Location, Created Date, Publish Date, and Actions. The table lists 13 events, all with 'Class Description' as the summary and 'Advocate Health' as the location. In the bottom right corner, a 'Create New' button is circled in red.

Id	Title	Summary Description	Location	Created Date	Publish Date	Actions
70	Grief Sharing Support Group	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
71	Loss of Parent Support Group	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
72	Virtual Smoking Cessation Program	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
73	Understanding Breastfeeding Class	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
74	ZOOM Twins or More: What to Expect - C...	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
75	ZOOM STAIR Class for Surgical Recovery	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
76	Zoom Online Joint Replacement Class	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
77	Family Birthing Center Virtual Tour	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
78	Look What We Can Do - 1 - 2 Years - ZO...	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
79	Look What We Can Do - ZOOM Class	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
80	Prenatal Birth Center Virtual Tour	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
81	ZOOM Newborn Basics Class	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]
82	Newborn Basics Virtual Class	Class Description	Advocate Health	9/10/2021	9/9/2021	[Edit] [Delete] [Share]

Event addition is built to wizard-style, so it walks you through the whole setup process. Red asterisked fields are required.





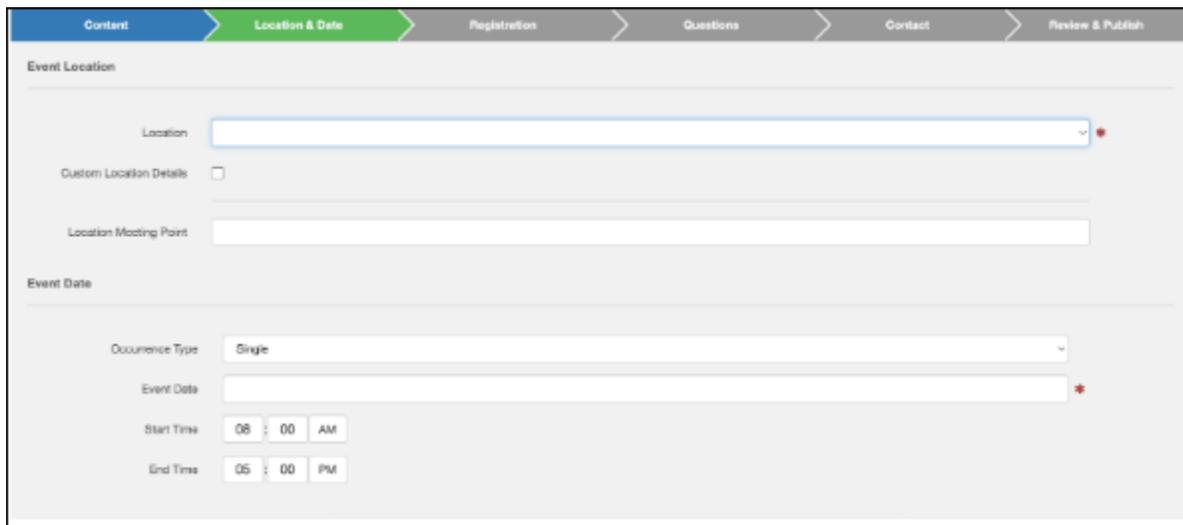
**Note:** in order for an event to be active, it has to be enabled, have a publish date set in the past, and have at least one active occurrence.

Enter the Content fields as prompted:

- **Title:** Enter the title of the event.
- **Description:** Enter a description of the event. There are no character limits here, but you may want to check with how the events look live on your site and mark down a number that works so that your events have some consistency to them.
- **Event Type:** Choose an event type from the drop-down options, such as: Childbirth Education, Class, Fair or Health Fair, Free, Health Education, Online Class, Screening, Seminar, Webinar. You can add additional event types <link to section on adding event types>, if needed.
- **Event Topic:** Choose an event topic from the drop-down options, such as: Bariatrics Weight Loss Surgery, Bone Health, Cancer, Cancer Support Groups, Community Classes, Continuing Education, Diabetes Programs, Employee Education, etc. You can add additional event topics <link to section on adding event topics>, if needed.
- **Presenter:** Enter the name of the presenter for the event. Note: this field is not required.
- **Attachments:** Click the Add button, then the Upload button to browse for single or multiple files to upload and associate to this event. The file size maximum is 50MB.

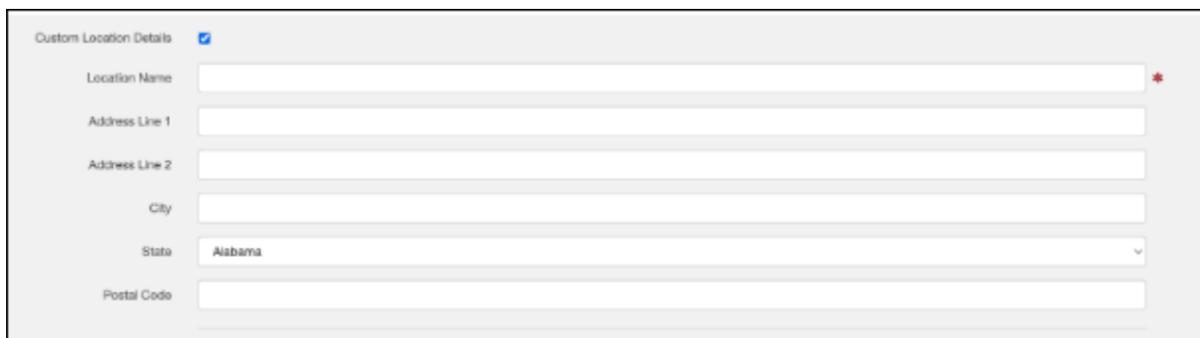
**Note:** You may see additional fields in your instance. Not all content apps setups are the same. You will have to outline for your team any specifics around fields that are unique to your organization.

Click **Next** when done to access the Locations details.



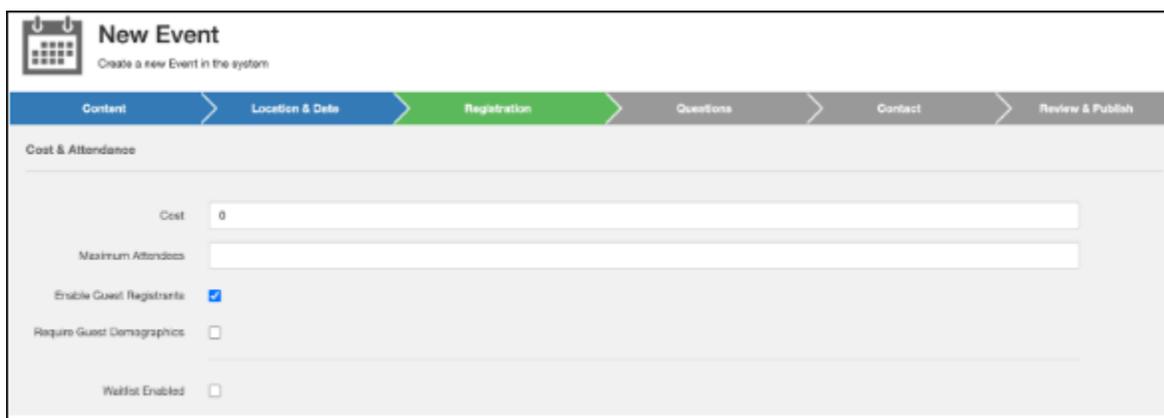
Choose the appropriate location from the dropdown. This will be populated by events that have been marked as Event Locations in the Locations content app. Location must be populated in order to continue adding a new event.

If, however, the event location does not exist in your content apps, you can click the Custom Location checkbox. You will then be presented with a whole list of new fields to enter the location information



Choose whether or not the event is a **Single Event**, **Open Event**, or **Recurring Event**.

Complete the event date and time information and click **Next Step** to continue to the Registration screen.



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- **Cost:** If there is a fee to attend your event, you will want to add that in the Cost field.
- **Maximum Attendees:** Enter the maximum number of attendees (including guests) for each occurrence of this event. Can be overridden at the occurrence level.)
- **Enable Guest Registrants:** If this checkbox is enabled, additional guest registrants can be added during registration.
- **Require Guest Demographics:** Clicking this box adds guest information fields for users to complete when registering for a class for a friend or family member.
- **Waitlist Enabled:** Checking this box allows for enrolling in a waitlist when the maximum number of attendees has been reached. **Note:** Supporting functionality and messaging must be enabled on the event widgets e.g. Details, Checkout, Confirmation etc.
- **Discounts Codes:** Use the available Add button to add any discount codes that can be applied to the cost of the event.



- **Allow Self-Cancellation:** Checking this box allows event registrants to cancel their own event registration using a cancellation link in their registration confirmation email.
- **Automatic Refunds:** Check this box to allow for automatic refunds of the registration costs for paid events when a registration is canceled.

**Note:** You may see additional fields in your instance. Not all content apps setups are the same. You will have to outline for your team any specifics around fields that are unique to your organization.

Click **Next Steps** to move onto the **Questions** screen:

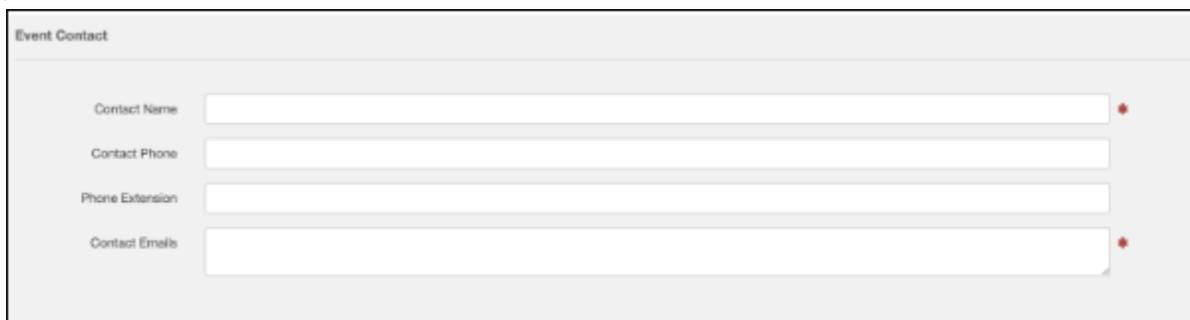


Click the **+Add button** to add a question, and you'll be presented with the following fields:



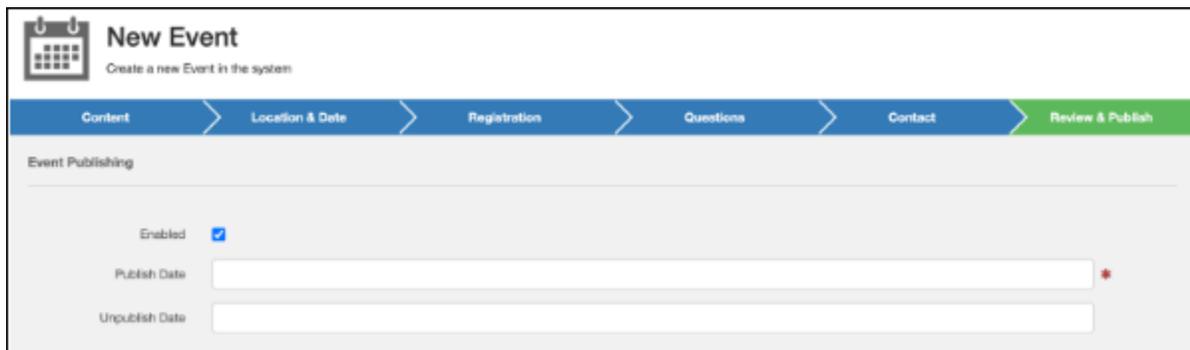
- **Question Type:**
  - **Qualifying Questions:** Add qualifying Yes/No questions that are presented before a user can complete registration. These questions require a “Yes” answer in order for the patient to complete registration.
  - **Survey Questions:** These questions are presented to the user during registration and can be marked as optional. Choose between text, date, or dropdown. If you choose dropdown, you will be presented with additional fields to complete to present the options to your users.
- **Question Order:** Allows you to choose the order in which your questions appear to users.
- **Question:** Enter the question for your users here.
- **Unqualified Message:** When a user answers with a question that disqualifies them from completing registration, this is the message they’ll receive.

If you don’t want to add any qualifying questions or survey questions, you can click **Next Step** to proceed to the **Contact** screen:



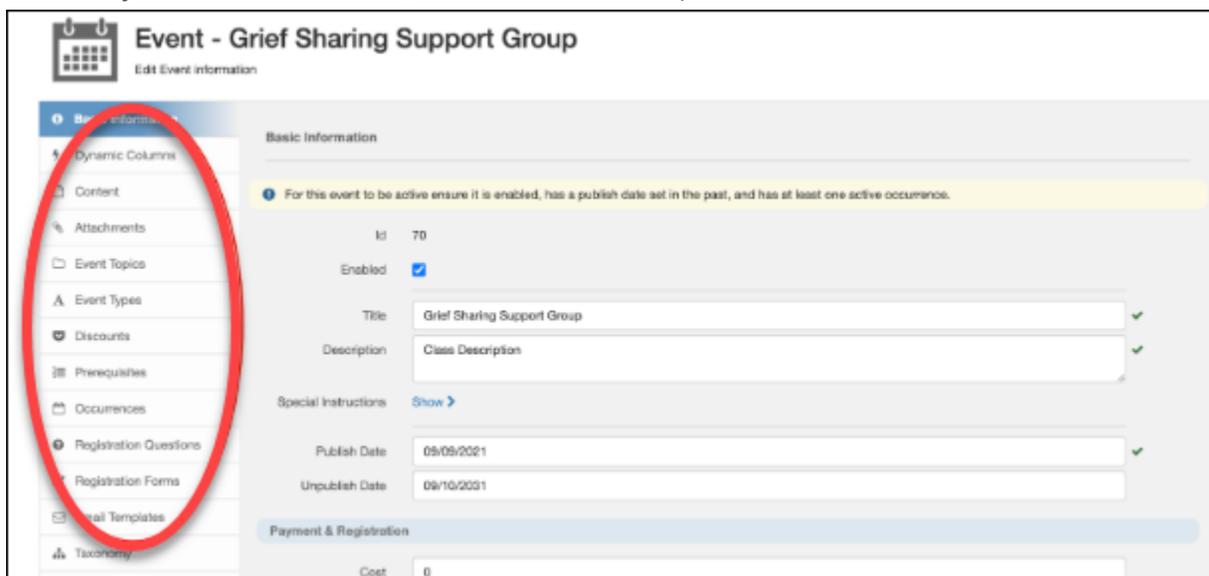
- **Contact Name:** Enter a contact name for the event in this free-text field.
- **Contact Phone:** Enter the contact phone number in the format it will be displayed.
- **Phone Extension:** Enter a phone extension for the contact phone number, if applicable.
- **Contact Email:** Enter the event contact’s email address in the correct format, separating multiple email addresses with semicolons.

Click Next Step to move onto the Review & Publish screen:



Here you'll be presented with a Publish Date (required) and Unpublish Date (optional) field. Below this, you will see all of the other information you have completed during the event set up. If you're satisfied and have completed your Publish Date field, click Save Event in the lower right hand corner.

Once you click **Save**, your view of the events entry will change, and you'll be presented with a new screen that now has left-hand navigation. This is, essentially, all of the fields you completed during event entry broken down into tabs, with a few additional options added in.



On this screen, you can now upload a new image. Hover over the calendar icon in the upper left corner and you'll see an option to **Upload** or **Browse**. Choose Upload and follow the steps presented to you to add a photo. Click **Save** when you're done.

+ Upload

🔍 Browse

## Event - Grief Sharing Support Group

Edit Event information

📄 Basic Information
Basic Information

⚡ Dynamic Columns
📄 Content

📎 Attachments
📁 Event Topics

📌 Event Types
📄 Discounts

!
For this event to be active ensure it is enabled, has a publish date

	Id	70
	Enabled	<input checked="" type="checkbox"/>
	Title	Grief Sharing Support Group
	Description	Class Description

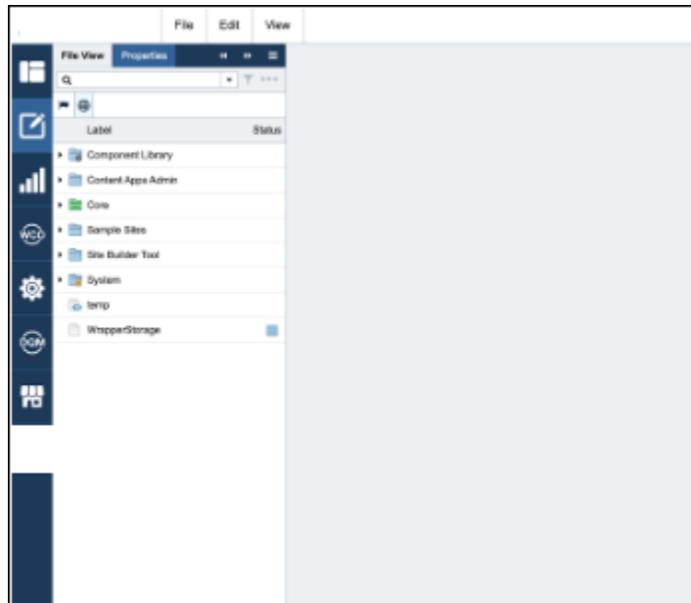
Other new options you'll have available to you include: Dynamic Columns, Content, Occurrences, Registration Forms, Email Templates, Taxonomy, and Direct URL History.

- **Dynamic Columns:** Dynamic Columns are created on a site-by-site level based on your organization's needs. You will have to outline your dynamic columns internally to ensure consistency for event administrators.
- **Content:** This WYSIWYG allows you to add more content about the event. Where and how it presents on your site, is dependent upon how your site was built. You will have to notate internally specifics regarding this field to ensure consistency for events.
- **Occurrences:** Recall that you must have an active occurrence in your event instance in order for it to be present on your site. This should automatically populate based on the information you added during event creation, but you can always check this tab to make sure you see the occurrences you would expect to see.
- **Registration Forms:** You can choose specific registration forms from this section. Click the Add button in the upper right to choose from available registration form templates. This is helpful when you have classes that require specific information (like due date for childbirth classes) that not all events will require.
- **Email Templates:** Choose from available emails for event registration, reminder and cancellation.
- **Taxonomy:** Add taxonomy [<link to taxonomy section>](#) to your events to make them more searchable. Note: taxonomy has to be added to your site first. Or you can add individual words to the "custom keywords" section. Separate keywords by commas.
- **Direct URL History:** This tab gives you a history of any URL changes that have occurred with your event. This may be an empty tab if no URL changes have occurred.
- **Notification and Roster Request Emails:** Under "Contacts & Notifications" you will see two additional fields and a checkbox for "Send Notifications" If you would like to add additional email addresses to receive Roster Notifications or generate roster requests on demand, those emails may be entered here.

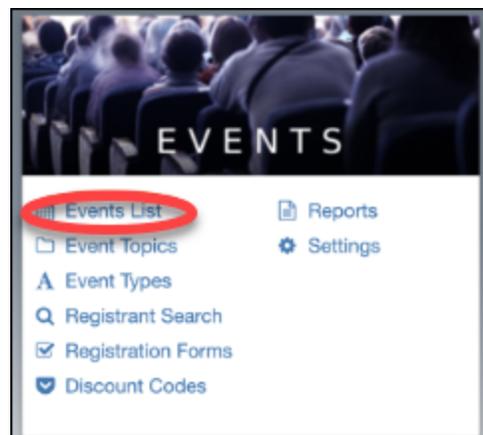
## Editing Events

If you need to edit an event, navigate to the **Events Content App**.

To access Content App components from anywhere within CMS, click the Content Apps icon from the CMS left menu.



To edit an event, you will want to access the events list.



Use the search options and filters at the top of the events list to find the event you need to edit:

**Events**  
View and manage all Events defined in the system

Once you have the resulting events based on your queries in the previous step, click on the event name or the pencil icon to the right to edit.

**Events**  
View and manage all Events defined in the system

ID	Keyword	Location	Create Date	Publish Date	Start Date	Event Topic	Event Type	Status
		Select a filter value				Select a filter value	Select a filter value	
								Apply Clear Filter

ID	Title	Summary Description	Location	Created Date	Publish Date	Actions
70	Infant Feeding Support Group	Class Description	Advocate Health	8/10/2021	8/9/2021	<input checked="" type="checkbox"/>  
71	Love of Parent Support Group	Class Description	Advocate Health	8/10/2021	8/9/2021	 
72	Virtual Smoking Cessation Program	Class Description	Advocate Health	8/10/2021	8/9/2021	 
73	Understanding Breastfeeding Class	Class Description	Advocate Health	8/10/2021	8/9/2021	 
74	ZOOM Tears or More: What to Expect - Class	Class Description	Advocate Health	8/10/2021	8/9/2021	 
75	ZOOM STAR Class for Surgical Recovery	Class Description	Advocate Health	8/10/2021	8/9/2021	 

Navigate to the field(s) that needs editing, make your edits, and click **Save**.

### Editing overview

Tabs on the left allow you to update the Edit screen by category.

- Basic Information
- Content
- Event Topics
- Event Types
- Taxonomy
- Discounts
- Prerequisites
- Occurrences
- Registration Form
- Email Templates
- Direct URL History

### Basic Information

**Basic Information** fields control the parent-level data for your event. Some inputs will carry forward to new occurrences as they are created. A checkmark beside the field on the right indicates that the field is required. They are as follows:

- **ID** (This is system-generated when the event is created.)
- **External ID** (If an external ID exists, it will display here. External IDs are created if COD10 is importing events from an external data source through a data integration via the API)
- **Enabled** (Enable/deactivate the event using this checkbox. This field must be enabled for an event to be indexed and found in site search and event search.)
- **Title** (This is the event title.)
- **Description** (Enter the description of the event.)
- **Special Instructions** (Enter any special instructions for the event)

- **Publish Date** (Begin typing in this date field to enter the publish date. The calendar widget displays for formatted selection. This field must be completed in order for this event to appear in the search filter options.) (ü)
- **Unpublish Date** (Begin typing in this date field to enter the unpublish date. The calendar widget displays for formatted selection. Your event content will be removed from display on this date.)
- **Cost** (If the event is paid, you can enter the cost here as a number. This value will be inherited by any new occurrences that are created)
- **Maximum Attendees** (If an event has a cap on attendees, enter the total number of registrants as a number. Leave blank if there is no cap i.e. unlimited)
- **Enable Guest Registrants** (Check if you want to allow users to register themselves as well as others)
- **Require Guest Demographics** (Check if you want to capture additional demographic information e.g. email, street address etc. for guest registrants)
- **Location** (Select the location of the event. This value will be inherited by occurrences created)
- **Cost Center** (If a cost center, as defined by your finance\accounting department, exists for payment reconciliation, enter it here)
- **Business Unit (Tier 3)** (This field is tied to an old application that is being sunsetted as of this writing. It can be ignored)
- **Contact Name** (Enter a contact name in this free-text field.)
- **Contact Phone** (Enter this information in contiguous numbers. The field auto-formats as a dash-delineated phone number, for example: 800-555-5555.)
- **Extension** (Enter the phone extension number, where applicable.)
- **Contact Emails** (Enter the contact emails for the event in email format. This input is associated with the event details widget token for contact email.)
- **Send Notifications** (Check this box to notify contacts.)
- **Notification Emails** (Enter one or more emails separated by a semicolon to receive notifications of new registrations, cancellations etc.)
- **Roster Request Emails** (Enter one or more emails separated by a semicolon that are authorized to request rosters for a given event\occurrence via the roster request widget)
- **Send Reminder Emails** (Select the days prior to an occurrence where registrants will receive a reminder email)
- **Custom Direct URL** (Check this box if you wish to override the auto-generated direct URL)
- **Direct URL** (If Custom Direct URL is checked, you can enter the direct URL here)
- **Custom Keywords** (These are keywords that will be associated with the event and will be indexed for event search purposes.)
- **Effective Keywords** (These are non-editable system-generated keywords that are related to the event and are used for event search purposes.)
- **SEO Page Title** (This is found in the <head> element. Title tags are often used on Search Engine Results Pages (SERPs) to display preview snippets for a given page and are important both for SEO and social sharing.)
- **SEO Page Description** (Also found in the <head> element, this describes what a page is about in 150 characters or less. In search results, this returns as the main descriptive text.)
- **SEO Custom Meta Tags** (Use custom <meta> tags to provide search engines with additional information about your pages. Search engines use this information to create rich snippets or enable sorting of search results.)
- **SEO H1** (This heading 1 tag element is used near the top of the page as the page version of the page title, or to describe the page's content and is important for optimal SEO.)
- **SEO Primary Keyword** (The primary keyword is the one searched most frequently.)

- **SEO Secondary Keyword** (The secondary keyword is the one searched the second-most frequently.)
- **SEO Canonical URL** (The tag attribute bears similarity to a 301 redirect, but it communicates to search engines that multiple pages should be considered as one, without actually redirecting visitors to the new URL, so that you can still track visitors separately to unique URL versions, such as: Payment Gateway (PayFlow Pro, Authorize.net). The term, canonical, refers to conforming to an accepted rule or procedure.)
- **Hide from Site Search** (Check this box to hide event from site search results)
- **Hide from Event Search** (Check this box to hide event from event search results)
- **Custom Field 1–3** (Add your Custom Field content.)

