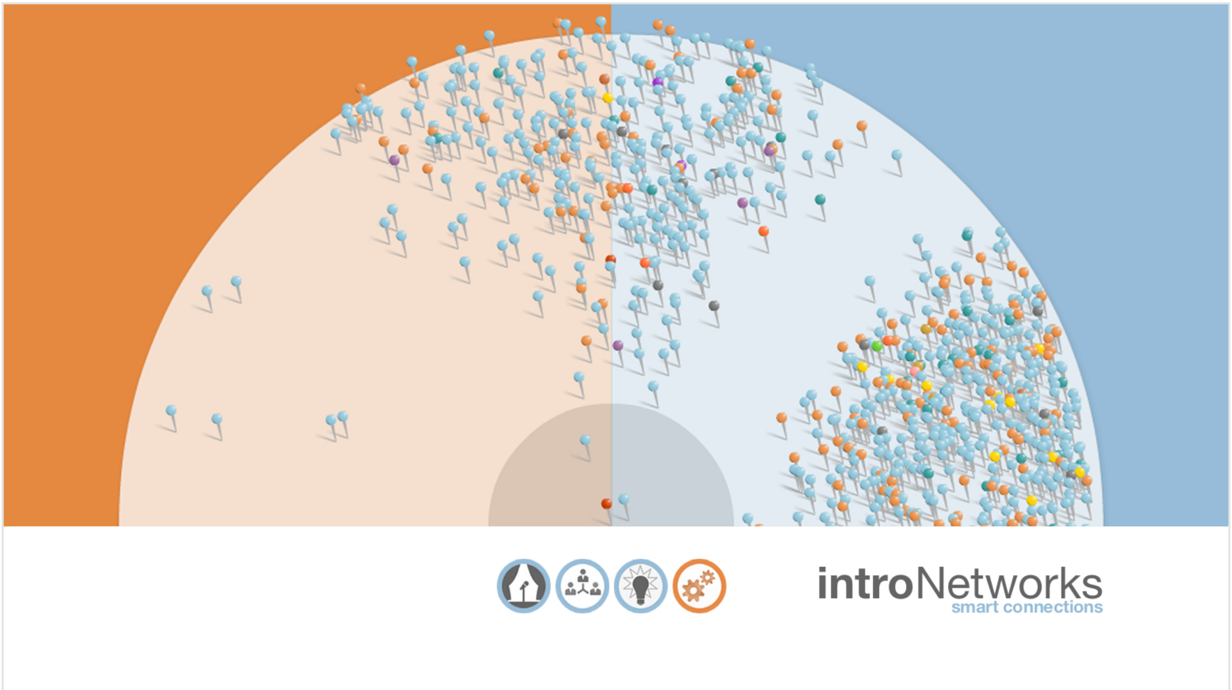

introNetworks Administrator Guide

About MANAGE Help

This document details how to work in System Administrator mode. For complete information on working as a user, refer to the USE online documentation found under the Help link on the site.

Log in as System Administrator

As System Administrator, you can manage all aspects of your introNetworks community including:

- user profiles
- dashboard news and user acceptance text
- specialized interest groups
- calendars
- informational resources
- forum discussions
- system reports
- on-screen marketplace ads

In addition to functioning as System Administrator, you can also maintain your own user profile, emails, and matches.

To manage your introNetworks system, you must be in System Administrator mode. After you log in, click the **Role** button on the top right of dashboard and select **Administrator**.

In addition to the standard user menus, you will see the following:

- Accordion menu for **Manage**
- **Manage News** and **Edit** buttons
- **Manage User Acceptance** and **Edit** buttons

Dashboard

The **Dashboard / Profile** accordion menu opens by default when you log into your introNetworks system.

The **Role** pull-down button appears in the upper right corner. Use this to switch between **User** and **Administrator** mode.

By default, the **News** window displays; you can use this to provide announcements and web links for your users. If it is not displayed, click **Manage News**. Click **Edit** to enter or edit information for the News window. Toggle to **Manage User Acceptance** to edit the optional user statement for your users.

Edit News or User Acceptance

The **News** window is displayed whenever a returning user logs into the introNetworks system and is used in the dashboard email digest (optional feature). Typically, it provides information and links for your users. To enter or edit information the News window, toggle on the **Manage News** button on the upper-right corner of the dashboard.

A default **User Acceptance** statement is included with your introNetworks system. If configured for your site, the User Acceptance message displays when a user logs on for the first time. It provides the terms and conditions for your introNetworks system; the user will be directed to read and click **I Agree** in order to become a user. To edit or create a new statement, toggle on the **Manage User Acceptance** button at the top of the dashboard.

Click to select what you want to edit. Click the **Edit** button. The News or User Acceptance window opens.

