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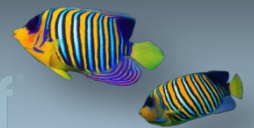


# NEOREEF ONENET

## Administration Guide

This document covers usage of the Neoreef OneNet platform core features.

neoreef



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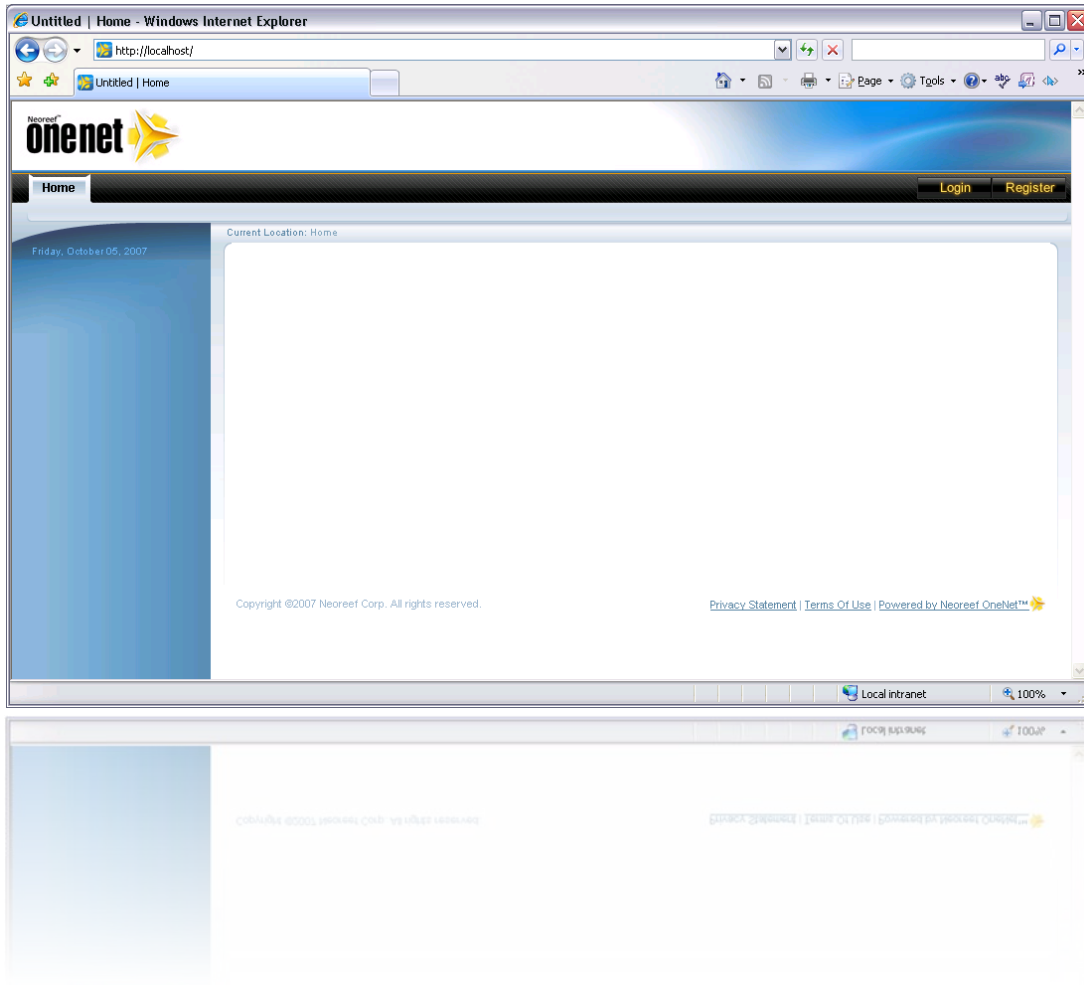
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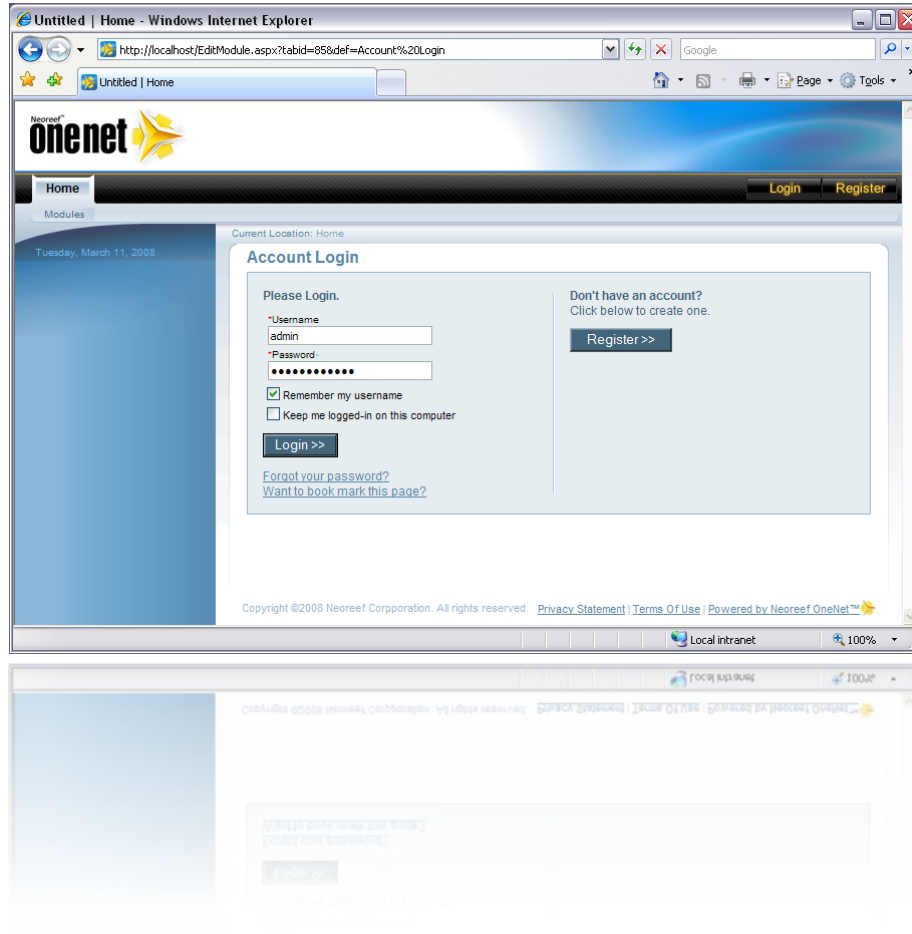
## Section 1: Introduction

Neoreef OneNet is an on-demand web platform that empowers the individual to create and deliver dynamic and innovative content and services on the web, increasing their productivity and producing better results for your organization. Whether it's publishing content to the internet, collaborating on a project over an intranet, or engaging with partners over an extranet, Neoreef OneNet enables organizations to leverage the web without worrying about the underlying complexities.



## Section 2: Getting Started

The first step in using Neoreef OneNet is to authenticate or login to the system. You must use an account with administrative privileges.



### Login

1. Click on the “Login” link located at the top right section of the site.
2. Enter your username and password.
3. Click on the “Login” button.

### Logout

Click on the “Logout” link located at the top right section of the site.

### Register a New User Account

Click on the “Register” link located at the top right section of the site.

### Password Reminder

1. Enter your username.
2. Click on the “Password Reminder” button. Your password will now be emailed to the email address you provided upon registration.