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### Dynamic Columns

Custom inputs created as dynamic columns assigned to the top-level event record can be edited in this tab. Dynamic columns for your instance will be unique.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### Content

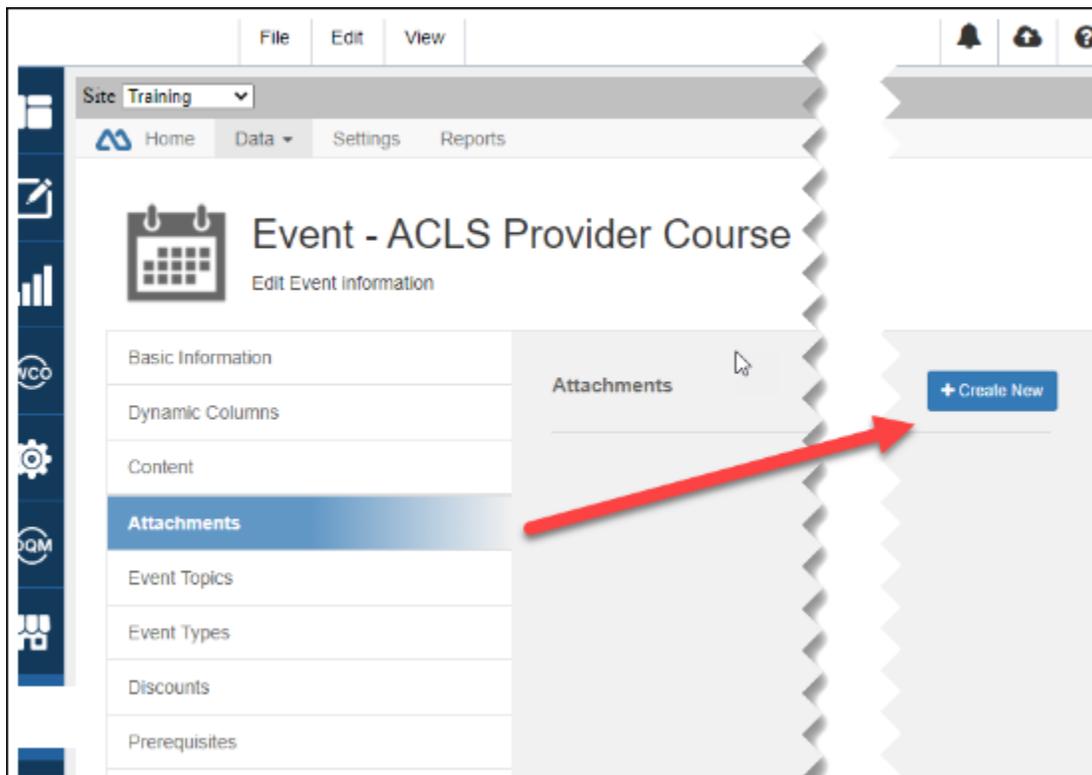
Separate from the description, the content tab contains a WYSIWYG editor which allows for the full description and content surrounding the event to be maintained. This is displayed via a token in the event details widget.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### Attachments

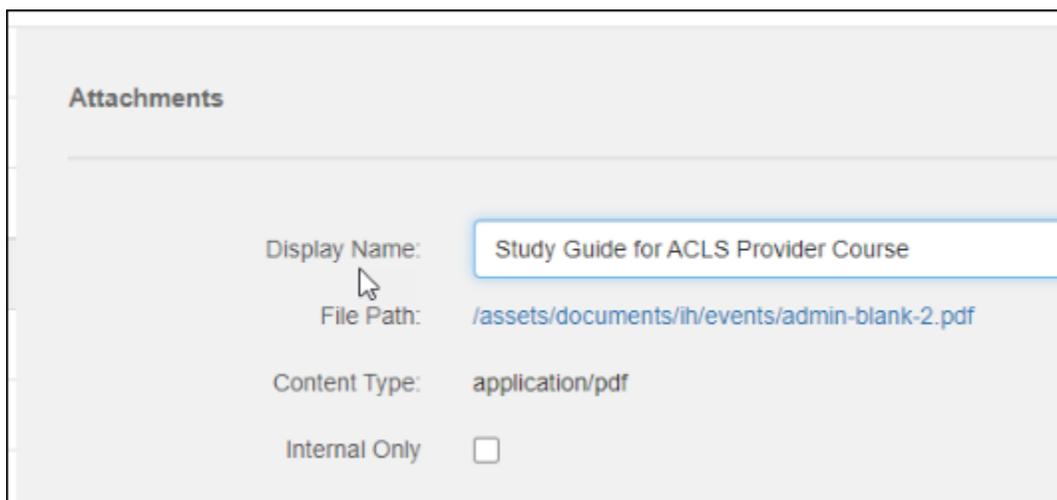
Any documents associated with an event (e.g. study guides, calorie counter etc) can be uploaded and stored as part of the event record. Links to the attachments are displayed via a token in the event details widget.

On the attachments tab, click “**Create New**” in the top right corner.



Click **Upload** and select the file you wish to upload as an attachment. Then click '**Save**' upload and attach the document to the event.

Once uploaded, you can edit the file name displayed in the event details widget. By default, the file name will show as the display name. After entering a new display name, click "**Save**"



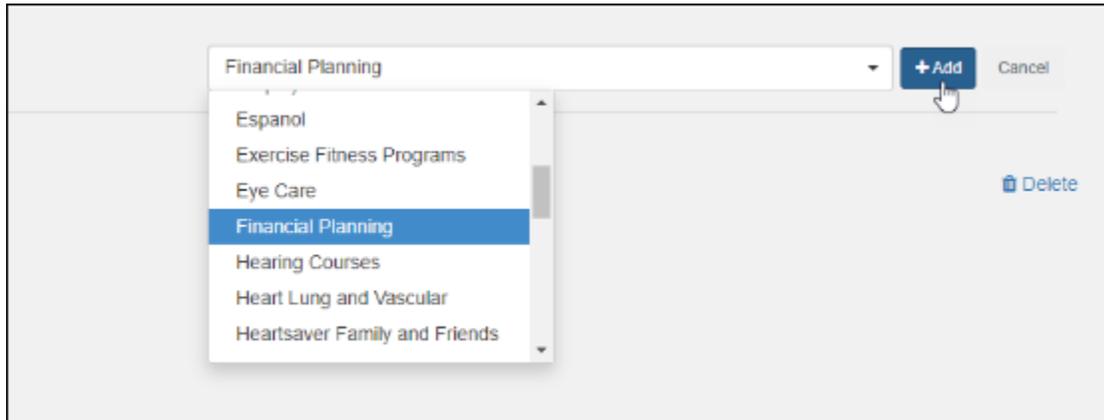
**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

## Event Topics

The event creation wizard requires and allows for only one topic to be assigned to an event during initial setup. Once created you can assign additional topics to an event.

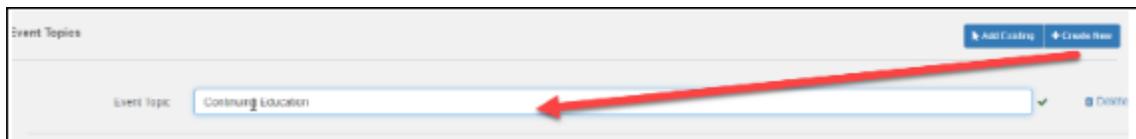
Click the event topics tab and then select either **Add Existing** or **Create New**.

If **Add Existing** is selected, a modal window of available topics will appear. You can add a single topic or multiple topics. Select the topic(s) you wish to add then click **Add Event Topics**



If you need to create a new topic, click **Create New** a textbox will appear where the new topic should be entered.

**Note:** Topics created here will be added to the global list of event topics and will be available for use by other events.



You can remove event topics by clicking Delete next to the topic to be deleted.

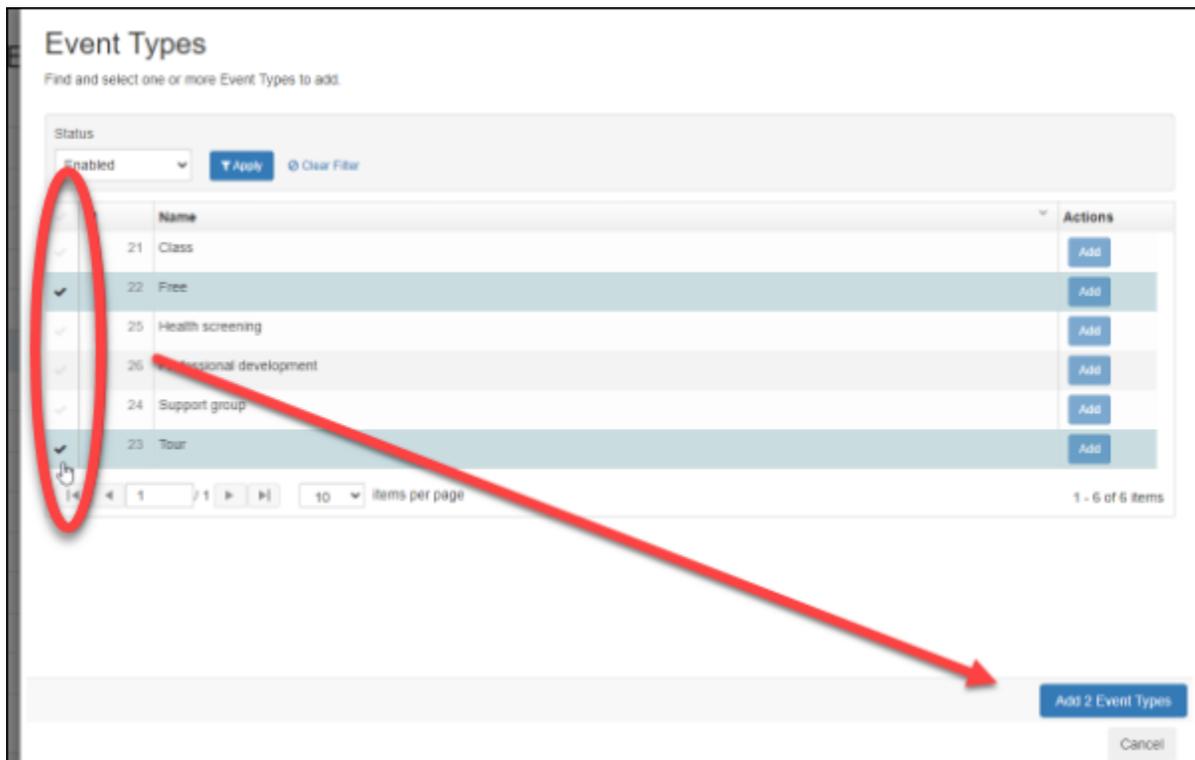
**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

## Event Types

The event creation wizard requires and allows for only one type to be assigned to an event during initial setup. Once created you can assign additional type(s) to an event.

Click the event types tab and then select either **Add Existing** or **Create New**.

If **Add Existing** is selected, a modal window of available types will appear. You can add a single type or multiple types. Select the type(s) you wish to add then click **Add Event Types**



If you need to create a new type, click **+Create New** a textbox will appear where the new type should be entered.

**Note:** Types created here will be added to the global list of event types and will be available for use by other events.

You can remove event types by clicking **Delete** next to the types to be deleted.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

## Discounts

In order for a registrant to use a discount code on an event, that code must be assigned to a given event. This allows for common codes to be used across events as needed without having to create individual discounts for each event.

Click the **Discounts** tab then select **Add Existing**. A dropdown of available discounts will appear. Select the one you wish to add then click **+Add**. Repeat these steps for any additional discounts you would like to add.

You can remove discounts by clicking **Delete** next to the discount to be deleted.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

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## Prerequisites

If a user is required to complete a prerequisite class e.g. an “intro to..” class or “Level I” prior to taking another class you can create an association between the two events. This allows prerequisites to be listed on the event details page.

**Note:** COD10 does not offer validation that a user has successfully completed a prerequisite class during the registration process. It only lists the classes flagged as a prerequisite for a given class.

Click the **Prerequisites** tab then select **Add Existing**. A list of all classes in content apps will be displayed. Select the one you wish to add then click **+Add**. Repeat these steps for any additional classes you would like to add as a prerequisite.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

## Occurrences

See the managing occurrences section in this document.

## Registration Questions

Registration questions consist of two types of questions: **Qualifying** and **Survey**. Qualifying questions require a user to answer “Yes” before proceeding to the registration for an event. They can be used to screen registrants that may not meet certain criteria for an event e.g. minimum age, vaccination status, planned birth at a given hospital etc. Survey questions are added to the registration form as free text entry fields. (Note: Free text entry was built to accommodate data integration with external systems that do not support structured data inputs such as a date, select, number. If you don’t require integration with a third party with these restrictions, it is advised to use the registration forms functionality to capture additional data from registrants)

### Qualifying Questions

Click on the **Registration Questions** tab and click **+Create New**. Select **Qualifying** from the Question Type dropdown menu. If you have multiple qualifying questions, enter a number for the **Order** in which you want the qualifying questions to appear as each question will display in the order defined. Enter the text of the question in the **Question** input. In the **Unqualified Message** input, enter the text you wish to display should a registrant answer “No” to a qualifying question.

To add additional qualifying questions repeat the steps above, making sure to set the order of qualifying questions by incrementing the number in the **Order** input.

### Survey Questions

Click on the **Registration Questions** tab and click **+Create New**. Select **Survey** from the question type dropdown menu. If you have multiple survey questions, enter a number for the **Order** in which you want them to appear. (All survey questions appear on the registration form, this number defines the order from top to bottom in which they appear.) Enter the text of the question in the **Question** input.

To add additional survey questions repeat the steps above, making sure to set the order of survey questions by incrementing the number in the **Order** input.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### Registration Forms

Click the **Registration Forms** tab and click **+Add Existing**. Select the registration form you would like to add to the event from the dropdown menu then click **+Add**.

**Note:** Instructions on creating a registration form are available in the **Creating and Editing Registration Forms** section of this document.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### Email Templates

To select which confirmation, reminder and cancellation (if applicable) emails are sent to registrants click the **Email Templates** tab.

**Note:** Events will use the default email template, changes to this area are only necessary if you would like to send emails using another template or create a custom email ad hoc template for an event. Under each of the three headings, select a new template from the **Template Name** dropdown menu.

If **Custom** is selected, a window will appear allowing you to customize the template in the same way you would create a new template. The difference being that this customization will not be saved as a new template available for use on other events.

The process for creating a custom template on an individual event is the same as creating a shared email template. See the **Creating Email Templates** section of this document for instruction.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the edit screen. Choose **Save and Return to the List** to commit your changes and return to the list page.

### The Taxonomy Tab – Events

Associate terms from the taxonomy hierarchy to individual events, using the **Taxonomy** tab in the **Event Edit Screen**. In the **Taxonomy Terms** field, begin typing any taxonomy term from the hierarchy and the list will expand with all available options, beginning with the letters you enter.

Select a taxonomy term from the list. In the example below, we chose Heart and Heart Condition. Click **Save**. The **Effective Keywords** field expands to include Heart and Heart Condition, plus all child terms.

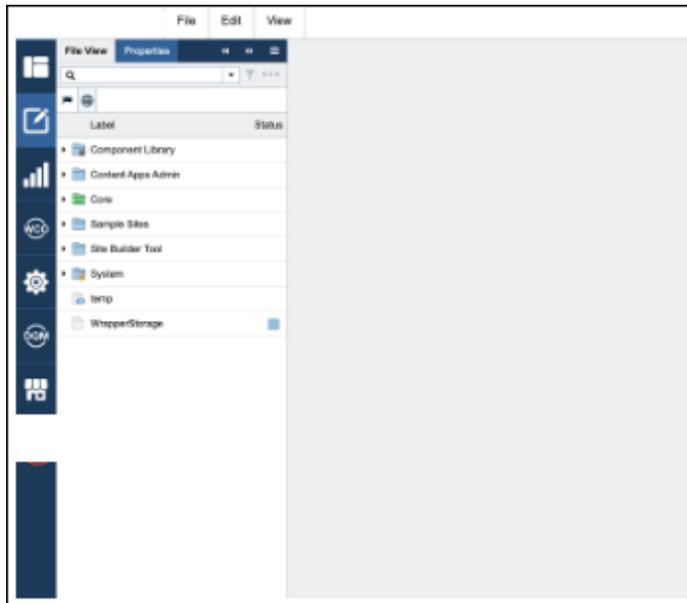
**Custom Keywords** and **Excluded Keywords** fields have been moved to this tab as well, as they are interrelated. These fields function as previously. You can still add custom keywords and exclude specific keywords to form this final **Effective Keywords** list for the event record.

### Deleting Events

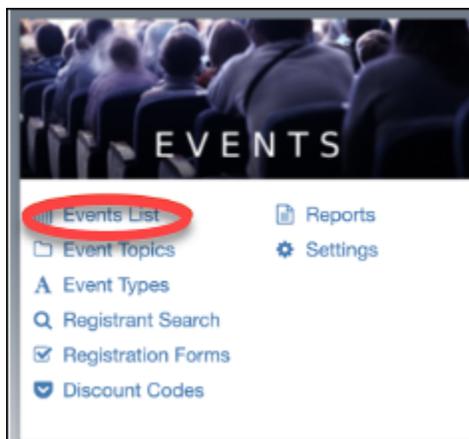
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If you need to delete an event, navigate to the Events Content App. Keep in mind that if you delete an event, you will lose any information associated with the event. It may make the most sense to disable or unpublish the event instead of deleting it.

To access Content App components from anywhere within CMS, click the Content Apps icon from the CMS left menu.



To delete an event, you will want to access the **Events List**.



Use the search options and filters at the top of the events list to find the event you need to delete:



Once you have the resulting events based on your queries in the previous step, click on the checkmark to the left of the event name and then click the **Remove** button in the bottom right of the screen..

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Home Data Settings Reports

## Events

View and manage all Events defined in the system

Keyword  Location  Create Date  Publish Date  Start Date  Event Topic  Event Type  Status

id	Title	Summary Description	Location	Created Date	Publish Date	Actions
<input checked="" type="checkbox"/>	70 Grief Sharing Support Group	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	71 Loss of Parent Support Group	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	72 Virtual Smoking Cessation Program	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	73 Understanding Breastfeeding Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	74 ZOOM Terms or More: What to Expect - Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	75 ZOOM STARR Class for Surgical Recovery	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	76 Zoom Online Joint Replacement Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	77 Family Birth Center Virtual Tour	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	78 Look What We Can Do - 1 - 2 Years - ZOOM Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	79 Look What We Can Do - ZOOM Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	80 Prenatal Birth Center Virtual Tour	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	81 ZOOM Newborn Basics Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	82 Newborn Basics Virtual Class	Class Description	Advocate Health	9/10/2021	9/9/2021	
<input type="checkbox"/>	83 Breastfeeding 101 ZOOM Class	Breastfeeding 101 will give you the basics to hel...	Advocate Cordell Medical Center	9/10/2021	9/9/2021	

## Event Occurrences

To access **Occurrences**, go to **Content Apps > Events (Events List in the default Data tab)**. Select an event to edit by clicking the event **Name** or by clicking the **Edit** (pencil) icon. When the **Edit** screen opens, in the left panel, choose the **Occurrences** tab. **Active Occurrences** display here. From this screen you can manage an existing occurrence or create a new occurrence.

### Create new occurrence

Click the **Create New** button to create a new event occurrence. You will be presented with a screen with the following fields. Required fields are noted in red.

- **Enabled** (Check this box to enable display of the occurrence.)
- **Presenter** (This field holds the name of the event occurrence presenter.)
- **Special Instructions** (Click the Show/Hide button to reveal a content WYSIWYG editor that allows you to format your message as users will view it.)
- **Location\*** (By default, the occurrence will inherit from its parent event.)
- **Custom Location** (Check this box to indicate this as a custom location.)
- **Custom Name** (This field enables if the Custom Location checkbox is enabled. Enter the name of the location here, if applicable.)
- **Address Line 1** (Enter address line 1 of location.)
- **Address Line 2** (Enter address line 2 of location, for example: Suite 100.)
- **City** (Enter the city of the location.)
- **State** (Enter the state of the location.)
- **Postal Code** (Enter the ZIP code of the location.)
- **Latitude** (Read-only, unless enabled by the geocode this address button. Enter the latitude of the location. Latitude is the angular distance of a place north or south of the earth's equator, usually expressed in degrees, for example: 51° N. To find the latitude and longitude of a location, use a latitude and longitude finder such as Google Maps.)
- **Longitude** (Read-only, unless enabled by the geocode this address button. Enter the longitude of the location. Longitude is the angular distance of a place west or east of the earth's equator, usually expressed in degrees, for example: 20° E.)
- **Cost Center** (If using PayflowPro or Authorize.net, enter the name of the department or other type of unit within your organization to which costs may be charged, for accounting purposes.)

- **Standard Cost** (Enter the price of admission in this free-text field.)
- **Allow Pay Onsite** - Allow users to register for a paid event without entering CC info. This feature will only be available if the Cart contains pay onsite events exclusively
- **Automatic Refunds** - If using the Tempus payment gateway, CODIO can automatically issue refunds to the card used if self-cancellation is enabled.
- **Registration Enabled** (Check this box to enable registration for your event.)
- **Registration Open Date** (Enter the event occurrence registration open date, using the calendar widget that displays when you click the field. The date format is mm/dd/yyyy.)
- **Registration Close Date** (Enter the event occurrence registration close date, using the calendar widget that displays when you click the field. The date format is mm/dd/yyyy.)
- **Maximum Attendees** (Enter a number in this field by which to restrict the number of attendees.)
- **Maximum Guest Attendees** (Specify the maximum number of guests, or additional registrants for this event occurrence. If the maximum number of additional registrants is reached, the Add Additional Registrants button disables for the registrant, with a displayed message, stating that the maximum number of additional registrants has been reached.)
- **Require Guest Demographic Info** (Check this box to include guest demographic information.)
- **Availability** (Seat availability is display only, auto-generated based on Maximum Attendees.)
- **Allow Self-Cancellation** - Allow users to cancel their registration to this class. (NOTE: Requires configuration of a cancellation widget.)
- **Waitlist Enabled** - Allow users to place themselves on the waitlist if the event has reached capacity.
- **Maximum Waitlist Size** - Number of available waitlist spots (If this is reached, the Add to Waitlist button will be removed from the occurrence on the event details page)
- **Waitlist Response Time** - Number of hours a user has to respond to the waitlist notification email before they are removed from the waitlist.
- **Contact Name\*** (Enter the name of the event occurrence contact.)
- **Contact Phone** (Enter this information in contiguous numbers. The field auto-formats as a dash-delineated phone number, for example: 800-555-5555.)
- **Phone Extension** (Phone extension of contact phone if applicable)
- **Contact Email\*** (Enter the contact emails for the event in email format. Can be displayed on the front end via the details widget)
- **Send Notifications** - Will notify listed emails of new registrations and cancellations.
- **Notification Emails** (Comma separated list of emails that will receive notifications e.g. new registration and cancellations)
- **Roster Request Emails** (Comma separated list of emails that are able to request a roster for a given occurrence of an event.)

**Note:** An occurrence must be enabled and have a start date in the future in order to show as an active occurrence on the event details page. Registration must be enabled with a registration start and end date within the current calendar time frame in order to allow for users to register for the event.

You can delay the onset of registrations by setting a registration date in the future (with registration enabled.) The registration button will show starting at that date and time. The same is true for registration end date. If you wish to end registration before the start date\time of an occurrence you can set that in the occurrence as well.

**Note:** Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save and Continue** to commit your changes and remain in the edit screen where you can **assign a date and time** to the occurrence.

### Setting the meeting date and time for a newly created occurrence

A newly created occurrence will be created as an “open” occurrence which means it has no set date and time. (See types of “Types of Occurrences and How to Create Them” later in this document)

To create a single occurrence or series occurrence, click “Manage Dates” in the left column and select a date and time for the occurrence to create a single occurrence or multiple dates and times to create a series occurrence.

### Manage existing occurrences

For our example below, we chose an event named Event - ACLS Preparatory Course 2 Day Session with an **Active Occurrence (ID 495)**. Table view, or grid fields are as follows:

- **ID** (This ID is system-generated when the event occurrence is created.)
- **Date & Time** (This is the date and time of the event occurrence.) Click to edit this event occurrence record.)
- **Location** (This is the location of the event occurrence, whether All, Enabled or Disabled.)
- **Presenter** (This field holds the name of the event occurrence presenter.)
- **Contact** (This field holds the name of the event occurrence contact.)
- **Edit** (Click the **Edit** pencil icon to edit this event occurrence record.)
- **Run Roster Report** (Click the **Run Roster Report** (people) icon to run a roster report for this event occurrence.)

Once in the **Edit** view, select **Occurrences** from the left navigation tabs. The **Edit** [Event Occurrence] screen displays, with the **Event** title and the following editable fields. **ID** (This is the read-only **Event Occurrence ID** number that is system-generated on creation of the record.)

- **Enabled** (Check this box to enable display of the occurrence.)
- **Registration Enabled** (Check this box to enable registration for your event.)
- **Include Guest Demographic Info** (Check this box to include guest demographic information.)
- **Maximum Attendees** (Enter a number in this field by which to restrict the number of attendees.)
- **Maximum Guest Attendees** (Specify the maximum number of guests, or additional registrants for this event occurrence. If the maximum number of additional registrants is reached, the Add Additional Registrants button disables for the registrant, with a displayed message, stating that the maximum number of additional registrants has been reached.)
- **Notify Contacts** (Check this box to notify contacts.)
- **Location** (Check this box to indicate this as a custom location.)
- **Custom Location** (Check this box to indicate this as a custom location.)
- **Custom Name** (This field enables if the Custom Location checkbox is enabled. Enter the name of the location here, if applicable.)
- **Address Line 1** (Enter address line 1 of location.)
- **Address Line 2** (Enter address line 2 of location, for example: Suite 100.)
- **City** (Enter the city of the location.)
- **State** (Enter the state of the location.)
- **Postal Code** (Enter the ZIP code of the location.)