Type directly into the **News** or **User Acceptance** textbox. Use the formatting buttons below the textbox to select fonts, styles, sizes, and colors. You can also use buttons to format and align the text.

You can enter a clickable link in the window. In the news textbox, type the text you want the user to click to access the link. Highlight the text with the mouse; the http:// textbox becomes active. Enter the URL for the website link in the http:// textbox.

When the user moves the mouse over this text, the cursor will change to a hand; when the user clicks on it, the website specified in the http:// textbox will open in a new window. You may want to format the text for the clickable link so it appears underlined and/or a different color; this is a simple way to let the user know it is a hypertext link.

When you have completed your edits, click **Save** to retain your changes.

Accordion Menus

The panel to the left of the screen displays additional accordion menus below the Dashboard / Profile menu.

- Use **Connections / Search** to generate users lists; you can export lists to CSV files.
- Use **Groups** to create specialized interest group categories for your introNetworks community; you can also create public, private, and restricted groups.
- Use **Message Center / Contacts** to send and receive emails from matches and to manage contact lists and blacklists.
- Use **Calendar** to create various calendars for your users including global, pin specific, and group specific.
- Use **Resources** to create categories for sharing URL links, files, photos, and RSS feeds with the community.
- Use **Forums** to create Forums for users to read and respond to posts on various topics.
- Use **Manage** to generate system reports to create and manage your on-screen ads.

User Profiles

As System Administrator, you can:

- Add a user profile
- Edit an existing user profile
- Add or edit email notification settings for a user profile
- Add or invite a user to a Group

Access these functions from List View. Click the **Connections / Search** accordion menu on the side panel and toggle to **List View**. Change your search parameters as needed to include existing users in the list.

You can also open List View by clicking the **Show My Connections** button from your profile**.**

Although you can toggle to **Pin View**, when you are in Administrator role, we recommend always working in **List View** as is it much easier to access users from the list.

To read a profile, click on the user name; his introCard is displayed.

Add a Single User

To add a new user profile, go to List View and click **Add Profile**.

To create the new profile, you must complete the mandatory fields on the Contact Information page. The required fields are **Username, Last Name**, **Password**, and **Email**. Typically, you only complete only these fields; the user completes the rest of the pages. However, you can enter data for the user on any or all pages of the profile.

In addition to the basic user information, you must also specify the **Role** for the user. The default is **User**; you can also select:

- **Guest –** to give a temporary user limited access to your introNetworks system; a Guest can view functions but cannot post messages, comments, or resources and create groups.
- **Manager –** to specify a user as a site manager; a Manager can manage users, access the Manage accordion but cannot create new categories for resources, forums or make new calendars. You can have multiple System Managers.
- **Administrator –** to give a user complete authority to manage the introNetworks system; you can have multiple System Administrators.

Edit or Delete an Existing User

To edit a user profile, display the user name in List View. Click the green arrow icon for the user.

The Contact Information page opens. All fields are editable; you can change any information that the user entered. You can also specify the **Role** for user; from the pull-down menu, select **Guest**, **User, Manager**, or **Administrator**. If you want the user to see the User Acceptance message when he logs in, click the checkbox for **Show User Acceptance**.

You can also edit the **Tags**, **More Details**, and **My Media** pages. Click **Notifications Settings** if you want to edit the user's email addresses and notification settings.

Click **Save** to retain your changes.

To delete a profile, click the red **X** icon for the user; you are prompted to confirm the deletion.

Add or invite a User to a Group

To add or invite a user to a Group, click on his checkbox in List View. To include multiple users, click on their checkboxes or click **Select All**.

Click the group pin icon at the bottom of the list. A dialog box opens. From the **Group** pull-down menu, select the group name. Click **Add** or **Invite** and then **Save**. You can assign multiple groups; however, you must select them one at a time.

Adding immediately puts the user in a group and sends an email notification to the person. When the user clicks **My Groups** in his Groups list, the group is displayed.

Inviting issues an email invitation to join the group. Users see the group introCard in their My Invitations list and are allowed to join or decline the invitation from the introCard.

Connections / Search

As System Administrator, you can generate a user list and then export it from List View to an Excel file. To create a list of specific users in the system, use Smart Search and then display the results in List View.

Note that you can also use the **Manage** menu to access default reports that you can export to Excel. The **User** reports offer of variety of options including **All Users** to generate a list of all your introNetworks users.

Export a User List

You can download a list of users to a CSV file from List View. Use the search parameters to generate the user list you want to export. Click **Select All** or click the checkboxes for the users you want to include in this report. Click the Excel icon at the bottom of list. A file browser opens. Enter the file name and click **Save**.

The list is saved as a CSV file that you can open in Excel. The report has 25 fields detailing basic contact, password, and pin type information, as well as the number of logins and the last login date. You can sort and format this information in Excel as needed.

