CMS

DIGITAL EXPÉRIENCE MANAGEMENT (DXM)

Master

Admin Guide

Tuesday, March 12, 2019

V3

CONTENTS

INTRODUCTION
Healthgrades 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 Healthgrades' 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, with no coding required.

However, if markup or style language is your preference, CMS's editing tools are every bit as intuitive and convenient.

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

Conventions Used in this Document
References to screens and components of the application are in **Bolded Initial Caps**. Field values are represented in *italicized* text. *Italicized* text is also used for emphasis.

Disclaimer
The screen samples included in this document may vary from those you see in your software, based on configuration options selected. Screen samples are included in this documentation 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.

THE EVENTS CONTENT APP

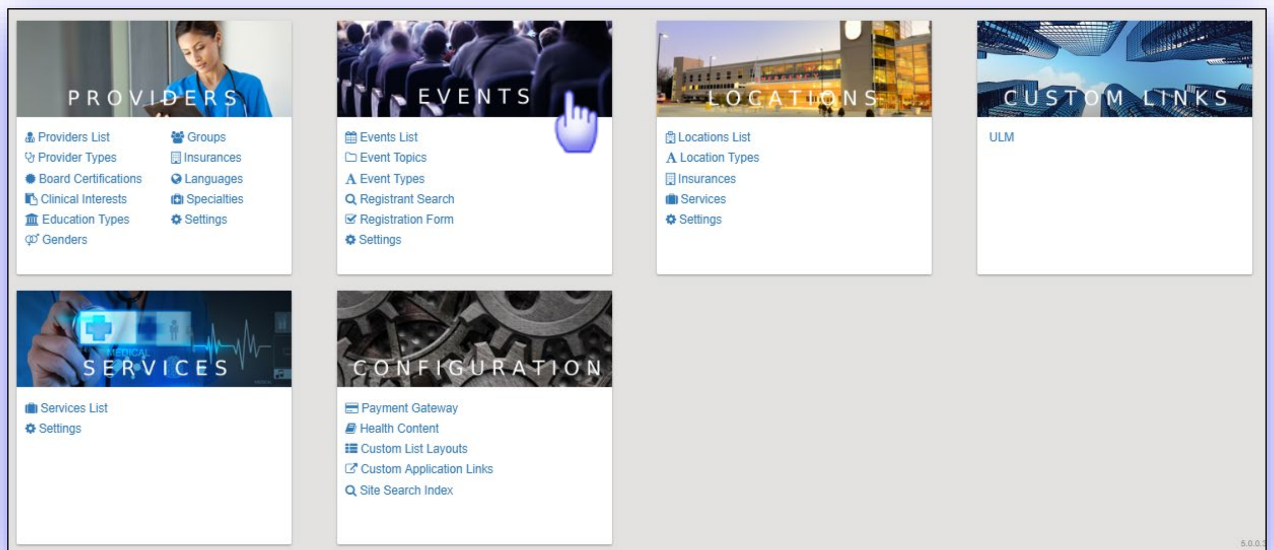
The **Events Content App** allows consumers to search for events that are associated with the health care organization. In this app, services and associated content can be customized based on the health care organization's preferences.

ACCESSING EVENTS

To access **Content App** components from anywhere within CMS, click the **Content Apps** icon from the **CMS** left menu, as shown in the screen image below.

The **Content Apps** console displays. From the **Content Apps** console, you can manage **Providers**, **Events**, **Locations** and **Services**. Each content app has its own menu of management items.

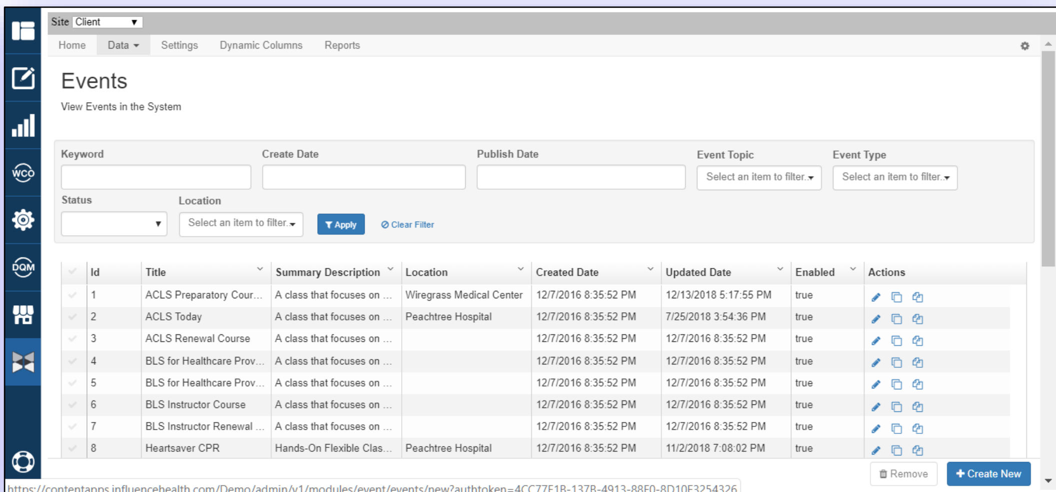
Click the **Events Content App** image, outlined in red below, or the **Events List** link from the **Events** menu to open the **Events** page.



HOW TO PERFORM A FILTERED SEARCH

The **Events List** page presents a multi-tabbed screen. 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**
- **Dynamic Columns**
- **Reports**



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

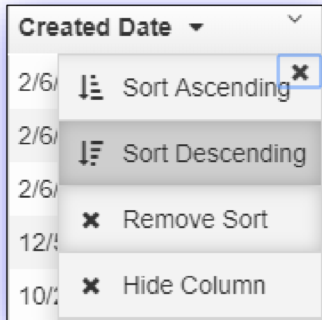
- **Keyword** (free-text entry)
- **Create Date** (free-text entry)
- **Publish Date** (free-text entry)
- **Event Topic** (drop-down, listing topics such as: *ACLS CPR NRP COURSES, ACLS Topic, Bariatrics Weight Loss Surgery, Bone Health, Cancer, Cancer Support Groups to Transplant Organ, Weight Management, 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*)
- **Location** (drop-down, listing your hospital locations)

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.)
- **Updated Date** (This is the date the event record was updated.)
- **Enabled** (If enabled, this event is viewable and searchable.)
- **Actions** (Applicable to the selected record, or row, these are: **Edit**, **Copy Event** or **Copy Event and Occurrence**.)

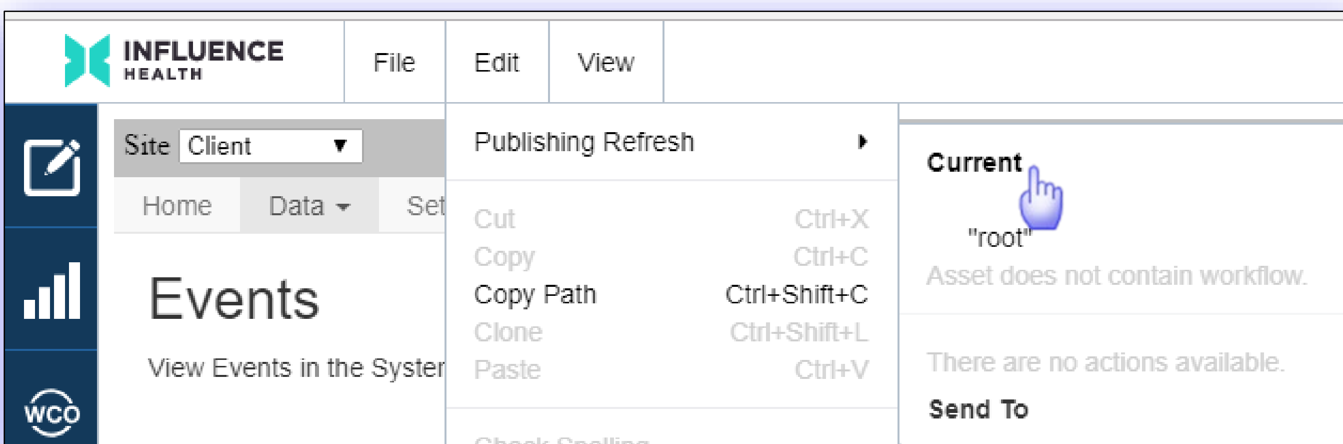
USING THE COLUMN SORTING OPTIONS

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.



UNHIDING A HIDDEN COLUMN

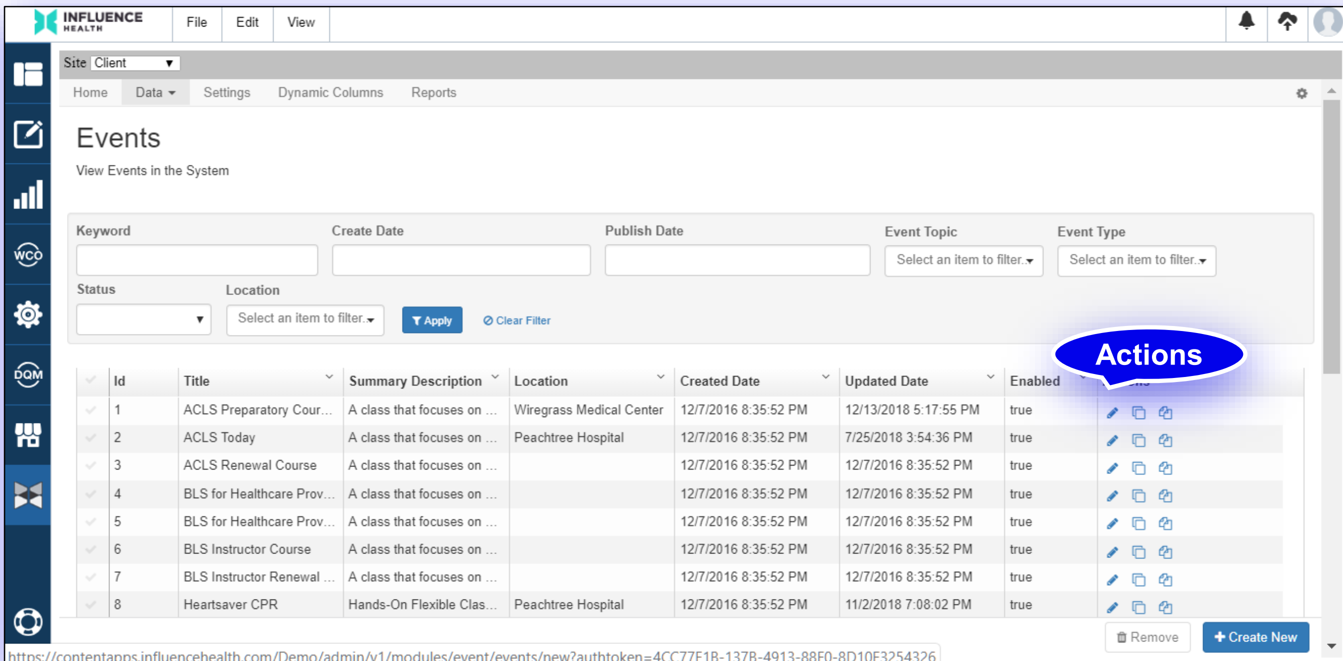
To unhide a hidden column, select **Edit** > **Publishing Refresh** > **Current.**



USING THE ACTIONS BUTTONS

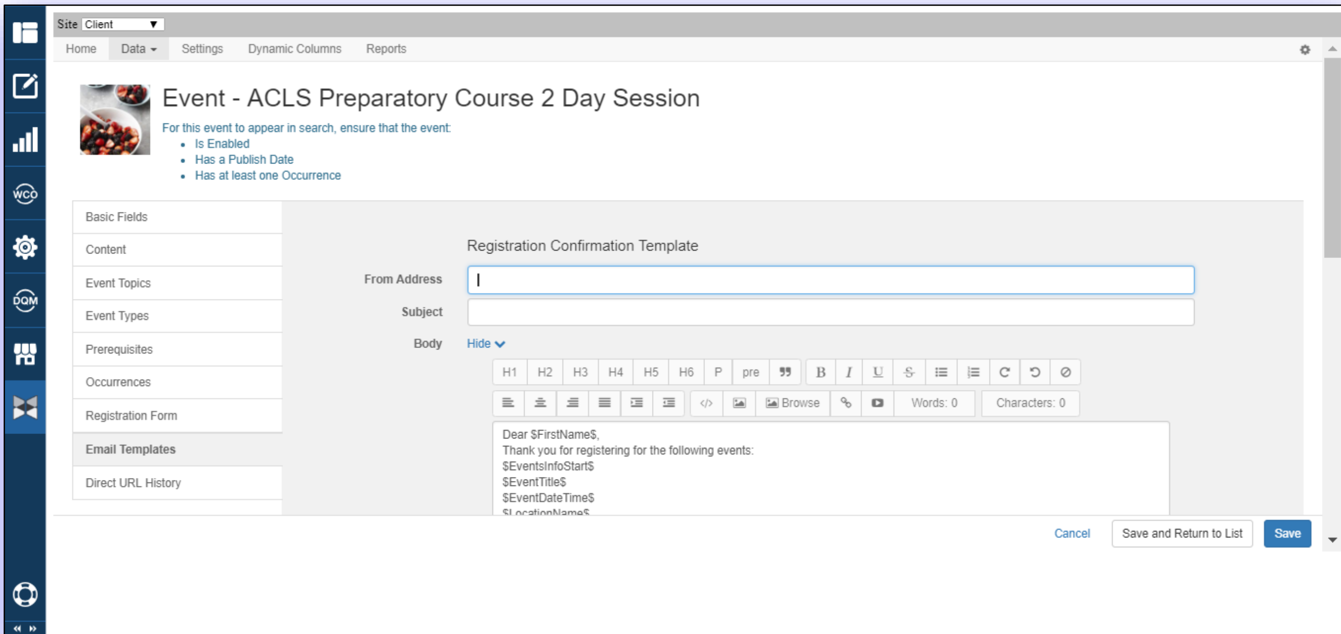
Under the **Actions** column are additional options that are applicable to a selected record, or row: **Edit**, **Copy Event** or **Copy Event and Occurrence**.

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.



HOW TO EDIT AN EVENT

With your record selected, click the **Edit** (pencil icon) as depicted in the **Using the Actions Buttons** topic. The selected event displays. The fields are similar to the **Create New** event screen. In order for this event to appear in the search filter options, ensure that the event is enabled, has a publish date and has at least one occurrence.



Tabs on the left update the **Edit** screen context.

- **Basic Fields**
- **Content**
- **Event Topics**
- **Event Types**
- **Prerequisites**
- **Occurrences**
- **Registration Form**
- **Email Templates**
- **Direct URL History**

Basic Fields

Basic fields create your **Registration Form**. 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.)
- **Enabled** (Enable/deactivate the event using this checkbox. This field must be enabled for this event to appear in the search filter options)
- **Title** (This is the event title.)
- **Description** (Enter the description of the event.) (ü)
- **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.)
- **Notify Contacts** (Check this box to notify contacts.)
- **Notify Frequency** (Defaults to Immediately. Future functionality will include Weekly, Daily and Monthly.)
- **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.)
- **External URL** (Enter the external URL.)
- **Direct URL** (Enter the direct URL.) (ü)
- **Custom Keywords** (These are keywords that will be associated with the event.)
- **Generated Keywords** (These are non-editable system-generated keywords that are related to the location.)
- **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.)
- **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.)
- **Business Unit ID** (Enter the business unit ID.)
- **Cost** (Enter the price of admission in this free-text field.)
- **Location** (Select the location of the event from the drop-down list options.)
- **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.)

Show

Click the **Show/Hide** button to reveal a contextual-content **WYSIWYG** editor for each of the below:

- **Special Instructions / Show** (Format your message as it will be viewed by users.)
- **Custom Field 1-3** (Add your **Custom Field** content.)
- **Food Choice** (drop-down, select from the available options for your event, such as *Vegan, Non-Dairy*, etc.)
- **Interested in Being Waitlisted** (drop-down, select *Yes* or *No*.)
- **Enable Add Registrant Button** (This checkbox defaults to True, or enabled, meaning the **Event Cart Add Additional Registrant** label and button is available. Uncheck it to hide the **Event Cart Add Additional Registrant** label and button.)

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 Occurrences

To help **Events** Administrators run **Event Reports** more efficiently, display-only **Occurrence IDs** are now viewable in the **Active Occurrences** list, within **Events** admin.

How to Access Event Occurrences

To access **Occurrences**, go to **Content Apps** > **Events (Events List** in the default **Data** tab). Select an event and under the **Actions** tab, click the **Edit** (pencil) icon. When the **Edit** screen opens, in the left panel, choose the **Occurrences** tab. **Active Occurrences** display here.

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.)
- **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.)

Email Templates - Email Cancellation Template

Once a registrant has been removed from an event, a configurable cancellation email is generated and sent to the registrant. With this template, an administrator will be able to design a custom "Thank You" message for each event.

Locate the **Email Cancellation Template** tab in the left navigation of the edit screen for your selected event. The **Email Cancellation Template** has the same configuration fields, tokens, and functionality used in the **Email Confirmation Template**.

Note:
This is not the same as the email that is automatically generated when an event is cancelled.

- **From Address** (Enter a properly-formatted **From** email address (email@domain.com) in this free-text field.)
- **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. Use the tokens throughout (as listed) 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.)

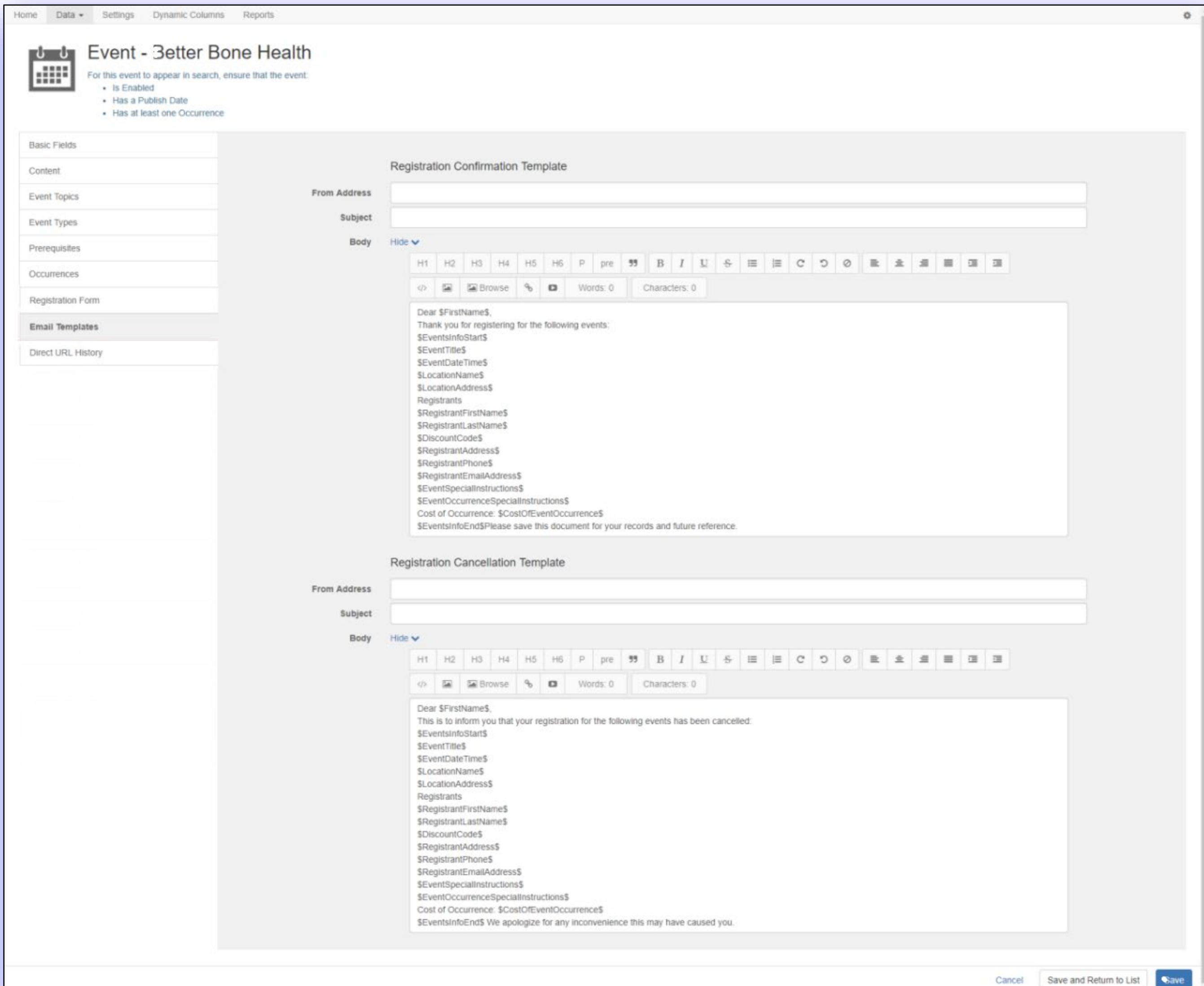
Available Tokens

These tokens populate with information from the **Event Registration**.

- **$EventsInfoStart$**
- **$EventTitle$**
- **$EventDateTime$**
- **$LocationName$**
- **$LocationAddress$**
- **$RegistrantFirstName$**
- **$RegistrantLastName$**
- **$DiscountCode$**
- **$RegistrantAddress$**
- **$RegistrantPhone$**
- **$RegistrantEmailAddress$**

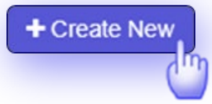
- $EventSpecialInstructions$
- $EventOccurrenceSpecialInstructions$
- $CostOfEventOccurrence$
- $EventsInfoEnd$

Registration Confirmation Template

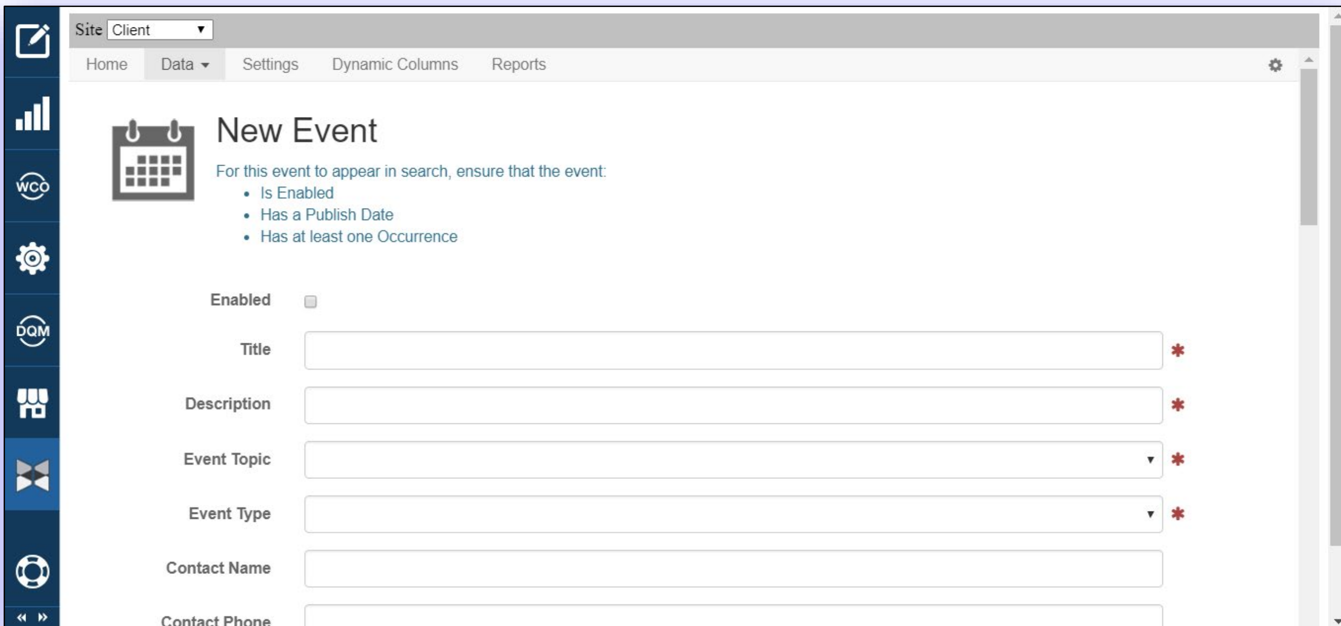


HOW TO CREATE A NEW EVENT

Click the **Create New** button from the lower right of the **Event Data** tab **List** screen.



The **New Event** screen displays, as shown below,



Complete the following fields to create a new **Event** record. These fields are similar to those in the screen that opens to edit an existing record. In order for this event to appear in the search filter options, ensure that the event is enabled, has a publish date and has at least one occurrence.

- **Enabled** (Enable/deactivate the event using this checkbox. This field must be enabled for this event to appear in the search filter options)
- **Title** (Enter the title of the event.) (*required)
- **Description** (Enter the description of the event.) (*required)
- **Event Topic** (Choose an event topic from the drop-down options.) (*required)
- **Event Type** (Choose an event type from the drop-down options.) (*required)
- **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.)
- **Notify Contacts** (Check this box to notify contacts.)
- **Notify Frequency** (Defaults to Immediately. Future functionality will include Weekly, Daily and Monthly.)
- **Publish Date** (Begin typing in this date field to enter the publish date. The calendar widget displays for formatted selection.) (*required)
- **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.)
- **External URL** (Enter the external URL.)
- **Direct URL** (Enter the direct URL.) (*required)
- **Internal Event** (Checking this box indicates that the event is internal.)
- **Public Event** (Checking this box indicates that the event is external.)
- **Generated Keywords** (These are non-editable, system-generated keywords that are related to the location.)

The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

- **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.

  The title element of a web page should be a concise description of a page's content. Users see the title in two places: as the page's name in the browser tab and in search results.) **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.)

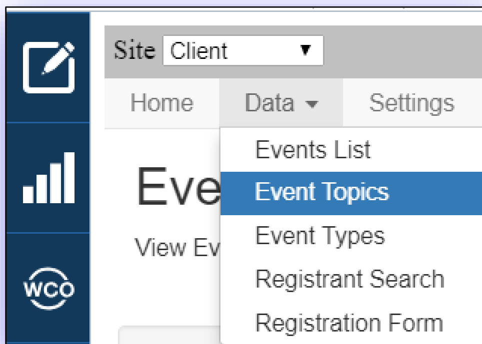
- **SEO H1** (This heading 1 tag element is used near the top of the page as the page version of the page title, or to describe the page's content and is important for optimal SEO.)
- **SEO Primary Keyword** (The primary keyword is the one searched most frequently.)
- **SEO Secondary Keyword** (The secondary 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 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.)
- **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.)
- **Business Unit ID** (Enter the business unit ID.)
- **Cost** (Enter the price of admission in this free-text field.)
- **Location** (Select the location of the event from the drop-down list options.)
- **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.)
- **Special Instructions** (Click the Show/Hide button to reveal a content WYSIWYG editor that allows you to format your message as it will be viewed by users.)
- **Custom Field 1-3** (Click the Show button to reveal a content WYSIWYG editor, so that you can create custom fields with rich-text formatted content, as it will be viewed by users.)

EVENT TOPICS

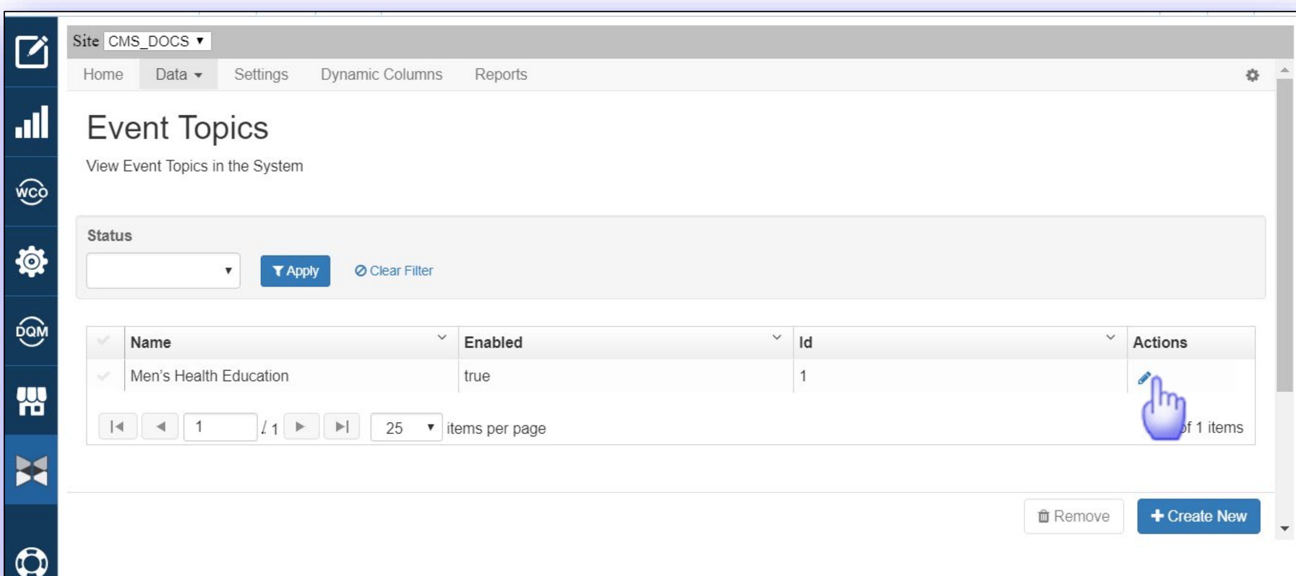
The **Event Topics** option allows you to add, edit and remove event topics. This page contains a filter to assist with locating event topics by **Status** *(All, Enabled, Disabled)*.

Accessing and Editing the Event Topics Page

To access this page, choose the **Event Topics** link from the **Events Content App** menu, we discussed earlier, or from the **Data** drop-down option, within the **Events Content App**.



The **Event Topics** management page displays.



The **Event Topics** management columns are sortable, as described in the **Using the Column Sorting Options** topic.

- **Name (This is the name of the event topic.)**
- **Enabled** (*True* or *False*)
- **ID** (This is the system-generated Event Topic ID. It is non-editable.)
- **Actions** (Click the Edit pencil icon to revise any of these editable field values.)

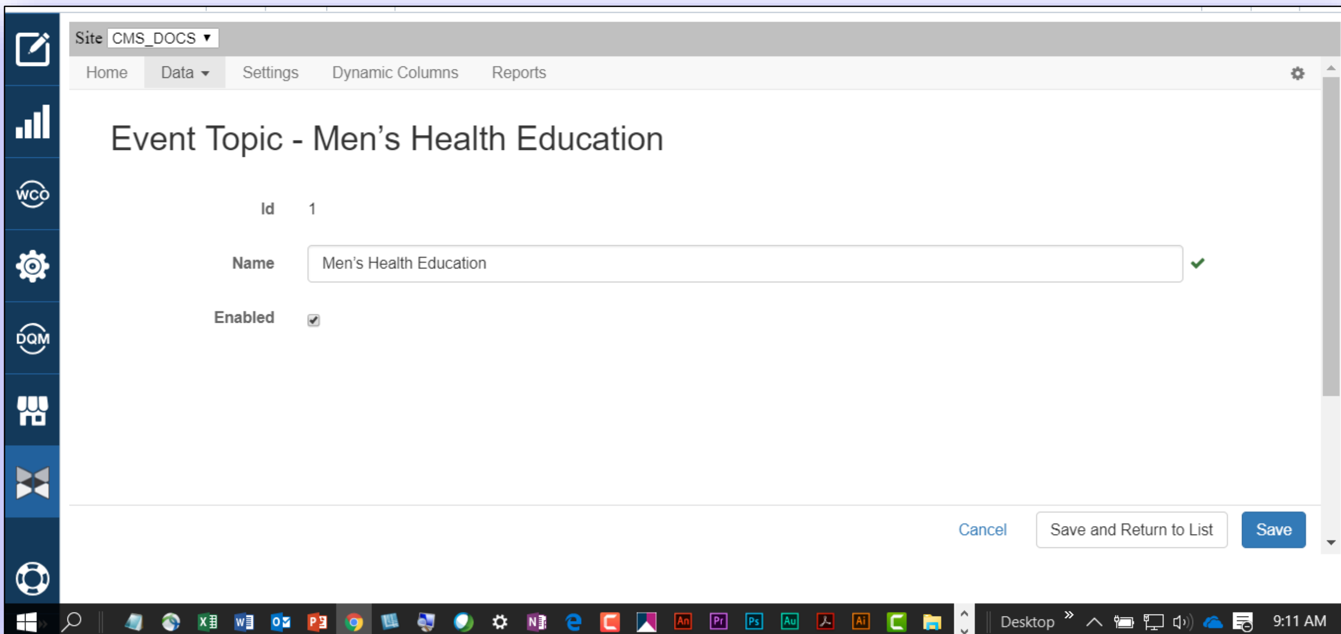
Note:

Event Topics can also be added directly from a Location record.

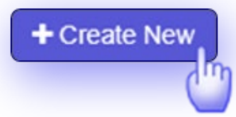
HOW TO EDIT AN EVENT TOPIC

With your target row selected, click the **Edit** (pencil) icon under **Actions**. Make your edits using the available fields.

- **ID** (This is the system-generated **Event Topic ID**. It is non-editable.)
- **Name** (This is the name of the event topic.)
- **Enabled** (*True* or *False*)

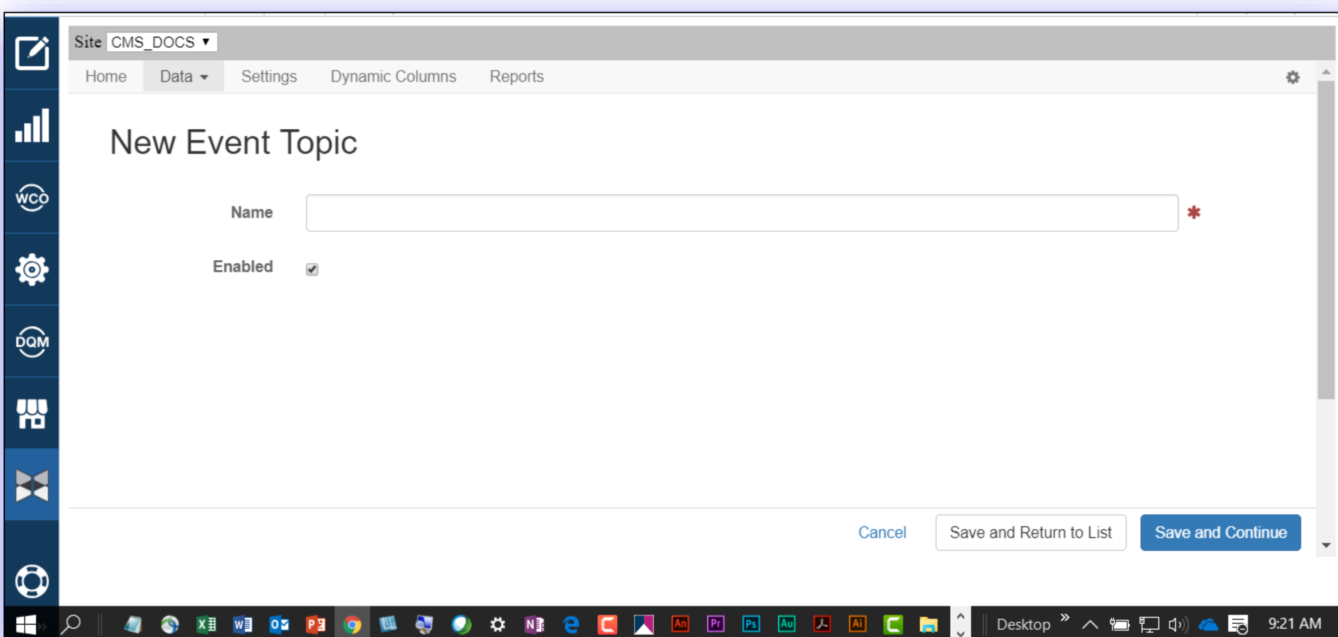


HOW TO CREATE A NEW EVENT TOPIC
Click the **Create New** button from the lower right of the **Event Types** management page.
The **New Event Topic** screen displays, as shown below,



Complete the following fields to create a new **Event Topic** record. These fields are similar to those in the screen that opens to edit an existing record.

- **Name** (Enter the name of the event.) (*required)
- **Enabled** (Enable/deactivate the event topic using this checkbox. This field must be enabled for this event topic to appear in the search filter options.)

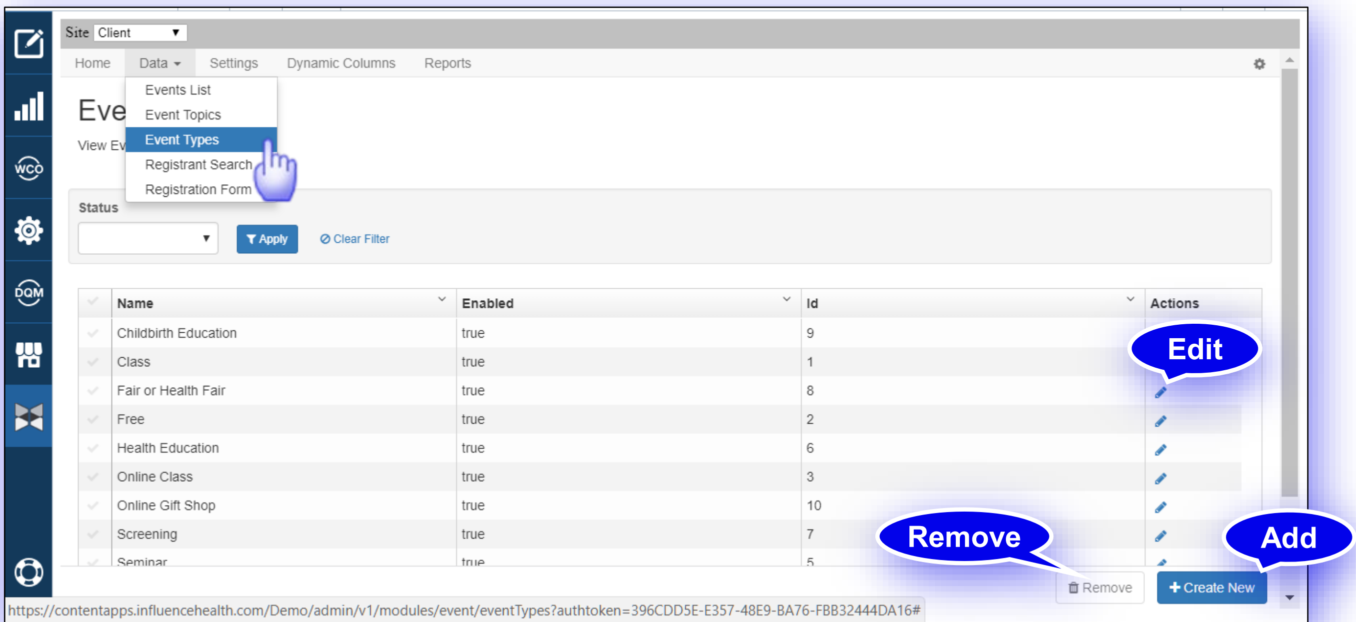


ACCESSING AND EDITING EVENT TYPES

The **Event Types** option allows you to add, edit and remove event types. This page contains a filter to assist with locating event types by **Status** *(All, Enabled, Disabled)*.