- **Latitude** (Read-only, unless enabled by the geocode this address button. Enter the latitude of the location. Latitude is the angular distance of a place north or south of the earth's equator, usually expressed in degrees, for example: 51° N. To find the latitude and longitude of a location, use a latitude and longitude finder such as Google Maps.)
- **Longitude** (Read-only, unless enabled by the geocode this address button. Enter the longitude of the location. Longitude is the angular distance of a place west or east of the earth's equator, usually expressed in degrees, for example: 20° E.)
- **Presenter** (This field holds the name of the event occurrence presenter.)
- **Contact Name** (Enter the name of the event occurrence contact.)
- **Contact Phone** (Enter this information in contiguous numbers. The field auto-formats as a dash-delineated phone number, for example: 800-555-5555.)
- **Contact Phone Extension** (Enter the phone extension number, where applicable.)
- **Contact Email** (Enter the contact emails for the event in email format.)
- **Availability** (Seat availability is display only, auto-generated based on Maximum Attendees.)
- **Special Instructions** (Click the Show/Hide button to reveal a content WYSIWYG editor that allows you to format your message as users will view it.)
- **Show** (Click the Show/Hide button to reveal a content WYSIWYG editor that allows you to format your message as users will view it.)
- **Standard Cost** (Enter the price of admission in this free-text field.)
- **Allow Pay Onsite This feature will only be available if the Cart contains pay onsite events exclusively** (Read-only)
- **Cost Center** (Enter the name of the department or other type of unit within your organization to which costs may be charged, for accounting purposes.)
- **Registration Open Date** (Enter the event occurrence registration open date, using the calendar widget that displays when you click the field. The date format is mm/dd/yyyy.)
- **Registration Close Date** (Enter the event occurrence registration close date, using the calendar widget that displays when you click the field. The date format is mm/dd/yyyy.)

### Types of Occurrences and how to create them

There are three types of occurrences, the details of which are outlined below.

**Open Occurrence:** An occurrence for which there is no set date and time. Open occurrences will show under event details until they are disabled. Open occurrences can be useful for ad hoc/self-guided study type of events. It's important to note that if using an open occurrence for this type of event, making sure capacity is set to infinite or creating new occurrences as needed is an actively managed activity.

Open occurrences can also be useful for events that meet on a regular schedule where no registration is required e.g. Support Group or Walking Clubs. Details regarding the meeting times should be spelled out elsewhere in the event details. i.e. "Meets every Tuesday in the Oak Ridge Mall atrium at 8am" This eliminates the need to continuously create occurrences.

**Note: When you first create a new occurrence and save, said occurrence will be created as an open occurrence.**

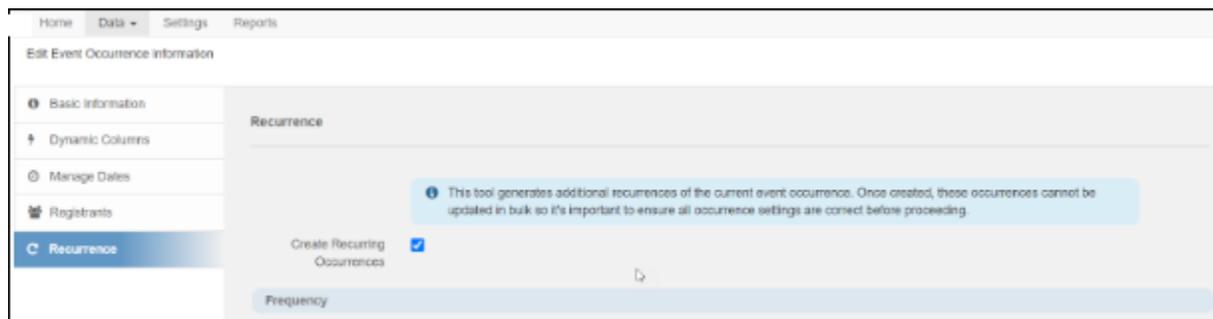
**Single Occurrence:** A single occurrence is the most common occurrence and meets a specified date and time. e.g. Sept 25 from 6-8 p.m.

**Series Occurrence:** A series occurrence is a single occurrence that meets multiple dates and times. The most common example is a childbirth class that meets over the course of a weekend or at the same time over consecutive weeks. e.g. Friday 9/25 from 5–8 pm, Saturday 9/26 from 9 am–4 pm and Sunday 9/27 from 1–5 pm A user needs only to register once to attend all sessions in the series.

### Creating recurring occurrences

If your event has multiple occurrences that meet on a set schedule, it is possible to use an occurrence to create multiple individual occurrences in the future using the ‘recurring occurrences’ tool.

To start, select an occurrence that will serve as the template as all the data contained within that occurrence will be copied over to the newly created occurrences. From the occurrence details, select “Recurrence” and then select “Creating Recurring Occurrence” being sure to make note of the information in the blue box.



Select the frequency of the recurrence e.g. daily, weekly or monthly and the interval.

Depending on which option is selected, you may be presented with more options.

Select the recurrence start date and end date as well as a start and end time. Recurrences will be created on all dates between these two dates that meet the frequency criteria.

Click “Save and Return to List” where you will see all the new occurrences you have just created. You can adjust or delete occurrences that may fall on a holiday by selecting the occurrence and managing the dates.

### Registration Forms

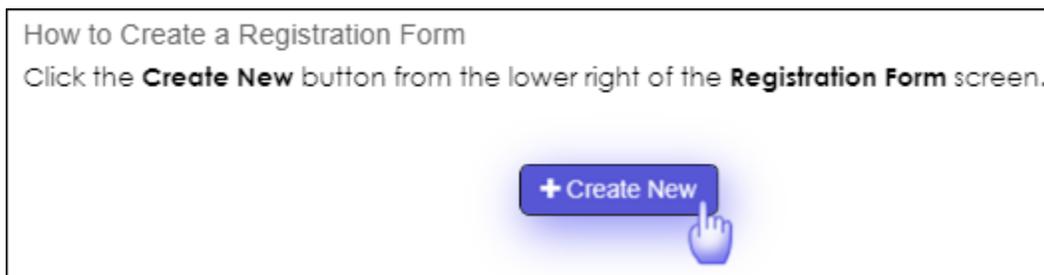
The **Event Registration Forms** screen allows you to create, edit or remove custom **Event Registration Forms**.

To access this page, choose the **Registration Form** link from the main **Content Apps Events** menu, or from the **Data** tab drop-down menu option in the **Events Content App**.

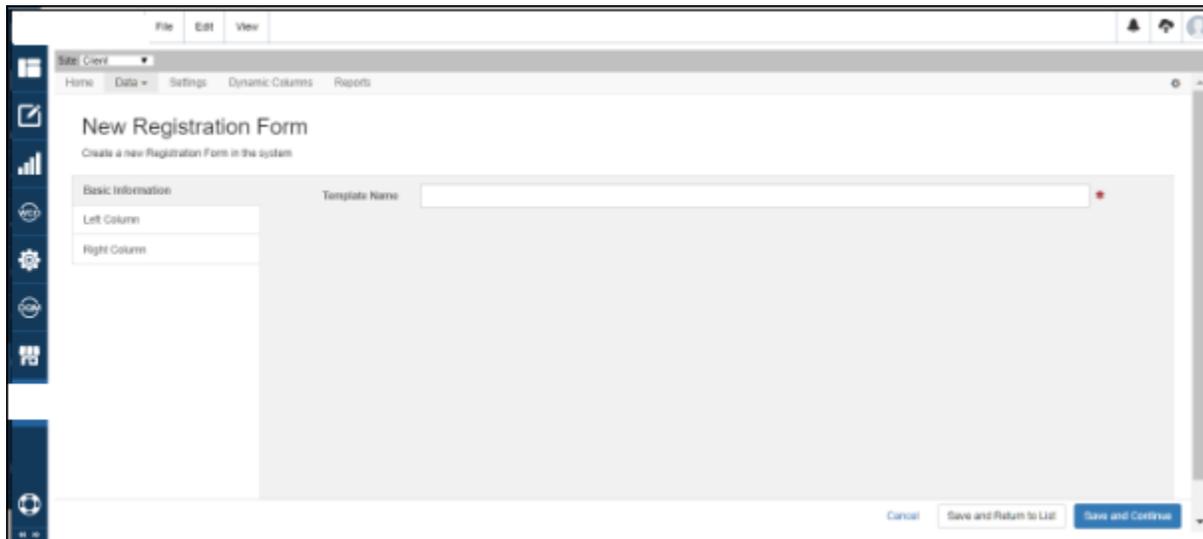


The **Event Registration Forms** page displays. Each row, or record displays columns as listed below. The columns are sortable, as described in the [Using the Column Sorting Options](#) topic.

- **ID** (Filter **Event Registration Forms** by the system-generated ID that was created when the form was created.)
- **Form Name** (This is the form or **Template Name** entered when the **Event Registration Form** was created. Click this link to open the edit screen for the form. See)
- **Actions** (Click the **Edit** pencil icon to edit the form on this row (alternate method). The edit screen for the form displays. Click the **Copy** icon to generate a copy of the form here.)



The **New Template** screen displays, as shown below. Create a Registration Form by defining a Template Name for your template in the required field.



### How to edit, copy and repurpose a Registration Form

To copy an existing registration form, simply click the copy icon as indicated in the image below. Your copied form is immediately ready for use at the bottom of the list, with a confirmation message stating that the **Event Registration Form** was successfully copied.

Click the form name or pencil (**Edit**) icon to rename the form or revise the content by left and right columns.



For our example, the Registration Form - Waitlist Copy opens to the **Edit Registration Form** screen, defaulted to the **Basic Information** tab, where you can change the name of your template.

There are three navigation tabs:

- **Basic Information**
- **ID** (This is the read-only **Event Registration Template ID** that was system-generated when you copied the record.)
- **Template Name** (Edit your template name using this free-text entry field.)
- **Left (or Right) Column**
- **Field Name** (This is the non-editable field name.)
- **Field Label** (This is the display name of the field. Add the text you want the registrants to view. For example: Add Me to the Cardio Care Newsletter.)

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- **Field Description** (Enter descriptive text about the field to give your registrants a better idea of how to use it. In our example above, we added a 415-character description for the newsletter.)
- **Is Required** (Check this box to make this field required. When enabled, the user must respond in order to save the form.)
- **Data Type** (This is the read-only data type of the field. In this case: Drop-down.)
- **Drop-down Options** (Add your drop-down options in this free-text entry field.)

Button options are **Cancel**, **Save** and **Return to List** and **Save**.

Once your form has saved successfully, as demonstrated above, access the **Scheduled Task - Events Site Search Synchronizer** to synchronize your changes, so they can be seen on the published page

### WebMD Ignite Best Practices:

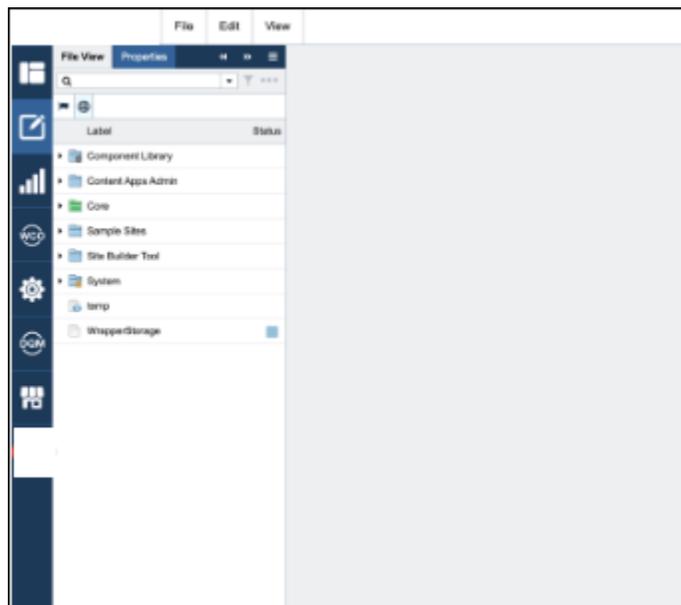
*WebMD Ignite recommends avoiding the collection or storage of sensitive or confidential information when adding custom fields to the event registration form.*

*Sensitive and confidential information includes, but is not limited to. Protected Health Information (PHI) or patient data, social security numbers, or credit card numbers.*

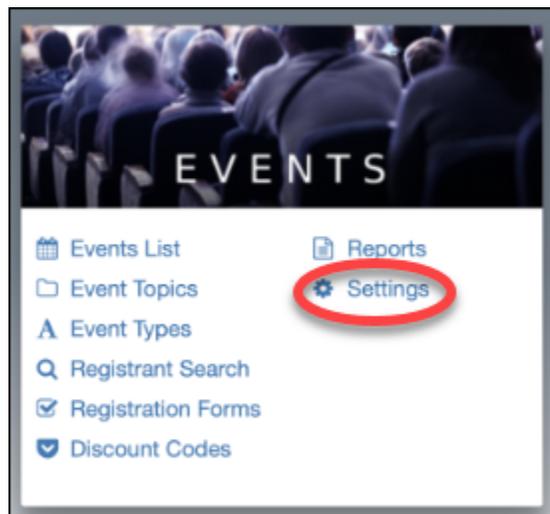
## Manage Event App Settings

If you need to edit an event, navigate to the Events Content App.

To access Content App components from anywhere within CMS, click the Content Apps icon from the CMS left menu.



To edit event app settings, you will want to access the **settings**.



Now you'll see several options within the settings screen, including search settings, detail settings, SEO settings, Cart settings, Cancellation settings, and Roster Report settings.

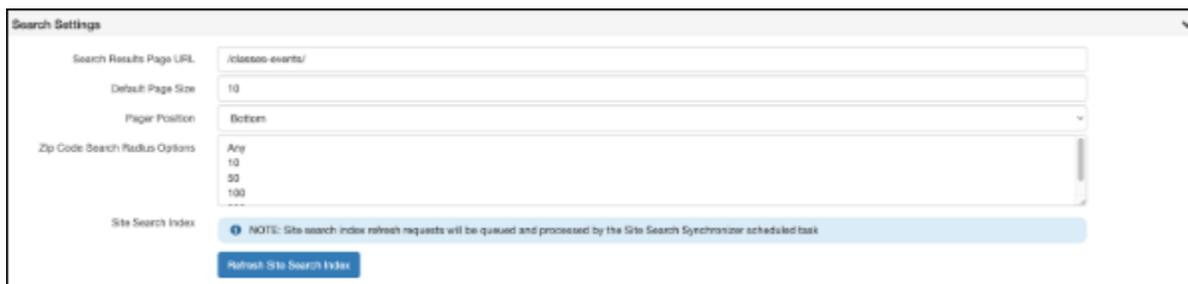


The screenshot shows the 'Search Settings' page. At the top, there is a dropdown menu for 'Global Defaults'. Below it, the 'Search Settings' section is expanded, showing fields for 'Search Results Page URL' (set to '/classes-events/'), 'Default Page Size' (10), 'Pager Position' (Bottom), and 'Zip Code Search Radius Options' (Any, 10, 50, 100). A 'Site Search Index' section contains a note and a 'Refresh Site Search Index' button. At the bottom, there are expandable sections for 'Detail Settings', 'SEO Settings', 'Cart Settings', 'Cancellation Settings', and 'Roster Request Settings'.

Most of these you should never have to adjust. **Note that if you adjust some of these settings, it would be best to have a WebMD Ignite developer to walk you through it.**

## Search Settings

Search settings lets you adjust how your events populate on your search results page.



This is a close-up of the 'Search Settings' page, showing the same fields as the previous screenshot: 'Search Results Page URL' (set to '/classes-events/'), 'Default Page Size' (10), 'Pager Position' (Bottom), and 'Zip Code Search Radius Options' (Any, 10, 50, 100). The 'Site Search Index' section is also visible with the note and the 'Refresh Site Search Index' button.

- **Search Results Page URL:** Please do not touch this without discussing it with a WebMD Ignite developer first.

- **Default Page Size:** Adjust the number of events that present on the results page by changing this number.
- **Pager Position:** Choose where the pagination for your events sits - Top, Bottom, or both Top and Bottom.
- **Zip Code Search Results Options:** Adjust the radii options for your search filtering.
- **Site Search Index:** If you aren't seeing an event in your search results but have verified that the event is enabled, published, and has an active occurrence, then come here and click on the "Refresh Site Search Index" button. Sometimes things will get caught up in G2 search caching; clicking this button helps refresh the site search.

## Detail Settings

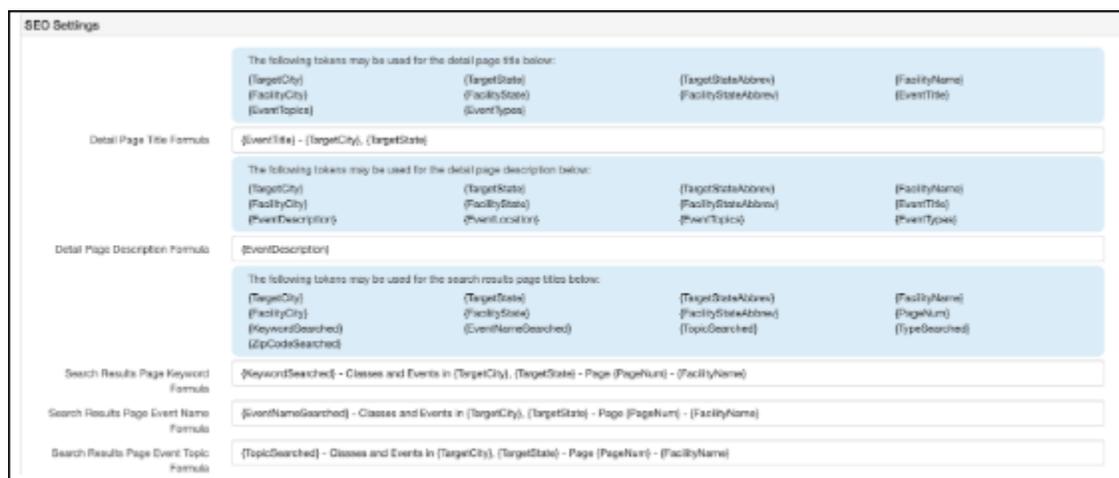
The Details settings adjust the details pages for your events.



- **Detail Page URL:** Please do not make any changes to this field without discussing it with your WebMD Ignite representative first.
- **Direct URL Path:** Please do not make any changes to this field without discussing it with your WebMD Ignite representative first.
- **Direct URL Formula:** If you'd like to adjust the end part of your location's relative path to include different information, you can use this Direct URL Formula to make edits using the available tokens. You can also insert your own language between tokens. Note that this formula, unless overridden at the specific event instance, will hold true for ALL events on your site.
- **Default Event Image URL:** If you're using a default image that is different from the one that was originally set up for your site, enter the relative path here.

## SEO Settings

The SEO settings change the SEO for your events.



Use the available tokens, your own language, or a combination of the two to develop a standard SEO formula for all of your events. You can set specific formulas for Title, Description, and more.

## Cart Settings

The Cart settings adjust the cart page for your events.



Choose the timeframe for when an event is considered abandoned and is canceled. The default time is 15 minutes. Here you can also disable the cart or add multiple confirmation emails.

## Cancellation Settings

The Cart settings adjust the cart page for your events.



Enter the URL for your cancellation page in the Cancellation Page URL field. Enter an internal contact's email (option) into the Refund Failure Contacts field. If you want to allow event registrants the option to cancel their registrations on their own, make sure that Enable Self-Cancellation is clicked.

## Roster Request Settings

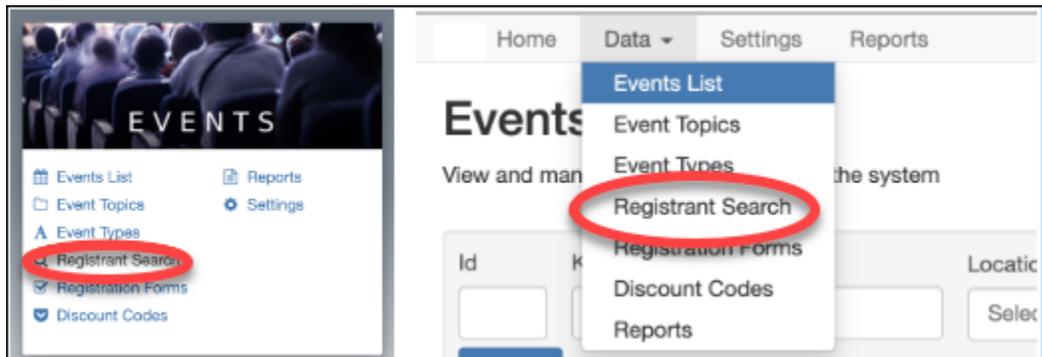
Roster request settings lets you enter the email addresses for those internal individuals who are authorized to receive event registration roster lists from the system.



## Registrant Search

The Registrant Search option allows you to search and view event registrant information. This page contains a filter to assist with locating event registrants and events by name, with options to Apply (run the filter based on your selections), or to Clear Filter.

To access this page, choose the Registrant Search link from the main Content App Events menu, or from the Events Data tab drop-down menu option.



Once on the registrant search page, you'll be presented with a whole host of filtering options to help you refine your search:



- **ID:** Filter the event registry to locate a registrant by ID. This is the system-generated transaction ID that was created when the registrant paid for the event occurrence. Use this filter to quickly match event registrants to payment transactions in either Payflow Pro or Authorize.net. This is useful to reconcile payment transactions, or for cancellations, when you need to issue a refund.
- **Registrant Name:** Begin typing the name of an event registrant to populate an alphabetized listing for this filter.
- **Registrant Email:** Begin typing the email address of an event registrant to populate an alphabetized listing for this filter.
- **Event:** To quickly locate registrants for a specific event, first make a selection from these drop-down options, then use the Event Occurrence filter. The type-ahead feature is available for this field.
- **Event Occurrence:** This field is dependent on the Event field selection above. Once an event is selected, choose an event occurrence from the list in the format (ID - Date Time).
- **Registrant Status:** Options are Active or Removed. Use the Registrant Status filter to retrieve and view information on registrants that were previously removed from an event.

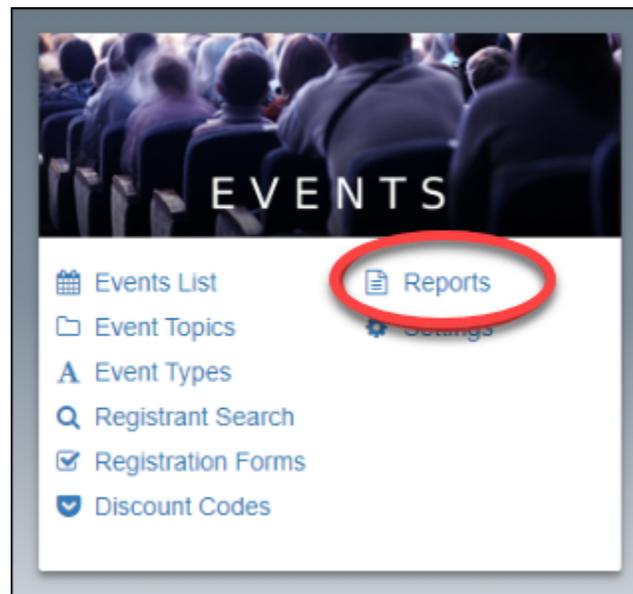
Once you've filtered for and found your registrant, click on their name to **edit their information, resend confirmation emails, or remove them from the event occurrence**. Remove is in the lower right hand corner once in the registrant information screen. You can also resend confirmation emails from this screen.

## Event Reports

The event reporting tool can be used to report on nearly every aspect of events including events, occurrences and registrants.

Reports can be shared across all event admins or marked as private and only available to the user that created the report.

To get started, select **Reports** from the Events card in the content apps admin.



This will bring up a list of any existing reports accessible to you (either those created by you or others marked public or your reports marked private.)

### Create New Report

To create a new report, select “Create New” in the bottom right corner of the screen.

A wizard style guide will step you through the four part process in creating a report.

**Note:** It’s a good idea to save the report periodically as you go so any changes are not lost due to connectivity or timeout issues.

### Details

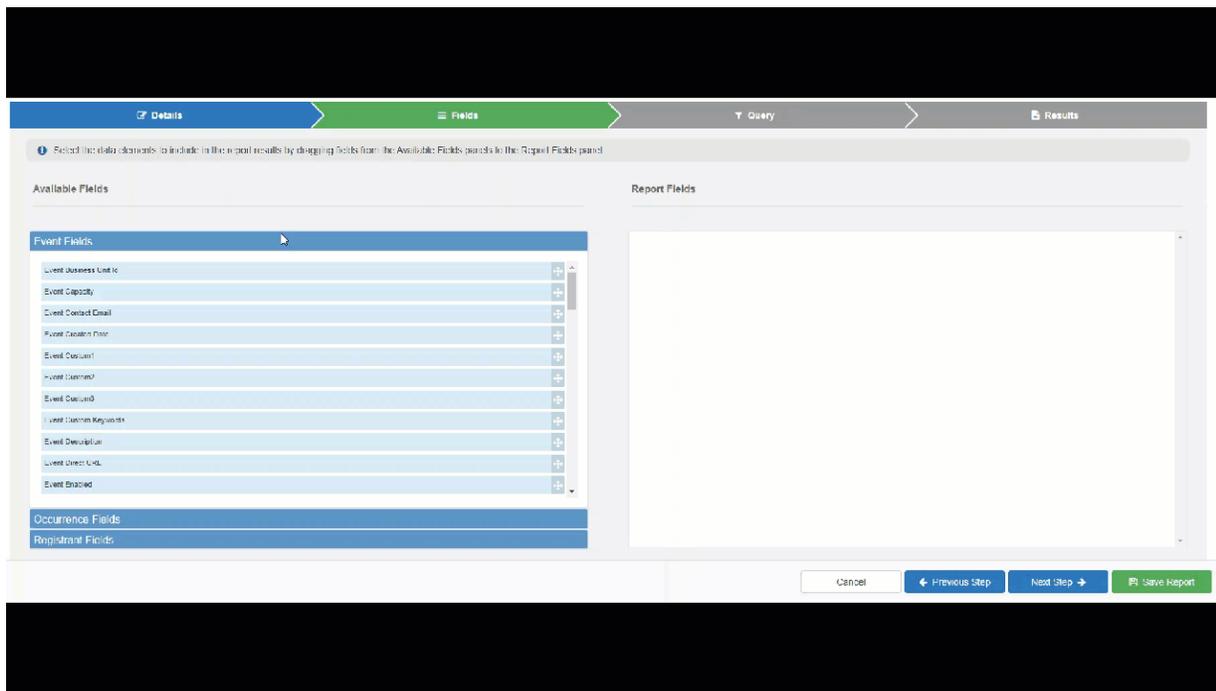
Enter a name (required) and description (optional) in the fields. If you want to limit access to the report to only you, tick the box marked **Private**. This is a good idea if you expect to make multiple reports that are only to be used by you as it will keep the reports interface free of clutter for other users.