Groups

As System Administrator, you can create public, private, and restricted groups. You can also create group categories to organize the various groups in your system.

In addition to your role as System Administrator, there are three other roles within groups:

- **Group Administrator –** creates, edits, and deletes public groups.
- **Group Manager –** manages membership for a specific group. Typically, the System Administrator or Group Administrator creates a group and then assigns a member to function as Group Manager.
- **Member –** a participant in a group. Any user can join a public group or request an invitation to a private group.

Use the **Groups** accordion menu to create and manage groups and group categories.

Group Categories

By default, three categories are automatically included in your introNetworks system:

- **All Groups –** For users, this includes all public and private groups; for System Administrators, it also includes restricted groups.
- **My Groups –** For users, this includes only the groups in which they are members.
- **My Invitations –** For users, this includes only groups who have extended invitations that the user has not yet accepted or declined.

As the System Administrator, you can also create additional categories to help organize your groups. Below the Group Category list, click **Create…** to create a new group category. Enter the **Category Name** and click **OK**. The new category is added to the list.

To edit or delete a category you created, highlight it on the Group Category list. Click **Edit…**or **Delete….** Note that the category is deleted without confirmation.

Create a New Group

As the System Administrator, you can create public, private, or restricted groups.

- **Public –** Any introNetworks community user can view, join, or create a public group.
- **Private –** Only System Administrators can create a private group. Any users can view private groups but must submit a request to join. The System Administrator, its Group Administrator, or its Group Manager must approve the request.
- **Restricted –** Only the System Administrator can create a restricted group and add members. The System Administrator and its members can only view a restricted group.

To create a private or restricted group, from the **Groups** accordion menu click **Create Group**. On the Basic Information page, use the **Type** pull-down menu to specify **Private** or **Restricted**.

Manage Groups

As System Administrator you can manage groups, even if you did not create them. This includes adding, deleting, inviting, or approving members. You can also assign a group member to be manager of any public, private, or restricted group.

To access these functions, open the group introCard.

Assign a Manager

To help manage a group's members, you can assign a group member to be Group Manager. The Group Manager has the same authority as the Group Administrator with the exception of editing and deleting the group.

Click on the group to open its introCard. Click the Members tab. Highlight the user's name on the list. In the Role column, click on User to display a pull-down menu; change the setting to Manager.

Delete a Group

Only the Site Administrator or Group Administrator can delete a group. Click the Summary tab and then click Delete. You are prompted for confirmation before the group is deleted.

Manage Members

As Site Administrator you can invite, add and remove members to your group. Access these functions from the Members tab on your group introCard. Group

Administrator and Managers can only invite and remove members; they cannot add members to a group.

Invite or Add Members

Use the Members tab to add and invite users to your group. Adding immediately puts the users in your group and sends an email notification to the user according to his notification settings. When the new member clicks My Groups in his Groups list, the group is displayed.

Inviting issues an email invitation to join the group. Users see the group introCard in their My Invitations list.

Click the **Add** or **Invite** buttons at the bottom of the Members page. In the dialog box, use the search tool to generate a list of potential members. Enter all or part of a first name or last name, then click the search icon.

A list is displayed in the Possible Members box. Click a name to select it; you can also use Ctrl-click and Shift-click to select multiple names. To move the highlighted names to the Current Members box, click the **+** (plus) button; click + multiple times as names are added one at a time. To remove a name, highlight it and then click **–** (minus). Click and drag also works to move names between the lists.

When your list is complete, click Add Selected or Invite Selected. A sortable member list is displayed; the Action label indicates whether they have been added or invited to the group. Click on a heading to sort by it. Use the scroll bar to move up and down the list.

Remove Members

To remove members from your group, click the **Remove** button at the bottom of the Members page. The list of members is displayed. To specify the members to remove, click their checkboxes or the Select All button. Click **Remove** to delete the member from your group.

Note that there is no confirmation before delete; once you select a name and click the Remove button, the member is automatically deleted.

Requests

As Group Administrator or Group Manager of a private group, you will need to approve or decline membership requests. Use the Request tab to review a list of members who want to join your group. Click on any heading to sort by it.

You can Approve or Decline requests. To specify the members to approve or decline, click their checkboxes or the Select All button then click the appropriate button.

Invitations

Use the Invitations tab to review a list of users with outstanding invitations to join your group. Click on any heading to sort by it.

You can Re-invite or Remove users from consideration. To specify the users to re-invite or remove, click their checkboxes or the Select All button.

Calendar

Use the Calendar accordion menu to create various calendars for your users. You can set up the following types:

- **Global –** viewed by all users, typically includes events that pertain to the entire community. Site Administrators can add events to the Global
- **Pin** specific – can be viewed by only the specified pin type.
- **Group** specific – can be viewed only by members of the group.