## Section 3: System Interfaces & Terms

The following overview describes the primary user interface elements of the system, including the common controls and information.

### Admin Toolbar



### Admin Toolbar Interface

- The Admin toolbar permits administrators to configure the site settings, organize and edit pages, user accounts, security roles, vendor accounts, and files, as well as send bulk email. The admin toolbar is accessible only to users added to the Administrator security role. (See **Administrator Tools** for more information.)
- The Admin toolbar contains shortcuts to commonly used functions within the site. The toolbar enables you to Add New Pages and Edit Page Settings. Additionally, the Module Toolbox is located within the OneNet Toolbar.
- The Module Toolbox contains a dropdown list of all of the subscribed modules for the site. Modules are easily added to pages by selecting a module from the module menu.
- Modules are the building blocks that permit the Administrator to add content to the site. Each module is designed to manage a common type of online content such as a list of FAQ's, a calendar of events, or a list of downloadable documents to name a few.

### Recycle Bin Interface

The Recycle Bin allows you to recover deleted pages and modules. Items will remain in the Recycle Bin for 30 days from the time they were deleted.

- **Pages Folder:** When pages are deleted they are moved to the "Pages" folder.
- **Modules Folder:** When modules are deleted that are moved to the "Modules" folder. If the parent page that contained the module is deleted, the modules will be removed from the modules folder because they cannot be restored until the parent page is restored.
- **Delete [X]:** Permanently deletes the selected item and/or any sub items.
- **Restore [↶]:** Restores the selected item and/or any sub items.
- **Sub Menu [≡]:** Access "Restore All" and "Empty Recycle Bin".



## Common Terms

**Administrator (Admin):** Security Role permitting full site administration rights. The Administrator has full access to all pages and modules. This means an Administrator is able to add, edit, and update all pages and modules within the site. The Admin also has access to the Admin Toolbar, permitting management of security roles, members/users, bulk email, site settings, vendor management and file management.

**Module:** A module is the building block that permits the Administrator to add content to the site. Each module is designed to manage a common type of online content such as a list of FAQ's, a calendar of events, or a list of downloadable documents to name a few.

**Module Settings:** Module Settings control the Security Role access for the module, displaying page, module container design, and more.

**Zone/Pane:** A zone or pane is an editable region on a page. By default, each page can display at least one, two, or three panes. Modules appear on the "Content Pane" by default and can be moved to any other pane.

**Security Roles:** Security Roles control user access to view and edit pages and modules on the site. Each user can belong to one or more Security Roles. Each new site begins with two security roles – Administrator and Registered Users. The Administrator is then able to add new security roles according to their needs.

**Page:** A page is a webpage on your site. Typically, more than one page is added and each page holds modules, which contain the content for your site. Examples of commonly used pages are: Home, Products, Contact Us, and About Us.

**Visitor:** Any person who visits a page on your site.

**User:** A user is any person who has an account on your site.

**Vendor:** A vendor is a person or company who has been given advertising rights on your site.

## Section 4: Common Tasks

This section highlights some of the most basic tasks that you can accomplish with the system.



### Create a Page

A page is a webpage on your site. Typically, more than one page is added and each page holds modules, which contain the content for your site. Examples of commonly used pages are: Home, Products, Contact Us, and About Us.

1. Click on the “New Page” button located in the top toolbar.
2. Edit General, Appearance, Schedule, Mobile, and Security options. See **Pages** for more information.
3. Click on the “Add” button to save the new page.

### Add Module

1. Navigate to an existing page to add module content. (To add a new page, see **Add Page**.)
2. Select a module name from the module toolbox dropdown list.



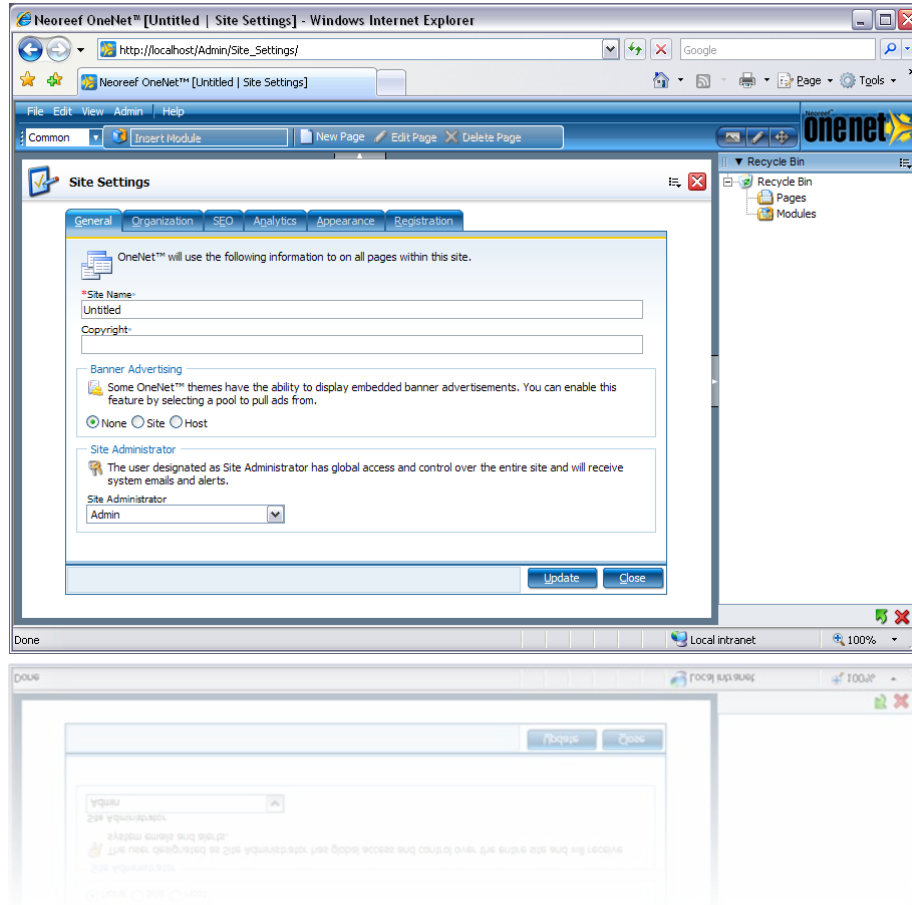
3. Configure module settings. (For more information see **Modules**.)
4. Click on the “Update” button to complete adding module.

### Administrator Tools

The Admin toolbar permits administrators to configure the site settings, organize and edit pages, manage users, security roles, vendor accounts, and files, as well as send bulk email. The admin toolbar is accessible only to users added to the Administrator Security role.

## Section 5: Site Settings

Site Settings dialog represents the local options for your site. Local settings allow you to customize your site to meet your business requirements.



### General

- **Site Name:** This title will be displayed in the Browser title bar.
- **Copyright:** This text will be displayed in the footer on each page within the site.
- **Banner Advertising:** Select from the following banner advertising options:
  - Site level banners will use your configured vendors for banner advertising.
  - Host level banners will use the Neoreef™ vendors list for banner advertising.
- **Site Administrator:** Select the name of the primary Administrator for the site from the dropdown list. Other users can be given administrator access, but this user is the main site administrator. This user will receive all system generated emails.

### Organization

- **Organization Name:** This is the organization name you would like to be used when the system merges your information with template content.
- **Mailing Address:** This is the address you would like to be used when the system merges your information with template content.