Click **Save Report** and then **Next Step**.

### Fields

The next step involves selecting and organizing the fields you wish to include on your report. The fields are organized into three sections: Event Fields, Occurrence Fields and Registrant Fields and contain nearly every attribute in COD10 events that can hold data. To include a field on your report, drag it from the pane on the left to the pane on the right. The order will determine column order in the resulting report. To remove a column, simply drag it from the pane on the right back to the pane on the left.

Once you have selected the fields, click **Save Report** and then click **Next Step**.



## Query

The next step is to define the query on which you want to search. Similar to the fields tab, you can query against almost any field that stores data in the COD10 events application.

There are two modes: **Simple** and **Advanced**.

**Simple** allows you to build a cluster of AND statements that will be evaluated against the fields queried to return results. You can add additional groups which will be evaluated as OR statements. Statements within these groups will be evaluated as AND statements as well.

Select the field you want to query against by using the dropdown and then the operator (e.g. equals, contains, does not contain, greater than etc. These operators will change depending on the field selected\data type contained within the field.)

The scope of the query is completely configurable. There is no right or wrong way to build a query. Note that a broad query may return a large number of results while a highly specific query could return no results at all.



The **Advanced** query builder allows for building nested queries using a mix of AND or OR operators.

Once you have built your query, click **Save Report** and then **Next Step**.

## Results

Now that you have added your fields and built your query, it's time to run the report and see your results set. Click "Run Report" to see the items that match your query and the fields you included in your report.

Once you have run the report, you can click the green "Download" button to generate a CSV of your result set.

If you receive a message that says "No results found" you may need to adjust your query to be less specific.

[This video](#) goes into more detail about how to effectively use reporting.

## Email Templates

Email Templates save time and support accuracy in communications with your event registrants. You can configure different email templates for use across different types of classes with consistent messaging and branding. E.g. A virtual\online class that contains instructions on how to download Zoom etc. vs an in-person class that contains a Google Maps link with directions to the class.

There are four emails that may be sent to registrants of a class which can be customized and templated:

- Event Registration Confirmation
- Events Admin Cancel Attendee (If the registrant is canceled)
- Event Registration Reminder (If reminders are enabled on the event)
- Event Roster Notification (Ad hoc email sent manually to current registrants containing updates to an event)

Additionally, there are several administrative emails sent by the Events module that can be customized, but not templated. i.e. You can't choose a different template on a per event basis.

These include:

- Event Registration Contact Notification
- Event Roster Request
- Event Roster Summary

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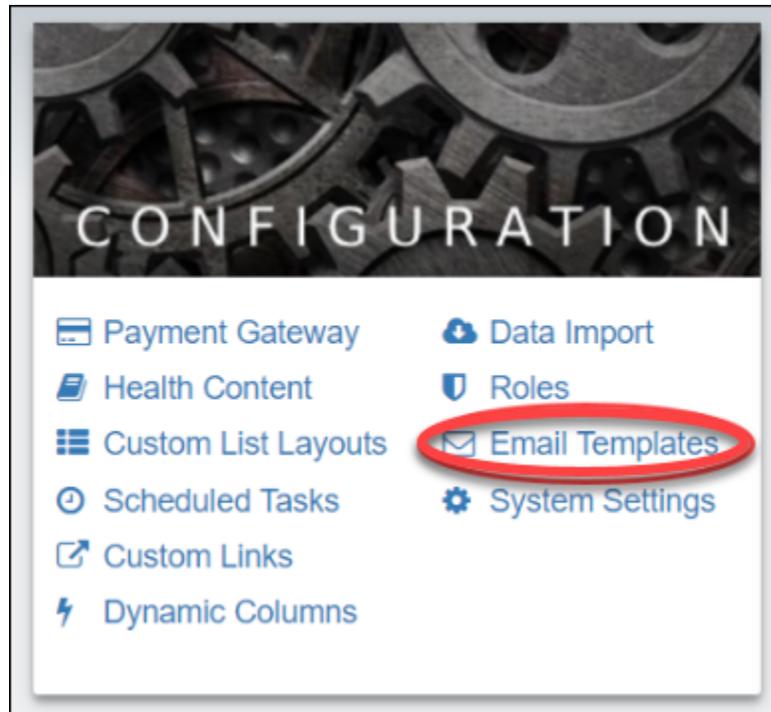
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- Event Waitlist Confirmation
- Event Waitlist Registration
- Events Admin Cancel Contact
- Events Admin Refund Failures

COD10 has default email templates already set up for each of these communications. You may edit the default templates or create new ones and assign them to classes as needed.

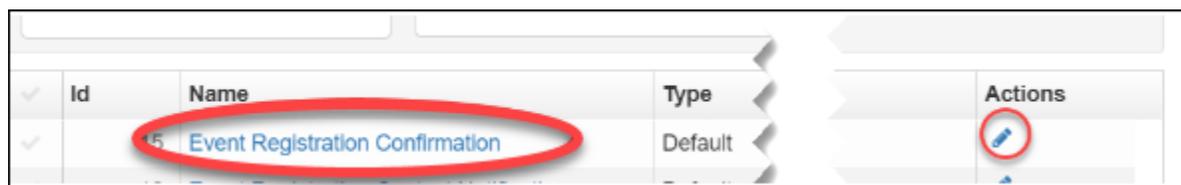
### Editing the default email templates

In content apps in the **Configuration** pane, click on **Templates**.



A list of all existing email templates will display. The default templates will have **Default** listed in the type column. Any custom email templates will have the type of email (e.g., Event Confirmation) listed in the Type column.

To edit an existing template, click on the name or edit icon corresponding to the email you wish to edit.



Each of these email templates have the same form fields, as described below:

- **From Address** (Enter a properly-formatted **From** email address (email@domain.com) in this free-text field.) **Note:** In order to use a non-Webmd email address you must follow the

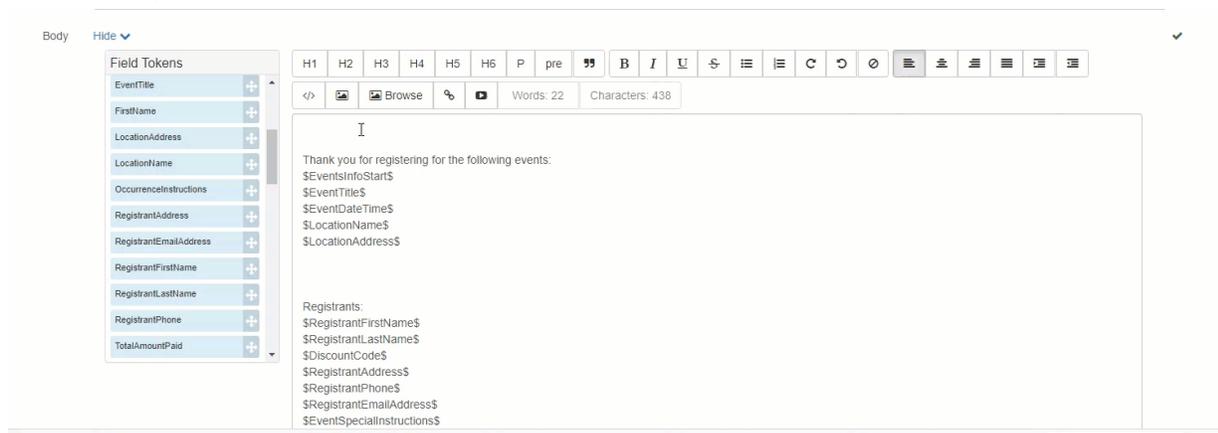
instructions in the SPF & Whitelisting Updates section of this document to allow emails to be sent from your organization's domain.

- **Subject** (Enter the subject of your email in this free-text field.)
- **Body** (The fields in this section comprise the body of your email. Use the formatting tools in the included **WYSIWYG** editor to style the text elements of your email. Drag applicable tokens onto the body text where needed to personalize your message with existing data about the recipient and event.)
- Hide (Expand/contract this control to **Show/Hide** the **Body** section of this email template.)

The body text allows you to compose the contents of your email and dynamically insert values related to the event and registrant using the tokens from field tokens pane to the left of the body.

Arrange the text of your email and any related tokens as needed and press save.

**Note:** The `$EventsInfoStart$` and `$EventsInfoEnd$` tokens must wrap any event-related tokens e.g. Event Title, Special Instructions, Location etc.



### Creating a new template

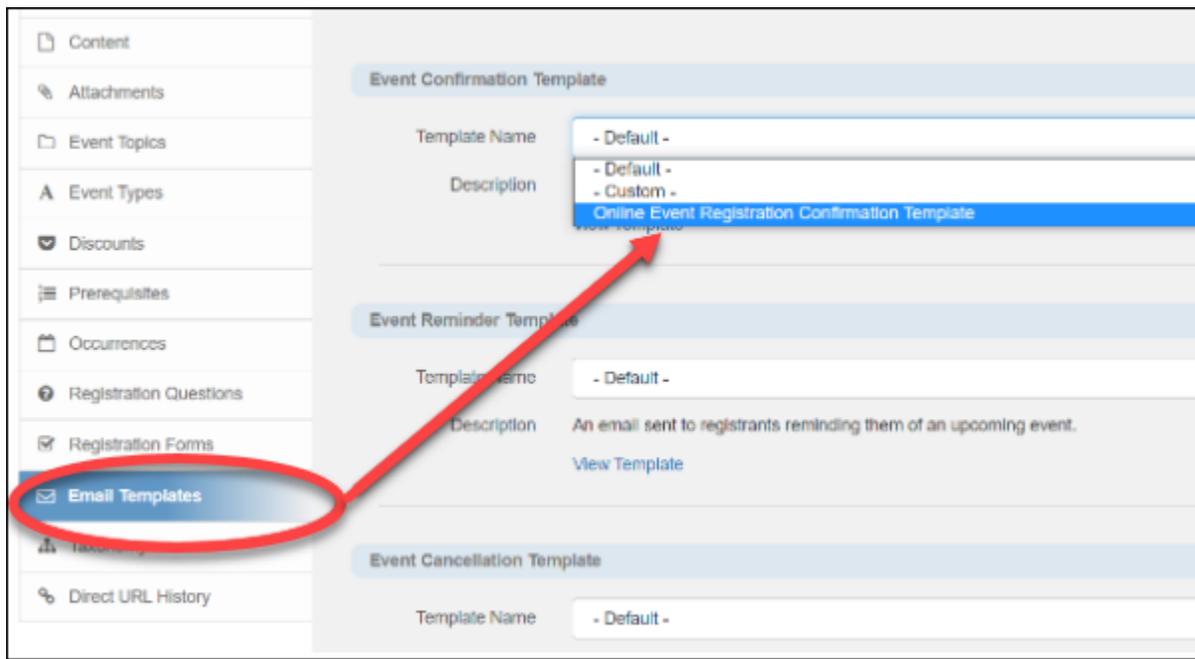
From the list of existing templates, select **Create New** then select from one of the four template types in the dropdown menu.

Template name, From Address and Subject are required. You may optionally add a description of the template.

Depending on the template type selected, the body of the email will be pre-populated with the default text and tokens. Edit the template as needed and press save.

### Using custom templates on Events

To assign a custom template to an event, select **Emails Templates** from the left column of tabs in the event record. You can then select your custom templates from the dropdown of each email type.



**Note:** You can also create a one-off custom email template from within each event record by selecting “Custom” from the dropdown menu. The process is the same as creating a new template, however the template will not be saved and available for use by other events.

### SPF & Whitelisting Updates

If you’re wanting your event registration emails to come from an email address that you manage (i.e., [classes@yourorganization.org](mailto:classes@yourorganization.org)), you will need to create SPF records with your IT team and ensure that your events are set up to send from your internal email address.

For your website that is hosted by WebMD Ignite on the Crownpeak platform, you will need to do the following:

- Create an SPF record to send from the following two IP addresses:  
149.72.63.232
- Whitelist medseek.com within your email server so emails that don’t originate from your domain are not rejected

You can check your SPF records [here](#).

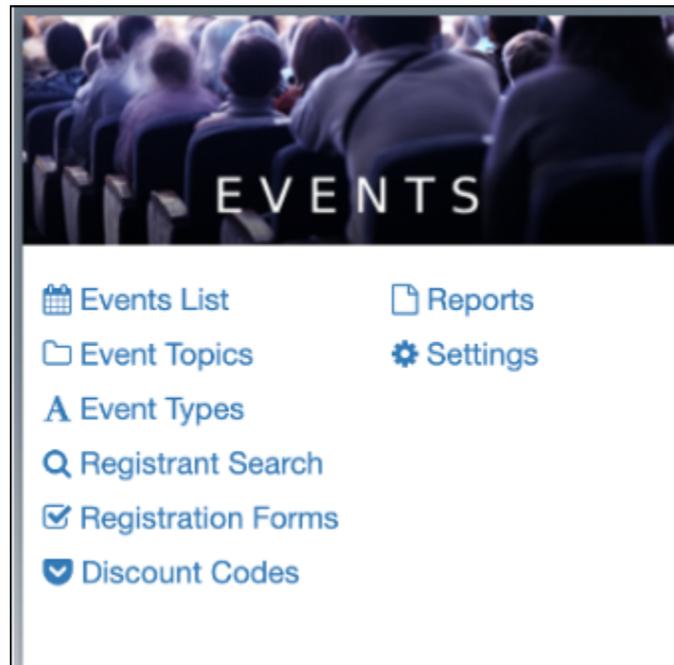
You will also need to check to make sure that your events are set up to use the correct sender email address from within the content apps.

If registrants are receiving emails, but they’re coming from the wrong FROM address, that signifies an email template configuration issue. Log into the Crownpeak platform and access your Events content apps to fix this.

Click **Events List** to search for the event that’s sent incorrectly. Enter the event name into the keyword box.

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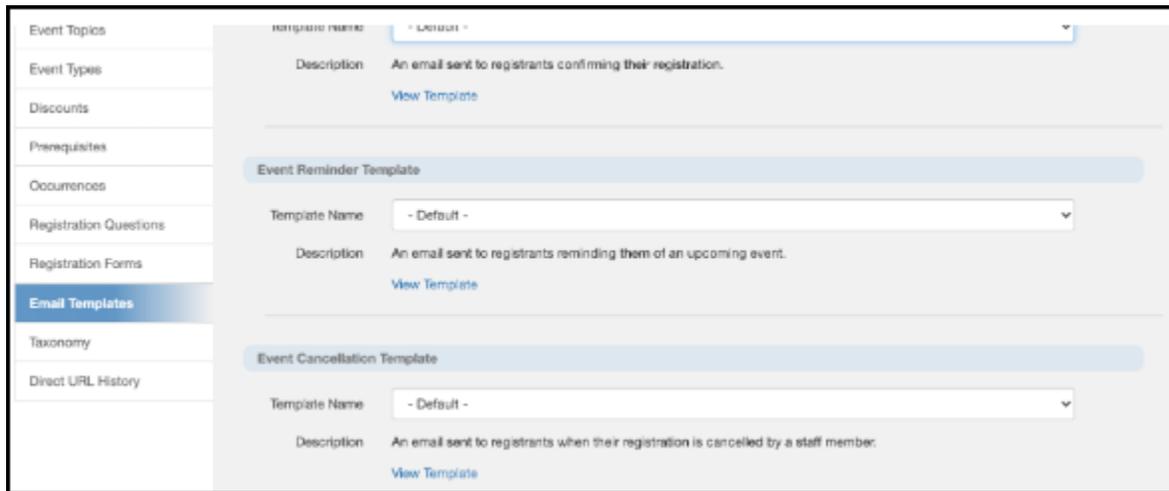
Click on your event to edit it.

**Events**  
View and manage all Events defined in the system

Status:

Id	Title	Summary Description	Location	Created Date	Publish Date	Enabled	Actions
1	Adaptive Golf Clinic	Civilians, veterans and a...	Legends on Paris Island ...	12/21/2017	1/8/2018	true	
4	Baby University, Prepare...	As you get set for baby's ...	Beaufort Memorial Medic...	12/22/2017	12/21/2017	true	
5	Baby University, Baby Ba...	Becoming a parent is a lif...	Your Web Enabled Device	12/28/2017	12/28/2017	true	
7	Cancer Support, Paula W...	Coffee and Confidants - ...	Port Royal Medical Pavil...	1/10/2018	11/19/2019	false	
8	Cancer Support, Paula W...	Lunch and Learn - A free...	Port Royal Medical Pavil...	1/10/2018	11/19/2019	false	
9	Cancer Support, Paula W...	Evening Enlightenment - ...	Port Royal Medical Pavil...	1/10/2018	1/8/2018	false	
10	Cancer Support Group	A free program for patien...	Port Royal Medical Pavil...	1/10/2018	1/8/2018	false	

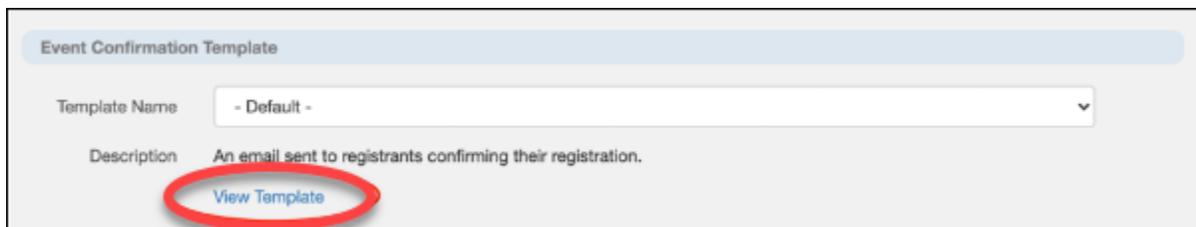
Looks for **Email Templates** in the left-hand navigation of your event:



You should see three event templates you can edit:

- Event Confirmation Email
- Event Reminder Email
- Event Cancellation Email

Click **View Template** to edit.



Once inside the event template, you'll see one of two layouts:



OR

Id	15
Name	Event Registration Confirmation
Description	An email sent to registrants confirming their registration.
From Address	marketing_team_nkch1958@nkch.org ✓
Subject	Event Registration Confirmation ✓
Body	Hide ▾

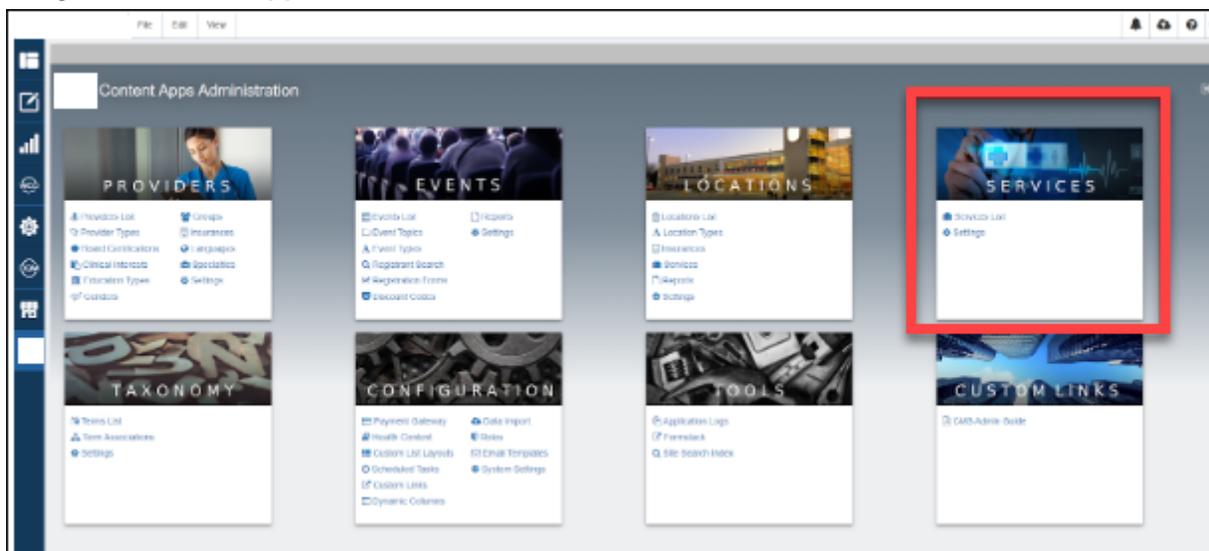
## Services

**Note:** Before adding or editing Services, check with your WebMD Ignite representative. This functionality is not used by all site instances.

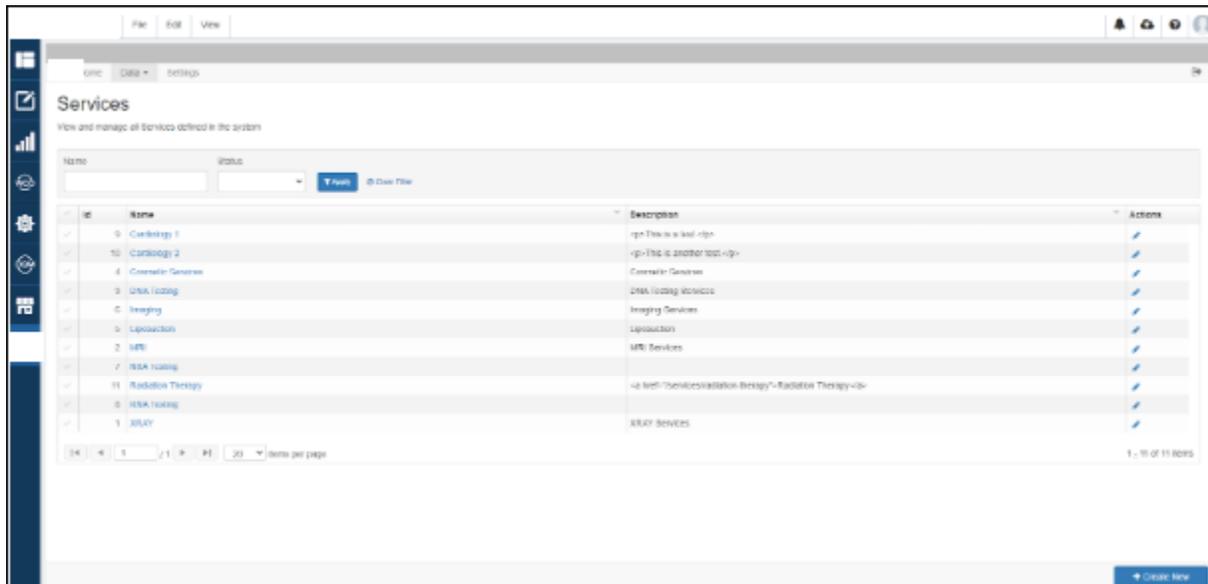
This section allows you to set up a dynamic services search, similar to Providers, Events and Locations where there is a Services search page, results page and details page.

Setting up services this way is optional and most clients do not use this feature. However, when it is used, it allows Services data to be available in the form of a 'token' which can be used in the 'Services' section of a location and pulled in dynamically where needed, rather than entered manually. The most popular use case for this is creating a Service record that acts as a pointer link to the actual service line page (which is typically a more robust page) and attaching that pointer to a Locations record. We will demonstrate this below.