To access this page, choose the **Event Types** link from the **Events Data** tab menu.

The **Event Types** management page displays.



The columns are sortable, as described in the **Using the Column Sorting Options** topic.

- **Name** (This is the name of the event.)
- **Enabled** (*True* or *False*)
- **ID** (This is the system-generated Event Type ID. It is non-editable.)
- **Actions** (Click the Edit pencil icon to revise any of these editable field values.)

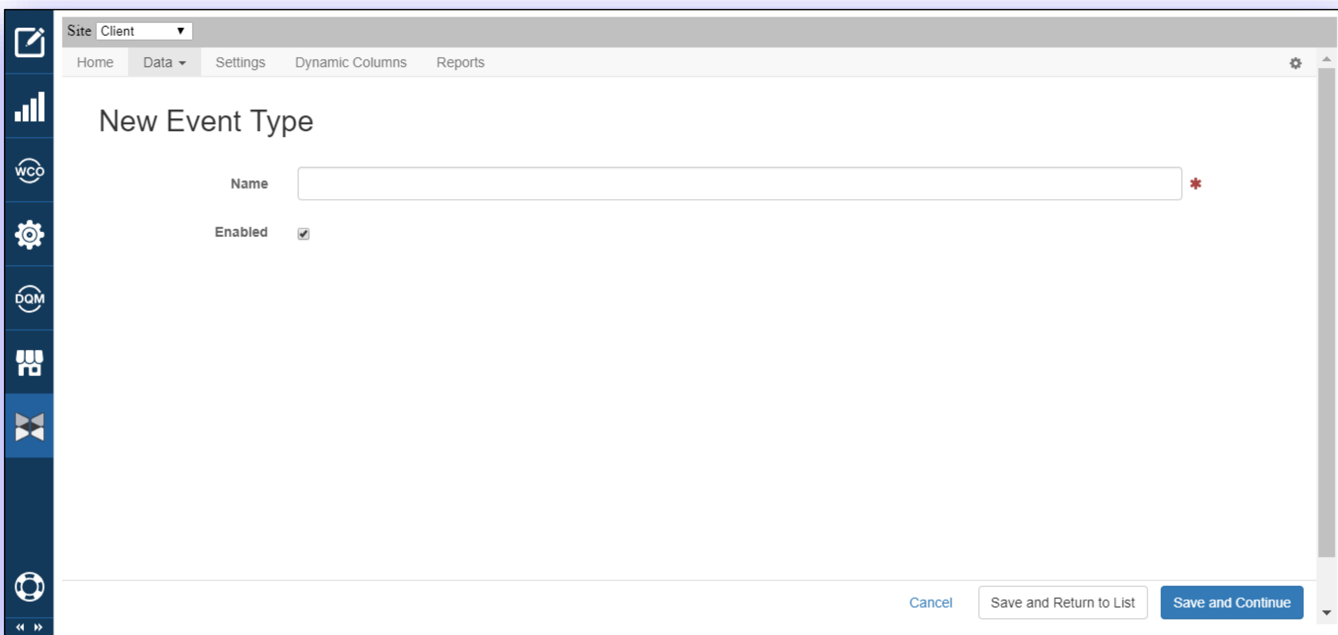
HOW TO CREATE A NEW EVENT TYPE

Click the **Create New** button from the lower right of the **Event Types** management page.

The **New Event Type** screen displays, as shown below.

Complete the following fields to create a new **Event Type** record. These fields are similar to those in the screen that opens to edit an existing record.

- **Name** (Enter the name of the event.) (*required)
- **Enabled** (Enable/deactivate the event using this checkbox. This field must be enabled for this event to appear in the search filter options.)



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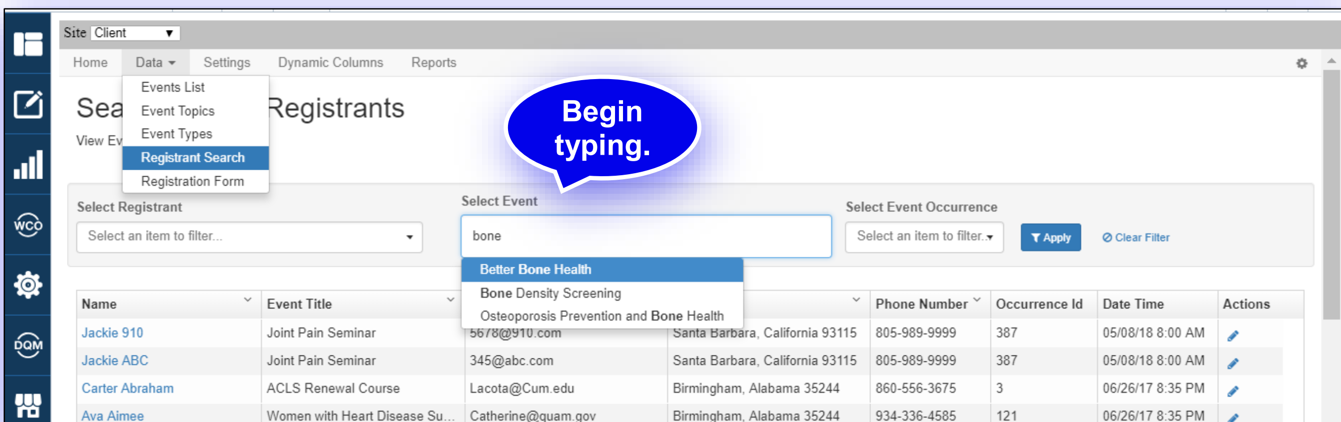
REGISTRANT SEARCH

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 the Registrant Search Page

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.

The **Search Events Registrants** screen displays. Search filters at the top of the screen help refine your search, by **Select Registrant**, **Select Event** and **Select Event Occurrence**. To quickly locate registrants for a specific event, first make a selection from the **Select Event** drop-down options, then use the **Event Occurrence** filter. The type-ahead feature is available in both the **Select Registrant** and **Select Event** fields.



Each registrant row, or record displays columns as listed below. The columns are sortable, as described in the **Using the Column Sorting Options** topic.

- **Name**
- **Event Title**
- **Email Address**
- **Address**
- **Phone Number**
- **Occurrence ID**
- **Date Time**
- **Actions** (View additional detail on a record.)

This information is for reference and is read only.

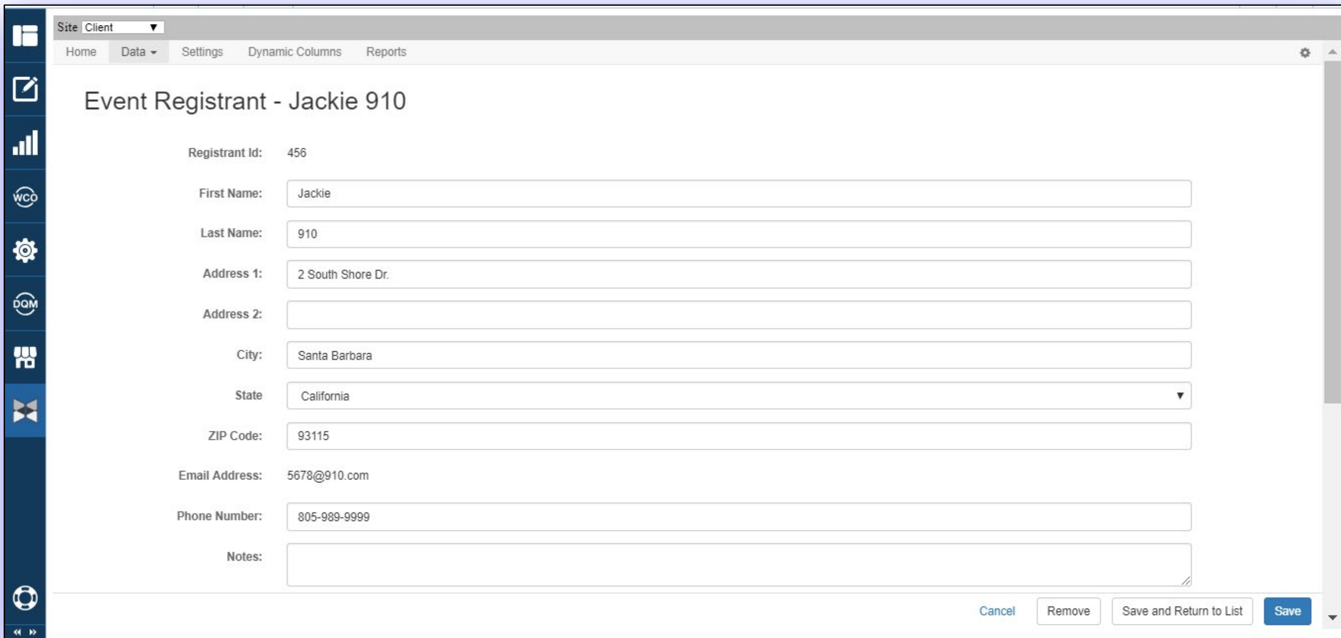
USING THE EVENT REGISTRANT EDIT SCREEN
From the **Registrant Search** screen, click the **Edit** pencil icon next to any record, or row to open that registrant's edit screen. The **Event Registrant** [*Registrant Name*] screen displays, with the following fields:

- **Registrant ID** (This field is system-generated and is not editable.)
- **First Name** (Edit the registrant's first name with this field.)
- **Last Name** (Edit the registrant's last name with this field.)
- **Address 1** (Edit the registrant's street address with this field.)
- **Address 2** (Edit the registrant's apartment number if applicable, with this field.)
- **City** (Edit the registrant's city with this field.)
- **State** (Select the name of the state in which the registrant resides from the drop-down menu.)
- **ZIP Code** (Edit the ZIP code in which the registrant resides in this field.)
- **Email Address** (This field is not editable.)
- **Phone Number** (Edit the registrant's phone number with this field.)
- **Notes** (Editable. Enter or edit notes regarding the registrant with this multi-line field. This field is now also a display field option within Event reporting.)
- **Event Title** (Non-editable link. The link displays the title of the event. For example: Joint Pain Seminar. Click this link to open the Event edit screen for that event.)
- **Date Registered** (Non-editable)
- **Location** (Non-editable This is the location of the event. For example: Peachtree Hospital.)
- **Presenter** (This field is system-generated and is not editable.)
- **Start Date** (Non-editable. This is the start date of the listed event.)
- **Start Time** (Non-editable. This is the start time of the listed event.)
- **Price** (Non-editable. This is the price of the listed event.)
- **Transaction ID** (This field is system-generated and is not editable.

At the bottom-right of the screen are four buttons.
- **Cancel** (Click this button to clear any changes you have made and close the screen.)
- **Remove** (Click this button to remove this event registrant from this event.)
- **Save And Return To List** (Click this button to commit any changes you have made and return to the **Search Events Registrants** screen.)
- **Save** (Click this button to commit any changes you have made.)

About Removing a Registrant from an Event

Clicking the **Remove** button removes a registrant from the event, the **Registrant Search** list and the emailed event roster. On removing a registrant, the available seat count for the event is updated and a cancellation notice is emailed to both the registrant and event contact email address.



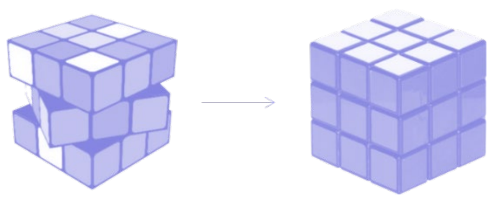
HOW TO ENABLE OR DISABLE THE ADD ADDITIONAL REGISTRANT LABEL AND BUTTON

It is now possible to enable and disable the ability to add additional registrants for individual events, through the API.

In this release, the **Isaddregistrantbuttonenabled** field has been added to the **Event** table in the database. In the **Event** Administrative view, this field displays as a checkbox, labeled **Enable Add Registrant Button**, which is defaulted to *True,* or enabled, meaning the **Event Cart Add Additional Registrant** label and button is available.

When this checkbox is not checked, or is disabled, the **Add Additional Registrant** section and button will be hidden from the **Event Cart** page.

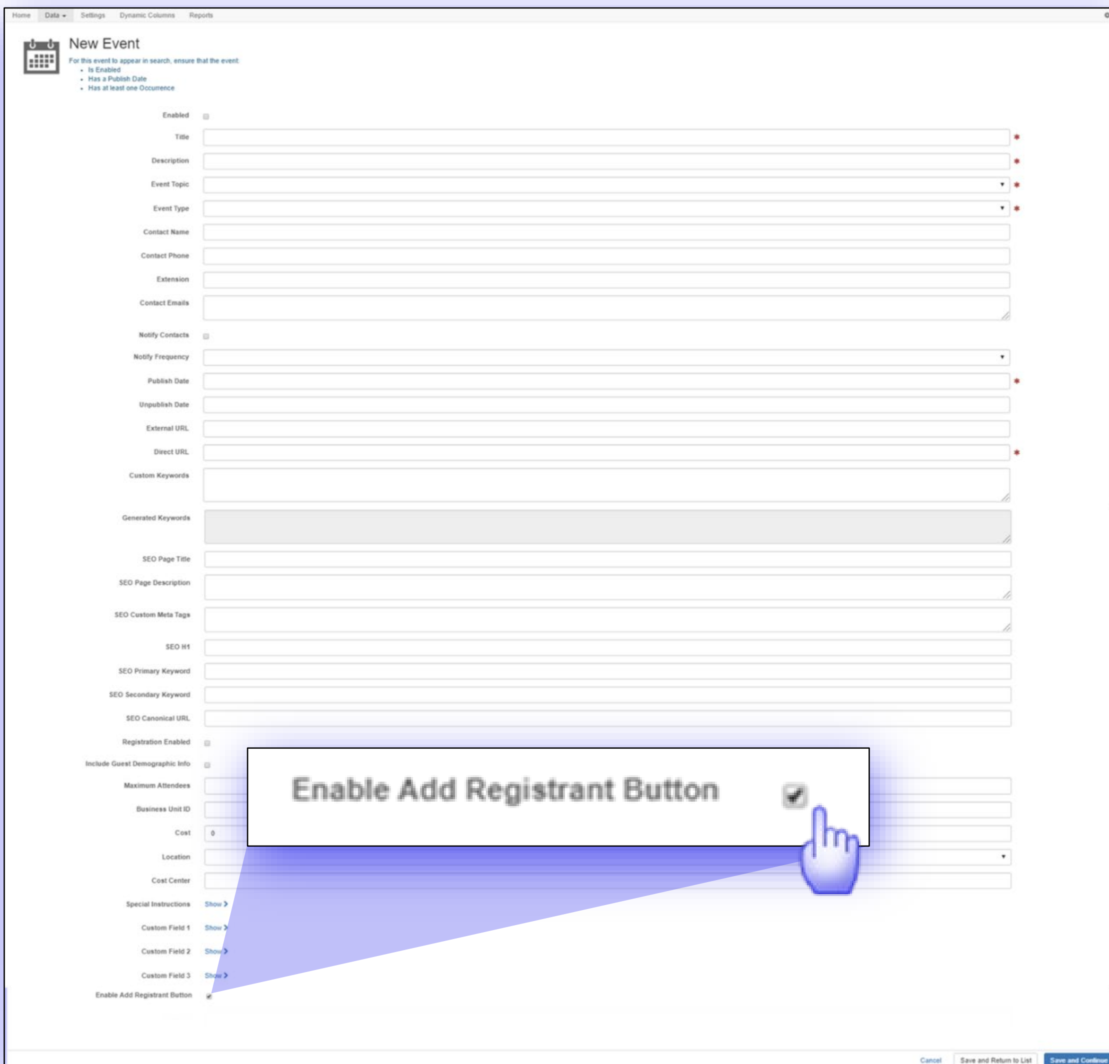
Problem Solved:
Many childbirth education classes have "per couple pricing" wherein two people (mother/partner) can attend for the cost of one registration fee. Users often add the spouse as an additional registrant, which previously resulted in double charging the user and occupying an additional seat in the class, unnecessarily.



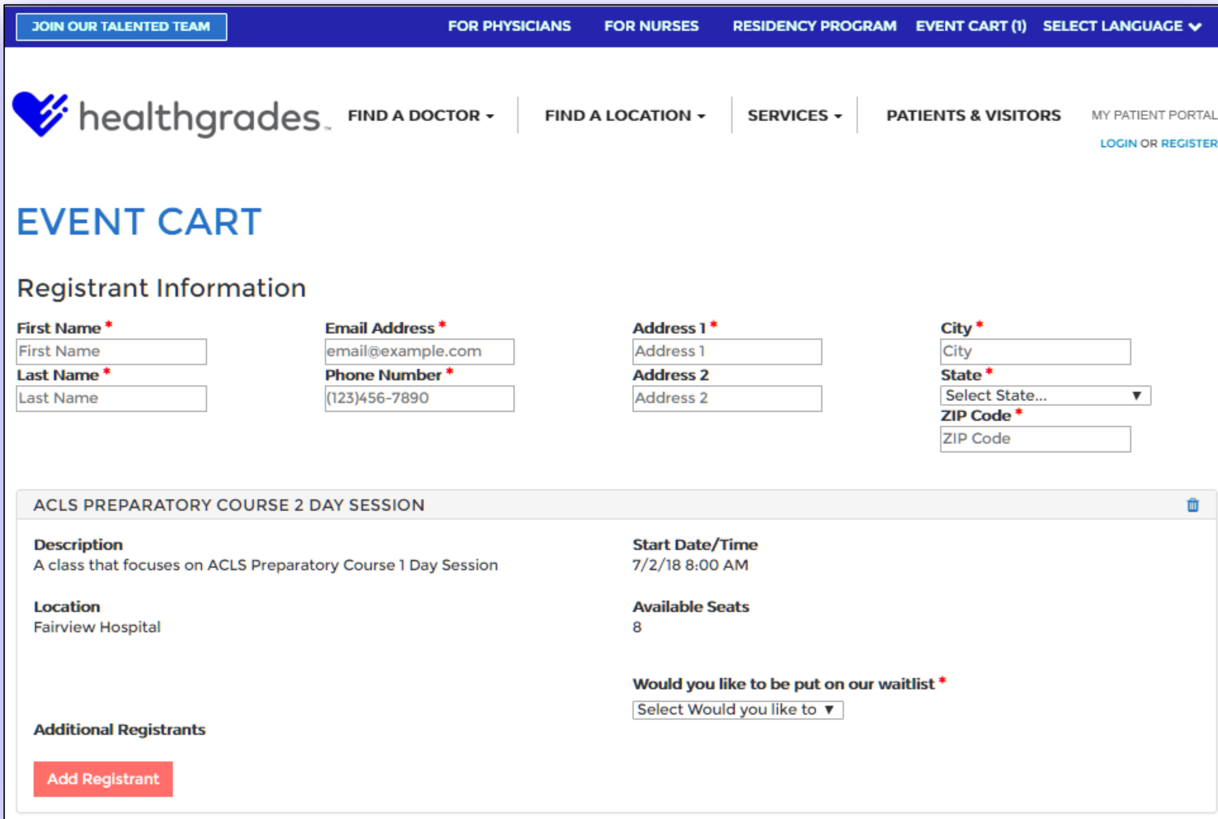
How to Enable or Disable the Event Cart Add Additional Registrant Section and Button

To access the configuration checkbox for this new feature, go to **Content Apps** > **Events List**. Add a new **Event** using the **Create New** button, or select your event from the list and choose **Actions** > **Edit** (pencil) icon.

Depending on your selection, the **New Event** displays, as shown below, or the **Event** edit screen displays, open at the **Basic Fields** tab. In either screen, scroll to the bottom of the page to enable (check) or disable (uncheck) the **Event Cart Add Additional Registrant** section and button with the **Enable Add Registrant Button** checkbox.



This is how the **Event Cart** displays when the **Enable Add Registrant Button** checkbox is enabled (default setting).



Event Cart mailing address fields, which include: **Address1**, **City**, **State** and **ZIP Code** are no longer only required fields, although they are defaulted as such. These fields are now configurable by an Administrator within **Events** as *Required* or *Not Required*.

Note:

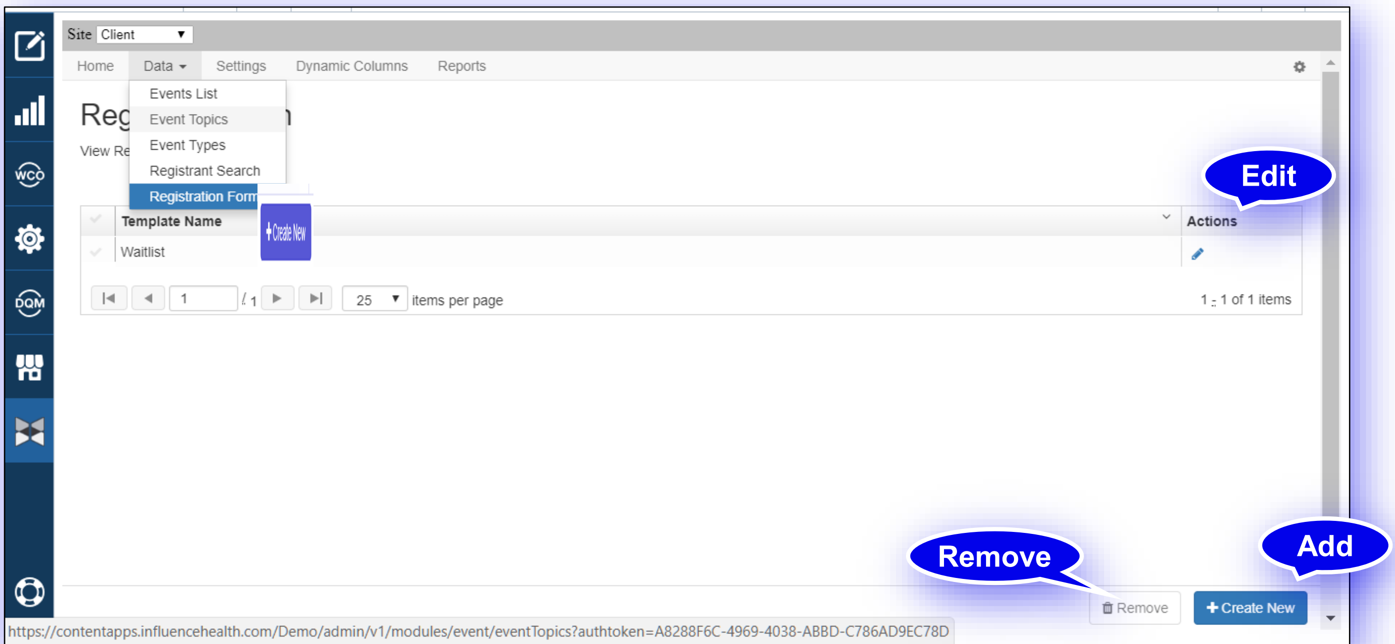
These fields will still be required for any paid events.

REGISTRATION FORM

The **Registration Form** allows you to create, edit or remove custom event registration form fields.

How to Access the Registration Form Page

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.



The **Registration Form** 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.

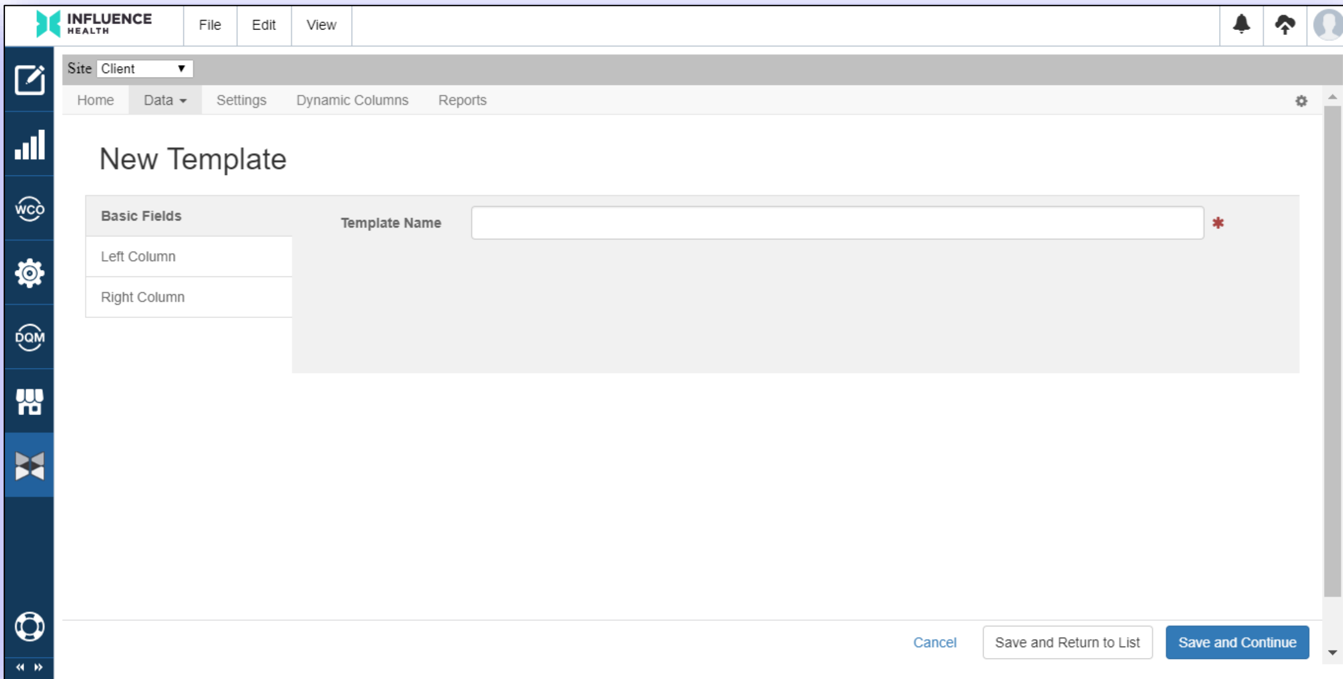
- **Template Name** (**This is the** Registration Form **template name.)**
- **Actions** (Click the **Edit** (pencil) icon to revise the **Template Name**.)

HOW TO CREATE A REGISTRATION FORM

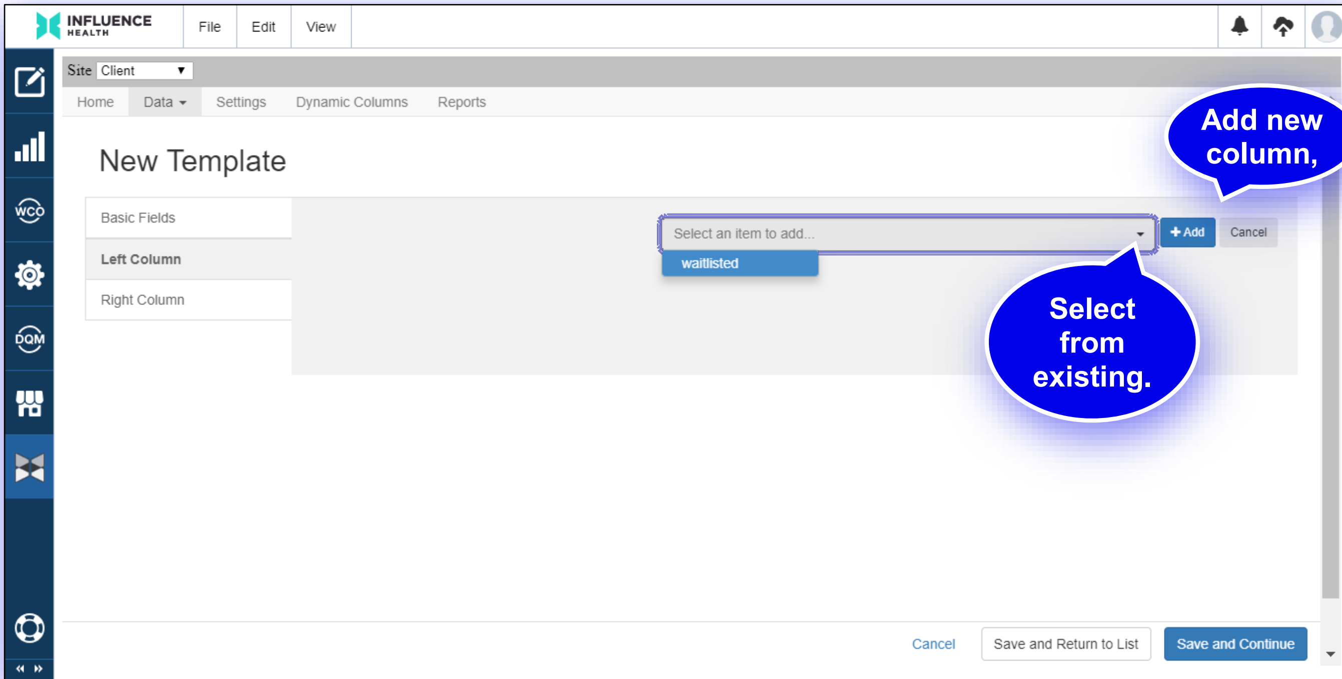
Click the **Create New** button from the lower right of the **Registration Form** screen.

The **New Template** screen displays, as shown below.

Create a **Registration Form** by defining a **Template Name** and building **Left** and **Right Columns**, as shown below.



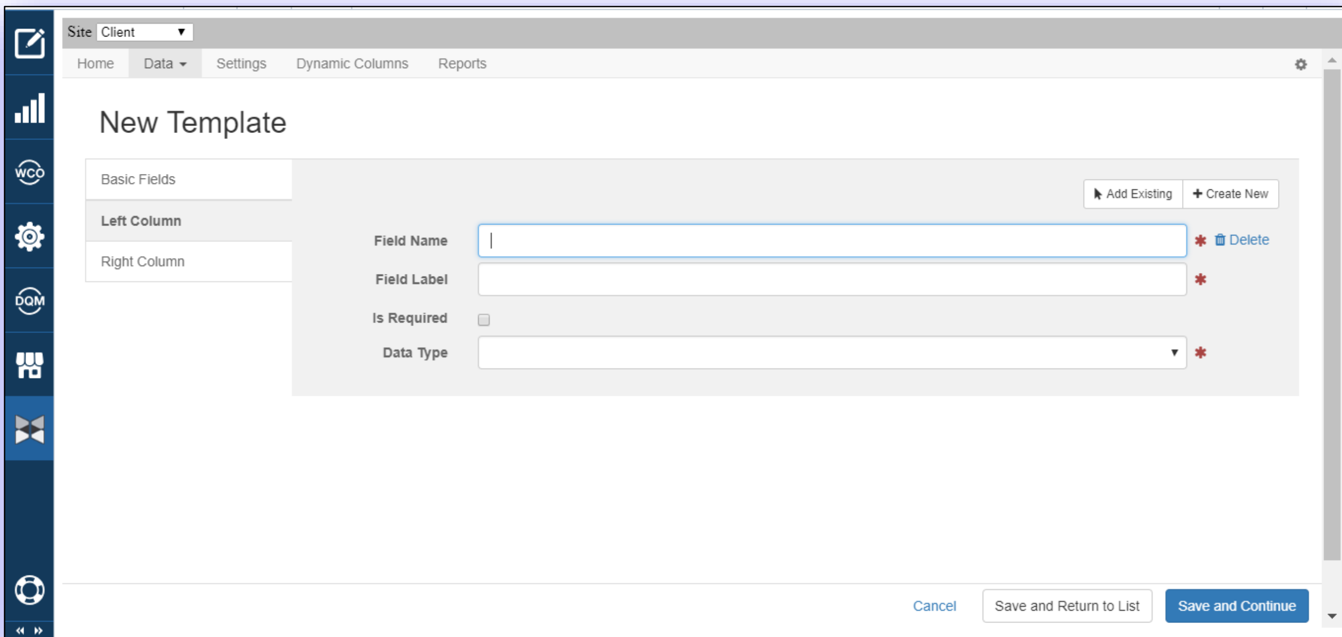
Enter a name for your template in the **Template Name** (*required) field, as shown above. Add columns, using the **Left** and **Right Column** buttons. Below, we clicked the **Left Column** button. You have options to add existing columns or create new ones.



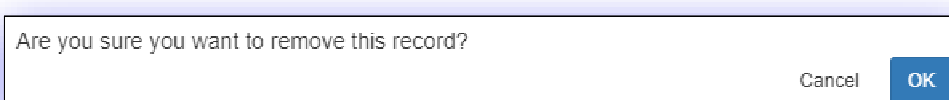
ADDING A NEW LEFT OR RIGHT COLUMN TO YOUR REGISTRANT FORM

Click the **Add** button from the **New Template** screen view (see [How to Create a Registrant Form]) and the screen changes to provide entry fields:

- Field Name (Enter the name of your new column field.) (*required)
- Field Label (Enter the column field label name.) (*required)
- Is Required (Designate whether this is a required field by selecting or deselecting this checkbox.)
- Data Type (Define this field's data type as a *text*, *number*, *date* or *drop-down* field, using the drop-down options.) (*required)

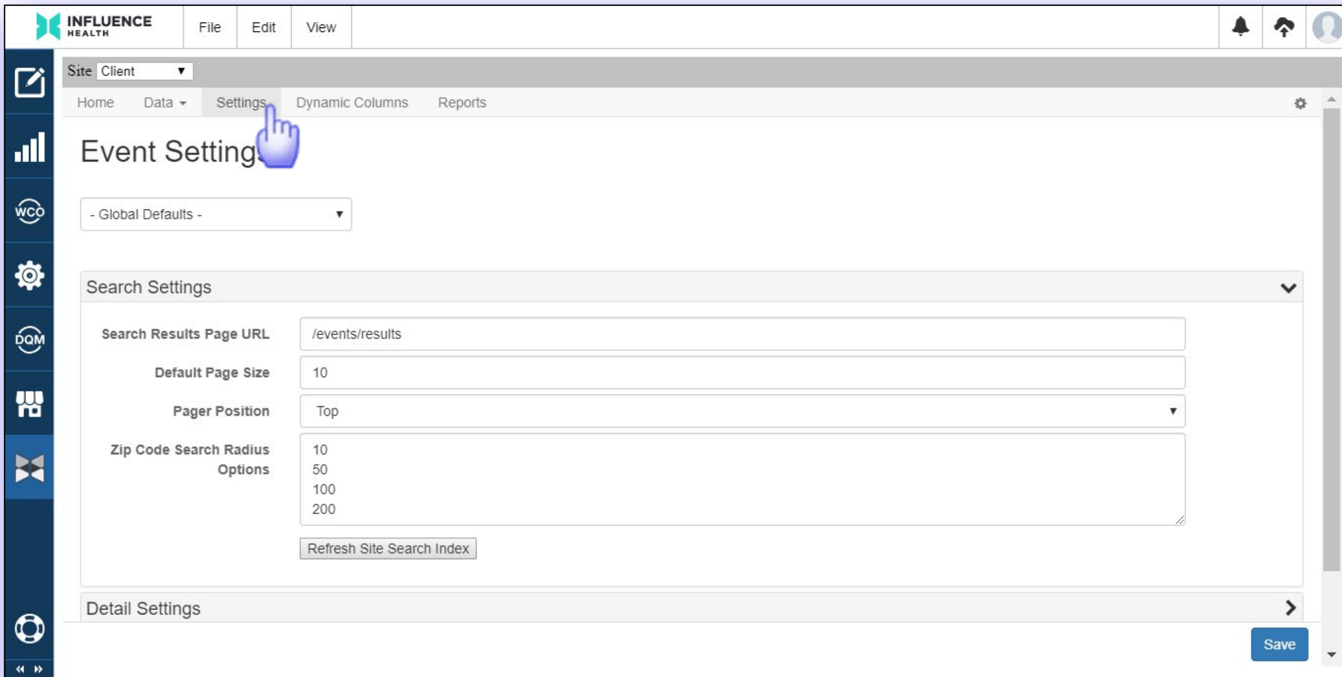


Choose **Cancel** to return to the previous screen without saving any of your changes. Choose **Save** to commit your changes and remain in the **Edit** screen. Choose **Save and Return to the List** to commit your changes and return to the list page. Click the **Delete** button to remove the **Left** or **Right** column, if desired and confirm the deletion in the confirmation message that follows by clicking **Ok**.



SETTINGS

Choose the **Settings** link from the **Content App Events** menu, or from the **Events Settings** tab. The **Event Settings** management page displays.



Search Setting Options on This Page

- **Search Results Page URL** (Enter the URL of the referenced **Search Results** page.)
- **Default Page Size** (Enter the number of results to display from a search (defaults to 10).)
- **Pager Position** (Configure the placement of the pagination feature on the **Search Results** page. Available options are: Top and Bottom, Top, Bottom.)
- **ZIP Code Search Results Radius Options** (Set the default **ZIP Code** search radius (in miles) Options are: 10, 50, 100, 200)
- **Refresh Site Search Index** (Click this button to refresh site search after adding, editing or deleting records.)

Detail Settings Options on This Page

- **Detail Page URL** (This is the full URL to the **Events** public profile page.)
- **Direct URL Path** (Enter the direct URL path of the event.)

The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

SEO Settings Options on This Page

Tokens[1] comprise the formulas that create each element. Consider them as objects. A list of available tokens is provided for each section (see image below). Copy and paste them in the fields in the order the chosen elements should appear, being mindful of syntax.

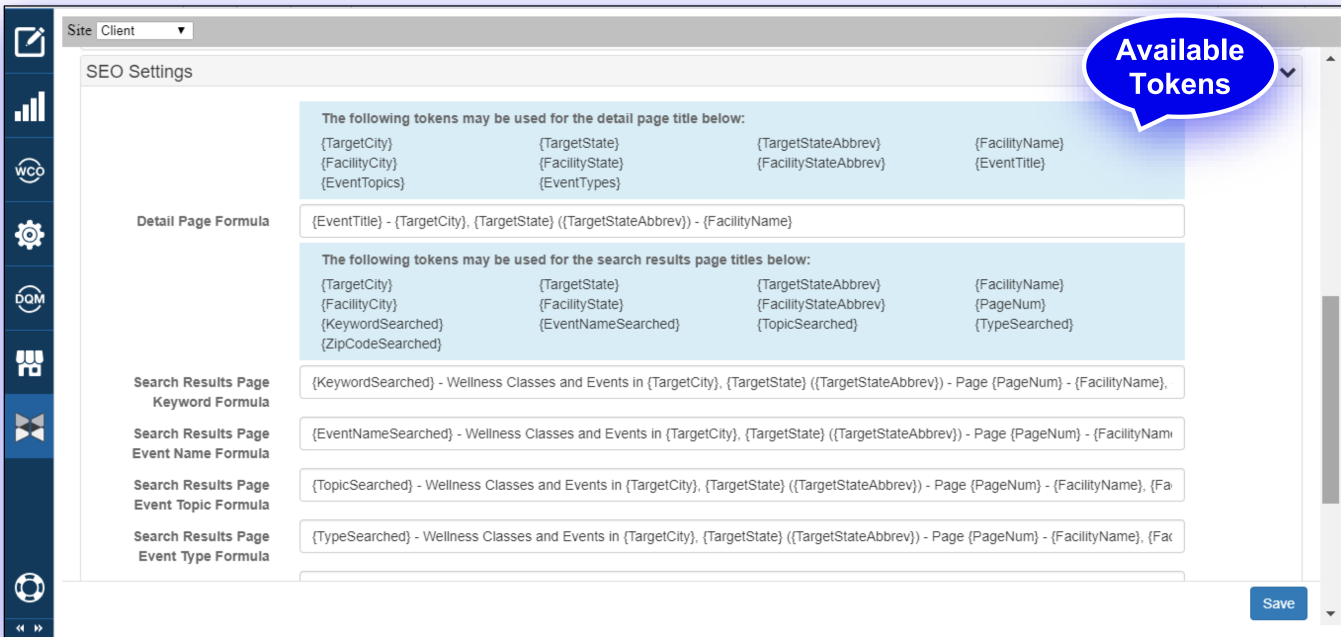
You can also add static (non-dynamic) words around the tokens. The intent is to replace the contents of the token fields on the published page with data referenced from a list.