Users cannot edit or add events to calendars you created as System Administrator. Users can create personal calendars to record their own schedules. If a user is a group manager, he can also create a group calendar.

When you click the **Calendar** button, the Calendar menu opens and a monthly calendar is displayed.

On the monthly calendar, the current day is shaded. You can scroll forward and backward through the months using the left and right arrow buttons at the top of the calendar. To return to the current month, click **Today**. To set the time for your calendar, click **Time Zone**. Select the appropriate coordinated universal time (UTC) setting from the pull-down menu.

Create Calendar

To create a new calendar, click **Create** on the Calendar menu. Enter a **Title** for your calendar. Specify the **Scope** for your calendar. Select **Global** if you want all users to see this calendar. For **Pin** and **Group**, select the pin type or group name from the **Allow** pull-down menu. Click **Save**. The calendar is added to the list.

To edit a calendar, highlight it in the Calendar list. Click **Edit**. You can change the name, scope, or allowed viewers.

To delete a calendar, highlight it in the Calendar list. Click **Delete**; you are prompted to confirm the deletion.

Add Event

To an add event to a calendar, click the **Add Event** button or double-click on a date to select it. When you select a date by double-clicking, it is lightly shaded.

The Create New Event box opens. For each event, you can enter the event name, the date range for multi-day events such as a conference or holiday closure, time range or all-day event flag, and location.

From the **Calendar** pull-down menu, select the calendar for this event. You can enter your event description with text formatting and website link.

Click **OK** to add the event to the calendar.

View Calendars

Calendar names and their color icons are displayed in the **Calendar** list. A checkmark icon indicates which calendars are displayed. Toggle the checkmark off or on for the calendars you want to view. You can display multiple calendars together.

Each type of calendar has a unique color; the event text uses its calendar color. For example, if the global calendar icon is red, all global events display in red text on the calendar.

On a calendar, all-day events appear as a solid bar with the event name. Hourly events list the starting time and the event name. Global events are always displayed with a box around the text. If an event name is truncated, hover the mouse over it to display the complete information.

To display the event details, double-click on an event name on the calendar.

Resources

A resource is a place to share URL links, files, photos, and RSS feeds that might be of interest to the community. Resources are organized into categories and typically cover a specific issue.

As System Administrator, you can add, edit, or delete resource categories. Group Administrators and Managers can also create and manage resource categories for the groups they create.

Use the **Resources** menu to access and create RSS feeds, photos, files, and links.

Create a Resource Category

To add a resource category, click **Add Category** from the Category table. The New Resource Category box opens. Enter a title.

You can enter a **Description** and format the text using the buttons above the textbox.

Click **Lock Category**, if you do not want users to add their resources to this group resource category. If you lock the category, users can view the resources, but cannot contribute to the category. If you create a locked category, you must add resources because no one else is authorized to add.

Specify the **Scope** for your resource category. Select **Global** if you want all users to see this resource category. To restrict the scope to **Pin** or **Group**, select the pin type or group name from the **Allow** pull-down menu. Click **Save**. The category is added to the Resource list.

As System Administrator, you can have control over all resource content regardless of the creator. To edit or delete a resource category, highlight it in the Resource list. Click **Edit**; click **Save** to retain your changes. Click **Delete**; you are prompted to confirm the deletion.

Add a Resource

After you create a resource category, you can add resource links, photos, files, or RSS feeds to share with the community.

In the Resource list, highlight the resource category to open it. Click the **Create** button at the bottom of the resource page. The New dialog box opens. Enter a **Title**.

You can enter a **Description** and format the text using the buttons above the textbox. When entering links in the description, we recommend using the formatting buttons to add an underline and/or color to the link's URL. This helps users quickly identify it as a link. Note also that the cursor automatically changes to a hand whenever you move over a link.

You can add URL links and RSS feeds or upload files as attachments. If you want to prevent users from editing this resource, turn on **Locked**. Users can read locked resources, but cannot edit them. Click **Save**. The resource is added to the category.

To modify an existing resource, highlight it and then click **Edit** at the bottom of the resource page. After you enter your edits, click **Save**. To remove a resource, highlight it and click **Delete**; you are prompted to confirm the deletion.

View Resources

The Resource list shows the current available scopes. Click on a scope to see the table of resource categories. For each category, the title and number of resources is displayed. Click on a category to display its resources. To navigate to the list of categories, click on the scope name at the top of the resources table.

Icons identify the type of link. RSS feeds use a broadcast icon and files use a paperclip icon. The **Resource Title** and **Description** are displayed. Click on a link to display it.

Forums

Forums let users discuss topics and post comments with other users in the introNetworks community. Typically, forums are organized into categories which cover a specific issue. Within each category, you have topics. Comments are posted to topics.

As System Administrator you can add, edit, or delete forum categories. Group Administrators and Managers can also create and manage forum categories for the groups they create.