### SEO (Search Engine Optimization)

- **Description:** Enter a description for the site. Search engines will use this description when displaying this site in search results.
- **Keywords:** Enter key words for the site, separated by semicolons. These words will be used by search engines to categorize the site.

### Analytics

Enable Google Analytics by entering your Account ID provided by Google.

### Appearance

The appearance settings configure the overall look and feel of the site.

- **Site Logo:** Specify a logo for the header of the site by selecting from the browse dialog.
- **Site Icon:** Some browsers support the display of a custom icon that is associated with web pages and bookmarks. To create an icon for this site, select a file to convert. This file will be converted to 16 pixel x 16 pixel icon.
- **Theme:** Select a theme for the site from the Theme list.
- **Style Sheet:** The site style sheet allows global changes to fonts, colors and other CSS based elements.

### Registration

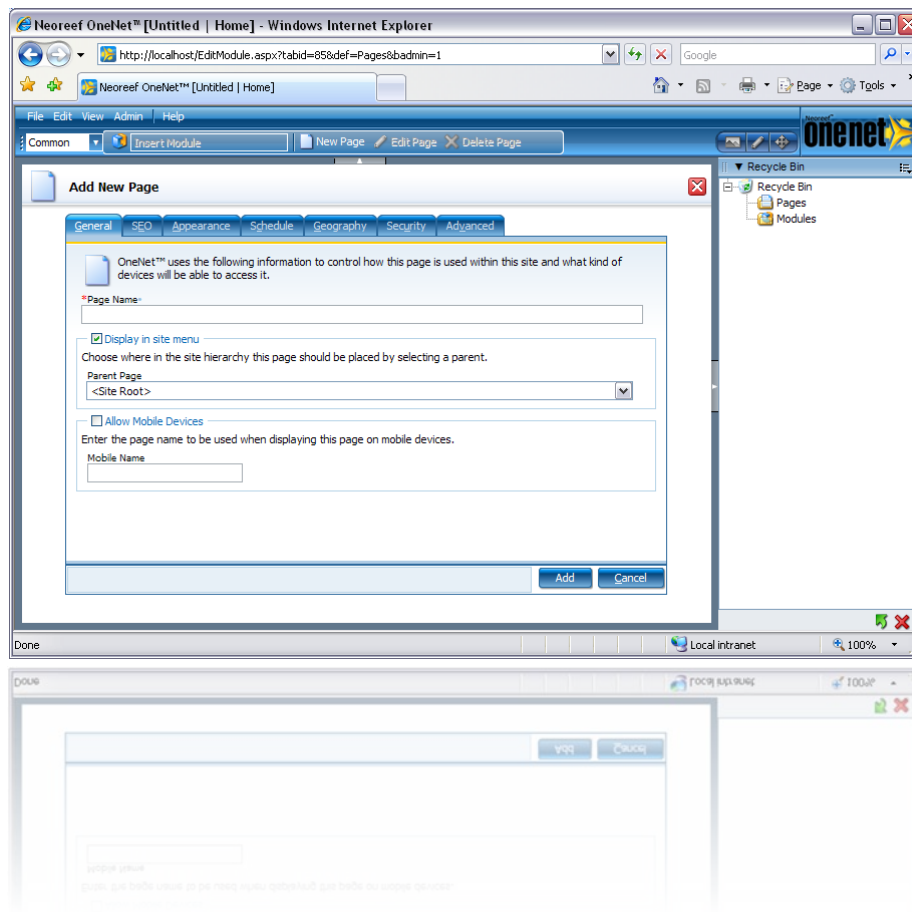
- **Registration Model:** The user registration model controls if and how users register on this site. Private allows registration but not access until authorized by an administrator, public allows immediate access and verified emails a confirmation code required to gain access.
  - **None:** Select this option to disable visitor registration.
  - **Private:** Visitors are able to register, but are not given Registered Users security privileges until the site administrator authorizes the user. The administrator receives an email notification upon each new registration upon sign up.
  - **Public:** Visitors are able to register and are given immediate Registered Users security privileges.
  - **Verified:** Visitors are able to register on the site, and are given Registered Users security privileges once their email address is verified. To verify their email address, they must enter a verification code the first time they log in. This verification code is emailed to the new user upon registration.
- **Redirects:** You can control the page that users are sent to after login, registration, and logging out.
- **Login Message:** This message will be appear in the login section of the login page.
- **Register Message:** This message will be appear in the registration section of the login page.
- **Registration Message:** This message will be appear at the top of the registration page.
- **New User Message:** This message will be inserted into new user authorization, verification, & registration emails.

## Section 6: Pages

A page is a webpage on your site. Typically, more than one page is added and each page holds modules, which contain the content for your site. Examples of commonly used pages are: Home, Products, Contact Us, and About Us.

### Creating Pages

1. Click on the “New Page” button located in the Admin Toolbar.
2. Or on the admin menu, click the Admin menu, and then click Pages. Click on the new page button.



### General

OneNet™ uses the following information to control how this page is used within this site and what kind of devices will be able to access it.

- **Page Name:** Enter/Edit the page name. This will be the displayed name for the tab.
- **Display in site menu:** Choose whether the page should be displayed in site menus.
  - **Parent Page:** Choose where in the site hierarchy this page should be placed by selecting a parent. Selecting <Site Root> will add the page to the top level of the menu.

- **Allow Mobile Devices:** Choose whether the page should be displayed to mobile devices.
  - **Mobile Name:** Enter the page name to be used when displaying this page on mobile devices.

### SEO (Search Engine Optimization)

Search engines will use the meta information to help classify and describe this web page. You should provide a one or two line description and a comma separated list of relevant keywords found within this page.

- **Page Title:** Enter a descriptive title for the page.
- **Description:** Enter a description for the page. This description will be used by search engines when displaying the page in the search results.
- **Key Words:** Enter key words for the page, separated by semicolons. These words will be used by search engines to categorize the page.

### Appearance

Appearance can be modified for each page within the site. Changing these settings will override the site appearance settings for the selected page only. By selecting an icon, theme and adjusting pane widths you can customize how this page will look and be presented within menus.

- **Menu Icon:** Specify an icon to display to left of the page name.
- **Page Theme:** Select a theme for the page from the theme list.
- **Pane Widths:** Enter a value in pixels or a percentage for the pane width.


### Schedule

Pages can be scheduled to be displayed between dates and times, or in accordance with a recurring pattern.

- **Display Time:** Select a Display Time for start and ending times that the page will be displayed.
- **Recurrence Pattern:** Select a Recurrence Pattern to specify which days of the week the page is displayed.
- **Range of Recurrence:** Select a Range of Recurrence to specify a start and end date.

### Geography

By creating geographic rules you can grant or deny access to a page based on where in the world users are located.

- **Rule Type:** Select the type of area (Country, Region, City, Postal Code, DMA code, or Telephone Area Code) and click "Add Rule".
- **Allow or Deny:** Choose whether you would like to allow or deny this area.
- **Access to X:** Select the entity and click save [].

## Security

By using security roles you can grant access and edit privileges to a page. Users granted access will be able to view a page, while those granted edit privileges can add and remove content.