- **Detail Page Formula** (These tokens form the **Events Detail** page.)
- **Search Results Page Keyword Formula** (This formula comprises the keyword search on the **Events** page, for example: **Find** {**KeywordSearched**} **Wellness Classes** and **Events**, etc.)
- Search Results Page Event Name Formula (This formula comprises the Search Results page Event Name.)
- Search Results Page Event Topic Formula (This formula comprises the Search Results page Event Topic.)
- Search Results Page Event Type Formula (This formula comprises the Search Results page Event Type.)
- **Search Results Page** ZIP **Code Formula** (These tokens comprise the **Events** ZIP search. **For** example, in the field displayed below, we see: **Find Wellness Classes** and **Events** near {ZIP**CodeSearched**} - **Page** {**PageNum**} - {**FacilityName**}, {**FacilityCity**}, {**FacilityState**} ({**FacilityStateAbbrev**}.)

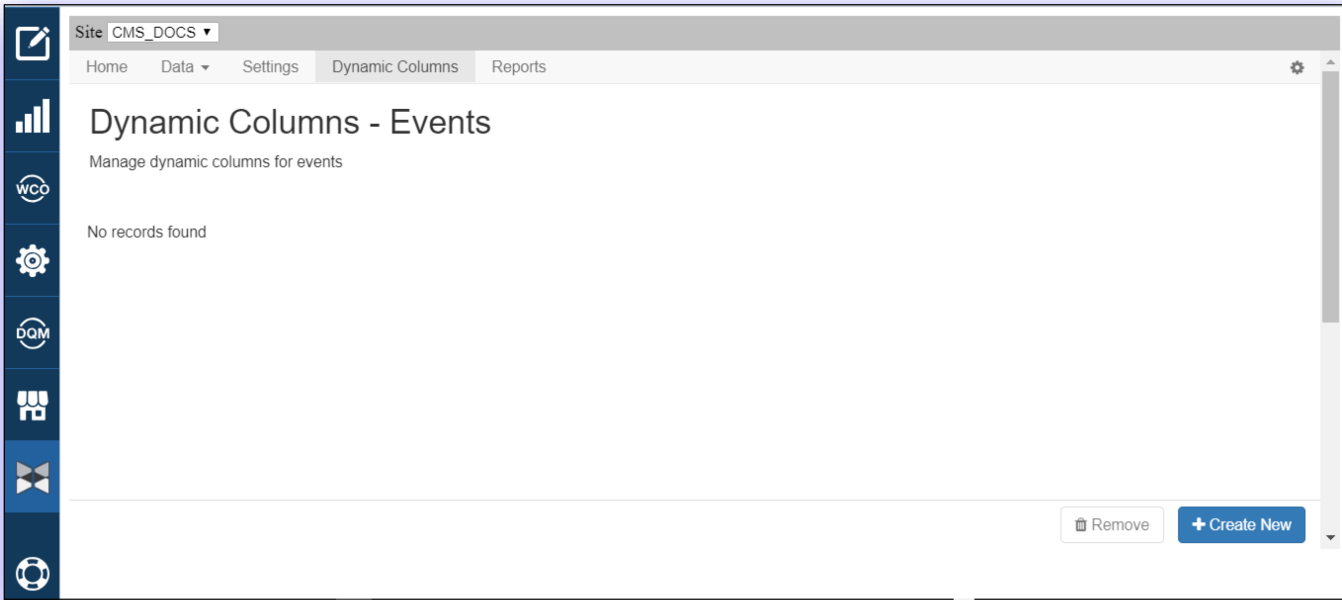
[1] A token, simply stated, is a symbolic representation of a larger piece of data.

- **Search Results Page Base Formula** (This is a standard formula for the page title on search results, for example: Find Wellness Classes and Events in {TargetCity}, {TargetState} ({TargetStateAbbrev}) - Page {PageNum} - {FacilityName}, {FacilityCity}, {FacilityState} ({FacilityStateAbbrev}.)

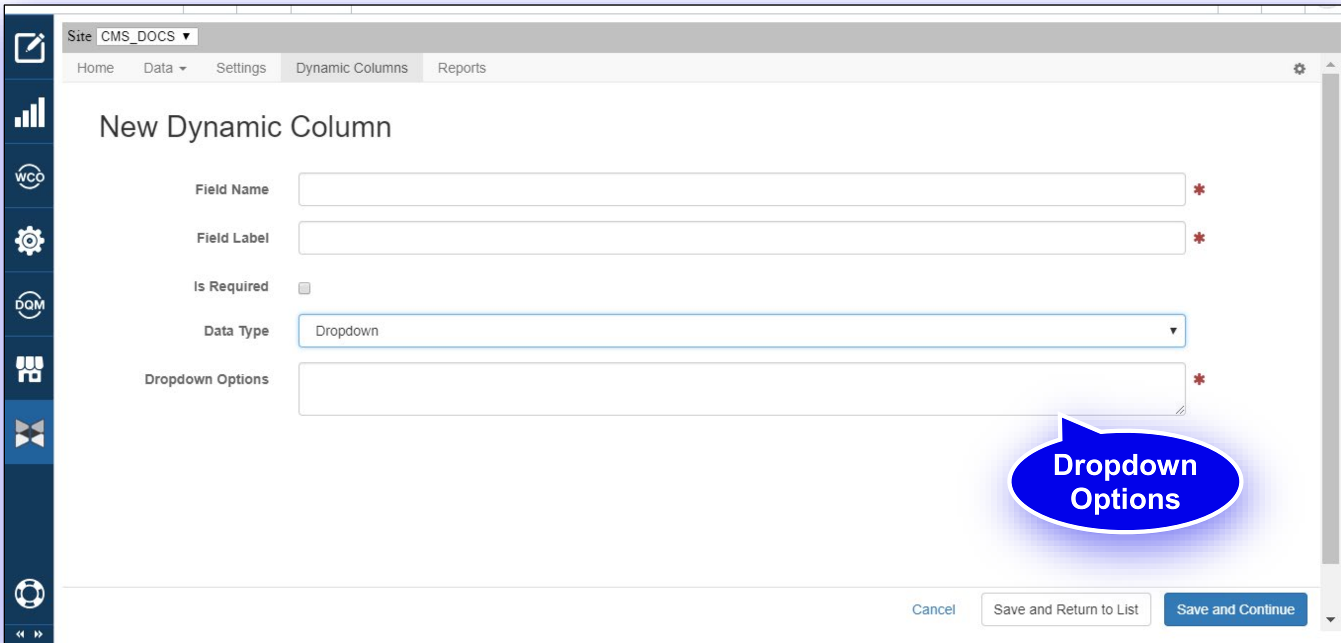
- Below this area are additional entries for your use. Enter these as instructed, to clean up extra or empty separator values in the SEO titles. Use {sp} to denote spaces, as instructed.



DYNAMIC COLUMNS
Choose the **Dynamic Columns** tab from within the **Events Content App**. The **Dynamic Columns – Events** page displays.



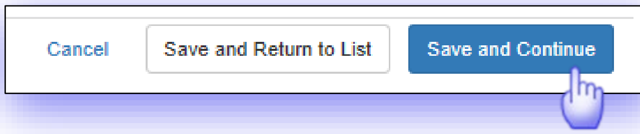
From the **Dynamic Columns – Events** page, you can create custom **Event** detail fields. To create a new field, click the **Create New** button. The **New Dynamic Column** screen displays.



Custom field options in the **New Dynamic Column** screen include the following:

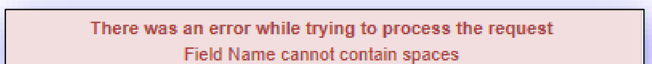
- **Field Name** (This is the name of the custom field.) (*required)
- **Field Label** (This is the name that will display on the published page for the custom field.) (*required)
- **Is Required** (Check this box to indicate that the custom field is required.)
- **Data Type** (This is the type of data that will populate the custom field. Select the data type from this drop down, whether (*Text, Number, Date, Dropdown or Content Editor*).)
- **Max Length** (If **Text** is selected as the **Data Type**, enter the maximum number of characters to be allowed in the custom field.)
- **Is Multiline** (If **Text** is selected as the **Data Type**, check this box to designate the custom field as a multiline entry text box (only available for **Text** data type). Multiline text allows more than one line of text in the resulting text field, where applicable and supports word wrapping, vertical and horizontal scrolling.)
- **Dropdown Options** (A selection of *Dropdown* as the **Data Type** renders this additional contextual configuration field. This field allows free-text entry and comprises the list items of the drop-down field.)

Once you have made your selections and entered any needed information for your custom field, click **Save and Continue**.

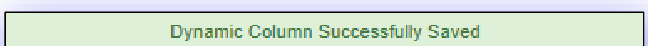


If you have used spaces in the first field: **Field Name**, you will see an error message restricting you from saving your custom field. This will be the name of your custom field in for example: *My_Event.*

Replace any spaces with an underbar to meet this requirement.



If all information has been entered according to the restrictions for each of these fields, a confirmation message displays.



EVENTS REPORTING ENHANCEMENTS

Additional report filters and result columns have been added, as well as new standard reports and instructions on how to use **Event Reporting**. Additional enhancements are categorized below:

.

New headings:

- Two new headings have been added to classify report fields: **Event** and **Occurrence**.

Renamed:

- **Status** has been renamed to **Event Status.**
- **Publish Date** has been renamed to **Event Publish Date.**
- **Unpublish Date** has been renamed to **Event Unpublish Date.**
- **Location** has been renamed to **Event Location.**
- **Contact Name** has been renamed to **Occurrence Contact Name.**
- **Presenter** has been renamed to **Occurrence Presenter.**
- **Sponsoring Location** has been renamed to **Occurrence/Sponsoring Location.**
- **Registration Start Date** has been renamed to **Occurrence Registration Start Date.**
- **Registration End Date** has been renamed to **Occurrence Registration End Date.**

New filter options:

- **Event Title** (drop-down)
- **Event Location** (drop-down)
- **Event ID**
- **Occurrence Custom Location** (textbox)
- **Occurrence Cost Center**
- **Occurrence ID**
- **Occurrence Status**

New **Available** (**Results**) field options:

- **Event ID** (This ID is system-generated when the **Event** is created.)
- **Event Status** (This is the event status, whether *All, Enabled* or *Disabled*.)
- **Event Seats Available** (This is the number of event seats that are available.)
- **Occurrence Custom Location** (This is the location where the custom event occurrence will be/was held.)
- **Occurrence Cost Center** (This is the name of the department or other type of unit within your organization to which costs may be charged for the event occurrence, for accounting purposes.)
- **Occurrence Seats Available** (This is the number of event occurrence seats that are available.)
- **Occurrence ID** (This ID is system-generated when the **Event Occurrence** is created.)
- **Occurrence Status** (This is the event occurrence status, whether *All, Enabled* or *Disabled*.)
- **Occurrence Business Unit ID** (This ID is system-generated when the **Event Occurrence** is created.)

The following has been removed from the **Available** (**Results**) field options:

- **Registrantdiscountcode**

Other enhancements:

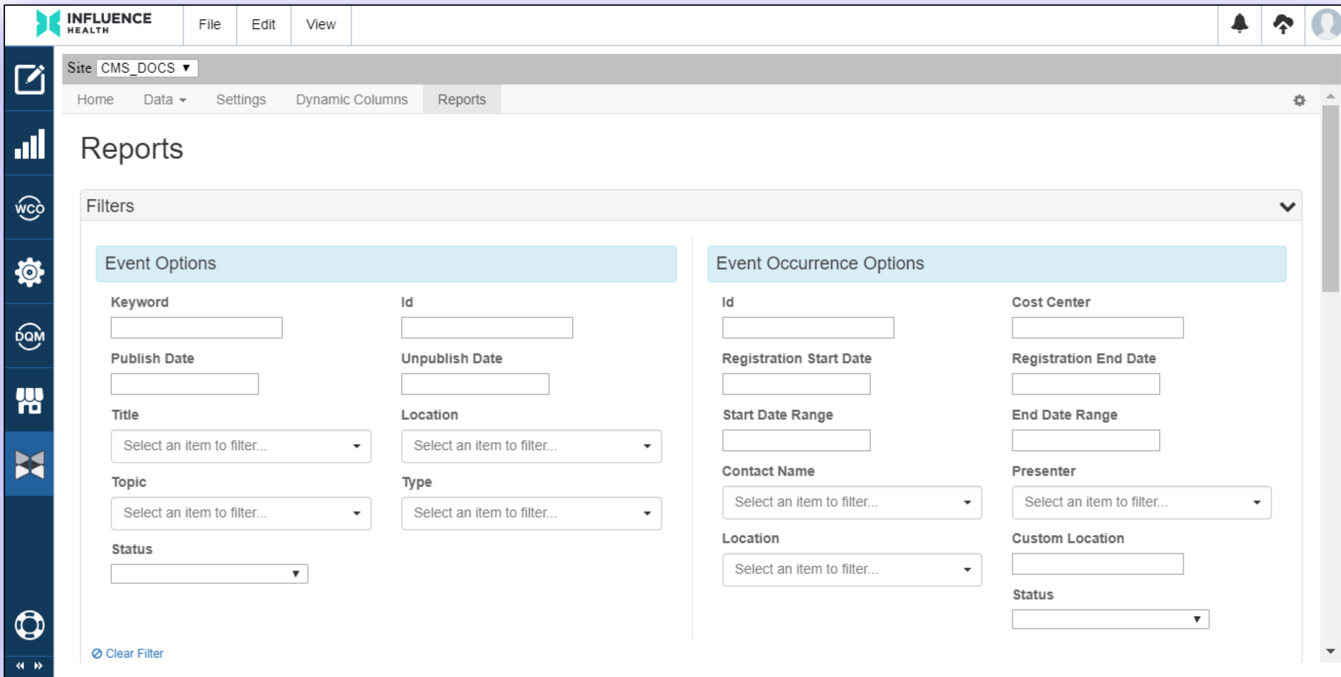
- **Filter Criteria** are now grouped together: **(Events | Occurrences).**
- Six new standard out-of-the-box reports are now available.
- Report data is now validated.
- Document reporting functionality has been modified, by adding and removing available field options for the report, affecting how the data is filtered.

Other modifications:

- **Amount Paid** now has two decimal places, instead of four.
- The
 tags within the **Address field** have been removed.

REPORTS

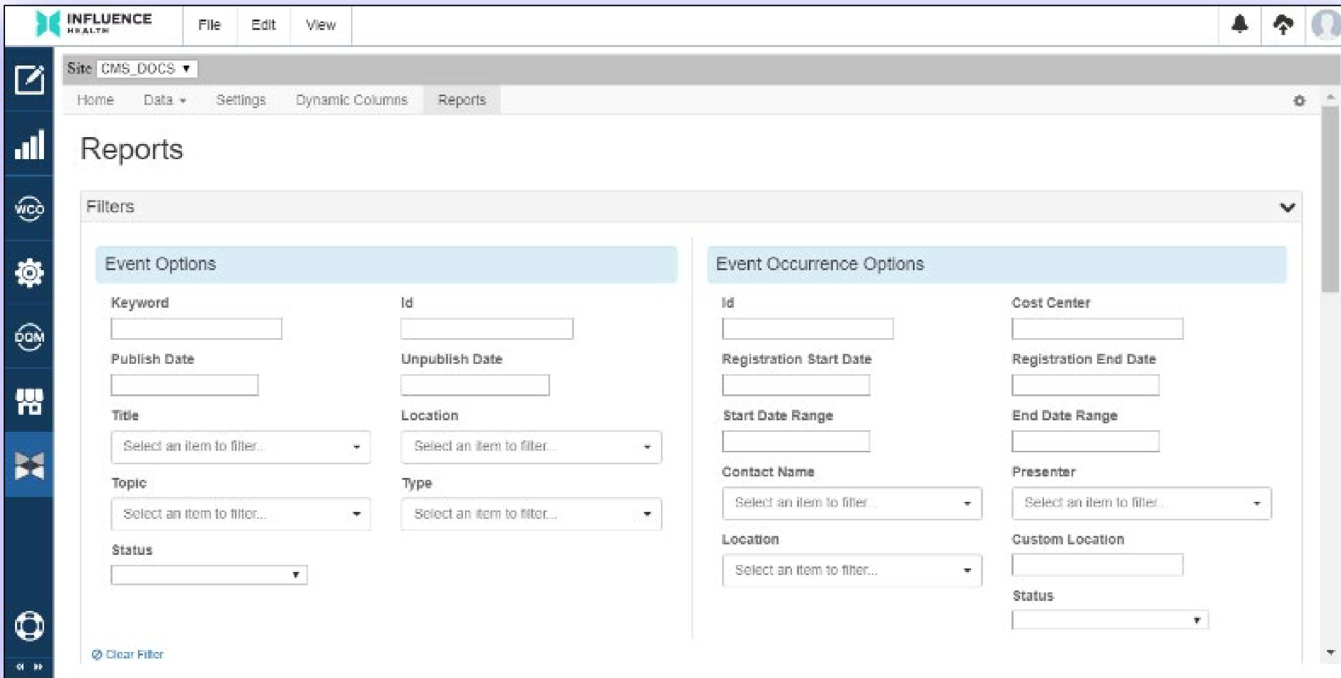
Events includes several reporting features. Choose the **Reports** tab from within the **Events Content App**. The **Reports** page displays.



From the **Reports** page, you can search for **Event** reports, run existing event reports or create new **Event** reports, with options to **Run Report** or **Clear Filter**.

Report Search/Filter Options

The report filters are searchable from filters in two major categories**: Event Options** and **Event Occurrence Options**.



Enter Your Criteria Using the Event Options

- **Keyword** (Enter a keyword on which to search for a report.)
- **ID** (This ID is system-generated when the event is created.)
- **Publish Date** (Begin typing in this date field to enter the **Publish Date**. The calendar widget displays for formatted selection.)
- **Unpublish Date** (Begin typing in this date field to enter the **Unpublish Date**. The calendar widget displays for formatted selection. This is the date when event content was removed from view.)
- **Title** (This is the event title.)
- **Location** (Enter the event location in the free-text field.)
- **Topic** (Select from **Event Topic** drop-down options, 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*)

- **Type** (Choose a report type from the drop-down options, listing topics such as: Childbirth Education, Class, Fair or Health Fair, Free, Health Education, Online Class, Online Gift Shop, Screening, Seminar and Webinar)
- **Status** (Make a selection from the drop-down: *(All, Enabled, Disabled)*

Event Occurrence Options

- **ID** (This ID is system-generated when the **Event** occurrence is created.)
- **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 Start Date** (Begin typing in this date field to enter the **Registration Start Date**. The calendar widget displays for formatted selection.)
- **Registration End Date** (Begin typing in this date field to enter the **Registration End Date**. The calendar widget displays for formatted selection.)
- **Start Date Range** (Begin typing in this date field to enter the **Start Date Range**. The calendar widget displays for formatted selection.)
- **End Date Range** (Begin typing in this date field to enter the **End Date Range**. The calendar widget displays for formatted selection.)
- **Contact Name** (Select a contact name from the populated list.)
- **Presenter** (Select a name from the populated list.)
- **Location** (Select a location from the populated list.)
- **Custom Location** (Type in a location in this free-text field.)
- **Status** (Make a selection from the drop-down. Options are: (*All, Canceled, Active, Disabled or Expired*.)

Note:

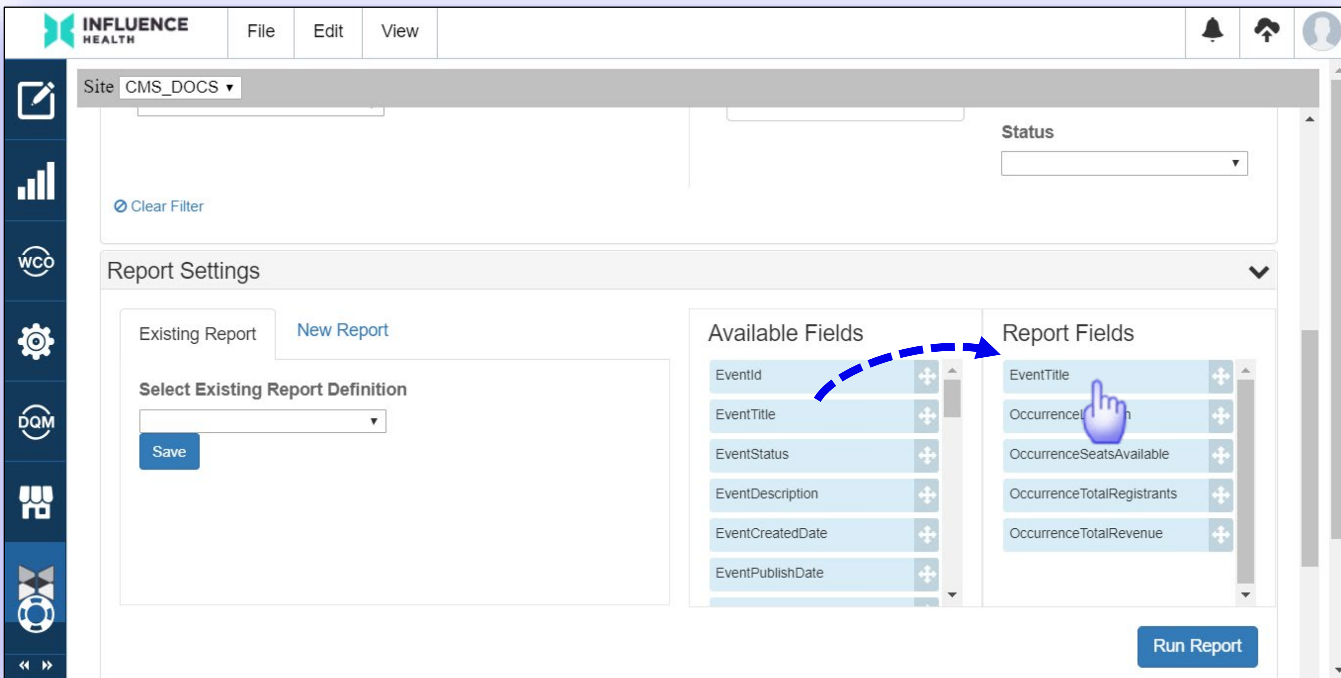
The Event Occurrence Start Date and Event Occurrence Location are now sent to ULM when event registrations are captured. If a custom location is used on an event occurrence, the custom location is sent as the event occurrence location.

REPORT SETTINGS

The **Report Settings** section of this tab includes options to run **Existing Reports** or create **New Reports**.

To Run an Existing Report

Click the **Existing Report** tab, choose an existing report definition from the **Select Existing Report Definition** drop-down list and click the **Run Report** button. You can modify the report, by dragging fields into the **Report Fields** area from the **Available Fields** pane, and clicking **Run Report**. Save your modifications by clicking the **Save** button.



Available Fields

- **EventId ID** (This ID is system-generated when the report is created.)
- **EventTitle** (This is the title of the event)
- **EventStatus** (This is the event status, whether *All, Enabled* or *Disabled*.)
- **EventDescription** (This is the description of the event that was entered on creation.)
- **EventCreatedDate** (This is the date on which the event was created.)
- **EventPublishDate** (This is the date on which the event was published.)
- **EventLocation** (This is the location where the event will be / was held.)
- **EventTotalRevenue** (This is the total revenue for the event.)

- **EventTotalRegistrants** (This is the total number of event registrants.)
- **EventSeatsAvailable** (This is the number of event seats that are available.)
- **EventBusinessUnitId** (This is the business unit ID that was entered when the event was created.)
- **OccurrenceId[1]** (This is the system-generated event occurrence ID.)
- **OccurrenceStatus** (This is the status of the event occurrence, whether All, Enabled or Disabled.)
- **OccurrenceContactName** (This is the contact name that was entered for the event occurrence.)
- **OccurrenceContactPhone** (This is the contact phone number that was entered for the event occurrence.)
- **OccurrenceContactEmail** (This is the contact email address that was entered for the event occurrence.)
- **OccurrenceCostCenter** (This is the name of the department or other type of unit within your organization to which costs may be charged, for accounting purposes.)
- **OccurrenceStartDate** (This is the event occurrence start date.)
- **OccurrenceIsEnabled** (This is the On state of the event occurrence status: Enabled.)
- **OccurrencePresenter** (This is the entered event occurrence presenter.)
- **OccurrenceLocation** (This is the location of the event occurrence.)
- **OccurrenceCustomLocation** (This is the event occurrence custom location.)
- **OccurrenceCapacity** (This is the seating capacity of the event occurrence. How many attendees can be accommodated at this location?)
- **OccurrenceSeatsAvailable** (This is the number of event occurrence seats available.)
- **OccurrenceTotalRevenue** (This is the total revenue from the event occurrence.)
- **OccurrenceTotalRegistrants** (This is the total number of event occurrence registrants.)
- **RegistrantName** (This is the event occurrence registrant name.)
- **RegistrantAddress** (This is the event occurrence registrant address.)
- **RegistrantEmail** (This is the event occurrence registrant email address.)
- **RegistrantPhone** (This is the event occurrence registrant phone number.)
- **RegistrantDateRegistered** (This is the date the registrant registered for the event occurrence.)
- **RegistrantAmountPaid** (This is the amount the registrant paid for the event occurrence.)
- **RegistrantTransactionId** (This is the system-generated transaction ID that was created, when the registrant paid for the event occurrence.)
- **RegistrantAttended** (This field indicates whether the registrant attended the event occurrence.)
- **RegistrantNotes** (This field holds the notes regarding the registrant that were entered in the Event Registrant Edit Screen.)

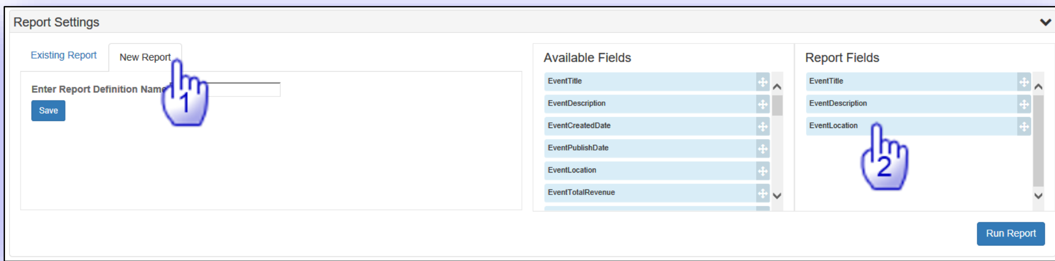
Custom Event Registration Fields

New custom **Event Registration** fields are now listed under **Available Fields** for **Event Reports**, easily identifiable by the presence of the word, *Custom* at the beginning of the field name.

- **CustomCardioNewsletter**
- **Customwaitlisted**
- **Customdate_of_birth**
- **CustomFoodChoice**
- **CustomInsurance**
- **CustomEvent Title**

HOW TO CREATE A NEW EVENT REPORT

To create a new **Event** report, click the **New Report** tab, enter your new report name into the **Enter Report Definition Name** free-text field, then drag and drop the desired report fields from the **Available Fields** pane into the **Report Fields** pane, as shown in the [Report Settings](#) topic.



Tip:

Once the fields are in the Report Fields column, you can also rearrange them using the drag and drop functionality.

THE PROVIDERS CONTENT APP

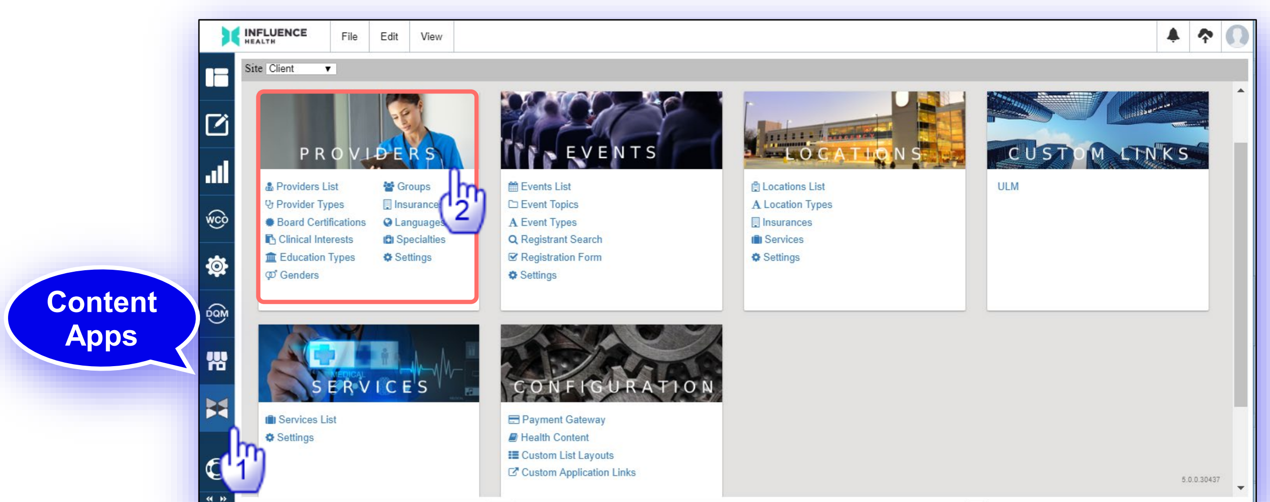
The published **Providers Content App** allows consumers to search for providers who are associated with a health care organization. Provider profiles, including content, can be customized based on the health care organization's preferences and include the following.

- **Philosophy of Care**
- **Bio**
- **Specialty**
- **Locations**
- **Contact Information**
- **Provider Photo**
- **Appointment Requests**

HOW TO ACCESS THE PROVIDER LIST

Access the **Providers Content App** via the **Content Apps** console. To access **Content App** components from anywhere within CMS, click the **Content Apps** option from within the **Apps** left menu. Click the **Provider List** link from the **Providers** menu.

From the **Content Apps** console, you can manage **Providers**, **Events**, **Locations**, **Services** and other configuration items. Each content app has its own menu of management items. The **Providers** content app, identified in red below, provides a search (filter) and the ability to edit or remove existing provider records, as well as to create new records. Click either the **Providers** image or the **Providers List** link.



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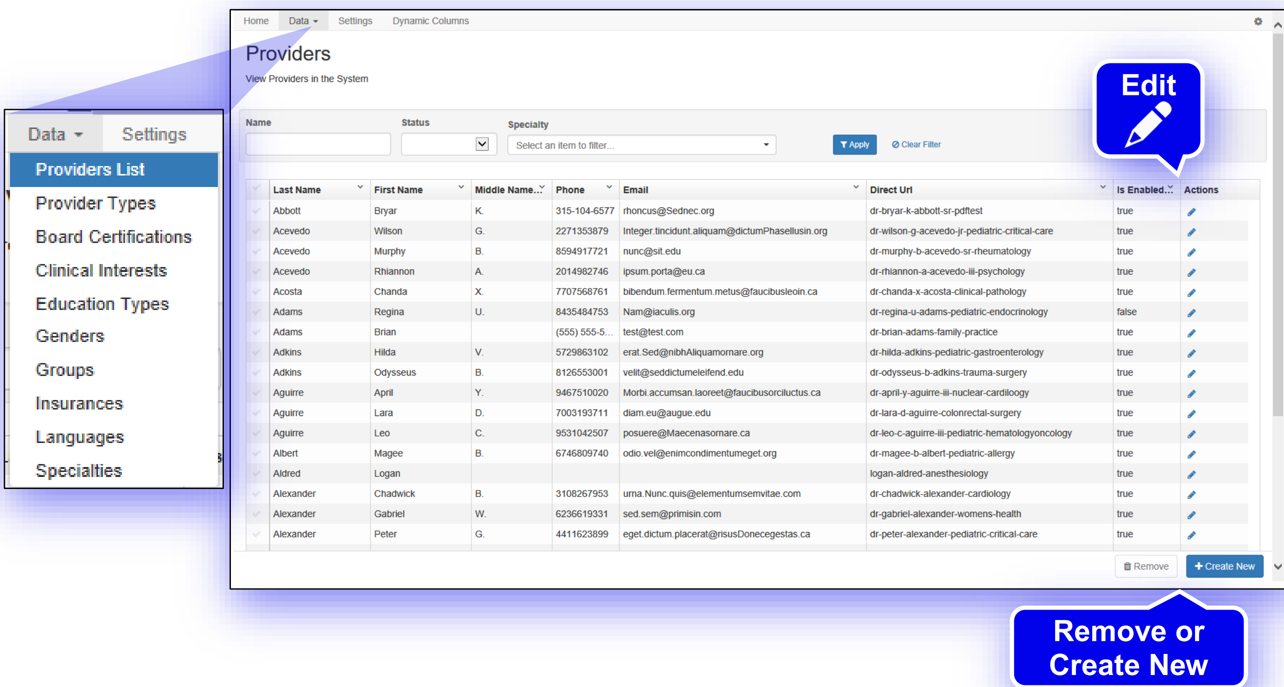
SEARCHING FOR PROVIDERS

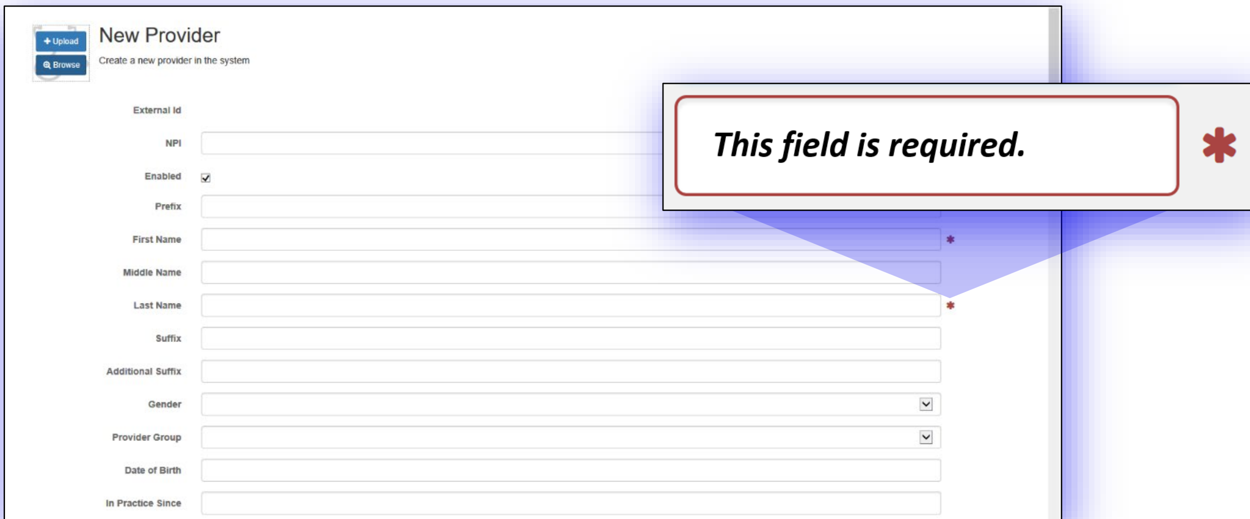
The **Providers** page displays. This page can also be accessed from the **Data** tab drop-down menu option of the at the top of the screen. From the **Providers** page, you can perform the following actions:

- Search for a provider record by **Name**, **Status** *(All, Enabled, Disabled)* and/or **Specialty**.
- **Create New** provider records.
- **Edit** provider records.
- **Remove** provider records.

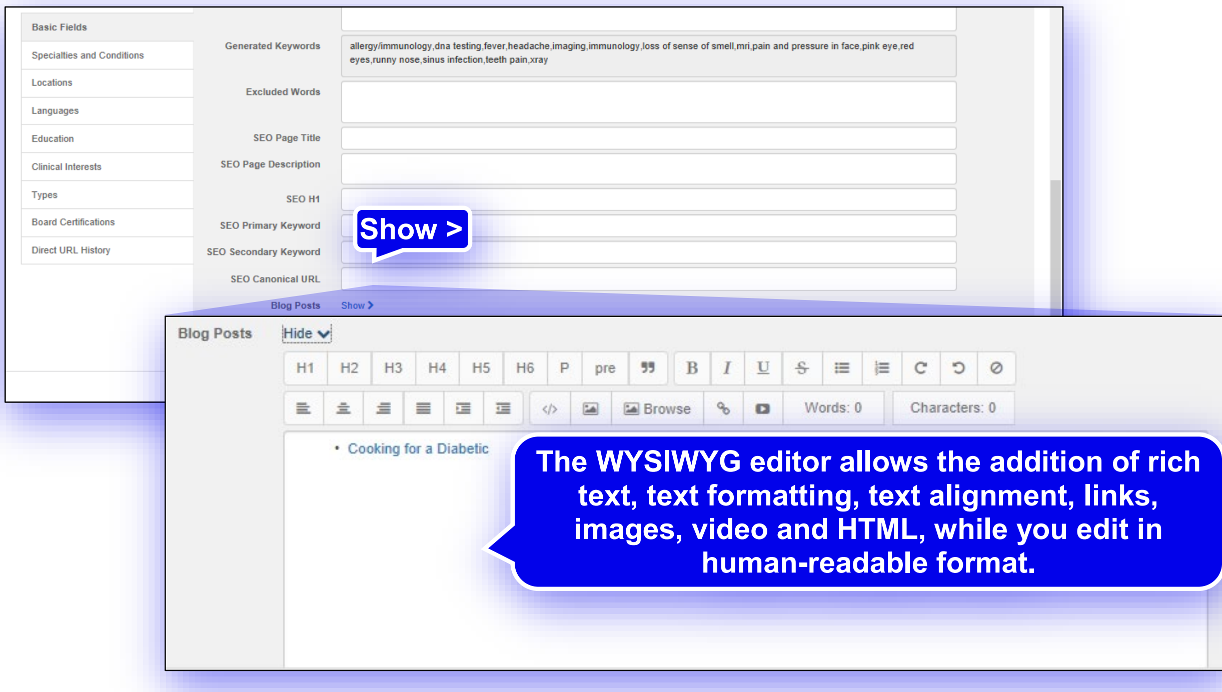


HOW TO CREATE A NEW PROVIDER

Clicking the **Create New** button from the lower right of the **Providers** page, opens the **New Provider** page. A red asterisk indicates that a field is required.