Create Forum Categories

To add a forum category, click **Add Category** from the Category table. The Add Forum Category dialog box opens. Enter a title for the **Forum Category** and a **Forum Description**.

If you want to suppress this category from users, click **Hide**. Hide is useful if you want to decommission a group forum for a period of time without deleting it. If you do not want users to post to this category, click **Lock**. Lock allows users to access the forum category but prevents them from contributing to it.

Specify the **Scope** for your forum. Select **Global** if you want all users to access this forum category. To restrict the scope to **Pin** or **Group**, select the pin type or group name from the **Allow** pull-down menu. Click **Save**. The category is added to the Forums list.

As System Administrator, you can have control over all forums content regardless of the creator. To edit or delete a forum category, click the green circle or red circle in the Forums category table. You are prompted to confirm the deletion.

Create Topics

A forum category can include multiple topics. To add a topic, click the forum category on the Forums list to open it. Click the **Add Topic** button. Enter a topic title and body text, then click **OK**.

Edit Posts

In your role as System Administrator, you can also edit or delete posts added by other users. Select the forum category from the Forums list. Click on a post display it. Click the **Edit** or **Delete** button. You will be prompted to confirm the deletion.

View Forums

When you click the **Forums** scope in the accordion menu, the Forums category table is displayed. For each forum category, the name, how many topics and total posts are in that category and the timestamp for the last update is shown. We also show **Status** icons next to the category name. Forums can be **Open**, **Locked**, or **Hidden**. Users can read and post comments to open forums. Locked forums (indicated with a lock pad icon) are read-only; users can only view the category but cannot post comments. Users will not see hidden forums (indicated with the cross-bar circle); they are for administrative use only.

Manage Reports

To access system reports open the **Manage** accordion menu. Click **Reports**. The reports list is displayed. Click the report you want to display or export:

- System Usage Statistics
- Users
- Word Selection
- Logins by Date
- More Details
- Forums
- Marketplace
- Resources
- Groups

You can export all reports to a CSV file that you can open in Excel. Click the Excel icon at the top of the list display. A file browser opens. Enter the file name and click **Save**.

Some reports include pie charts; the pie chart is not exportable.

System Usage Statistics

The **System Usage Statistics** report provides information on the number of accounts, logins, and messages for your system. This report includes all users in your community.

The total number of accounts and completed profiles are displayed along with the completion percentage. A profile is considered completed when the Contact Information and Tags pages are fulfilled. A pie chart displays the completion percentage; hover the mouse over the chart to view the statistics.

For logins, you can view the total number of logins in the last 24 hours and average number of logins per user. The average is calculated by dividing the total number of profiles by the total number of logins since the site creation. The average login time in minutes is included.

For messages, you can see total number of messages sent and unread messages.

Users

The **Users** reports supply a variety of information about your users. Select a report from the pull-down menu. Use the scroll bar to access all your options including:

- Top 50, 100, 500, 1000, or no-limit users by:

    - total logins
    - average session length
    - alignment percentages
    - forum posts
    - messages sent
- users with unread messages
- new users since 24 hrs, 7 days or 1 month
- profile completion
- all users
- each pin type

Each report includes user pin type, name, job title, and company, along with the specified option information. Click on a heading to sort by it.

At the top of each report, you can see the total number of users included in the report and the number of users selected. Use the checkbox to select users. They will be included when you export the report or send a message.

You can export each report separately. To specify which users to include, click the user checkbox and then click the Excel icon in the upper right corner.

Note that for the **All Users** report, additional information is included in the CSV file. The report has 25 fields detailing basic contact, password, and pin type information, as well as the number of logins and the last login date. You can sort and format this information in Excel as needed.

To send a message to users, select the users and click the mail icon in the upper right corner. The **New Message** window opens.

Click on a user to open his introCard.

To create your own custom user reports, open the Connections / Search menu and use **Smart Search** to generate an exportable user list.

Word Selection

The **Word Selection** report is a useful tool for marketplace ad research. It generates both a word cloud visual tool as well as an exportable report. By identifying the most commonly selected tags for your community, you can see the characteristics of your users.

Click **Word Selection** to generate a word cloud of the most common tags selected by users. Use the tabs at the top to select the tags to include in your report. Click **Top Tags** to generate a report for the top 40 tags; this is the default report. There are also tabs for each tag list heading. Click on a tab to generate a word cloud that includes only the tags on that list.

In the word cloud, tags are listed in order of popularity. The font size indicates the frequency of tag selection in user profiles; the most popular tags appear in the largest font. The actual word count and the profile wordbox display when you hover the mouse over the word. The wordbox identifies the question or prompt for this tag in the user profile

At the bottom, the information is displayed in report format. For each tag, you can see its selection count and its wordbox from the user profile. Click on a heading to sort by it. To find a specific word, click **Word** to sort alphabetically. To view words in ascending or descending order of popularity, click **Selections**.