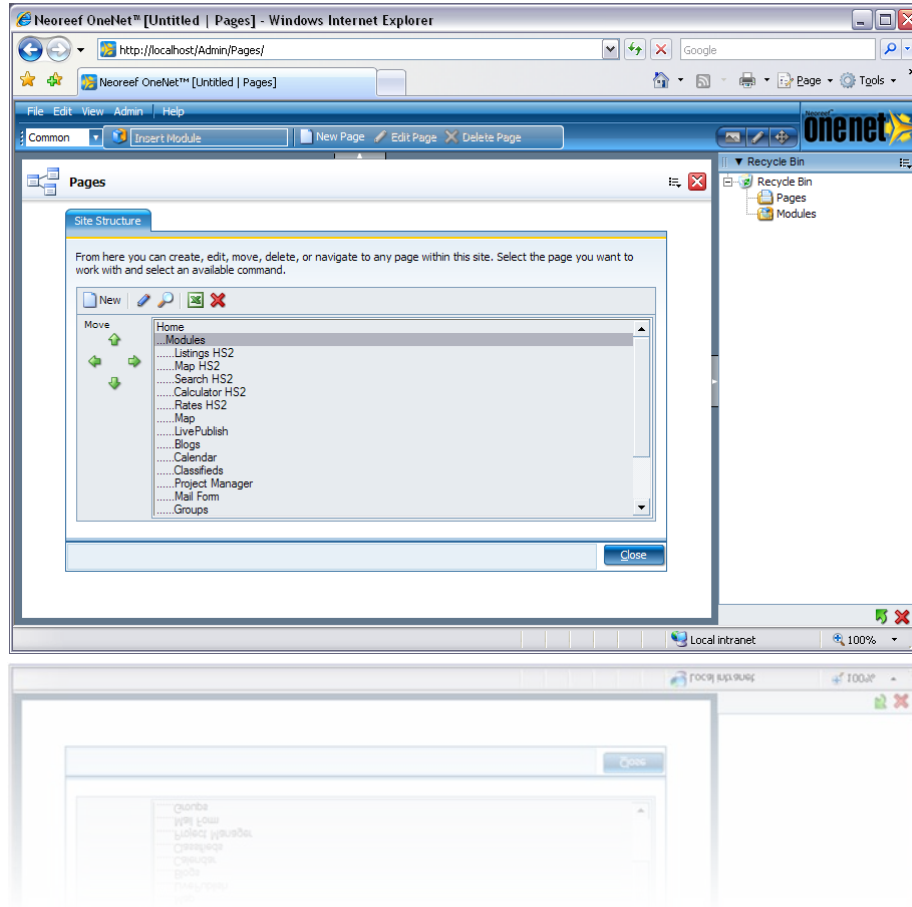
- **Authorized Access Roles:** Users that belong to the roles selected will be authorized to view a page while other users will not.
- **Authorized Edit Roles:** Users that belong to the roles selected will be authorized to edit the settings and content of a page.








## Advanced

- **Url Mapping:** Url mapping enables a page to respond to an alternate web address under a domain. This is useful for site migration or friendly promotional url's. (i.e. "/MyOldWebPage.htm" or "/JuneSpecials")
- **Secure Sockets Layer:** Secure Sockets Layer (SSL) forces a page to be transferred over secure 128bit encrypted connection. This will cause a secure lock icon to appear in the user's browser and the url to be prefixed with an "https://".

## Section 7: Site Structure

The Pages dialog offers direct access to every page on the site and allows for management of page order, hierarchy and settings.

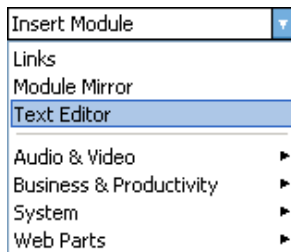


- **New:** Creates a new page
- **Edit** [  ]: Edits the settings for the selected page.
- **View** [  ]: View the selected page.
- **Delete** [  ]: Send the selected page to the recycle bin.
- **Page Order:**
  1. Select a page and click on one of the arrow buttons to move the page within the menu structure:
    - a. **Left** [  ]: Moves a page up one level in the hierarchy.
    - b. **Right** [  ]: Moves a page down one level in the hierarchy.
    - c. **Up** [  ]: Moves a page forward one position in the page order.
    - d. **Down** [  ]: Moves a page back one position in the page order.

## Section 8: Modules

Modules are the building blocks that permit the Administrator to add content to the site. Each module is designed to manage a common type of online content such as text, a list of FAQ's, a calendar of events, or a list of downloadable documents to name a few.

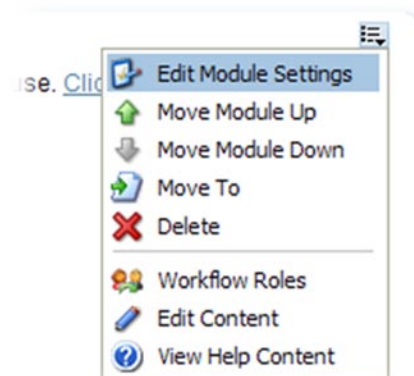
1. Navigate to an existing page where the module is to be added. (To add a new page, see **Pages**.)
2. Select the module type from the "Insert Module" menu. This will insert the module into the Content Pane.



3. Most modules require configuration. If prompted, follow the instructions to configure the module.

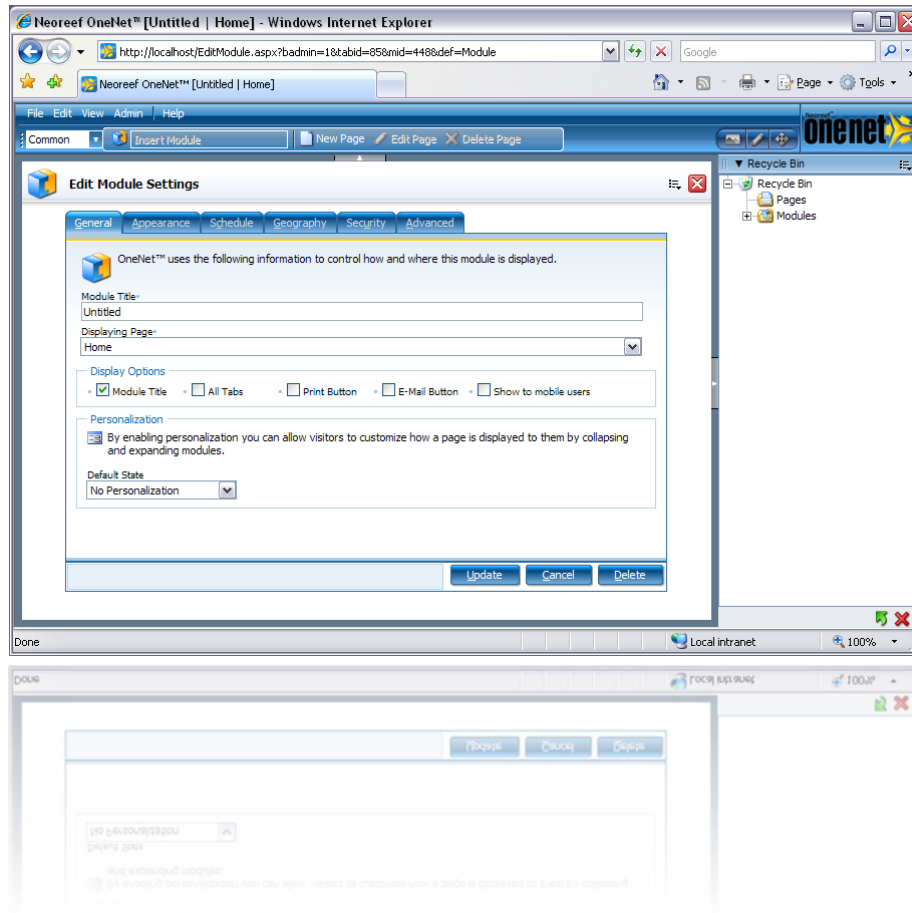


4. Edit the module's settings to edit the title and to adjust any other settings (See **Module Settings**).



## Module Settings

Every module has a variety of common settings that can be configured to control everything from appearance and functionality, to who can access and edit the content of the module.