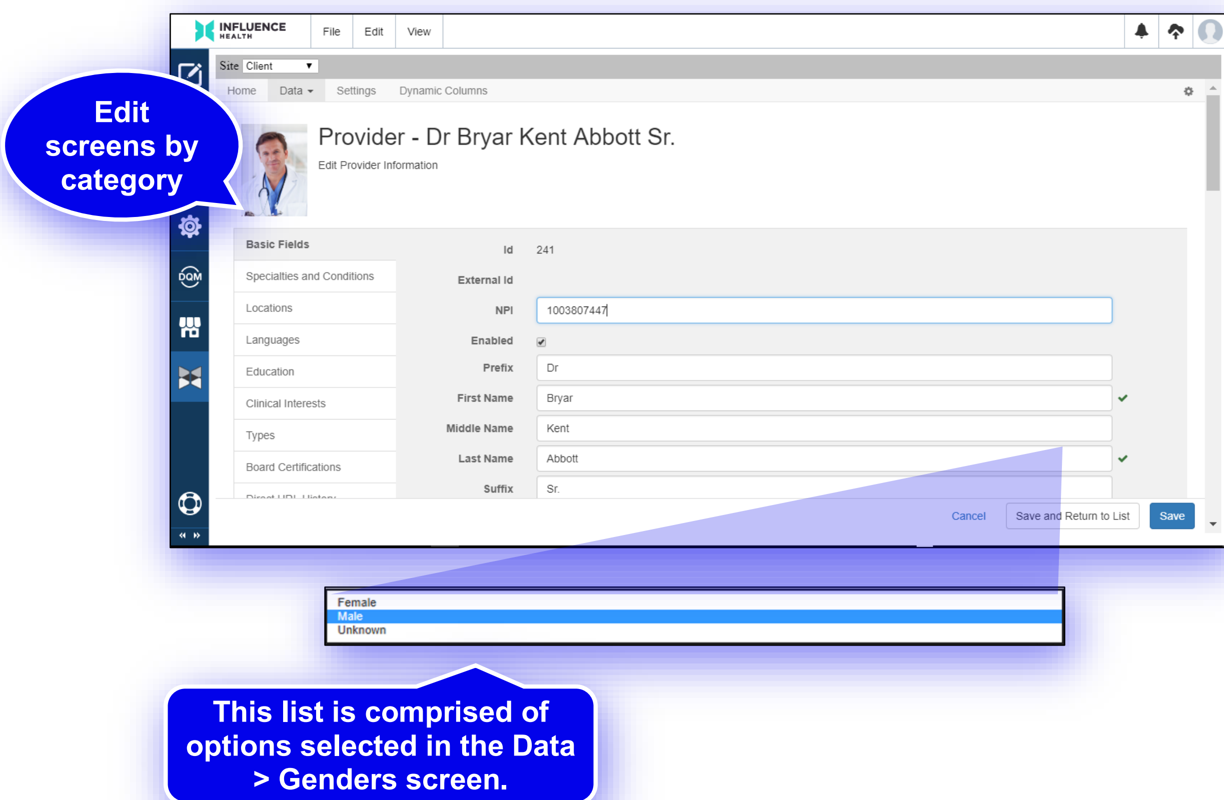
Scroll to the bottom of the page (image, below). The **Show >** link can be clicked on any applicable field to reveal a **WYSIWYG** editor. This is a field of the type, *Content Editor*.



HOW TO EDIT PROVIDERS

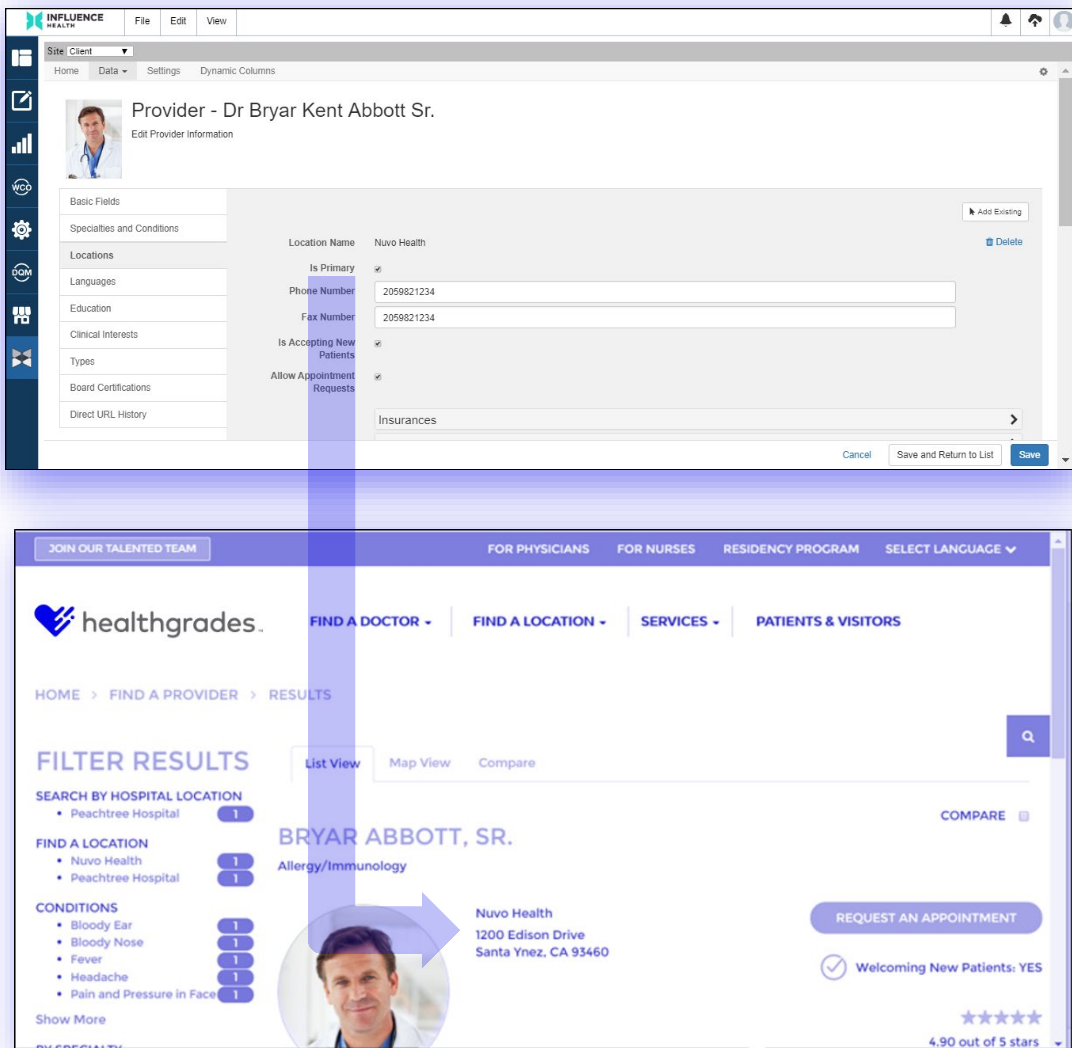
From the **Providers** page, click the **Edit** pencil icon for a record to revise information. The main (**Basic Fields**) screen displays. You can also navigate quickly to other available edit screens by topic, by clicking one of the selections from the left panel. **Basic Fields** allow you to add information for your provider by category. A checkmark on the right of a field indicates that the field is required. **Basic Fields** are as follows:

- **Specialties and Conditions**
- **Locations**
- **Languages**
- **Education**
- **Clinical Interests**
- **Types**
- **Board Certifications**
- **Direct URL History**



HOW TO ADD AND EDIT LOCATION CONTENT

This screen builds the **Location** content for the **Provider Profile** page. The fields of this screen are detailed below. The provider's designated **Primary Location** is displayed at the top of the list on the public-facing detail page. Any additional locations are listed alphabetically beneath the primary location.



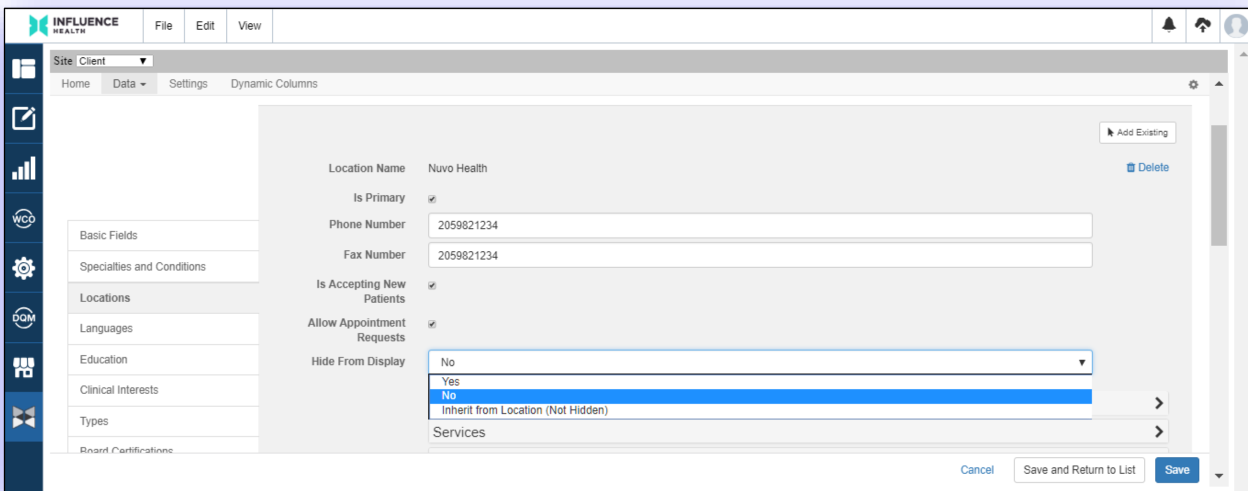
Provider Profile Location Fields

- **Location Name** (This is the read-only display name of the location. To add an additional location, use the **Add** button and drop-down menu at the top-right of the page. To delete the location, use the **Delete** button from the same area and confirm your selection.)
- **Is Primary** (Check this box to designate this location as primary. The **Primary Location** is listed first on the **Provider Profile** page.)
- **Phone Number** (Enter the phone number to be used for this location.)
- **Fax Number** (Enter the fax number to be used for this location, if applicable)
- **Is Accepting New Patients** (Check this box if the provider is actively accepting new patients.)
- **Allow Appointment Requests** (Check this box to indicate that the provider allows appointment requests.)
- **Hide from Display** (Select the desired option from this drop-down field. Options are: (*No, Yes or Inherit from Location (Not Hidden)*).)
- **Insurances** (Expand this panel and use the drop-down list to select and display accepted insurances for this location. Click an insurance name from the list to highlight it and use the **Add Existing** button to add the insurance to the list of accepted insurances. Remove an insurance name from the list using the **Delete** button for that row and confirm your action in the box that displays.)
- **Services** (Expand this panel and use the drop-down list to select and display the services provided at this location. Click a service name from the list to highlight it and use the **Add Existing** button to add the service to the list of provided services. Remove a service name from the list using the **Delete** button for that row and confirm your action in the box that displays.)
- **Hours** (Expand this panel and click the Create New button to configure hours of operation for the location by **Day**, **Open Time** and **Close Time**. Remove hours from the list using the **Delete** button for that row and confirm your action in the box that displays.)

How to Exclude Specific Locations from Displaying on Provider List and Provider Detail Pages

Admins can now exclude specific locations from displaying on **Provider List** and **Provider Detail** pages. From **Content Apps** > **Providers List**, select the **Edit** (pencil) icon for your provider. In the edit screen that displays, under the **Location** tab, select the desired option from the **Hide from Display** drop-down field, whether *No*, *Yes* or *Inherit from Location* (Not Hidden).

The **Location** and **Provider APIs** have also been updated with these new settings.



Note:

If this configuration is enabled on a specific Location record, that location will be inherited at the provider level. That location will be excluded from displaying on the list and detail pages for all providers that are associated to that location, if it is not the provider's primary location.

Locations that are configured to be hidden can be overridden within the individual provider record's configuration.

If this configuration is enabled on a specific Provider record, that location will be excluded from displaying on the list and detail pages for that specific provider, if it is not the provider's primary location.

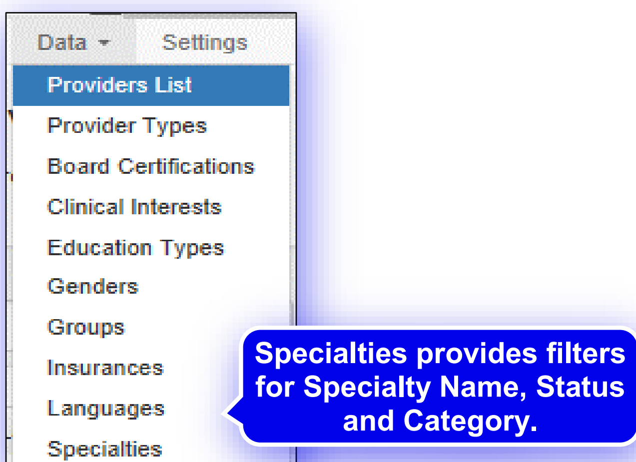
Any location that is flagged as a Primary Location cannot be hidden.

THE DATA TAB DROP-DOWN MENU

The options that are available under the top **Data** tab drop down we displayed earlier, allow you to search, sort, add, edit or remove provider-related list data. They are:

- Providers List (Listed by: Last Name, First Name, Middle Name, Phone, Email, Direct List, Is Enabled*,* search by Name, Status *(All, Enabled, Disabled) and* Specialty*.*)
- **Provider Types** (Listed by: **Name** (Doctor, Facility, Nurse Practitioner, Professor, Researcher)**, Is Enabled, ID**, search by **Status** (All, Enabled, Disabled).
- **Board Certifications** (Listed by: **Name** (AAPS, ABMX, ABPS, AMA, ADA, ADABS, Orthopedic Surgery)**, Is Enabled, ID**, search by **Status** (All, Enabled, Disabled).
- **Clinical Interests** (Listed by: **Name** (Adult reconstruction of the hip and knee, Arthritis of the hand, shoulder, and elbow, Arthroscopy of the wrist, elbow, and shoulder, Cardiology, etc.)**, Is Enabled, ID**, search by **Status** (All, Enabled, Disabled).
- **Education Types** (Listed by: **Name** (B. S. N - Bachelor of Science in Nursing, D. C. M. **-** Doctor of Chiropractic Medicine, etc.)**, Is Enabled, ID**, search by **Status** (All, Enabled, Disabled.)
- **Genders** *(*Listed by: **Name** (*Female, Male, Unknown.*), **Is Enabled, ID***,* search by **Status** *(All, Enabled, Disabled.*)
- **Groups** (Listed by: **Name** (Preferred, In Network, Out of Network or None), **Is Enabled, ID**, search by **Status** (All, Enabled, Disabled.)
- **Insurances** *(*Listed by: **Name**, **Is Enabled, ID***,* search by **Status** *(All, Enabled, Disabled.*)
- **Languages** *(*Listed by: **Name**, **Is Enabled, ID***,* search by **Status** *(All, Enabled, Disabled.*)
- **Specialties** *(*Listed by: **Name** (*Allergies, Immunology/Anesthesiology*, etc.), **Is Enabled, ID***,* search by **Status** *(All, Enabled, Disabled.*)

Each **Data** page option contains a filter to assist with locating records by **Status** *(All, Enabled, Disabled).*



Note:

Configurations in the screens of each of these data options appear as lists in a provider's record.

Genders Screen Example

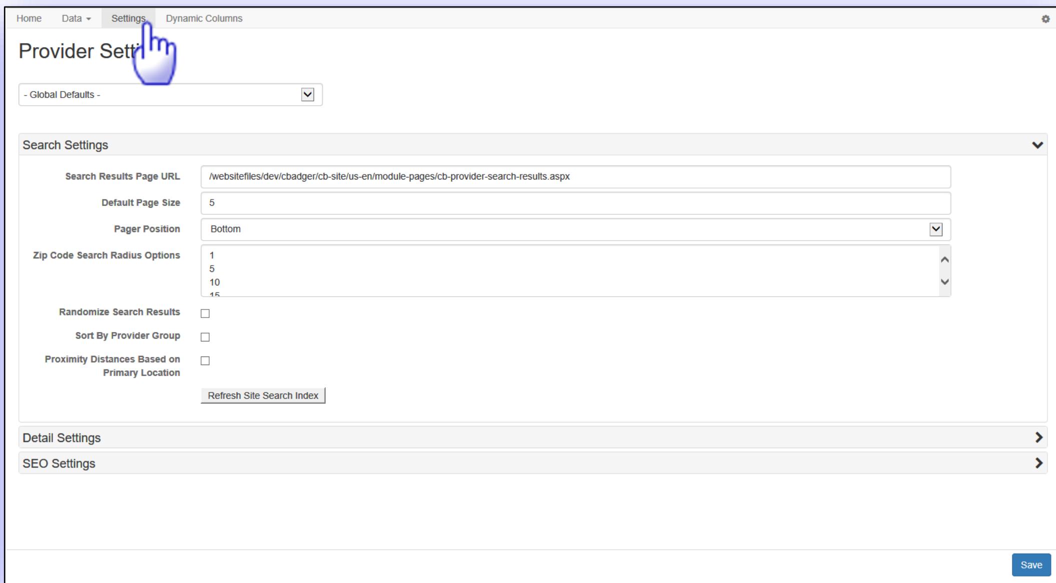
Click the **Data** menu from the top bar and select **Genders** to view or configure options for the **Gender** drop down list options in the **New Provider** and **Edit Provider** screens.

healthgrades

THE PROVIDER SETTINGS SCREEN

The **Provider Settings** screen provides configuration options for **Search Settings**, **Detail Settings** and **SEO Settings** that are related to the **Providers** content app.

Choose the **Settings** link from the **Providers** content app menu, or from the top **Provider** menu bar, as shown below. The **Provider Settings** management page displays.



From here you can configure **Provider Search Settings** for the following:

- Search Results Page URL (This is the URL of the Providers Search Results (list) page.)
- **Default Page Size** (This is the number of results that will display on the **Search Results** page.)
- **Pager Position** (Configure the placement of the pagination feature on the **Search Results** page. Available options are: *Top and Bottom, Top, Bottom.*)
- ZIP Code Search Results Radius Options (Set the default ZIP Code search radius (in miles).)
- **Randomize Search Results** (Check this checkbox to enable random search results to be returned.)
- **Sort by Provider Group** (Check this checkbox to return search results sorted by provider group.)
- **Proximity Distances Based on Primary Location** (Check this checkbox to display the distance to the various primary locations within the search results.)
- **Refresh Site Search Index** (Click this button to refresh the site search index after adding, editing or deleting records.)

-
- **Configure Provide**r **Detail Settings**
- **Detail Page UR**L (This is the full URL to the provider's public profile page.)
- **Direct URL Path** (This is the relative [2]path to the provider's public profile page.)

The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

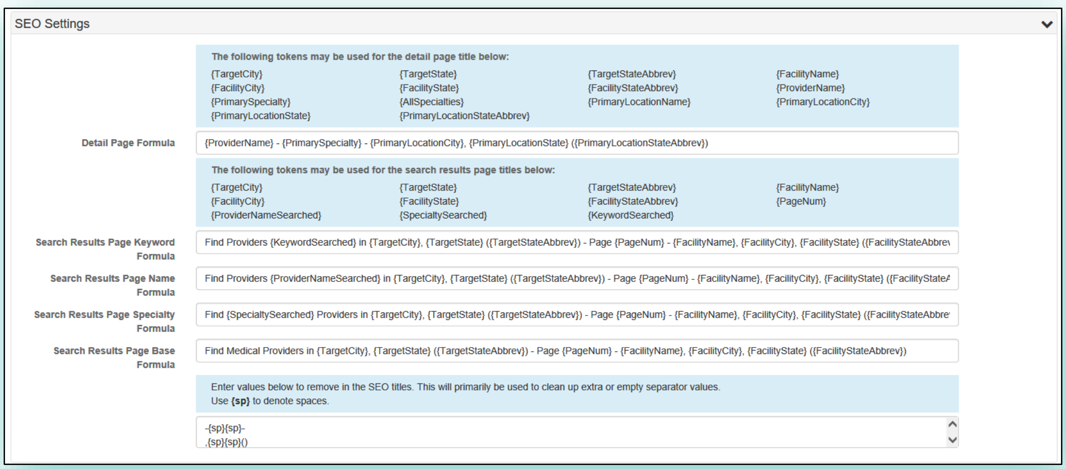
- **SEO Settings**
- **Tokens**[3] comprise the formulas that create each element. Consider them as objects. A list of available tokens is provided for each section. Copy and paste them in the fields in the order the chosen elements should appear, being mindful of syntax.
  You can also add static (non-dynamic) words around the tokens. The intent is to replace the contents of the token fields on the published page with data referenced from a list.
- **Configure Provider SEO Settings**
- **Detail Page Formula** (These tokens form the smart title that is displayed on the **Provider** detail page, for example: {ProviderName} - {PrimarySpecialty} - {PrimaryLocationCity}, {PrimaryLocationState} ({PrimaryLocationStateAbbrev}, or Dr. M. Welby, Internal Medicine, Birmingham, Alabama, AL))
- **Search Results Page Keyword Formula** (This formula comprises the keyword search on the **Provider** page, for example: Find {KeywordSearched}, etc.)
- **Search Results Page Name Formula** (This formula comprises the search results page name for searches on provider name, for example: Find Providers {ProviderNameSearched} in {TargetCity}, {TargetState} ({TargetStateAbbrev}) - Page {PageNum} - {FacilityName}, etc.))
- **Search Results Page Specialty Formula** (This formula comprises the search results page title for searches on specialties, for example: Find {SpecialtySearched} Providers in {TargetCity}, {TargetState} ({TargetStateAbbrev}) - Page {PageNum} - {FacilityName}, etc.)
- **Search Results Page Base Formula** (This is the standard formula for the page title on search results.

[2] A relative path defines the location of a directory in relation to another directory, only including the portion of the URL that describes the difference. For example, if a local Word document is in C:\Sample\Documents\local.docx and the index is in C:\Sample\Index.html, the relative path from the Index.html would be \Documents\local.docx, whereas the absolute path would be C:\Sample\Documents\local.docx, or the entire path.
[3] A token, simply stated, is a symbolic representation of a larger piece of data.

Provider Name Settings

Scroll further down in the screen, and below this area is **Provider Name Settings**. This allows you to determine how to display providers' names in search results. You can determine how providers' names display on detail and list pages while configuring those pages. Tokens that may be used for the custom display of **Provider** names are listed on the screen to guide you:

- **{Nameprefix}**
- **{Firstname}**
- **{Middlename}**
- **{Lastname}**
- **{Namesuffix}**
- **{Additionalsuffix}**

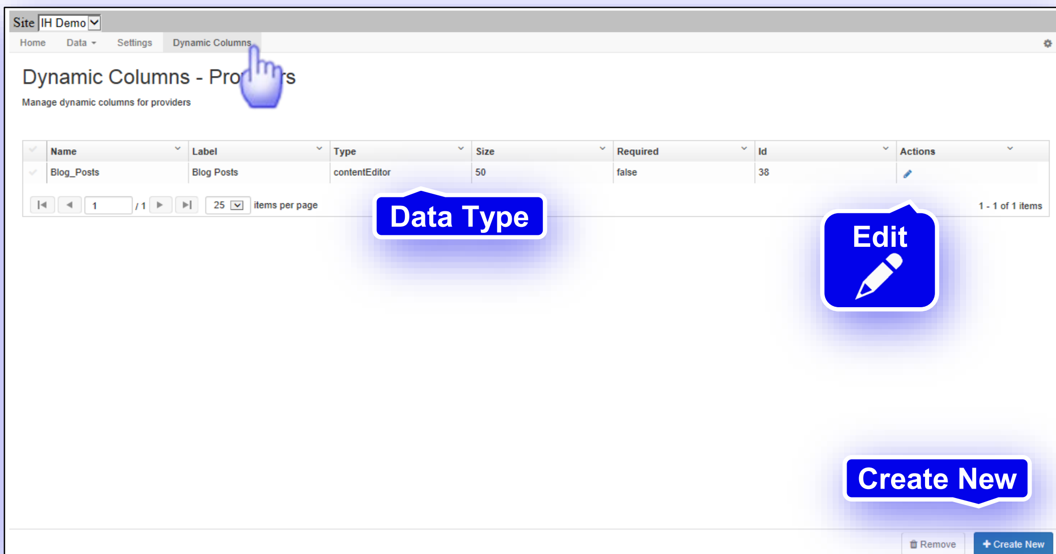


DYNAMIC COLUMNS - PROVIDERS

The **Dynamic Columns - Providers** screen allows you to create and manage *custom* fields for the **Providers** screen.

To Access Dynamic Columns

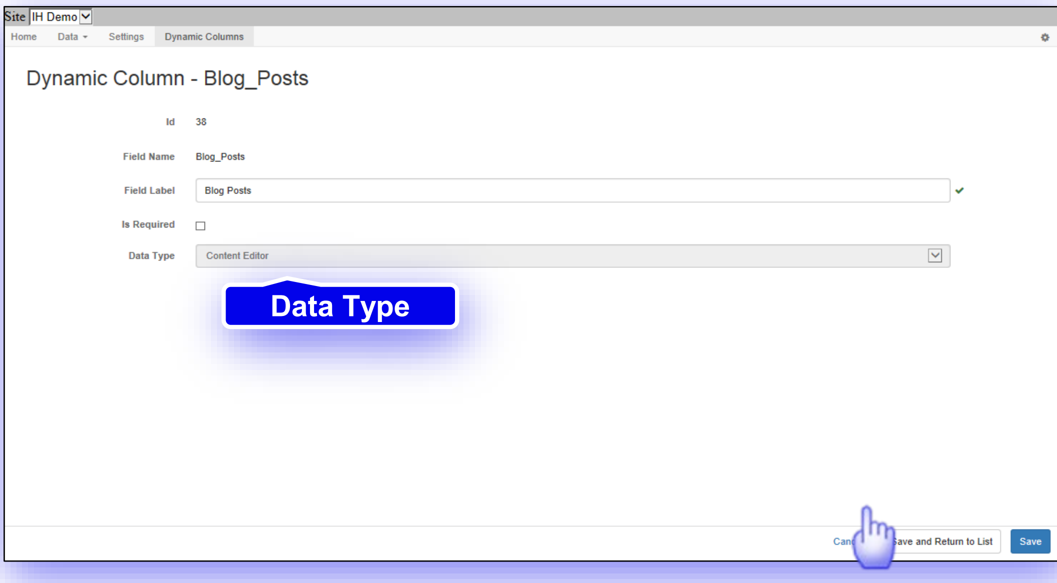
Click the **Dynamic Columns** link in the top menu of the **Content App**. The **Dynamic Columns - Providers** screen displays. Here, you can create**,** edit or remove dynamic columns (custom provider fields).



For our example, we will look at a new field that has been created, *Blog Posts*. Here are the field's properties and selected values. The **Type** property for this field displays *contentEditor*. Other available data types are: *Text, Number, Date and Dropdown*.

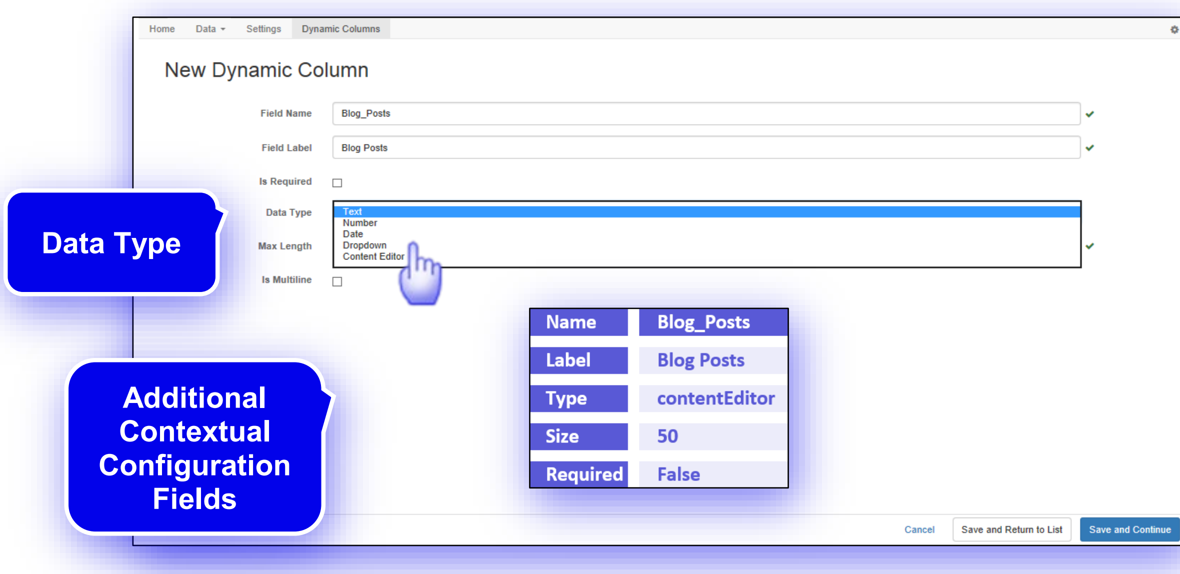
Name	Blog_Posts
Label	Blog Posts
Type	contentEditor
Size	50
Required	False
Actions	Edit

If you click the **Edit** pencil icon, as shown above, you can see these options and make non-permission-restricted changes.


Site IH Demo
Home
Data
Settings
Dynamic Columns
Dynamic Column - Blog_Posts
Id
38
Field Name
Blog_Posts
Field Label
Blog Posts
Is Required
Data Type
Content Editor
Data Type
Save

TO CREATE A NEW CUSTOM FIELD
Click the **Cancel** button, as shown above, to return to the **Dynamic Columns - Providers** screen, or click the **Dynamic Columns** tab at the top left. From the **Dynamic Columns - Providers** screen, click the **Create New** button in the screen's lower right. The **New Dynamic Column** screen displays.

- **Field Name** (This will be the name of your custom field in the data base. For our example, this is *Blog_Posts.*)
- **Field Label** (This is the display name of the custom field. For our example, this is *Blog Posts.*)
- **Is Required** (Check this box to make this a required field. For our example, we left this property unchecked; therefore, completing the resulting custom field will not be required for the user.)
- **Data Type** (These are the data type selections that define what type of field you are creating, whether *Text, Number, Date, Dropdown or Content Editor*. Additional options display below, depending on the data type selection.)

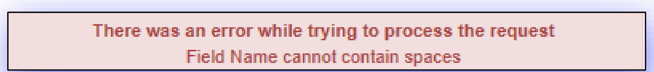


Additional Contextual Configuration Fields

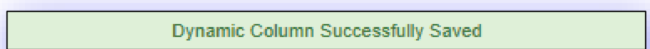
- **Max Length** (Enter the maximum number of characters allowed in this custom field. This does not apply to the *Content Editor* data type, so once the selection of *Content Editor* is made, there are no additional options displayed below. **Max Length** applies to the *Text* data type only.)
- **Is Multiline** (This data type property selection applies to the *Text* data type only. Check this box to allow more than one line of text in the resulting textfield, where applicable. Multiline text supports word wrapping, vertical and horizontal scrolling.)
- **Dropdown Options** (A selection of *Dropdown* as the **Data Type** renders this additional contextual configuration field. This field allows free text entry.)

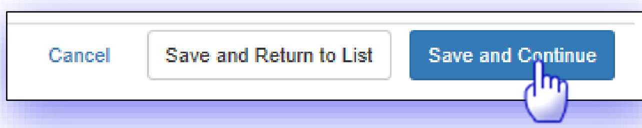
Once you have made your selections and entered any needed information for your custom field, click **Save and Continue.**

If you have used spaces in the first field, **Field Name**, you will see an error message restricting you from saving your custom field. Remember, this will be the name of your custom field in the data base, which in our example, is *Blog_Posts.* Replace any spaces with an underbar to meet this requirement.



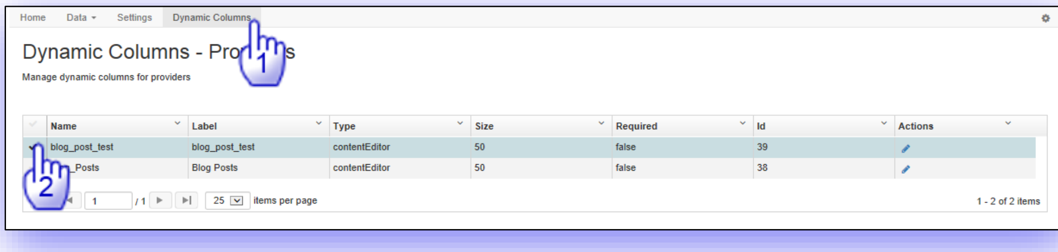
If all information has been entered according to the restrictions for each of these fields, a confirmation message displays.





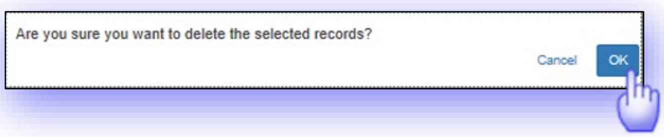
HOW TO REMOVE A FIELD

Below, we have added an additional test field, in order to demonstrate how to remove one. Return to the **Dynamic Columns – Providers** screen and click the checkbox at the beginning of the row, or record you wish to delete, as shown below.

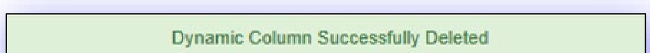


Then, at the bottom right of this page, click the **Remove** button.

A confirmation message displays. Click **OK**.



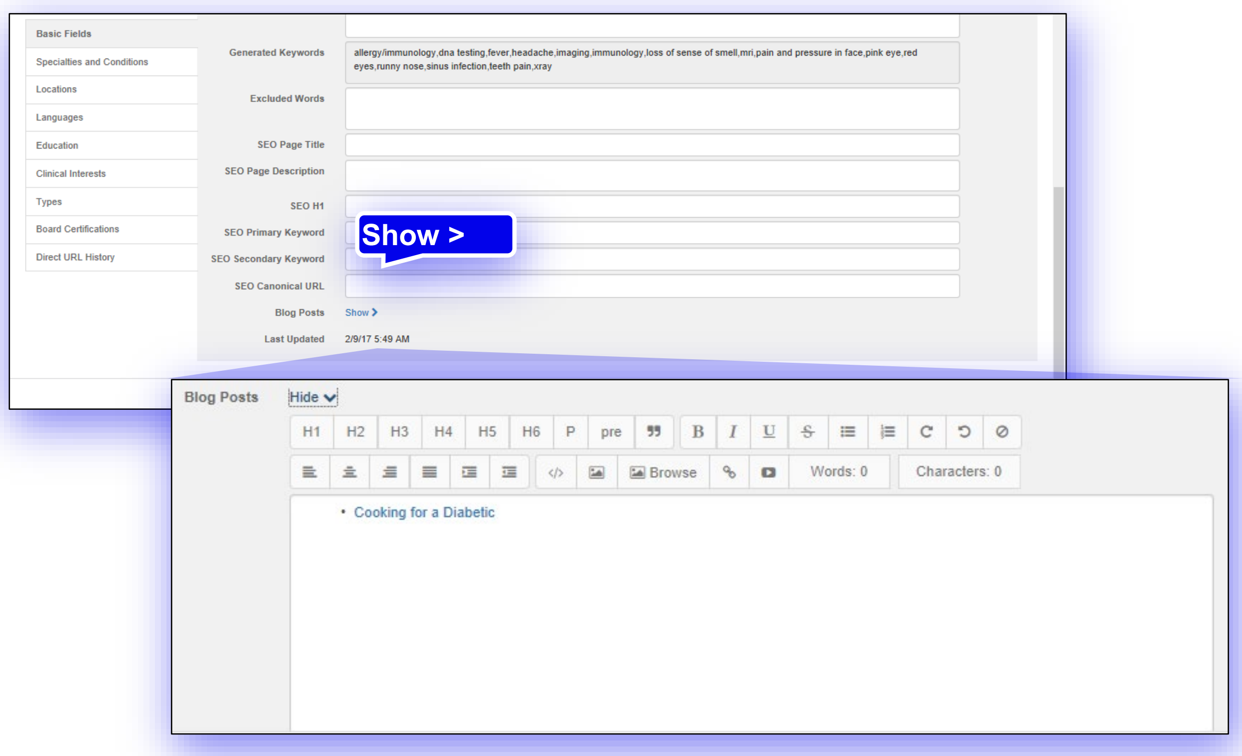
Your custom field has successfully been created.



THE BLOG POSTS FIELD

In the **Data** > **Providers List** > **Edit Provider Information** screen, is a custom **Blog Posts WYSIWYG** field we created, with the *Content Editor* data type.

The field is available in the **New Provider** screen, from which you can create new provider records, and upload or browse existing provider records.



PROVIDER RATINGS

CMS recently introduced **Provider Ratings**, a feature which allows visitors/patient prospects to research and compare hospital providers, based on patient feedback.

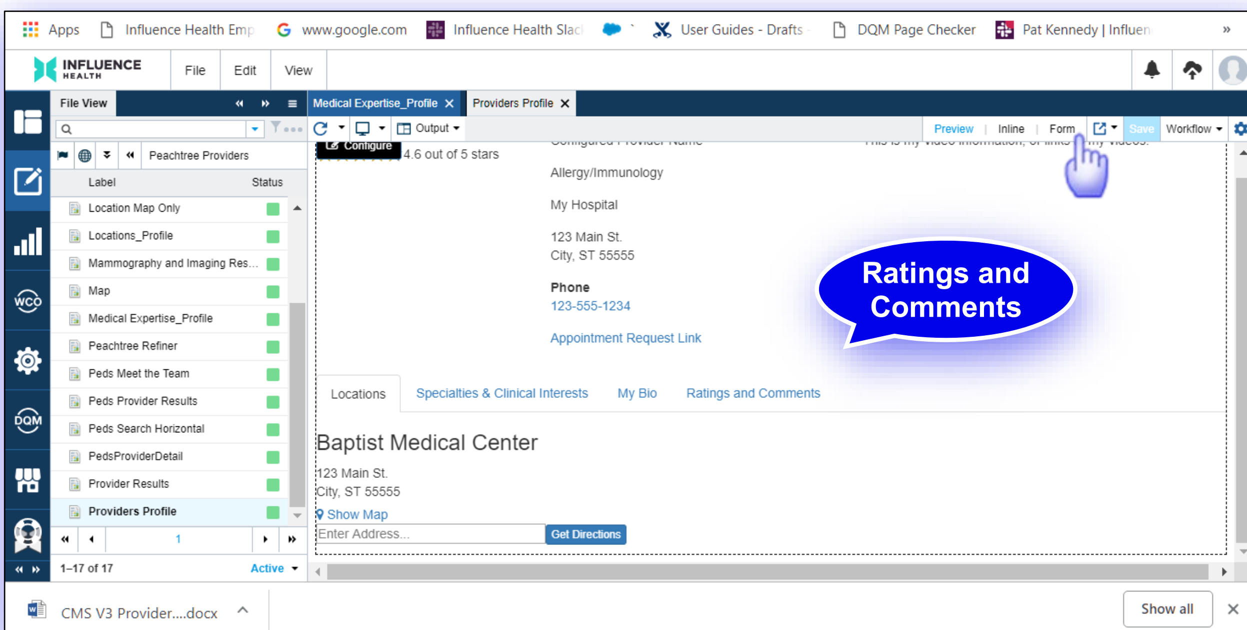
Provider Ratings and **Reviews** are now an available layout configuration option for **Provider Detail** and **List** page layouts, including the **Compare List** view and **Refinement** panel on the **Provider List** page.