Logins by Date

The **Logins by Date** report lists activity for a specified date range. Use the **Start Date** and **End Date** fields to set your range. The default is the last 30 days.

For each day, the number of logins and the average session length is displayed. The data is shown in graph and report format. You can hover your mouse over the graph to display data points. The graph is not exportable.

To view all users who logged in on a particular day, double click the day from the graph or the table. The drilldown report shows the Login Date and Time, Name, Login Date and Time and each person's session length. This report is also exportable to an Excel file.

More Details

The **More Details** reports pull data from the extra information section on first page and all of the fields on third page of the user profile. There is a separate report for each question or prompt in that section.

For each report, the following information is displayed:

- total number of system users
- number of users that completed the question
- number of users that did not complete the question

- percentage of completed questions

For reports that gather data from pull-down lists, each selected response is displayed along with number of users and the percentage of users that selected it. A corresponding pie chart is displayed. When you move the mouse over the pie chart, the response, count, and percentage are displayed. The pie chart is not exportable.

For reports that gather data from fill-in-blank questions, only the summary data for number of users and completion percentage is displayed. These reports do not generate a pie chart.

To view more detailed data for any report, export it to Excel. The exported file will include name, email address, and response for each user. Note that if you have a large database, it make take a few minutes for the report to generate.

Forums

Click **Forums** to generate a list of Forum categories. For each category heading, the number of topic threads, posts, and views are displayed.

Click the **Community** tab to display these details for your community resources. For group resource, click the **Groups** tab and select your group from the pull-down menu.

Marketplace

Use the **Marketplace** report to display a list of all your system ads. For each ad, you can see the name, type, placement, targeting, number of views, and number of clicks. Click on a heading to sort by it.

Resources

Use **Resources** to display a report detailing your introNetworks community resources. You can also generate reports for group resources. For these reports, the following information displays:

- category name
- total number of resources
- number of images
- number of RSS feeds
- number of other resources.

To sort by a heading, click on it.

Click the **Community** tab to display these details for your community resources. For group resource, click the **Groups** tab and select your group from the pull-down menu.

Groups

The **Groups** reports provide information on each group including group name, creation date, creator, and number of members. Click on a heading to sort by it.

Use the **Group Category** pull-down menu to select a category. All groups in that category are listed. The default is to display **All Categories**.

Manage Marketplace

To create and manage your on-screen ads, click the **Manage** accordion menu and then click **Marketplace**. You can create graphic or text ads with various placements and sizes. Ads can be targeted to users according to your specifications. You can also specify the display order for your ads.

Ad Summary

When you open the Marketplace menu, the **Ad Name** list displays the names of your ads. If you click on an ad name, a preview is displayed and details are provided including type, placement, duration, and targeting data.

The **Ad Metrics** are the statistics for the selected ad. You can see the total number of times the ad has been viewed by users and the total number of times users have clicked on the ad to access its website. For each user that viewed the ad, the user name, number of clicks, and number of views are provided. This is a sortable list; click on a heading to sort by it.

Create Graphic Ad

To create a graphic ad with an image file, click **Create** in the Marketplace menu. Enter your ad name and select **Graphic**. Three ad sizes are available; each size has options for placement. If you want the ad to always be visible on your system, select a size with sidebar placement.

Choose your ad size (in pixels) and then its placement:

- **Half Banner** (234 x 60) **–** specify **Dashboard** or **Sidebar**
- **Full Banner** (468 x 60) – specify **Dashboard** or **introCard**
- **Square** (250 x 250) – only **Sidebar** is available

Your selection is displayed as a red box in the Size and Placement Preview window.

Enter the **Destination URL** for your ad. When a user clicks the ad, he will go to this link. Click **Preview URL** to test it.

Click **File Upload** to add an image to your ad. A file browser opens; select an image. Allowed formats are JPG, PNG, and GIF files. A preview is displayed. Make sure that your file size is appropriate for your ad specifications; if the file is too big or too small you will get an error message.

Select your **Ad Duration**. This is the number of seconds the ad is displayed before it cycles to the next ad.

Note that users do not see new ads until they log back into the system.

Create Text Ad

To create an ad with only text, click **Create** in the Marketplace menu. Enter your ad name and select **Text**. Select **Dashboard** or **Sidebar** for your placement. If you want the ad to always be visible on your system, select sidebar placement.

Your selection is displayed as a red box in the Size and Placement Preview window.

Enter a **Headline** for your ad. You can enter up to two lines of description. In the **Display URL** textbox, enter the text for the clickable link to a website. When the user clicks on it, the website specified in **Destination URL** opens.