## General

OneNet™ uses the following information to control how and where this module is displayed.

- **Module Title:** This text will be displayed in the title area of the selected module theme.
- **Displaying Page:** The page on which the module will be displayed. Select other pages to move the module.
- **Display Options**
  - **Module Title:** Display the title portion of the selected module theme.
  - **All Pages:** Display the module on all pages within the site.
  - **Print Button:** Enable a print button that allows visitors to print the content of the module in a printer friendly format.
  - **E-Mail Button:** Enable an E-Mail button that allows visitors to E-Mail the content displayed in the module.
  - **Show to mobile users:** If the module is placed on a mobile configured page you can select this option to display the module.

- **Personalization:** By enabling personalization you can allow visitors to customize how a page is displayed to them by collapsing and expanding modules.

### Appearance

Appearance can be modified for each module within the site.

- **Title Icon:** Specify an icon to display to the left of the module name.
- **Module Theme:** Select a theme for the module from the theme list.
- **Container Settings:** Enter alignment, color and border settings or edit the HTML surrounding the module.


### Schedule

Modules can be scheduled to be displayed between dates and times, or in accordance with a recurring pattern.

- **Display Time:** Select a Display Time for start and ending times that the module will be displayed.
- **Recurrence Pattern:** Select a Recurrence Pattern to specify which days of the week the module is displayed.
- **Range of Recurrence:** Select a Range of Recurrence to specify a start and end date.

### Geography

By creating geographic rules you can grant or deny access to a module based on where in the world users are located.

- **Rule Type:** Select the type of area (Country, Region, City, Postal Code, DMA code, or Telephone Area Code) and click “add rule”.
- **Allow or Deny:** Choose whether you would like to allow or deny this area.
- **Access to X:** Select the entity and click the save [  ].

### Security

By using security roles you can grant access and edit privileges to a module. Users granted access will be able to view a module, while those granted edit privileges can change the content of the module.

- **Authorized Access Roles:** Users that belong to the roles selected will be authorized to view a module while other users will not.
- **Authorized Edit Roles:** Users that belong to the roles selected will be authorized to edit the settings and content of a module.

### Advanced

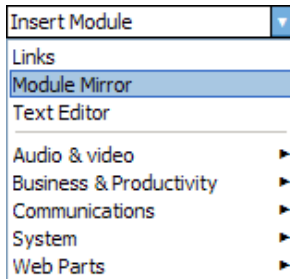
Module caching is used to speed up your pages by only generating dynamic content at scheduled intervals. If the content the module displays is relatively static set a longer interval than if it is more dynamic.

## Basic Modules

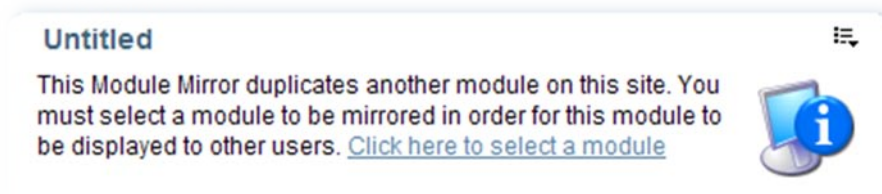
### Module Mirror

This module makes a replicated instance of another module within the site. The mirror module is simply a view of the original module. All changes made to the mirror module are made by editing the original module.

1. Insert a module mirror onto the page by selecting “Module Mirror” from the “Insert Module” menu.



2. Configure the module by clicking the “Click here to select a module” link.



3. Select the existing module to mirror from the list.
4. Click “Copy Module Title” to set the title of the mirror to that of the original module. If left unchecked, the title will be whatever is specified in the module mirror’s module settings.
5. Click the “Update” button to save changes.

### Edit Source Module

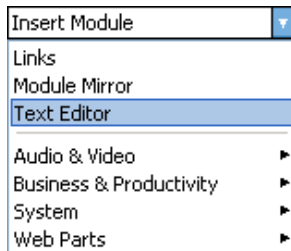
Changes made to the mirrored module are done at the original module.

1. To edit the source module, click on the submenu [≡] on the top right of the module.
2. Click “Edit Source Module” [✎].
3. The page will be redirected and scrolled to the original module. From here changes to the original module can be made.
4. To view the changes in the mirrored module, navigate to the page containing the mirror.

## Text Editor

This module renders full HTML editor/word processor for entering text, images, and other content into a page.

1. Insert a Text Editor onto the page by selecting “Text Editor” from the “Insert Module” menu.



2. Configure the module by clicking the “Click here to configure” link.



3. Select users who can author content, and users who can edit and approve content.
4. Click on the "Next" button at the bottom of the page.
5. Enter text in the editor provided.
6. Enter formatting changes as needed.
7. To edit/view the html source, click on the source button in the tool bar.
8. To enter text for mobile users, click on the Mobile tab and enter text in the textboxes provided.
9. To save as a working draft, but not publish, click on the "Save" button.
10. To save the text and publish it to the site, click on the "Publish" button.

## Edit Text

1. Click on the on the submenu [≡] on the top right of the module.
2. Click “Edit Content” [✎].
3. Enter text in the editor provided.
4. Enter formatting changes as needed.
5. To edit/view the html source, click on the source button in the tool bar.
6. To enter text for mobile users, click on the Mobile tab and enter text in the textboxes provided.
7. To save as a working draft, but not publish, click on the "Save" button.
8. To save the text and publish it to the site, click on the "Publish" button.