Rating Comments, **Rating Details**, and **Ratings Image** fields have also been added to the **Provider Detail Available Fields**.

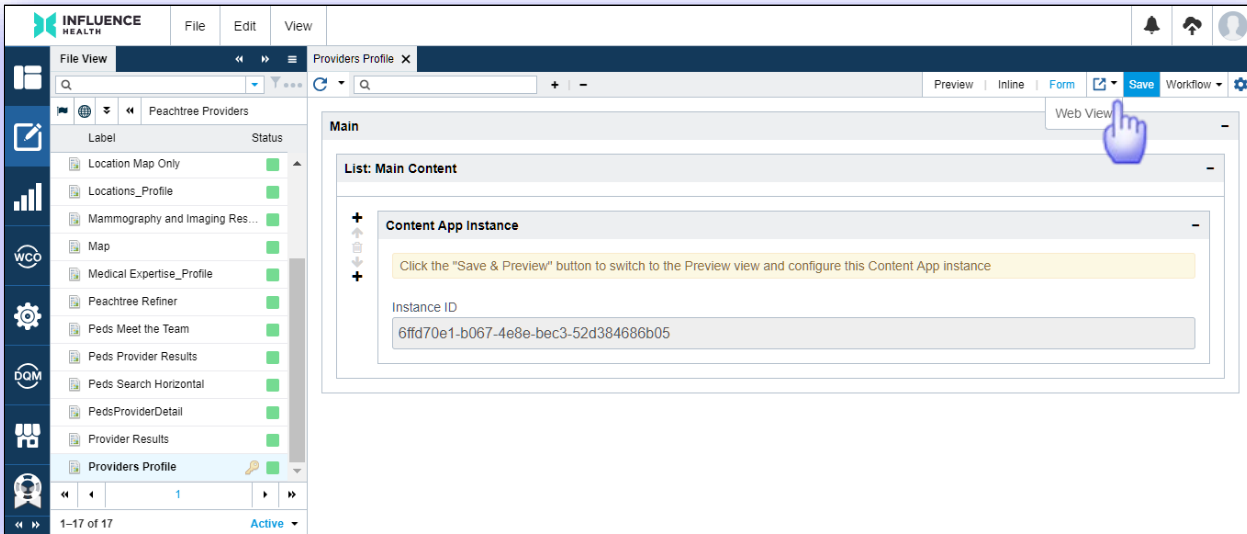
How to Configure Provider Ratings for Your Page

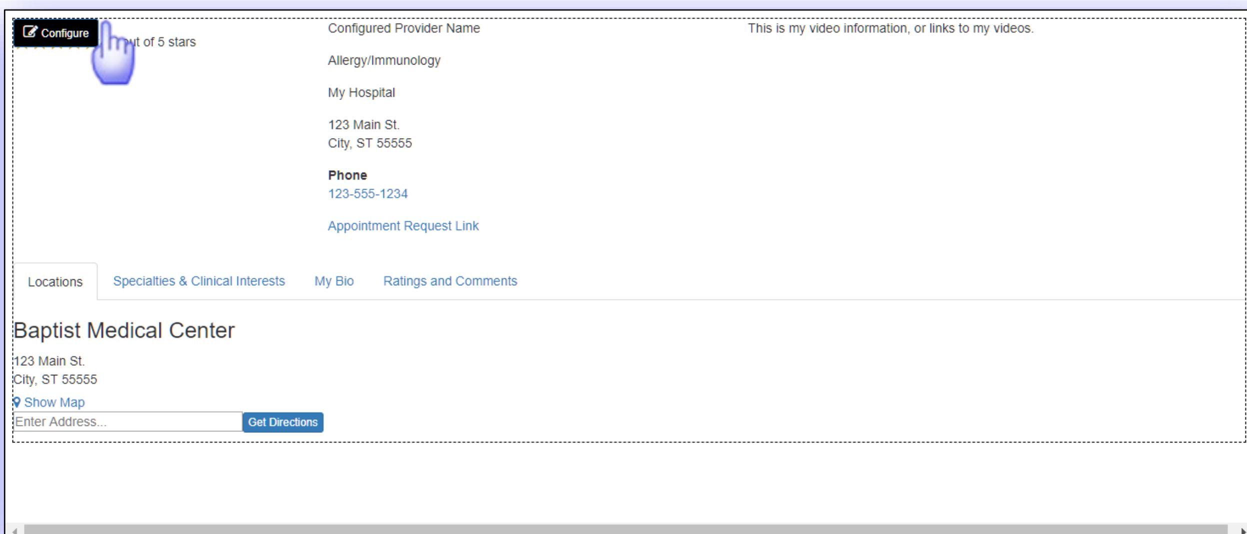
Navigate to your **Site Root/_Widgets** folder and your **Providers Profile** page and double click the directory name to load it. Our example uses the following path:
.. /Reference Sites/Sample/Site Root/_Widgets/Peachtree Widgets/Peachtree Providers/Providers Profile.

Our sample screen displays, with the new **Ratings and Comments** tab visible, mid screen. Click the **Form** view to edit.



From the form that loads, Click the **Web View** button to preview and configure this **Content App** instance. When the **Configure** button displays, click it to configure the page.



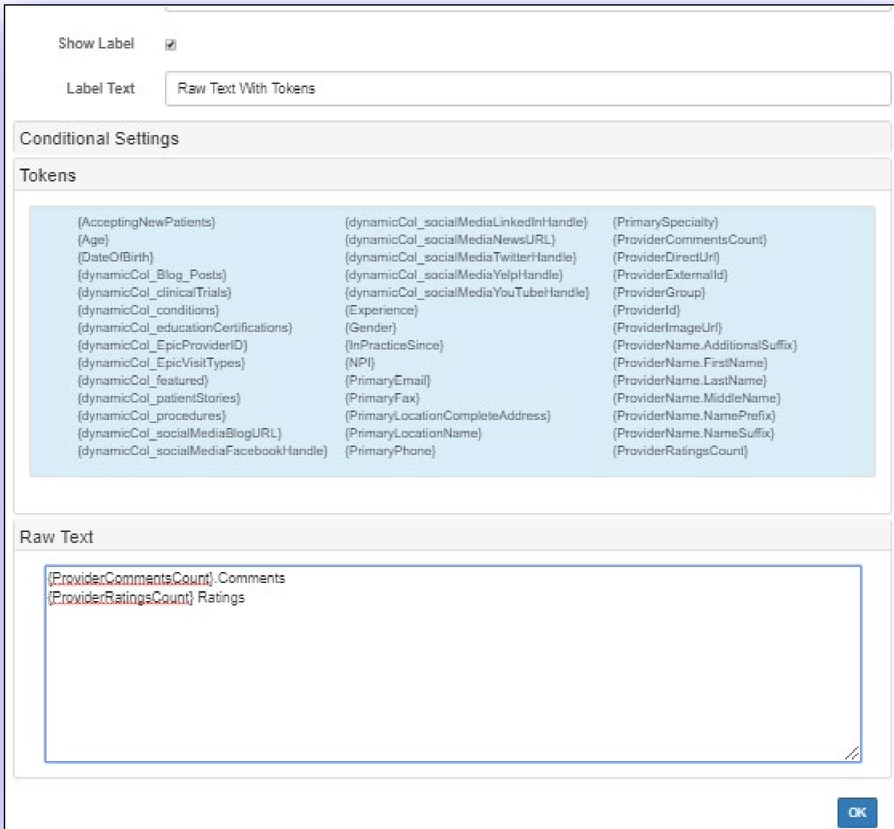


When the next screen displays, drag **Raw Text with Tokens**[4] from **Available Fields** to the desired **Column** on the right of the screen as shown below, then click the **Edit** (pencil) icon to access and apply the tokens, **{ProviderRatingsCount}** and **{ProviderCommentsCount}**.

Rating Comments, Rating Details, and Ratings Image fields have also been added to the Provider Detail Available Fields.

[4] The **Raw Text** editor is an advanced feature intended for use by engineers who are aware of the risks of injecting code into pages. The CMS system does not validate code placed into this control. Healthgrades is not responsible for validating or debugging client code, or for triaging or correcting problems caused by client code. By using this control, you agree that Healthgrades is held harmless for any negative effect to your website caused by code placement within this control.

Expand the **Tokens** tab. Copy and paste these two token names (with their brackets) into the **Raw Text** area below, providing the desired labels where desired, using plain text.



The full list of tokens that are available from this modal are:
{

- AcceptingNewPatients}
- {Age}
- {DateOfBirth}
- {dynamicCol_Blog_Posts}
- {dynamicCol_clinicalTrials}
- {dynamicCol_conditions}
- {dynamicCol_educationCe rtifications}
- {dynamicCol_EpicProviderI D}
- {dynamicCol_EpicVisitType s}
- {dynamicCol_featured}
- {dynamicCol_patientStories }
- {dynamicCol_procedures}
- {dynamicCol_socialMediaB logURL}
- {ProviderRatingsCount}
- {dynamicCol_socialMediaF acebookHandle}
- {dynamicCol_socialMediaLi nkedInHandle}
- {dynamicCol_socialMedia NewsURL}
- {dynamicCol_socialMediaT witterHandle}
- {dynamicCol_socialMediaY elpHandle}
- {dynamicCol_socialMediaY ouTubeHandle}
- {Experience}
- {Gender}
- {InPracticeSince}
- {NPI}
- {PrimaryEmail}
- {PrimaryFax}
- {PrimaryLocationComplete Address}
- {PrimaryLocationName}
- {PrimaryPhone}
- {PrimarySpecialty}
- {ProviderCommentsCount}
- {ProviderDirectUrl}
- {ProviderExternalId}
- {ProviderGroup}
- {ProviderId}
- {ProviderImageUrl}
- {ProviderName.AdditionalS uffix}
- {ProviderName.FirstName}
- {ProviderName.LastName}
- {ProviderName.MiddleNam e}
- {ProviderName.NamePrefix}
- {ProviderName.NameSuffix}

Another published page sample Is provided below.

Provider Ratings

Provider Ratings - 164 ratings

Responses are measured on a scale of 1 to 5, with 5 being the best score. For more information about the survey, please visit the ***About Our Survey*** *page.*

Care provider's friendliness and courtesy
4.8
Care provider's explanation of condition/problem
4.7
Care provider's concern for questions and worries
4.8
Care provider's efforts to include me in decisions
4.7
Care provider's information about medications
4.7

More

Provider Comments - 24 comments

Provider comments are gathered from our Press Ganey patient surveys and displayed in their entirety. Patients are de-identified for confidentiality and patient privacy. For more information about the survey, please visit the ***About Our Survey*** *page.*

Overall my visit to this appointment was all i expected and glad for it.
-October 22, 2017

all good
July 24, 2017

THE LOCATIONS CONTENT APP

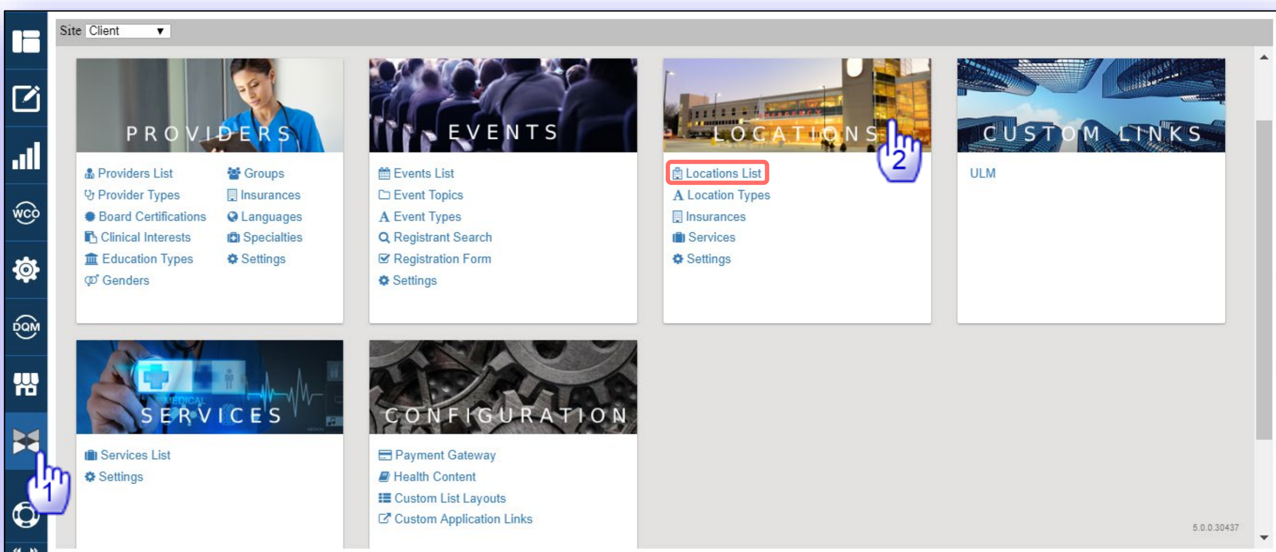
The **Locations** content app allows consumers to search for locations that associated with the health care organization. Here, services and associated content can be customized based on the health care organization’s preferences.

HOW TO ACCESS THE LOCATIONS CONTENT APP

To access **Content App** components from anywhere within CMS, click the **Content Apps** option from within the **Apps** left menu, as shown in the screen image below.

The **Content Apps** console displays. From the **Content Apps** console, you can manage **Providers**, **Events**, **Locations**, **Services** and other configuration items. Each content app has its own menu of management items.

Click the **Locations** widget, as shown below, or the specific **Locations List** link from the **Locations** menu

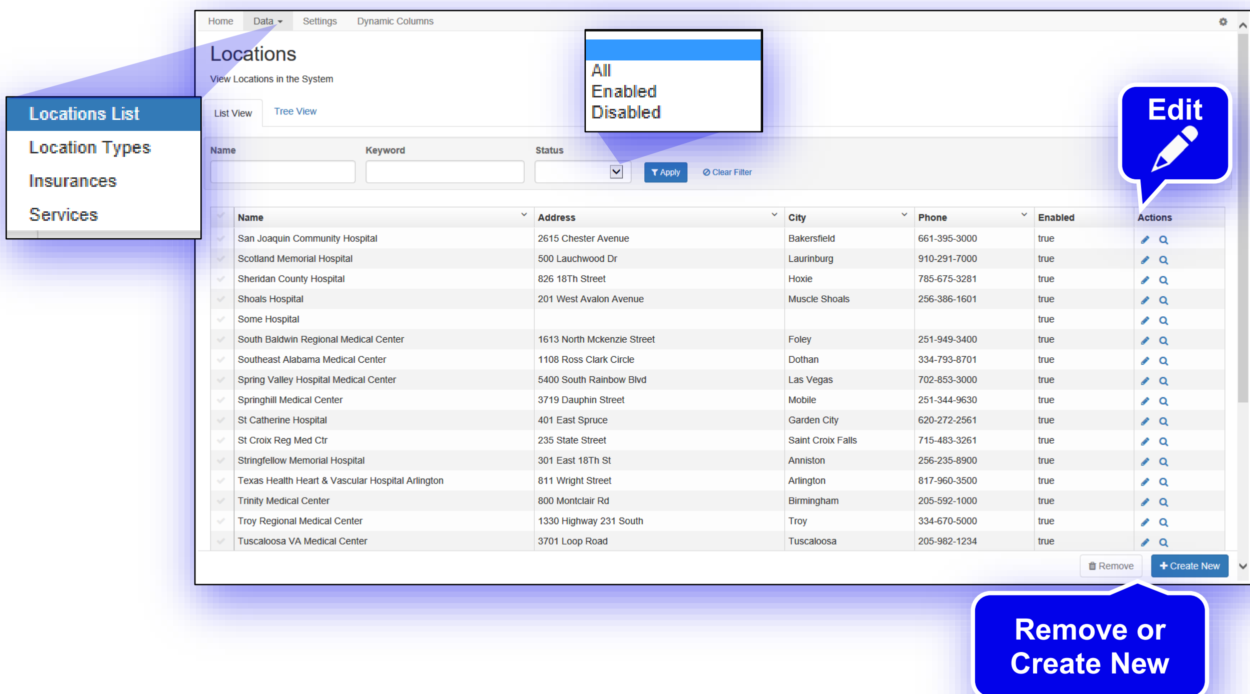


The Locations List Page

Access the **Locations** list page displays. The **Locations** page provides functionality for you to search and filter, with options to **Apply** (run) or to **Clear Filter** and to edit or remove existing location records, as well as create new records.

From the **Location** page, you can perform the following actions:

- Search for a location record by **Name**, **Keyword** and **Status** *(All, Enabled, Disabled).*
- **Create New** location records.
- **Edit** location records.
- **Remove** location records.



HOW TO CREATE A NEW LOCATION

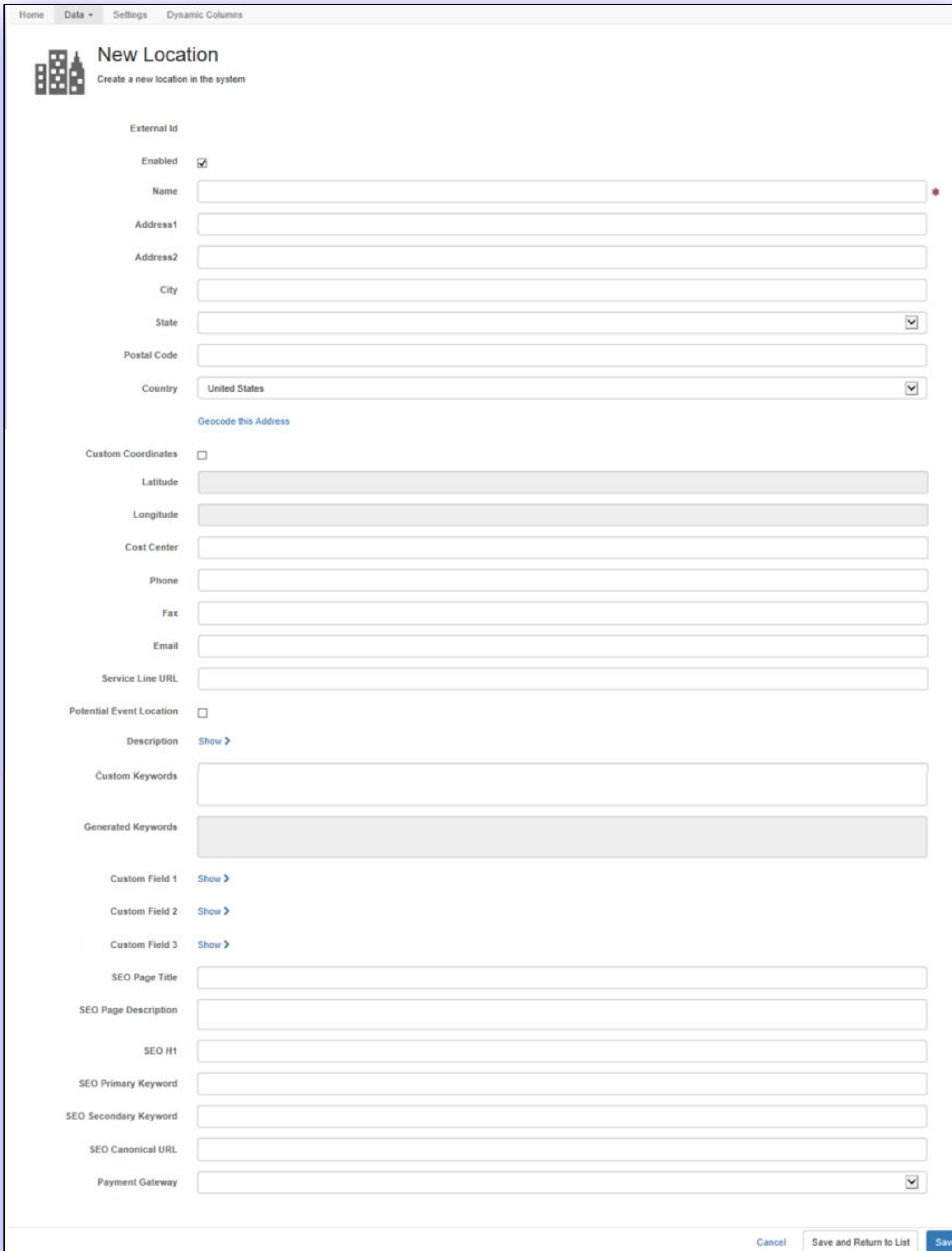
Click the **Create New** button, as shown above, from the lower right of the screen. The **New Location** screen displays, as shown below. Following, are the fields in the screen that you will use to create a new **Location** record.

- **External ID** (This is the system-generated record identification number that is used by the system for data association purposes.)
- **Enabled** (This checkbox, if enabled, displays the location record.)
- **Name** (Enter the name of the location.)
- **Address 1** (Enter address line 1 of location, for example: *3000 Riverchase Galleria Parkway.*)
- **Address 2** (Enter address line 2 of location, for example: *Suite 203.*)
- **City** (Enter the city of the location.)
- **State** (Enter the state of the location.)
- **Postal Code** (Enter the ZIP code of the location.)
- **Country** (Enter the country of the location.)
- **Custom Coordinates** (Click this checkbox to enable the custom coordinates that you will enter below.)
- **Latitude** (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** (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** (This is a free-entry text field.)
- **Phone** (Enter this information in contiguous numbers. The field auto-formats as a dash-delineated phone number, for example: 800-555-5555.)
- **Fax** (Enter this information in contiguous numbers. The field auto-formats as a dash-delineated phone number, for example: 800-555-5555.)
- **Email** (This is a free-entry text field.)
- **Service Line URL** (Enter the appropriate URL in this field.)
- **Potential Event Location** (Check this box if the location may be used as a potential event location. If left unchecked, then the location will not display as a location option when creating an event.)
- **Description** (Click the **Show** button to enable this field. When enabled, this field expands to reveal a WYSIWYG editor, so that you can create a rich-text formatted description of the location.)
- **Custom Keywords** (These are keywords that will be associated with the location.)
- **Generated Keywords** (These are system-generated keywords that are related to the location (non-editable).)
- **Custom Field 1-3** (Click the **Show** button to reveal a WYSIWYG editor, so that you can create custom fields with rich-text formatting.)

The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

- **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.
- The title element of a web page should be a concise description of a page's content. Users see the title in two places: as the page's name in the browser tab and in search results.)
- **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 Metatags** (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 Tag** (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.)
- **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 **SEO Canonical URL** tag attribute bears similarity to a 301 redirect, but it communicates to search engines that multiple pages should be considered as one, without 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 New Location Screen



WORKING WITH LOCATION TYPES

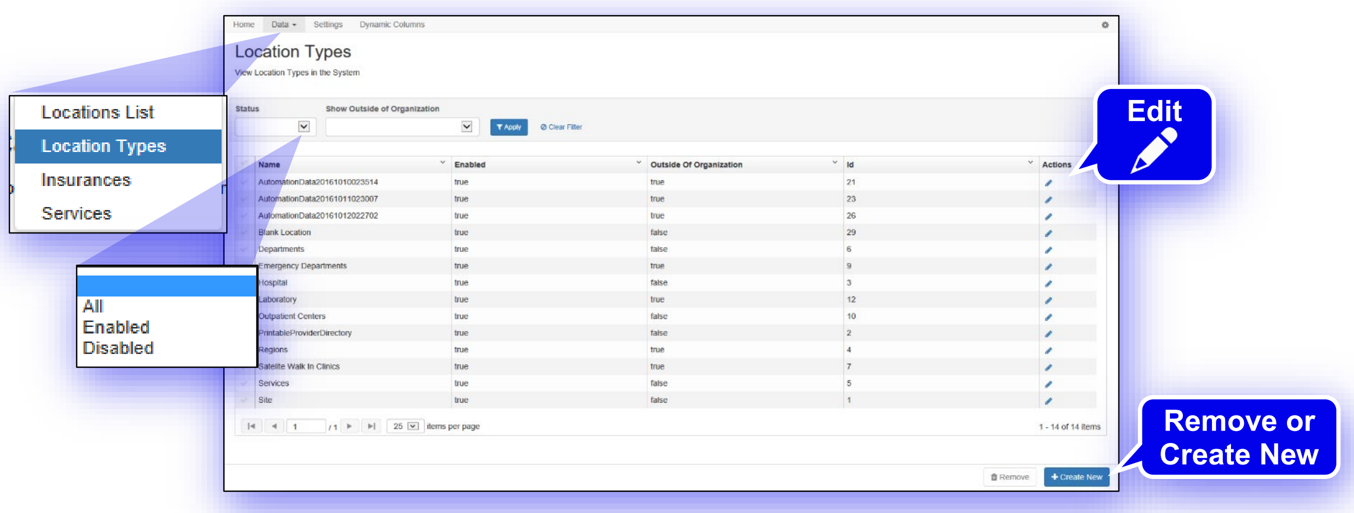
The **Location Types** screen allows you to add, edit and remove location types. This page also contains a filter to assist with locating location types by **Status** *(All, Enabled, Disabled)*, with options to **Apply** (run) or to **Clear Filter** and by locations outside of the organization (**Show Outside of Organization**: *Yes, No*).

To Access Location Types

To access this page, choose the **Location Types** link from the **Locations** content app menu, we described earlier, or from the top **Data** tab dropdown option).

The **Location Types** management page displays, with functionality as described earlier: **Search**, **Edit**, **Remove** and **Create New**. Click the checkbox at the beginning of a row, or record, to act on it. Fields may be sorted using the options in their drop downs, as shown below. The fields are:

- **Name** (This column displays the location type name, such as: Department, Emergency Room, Hospital, Printable Provider Directory, etc.)
- **Enabled** (Displayed values are True or False.)
- **Outside of Organization** (Displayed values are True or False.)
- **ID** (This is the system-generated number that is associated with the location type record.)
- **Actions** (Click the pencil icon beside a record to view and edit its properties.)



Note:

Location Types can also be added directly from a location record.

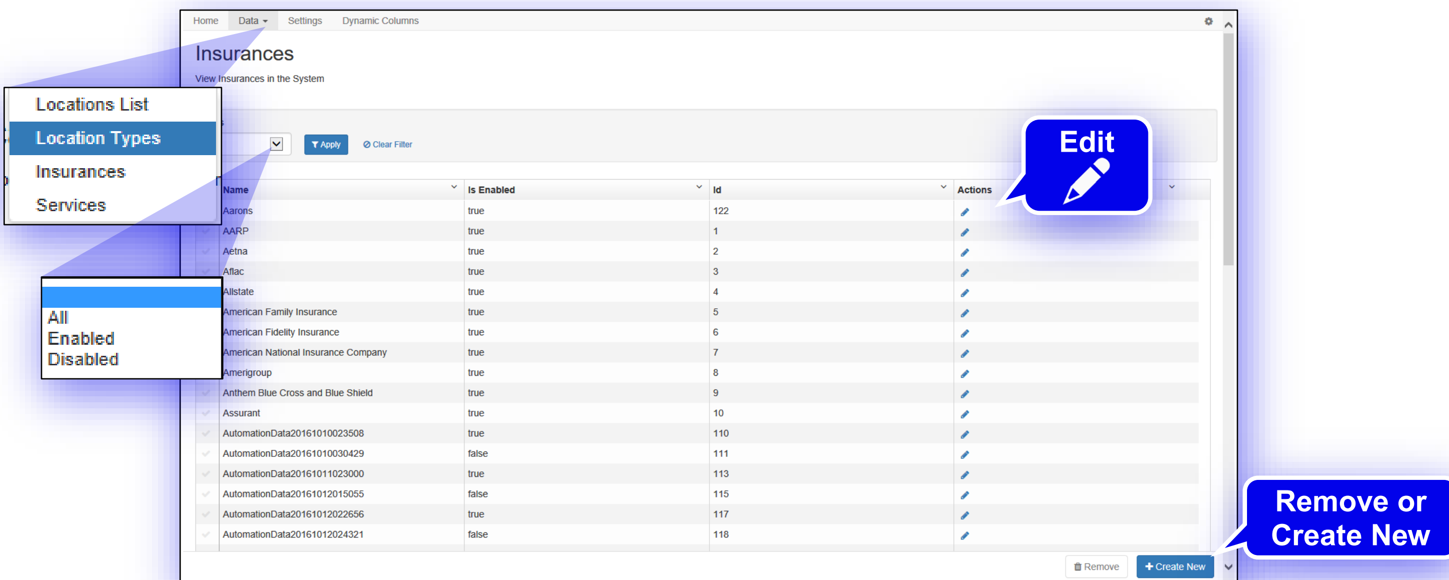
WORKING WITH INSURANCES

The **Insurances** screen allows you to add, edit and remove the insurances that are associated with your locations. This page contains a filter to assist with locating insurances by **Status** *(All, Enabled, Disabled)*, with options to **Apply** (run) or to **Clear Filter**.

To Access Insurances

To access this page, choose the **Insurances** link from the **Locations** content app menu, as we described earlier, or from the **Data** tab dropdown option. The **Insurances** management page displays. The fields are:

- **Name** (This is the name of the insurance.)
- **Is Enabled** (Displayed values are *True* or *False*.)
- **ID** (This number is associated with the location type record. It is system-generated.)
- **Actions** (Click the pencil icon beside a record to view and edit its properties.)



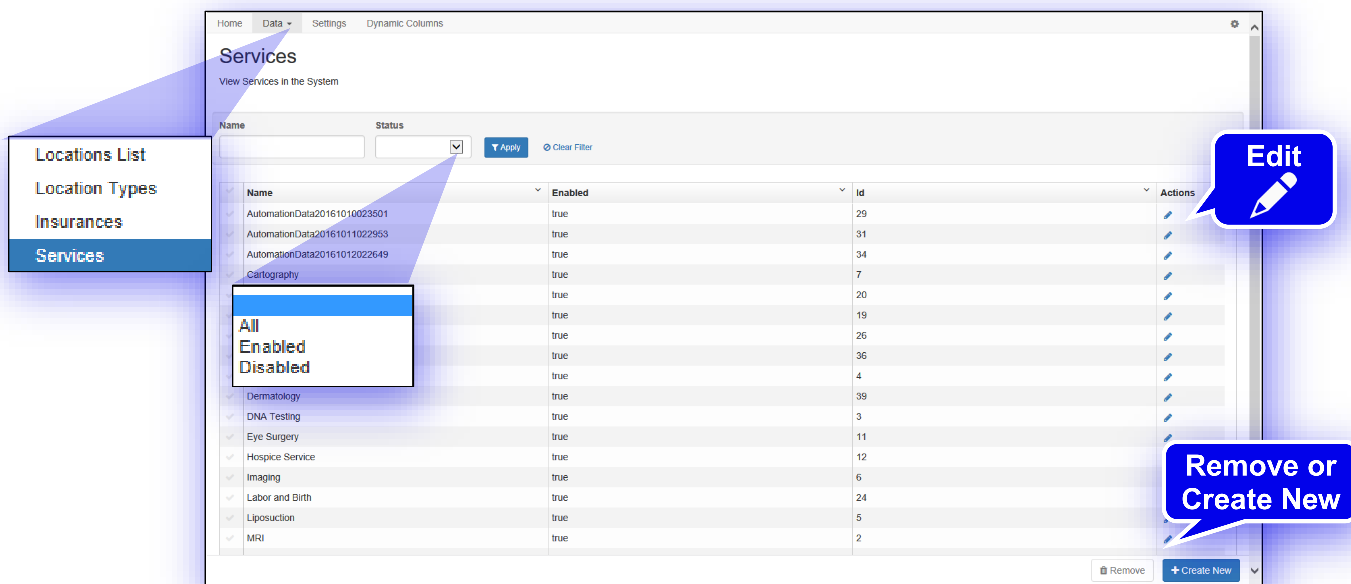
Note:

Insurances can also be added directly from a location record.

Services

The **Services** option allows you to add, edit and remove the services that are associated with your locations. This page contains a filter to assist with locating services by **Name** and by **Status** *(All, Enabled, Disabled).*

To access this page, choose the **Services** link from the **Locations** content app menu (or from the **Data** tab dropdown). The **Services** management page displays.



Note;

Services can also be added directly from a location record.

SETTINGS

The **Services Settings** page, available from the **Settings** tab, provides configuration options which are related to the **Locations** content app: **Search Settings**, **Detail Settings** and **SEO Settings**.

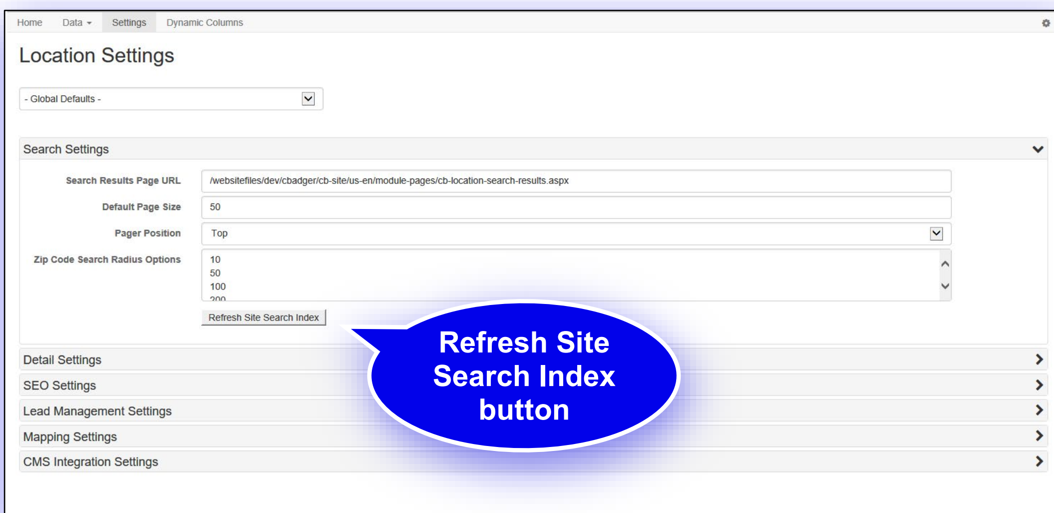
To Access Location Settings

Choose the **Settings** link from the **Locations** content app menu, as we described previously, or from the **Settings** tab. The **Settings** management page displays.

From here you can configure the following.

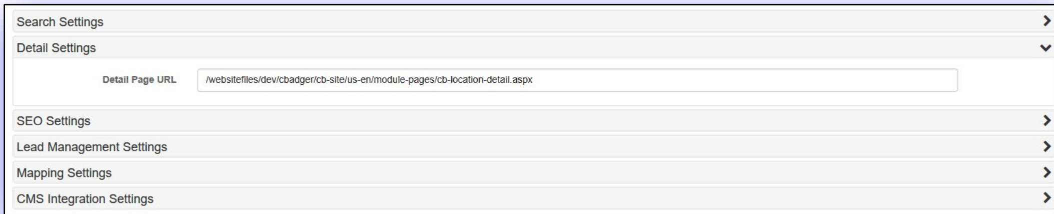
Search Settings:

- **Search Results Page URL** (Enter the URL of the **Locations** search results (list) page.)
- **Default Page Size** (Enter the number of results that will display on the **Search Results** page.)
- **Pager Position** (Configure the placement of the pagination feature on the **Search Results** page. Available options are: *Top and Bottom, Top, Bottom.*)
- **ZIP Code Search Results Radius Options** (Set the default **ZIP Code** search radius (in miles).)
- **Refresh Site Search Index** (Click this button to refresh the site search after adding, editing or deleting records.)



Detail Settings

- **Detail Page URL** (This is the full URL to the **Locations** public profile page.)



SEO Settings

- **Detail Page Formula** (These tokens[5] in this formula comprise the smart title that is displayed on the **Locations** detail page.)
- **Search Results Page Keyword Formula** (This formula comprises the **Keyword** search on the **Locations** page: *Find {KeywordSearched}*, etc.)
- **Search Results Page ZIP Code Formula** (These tokens comprise the **Locations ZIP** search. As an example, in the field displayed, below we see: *Find Locations Near {ZipCodeSearched} - Page {PageNum} - {FacilityName}, {FacilityCity}, {FacilityState} ({FacilityStateAbbrev}*

  This means: Find Search Type near ZIP Code – Page Number – Facility Name, Facility City, State (ST), for example: Find *Emergency Department* near *43257* – Page *2* – *Healthgrades*, *Birmingham*, Alabama (*AL*).)
- **Search Results Page Base Formula**

- **Lead Management Settings**

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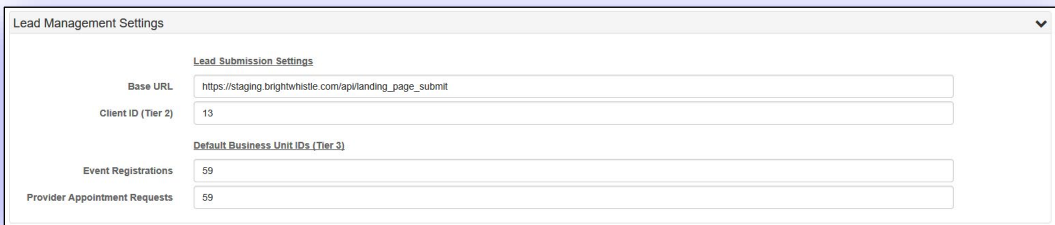
[5] A token, simply stated, is a symbolic representation of a larger piece of data.

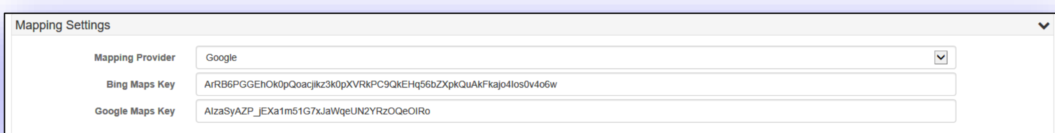
- **Lead Submission Settings**
- **Base URL** (This is the **Lead Submission Settings** base URL, or base location. Once specified, converts all relative URLs on that page to absolute URLs.)
- **Client ID (Tier 2)** (This is a free-entry text field.)
- **Default Business Unit IDs (Tier 3)**
- **Event Registrations** (This is a free-entry text field.)



- **Provider Appointment Requests** (This is a free-entry text field.)

Mapping Settings

- **Mapping Provider** (Select your **Locations** map provider, for example: *Google* or *Bing*, from the provided drop down list.)
- **Bing Maps Key** (This is the key authentication code that you get when you register for Bing maps.)
- **Google Maps Key** (This is the key authentication code that you get when you register for Google maps.)