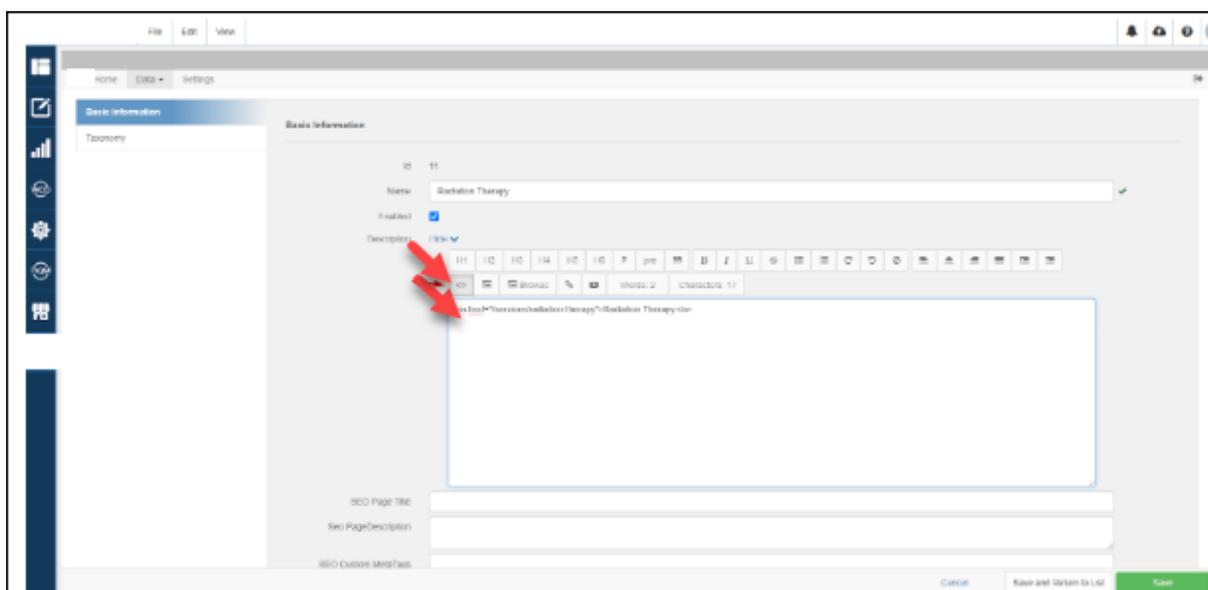
Navigate to **Content Apps > Services**



Click **Services List**.



Click **Add New** button.

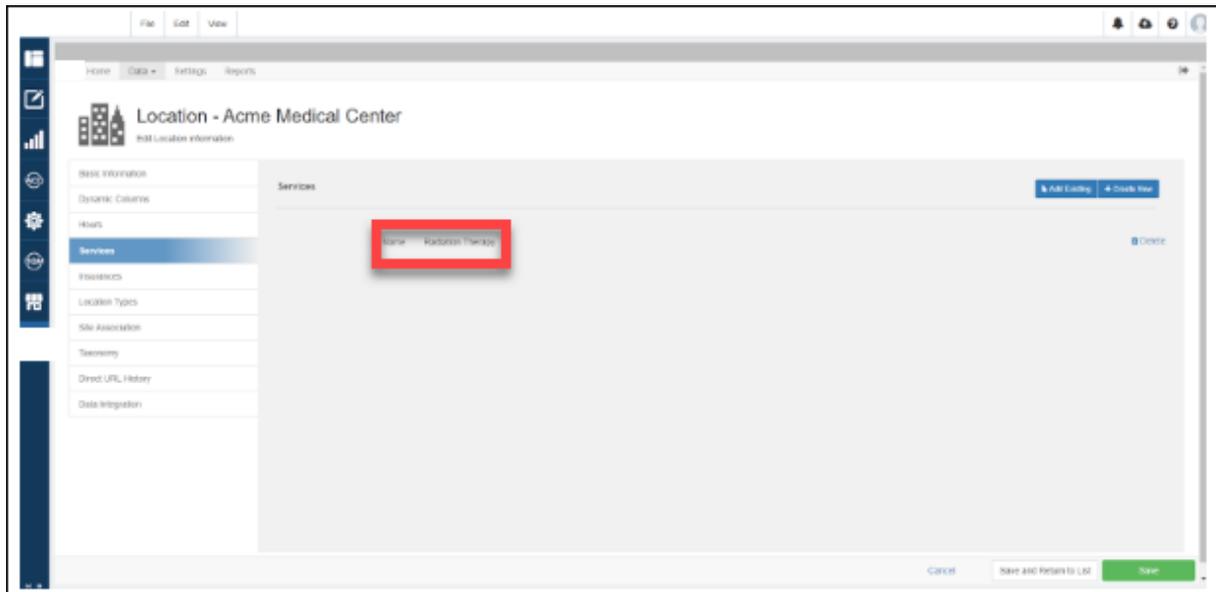


In this example above, the Services detail page would use the Name listed above as the HT. And its contents would be the link showing in the description.

The SEO fields allow you to customize the SEO settings for this services page.

In effect, used in the way described above (and how this is typically used) is to provide a link to actual service line pages. Now this record is available as a token.

Now you can go into the Locations details widget and drag this token over into the Services tab by clicking the **Add Existing** button. (search for 'Radiation Therapy', select and press 'Add'.)



Now that 'Radiation Therapy' service term is associated with the Acme Medical Center, the radiation link (and any other service related data entered as part of that services record, is now pulled into this Acme location record.

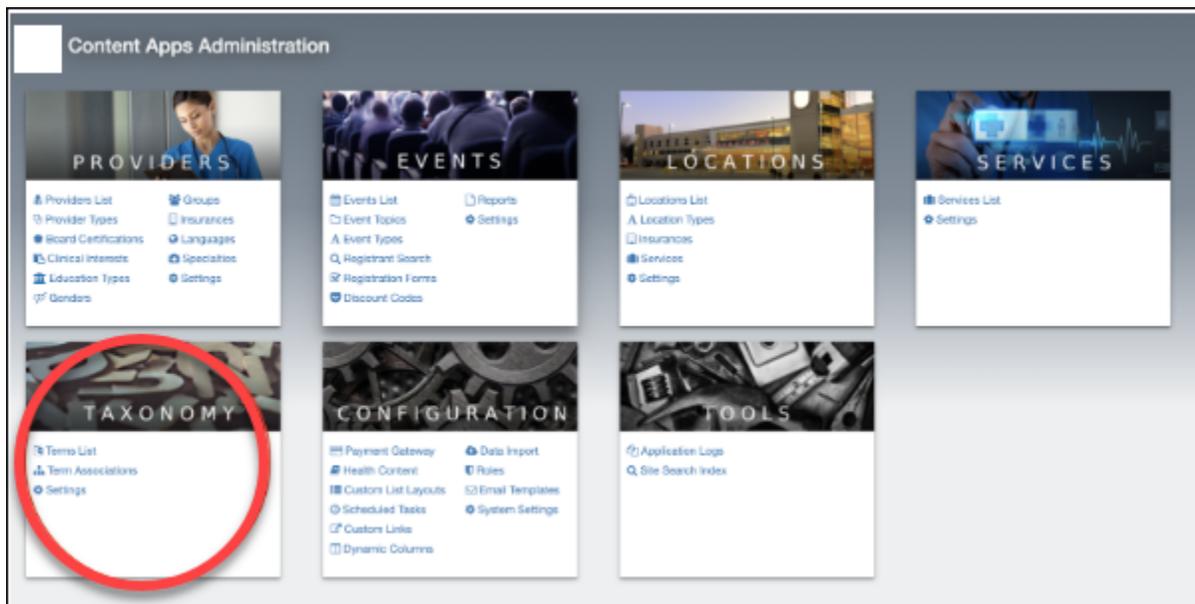
## Taxonomy

Taxonomy is a very powerful way to help create a more robust search functionality for your users. However, keep in mind that if not approached carefully, taxonomy can also potentially cripple your site search effectiveness. Remember that sometimes less is more.

When you develop your taxonomy keyword list, you must think about the end user and how they search. You can also use third-party tools to help you: Google Analytics will tell you what users are searching for on your site today, keyword planning tools, Google Trends, etc.

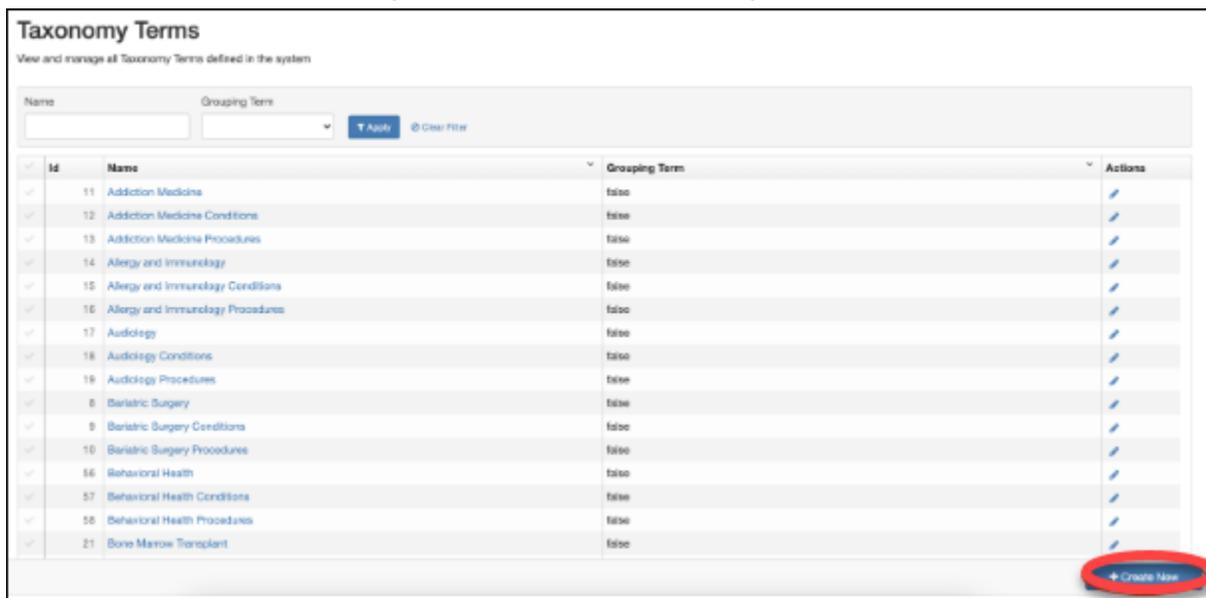
WebMD Ignite has a taxonomy approach that we can help you implement if you'd like. Ask your team for more information.

The taxonomy functionality can be found under your content apps.



The simplest way to develop your terms and terms associations is to think of them very broadly. The easiest way is to create three buckets for each of your service lines: a general bucket, a conditions bucket, and a procedures bucket.

To create these buckets, click on your **Terms List** in the Taxonomy box and Create New.



A modal will pop up where you can enter one taxonomy bucket or multiple buckets. If you are entering multiple buckets, be sure to put only one on each line. You cannot use commas to separate, you have to use a hard return.

Once your bucket(s) is(are) created, you can add synonyms. Click the pencil icon to edit.



Synonyms should be separated by a comma with no spaces between them. Spaces indicate to the system long-tail keywords. Examples:

**Term - Bariatric Surgery**  
 Edit Term Information

Id: 8

Name:

Synonyms:

Grouping Term:

**Term - Bariatric Surgery Conditions**  
 Edit Term Information

Id: 9

Name:

Synonyms:

Grouping Term:

**Term - Bariatric Surgery Procedures**  
 Edit Term Information

Id: 10

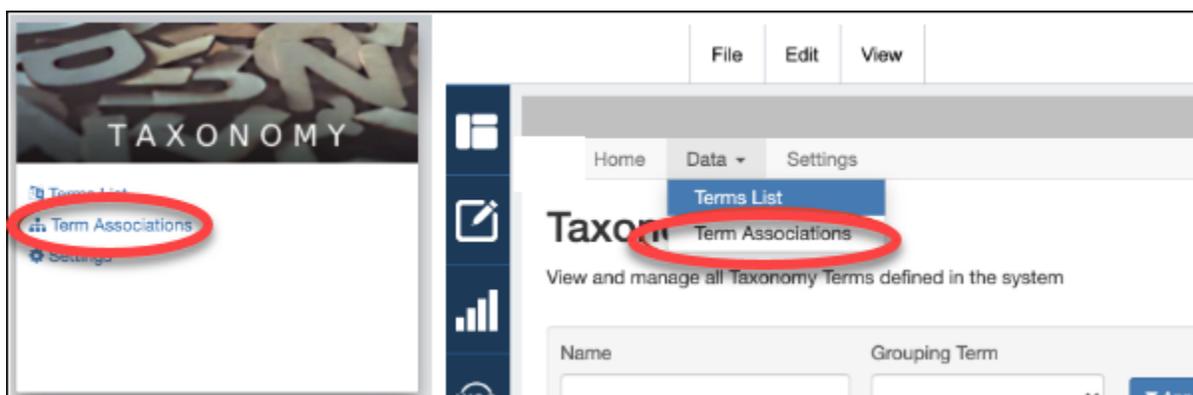
Name:

Synonyms:

Grouping Term:

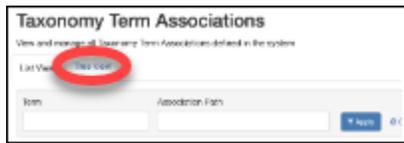
You do not need to click **Grouping Term**.

Once all of your synonyms are entered, you need to pull them into the taxonomy architecture. Navigate to Terms Association either through the content apps card or through the dropdown menu at the top of the taxonomy content app:

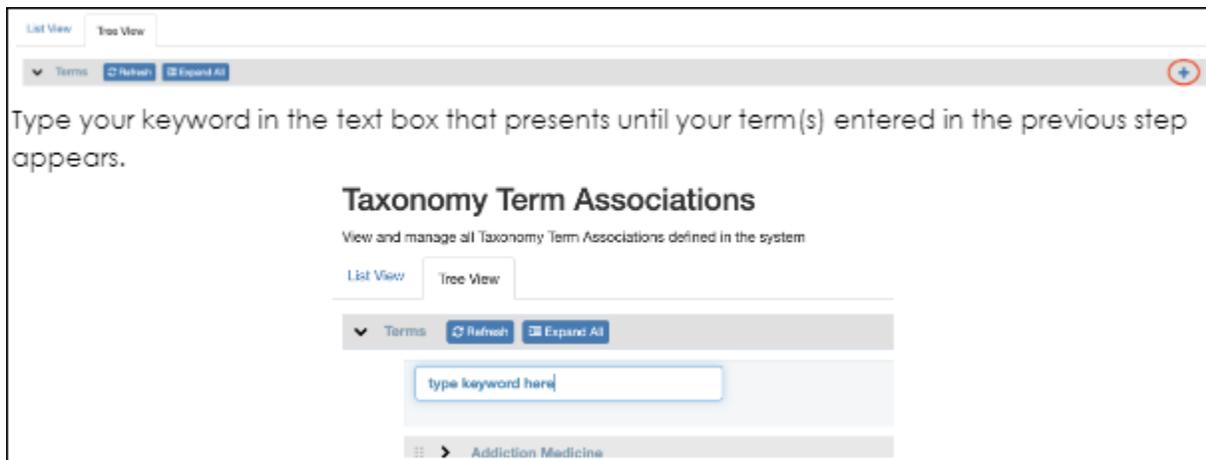


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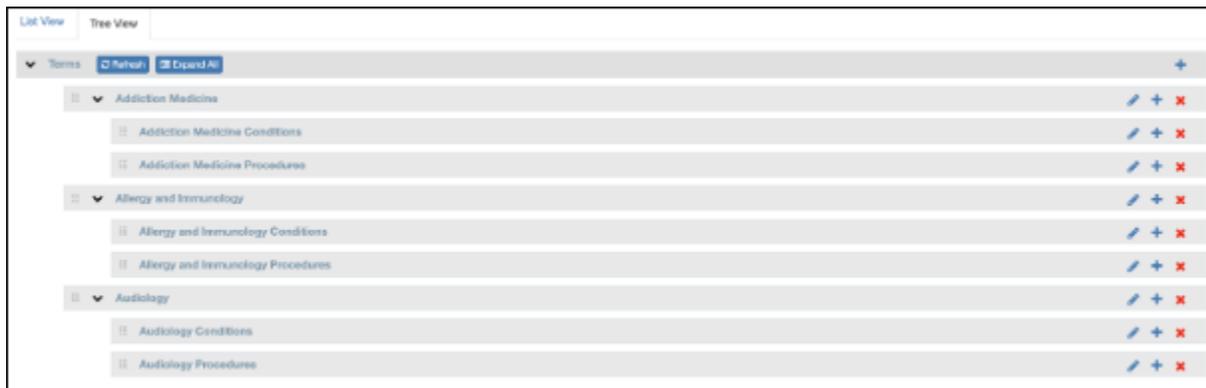
Tree View is easier to use, so toggle to Tree View:



On the Terms bar at the top, click the plus sign all the way to the right to add a new term:



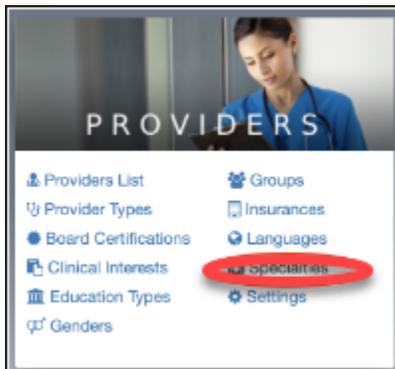
Once all of your terms have been pulled into the tree view, you can drag and drop them so they nestle appropriately. The best approach is to take your three buckets for each service line, having the general be the service line bucket and nestling the other two (Conditions) and (Procedures) as children of that term. You should end up with something like the following:



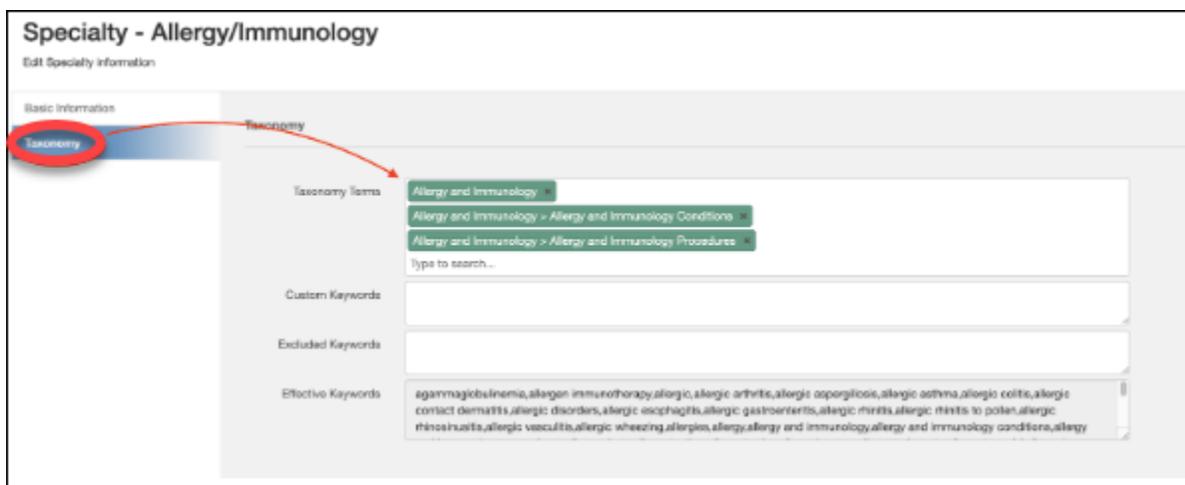
### Assign taxonomy term to providers/locations/events/services

Now that you've entered all your keyword buckets and synonyms and associated them in the tree view, it's time to start adding them to areas throughout the site.

Let's start with **Providers**. Navigate to your Providers content app and click on Specialties:

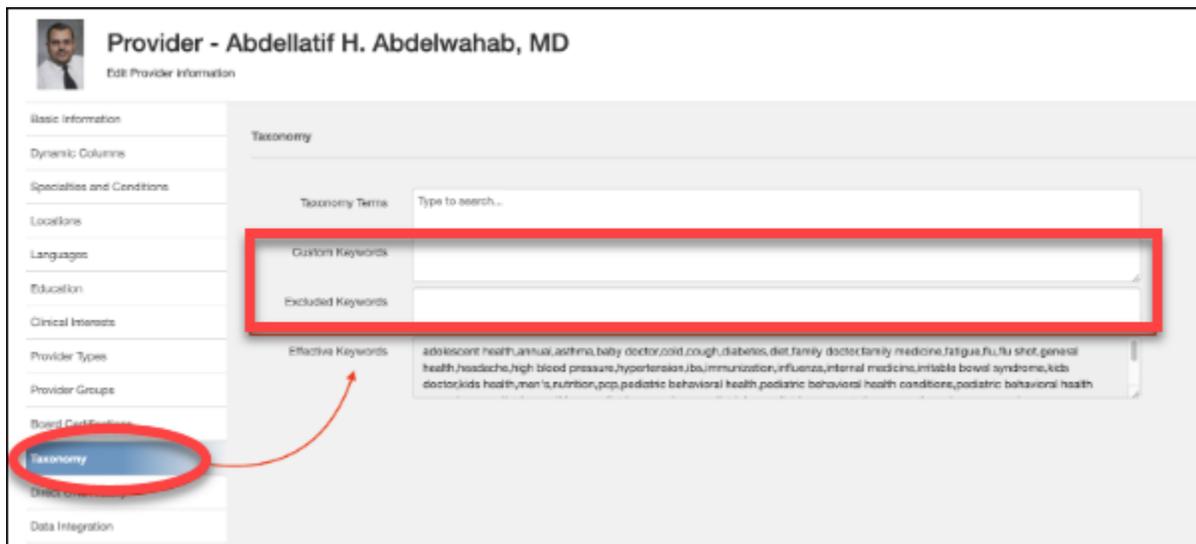


Following these steps will append all of your synonyms to every single provider on your site who has that specialty. Choose your specialty from the list and click through to the taxonomy tab. In the field next to **Taxonomy Terms** start typing in the name of the taxonomy bucket you want to append to that specialty. When you're done, click **Save**. Repeat this process for all specialties.

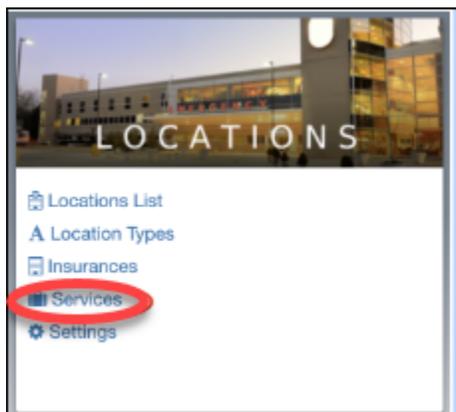


**Note:** You may have some physicians who want additional or fewer terms applied to their profiles. This is easily manipulated in that specific provider's profile. Navigate to the provider content app and search for your specific provider.

You should see a list of **Effective Keywords** if you have completed the previous steps. You will also see additional fields for **Custom Keywords** and **Excluded Keywords**. Custom keywords is where you will add any keywords not already on the list of effective keywords. Excluded keywords is where you will add keywords for which the provider does not want to present in query results.



The approach for **Locations** is exactly the same, however, you will access Services from the Locations menu:



Adding taxonomy to events must be done at the individual event level. In the Event edit screen you will see a taxonomy tab where you can pull in your existing buckets or add custom keywords. Note: this can only be done at the main event level. Each occurrence inherits the taxonomy from the main event listing.



You can also add taxonomy at the individual page level. If you view your page in Preview and hover over the bottom of the page, you'll see a meta configuration box pop up.



You'll see an option for Taxonomy where you can begin typing the appropriate bucket(s) you want to append to your page.

**Taxonomy**

Taxonomy Terms

Inherit Folder Tags

---

**Taxonomy**

Taxonomy Terms

Inherit Folder Tags

**Allergy and Immunology**

**Allergy and Immunology > Allergy and Immunology Conditions**

**Allergy and Immunology > Allergy and Immunology Procedures**

Save and deploy to live when you're finished.

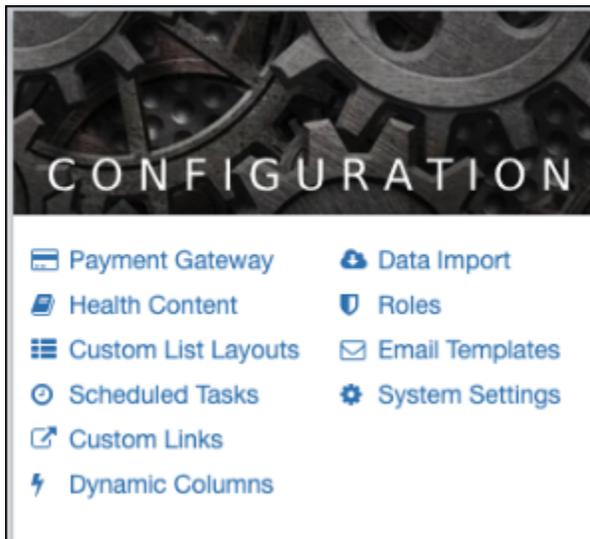
**Of important note** is that you may need to adjust your search widgets to search using “starts with” instead of “contains” to ensure a better user result. For instance, if you're using “contains” and someone queries “urgent care”, the site will look for all pages using both “urgent” and “care” vs. if you have “starts with” as your query, it will look for “urgent care”.

## Content Apps configuration

### Introduction

The Configuration section within the content apps allows administrators to interact with the CMS to configure and manage various functions that support the user experience. Activities available within the Configuration section include:

- Payment Gateway
- Health Content
- Custom List Layouts
- Scheduled Tasks
- Custom Links
- Dynamic Columns
- Data Import
- Roles
- Email Templates
- System Settings



### Payment Gateway

The Payment Gateway allows administrators to configure and manage online payment vendors for use with Event Registration and online payment. There are three supported payment vendors within the CMS - Authorize.Net, PayPal PayFlow Pro and Tempus.

On successful payment, a confirmation page is displayed to the Event Registrant along with an email confirmation.

**Of important note** - an account with the online payment vendor must be created prior to creating this configuration.

Selecting **Create New** will present the (3) available payment processors.

**Select Payment Gateway Type to Create**







The available fields will differ depending on the specific payment processor. These fields will be provided by the merchant account upon initial setup with that vendor.

Example:

**Authorize.Net** **New Authorize.Net Configuration**  
Create a new Authorize.Net Configuration in the system

Configuration Name

Environment

Live API Login ID

Live Transaction Key

Test Live Settings

Test API Login ID

Test Transaction Key

Payment Method

Once completed, select the **Save** or **Save and Return to List** button.