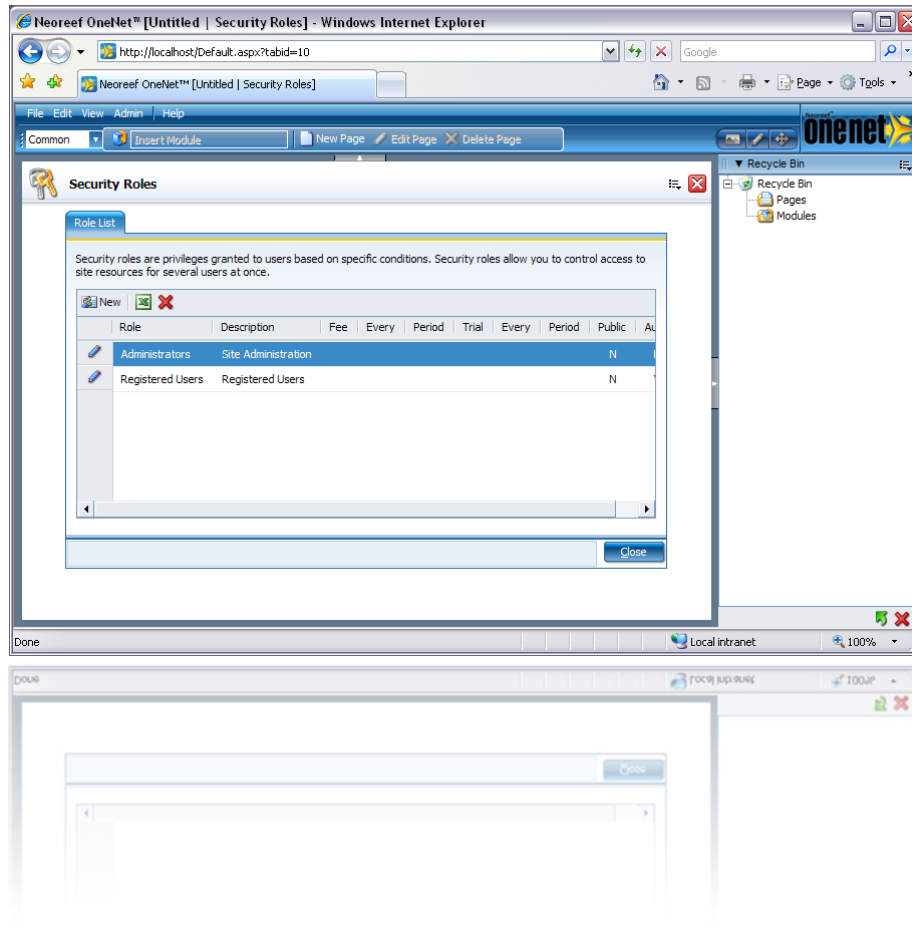
## Versions

Once a new text entry has been published, the text editor saves a draft of the old version. The module allows you to revert to previous versions if needed.

1. Click on the on the submenu [☰] on the top right of the module.
2. Click "Edit Content" [✎].
3. Click on the "Versions" tab.
4. Find the older version to revert to by clicking on the "View" links. Click on the "Reuse" [↶] button.
5. Edit text as needed and click on the "Publish" button.

## Section 9: Security Roles

Security Roles control which pages and modules site users are permitted to view and/or edit.



### System Roles

The following security roles are configured by default for the site:

- **Administrators:** This role permits full page access to add, edit, and delete all pages and modules. This role also gives full access to the admin toolbar.
- **Registered Users:** This role permits page and/or module access to registered users. This role requires users to be logged in to the site.

### Pseudo Roles

The following roles are not technically roles, but more an aggregate state of being.

- **All Users:** This role is displayed on the page and module settings tabs but not on the “Security Roles” dialog. This role permits page and/or module access to all users. This role does not require users to be logged in or registered on the site.
- **Unauthenticated Users:** This role is displayed on the page and module settings tabs but not on the “Security Roles” dialog. Modules and page checked for this role only are

displayed only to users that are not logged in to the site. Once a user is logged in, they become an Authenticated User and the pages and/or modules checked for Unauthenticated Users are no longer displayed.

## Adding a Role

Click on the “New” button at the top of the dialog.


### General

- **Role Name:** Enter a name for the Security Role.
- **Description:** Enter a brief description for the Security Role.
- **Auto Assign:** Check the “Auto Assign” checkbox to automatically assign all users to this role.
- **Public:** Check the “Public” role checkbox if all users are able to view the details of this role and sign up for this role. Public roles will be displayed as a member’s service.

### eCommerce

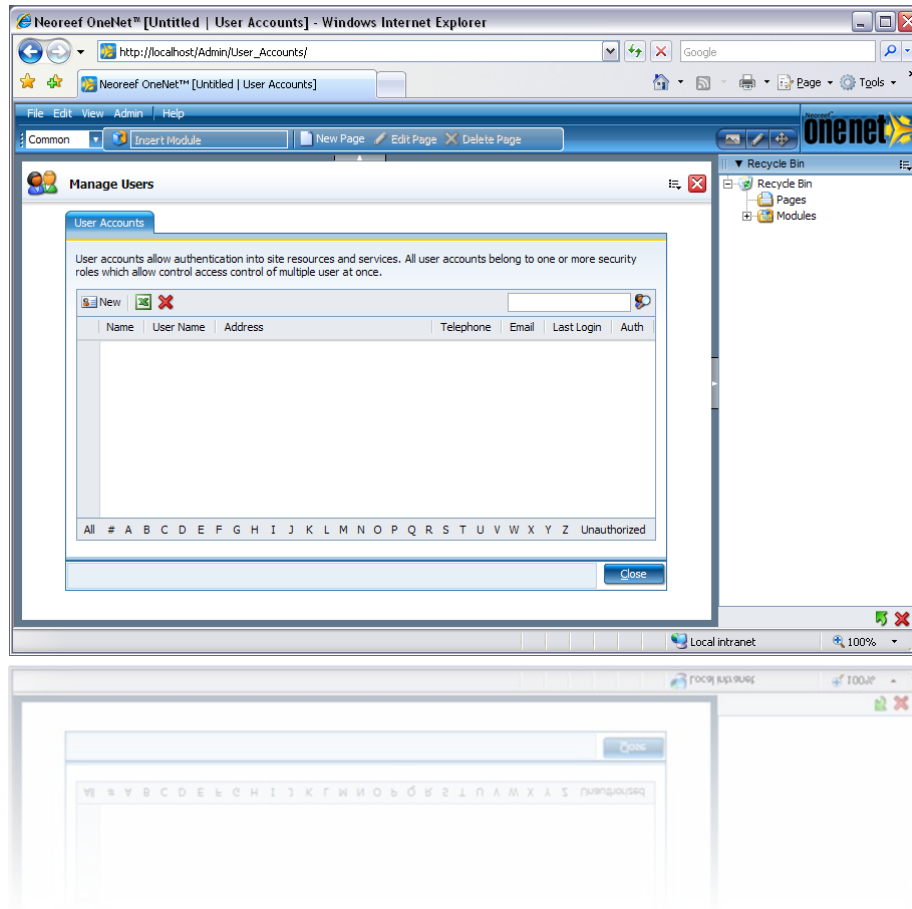
- **Service Fee:** Enter a service fee to charge members who belong to this security role. If no fees are charged, leave this field blank.
- **Trial Period:** Enter a number for the billing period for this role. If no fee is charged, but access to the role will expire on a given day, complete this field as this sets the access period for the role. If access to the role does not have a fee and does not expire.

## Adding Users to a Role

1. Click the pencil [  ] next to the security role to enter the edit mode.
2. Click the “Manage Users” button.
3. Locate the required user in the users list, optionally select an expiration date if desired, and then click on the “Add” button

## Section 10: User Accounts


This module manages the user account information for the site. Administrators are able to add, edit, or delete users as well as authorize their accounts.




### Create Users

1. Click “New” to create a new user.
2. Fill out the account and address fields for the user.
3. Optionally, uncheck the “User Authorized” checkbox to disable the account.
4. Select the checkboxes to the right of fields to make them required fields.
5. Click on the “Add” button to add the user.