CMS Integration Settings

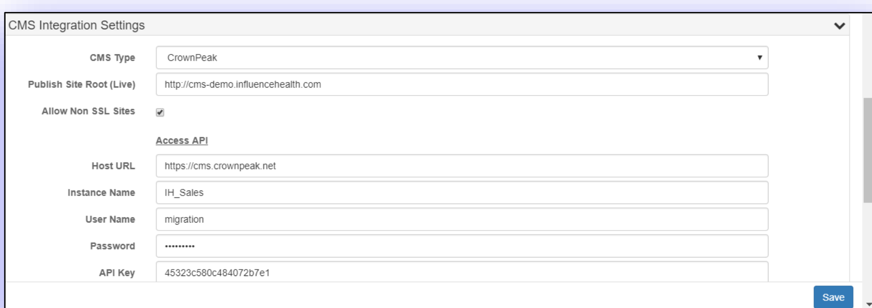
- **CMS Type** (Make the **CMS Type** selection from this drop-down field.)
- **Publish Site Root (Live)** (Enter the **Live Site Root** URL.)
- **Allow Non-SSL[6] Sites**
- **Host URL (**Enter the **Host** URL.)
- **Instance Name (**Enter the instance name for your site.)
- **User Name (**Enter a username.)
- **Password (**Enter a password.)
- **API Key** (Enter the application programming interface (API) key.)

Image Library Settings

- **CMS Path** (Enter the path to your CMS, for example: /Your Site/Site Root/Assets/Images.)
- **Publish Server Path** (Enter the path for your publish server, for example: /Assets/Images.)
- **Workflow ID (**This is a free-entry text field.)

Site Search Settings

- **Search G2 Instance Name** (Search G2 is based on industry standard crawling, indexing and querying components, maintained by Apache. Enter the instance name for your site.)
- **User Name** (Enter a username.)
- **Password** (Enter a password.)
- **API Key** (Enter the application programming interface (API) key.)



DYNAMIC COLUMNS - LOCATIONS

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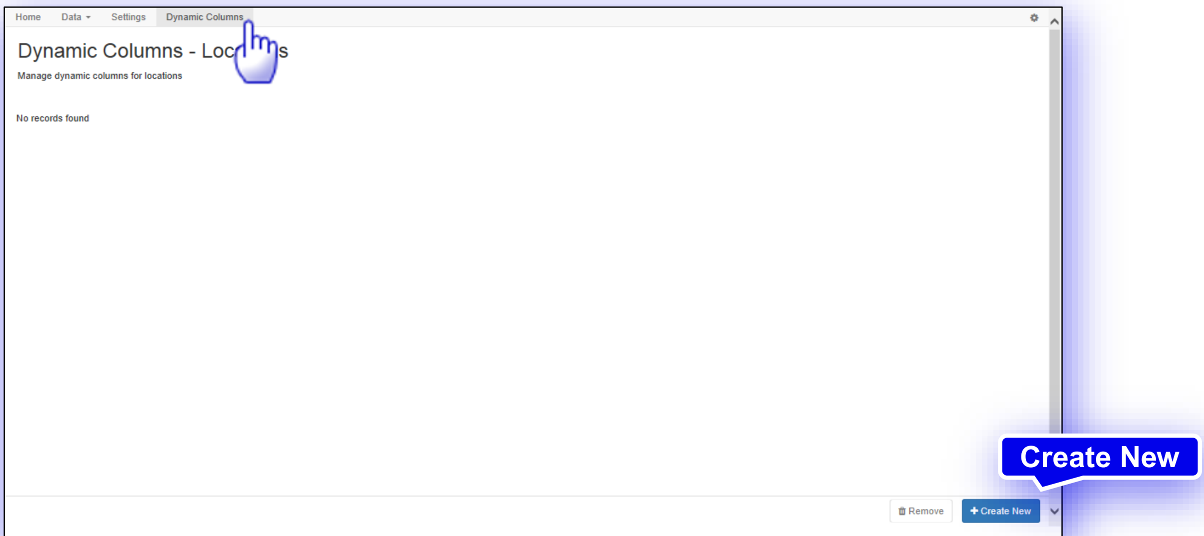
6 Secure Sockets Layer (SSL) standard security technology encrypts Hypertext Transfer Protocol (HTTP) for secure communication over a computer network, resulting in a secure Hyper Text Transfer Protocol Secure (HTTPS) version, which is used to protect highly confidential online transactions like online banking and online shopping order forms. To be able to create an SSL connection a web server requires an SSL Certificate.

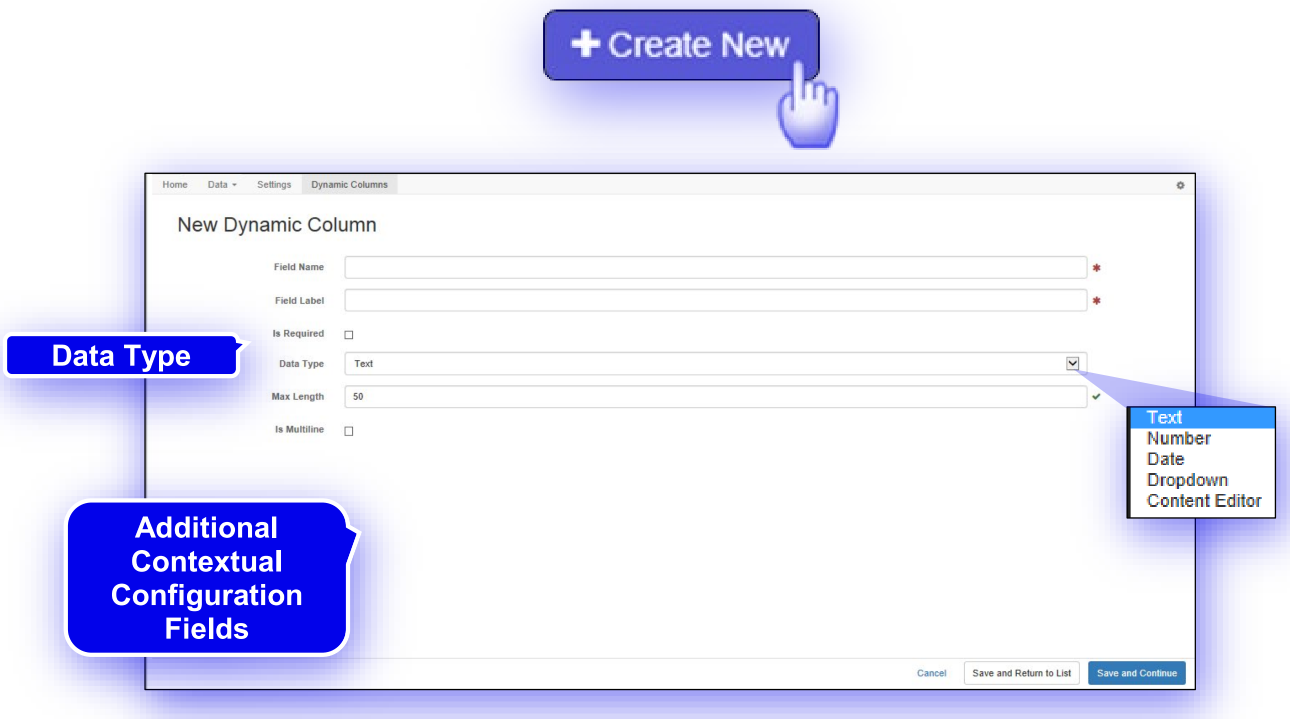
The **Dynamic Columns - Locations** screen allows you to create and manage *custom* fields for the **Locations** screen.

To Access Dynamic Columns

Click the **Dynamic Columns** tab. The **Dynamic Columns - Locations** screen displays. Here, you can create**,** edit or remove dynamic columns (custom location fields).



TO CREATE A NEW DYNAMIC COLUMN
From the **Dynamic Columns - Locations** screen, click the **Create New** button in the lower right of the screen. The **New Dynamic Column** screen displays. The dynamic column we create here will create a field of the type we select.



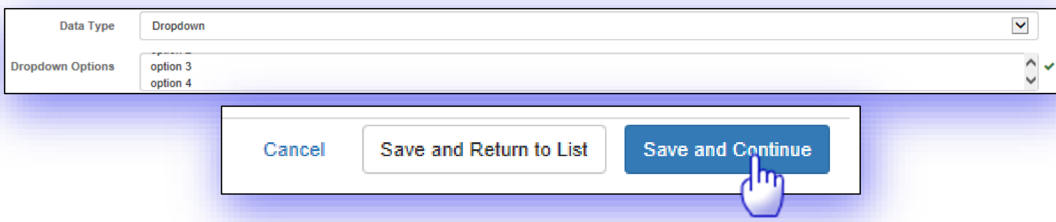
Create Your Custom Field Using These Options:

- **Field Name** (This will be the name of your custom field in the data base.)
- **Field Label** (This is the display name of the custom field.)
- **Is Required** (Check this box to make this a required field. If this property is left unchecked, completing the resulting custom field will not be required for the user.)
- **Data Type** (These are the data type selections that define what type of field you are creating, whether *Text, Number, Date, Dropdown* or *Content Editor*. Additional options display below this field, depending on the data type selection.)

Additional Contextual Configuration Fields

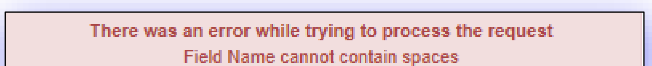
- **Max Length** (Enter the maximum number of characters allowed in this custom field. This does not apply to the *Content Editor* data type. **Max Length** applies to the *Text* data type only.) Once a data type of *Content Editor* is made for example, there are no additional options displayed.

- **Is Multiline** (This data type property selection applies to the *Text* data type only. Check this box to allow more than one line of text in the resulting text field, where applicable. Multiline text supports word wrapping, vertical and horizontal scrolling.)
- **Dropdown Options** (A selection of *Dropdown* as the **Data Type** renders this additional contextual configuration field. This field allows free text entry.)



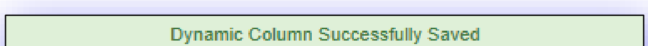
Once you have made your selections and entered any needed information for your custom field, click **Save and Continue**.

If you have used spaces in the first field, **Field Name**, you will see an error message restricting you from saving your custom field. Remember, this will be the name of your custom field in the data base.



Replace any spaces with an underbar to meet this requirement.

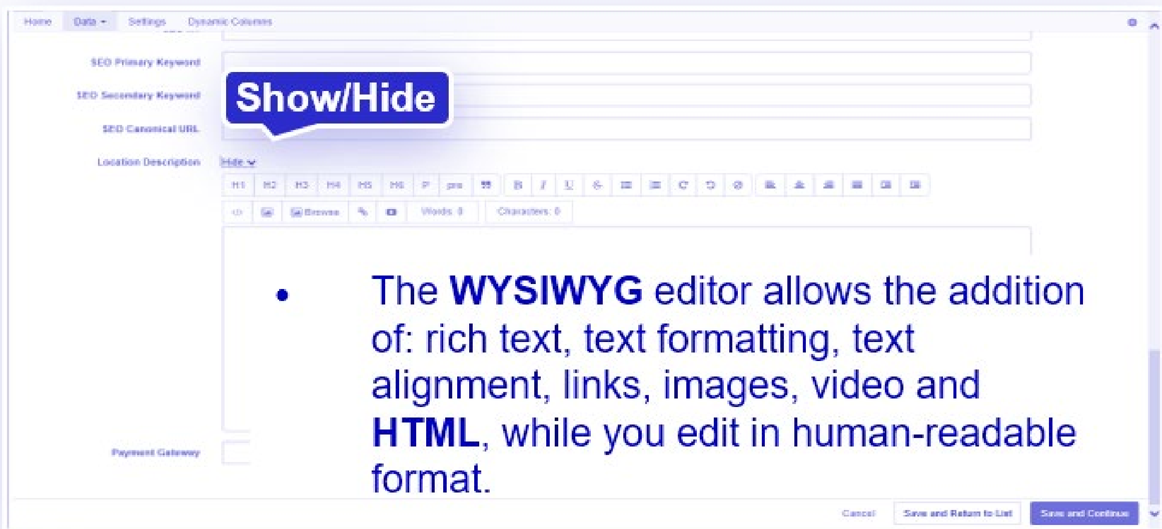
If all information has been entered according to the restrictions for each of these fields, a confirmation message displays.



THE LOCATION DESCRIPTION FIELD

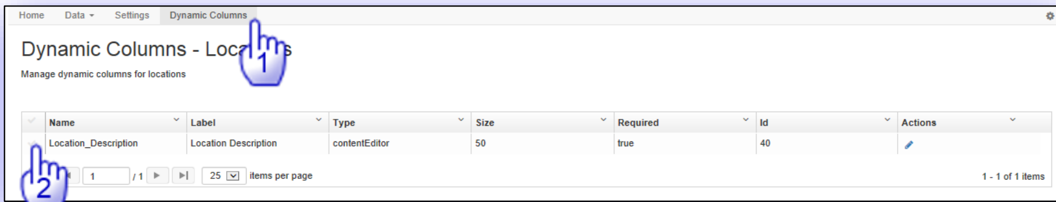
Here again, in the **Data** > **Locations List** > **Edit Location Information** screen, is a custom **Location Description** WYSIWYG field we created, with a *Content Editor* data type, in use.

The field is also available in the **New Location** screen.

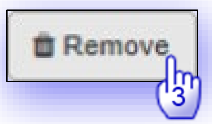


HOW TO REMOVE A FIELD

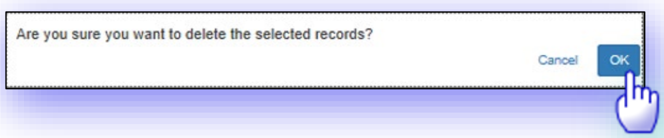
Above, we added an additional test field, in order to demonstrate how to remove one. Return to the **Dynamic Columns – Locations** screen and click the checkbox at the beginning of the row, or record you wish to delete, as shown below.



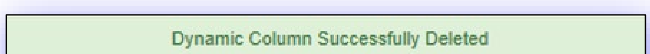
Then, at the bottom right of this page, click the **Remove** button.



A confirmation message displays. Click **OK**.



Your custom field has successfully been created.



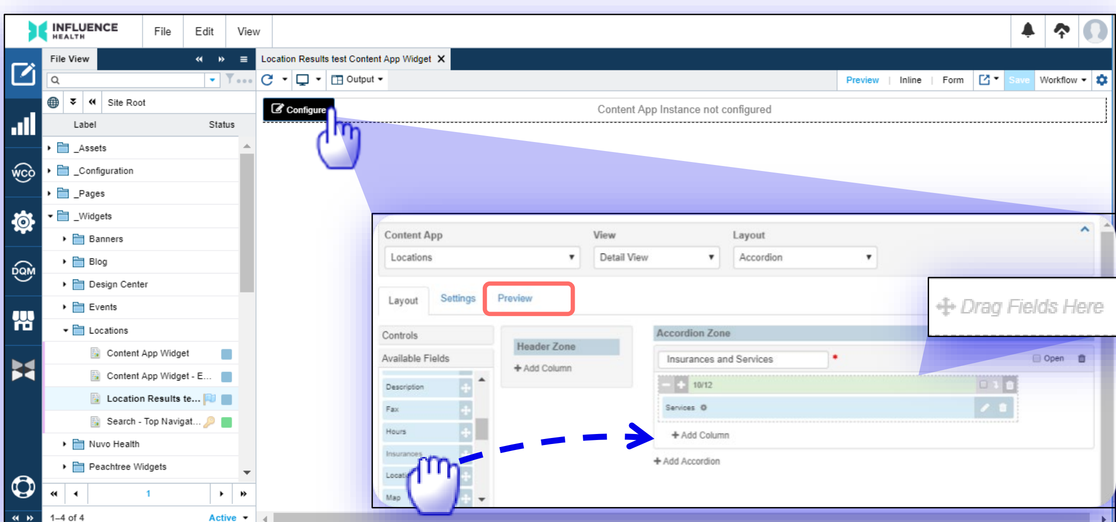
How to Add Insurances and Services to the Locations Search, List and Detail Widgets

Previously, the **Locations Widget** was searchable by **Keyword**, **Location Type** and **ZIP Code (with Radius)**. **Services** and **Insurances** have been added as drag-and-drop fields in the **Locations Search**, **List** and **Detail Widget** layouts.

To access the widget, go to your relative path using our sample path as a reference. For this demonstration, we used: *../Reference Sites/Sample/Site Root/_Widgets/*. Expand **Widgets**, then select **Locations** and a sample widget: **Location Results Test Content App Widget**.

Double-click your **Content App Widget**. Your widget opens in **Preview** mode. The preview page has a message button: **Content App Instance not configured**. Click this button to enable the **Configure** button, then click **Configure** to open the page. The first thing you will see is a drop-down list to **Select a Content App**. We selected **Locations**. With each selection, additional fields enable, to guide you through the process. We selected **Detail View** from **View** and **Accordion** from **Layout**.

As depicted in the image below, drag the new **Insurances** and/or **Services** fields from **Available Fields** to either the **Header** or **Accordion Zone** field area. Notice the hover-text information icon (ⓘ) on these fields. **Services** says: this is a complex field, which requires additional configuration prior to display. Click the **Preview Tab** in the current screen to view your results.



Remember, you can use Edit > Copy path to share,as well as Flag areas for quick access. You can also create a new widget here, from File > New > Model > Widget > Content App Widget.

UPDATED LOCATIONS LIST AND DETAIL WIDGET OPTIONS

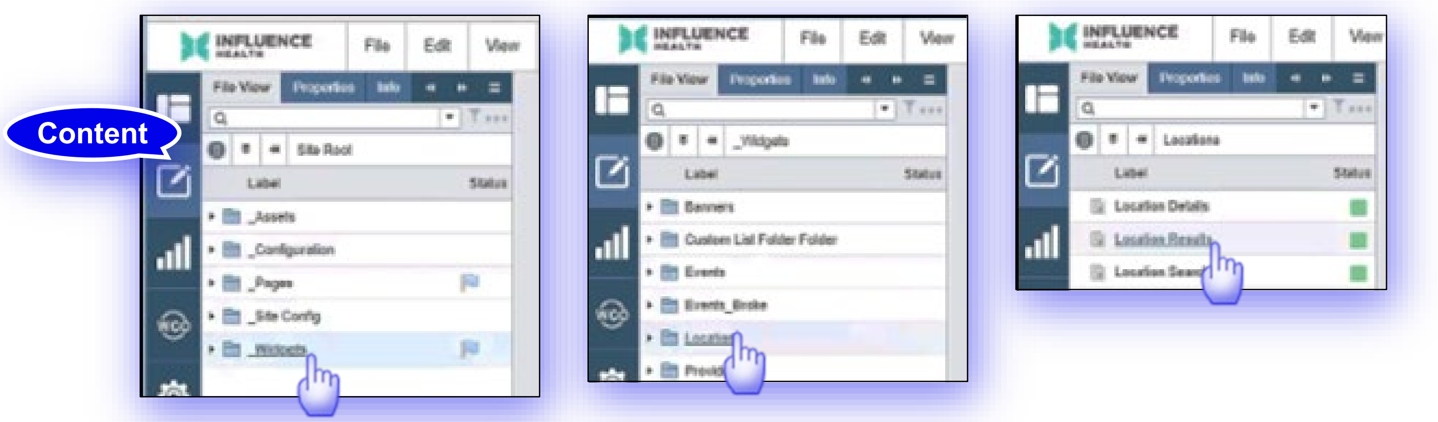
Insurances, Services and *Location Type* are now available as selections in the **When Field** drop-down field, under the **Conditional Settings** section of the **Raw Text with Tokens Configuration** field edit screen, as well as within that of the standard **Conditional** field edit screen, in both the **Locations List** and **Detail Widgets**.

Insurances, Services and *Location Type* are also available as **Default Query** options in the **Locations List** and **Detail Widgets**.

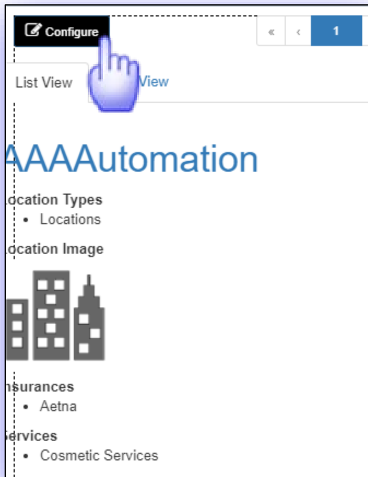
Access to these screens are similar.

How to Access the Location Results Widget

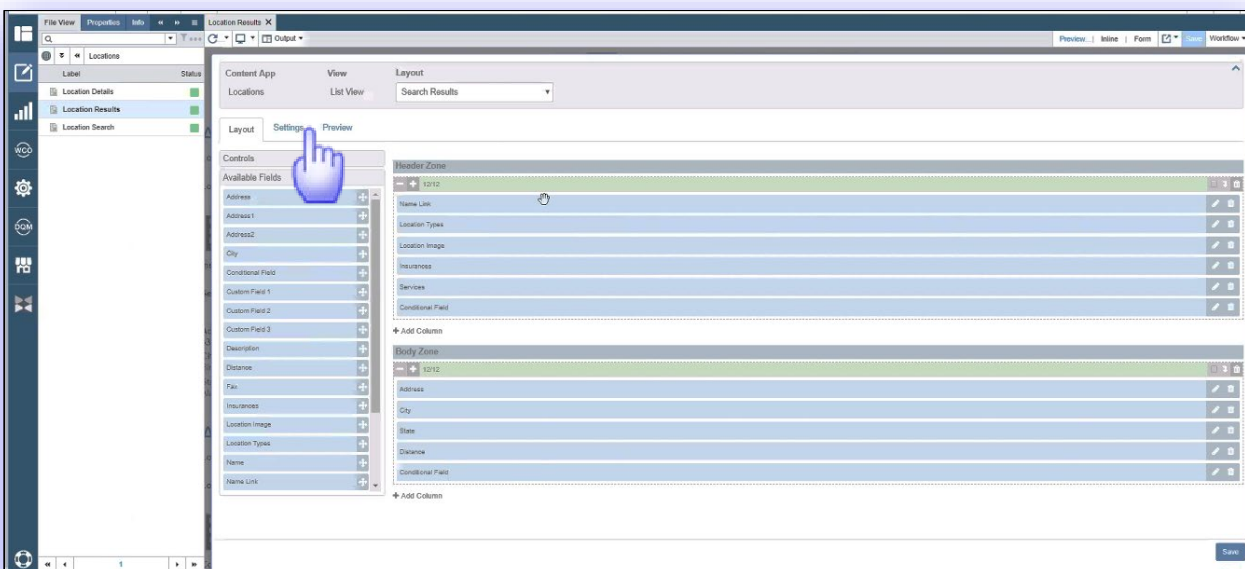
To access this area, from the **Content** left panel icon, using a similar path to this one: *Your Site/Site Root/_Widgets/Locations/*, access the **Location Results** widget (also referred to as **List Widget**, or Search Results Widget). Double-click to open **Location Results**. **Providers**, **Locations** and **Events** each have a **List Widget**.



This is the **Preview** of a sample page. Hover over the top-left corner of the page. Click the **Configure** button that displays.



Here, you can create or revise your layout, with fields you want displayed. Notice the top section in the screen below, with drop-down selections: **Content App** = *Locations*, **View** = *List View*, **Layout** = *Search Results*. Just below this section, click the **Settings** tab.

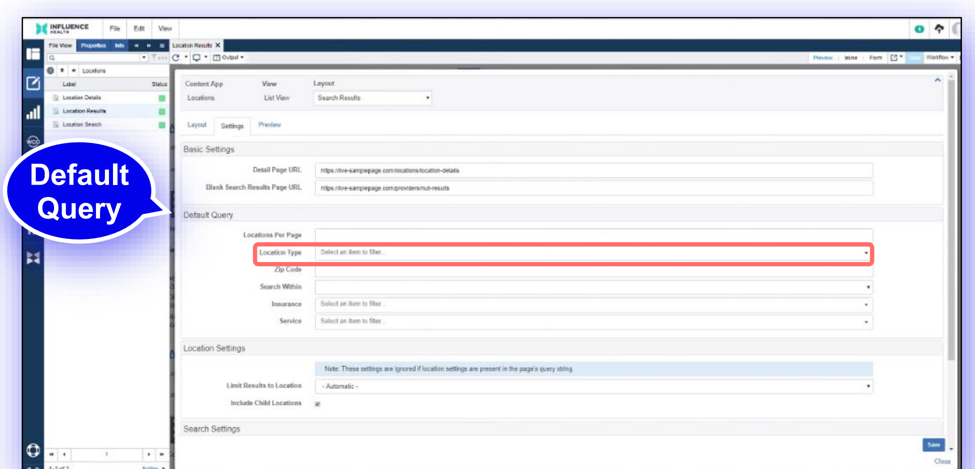


The **Settings** tab screen that opens has four sections, with fields in each section. Here, is where you can configure your **Default Query**. Each selection is restricted by the one above it.

- **Basic Settings**
- **Detail Page URL** (Enter the detail page link users will be redirected to if there are search results.)
- **Blank Search Results Page URL** (Enter the page link users will be redirected to if there are no search results.)

Default Query

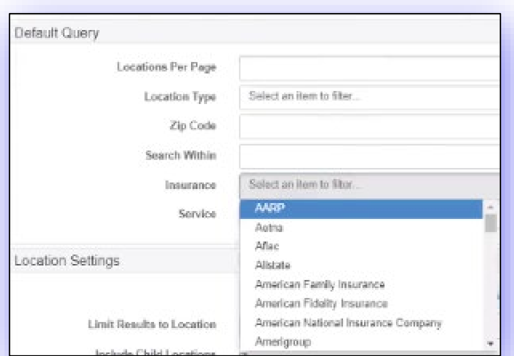
- **Locations Per Page** (Enter a number of locations to display per page, if desired.)
- **Location Type** (Configurable drop-down options. See **Working with Location Types**. Sample selections shown further below are: *Departments, Locations, PrintableProviderDirectory, Provider Office, Regions, Services and Site.*)
- **ZIP Code** (Enter a ZIP code to narrow your **Location Type** selection to a specified geographical area.)
- **Search Within**
- **Insurance** (Refine your search to the configured health insurance drop-down options.)
- **Service** (Refine your search to the configured health insurance drop-down options. Sample selections may include provided services such as: *MRI, Surgery or Imaging.*)
- **Content Settings** (Note the screen reference: These settings are ignored if location settings are present in the page's query string.)
- **Limit Results to Location** (Make a selection here if you wish to restrict the display to a specific location.)
- **Include Child Locations**



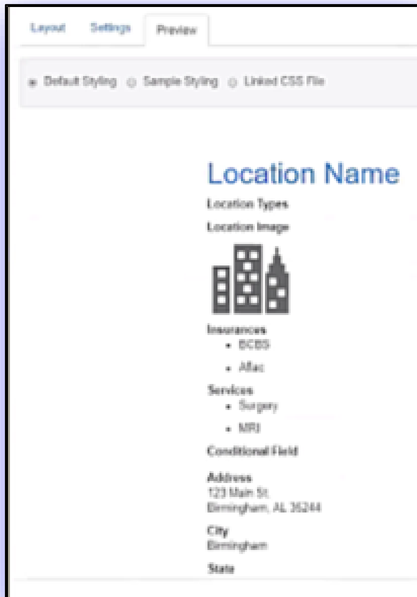
Search Settings

There is a new field in the **Default Query** section, called **Location Type**. A typical scenario may be placing this widget on your home page with a selected location type of *Provider Office*, to display its query results.
You can continue to refine your default query using the fields in this section. Restrict your selected

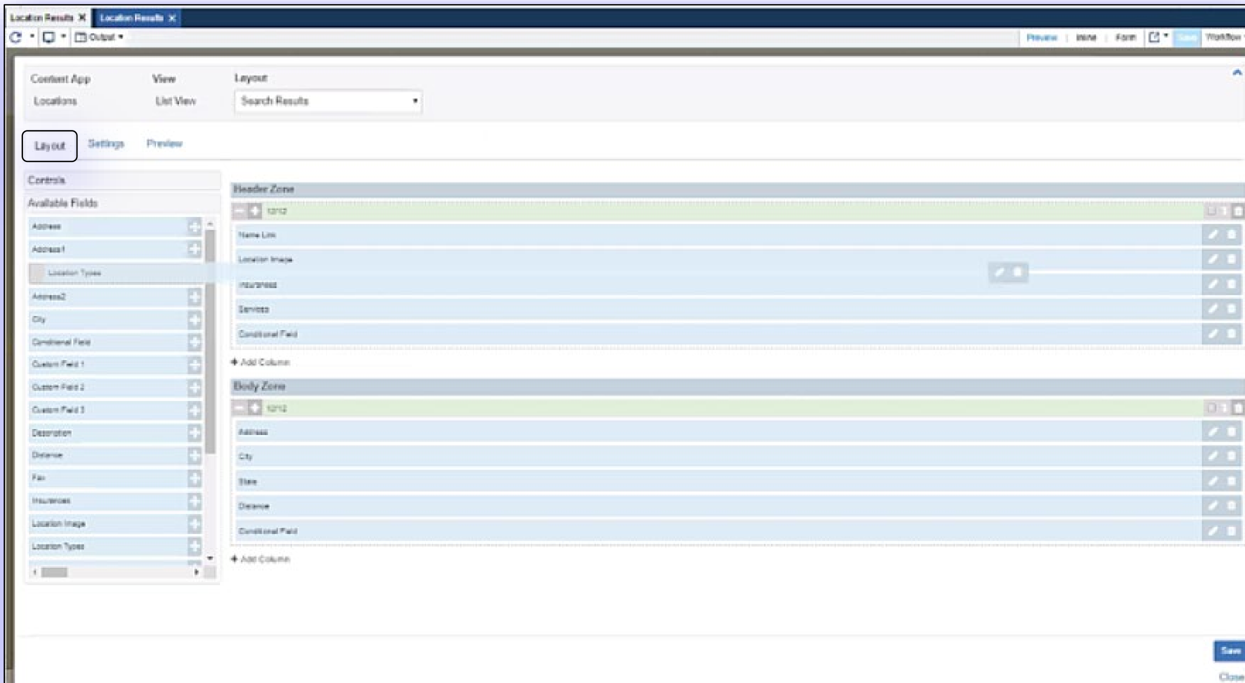
Location Type of *Provider Office* to an entered **ZIP Code**, for example, or select only *Provider Office* **Location Types** that accept a selected **Insurance**.



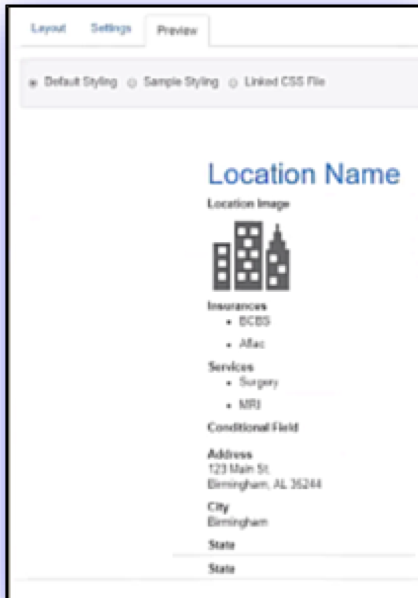
Click the **Preview** tab to see what the selected data for your **Default Query** may look like on our sample published page.



You can control what elements *display* on your page in the **Layout** tab. Below, we are dragging the **Location Types** field off the **Header Zone**, back onto the **Available Fields** panel.



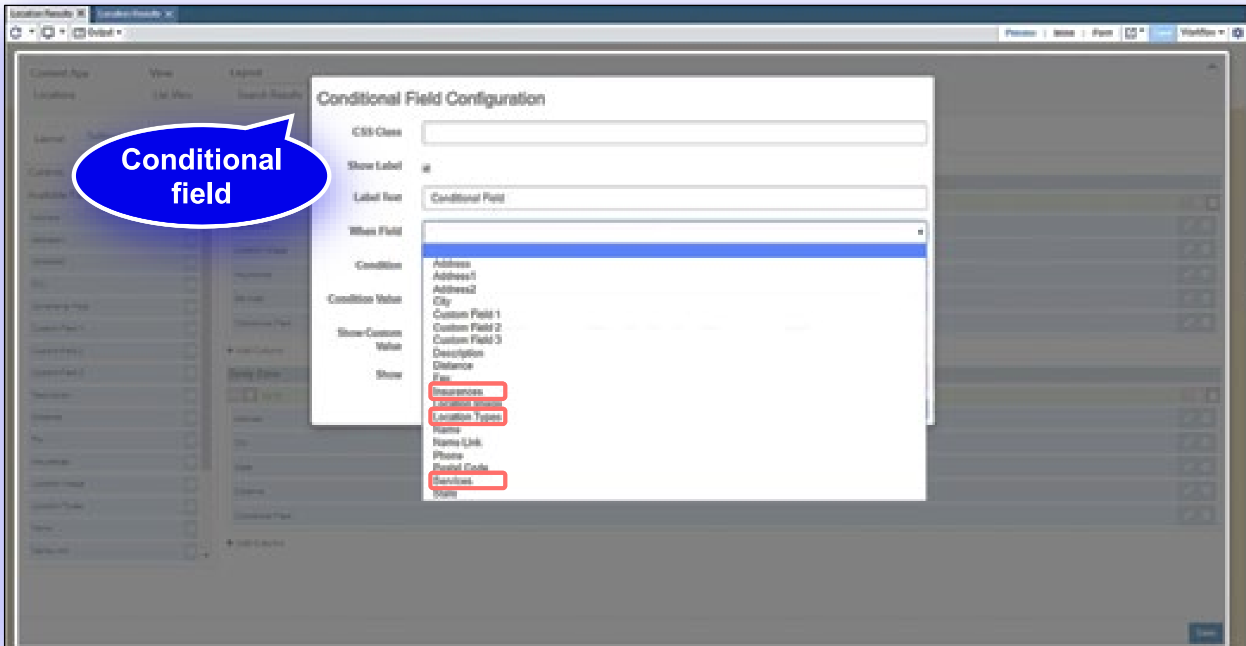
Now, let's preview the page again. **Location Types** is gone (from view), but not forgotten (in your **Default Query**)!



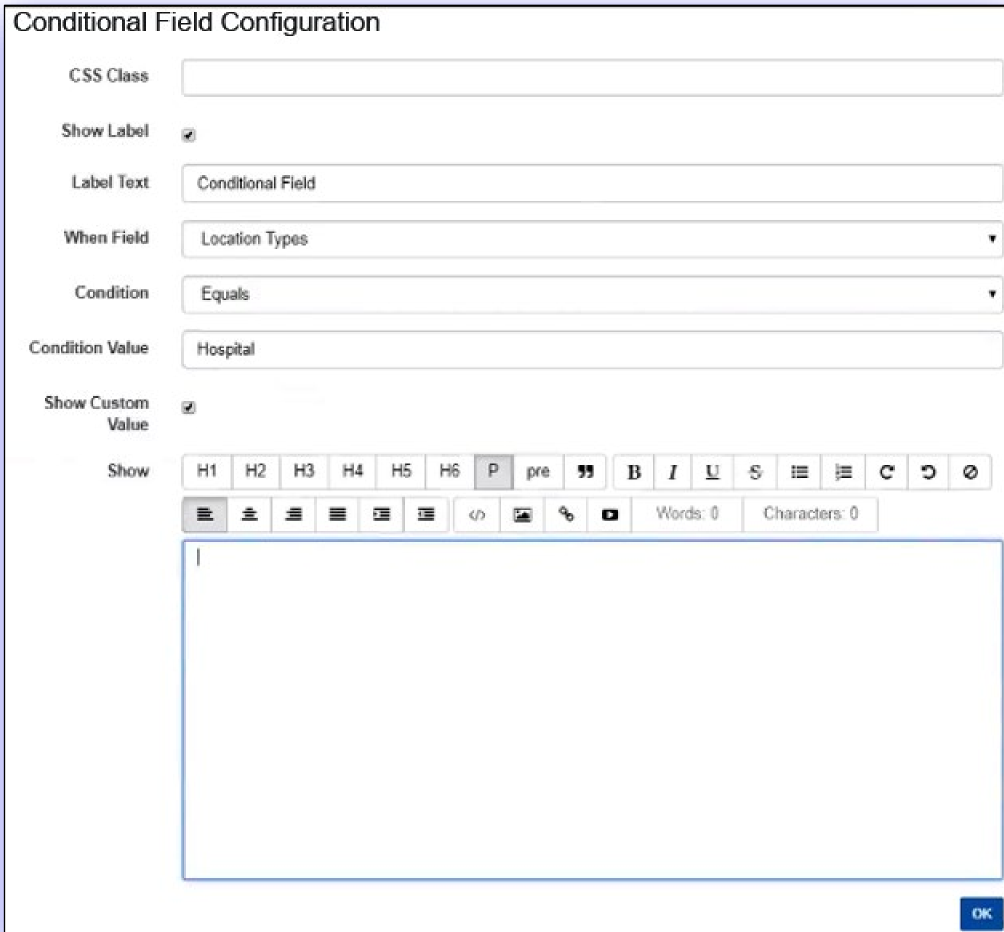
Default Query enables you to pull and display a list of data on your page when it loads.

HOW TO USE THE CONDITIONAL FIELD

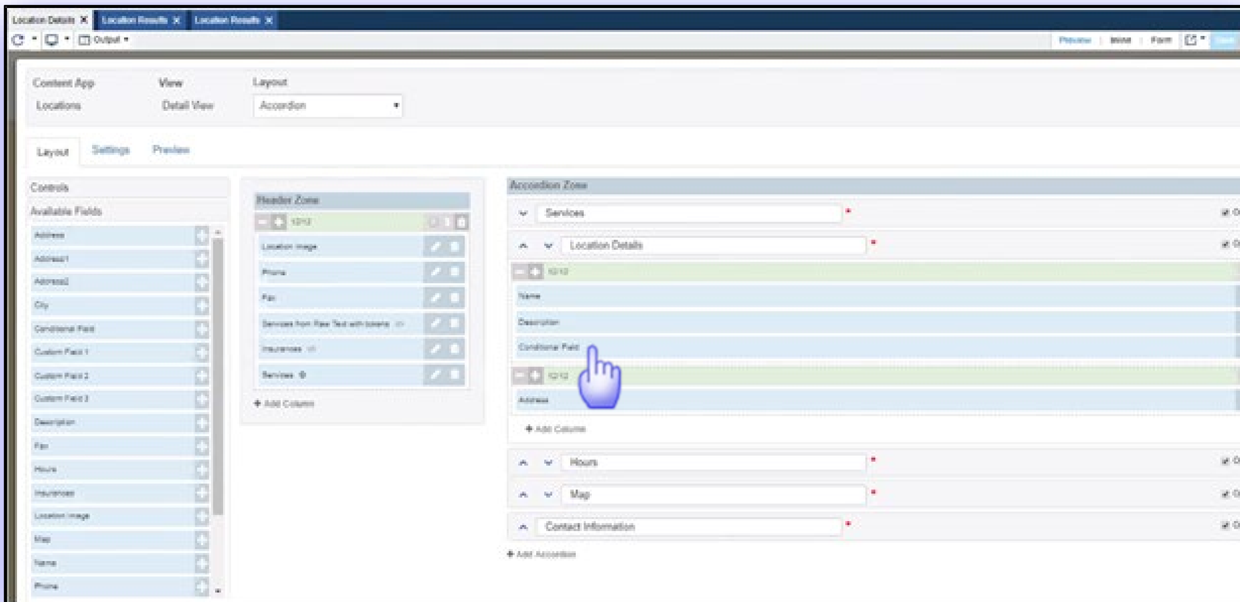
To demonstrate another recent feature enhancement, we dragged the **Conditional** field into our **Layout** and clicked the field to open it. The **When Field** drop-down options now include *Location Type*, *Insurances* and *Services*.