Ad Targeting

When you create your ad, you will need to specify its target audience. Depending on the type of ad you are creating, you can target two ways:

- **Smart Tag Search –** Targets the greatest number of users by searching for the 40 most common profile tags.
- **Select Groups**, **Pins**, **Tags**, or **introCards –** Targets specific groups, pin types, profile tags, or users.

Smart Tag Search

For dashboard and sidebar ads, you can use **Smart Tag Search** as a targeting tool. **Smart Tag Search** finds the top 40 profile tags for this site. Any users who selected any of these 40 tags in their profile will see the ad. This targeting method displays your ad to the most number of users.

Select Groups, Pins, Tags Ad Targeting

You can also target users who are members of a specific group, who are a specific pin type, or who have selected specific tags. To do this, turn off **Smart Tag Search** by clicking its checkbox. Click **Select Groups**, **Select Pins**, or **Select Tags** to display their pull-down menus. Click on an item to select it. Use Shift-click or Ctrl-click to select multiple items. Use the **Set** button to save your selections. The ad will display for all users in these groups, with these pin types, and with these tags in their profile.

Note that only users who meet all the criteria will see the ad; each specification must be met. For example, let's say you select the *Cooking* group, the *Community Leader* pin type, and the *Animation* and *Logical* tags. Only users who are in the group, are this pin type, and have these tags in their profile will see the ad. This is a very specific way to target users.

introCard Ads

For introCards, ads must be graphic and full banner. You can assign ads to introCards by group or pin type, or you can specify certain users.

Click **Select Groups** or **Select Pins** to display their pull-down menus. Click on an item to select it. Use Shift-click or Ctrl-click to select multiple items. Use the **Set** button to save your selections. The ad will display on the introCards for all users in these groups with these pin types.

Note that only users who meet all the criteria will display the ad on their introCard; each specification must be met.

To include the ad on the introCard of specific users, click **Select introCard**. Any current introCards that are specified for this ad are displayed. To add introCards, click **Add New introCards**.

In the dialog box, use the search tool to generate a list of potential introCards. Enter all or part of a first name, last name, or company name, and then click the search icon.

A list is displayed in the **Possible introCards** box. Click a name to select it; you can also use Ctrl-click and Shift-click to select multiple names. To move the highlighted names to the Selected introCards box, click the + (plus) button; click + multiple times as names are added one at a time. To remove a name, highlight it and then click – (minus). Click and drag also works to move names between the lists. When your list is complete, click **Add introCards.**

A sortable member list is displayed. Click on a heading to sort by it. Use the scroll bar to move up and down the list.

To remove an introCard from the ad list, highlight the name and then click **Remove introCard**.

Edit and Delete Ads

You can edit your ad layouts and target information as needed. On the Ad Name list, select the ad and then click **Edit**. Click **Save** to retain your changes.

To delete an ad, select it from the Ad Name list. Click **Delete**. You are prompted for confirmation before the ad is deleted.

Rank Ads

For dashboard and sidebar ads, you can specify the order in which ads cycle through. If you want certain ads to appear when users first log in, assign them a high ranking. After all the ranked ads are displayed, unranked smart ads appear followed by unranked targeted ads.

On the Marketplace menu, click **Rank Ads**. Click **Sidebar** or **Dashboard** to specify the type of ad you want to rank.

Any ranked ads are displayed. For each, you can see their ranking number, name, type, size, and duration in seconds. All other ads are displayed on the Unranked Ads list. For each, the ad name, type, size, and duration are provided.

Click and drag to move ads between these two lists and to arrange their ranking order.

When are you are finished, click **Save Rankings**. Users will not see these changes until they log back into the system.

Maps (Optional fee-based feature)

If you site is configured to have the community maps in Connections, you have the ability to create Point of Interest locations.

Point of Interest (POI) locations identify places that might be of interest to users in your community. Organized by type such as restaurants, schools, or airports, each POI appears as a pin on your community map. When the user scrolls over the POI pin, a mini-card displays; he can open the card to see more detailed information on the POI location.

As Community Administrator, you can add, edit, or delete POI types and locations in your community maps. Click the **Manage** accordion menu and then click **Maps**.

First define your POI types; then create POI Cards for each location. For each POI location, you must input address information to plot its location. You can also include the following additional information to appear on its POI Card:

- contact details
- image or logo
- website links
- photos and files

Create a POI Type

To add a POI type, click **Create** on the Maps menu. The Create POI Type dialog opens.

Enter a **Type Name** for the POI. Click **Icon Color** to select a pin color from a palette. For optimum pin viewing, use a unique color for each POI type. Note that POI pins have a white center; this differentiates POI pins from user pins. Click **Save**. The new type is added to the POI Type list.

To modify an existing POI type, highlight it and then click **Edit**. After you enter your edits, click **Save**.