To **Edit** a record, select the **pencil icon**  to the right of the desired entry.

In order to associate a payment processor with an online registration form, please review the Events Management Content Apps Registration form set up.

### Custom List Layout

A custom list layout is used to create and curate a specific set of content to be displayed on a page. This configuration option allows the administrator to control the layout of this area.

Selecting **New** will display the following screen:

- **Id** - a dynamically assigned numeral value
- **Name** - name of custom list
- **Content Type** - dropdown of all available content types, both data driven and content
- **Header Layout** - WYSIWYG field to style the content of the header section
- **Item Layout** - WYSIWYG and token field field to configure and style the content of the actual list
- **Item Separator Layout** - WYSIWYG field to style the content
- **Footer Layout** - WYSIWYG field to style the content of the footer

Once completed, select the **Save** or **Save and Return to List** button.

To **Edit** a record, select the **pencil icon**  to the right of the desired entry

## Scheduled Tasks

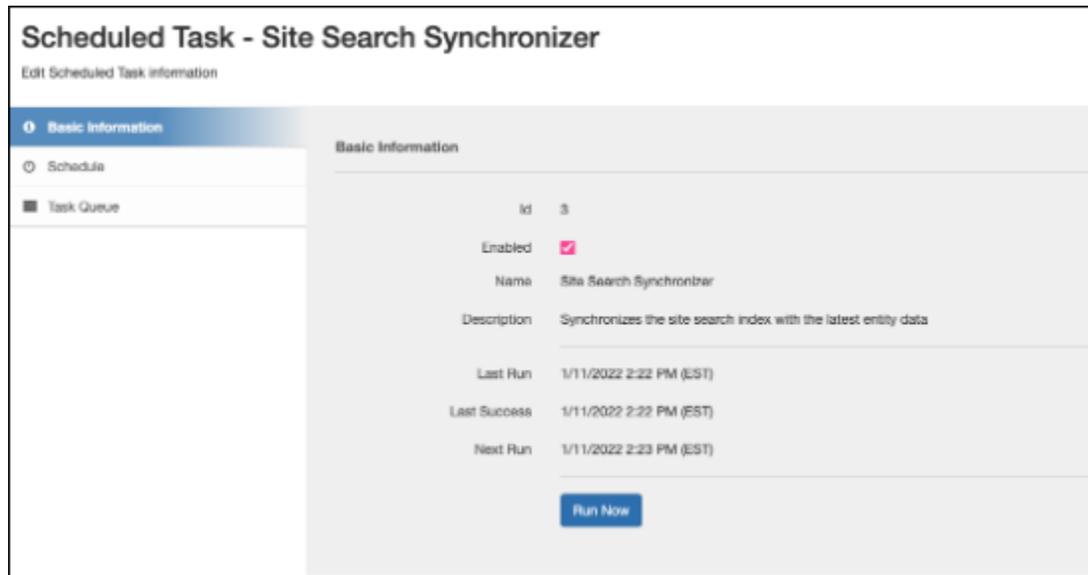
The Scheduled Tasks area of the Configuration is a real-time dashboard of all ongoing activities the CMS relies upon to stay continually updated. An administrator can both view and manage scheduled tasks within the system.

Name	Schedule	Next Run	Status	Task Count	Last Run (EST)	Actions
Audit Event Logger	Continuous	37 mins 41 secs	Last run succeeded. Waiting...	0 pending	1/11/2022 2:17 PM	
Data Import	Continuous	-	-	0 pending	-	
Document Scheduler	Continuous	-	-	0 pending	-	
Email Message Sender	Continuous	Running...	Starting...	0 pending	1/11/2022 2:18 PM	
Engagement Center Export	Continuous	-	Last run errored (see logs). Waiting...	0 pending	6/25/2020 7:13 PM	
Events Cart Cleanup	Continuous	0 mins 15 secs	Last run succeeded. Waiting...	-	1/11/2022 2:12 PM	
Events Lifetime Management	Continuous	10 mins 19 secs	Last run succeeded. Waiting...	-	1/11/2022 2:14 PM	
Events Registration Returns	Continuous	-	-	0 pending	-	
Events Reminders	Continuous	0 mins 53 secs	Last run succeeded. Waiting...	-	1/11/2022 2:14 PM	
Events Referral Management	Continuous	1 mins 25 secs	Last run succeeded. Waiting...	-	1/11/2022 2:15 PM	
Health Content Synchronizer	Continuous	-	-	-	-	
Listings Data Export	Daily	-	-	-	-	
Site Search Synchronizer	Continuous	06 secs	Last run succeeded. Waiting...	0 pending	1/11/2022 2:18 PM	

- **Name** - name of the schedule task
- **Schedule** - when the scheduled task is scheduled to run
- **Next Run** - specific time until next scheduled run

- **Status** - status of the task (waiting, success, error, etc)
- **Task Queue** - the
- **Last Run** - the last time the task run was completed

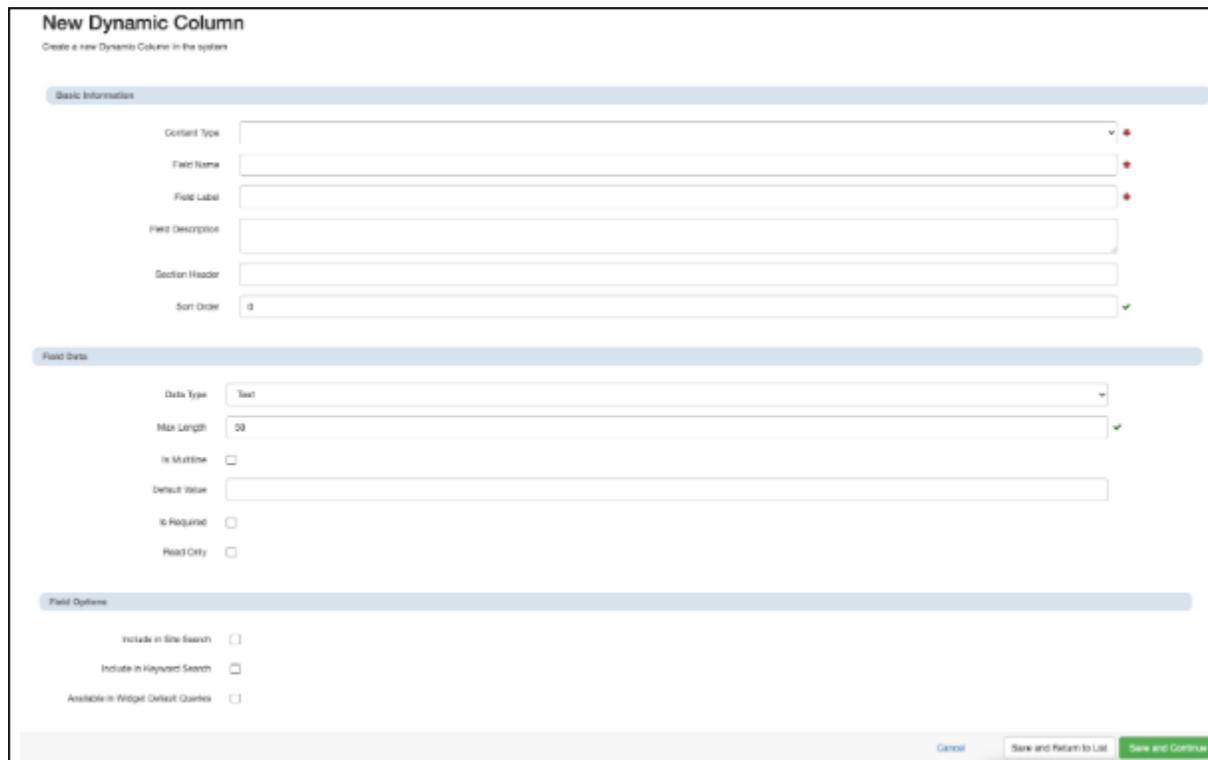
**Actions** - an administrator can manually kick off a task by selecting the **Run Task**  icon. The status will update to show the task is in progress. Additionally, selecting the **Edit** icon allows the administrator to view the task details, set schedule, and can also choose to run the task by selecting **Run Now**:



## Dynamic Columns

A Dynamic Column is used when there is not an appropriate field or field type available within the basic field set of the Provider, Location, Events content apps. This can be the case for either a user experience need or a data integration requirement.

To create a new Dynamic column, select the **New** button



There are three sections to be completed:

### Basic Information

- **Id** - a dynamically assigned numeral value
- **Content Type** - the content app data type (Provider, Location, Event)
- **Field Name** - admin side name of the field - this value can not be edited after creation
- **Field Label** - user side label; editable after creation
- **Field Description** - description of the dynamic column function
- **Section Header** - header that displays the field in the admin UI. Multiple fields with the same heading, and having sequential sort order values will share a single section header
- **Sort Order** - the order in which fields are displayed in the admin UI

### Field Data

- **Data Type** - the type of field - options are text, number, date, dropdown\*, content editor
- **Dropdown** - if data type = dropdown, configuration for the dropdown options appear here
- **Max Length** - numerical value of maximum character limit for field
- **Is Multi line** - if checkbox is selected, the field can accommodate multiple lines
- **Is Required** - if checkbox is selected, the field is required
- **Read Only** - if checkbox is selected, the field is read only

### Field Options

- **Include in Site Search** - if checkbox is selected, dynamic column is included in site search and accessible within custom lists
- **Include in Keyword Search** - if checkbox is selected, dynamic column is included in widget keyword search

- **Available in Widget Default Queries** - if checkbox is selected, dynamic column is available in the default query setting of search result widgets

### Wizard Options

**Wizard Step** - only used when content type = event. Dropdown field to dictate what step the dynamic column should appear within the wizard workflow

Once completed, select the **Save** or **Save and Return** to List button.

To **Edit** a record, select the **pencil icon**  to the right of the desired entry.

### Data Import

The Data Import configuration feature allows the CMS Administrator to configure data sources for import. As this feature requires additional set up and subscription services, please consult a WebMD Ignite representative for more information.



## Digital Quality Management

Digital Quality Management (DQM) is a platform that provides reporting, by a library of continually updated digital technical and legal specification standards on all issues detected on your site, whether your site is **Live**, in development or in **Staging**.

### HG CMS V3 DQM Capabilities

WebMD Ignite CMS Digital Quality Management (DQM) is a cutting edge, cloud-based platform that provides up-to-the-minute reporting, by a library of continually updated digital, technical and legal specification standards on all issues detected on your site, whether it is **Live**, in **Development** or in **Staging**.

HG CMS V3 DQM provides the only automated digital governance solution that integrates directly with your healthcare web Content Management Solution (CMS), assuring a high-quality, consistent customer experience across every page and asset of your site.

With DQM, you can quickly target and resolve SEO issues, which can affect how easily your pages are found, and ultimately conversion rates, using included best practices and rule customization.

With **DQM**, you can:

- View a consolidated analysis of error classifications on all your web pages from a central dashboard.
- Ensure Web Content Accessibility Guidelines (WCAG) 1.0 and 2.0 and Section 508 accessibility standards-compliant content. For more information, see [Accessibility in DQM](#).

- Easily correct details such as broken links, orphaned pages, readability and misspellings (in multiple languages), which can have a strong impact on public perception.
- Quickly target and resolve Search Engine Optimization (SEO) issues, which can affect how easily your pages are found, and ultimately conversion rates, using included best practices and rule customization.
- Quickly target and resolve URL structure and code issues, as well as privacy and cookie policy inclusion and mobile device optimization.
- Automatically monitor your digital properties 24/7, by crawling your sites, regardless of channel, with configurable frequency. (All dashboards are set up for weekly scanning.)
- Protect your brand with reporting for brand violations, such as usage of an incorrect logo or color palette, incorrect font, punctuation or image assets, consistent use of terminology, language clarity, use of prohibited terms, etc., across all digital experiences.
- Detects and tracks key digital assets across all of your sites, making it easy to review and replace files.

***Take your web presence to the next level by proactively detecting and resolving all major digital presence issues.***

## Accessibility in DQM definitions

Providing a good user experience is crucial for the success of any website. For users with limited abilities, browsing a website can be difficult. Improving your website so that it is easy to navigate for all users increases your range of potential customers and improves your SEO<sup>1</sup>.

### What is WCAG?

The World Wide Web Consortium (W3C) has published Web Content Accessibility Guidelines (WCAG) in order to help businesses make their websites accessible for users with disabilities, or users with limited devices (such as mobile phone and tablets). The latest guidelines released are the WCAG 2.0 on which DQM bases their checkpoints.

### What are accessibility Levels A, AA and AAA?

These levels indicate the degree of compliance. While level A covers the basic needs of a website to be easily accessible, level AA and AAA are based on higher standards. Most businesses aim to achieve a level of at least AA.

### What is a Benchmarking Score?

The **Benchmarking Score** will give you an indication of how compliant your website is to WCAG standards. The score ranks from 1 (low) to 10 (high). However, please note that the level AA and AAA contain checkpoints that cannot be tested by scanning your website. For those, you will need to check your pages manually. An example for a manual checkpoint would be, whether your website has supporting audio or whether the colors used in the design are easy to see for a person with impaired vision.

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<sup>1</sup>The object of Search Engine Optimization (SEO) is increasing targeted internet traffic and ultimately your Return on Investment (ROI). This is best achieved by improving your search rankings, by optimizing your pages, so that search engines can find them.

## Why is one checkpoint flagged for a lot of my pages?

There are a number of reasons why one checkpoint exists on many pages. The first reason could be that the flagged item is a part of your website's template and is shown incorrectly on every page. In this case, fixing the issue in one place will resolve many of your checkpoints at once. Another possible reason could be images without alt tags.

## What are alt tags and why are they important?

The **alt** tag is contained within the image tag `<img>`. Although **alt** and **title** are commonly referred to as **alt tag** or **alt text** and **title tag**, they are not actually tags. Alt and title are attributes of the HTML image `<img>` tag.

A complete HTML image **alt** tag is written as follows:

```

```

The **alt** text (**alt=**"") should describe the image and its purpose.

Images without alt tags are highlighted as checkpoints for a few important reasons. Configuration is available to restrict saving pages without an alt tag for all of your images, if desired.

Alt tags are important for 508 compliance screen readers, such as Job Access with Speech (JAWS), which generates audial speech and Braille output for users with vision impairment.

Images whose intent is strictly design-based, that are in the HTML of your page rather than in the preferred CSS, should have an empty alt tag attribute, for example: ``, so that screen readers will skip over that image.

Alt tags are also important for SEO. The **title** attribute is displayed as a tooltip when a site visitor hovers over the image. It can even be used as an additional call-to-action (CTA), for example: "This service is now offered at a reduced price!"

Alt tags with a title attribute also provide a text alternative for search engine crawlers and robots such as Googlebot and can positively impact search engine rankings. Images with correctly-formatted alt tag attribute titles influence both indexing and ranking of the page. They also enrich the user experience for those using browsers that cannot process images.

Another reason to use the title attribute: Firefox, Chrome, and other HTML W3C standard-compliant browsers won't display hover text for images if the title attribute is not present or is empty.

## Other common compliance errors

A warning for meaningless phrases such as "Click here." used for link text may seem trivial, but there is an important reason for this compliance flag. The intent is that link phrases should make sense when read out of context, for screen readers.

JAWS has an option to display a list of links on the page to the user. Along with this, JAWS has an option to list all headings on a page and is a popular way for visually-impaired users to orient themselves and more quickly discover what they're looking for in a document.

## Priority flag

Issues with priorities are flagged as displayed below.

3.1	All images should specify an "alt" attribute		580
-----	----------------------------------------------	--	-----

Non-compliance can be a costly mistake for websites that do not provide accessibility to all.

### Where can I find help understanding a checkpoint?

At the end of each checkpoint is an information **Why?** icon. Hover over this icon for a quick view of additional information regarding why resolution of this checkpoint is important. Click on the issue itself, and the Source tab to directly access the problem area in the code.

<b>12 issues found:</b>	
CONTENT PRESENTATION	
1.10 Use correctly nested headings	
LINKS	
2.2 Do not have links without content	
IMAGES	
3.1 All images should specify an "alt" attribute	<b>Why?</b> The "alt" attribute is designed to provide a short text description that can be used in place of the image. If the image does not convey any meaning, the "alt" attribute should be left empty.
TITLE & METADATA	
5.6 Pages should contain metadata	This indicates to assistive technology that the image can be safely ignored.

<b>12 issues found:</b>	Browser	Source	Issues are highlighted. Can't see them?
CONTENT PRESENTATION	Previous   Next		
1.10 Use correctly nested headings	<pre>154. &lt;rp style="margin: 0in 0in 0.00001pt; font-size: 11pt; font-family: Arial, sans-serif;"&gt;Click the &lt;strong&gt;Locations &lt;/strong&gt; widget, as shown below, or the specific &lt;strong&gt;Locations List&lt;/strong&gt; link from the &lt;strong&gt;Locations&lt;/strong&gt; menu.&lt;/pre&gt;</pre>		
LINKS	<pre>155. &lt;rp style="margin: 0in 0in 0.00001pt; font-size: 11pt; font-family: Arial, sans-serif;"&gt;&lt;/pre&gt;</pre>		
2.2 Do not have	<pre>156. &lt;img alt="How to contact app developers" data-bbox="248 648 752 667" style="display: block; margin: 0in 0in 0.00001pt; font-size: 11pt; font-family: Arial, sans-serif;"&gt;&lt;/pre&gt;</pre>		
	<pre>157. &lt;rp style="margin: 0in 0in 0.00001pt; font-size: 11pt; font-family: Arial, sans-serif;"&gt;&lt;/pre&gt;</pre>		

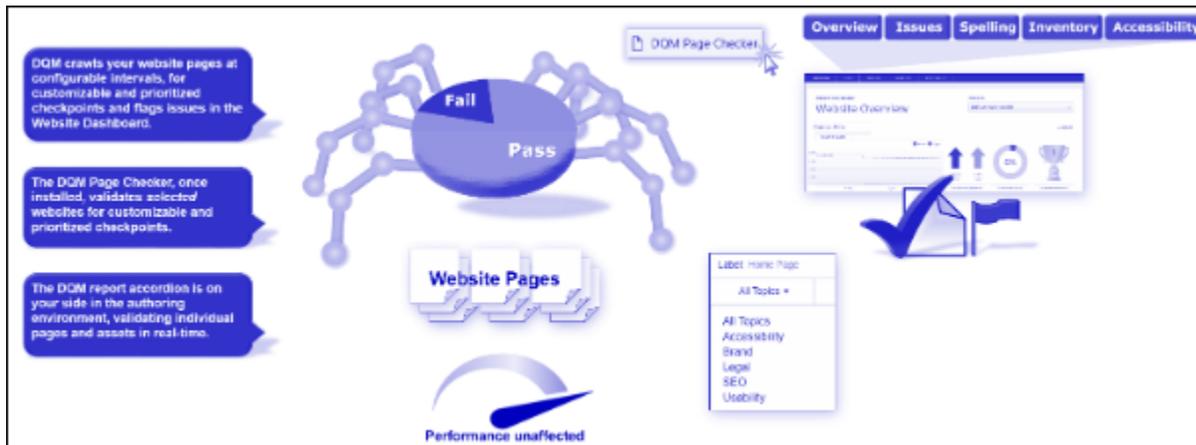
## How does the DQM platform work?

The **DQM** platform works on three levels. The **DQM** platform routinely crawls your websites and monitors for any violations based on the rules and priorities in place, without affecting performance. Crawl frequency is weekly. Priority issues are flagged for immediate attention.

This information is analyzed, organized and presented in an intuitive and comprehensive online dashboard, known as the **Website Dashboard**, to ensure quality and compliance for your live web presence.

Once installed, the **DQM Page Checker** tab validates any selected web page with one click, for these same brand, code, compliance, SEO and compliance risks, using the rules and priorities you have set.

As you are building your site's pages, the **DQM** report accordion validates against all of these configured rules in place, so that you can address any issues prior to publishing.



## Page Checker

When you receive your DQM user account and log in to the platform, you will notice an orange button at the top-center of the Website Dashboard Overview page.

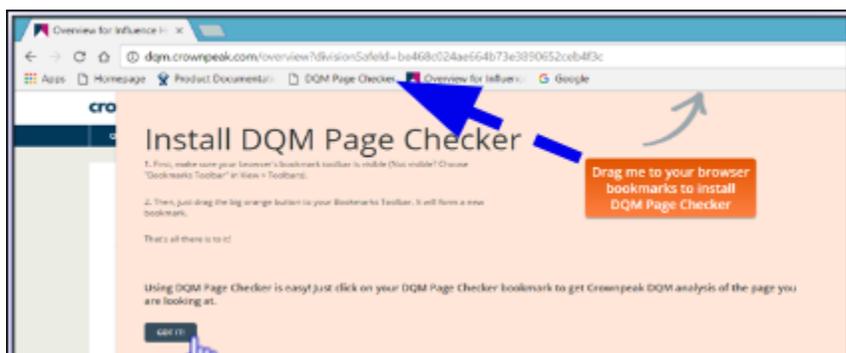
If you are in Chrome, first be sure the bookmarks bar is displaying (Ctrl + Shift + B). Click the Install DQM Page Checker button.



The instruction screen displays. Drag the orange box to the browser bookmarks bar, as shown below, in Chrome. You will see a "+" sign in a white box when you are over the correct area of the bar. Release the mouse button. The install is instantaneous. Click the Got it! button to close the instruction screen.



Once you have installed the DQM Page Checker, your browser view should have a bookmark, as shown below.



## Installing Page Checker in MS Edge

Installing the **DQM Page Checker** in MS Edge involves the same steps, with one exception.

You must first display the MS Edge Favorites bar, by, if you have not already, right-clicking to the right of the address bar and selecting Favorites Bar. This will provide space under the address bar for bookmarks.

Continue, as above using the **Install DQM Page Checker** button.



This is the **DQM Page Checker installed** in MS Edge. Go to a site and click it for an instant evaluation, based on the currently configured rules in place.

## Using the DQM Page Checker

You can now use the **DQM Page Checker** on any site. Go to any site, then click the **DQM Page Checker** bookmark we just created. You can view the issues on that web page listed, and highlighted as demonstrated on our demo site, for whichever issue you click.



You can check any site to compare how your site rates against competitors, without having access to the CMS.

*Assists your site editors in both pre and post publication mode.*

## Inline Quality Management

Let's start at the ground level, the authoring environment for your website. To analyze and correct an individual page in your site, you can use the dockable **Digital Quality Management** panel. With your page open in **Inline** view, you can see problem areas highlighted in yellow. Open the **DQM** panel by clicking **View > Digital Quality Management**.

The pie chart shows your **Pass/Fail** statistics visually and in percentages. The blue area and coordinating blue bullets below it, indicate compliant (**Pass**) items. The red chart percentage and bullets are your problem (**Fail**) areas. Use the drop-down menu to view **Pass/Fail** information by category.

Categories are: All Topics, Accessibility, Brand, Legal, SEO and Usability. The pie chart and bullets update accordingly. Errors and their solutions are defined in readable language with **View More** links for additional information, with **Web Content Guidelines (WCAG) 2.0** section references.

## Accessing the DQM Website Dashboard from the CMS Application

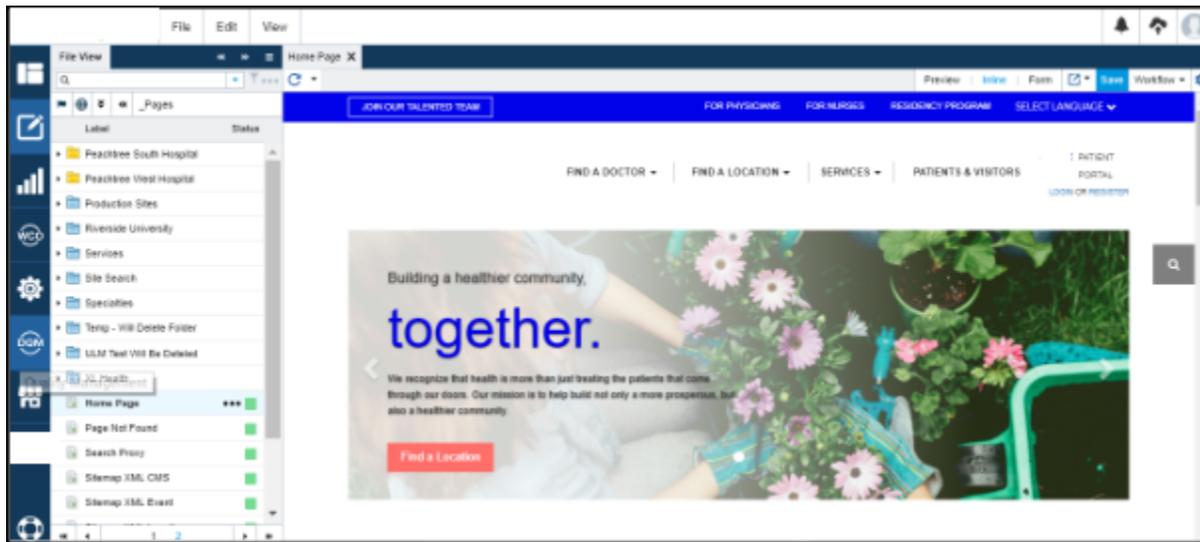
You can view DQM information from a couple of places in the CMS application. To quickly overview problem pages in your site and address them from one source, use the DQM Website Dashboard.