The **Conditional** dialog modifies the display of data based on conditional selections you make here, for example, the entries in the example below, create a condition of **When Field Location Types** = **Hospital**. If **Show Custom Value** is selected, the text or image you add in the **WYSIWYG Editor** will display *if* the condition is *True*.

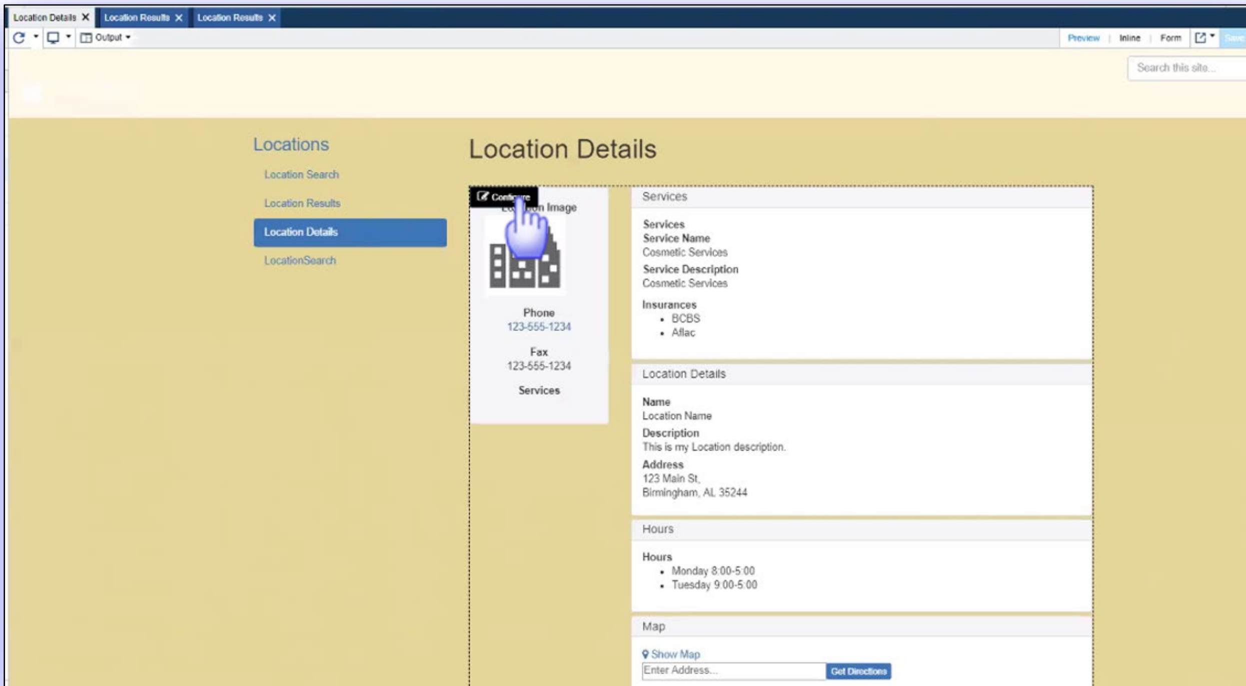


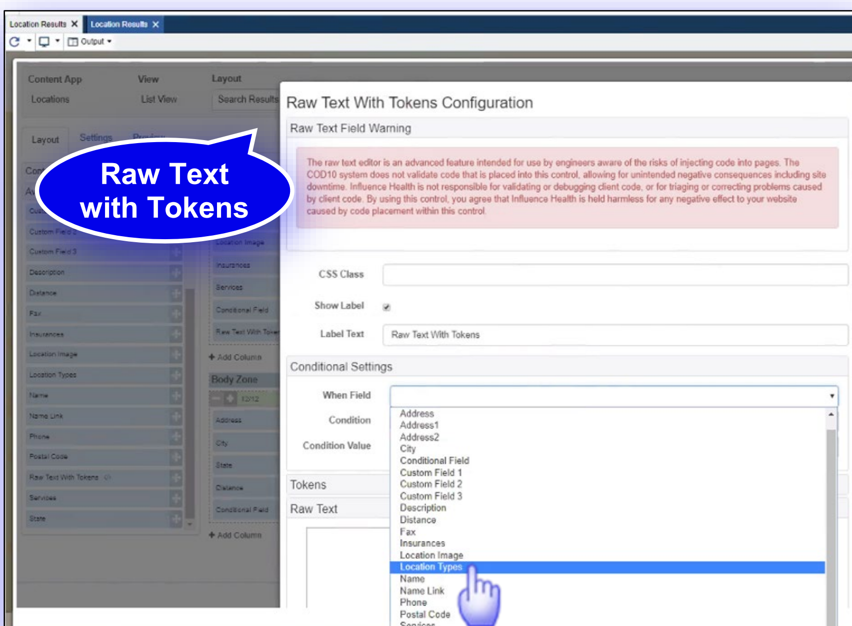
Similarly, dragging the **Raw Text with Tokens** field from here, then clicking the field opens the **Raw Text with Tokens** dialog, where you can set conditions.



The **When Field** drop-down options here also include *Location Type*, *Insurances* and *Services*. Similarly, **List Details** may be modified using this same set of functionality. Access **List Details** (named **Location Details** here) from **Site Root/_Widgets/Locations/** and repeat the steps above.

Here, from the preview page, hover at its top left and click **Configure**. Expand **Location Details**, drag and open the **Conditional** field.



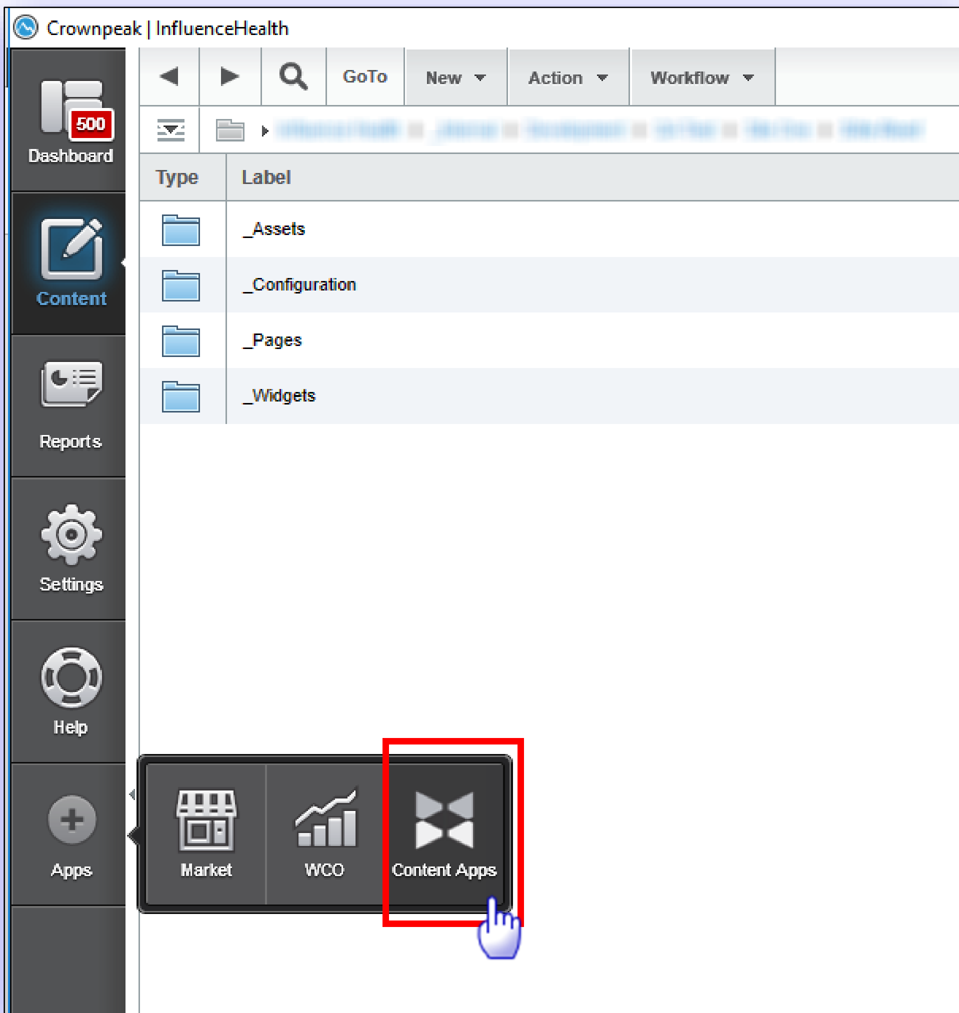


THE SERVICES CONTENT APP

The **Services** content app allows consumers to search for services that are associated with the health care organization. Here, services and associated content can be customized based on the health care organization's preferences.

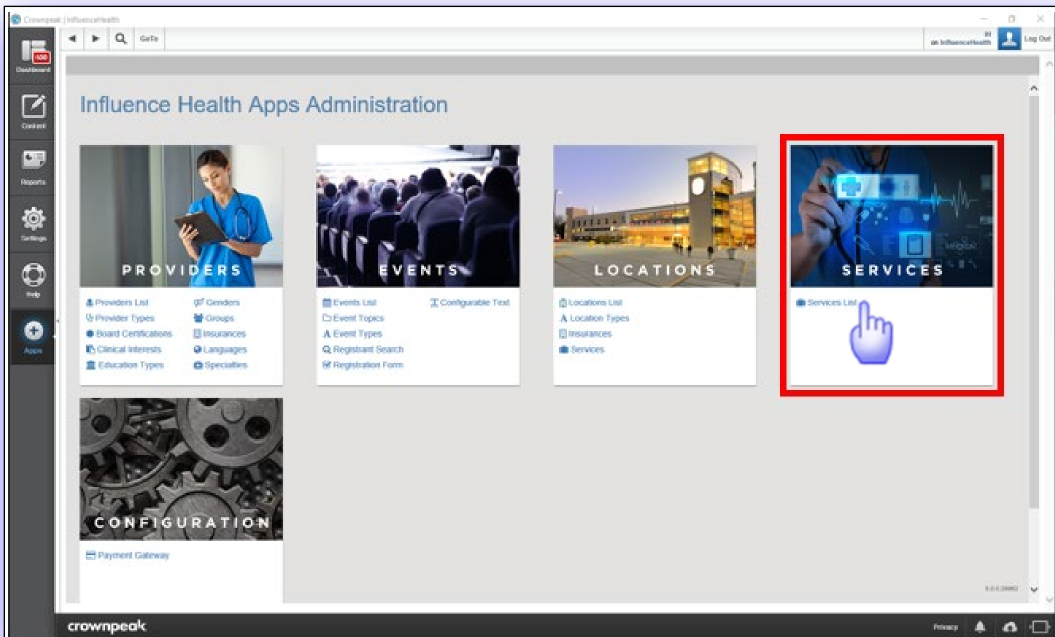
To Access the Services Content App

To access **Content App** components from anywhere within CMS, click the **Content Apps** option from within the **Apps** left menu, as shown in the screen image below.



The **Content Apps** console displays. From the **Content Apps** console, you can manage **Providers**, **Events**, **Locations**, **Services** and other configuration items. Each content app has its own menu of management items.

Click the **Services** widget, identified in red below, or the specific **Service List** link from the **Services** menu.

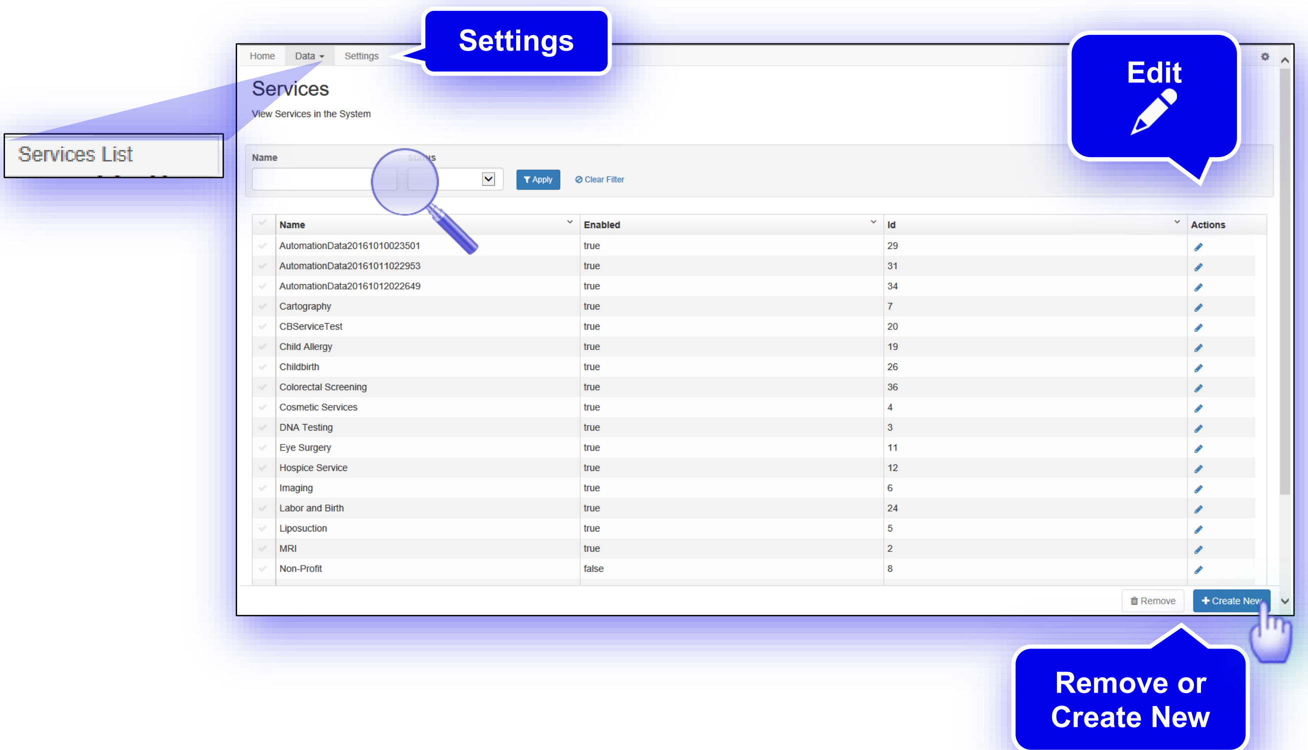


The Services Page

The **Services** list page displays. The **Services** page provides functionality for you to search (filter), edit or remove existing **Service** records, as well as to create new records.

From the **Services** page, you can perform the following actions:

- Search for a service record by **Name** and **Status** *(All, Enabled, Disabled).*
- **Create New** service records.
- **Edit** service records.
- **Remove** service records.



To Create a New Service

Click the **Create New** button, as shown above. The **New Service** screen displays, as shown below, on the following page of this document. Directly below, are descriptions of the fields in the screen that are used to create a new **Service** record.

- **ID** (This is the record identification number that is used by the system for data association purposes.)
- **Name** (This is the name of the service.)
- **Enabled** (This checkbox, if enabled, displays the service record.)
- **Description** (This field has a WYSIWYG editor, used for a rich text description of the service.)
- **Custom Keywords** (These are the custom keywords associated with the service.)
- **Generated Keywords** (These are system-generated keywords that are related to the service (non-editable).)

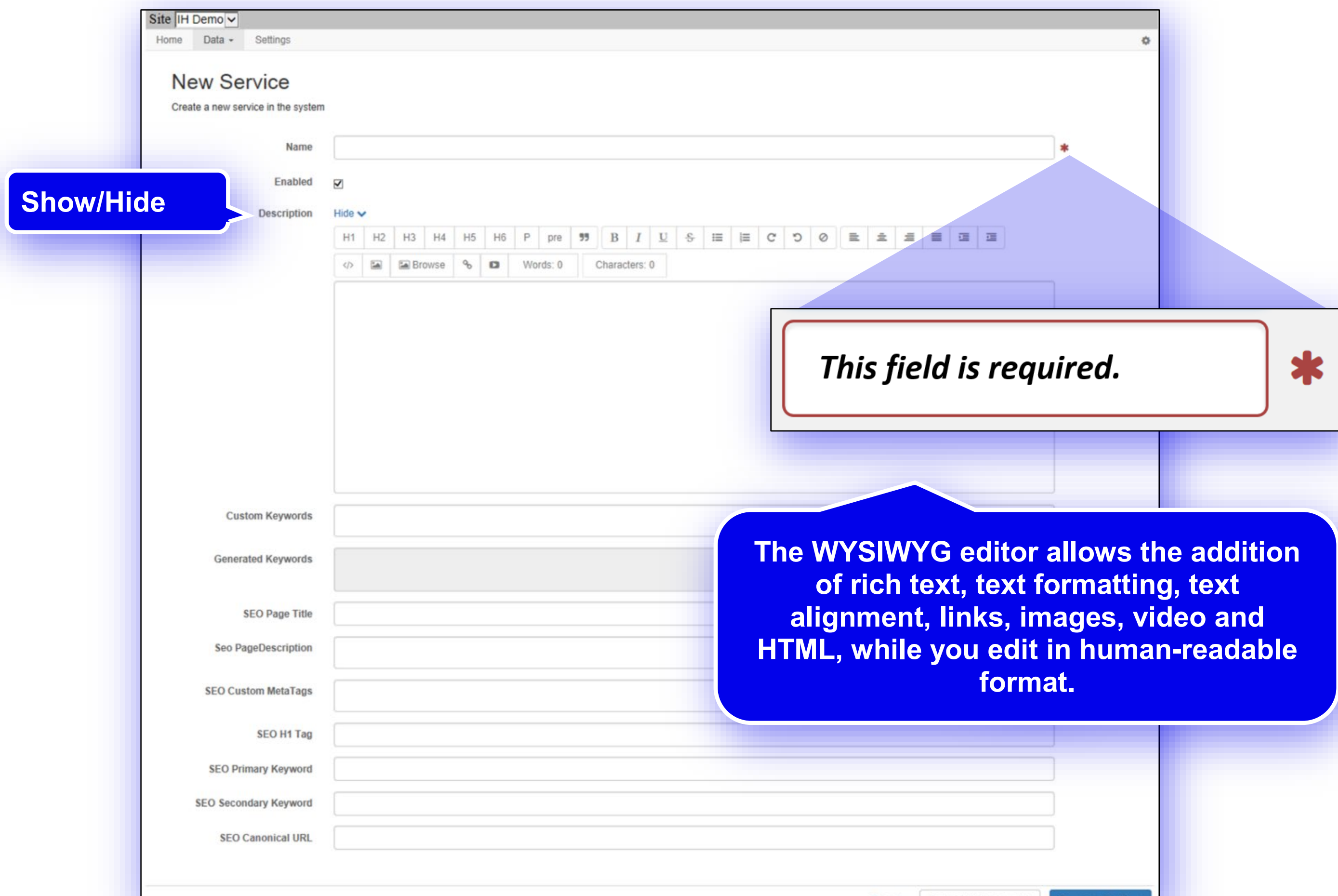
The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

- **SEO Page Title** (This is 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.

  The title element of a web page is a concise description of a page's content. Users can view the title in two places: as the page's name in the browser tab and in search results.)
- **SEO Page Description** (Also found in the <head> element, the **SEO Page Description** describes what a page is about in 150 characters or less. In search results, this returns as the main descriptive text.)
- **SEO Custom MetaTags** (Use custom meta tags to provide search engines with additional information about your pages that they use to create rich snippets or enable sorting of search results.)
- **SEO H1 Tag** (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.)
- **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.)

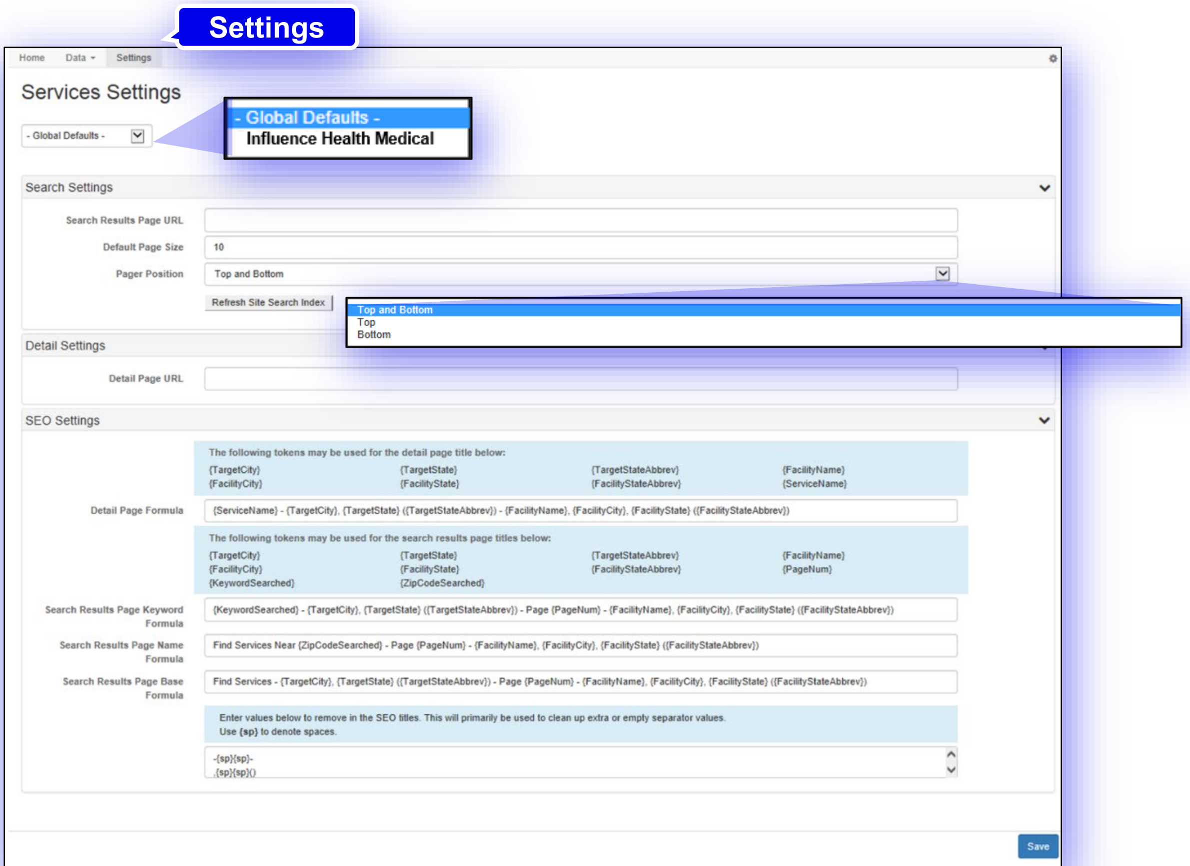
- **SEO Canonical URL** (The SEO Canonical URL tag attribute bears similarity to a 301 redirect, but it communicates to search engines that multiple pages should be considered as one, without actually redirecting visitors to the new URL, so that you can still track visitors separately to unique URL versions, such as: Payment Gateway (PayFlow Pro, Authorize.net). The term, canonical, refers to conforming to an accepted rule or procedure.)

Required fields display an asterisk.



Services Settings

The **Services Settings** page, available from the **Settings** tab, provides configuration options which are related to the **Services** content app: **Search Settings**, **Detail Settings** and **SEO Settings**.

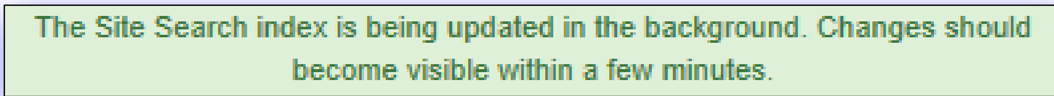


Services Settings Field Descriptions

From the **Search Settings** section, displayed above, complete the following fields:

- **Search Results Page URL** (Enter the URL of the **Services** search results page.)
- **Default page Size** (Enter the number of results records to display on the page.)
- **Pager Position** (Choose the page placement (*Top and Bottom, Top or Bottom*) of the pagination widget.)

- **Refresh Site Search Index** (Click this button to refresh, or rerun the site search index. A message displays indicating that the site search index is being updated in the background and that changes should be visible in a few minutes.)



From the **Detail Settings** section, displayed in the **Services Settings** image above, options are:

- **Detail Page URL** (Enter the full URL of the **Services** public page.)

The majority of consumers use search engines to make purchase decisions; therefore, top digital marketing organizations prioritize the practice of Search Engine Optimization (SEO). The following page elements are essential to SEO success, because combined, they communicate the essence of your message.

Our mission

SEO Settings

- Tokens[7] comprise the formulas that create each element. Consider them as objects. A list of available tokens is provided for each section. Copy and paste them in the fields in the order the chosen elements should appear, being mindful of syntax.

  You can also add static (non-dynamic) words around the tokens. The intent is to replace the contents of the token fields on the published page with data referenced from a list.

  From the **SEO Settings** section, options are:
- **Detail Page Formula** (Add or remove, or change the order of these tokens to form the **Services Detail Page**.)
  - **{TargetCity}**
  - **{TargetState}**
  - **{TargetStateAbbrev}**
  - **{FacilityName}**
  - **{FacilityCity}**
  - **{FacilityState}**
  - **{FacilityStateAbbrev}**

[7] A token, simply stated, is a symbolic representation of a larger piece of data.

- **{ServiceName}**

- **Search Results Page Keyword Formula** (This formula comprises the keyword search on the **Services** page, for example: Find {KeywordSearched}.)
- **Search Results Page Name Formula** (This formula comprises the **Search Results** page **Service Name**, for example: Find Services Near {ZipCodeSearched} - Page {PageNum}, etc.)
- **Search Results Page Base Formula** (This is a standard formula for the page title on search results, for example: Find Services in {TargetCity}, {TargetState} ({TargetStateAbbrev}) - Page {PageNum} - {FacilityName}, {FacilityCity}, {FacilityState} ({FacilityStateAbbrev}.)

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CONTENT APPS - API INTEGRATION – EVENTS, OVERVIEW

This document provides API Integration information for the Events Content App within CMS.

Note:

This document is intended for users who are skilled in consuming Web services and have access to an applicable software application that allows this capability.

The API is RESTful and all requests are made up of properly-formatted HTTP requests. Appropriate URLs are defined in each corresponding section of this guide for each Content App.

Request Method and Content-Type

All requests use the HTTP **POST** method.

Content-Type: For all requests where data is being sent to the system in the request body, the content-type of the request can either be **text/xml** or **application/xml**.

Common Response Codes

The most common response codes are explained in the table below:

HTTP Response Code	Description
200 - OK	**The operation was successful.**
400 - Bad Request	**Client error. The information passed to the service method did not match what the server expected. This could be caused by XML passed to the method that did not match the schema for the method.**
403 - Forbidden	**Unauthorized. The credentials passed to the service method were incorrect or the account specified did not have the permissions to perform the action that was requested.**
500 - Internal Server Error	**Server error. The information passed to the service method matched what was expected syntactically, but the server was unable to process the request. This could be due to an invalid identifier passed within the XML to the method, an invalid value passed within the XML to the method, or the information specified an action that violated business rules for the method.**

Working with XML in Request/Response Bodies

All data sent to the server and returned from the server will be sent as XML. This section describes several things to keep in mind while working with the request/response XML.

Request/Response NULL Fields

Fields in the request/response XML can be set to **Null** in 2 ways:

- **The field has been identified as Null by its "nil" attribute** – When a field contains the attribute **i:nil="true",** then its value will be **Null**. In the example below, **MiddleName** has been defined as a null field while **PictureId** is an empty node. In any response from the server, all null fields will be represented in this way.

```
<OrgUnitId>501</OrgUnitId>
<MiddleName i:nil="true"/>
<PictureId/>
```

See the Namespaces section below, for the namespace needed when using this notation.

- **The field has been omitted from the request** – When a field is not present in the request, then that field value will be **Null**. The example below will be seen by the server exactly the same as method 1 above:
-

```
<OrgUnitId>501</OrgUnitId>
<PictureId/>
```

Namespaces

In most cases, no XML Namespace is required when sending data to the server. The one exception is when using the **i:nil="true"** notation to represent null fields. In this case the following namespace should be included in the root node of the request.

```
xmlns:i=http://www.w3.org/2001/XMLSchema-instance
```

Null Fields vs. Empty Nodes When Updating Data

In order to simplify the process of updating data through the API, null fields and empty nodes are treated differently. It is important to realize these differences and understand how the server will treat these fields in a request.

See Request/Response Null Fields to see how null fields and empty nodes are defined differently.

- **Null Fields** – When a null field is sent to the server during an “Update” request, the server ignores this field.
- **Empty Nodes** – When an empty node is sent to the server, the server removes or deletes that value.

In the example below, **OrgUnitId** will be updated to the value 501, **MiddleName** will be ignored (i.e. it’s previously existing value will not be altered), and **PictureId** will be deleted from the entity.

```
<OrgUnitId>501</OrgUnitId>
<MiddleName i:nil="true"/>
<PictureId/>
```

AUTHENTICATION
CMS now requires token-based authentication to utilize the API. Authentication is achieved by passing an Authorization Header Value, using the Authenticate method and retrieving the token that will be used in all subsequent API methods within a given time frame.

Several steps are involved in creating the Authorization Header Value.

- Work with Healthgradesth to receive an API user and password.
- Format a string in the following format:
- <Content Apps User>:<Content Apps Password> (example: APIUser:MyP@ssWord)
- Convert the string to binary.
- Base64 encode the string.
- Prepend the Base64 string with the text: "Basic ".
-

```
Example authentication code:  Basic ZnVsY3J1bWFkncbOkVBMV9xYWI=
```

To authenticate, create a request with the following URL (where Instance Name is the name of your instance) with a POST request type:
https://contentapps.influencehealth.com/<instance name>/api/public/v1/authenticate/

Pass a header in the following format:

```
Authorization:<Authorization Header Value>
```

Example Header:

```
Authorization:Basic ZnVsY3J1bWFkncbOkVBMV9xYWI=
```

The response will include a token in JSON format that you will use to access the API for all subsequent methods.

```
{
"Token" : "221b2aad-ad56-4cd6-934d-233eb4970faf"
}
```

For each API request, include the token as a header in the following format:

```
AuthorizationToken:<token>
```

Example Header:

```
AuthorizationToken:221b2aad-ad56-4cd6-934d-233eb4970faf
```

EVENTS

Endpoint URL
For all Events API requests, the service endpoint URL is shown below:

```
http[s]://<host url>/_vti_bin/MEDSEEK/EventServiceV2.svc
```

Request

Request URL:

```
<endpoint URL>/events
```

Request Body: None

Paging (Optional)

We've now added Paging functionality in this request. Paging can be achieved by appending the page and **pageSize** parameters to the query string:

```
<endpoint URL>/events?page=3&pageSize=10
```

Response

The response XML will return an array of **EventSearchResultPortalDto** nodes. Each node represents an event in the system:


```
<ArrayOfEventSearchResultPortalDto
xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.Events.Common.S
earch" xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<EventSearchResultPortalDto> <AllGroupDiscountDescriptions/>
<Availability>29</Availability> <CancellationMessage i:nil="true"/> <CustomKeywords
i:nil="true"/> <DirectUrl>2011-clinical-trials-administration</DirectUrl>
<EffectiveCost>10.0000</EffectiveCost> <EffectiveLocationName>Lakeland Community
Hospital</EffectiveLocationName> <ExternalUrl i:nil="true"/>
<GroupDiscountDescriptions
xmlns:a="http://schemas.microsoft.com/2003/10/Serialization/Arrays"/>
<HasGroupDiscountCodes>false</HasGroupDiscountCodes>
<HasMultipleOccurrences>false</HasMultipleOccurrences> <Id>39</Id> <ImagePath
i:nil="true"/> <IsCanceled>false</IsCanceled>
<IsNotificationListEnabled>true</IsNotificationListEnabled>
<IsRegistrationEnabled>true</IsRegistrationEnabled> <Keywords i:nil="true"/>
<MaximumAttendees>30</MaximumAttendees>
<ShowExternalUrlWarning>true</ShowExternalUrlWarning>
<SingleOccurrenceId>39</SingleOccurrenceId> <StartDateFormatted>Sunday, June 08,
2014, 10:26 AM</StartDateFormatted> <Title>2011 Clinical Trials
Administration</Title> <AllowEventCart>false</AllowEventCart>
<CurrentlyInCart>false</CurrentlyInCart> <Custom1 i:nil="true"/> <Custom2
i:nil="true"/> <Custom3 i:nil="true"/> <DistanceUnit i:nil="true"/>
<EffectiveAddress1>42024 Highway 195 E Post Office Box 780</EffectiveAddress1>
<EffectiveAddress2/> <EffectiveCity>Haleyville</EffectiveCity>
<EffectivePostalCode>35565</EffectivePostalCode>
<EffectiveState>Alabama</EffectiveState> <EndDateFormatted>10:26
AM</EndDateFormatted> <EventTopicId>6</EventTopicId> <EventTypeId>1</EventTypeId>
<ExternalId/> <ExternalUrl/> <MostProximateLocationCompleteAddress i:nil="true"/>
<MostProximateLocationDistance i:nil="true"/> <MostProximateLocationName
i:nil="true"/> <SpecialInstructions i:nil="true"/> <SummaryDescription>A class that
focuses on 2012 Clinical Trials Administration</SummaryDescription>
</EventSearchResultPortalDto>
<EventSearchResultPortalDto>
<...>
</EventSearchResultPortalDto>
<EventSearchResultPortalDto>
<...>
</EventSearchResultPortalDto>
</ArrayOfEventSearchResultPortalDto
```

Get Specific Event Request

Request by Internal ID

Request URL:

```
<endpoint URL>/events/externalId/<externalId>
```

In the example above, <Id> should be replaced with the Event Id.

Request Body: None

Request by External ID

Request URL:

```
<endpoint URL>/events/externalId/<externalId>
```

In the example above, <externalId> should be replaced with the Event External Id.

Request Body: None

Response

The response XML will return an **EventDetailViewModelV2** node which contains a single **Event** node and also include all Event Occurrences inside the **Occurrences** node.


```
<Eventdetailviewmodelv2 Xmlns:I="Http://Www.W3.Org/2001/Xmlschema-Instance">
<Event>
<Title>ACLS Provider Course</Title>
<Directurl>Acls-Provider-Course</Directurl>
<Summarydescription>a Class That Focuses on ACLS Provider Course
</Summarydescription>
<Eventtopic>ACLS CPR NRP COURSES
</Eventtopic>
<Eventtype>Class</Eventtype>
<Eventcontent>A Class That Focuses On &Lt;B> ACLS Provider Course
&Lt;/B>&Lt;Br/>&Lt;Br/></Eventcontent>
<Publishdate>03/11/2014 00:00:00</Publishdate>
<Unpublishdate>09/27/2014 00:00:00</Unpublishdate>
<Contactname>Bill Gates</Contactname> <Contactemail>Blah@Test.Com</Contactemail>
<Contactphone>205-555-1234</Contactphone> <Maximumattendees>30</Maximumattendees>
<Cost>0.0000</Cost> <Isenabled>True</Isenabled> <Externalurl/>
<Orgunitid I:Nil="True"/> <Imagepath I:Nil="True"/> <Pictureid I:Nil="True"/>
```

```
<Internalonly>False</Internalonly> <Publiconly>False</Publiconly> <Costcenter/>
<Paymentprocessorconfigurationid I:Nil="True"/>
<Isnotifycontactenabled>True</Isnotifycontactenabled>
<Notificationfrequency>Immediately</Notificationfrequency>
<Eventexternalid I:Nil="True"/> <Keywords>Acls Cpr Nrp Courses</Keywords>
<Customkeywords I:Nil="True"/> <Isregistrationenabled>True</Isregistrationenabled>
<Isnotificationlistenabled>True</Isnotificationlistenabled> <Discountcodes/>
<Specialinstructions/> <Custom1/> <Custom2/> <Custom3/> <Eventid>2</Eventid>
</Event> <Occurrences> <Eventoccurrence> <Credentials I:Nil="True"/>
<Eventid>2</Eventid> <Eventexternalid I:Nil="True"/> <Isenabled>True</Isenabled>
<Orgunitid>501</Orgunitid> <Orgunitexternalid I:Nil="True"/> <Locationorgunitid
I:Nil="True"/> <Locationorgunitexternalid I:Nil="True"/> <Locationname
I:Nil="True"/> <Address1>849 South Three Notch Street</Address1> <Address2/>
<City>Andalusia</City> <State I:Nil="True"/> <Postalcode>36420</Postalcode>
<Country I:Nil="True"/> <Latitude I:Nil="True"/> <Longitude I:Nil="True"/>
<Contactname>James Mcgowers</Contactname>
<Contactemail>Blah@Test.Com</Contactemail> <Contactphone>205-555-
1234</Contactphone> <Maximumattendees>30</Maximumattendees> <Presenter>James
Mcgowers</Presenter> <Cost>0.0000</Cost> <Costcenter I:Nil="True"/>
<Registrationstartdate>03/11/2014 10:26:39</Registrationstartdate>
<Registrationenddate>06/08/2014 10:26:39</Registrationenddate>
<Ispricescheduleenabled>False</Ispricescheduleenabled> <Earlycost I:Nil="True"/>
<Earlycostenddate I:Nil="True"/> <Earlycostenddays I:Nil="True"/> <Latecost
I:Nil="True"/> <Latecoststartdate I:Nil="True"/> <Latecoststartdays I:Nil="True"/>
<Paymentprocessorconfigurationid I:Nil="True"/> <Dynamicformsid I:Nil="True"/>
<Publishorgunitentityassociations I:Nil="True"/> <Occurrenceexternalid
I:Nil="True"/>
<Isregistrationenabled>True</Isregistrationenabled>
<Isnotificationlistenabled>True</Isnotificationlistenabled>
<Isnotifycontactenabled>True</Isnotifycontactenabled> <Specialinstructions
I:Nil="True"/> <Eventoccurrencedates> <Eventoccurrencedate> <Startdate>06/08/2014
10:26:39</Startdate> <Enddate>06/08/2014 10:26:39</Enddate> </Eventoccurrencedate>
</Eventoccurrencedates> <Occurrenceid>2</Occurrenceid> </Eventoccurrence>
</Occurrences> </Eventdetailviewmodelv2>
```


The **Event** node in this response is presented in the same format as the request body for the Add Event request (except for the **EventId** node) as well as the **Update Event** request.

Inside the **Occurrences** node, each **EventOccurrence** node is presented in the same format as the request body for the Add Event Occurrence request (except for the **OccurrenceId** node) as well as the **Update Event Occurrence** request.

Add Event Request

Request

Request URL:

```
<endpoint URL>/Add Event
```

Request Body:

The request body is in the same format as the Event node from the response from the Get Specific Event Request, except for the Credentials and EventId .

The **Credentials** must be supplied as the first child node of the request.

The **EventId** will be generated when the event is added, and therefore cannot be specified when adding an event.