To remove a POI type, highlight it in the list and click **Delete**. Be aware that deleting a POI type also deletes all its associated locations. You are prompted to confirm the deletion.

Add a POI

After you create a POI type, you can enter specific POI locations for it. In the POI type list, highlight a POI type to open it.

Click **Add** at the top of the window. The first page of the **Create POI** tabbed menu opens.

Information

Use the **Information** page to enter the address for mapping the POI location. You can also add contact information to appear on the POI card.

From the **POI Type** pull-down, specify the POI type for this POI location. The default is the POI type selected from the POI Type list.

Enter the **Name** for this POI location; this is a required field.

The address fields**—**specifically **Address1**, **ZIP** or **Postal Code**, **State**, and **Country—**are used to plot the POI location on the map. Although **ZIP** or **Postal Code** is the only required address field, the more address information you enter the more accurate your mapping will be.

Enter the street address in **Address1**; this field is used to plot location so be sure to enter the actual physical address. You can use **Address2** to enter additional information such as a suite number or a PO box address. Note that the mapping hierarchy looks only at **Address1**; **Address2** is used only as information for the POI Card.

You may add additional information for your POI including **City**, **Country**, **State**, **Phone**, **Fax**, **Email**, and **Website**. Enter a **Description** of this POI. All this information will appear on the POI Card.

When you are done, click the **Next** button at the bottom of the page to move to the **Default Photo** page. You can return to this page at any time to make changes. To create your POI Card without entering additional information, click **Save** at the top of the screen.

Note that this is the only page required to create your POI Card; however, adding more information improves the value of the POI Card.

Default Photo

Use **Default Photo** to add an image or logo to your POI Card. This photo also appears on the POI mini card that is displayed when a user rolls over the POI pin. If you do not add an image in **Default Photo**, the first image added in **More Media** is used. If you do not have any images in **More Media**, the pin type icon is displayed.

Click **Upload** to navigate through the file browser to select a file. Allowed formats are JPG, PNG, and GIF files under 500 KB.

When you are done, click the **Next** button at the bottom of the page to move to the **Online Content** page. Click **Previous** if you want to return to **Information**. You can return to this page at any time to make changes. To create your POI card without entering additional information, click **Save** at the top of the screen.

Online Content

Use the **Online Content** page to include additional websites on the POI. Typically, this is a link to the POI's website; you can also add links to other websites including blogs, photo-sharing sites, or podcasts. Multiple websites are allowed.

Click **Add** to display the data entry box. Enter the website URL. You can add a caption for the link; this is an easy way to give a concise title to a long URL. Click **Save**.

The website captions and URLs are listed. To remove a website, select it and click **Delete**. Note that you are not prompted to confirm your deletion.

When you are done, click the **Next** button at the bottom of the page to move to the **More Media** page. Click **Previous** if you want to return to **Default Photo**. You can return to this page at any time to make changes. To create your POI card without entering additional information, click **Save** at the top of the screen.

More Media

More Media lets you include additional photos or files on the POI Card. When users open the POI Card, they can scroll through and download these images and files.

Click **Upload** to navigate through the file browser to select a file. Each file must be less than 1 MB. Use the **Select a File** and **Delete** buttons to add and remove files.

When you are done, click the **Save** button. Click **Previous** if you want to return to **Online Content**. You can return to this page at any time to make changes.

View a POI Card

When you open the **Maps** menu, a list of your POI types is displayed. To sort this list alphabetically, click the heading. To view a POI location, select its type from the list.

A list of locations for that POI type is displayed. The POI type name and pin color are displayed at the top. For each POI location, its name, street address, and zip code are listed. Click on a heading to sort by it.

To open a POI, click on it. The POI default photo or pin type, name, address, and description are displayed. If additional photos or file were added in the **More Media** page, you can click the default photo to scroll through them.

To view the POI Card, click the **View POI Card** button at the bottom of the screen. The POI card includes:

- address, other contact data, and complete description from the **Information** page
- website links entered on the **Online Content** page
- default photograph or pin type; scroll to view any other photos or files added in the **More Media** page
- POI pin location on a map

Edit a POI Card

To edit a POI Card, select its POI type from the POI Type list. A list of all POIs for that type is displayed.

Click to select the POI you want to modify. Click the **Edit** button at the top of the window. The **Edit POI** tabbed menu opens. After you have entered your changes, click **Save** to retain your edits.

Delete a POI

To delete a POI Card, select its POI type from the POI Type list. A list of all POIs for that type opens.

Click the checkbox to select the POI you want to remove. To select multiple POIs for deletion, click their checkboxes. To select all POIs for deletion, click the checkbox in the header. Click the **Delete** button at the top of the window. You are prompted to confirm the deletion(s).

Exiting

To exit the introNetworks system, click **Sign Out** in the upper-right corner of the screen.