### Edit/Delete Users

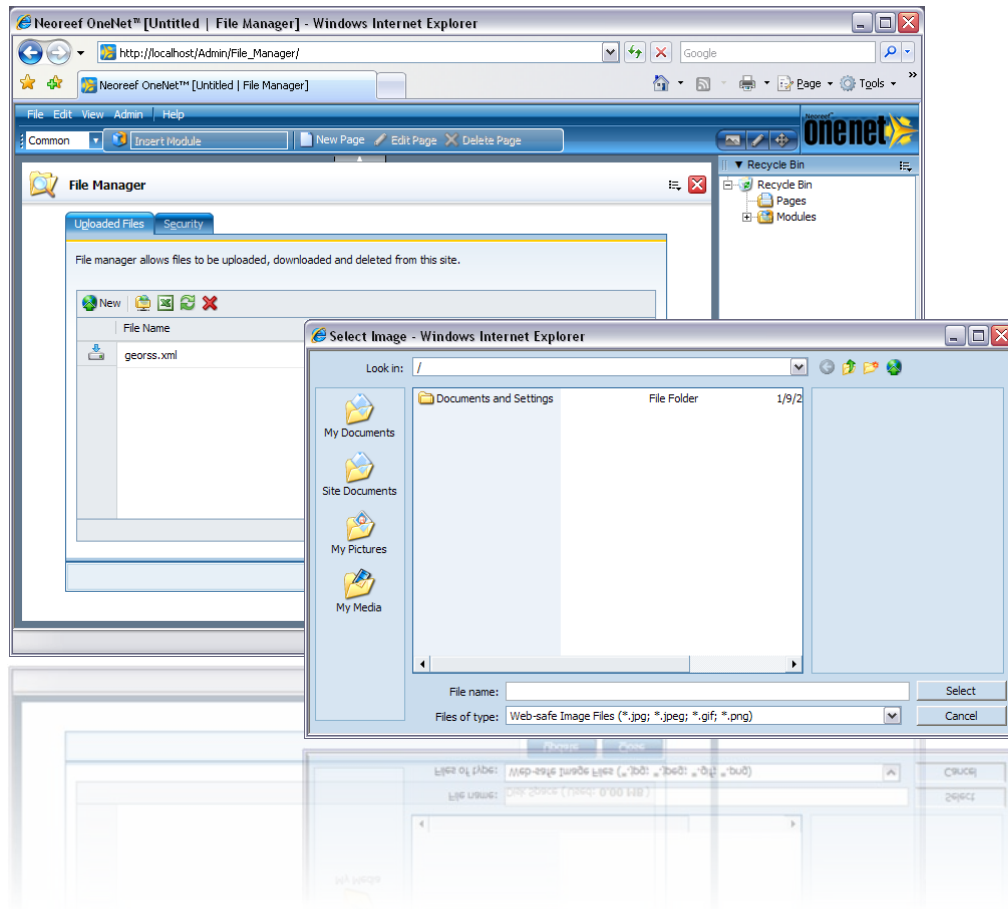
1. Locate the user by using alpha-select or search.
2. Click the edit [  ] icon next to the users name.
3. Edit the account and address fields for the user.
4. Optionally, click on the “Delete” button to delete the user.
5. Click on the “Update” button to save changes.

### Authorize Users

1. Locate the user by using alpha-select, search, or select view all unauthorized users.
2. Click on the “Unauthorized” link.
3. Click the edit [  ] icon next to the users name.
4. Check/Uncheck the Authorized checkbox to authorize/unauthorized the user.
5. Click on the “Update” button to save changes.

## Section 11: File Management

The File Manager dialog and File Browser are used to manage files on the site. Administrators are able to upload, download, and delete files. Details of available and used disk space are also displayed in the main File Manager dialog.



### Naming Images


When naming images; use only alpha-numeric characters. These can be either upper or lower case. You can also use an underscore ( \_ ), hyphen ( - ), or add a space between characters.

### Uploading Files

*File Manager*


1. Click "New".
2. Click on the "Browse" button to search your computer for the file to be uploaded.
3. Click on the "Add" button.
4. Continue steps 3-4 until finished adding files to be uploaded.
5. Click on the "Upload" button.

### *File Browser*

1. Click the Upload [] Button
2. Optionally, check “Overwrite existing files” if replacing files with the same name.
3. Click on the “Browse” button to search your computer for the file to be uploaded.
4. Repeat step 2 for additional files.
5. Click on the “Upload” button.

## Deleting Files

### *File Manager*

- Select the desired file to delete and click on the delete [] button.

### *File Browser*

- Select the desired file or folder to delete and press the “Delete” key on your keyboard.

## Downloading Files

### *File Manager*

1. Click on the “Download” button located beside the file to be downloaded.
2. Select “Save” to save the file and follow the prompts.

*\*Note: Downloading the file does not delete it from the File Manager.*

## Set File Security

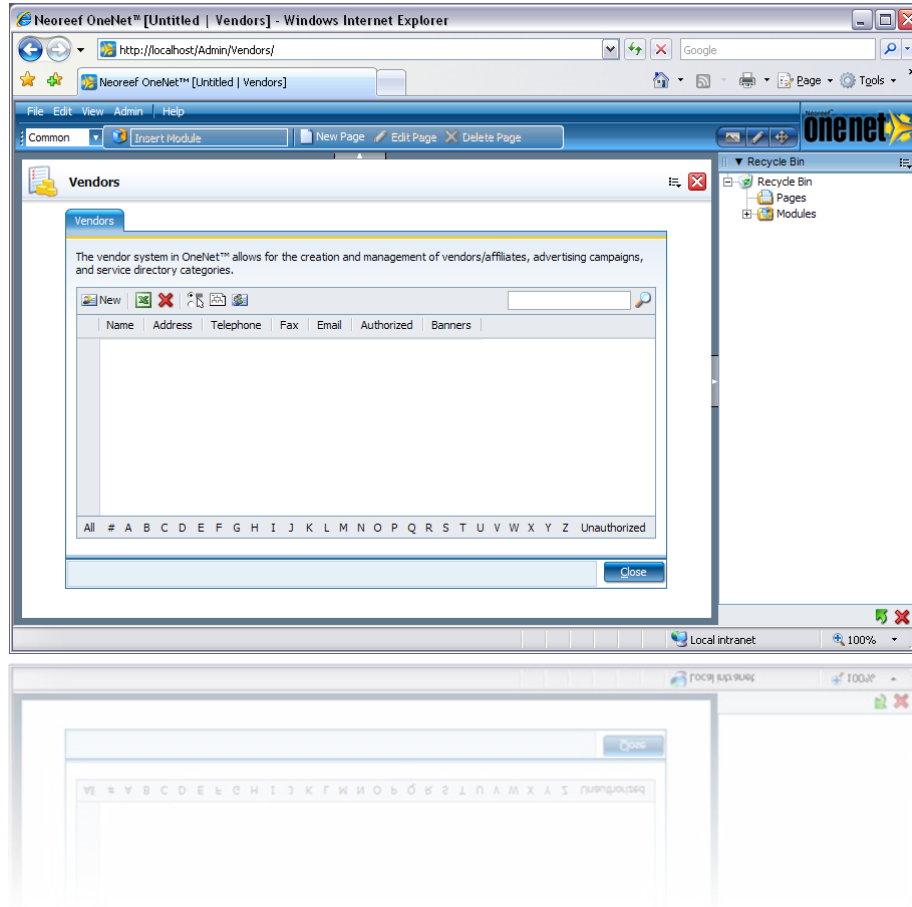
Security roles can be granted file upload privileges. This will allow for posting of files and images.

### *File Manager*

Users that belong to the roles selected will be authorized to upload files while other users will not.

## Section 12: Vendors


This dialog enables the Administrator to add, modify, and delete vendors. Vendor related modules are configured through the Vendors dialog.