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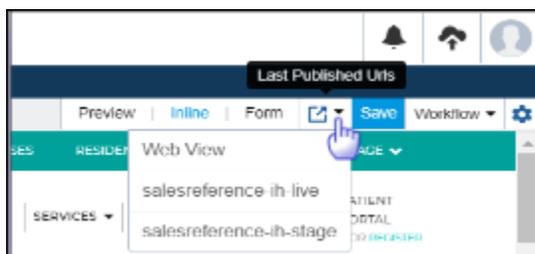
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- To access the DQM Website Dashboard, click the DQM icon from the left-hand panel. This is a link to the dashboard view. Log in with the username and password provided to you by your administrator.



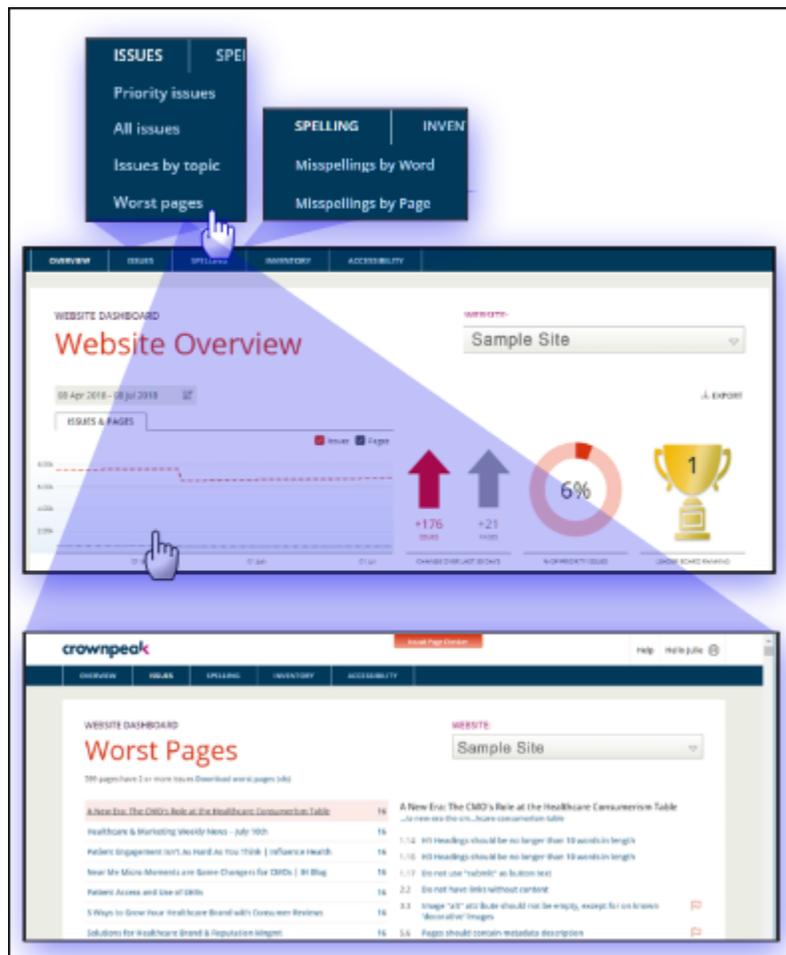
### Viewing a single page in the DQM Dashboard from the CMS Authoring Environment

You can also open a single page in the DQM Website Dashboard from within the CMS application. From an open page, whether in Preview, Inline or Form view, go to the Last Published Link icon and select an option. For our demonstration, we chose Live.



### DQM Dashboard (external)

The online **DQM Website Dashboard** is also known as **The Analyzer**. There are four tabs: Overview, Issues (with options: Priority issues, All issues, Issues by topic, Worst pages), **Spelling**, (with options: Misspellings by word, Misspellings by page) **Inventory** and **Accessibility**. You can tackle the largest issues first, by selecting **Worst pages** from the **Issues** tab menu.



Much of your time will be spent within **Issues**. **Issues** can be designated as prioritized. Standards can range from content presentation, links and images to URL structure and cookies. You can view the full list of **Issues**, as shown.

Working with these tools empowers your content management team, by reducing the chance of compliance issues that can be created, so they can focus on creating conversion-centric content for your organization.

You can have as many websites in the platform as desired and administer each one on a separate dashboard.

The following table lists all the rules from this page.

Category	Rule
Color: #132D77	All pages should contain headings.
Content	All pages should contain an <h1> heading.
Content	Do not use underlining to highlight text.

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Content	Large blocks of content should be broken up using subheadings.
Content	Do not artificially create bullet lists.
Content	Do not use bold <b> tags to emphasize text.
Content	Do not use italic <i> tags to emphasize text.
Content	Do not have multiple headings with identical text.
Content	All data tables should correctly define header rows and column headers.
Content	Use correctly nested headings.
Content	Do not create blinking text.
Content	Do not use justified text.
Content	Paragraphs should be no longer than 100 words in length.
Content	H1 Headings should be no longer than 10 words in length.
Content	H2 Headings should be no longer than 10 words in length.
Content	H3 Headings should be no longer than 10 words in length.
Content	Do not use "Submit" as button text.
Content	Do not overuse uppercase formatting.
Links	Do not use meaningless phrases such as "click here" or "more" as the entire link text.
Links	Do not have links without content.
Links	Indicate when a link will open in a new window.
Links	If an image is the only content in a link it must have "alt" text.
Links	Combine adjacent links together if they have the same destination.
Links	Broken external links.
Links	Broken internal links.
Links	Broken images.
Links	Do not make links too long.
Images	All images should specify an "alt" attribute.

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Images	Provide "alt" text for each clickable hotspot within an image map (not for mobile).
Images	Image "alt" attribute should not be empty, except for on known "decorative" images.
Images	Image "alt" text should contain more than one word.
Images	Graphical form buttons should have "alt" text.
Images	Do not provide text alternatives for decorative images.
Images	Images between 50 - 200 KB.
Images	Images between 200 - 500 KB.
Images	Do not use unsuitable image file formats.
Images	Images larger than 500 KB.
Rich Media	PDFs should be tagged for accessibility.
Rich Media	PDFs should have a meaningful title specified.
Rich Media	EMBED tags must have an associated NOEMBED tag.
Rich Media	Specify the file type when linking to non-HTML files.
Rich Media	Include information about document size within or next to the link.
Tile and Metadata	Does the page contain a title tag?
Tile and Metadata	Is the title tag populated?
Tile and Metadata	Does the title tag contain more than one word?
Tile and Metadata	Pages should specify the natural language of a document.
Tile and Metadata	Do not use meta refresh with a time limit.
Tile and Metadata	Pages should contain metadata description.
Tile and Metadata	Limit <title> tags to 60 characters or less.
Tile and Metadata	The title tag should contain the company name.
Tile and Metadata	Do not use multiple title tags.
Template	Copyright date should be the current year.
Writing Style	Do not use white space characters to control spacing within a word.

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Brand	Always capitalize the company name correctly.
Brand	Always spell the company name correctly.
URL Structure and Code	Do not use deprecated tags or attributes.
URL Structure and Code	Use relative font measurements.
URL Structure and Code	Use linked style sheets to control layout and presentation.
URL Structure and Code	If using frames (or iframes) make sure they are titled.
URL Structure and Code	ID values must be unique.
URL Structure and Code	Do not use "onmouseout" without "onblur".
URL Structure and Code	Do not use "onmouseup" without "onkeyup".
URL Structure and Code	Do not use "onmouseover" without "onfocus".
URL Structure and Code	Do not use "onmousedown" without "onkeydown".
URL Structure and Code	Table summaries must not duplicate table captions.
URL Structure and Code	Do not use scripting to remove focus when focus is received.
URL Structure and Code	Do not use pre-ticked boxes in forms.
URL Structure and Code	Do not use inline styles.
URL Structure and Code	Deliver all code as UTF-8.
URL Structure and Code	Do not use special characters within file or directory names (URLs).
Privacy and Cookies	All pages should contain a privacy link.
Privacy and Cookies	All pages should contain a link to cookies policy.
Privacy and Cookies	Do not use Flash.
Privacy and Cookies	Do not use graphics for spacing.
Privacy and Cookies	Do not use onmouse and onkey triggers within your scripting.
Privacy and Cookies	Set the viewport on pages.
Privacy and Cookies	Do not disable or suppress the ability to zoom.
Mobile	Do not use nested tables.

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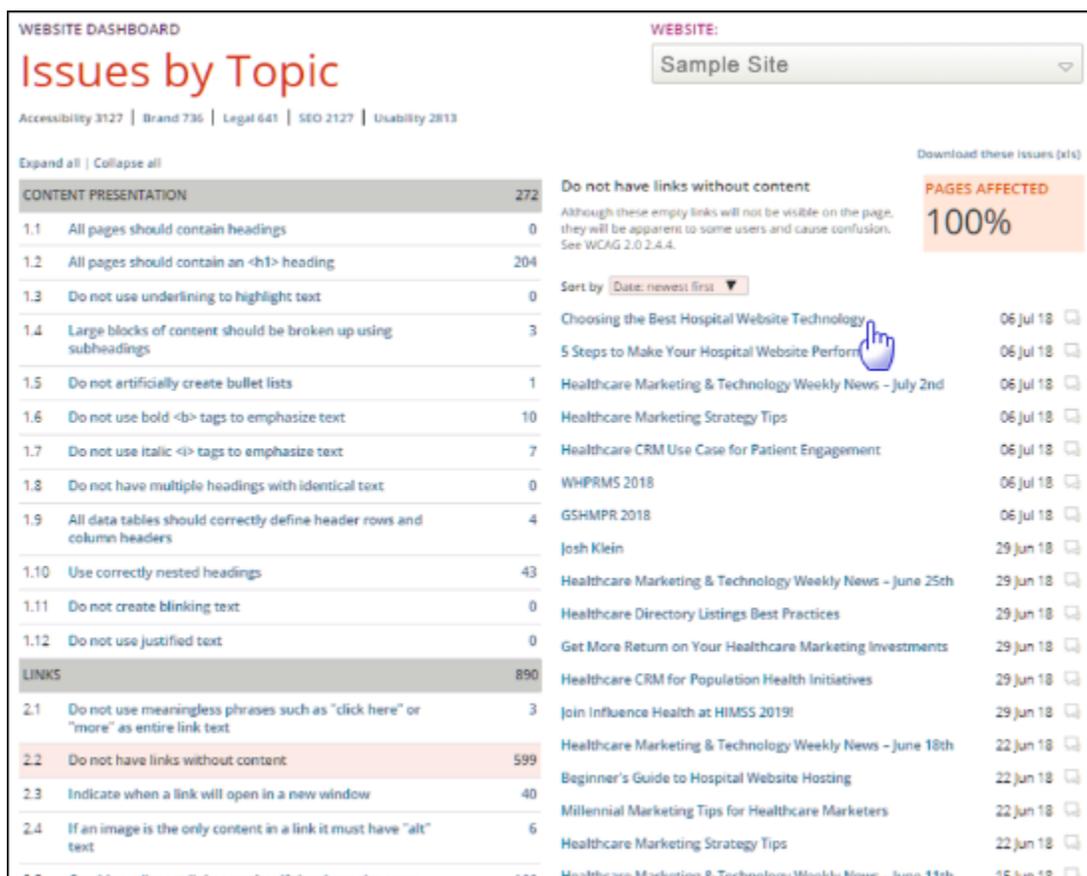
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Mobile	All pages should have a link to the desktop version of the site.
Mobile	Do not use the title attribute unless on a form input.

## Resolving an Issue by Topic in the Website Dashboard

For our demonstration of resolving issues in the **Website Dashboard**, we will look at **Issues > Issues by Topic, Links**. We clicked on the **Links** topic, **Do Not Have Links Without Content**. The right side of the page populates with the pages affected and statistics.

Clicking on a link displays the actual live page, where the link is broken, with the issue area highlighted in the **Source** code.



**WEBSITE DASHBOARD** | WEBSITE: Sample Site

Accessibility 3127 | Brand 736 | Legal 641 | SEO 2127 | Usability 2813

Expand all | Collapse all

Issue	Count
<b>CONTENT PRESENTATION</b>	<b>272</b>
1.1 All pages should contain headings	0
1.2 All pages should contain an <h1> heading	204
1.3 Do not use underlining to highlight text	0
1.4 Large blocks of content should be broken up using subheadings	3
1.5 Do not artificially create bullet lists	1
1.6 Do not use bold <b> tags to emphasize text	10
1.7 Do not use italic <i> tags to emphasize text	7
1.8 Do not have multiple headings with identical text	0
1.9 All data tables should correctly define header rows and column headers	4
1.10 Use correctly nested headings	43
1.11 Do not create blinking text	0
1.12 Do not use justified text	0
<b>LINKS</b>	<b>890</b>
2.1 Do not use meaningless phrases such as "click here" or "more" as entire link text	3
<b>2.2 Do not have links without content</b>	<b>599</b>
2.3 Indicate when a link will open in a new window	40
2.4 If an image is the only content in a link it must have "alt" text	6
2.5 Combining adjacent links together if they have the same...	...

**Do not have links without content**  
Although these empty links will not be visible on the page, they will be apparent to some users and cause confusion. See WCAG 2.0 2.4.4.

Sort by: Date: newest first

**PAGES AFFECTED**  
100%

Page Title	Date
Choosing the Best Hospital Website Technology	06 Jul 18
5 Steps to Make Your Hospital Website Perform	06 Jul 18
Healthcare Marketing & Technology Weekly News - July 2nd	06 Jul 18
Healthcare Marketing Strategy Tips	06 Jul 18
Healthcare CRM Use Case for Patient Engagement	06 Jul 18
WHPRMS 2018	06 Jul 18
GSHMPR 2018	06 Jul 18
Josh Klein	29 Jun 18
Healthcare Marketing & Technology Weekly News - June 25th	29 Jun 18
Healthcare Directory Listings Best Practices	29 Jun 18
Get More Return on Your Healthcare Marketing Investments	29 Jun 18
Healthcare CRM for Population Health Initiatives	29 Jun 18
Join Influence Health at HIMSS 2019!	29 Jun 18
Healthcare Marketing & Technology Weekly News - June 18th	22 Jun 18
Beginner's Guide to Hospital Website Hosting	22 Jun 18
Millennial Marketing Tips for Healthcare Marketers	22 Jun 18
Healthcare Marketing Strategy Tips	22 Jun 18
Healthcare Marketing & Technology Weekly News - June 11th	15 Jun 18

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Analyzing: <https://www.sample.com/white-papers/7-steps-to-select-the-right-healthcare-cms>

FILE DETAILS | ISSUES (10) | SPELLING (0)

10 issues found | 2.2 Do not have links without content

**Warning**

Warning: this page breaks your accessibility target level

Issues Highlighted

CONTENT PRESENTATION

1.2 All pages should contain an <h1> heading

LINKS

2.2 Do not have links without content

TITLE & METADATA

5.8 The title tag should contain the company name

URL STRUCTURE & CODE

9.1 Do not use deprecated tags or attributes

9.4 If using frames (or iframes) make sure they are titled

9.5 ID values must be unique

```

79. <li><a href="https://www.facebook.com/InfluenceHealth" target="_blank"></a></li>
80. <li><a href="tel:855-432-9182" target="_self"></a></li>
81. </ul>
82.
83.
84. <form id="search" class="form-inline" role="form">
85. <div class="form-group">
86. <div class="input-group">
87. <input type="text" id="globalSiteSearchBox" placeholder="Search this site..." onfocus="this.placeho
lder="" onblur="this.placeholder='Search this site...'" class="form-control ui-autocomplete-input"
autocomplete="off" onkeydown="if (event.keyCode == 13) {event.preventDefault();document.getElementById('siteSearchButton').click();}">
88. <span class="ui-helper-hidden-accessible" role="status" aria-live="polite"></span>
89. <div class="input-group-addon searchBtnContainer">

```

Although these empty links will not be visible on the page, they will be apparent to some users and cause confusion. For example, some browsers will allow tabbing to empty links and assistive technology will also announce the presence of a link.

In addition, they will be picked up by search engines, which may interpret them as spam and penalize the website.

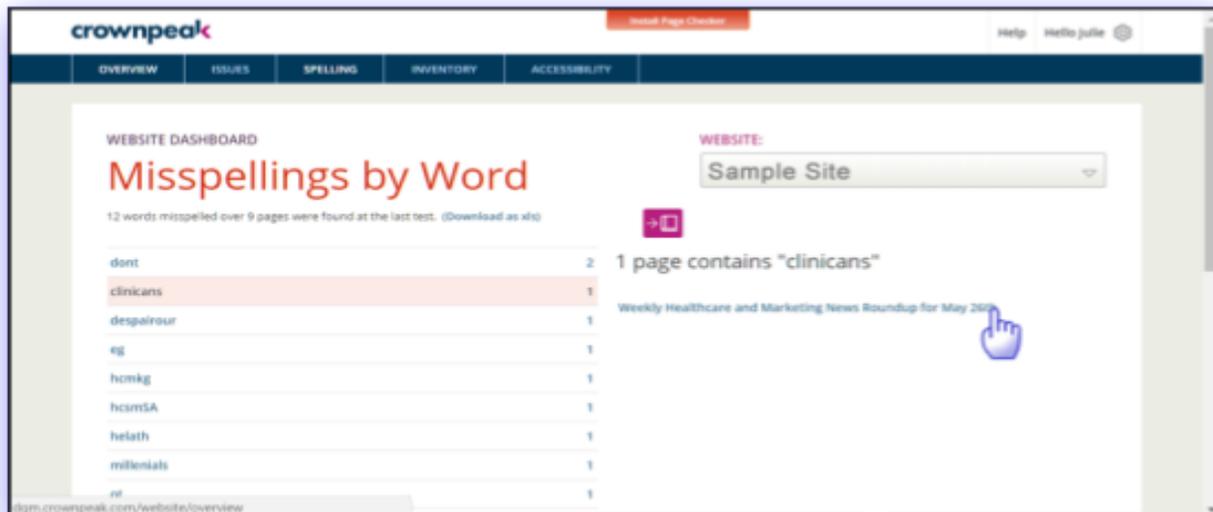
Click the Information icon ⓘ to view why resolving links without content is important. The text states: Although these empty links will not be visible on the page, they will be apparent to some users and cause confusion. For example, some browsers will allow tabbing to empty links and assistive technology will also announce the presence of a link.

**In addition, links without content will be picked up by search engines, which may interpret them as spam and penalize the website.**

### Misspellings by Word

Check **Misspellings by Word** under the **Spelling** tab of the **Website Dashboard** application. The misspelled word list for your entire selected site loads in the viewer area. Click the misspelled word and the pages where it appears load in the right panel. Click the page link and as we demonstrated above, you can click the **Source** tab and go directly to the misspelled word in the code without scrolling, or you can view the highlighted text in the **Browser** tab view.



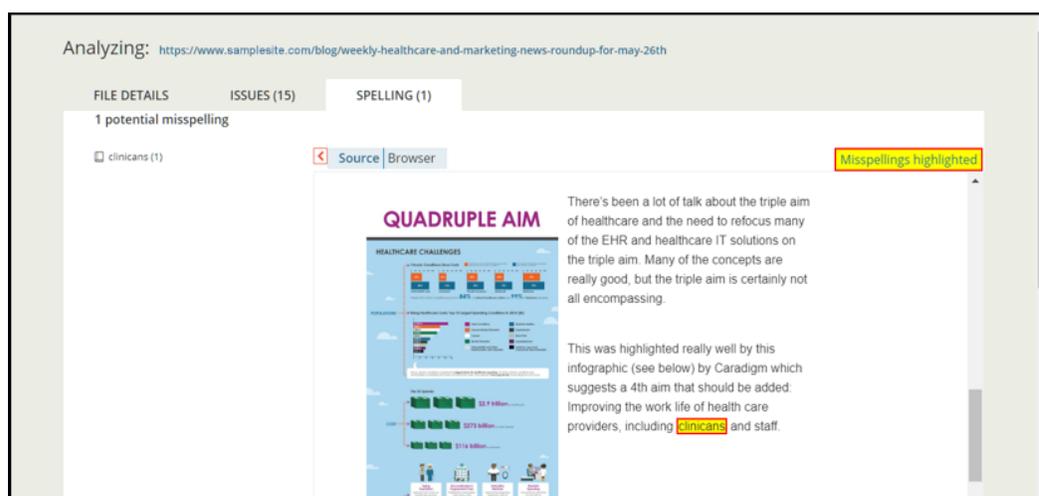


In the **Browser** tab view, once the page launches, you can use the standard <Ctrl+F> keyboard command to search the misspelled word on the page. Click on the **Misspellings Highlighted** button at the top right of the page to display information

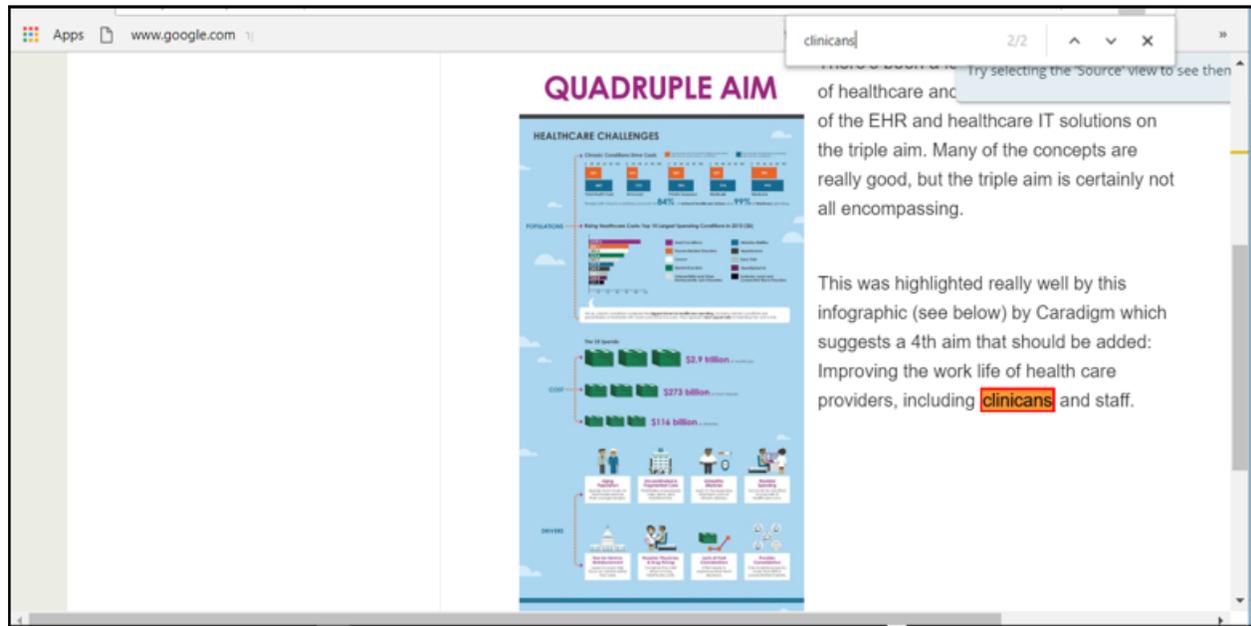
Crownpeak DQM is highlighting misspellings on this page. If you can't see them, it is probably because they are:

- within a layer or menu that needs to be clicked on to see
- within code that has been commented out
- only visible to users without stylesheets or Flash
- within an element not designed to appear on the page

Try selecting the **Source** (code) view to see them all.



## Using the Search Function



### Taking inventory

The **Inventory** tab, as its name implies, lists all the assets of your website by category. Each asset type, such as **Images**, displays the count of that type of asset and is an active link that provides the pages of occurrence and their links.

**File Assets** are listed by: Images, Acrobat Documents, Word Documents, Excel Documents, PowerPoint Documents, ZIP Files, CSS Files, All Flash Files, WMV Files, Flv Files, Mp3 Files, Mp4 Files and JavaScript Files.

**Content Assets** are listed by: All emails used, Title tag frequency, Links to external websites, All data collection forms,

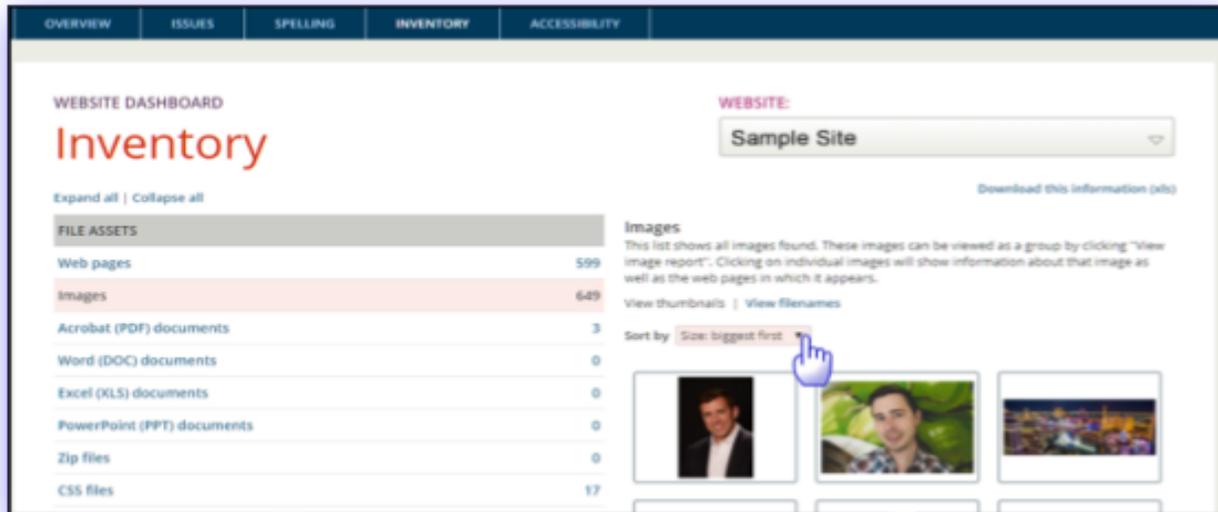
**Metadata** is listed by: Pages without metadata keywords, Pages without metadata description,

**Cookies** are listed by: Pages using Facebook widgets that set cookies, Pages using Twitter widgets that set cookies, JavaScript files setting cookies, Persistent cookies by type, Pages using HTML5 local storage code, Pages using HTML5 session storage code.

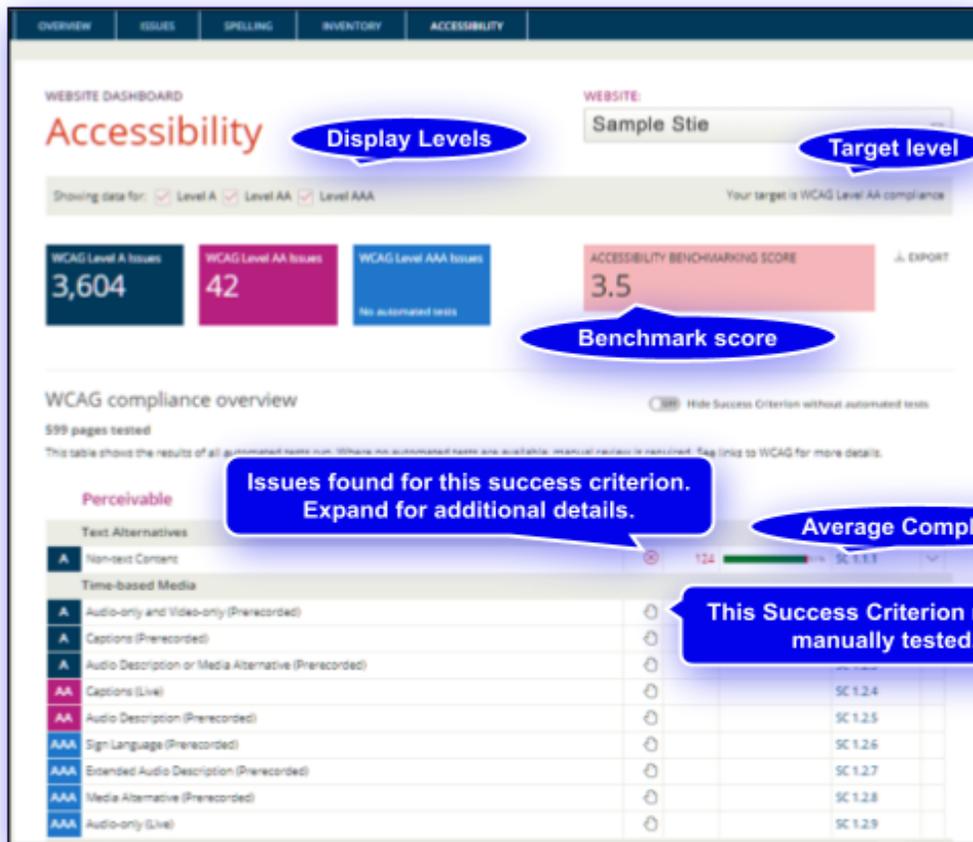
### The Accessibility Tab

The **Accessibility** tab is a rich source for WCAG compliance information. From this page you can analyze and correct all issues that might limit accessibility to your web content. Your chosen target level is displayed at the top right of the screen. Here, it displays as: Your target is WCAG Level AA compliance.

You can choose the target levels to display here, by checking one or all of the following: **Level A**, **Level**



**AA or Level AAA.** You can also toggle **Hide Success Criterion without automated tests**. The top-left panel displays the number of issues for each level and their benchmarking score, with a ranking from 1–10. Each link on the right takes you to the specific W3 Consortium checkpoint. As with all other checkpoint pages, drill down from the topics listed on the left to see additional detail and link to affected pages. Not shown below, the checkmark icon indicates no issues were found, but manual testing is still required.



## How does DQM check for broken links?

When **DQM** scans your site, it records every single link it encounters. Each of these links is tested to check whether it should be flagged as broken, using HTTP response codes returned from the server.

The table below details how DQM handles HTTP response codes, by type.

HTTP Response Code	Marked as a broken link?	What the code indicates
400 – 499	Yes	Codes that fall within this range indicate an error with the page. Common statuses such as 404 fall within this range.
401	No	This code indicates that authentication is needed to reach the page that has not been provided. The classification is "unauthorized".
403	No	This code indicates that the server understood the request, but has refused to fulfill it. The classification is "forbidden".
407	No	This code is similar to the 401 classification, but indicates that the DQM should authenticate itself with the proxy. The classification is "proxy authentication required".
500 – 599	No	This code indicates that the server could not service the request made by the DQM. This can occur sporadically when the server gets busy.
300 – 399	Link check is repeated on redirected URL	This code indicates that the server is redirecting the DQM to another page. The DQM link checks the new URL also. To prevent these redirect loops, a rule marks a link visited more than seven times sequentially as broken.
200 – 299	No	Codes that fall within this range indicate a successful response. These site pages are also checked to see if the page in question is an error page.

These default responses can be modified if required. Contact your implementation representative, if you'd like to discuss this.

### Other reasons links can be marked as broken

Along with the HTTP server codes above, a link will also be flagged as broken if an error occurs at any part of the page's download process. Reasons for such errors include:

- The Host part of the URL is not valid
- An issue with downloading the page via SSL
- An attempt to connect or read times out. Connects time out at 1 minute, reads time out at 2 minutes
- Illegal characters in the URL
- Illegal characters in the URL that DQM is redirected to
- The response code indicates a redirect, but gives no URL for the redirect

### Excluding links from the link-checking process

DQM can ignore URLs, or parts of URLs that do not need to be checked. For example: login pages. Contact your implementation representative if you would like to add some broken link exclusions to your DQM configuration.

## Reducing errors reported in Website DQM Reports

Our goal is to make Website DQM reports as meaningful and concise as possible by reducing unnecessary or unwanted errors. Here are some areas that can inflate the error count:

- Third Party code that we do not own or author
- Client-authored documents
- Page source content

### Broken links

CMS scans the content of \*.pdf and \*.doc files for broken links. Broken links from legacy documents included with broken links found on pages can also inflate error count. CMS can exclude certain URLs or parts of URLs, reducing the number of reported errors for broken links.

The list of full or partial URLs must be provided and placed on an exclusion list. We can also request that URLs ending with designated extensions be ignored, such as: .pdf, doc, ppt or others. Once provided, DQM will skip scanning for broken links inside these types of client document

**EXCLUDING LINKS FROM THE LINKCHECKING PROCESS**

Crownpeak DQM can ignore parts of or whole URLs that do not need to be checked (e.g. login pages). Please inform the Product Support team if you would like to add some broken link exclusions to your Crownpeak DQM configuration.

---

**File**

---

<b>Article Number</b>	<b>Last Published Date</b>
00001016	6/7/2017 7:54 AM

Alternately, the **2.10 PDFs – Documents with broken links** checkpoint can be suppressed completely on client request.

Checkpoint	Description	Count
2.8	Combine adjacent links together if they have the same destination	16
2.9	Link text longer than 80 characters in length	115
2.10	PDFs - Documents with broken links	289
IMAGES		1170
RICH MEDIA		8387
TITLE & METADATA		8517

Errors can sometimes be flagged in more than one checkpoint. Errors flagged by the 2.10 checkpoint can show up in both **2.1 Broken external links** and **2.2 Broken internal links**.

### Cautionary points

When requesting exclusions by full or partial URL, consider if there are other pages or assets that share the full or partial URL with the \*.pdf files. If there are other assets that would be affected by an exclusion by URL or partial URL, then be sure to specify the file extension in the exclusion. You can also describe the end result you are hoping to achieve to your implementation representative, who can give you suggestions on how best to exclude specific files.

### ADAM Content

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Adding American Accreditation HealthCare Commission (ADAM HRA) content will cause error counts in most checkpoints to escalate. This content contains many images and image maps without alt attributes. There are also errors that get flagged for **Rich Media** checkpoints.

As we do not have any control over the ADAM code, a request to exclude all ADAM content from being scanned will be needed. ADAM content is onion-like; it is not a single product but a collection of product IDs, therefore ADAM exclusions are defined by individual product IDs.

Once ADAM has been successfully excluded from the Website DQM scan, it can again show up if a client adds a new or different product ID. When clients update or add new ADAM products to their site, we need to request a re-scan and provide notification of the new product IDs.

ADAM exclusions can require some fine tuning. Following is a helpful chart and some tips that should be helpful.

Indicate the exact product ID (productId) used by the client.

PRODUCT NAME INCLUDED WITH ADAM SE PRODUCTID= 127	PRODUCT ID
ADAM Health Illustrated Encyclopedia Multimedia	productId=117
Thomson Drug Notes	productId=45
ADAM Wellness Tools	productId=20
ADAM Health Navigator	productId=65
ADAM Pregnancy Health Center	productId=14
ADAM Complementary and Alternative Medicine	productId=33
ADAM Health Illustrated Encyclopedia Multimedia (Catholic filtered)	productId=5117
Thomson Drug Notes (Catholic filtered)	productId=5045
ADAM Wellness Tools (Catholic filtered)	productId=5020
ADAM Health Navigator (Catholic filtered)	productId=5065
ADAM Pregnancy Health Center (Catholic filtered)	productId=5014
ADAM Complementary and Alternative Medicine (Catholic filtered)	productId=5107
MyCheckUps	productId=43

#### Tips

Use the word “article” in the exclusion rule; for example, request exclusion of all URLs that have the following string: “article?productId=43”, “article?productId=65”, “productId=5107”, etc.

You cannot refer only to “productId=127”; you must list each productId included in SmartEngage to successfully exclude ADAM content.

Clients might be using older ADAM products or contract directly with ADAM for their 3<sup>rd</sup> party content. Some URLs for article pages might be using ADAM2004\_ or other similar URL parameters. ADAM offers mixed content, so it is a good idea to also exclude the following:

- adam.com
- www.adam.com
- http://adam.com
- https://ssl.adam.com

The following are examples of other exclusions asked for on behalf of our clients. They are specific to those clients but will give you an idea of how to request exclusions.

You should exclude code found in HTML comments. At least one client had commented out code in the page source of at least 90% of the pages. The commented-out code contained <img> tags without alt attributes. As the code was throwing errors, the following exclusion was asked for:

Please exclude any <img> tag with or without **alt** attributes found inside a comment tag.

The comment tags being used are <!-- --->, but also we should exclude <!-- --> comments as well.

Example, there are places in the page source similar to the following:

```

<!--<div class="cta-overlay">
<div class="overlay">
<h4>Book Your Yearly Physical Online</h4>
<p><a class="btn btn-outline" href="/schedule-an-appointment-online/default.aspx">Request
Appointment</a></p>
</div>
</div>
</div>
</div>
</div>
</div>-->

```

### Images from cross-site origin or external sources

For clients using forms which include buttons and images from an external source, you can ask to exclude scanning image tags that contain specific URLs For example:

Please exclude any <img> where the src is https://bbox.blackbaudhosting.com/webforms/images/. Since the image is coming from a source over which we have no control to change, we should exclude this from being reported as an error.

Example, the following is found in the page source:

```



```

### Default images which are used for display or decoration only

You can exclude certain image tags from the scan, but these images must have an alt attribute in the <img> tag. They must be able to pass the “3.1 All images should specify an “alt” attribute” checkpoint. If the decorative or presentation role image passes the 3.1 checkpoint, but is flagged by the “3.3 Image alt attribute should not be empty, except for on known, decorative images” checkpoint, you can exclude it from the scan by asking for the following:

Any <img> tag where the image file name has "\_default\_"  
In the class ih-blog ih-blog-detail is see images that are decorative.

Example, the following can be found in page source:

```
<div class="ih-blog ih-blog-detail">  

```

But, remember: the <img> tag must include an alt attribute (alt=""); this tells accessibility technology to ignore and not attempt to read the alt as it is NULL. The criteria for an image to be considered “decorative” are:

- the image is not used as a link
- the image is decorative; if it was removed, no information would be lost
- the <img> tag includes an empty alt attribute (alt="")

### Turning off or suppressing checkpoints

Some clients have requested to turn off or suppress certain checkpoints. Before turning off or suppressing a checkpoint, consider the following:

- Is the checkpoint evaluating a key accessibility level? If it is turned off will the website not reach the accessibility goal the client wants to achieve?
- Is the checkpoint being turned off only to cut down on the error count? If so, the error will still be present and it might not be noticed. Also disabling one checkpoint doesn't mean the error will disappear, it might show up in another checkpoint.

## Other Frequently Asked Questions (FAQ)

### How does the crawl of the site affect performance?

The running site crawler is equivalent to a one-person page hit.

### How many checkpoint issues come with the platform?

There are 77 standard checkpoint issues. You can customize these standards for both code and content, including by country. You write the logic. There are also complex checkpoints in place for twitter tags and attributes, client IDs, etc.

### What browsers does the DQM Platform support?

The DQM Platform supports the following browsers:

- Internet Explorer 11.0
- Latest version of Firefox
- Latest version of Chrome

## Browser support

CMS DQM supports the following browsers:

- Internet Explorer 11.0
- Latest version of Firefox
- Latest version of Chrome

## Logging in to the DQM

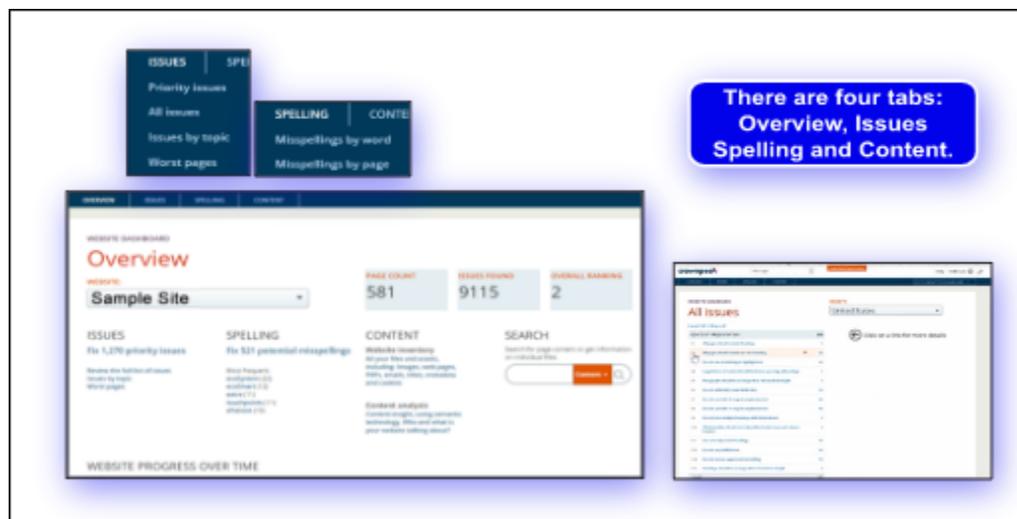
Access the new DQM by using a link. <http://dqm.crownpeak.com/>

## Another point of view, the website dashboard overview (18)

- The online DQM Website Dashboard also known as the Analyzer.
- There are five tabs: Overview, Issues (with options: Priority issues, All issues, Issues by topic, Worst pages), Spelling, (with options: Misspellings by word, Misspellings by page) Inventory and Accessibility.

## Issues: Categories and rules

Most of your time will be spent within Issues. Issues can be designated as prioritized. Standards can range from content presentation, links and images to URL structure and cookies. You can view the full list of Issues, as shown.



Working with these tools empowers your content management team, by reducing the chance of introducing compliance issues, so they can focus on creating conversion-centric content for your organization.

You can have as many websites in the platform as desired and administer each one on a separate dashboard.

The table on your screen lists all the rules from this page. Use the scrollbar to view them all.

## Managing your SEO using the DQM Overview Dashboard screen

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To quickly manage your SEO using the DQM Overview Dashboard screen, go to the **Issues** tab and select **Issues by Topic**.

From this screen, select the SEO category.

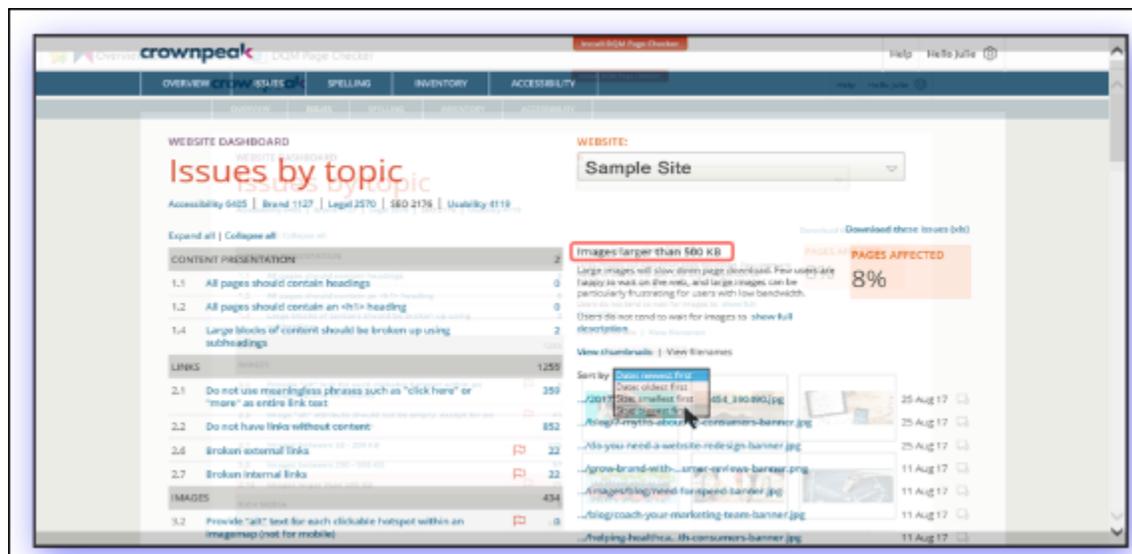
The issues that are pertinent to SEO optimization are provided by topic: Content Presentation, Links, Images, Rich Media and Titles and Metadata. Each category displays the number of occurrences.

Expand a category to immediately address those issues, in context from the Overview page. Let's look at one of the major issues that directly affects not only your site's ranking but user experience and response, Page Load Performance. You can speed up page loading time by optimizing your images, with the goal of making file sizes as small as possible, without sacrificing image quality.

Large images slow down page download, which can cause visitors to leave your site and go elsewhere, affecting the time spent on that page. This is an important ranking factor that tells Google how relevant your page is to visitors.

**Note:** Page download speeds of more than one second are subject to search engine penalties when exceeded, and affect not only consumer engagement but whether that consumer will ever return to your site.

Google estimates that 61% of users are unlikely to return to a mobile site they had trouble accessing and 40% visit a competitor's site instead.

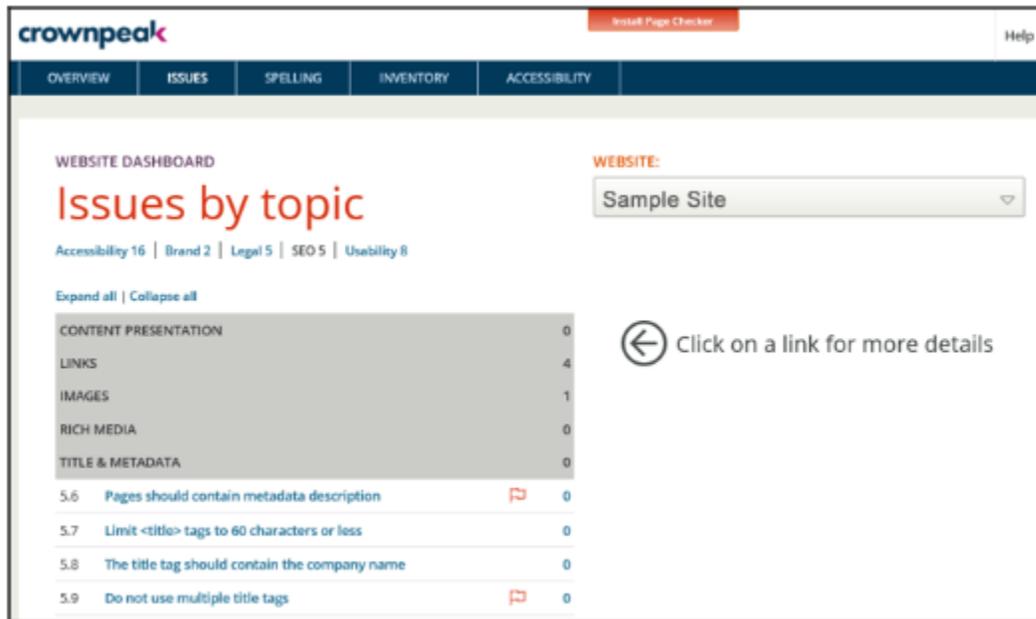


Here, we clicked Images larger than 500 KB. View the images under this category by thumbnails or filenames and sort by size or date. Click on an image to see additional properties and a list of how many pages in your site the image is linked to, listed by links to each affected page in your site, so that you can address the issue and see the result.

## Address metadata keywords by page

Remember those keywords we discussed earlier? You can quickly analyze and address their usage in every page of your site, by going to Issues by Topic > TITLE & METADATA, you can view pages without Metadata Keywords or Metadata Descriptions, with counts and a link to each individual page. Once a result link is clicked, you can sort page results in ascending or descending order by date, name and size. Rules below are:

- Pages should contain metadata description
- Limit <title> tags to 60 characters or less
- The title tag should contain the company name
- Do not use multiple title tags



## Optimal keyword density and modern SEO power strategies and tips

Remember those keywords we discussed earlier? You can quickly analyze and address their usage in every page of your site, by topic, with counts and a link to each individual page. Once a result link is clicked, you can sort page results in ascending or descending order by date, name and size. You can achieve maximum search engine effectiveness, by utilizing some strategies with this powerful tool. The following page elements are the best places to use keywords for maximum impact on your rankings.

### Meta Description Tag

The content of this tag displays on the search engine results page, below your Page Title. This tag should be on every page and customized by page. Quickly address all pages without this tag from one location by going to Issues > Issues by Topic > SEO > TITLE & METADATA. The Website Dashboard Analyzer returns results and links for pages breaking configured meta description rules such as:

- Pages should contain metadata description

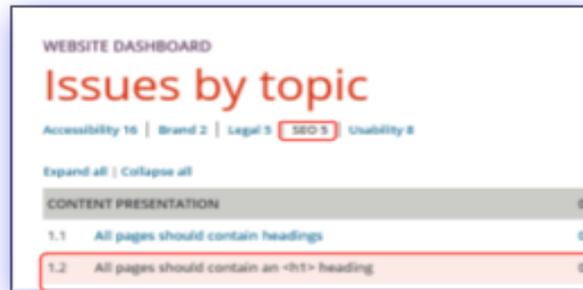
### Title Tag

This is not the Page Title. This text displays in bolded blue text on Google search engine results pages. Also, under Issues > Issues by Topic > SEO > TITLE & METADATA are rules such as:  
Limit <title> tags to 60 characters or less

The title tag should contain the company name  
Do not use multiple title tags

## Page Title

This is the actual page title your visitors see on the pages of your site. Don't use images, include your keywords, and enclose in an <h1> tag. Access and address under Issues > Issues by Topic > SEO > Content Presentation.



## HTML and JavaScript

SEO ranking calculation evaluates how high up on the page keywords appear. Externalizing JavaScript leaves more room in the top portion of your pages' code.

## Site Text

Utilize your keywords well in the text of your site, but with an eye toward high readability. 3–6% density is a good rule of thumb to avoid the risk search engine spam labeling.

## Keywords in Links

Use your keywords in the links on your site and in the Name Attribute of your link tags, as well as in your sidebar and footer.

## Alt Tags

Each image on your site should have an Alt Tag.<sup>2</sup> Alt Tags are important for 508 compliance screen readers, such as Job Access with Speech (JAWS), which generates audial speech and Braille output for users with vision impairment. You can also utilize this descriptive text to include your keywords!

Address every page with missing alt tags by clicking Issues > Issues by Topic > Images.

<sup>2</sup> An alt tag, also known as "alt attribute" and "alt description," is an HTML attribute applied to image tags to provide a text alternative for search engines. Applying images to alt tags such as product photos can positively impact an ecommerce store's search engine rankings.



**Note:** Non-compliance can be a costly mistake for websites that do not provide accessibility to all.

## Filenames

**Filenames** of pages and images are another place to include your keywords. **Filenames** displayed in page URLs and using keywords here can really help your rankings. Optimize those URLs using the **LINKS** category under **Issues by Topic > SEO**.

## Your Domain Name

Use your primary keyword in your domain name, if possible for considerable improvement in your rankings, because this implies to the search engine that the entire content of your site is centered around your keyword.

<http://www.wordstream.com/meta-tags>

## Supported browsers for CMS and Crownpeak

Below is a list of the browsers that are currently supported by both CMS and Crownpeak. These browsers have been tested and support both PC and Mac operating systems.

- Latest version of Chrome
- Latest version of Safari
- Latest version of Edge

Other browsers (Firefox, Brave, Opera, etc.) may also work, however, these, as well as older versions of those listed above, may not offer the same experience and functionality of the most recent versions of our supported browsers.

## Questions?

While one of the most obvious advantages of CMS's features is its ease of use, we understand that you may have questions. Should you need additional training on a specific capability of the CMS application, or just need to develop a deeper understanding of how to most effectively wield its powerful potential, please reach out to our responsive delivery or support teams.