### Adding Vendors


1. Click “New” to create a new vendor.
2. Fill out the account and address fields for the vendor.
3. Optionally, select a logo from the Vendor from the file browser.
4. Optionally, check the “Publish in Directory” checkbox to list this vendor in the service directory.
5. Enter the applicable key search words for the vendor separated by commas. These search words will be used in the Service Directory module.
6. Click on the “Add” button to add the vendor.

### Edit/Delete Vendors

1. Click on the letter that corresponds to the first letter of the name of the vendor, or select the "All" link to view all vendors.
2. Click the edit [  ] icon next to the vendors name.

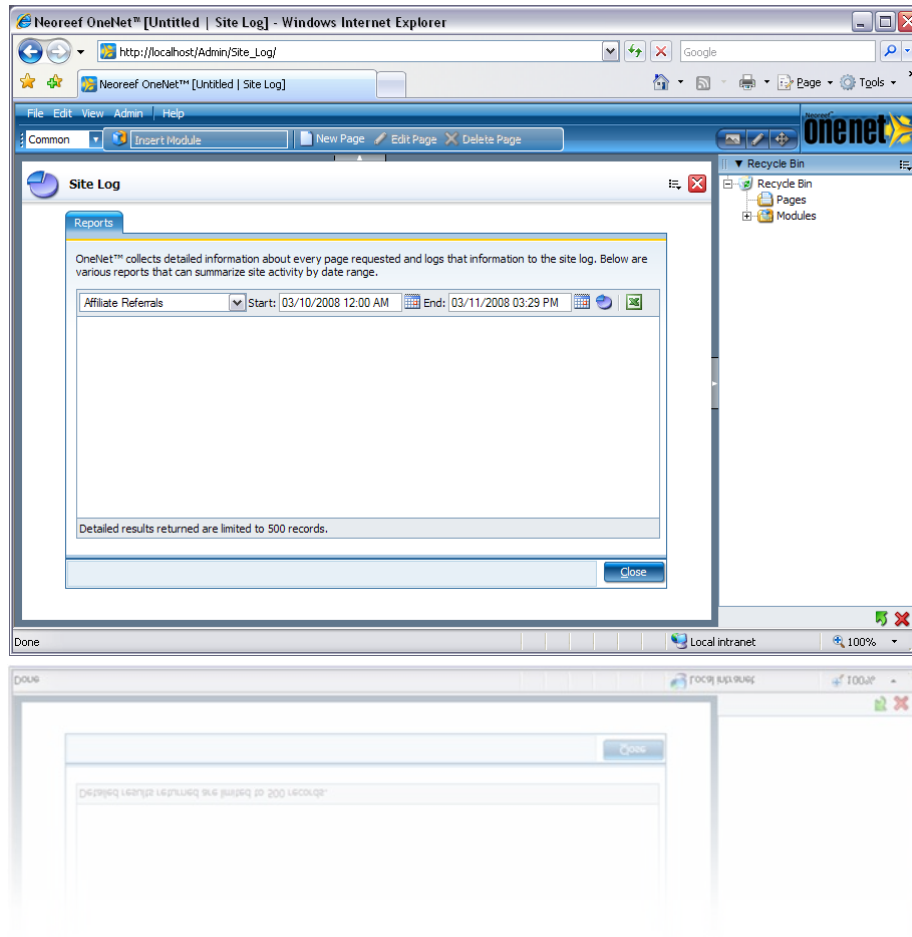
3. Edit the account and address fields for the vendor.
4. Optionally, click on the “Delete” button to delete the vendor.
5. Click on the “Update” button to save changes.

### Authorize Vendors

1. Click on the letter that corresponds to the first letter of the name of the vendor, or select “All” to view all vendors. Optionally, click on the “Unauthorized” link to view all unauthorized vendors.
2. Locate Click the edit [  ] icon next to the vendors name.
3. Check the “Publish in Directory” checkbox to enable this Vendor to be listed in the Service Directory module.
4. Click on the “Update” button to save changes.

## Section 13: Site Log

This dialog provides valuable site log data about visitors, site usage, membership, and volumes.

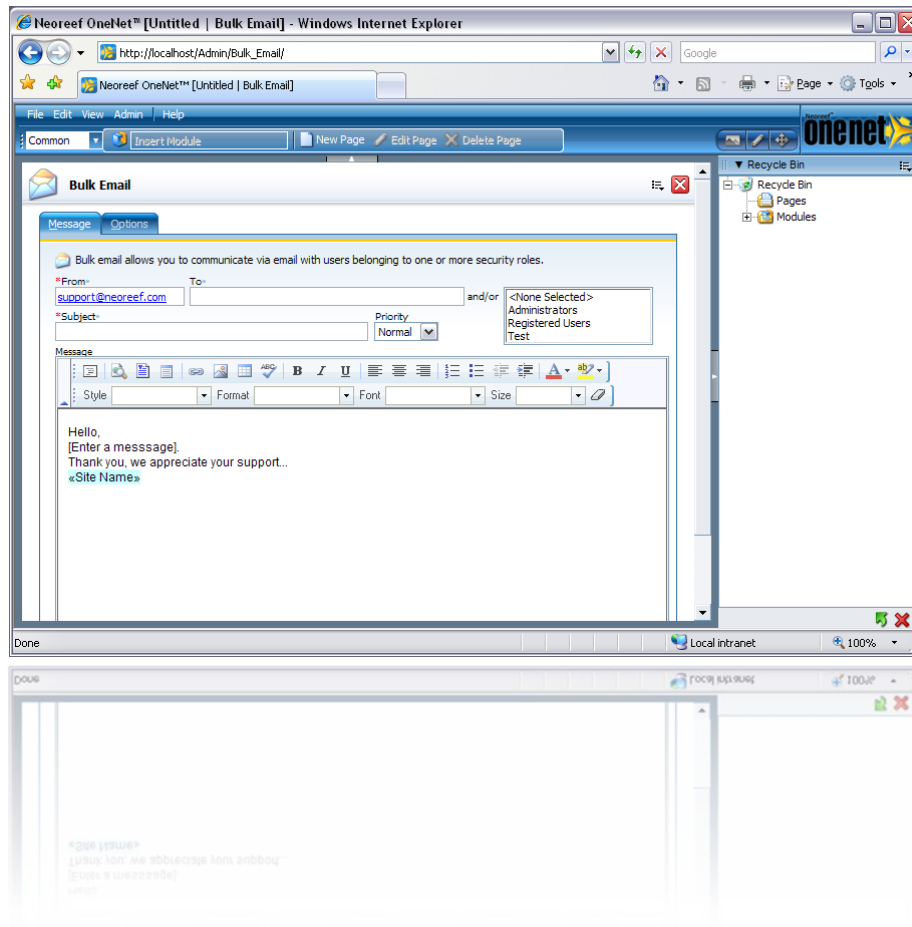


### View Log Report

1. Select a report type from the dropdown list.
2. Select the start and end dates/times for the report.
3. Click the “Display” [🔍] button to view the report.

## Section 14: Bulk Email

This dialog allows Administrators to send bulk email to all users belonging to a particular Security Role or a list of email addresses. Emails are sent to each user separately, without revealing other users email addresses.



### Send Email

1. At "To", enter the recipient's email address or select a group from the Send To Group dropdown list.
2. At "Subject", enter the subject of the email.
3. Enter email body in the editor provided.
4. Change formatting as desired.
5. Click on the Options tab to add attachments to the message.
6. Click on the "Send" button to send the email to recipients.