An **EventExternalId** may be specified in order to keep records in sync with an external system. Events can later be queried through this API via the **EventExternalId**.


```
<Event xmlns:i="http://www.w3.org/2001/XMLSchema - instance">
<Credentials>
<UserName>Username Goes Here</UserName> <Password>Password Goes Here</Password>
</Credentials> <Title>ACLS Provider Course</Title> <DirectUrl>acls-provider-
course</DirectUrl> <SummaryDescription>A class that focuses on ACLS Provider
Course</SummaryDescription> <EventTopics> <EventTopic> <Name>ACLS CPR NRP
COURSES</Name> </EventTopic> <EventTopic> <Name>Cancer Support</Name> </EventTopic>
</EventTopics> <EventTypes> <EventType> <Name>Class</Name> </EventType> <EventType>
<Name>Presentation</Name> </EventType> </EventTypes <EventContent>A class that
focuses on &lt;b> ACLS Provider Course &lt;/b>&lt;br/>&lt;br/></EventContent>
<PublishDate>03/11/2014 00:00:00</PublishDate> <UnpublishDate>09/27/2014
00:00:00</UnpublishDate> <ContactName>Bill Gates</ContactName>
<ContactEmail>blah@test.com</ContactEmail> <ContactPhone>205-555-
1234</ContactPhone> <MaximumAttendees>30</MaximumAttendees> <Cost>0.0000</Cost>
<IsEnabled>true</IsEnabled> <ExternalUrl/> <OrgUnitId i:nil="true"/> <ImagePath
i:nil="true"/> <PictureId i:nil="true"/> <InternalOnly>false</InternalOnly>
<PublicOnly>false</PublicOnly> <CostCenter/> <PaymentProcessorConfigurationId
i:nil="true"/> <IsNotifyContactEnabled>true</IsNotifyContactEnabled>
<NotificationFrequency>Immediately</NotificationFrequency> <EventExternalId
i:nil="true"/> <Keywords>acls cpr nrp courses</Keywords> <CustomKeywords
i:nil="true"/> <IsRegistrationEnabled>true</IsRegistrationEnabled>
<IsNotificationListEnabled>true</IsNotificationListEnabled> <DiscountCodes/>
<SpecialInstructions/> <Custom1/> <Custom2/> <Custom3/>
</Event>
```

equired Fields

The following fields are required when adding an event:

- **Title**
- **DirectUrl**
- **SummaryDescription**
- **Topic**
- **Type**

Update Event Request

Request

Request URL:

```
<endpoint URL>/Update Event
```

Request Body:

The request body is in the same format as the Event node from the response from the Get Specific Event Request, except for the Credentials.

The **Credentials** must be supplied as the first child node of the request.


```
<Event xmlns:i="http://www.w3.org/2001/XMLSchema-instance"> <Credentials>
<UserName>Username Goes Here</UserName> <Password>Password Goes Here</Password>
</Credentials> <Title>ACLS Provider Course</Title> <DirectUrl>acls-provider-
course</DirectUrl> <SummaryDescription>A class that focuses on ACLS Provider
Course</SummaryDescription> <EventTopics> <EventTopic> <Name>ACLS CPR NRP
COURSES</Name> </EventTopic> <EventTopic> <Name>Cancer Support</Name> </EventTopic>
</EventTopics> <EventTypes>
<EventType> <Name>Class</Name> </EventType> <EventType> <Name>Presentation</Name>
</EventType> </EventTypes <EventContent>A class that focuses on &lt;b> ACLS
Provider Course &lt;/b>&lt;br/>&lt;br/></EventContent> <PublishDate>03/11/2014
00:00:00</PublishDate> <UnpublishDate>09/27/2014 00:00:00</UnpublishDate>
<ContactName>Bill Gates</ContactName> <ContactEmail>blah@test.com</ContactEmail>
<ContactPhone>205-555-1234</ContactPhone> <MaximumAttendees>30</MaximumAttendees>
<Cost>0.0000</Cost> <IsEnabled>true</IsEnabled> <ExternalUrl/> <OrgUnitId
i:nil="true"/> <ImagePath i:nil="true"/> <PictureId i:nil="true"/>
<InternalOnly>false</InternalOnly> <PublicOnly>false</PublicOnly> <CostCenter/>
<PaymentProcessorConfigurationId i:nil="true"/>
<IsNotifyContactEnabled>true</IsNotifyContactEnabled>
<NotificationFrequency>Immediately</NotificationFrequency> <EventExternalId
i:nil="true"/> <Keywords>acls cpr nrp courses</Keywords> <CustomKeywords
i:nil="true"/> <IsRegistrationEnabled>true</IsRegistrationEnabled>
```

```
<IsNotificationListEnabled>true</IsNotificationListEnabled> <DiscountCodes/>
<SpecialInstructions/> <Custom1/> <Custom2/> <Custom3/> <EventId>2</EventId>
</Event>
```


Get Specific Event Occurrence Request

Request By Internal Id

Request URL:

```
<endpoint URL>/occurrence/<Id >
```

In the example above, <Id> should be replaced with the OccurrenceId.

Request Body: None

Request by External ID

Request URL:

```
<endpoint URL>/occurrence/externalId/<externalId>
```

In the example above, <externalId> should be replaced with the Occurrence External Id.

Request Body: None

Response

The response XML will return a single **EventOccurrence** node:


```
<EventOccurrence xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<EventId>1</EventId> <EventExternalId i:nil="true"/> <IsEnabled>true</IsEnabled>
<OrgUnitId>500</OrgUnitId> <OrgUnitExternalId i:nil="true"/> <LocationOrgUnitId
i:nil="true"/> <LocationOrgUnitExternalId i:nil="true"/> <LocationName>River Falls
Area Hospital</LocationName> <Address1>1629 E Division St</Address1> <Address2/>
<City>River Falls</City> <State>Wisconsin</State> <PostalCode>54022</PostalCode>
<Country i:nil="true"/> <Latitude i:nil="true"/> <Longitude i:nil="true"/>
<ContactName>Kiki Dee</ContactName>
<ContactEmail>kikidee@medseek.com</ContactEmail>
<ContactPhone>4068458569</ContactPhone> <MaximumAttendees>30</MaximumAttendees>
<Presenter>Kiki Dee</Presenter> <Cost>0.0000</Cost> <CostCenter i:nil="true"/>
<RegistrationStartDate>03/11/2014 16:08:06</RegistrationStartDate>
<RegistrationEndDate>06/08/2014 16:08:06</RegistrationEndDate>
<IsPriceScheduleEnabled>false</IsPriceScheduleEnabled> <EarlyCost i:nil="true"/>
<EarlyCostEndDate i:nil="true"/> <EarlyCostEndDays i:nil="true"/>
<LateCost i:nil="true"/> <LateCostStartDate i:nil="true"/> <LateCostStartDays
i:nil="true"/> <PaymentProcessorConfigurationId i:nil="true"/> <DynamicFormsId
i:nil="true"/> <PublishOrgUnitEntityAssociations i:nil="true"/>
<OccurrenceExternalId i:nil="true"/>
<IsRegistrationEnabled>true</IsRegistrationEnabled>
<IsNotificationListEnabled>true</IsNotificationListEnabled>
<IsNotifyContactEnabled>true</IsNotifyContactEnabled> <SpecialInstructions
i:nil="true"/> <EventOccurrenceDates> <EventOccurrenceDate> <StartDate>06/08/2014
16:08:06</StartDate> <EndDate>06/08/2014 16:08:06</EndDate> </EventOccurrenceDate>
</EventOccurrenceDates> <OccurrenceId>1</OccurrenceId> </EventOccurrence>
```


The **EventOccurrence** node is presented in the same format as the request body for the Add Event Occurrence request (except for the OccurrenceId node), as well as the Update Event Occurrence request.

Add Event Occurrence Request

Request

Request URL:

```
<endpoint URL>/AddEventOccurrence
```

REQUEST BODY:

The request body is in the same format as the **EventOccurrence** node from the response from the Get Specific Event Occurrence Request, except for the **Credentials** and **OccurrenceId**.

The Credentials must be supplied as the first child node of the request.

The **OccurrenceId** will be generated when the event is added, and therefore cannot be specified when adding an event.

An **OccurrenceExternalId** may be specified in order to keep records in sync with an external system. Occurrences can later be queried through this API via the **OccurrenceExternalId**.


```
<EventOccurrence xmlns:i="http://www.w3.org/2001/XMLSchema-instance"> <Credentials>
<UserName>Username Goes Here</UserName> <Password>Password Goes Here</Password>
</Credentials> <EventId>1</EventId> <EventExternalId i:nil="true"/>
<IsEnabled>true</IsEnabled> <OrgUnitId>500</OrgUnitId> <OrgUnitExternalId
i:nil="true"/> <LocationOrgUnitId i:nil="true"/> <LocationOrgUnitExternalId
i:nil="true"/> <LocationName>River Falls Area Hospital</LocationName>
<Address1>1629 E Division St</Address1> <Address2/> <City>River Falls</City>
<State>Wisconsin</State> <PostalCode>54022</PostalCode> <Country i:nil="true"/>
<Latitude i:nil="true"/> <Longitude i:nil="true"/> <ContactName>Kiki
Dee</ContactName> <ContactEmail>kikidee@medseek.com</ContactEmail>
<ContactPhone>4068458569</ContactPhone> <MaximumAttendees>30</MaximumAttendees>
<Presenter>Kiki Dee</Presenter> <Cost>0.0000</Cost> <CostCenter i:nil="true"/>
<RegistrationStartDate>03/11/2014 16:08:06</RegistrationStartDate>
<RegistrationEndDate>06/08/2014 16:08:06</RegistrationEndDate>
<IsPriceScheduleEnabled>false</IsPriceScheduleEnabled> <EarlyCost i:nil="true"/>
<EarlyCostEndDate i:nil="true"/> <EarlyCostEndDays i:nil="true"/> <LateCost
i:nil="true"/> <LateCostStartDate i:nil="true"/> <LateCostStartDays i:nil="true"/>
<PaymentProcessorConfigurationId i:nil="true"/> <DynamicFormsId i:nil="true"/>
<PublishOrgUnitEntityAssociations i:nil="true"/> <OccurrenceExternalId
i:nil="true"/> <IsRegistrationEnabled>true</IsRegistrationEnabled>
<IsNotificationListEnabled>true</IsNotificationListEnabled>
<IsNotifyContactEnabled>true</IsNotifyContactEnabled> <SpecialInstructions
i:nil="true"/> <EventOccurrenceDates> <EventOccurrenceDate> <StartDate>06/08/2014
16:08:06</StartDate> <EndDate>06/08/2014 16:08:06</EndDate> </EventOccurrenceDate>
</EventOccurrenceDates> </EventOccurrence>
```


Required Fields

The following fields are required when adding an event occurrence:

- **EventId or EventExternalId**
- **ContactName**
- **ContactEmail**
- **At least 1 EventOccurrenceDate with StartDate and EndDate**

Update Event Occurrence Request

Request
Request URL:

```
<endpoint URL>/UpdateEventOccurrence
```

Request Body:
The Request Body is in the same format as the **EventOccurrence** node, from the response from the Get Specific Event Occurrence Request, except for the Credentials.

Credentials must be supplied as the first child node of the request.


```
<EventOccurrence xmlns:i="http://www.w3.org/2001/XMLSchema-instance"> <Credentials>
<UserName>Username Goes Here</UserName> <Password>Password Goes Here</Password>
</Credentials> <EventId>1</EventId> <EventExternalId i:nil="true"/>
<IsEnabled>true</IsEnabled> <OrgUnitId>500</OrgUnitId> <OrgUnitExternalId
i:nil="true"/> <LocationOrgUnitId i:nil="true"/> <LocationOrgUnitExternalId
i:nil="true"/> <LocationName>River Falls Area Hospital</LocationName>
<Address1>1629 E Division St</Address1> <Address2/> <City>River Falls</City>
<State>Wisconsin</State> <PostalCode>54022</PostalCode> <Country i:nil="true"/>
<Latitude i:nil="true"/> <Longitude i:nil="true"/> <ContactName>Kiki
Dee</ContactName>
<ContactEmail>kikidee@medseek.com</ContactEmail>
<ContactPhone>4068458569</ContactPhone> <MaximumAttendees>30</MaximumAttendees>
<Presenter>Kiki Dee</Presenter> <Cost>0.0000</Cost> <CostCenter i:nil="true"/>
<RegistrationStartDate>03/11/2014 16:08:06</RegistrationStartDate>
<RegistrationEndDate>06/08/2014 16:08:06</RegistrationEndDate>
<IsPriceScheduleEnabled>false</IsPriceScheduleEnabled> <EarlyCost i:nil="true"/>
<EarlyCostEndDate i:nil="true"/> <EarlyCostEndDays i:nil="true"/> <LateCost
i:nil="true"/> <LateCostStartDate i:nil="true"/> <LateCostStartDays i:nil="true"/>
<PaymentProcessorConfigurationId i:nil="true"/> <DynamicFormsId i:nil="true"/>
<PublishOrgUnitEntityAssociations i:nil="true"/> <OccurrenceExternalId
i:nil="true"/> <IsRegistrationEnabled>true</IsRegistrationEnabled>
<IsNotificationListEnabled>true</IsNotificationListEnabled>
<IsNotifyContactEnabled>true</IsNotifyContactEnabled> <SpecialInstructions
i:nil="true"/> <EventOccurrenceDates> <EventOccurrenceDate> <StartDate>06/08/2014
16:08:06</StartDate> <EndDate>06/08/2014 16:08:06</EndDate> </EventOccurrenceDate>
</EventOccurrenceDates> <OccurrenceId>1</OccurrenceId> </EventOccurrence>
```

Get Event Registrants

Request Based on Start Date

Request URL:

```
<endpoint URL>/OccurrenceRegistrants?startDate={startDate}
```

Retrieves all event occurrence registrants that were registered after the specified startDate.

Request Body:

```
<Credentials>
<UserName>Username Goes Here </UserName>
<Password>Password Goes Here </Password>
</Credentials>
```

Response

The response XML will return a collection of **EventDto** nodes that contain relevant information about each event, occurrence, and attendee.

```
<ArrayOfEventsDto
xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.Events.Common.A
dmin.Attendees" xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<EventsDto>
<EventId>1</EventId>
<ExternalEventId i:nil="true"/>
<Occurrences>
<OccurrenceDto>
<Attendees>
<AttendeeDto>
<Address>85495 Spain Ct.</Address>
<AmountPaid>0.0000</AmountPaid>
<City>Birmingham</City>
<DidAttend i:nil="true"/>
<EmailAddress>Phyllis@hendrerit.us</EmailAddress>
<FirstName>Wylie</FirstName>
<Id>1</Id>
<LastName>Raja</LastName>
<Name>Wylie Raja</Name>
<Phone>271-118-0355</Phone>
<PostalCode>35244</PostalCode>
<RegistrationDate>2011-10-22T13:54:18.5</RegistrationDate>
<StateName>Alabama</StateName>
</AttendeeDto>
</Attendees>
```

```
<ExternalId i:nil="true"/>
<Id>1</Id>
</OccurrenceDto>
</Occurrences>
</EventsDto>
<EventsDto>
<...>
</EventsDto>
<EventsDto>
<...>
</EventsDto>
</ArrayOfEventsDto>
```

Get Specific Event Occurrence Registrants

Request by Internal Id

Request URL:

```
<endpoint
URL>/OccurrenceRegistrantsByOccurrenceId?eventOccurrenceId={eventOccurrenceId}
```

In the example above, **eventOccurrenceId** represents the internal id of the occurrence.

Request Body:

```
<Credentials>
<UserName>Username Goes Here </UserName>
<Password>Password Goes Here </Password>
</Credentials>
```

Request by External ID

Request URL:

```
<endpoint URL>/OccurrenceRegistrantsByExternalId?externalId={externalId}
```

In the example above, **externalId** represents the external id of the occurrence.

Request Body:

```
<Credentials> <UserName>Username Goes Here </UserName> <Password>Password Goes Here
</Password> </Credentials>
```

Response

The response XML will return a single **EventOccurrenceAttendeesViewModel** node, which contains relevant information about all attendees for a specified event occurrence.


```
<EventOccurrenceAttendeesViewModel
xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.Events.SharePoi
nt.ViewModels" xmlns:i="http://www.w3.org/2001/XMLSchema-instance"> <Attendees
xmlns:a="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.Events.Common
.Admin.Attendees"> <a:AttendeeDto> <a:Address>85495 Spain Ct.</a:Address>
<a:AmountPaid>0.0000</a:AmountPaid> <a:City>Birmingham</a:City> <a:DidAttend
i:nil="true"/> <a:EmailAddress>Phyllis@hendrerit.us</a:EmailAddress>
<a:FirstName>Wylie</a:FirstName> <a:Id>0</a:Id> <a:LastName>Raja</a:LastName>
<a:Name i:nil="true"/>
<a:Phone>2711180355</a:Phone>
<a:PostalCode>35244</a:PostalCode>
<a:RegistrationDate>2011-10-22T13:54:18.5</a:RegistrationDate>
<a:StateName>Alabama</a:StateName>
</a:AttendeeDto>
<a:AttendeeDto>
<...>
</a:AttendeeDto>
<a:AttendeeDto>
<...>
</a:AttendeeDto>
</Attendees>
<EventId>1</EventId>
<EventOccurrenceId>1</EventOccurrenceId>
</EventOccurrenceAttendeesViewModel>
```


Get Event Registrant Changes

Request Based on Date

Request URL:

```
<endpointURL>/GetEventOccurrenceRegistrantUpdates?changedSinceUtcDateTime={changedS
inceUtcDateTime}
```

Retrieves all event occurrence registrants that were registered or cancelled after the specified date/time.

Request Body:

```
<Credentials>
<Username>Username Goes Here </Username>
<Password>Password Goes Here </Password>
</Credentials>
```

Response

The response XML will return a single **EventOccurrenceAttendeeUpdatesDtoV2** node, which contains all newly registered and cancelled registrants for all events since the specified date/time.


```
<EventOccurrenceAttendeeUpdatesDtoV2
xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.Events.Common.A
pi.V2" xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
<EventInfo>
<EventsDtoV2>
<EventExternalId i:nil="true"/>
<EventId>1</EventId>
<Occurrences>
<OccurrenceDtoV2> <Attendees> <AttendeeDtoV2> <Address1>85495 Spain Ct.</Address1>
<Address2/> <AmountPaid>0.0000</AmountPaid> <City>Birmingham</City> <DidAttend
i:nil="true"/> <DynamicColumnData i:nil="true"/>
<EmailAddress>Phyllis@hendrerit.us</EmailAddress> <FirstName>Wylie</FirstName>
<Id>1</Id> <LastName>Raja</LastName> <Name i:nil="true"/> <Phone>271-118-
0355</Phone> <PostalCode>35244</PostalCode> <RegistrationDate>2011-10-
22T13:54:18.5</RegistrationDate> <StateName>Alabama</StateName> <UpdatedDate>2013-
05-01T00:00:00</UpdatedDate> </AttendeeDtoV2> </Attendees> <ExternalId
i:nil="true"/> <Id>1</Id> </OccurrenceDtoV2> </Occurrences> </EventsDtoV2>
<EventsDtoV2> <...> </EventsDtoV2> <EventsDtoV2> <...> </EventsDtoV2> </EventInfo>
<EventOccurrenceAttendeeCancellations/> <RequestReceivedDateTime>2014-03-
12T20:25:04.535278Z</RequestReceivedDateTime>
</EventOccurrenceAttendeeUpdatesDtoV2>
```

Add Event Occurrence Registrant Request

Add by Internal ID

Request URL:

```
<endpoint URL>/AddRegistrant?eventOccurrenceId={eventOccurrenceId}
```

In the example above, {**eventOccurrenceId**} should be replaced with the OccurrenceId.

Request by External ID

Request URL:

```
<endpoint URL>/AddRegistrantByExternalId?externalId={externalId}
```

In the example above, {externalId} should be replaced with the Occurrence External Id.

Request Body:

```
<Attendee> <Credentials> <UserName>Username Goes Here</UserName> <Password>Password
Goes Here</Password> </Credentials> <FirstName>Bob</FirstName>
<LastName>Barker</LastName> <Address1>200 Clinton Road</Address1> <Address2/>
<City>Birmingham</City> <StateAbbreviation>AL</StateAbbreviation>
<PostalCode>35244</PostalCode> <Phone>555-333-4567</Phone>
<EmailAddress>blah@blah.com</EmailAddress> <AmoundPaid>0</AmoundPaid>
<DidAttend>true</DidAttend> </Attendee>
```

Update Event Occurrence Registrant Request

Update by Internal ID

Request URL:

```
<endpoint URL>/UpdateRegistrant?eventOccurrenceId={eventOccurrenceId}
```

In the example above, {**eventOccurrenceId**} should be replaced with the OccurrenceId.

Request by External ID

Request URL:

```
<endpoint URL>/UpdateRegistrantByExternalId?externalId={externalId}
```

In the example above, {externalId} should be replaced with the Occurrence External Id.

The attendee to modify will be looked up based on the **FirstName**, **LastName** and **Email** values.

Request Body:

```
<Attendee> <Credentials> <UserName>Username Goes Here</UserName> <Password>Password Goes Here</Password> </Credentials> <FirstName>Bob</FirstName> <LastName>Barker</LastName> <Address1>200 Clinton Road</Address1> <Address2/> <City>Birmingham</City> <StateAbbreviation>AL</StateAbbreviation> <PostalCode>35244</PostalCode> <Phone>555-333-4567</Phone> <EmailAddress>blah@blah.com</EmailAddress> <AmoundPaid>0</AmoundPaid> <DidAttend>true</DidAttend> </Attendee> 3.14
```

Delete Event Occurrence Registrant

Delete by Internal ID

Request URL:

```
<endpointURL>/DeleteRegistrant?eventOccurrenceId={eventOccurrenceId}&firstName={firstName}&lastName={lastName}&email={emailAddress}
```

Delete by External ID

Request URL:

```
<endpointURL>/DeleteRegistrantByExternalId?externalId={externalId}&firstName={firstName}&lastName={lastName}&email={emailAddress}
```

Request Body:

```
<Credentials>
<UserName>Username Goes Here</UserName>
<Password>Password Goes Here</Password>
</Credentials>
```

CONTENT APPS - API INTEGRATION - LOCATIONS, OVERVIEW
This document provides API Integration information for the **Locations Content App** within CMS.

The API is RESTful and all requests are made up of properly-formatted HTTP requests. Appropriate URLs are defined in each corresponding section of this guide for each **Content App**.

Note:
This document is intended for users who are skilled in consuming Web services and have access to an applicable software application that allows this capability.

Request Method and Content-Type

All requests use the HTTP **POST** method.

Content-Type: For all requests where data is being sent to the system in the request body, the content-type of the request can either be **text/xml** or **application/xml**.

Common Response Codes

The most common response codes are explained in the table below:

HTTP Response Code	Description
200 - OK	The operation was successful.
400 - Bad Request	Client error. The information passed to the service method did not match what the server expected. This could be caused by XML passed to the method that did not match the schema for the method.
403 - Forbidden	Unauthorized. The credentials passed to the service method were incorrect or the account specified did not have the permissions to perform the action that was requested.
500 - Internal Server Error	Server error. The information passed to the service method matched what was expected syntactically, but the server was unable to process the request. This could be due to an invalid identifier passed within the XML to the method, an invalid value passed within the XML to the method, or the information specified an action that violated business rules for the method.

Working with XML in Request/Response Bodies

All data sent to the server and returned from the server will be sent as XML. This section describes several things to keep in mind while working with the request/response XML.

References to **Org Unit** are synonymous with **Location** throughout this document.

Request/Response NULL Fields

Fields in the request/response XML can be set to **Null** in 2 ways:

- **The field has been identified as Null by its "nil" attribute** – When a field contains the attribute **i:nil="true",** then its value will be **Null**. In the example below, **MiddleName** has been defined as a null field while **PictureId** is an empty node. In any response from the server, all null fields will be represented in this way.

```
<OrgUnitId>501</OrgUnitId>
<MiddleName i:nil="true"/>
<PictureId/>
```

See the Namespaces section below, for the namespace needed when using this notation.

- **The field has been omitted from the request** – When a field is not present in the request, then that field value will be **Null**. The example below will be seen by the server exactly the same as method 1 above:
-

```
<OrgUnitId>501</OrgUnitId>
<PictureId/>
```

Namespaces

In most cases, no XML Namespace is required when sending data to the server. The one exception is when using the **i:nil="true"** notation to represent null fields. In this case the following namespace should be included in the root node of the request.

```
xmlns:i=http://www.w3.org/2001/XMLSchema-instance
```

Null Fields vs. Empty Nodes When Updating Data

In order to simplify the process of updating data through the API, null fields and empty nodes are treated differently. It is important to realize these differences and understand how the server will treat these fields in a request.

See Request/Response Null Fields to see how null fields and empty nodes are defined differently.

- **Null Fields** – When a null field is sent to the server during an “Update” request, the server ignores this field.
- **Empty Nodes** – When an empty node is sent to the server, the server removes or deletes that value.

In the example below, **OrgUnitId** will be updated to the value 501, **MiddleName** will be ignored (i.e. its previously existing value will not be altered), and **PictureId** will be deleted from the entity.

```
<OrgUnitId>501</OrgUnitId>
<MiddleName i:nil="true"/>
<PictureId/>
```

AUTHENTICATION

CMS now requires token-based authentication to utilize the API. Authentication is achieved by passing an Authorization Header Value, using the Authenticate method and retrieving the token that will be used in all subsequent API methods within a given time frame.

Several steps are involved in creating the Authorization Header Value.

- Work with Healthgradesth to receive an API user and password.
- Format a string in the following format: <Content Apps User>:<Content Apps Password> (example: APIUser:MyP@ssWord)
- Convert the string to binary.
- Base64 encode the string.
- Prepend the Base64 string with the text: "Basic ".

```
Example authentication code:  Basic ZnVsY3J1bWFkncbOkVBMV9xYWI=
```

To authenticate, create a request with the following URL (where Instance Name is the name of your instance) with a POST request type:
https://contentapps.influencehealth.com/<instance name>/api/public/v1/authenticate

Pass a header in the following format:

```
Authorization:<Authorization Header Value>
```

Example Header:

```
Authorization:Basic ZnVsY3J1bWFkncbOkVBMV9xYWI=
```

The response will include a token in JSON format that you will use to access the API for all subsequent methods:


```
{
"Token" : "221b2aad-ad56-4cd6-934d-233eb4970faf"
}
```


For each API request, include the token as a header in the following format:

```
AuthorizationToken:<token>
```

Example Header:

```
AuthorizationToken:221b2aad-ad56-4cd6-934d-233eb4970faf
```

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LOCATIONS

For all Locations API requests, the base service endpoint URL is shown below:

```
https://contentapps.influencehealth.com/<instance name>/api/admin/v1/api/location
```

In the example above, <instance name> should be replaced with the instance name associated with the target instance.

Get All Locations Request

Request

Request URL:

```
<endpoint URL>/locations
```

Request Body: None

Paging (Optional)

Paging can be achieved by appending the pageNumber and pageSize parameters to the query string:
<endpoint URL>/locations?pageNumber=3&pageSize=10

Response

The response XML will return an array of **OrgUnitSearchResultDto** nodes. Each node represents an organizational unit in the system:


```
<ArrayOfOrgUnitSearchResultDto

xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.OrgUnits.Common
"
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <OrgUnitSearchResultDto>
        <Address1>849 South Three Notch Street</Address1>
        <Address2/>
        <City>Andalusia</City>
        <CompleteAddress>849 South Three Notch Street Andalusia, Alabama
36420</CompleteAddress>
        <Custom1 i:nil="true"/>
        <Custom2 i:nil="true"/>
        <Custom3 i:nil="true"/>
        <CustomKeywords i:nil="true"/>
        <Description i:nil="true"/>
        <DirectUrl/>
        <DistanceUnit i:nil="true"/>
        <Fax>2059822345</Fax>
```

```
        <Id>501</Id>
        <IsSite>false</IsSite>
        <Keywords i:nil="true"/>
        <Name>Andalusia Regional Hospital</Name>
        <OrgUnitDistance i:nil="true"/>
        <OrgUnitExternalId i:nil="true"/>
        <ParentId>2</ParentId>
        <Path i:nil="true"/>
        <Phone>3342228466</Phone>
        <PictureId i:nil="true"/>
        <PictureUrl i:nil="true"/>
        <PostalCode>36420</PostalCode>
        <StateName>Alabama</StateName>
    </OrgUnitSearchResultDto>
    <OrgUnitSearchResultDto>
<...>
    </OrgUnitSearchResultDto>
    <OrgUnitSearchResultDto>
<...>
    </OrgUnitSearchResultDto>
</ArrayOfOrgUnitSearchResultDto>
```

Get Specific Location Request

Request by Internal Id

Request URL:

```
<endpoint URL>/locations?id=<Id>
```

In the example above, <Id> should be replaced with the Location Id.

Request Body: None

Request by External Id

Request URL:

```
<endpoint URL>/locations?externalId=<externalId>
```

In the example above, <externalId> should be replaced with the Location External Id.

Request Body: None

Response

The response XML will return a single OrgUnit node.

```
<OrgUnit
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <OrgUnitExternalId i:nil="true"/>
    <Name>Andalusia Regional Hospital</Name>
    <IsEnabled>true</IsEnabled>
    <Address1>849 South Three Notch Street</Address1>
    <Address2/>
    <City>Andalusia</City>
    <State>Alabama</State>
    <PostalCode i:nil="true"/>
    <Country>United States</Country>
    <Latitude>31.297980844974500</Latitude>
    <Longitude>-86.494771912694000</Longitude>
    <Phone>3342228466</Phone>
    <Fax>2059822345</Fax>
    <Email i:nil="true"/>
    <CustomUrl/>
    <Description i:nil="true"/>
    <ImageUrl i:nil="true"/>
    <PictureId i:nil="true"/>
    <OrgUnitTypes>
        <OrgUnitType>
            <Name>Departments</Name>
            <IsPrimaryOrgUnitType>false</IsPrimaryOrgUnitType>
        </OrgUnitType>
        <OrgUnitType>
            <Name>Locations</Name>
            <IsPrimaryOrgUnitType>true</IsPrimaryOrgUnitType>
        </OrgUnitType>
    </OrgUnitTypes>
    <OrgUnitInsurances>
        <OrgUnitInsurance>
            <Name>American Family Insurance</Name>
        </OrgUnitInsurance>
        <OrgUnitInsurance>
            <Name>Aetna</Name>
        </OrgUnitInsurance>
        <OrgUnitInsurance>
            <Name>Aflac</Name>
        </OrgUnitInsurance>
    </OrgUnitInsurances>
    <OrgUnitServices>
```

```xml
        <OrgUnitService>
            <Name>Cosmetic Services</Name>
        </OrgUnitService>
        <OrgUnitService>
            <Name>DNA Testing</Name>
        </OrgUnitService>
    </OrgUnitServices>
    <OrgUnitHours>
        <WeekDayHours>
            <DayOfWeek>Tuesday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Wednesday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Thursday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Friday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Saturday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
    </OrgUnitHours>
    <OrgUnitDiscountCodes/>
    <ParentInternalId>2</ParentInternalId>
    <ParentExternalId i:nil="true"/>
    <CopiedInternalId i:nil="true"/>
    <CopiedExternalId i:nil="true"/>
    <CostCenter i:nil="true"/>
    <Keywords i:nil="true"/>
    <CustomKeywords i:nil="true"/>
    <Custom1 i:nil="true"/>
```

```
    <Custom2 i:nil="true"/>
    <Custom3 i:nil="true"/>
    <OrgUnitInternalId>501</OrgUnitInternalId>
</OrgUnit>
```

The response returned by this request is presented in the same format as the request body for the Add Location request (except for the OrgUnitInternalId node) as well as the Update Location request.

Add Location Request

Request

Request URL:

```
<endpoint URL>/addlocation
```

Request Body:

The request body is in the same format as the response from the Get Specific Location Request, except for OrgUnitInternalId . The Credentials section can be ignored.

The OrgUnitInternalId will be generated when the location is added, and therefore cannot be specified when adding a location.

An OrgUnitExternalId may be specified in order to keep records in sync with an external system. Locations can later be queried through this API via the OrgUnitExternalId.

```
<OrgUnit
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <Credentials>
        <UserName></UserName>
        <Password></Password>
    </Credentials>
    <OrgUnitExternalId i:nil="true"/>
    <Name>My Test Hospital</Name>
    <IsEnabled>true</IsEnabled>
    <Address1>849 South Three Notch Street</Address1>
    <Address2/>
    <City>Andalusia</City>
    <State>Alabama</State>
    <PostalCode i:nil="true"/>
    <Country>United States</Country>
    <Latitude>31.297980844974500</Latitude>
    <Longitude>-86.494771912694000</Longitude>
    <Phone>3342228466</Phone>
    <Fax>2059822345</Fax>
    <Email i:nil="true"/>
```

```
<CustomUrl/>
<Description i:nil="true"/>
<ImageUrl i:nil="true"/>
<PictureId i:nil="true"/>
<OrgUnitTypes>
    <OrgUnitType>
        <Name>Departments</Name>
        <IsPrimaryOrgUnitType>false</IsPrimaryOrgUnitType>
    </OrgUnitType>
    <OrgUnitType>
        <Name>Locations</Name>
        <IsPrimaryOrgUnitType>true</IsPrimaryOrgUnitType>
    </OrgUnitType>
</OrgUnitTypes>
<OrgUnitInsurances>
    <OrgUnitInsurance>
        <Name>American Family Insurance</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Aetna</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Aflac</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Allstate</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>American Fidelity Insurance</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>American National Insurance Company</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Amerigroup</Name>
    </OrgUnitInsurance>
</OrgUnitInsurances>
<OrgUnitServices>
    <OrgUnitService>
        <Name>Cosmetic Services</Name>
    </OrgUnitService>
    <OrgUnitService>
        <Name>DNA Testing</Name>
```

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```
        </OrgUnitService>
    </OrgUnitServices>
    <OrgUnitHours>
        <WeekDayHours>
            <DayOfWeek>Tuesday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Wednesday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Thursday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Friday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Saturday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
    </OrgUnitHours>
    <OrgUnitDiscountCodes/>
    <ParentInternalId>2</ParentInternalId>
    <ParentExternalId i:nil="true"/>
    <CopiedInternalId i:nil="true"/>
    <CopiedExternalId i:nil="true"/>
    <CostCenter i:nil="true"/>
    <Keywords>cosmetic services,departments,dna testing,locations</Keywords>
    <CustomKeywords i:nil="true"/>
    <Custom1 i:nil="true"/>
    <Custom2 i:nil="true"/>
    <Custom3 i:nil="true"/>
</OrgUnit>
```

Required Fields

The following fields are required when adding a location:

- Name

Update Location Request

Request

Request URL:

```
<endpoint URL>/updatelocation
```

Request Body:

The request body is in the same format as the response from the Get Specific Location Request. The Credentials section can be ignored.

```
<OrgUnit
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <Credentials>
        <UserName></UserName>
        <Password></Password>
    </Credentials>
    <OrgUnitExternalId i:nil="true"/>
    <Name>My Test Hospital</Name>
    <IsEnabled>true</IsEnabled>
    <Address1>849 South Three Notch Street</Address1>
    <Address2/>
    <City>Andalusia</City>
    <State>Alabama</State>
    <PostalCode i:nil="true"/>
    <Country>United States</Country>
    <Latitude>31.297980844974500</Latitude>
    <Longitude>-86.494771912694000</Longitude>
    <Phone>3342228466</Phone>
    <Fax>2059822345</Fax>
    <Email i:nil="true"/>
    <CustomUrl/>
    <Description i:nil="true"/>
    <ImageUrl i:nil="true"/>
    <PictureId i:nil="true"/>
    <OrgUnitTypes>
        <OrgUnitType>
            <Name>Departments</Name>
            <IsPrimaryOrgUnitType>false</IsPrimaryOrgUnitType>
        </OrgUnitType>
```

```
    <OrgUnitType>
        <Name>Locations</Name>
        <IsPrimaryOrgUnitType>true</IsPrimaryOrgUnitType>
    </OrgUnitType>
</OrgUnitTypes>
<OrgUnitInsurances>
    <OrgUnitInsurance>
        <Name>American Family Insurance</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Aetna</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Aflac</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Allstate</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>American Fidelity Insurance</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>American National Insurance Company</Name>
    </OrgUnitInsurance>
    <OrgUnitInsurance>
        <Name>Amerigroup</Name>
    </OrgUnitInsurance>
</OrgUnitInsurances>
<OrgUnitServices>
    <OrgUnitService>
        <Name>Cosmetic Services</Name>
    </OrgUnitService>
    <OrgUnitService>
        <Name>DNA Testing</Name>
    </OrgUnitService>
</OrgUnitServices>
<OrgUnitHours>
    <WeekDayHours>
        <DayOfWeek>Tuesday</DayOfWeek>
        <OpenTime>8:00 AM</OpenTime>
        <CloseTime>5:00 PM</CloseTime>
    </WeekDayHours>
    <WeekDayHours>
```

```
            <DayOfWeek>Wednesday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Thursday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Friday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
        <WeekDayHours>
            <DayOfWeek>Saturday</DayOfWeek>
            <OpenTime>8:00 AM</OpenTime>
            <CloseTime>5:00 PM</CloseTime>
        </WeekDayHours>
    </OrgUnitHours>
    <OrgUnitDiscountCodes/>
    <ParentInternalId>2</ParentInternalId>
    <ParentExternalId i:nil="true"/>
    <CopiedInternalId i:nil="true"/>
    <CopiedExternalId i:nil="true"/>
    <CostCenter i:nil="true"/>
    <Keywords>cosmetic services,departments,dna testing,locations</Keywords>
    <CustomKeywords i:nil="true"/>
    <Custom1 i:nil="true"/>
    <Custom2 i:nil="true"/>
    <Custom3 i:nil="true"/>
    <OrgUnitInternalId>501</OrgUnitInternalId>
</OrgUnit>
```

Get All Location Types Request

Request

Request URL:

```
<endpoint URL>/types
```

Request Body: None

Response

The response XML will return an array of OrgUnitTypeDto nodes. Each node represents an organizational unit type in the system.


```xml
<ArrayOfOrgUnitTypeDto

xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.OrgUnits.Common
"
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <OrgUnitTypeDto>
        <Id>5</Id>
        <ImageUrl i:nil="true"/>
        <IsEnabled>true</IsEnabled>
        <IsOutsideOfOrganization>false</IsOutsideOfOrganization>
        <Name>Departments</Name>
        <SiteIndicator>false</SiteIndicator>
    </OrgUnitTypeDto>
    <OrgUnitTypeDto>
        <Id>2</Id>
        <ImageUrl i:nil="true"/>
        <IsEnabled>true</IsEnabled>
        <IsOutsideOfOrganization>false</IsOutsideOfOrganization>
        <Name>Locations</Name>
        <SiteIndicator>false</SiteIndicator>
    </OrgUnitTypeDto>
    <OrgUnitTypeDto>
        <Id>3</Id>
        <ImageUrl i:nil="true"/>
        <IsEnabled>true</IsEnabled>
        <IsOutsideOfOrganization>false</IsOutsideOfOrganization>
        <Name>Regions</Name>
        <SiteIndicator>false</SiteIndicator>
    </OrgUnitTypeDto>
</ArrayOfOrgUnitTypeDto>
```


Get Location Type by Id Request

Request

Request URL:

```
<Endpoint URL>/types?id={Id}
```

In the example above, Id is the location type id.

Request Body: None

Response

The response XML will return a single OrgUnitTypeDto node with the Id specified.

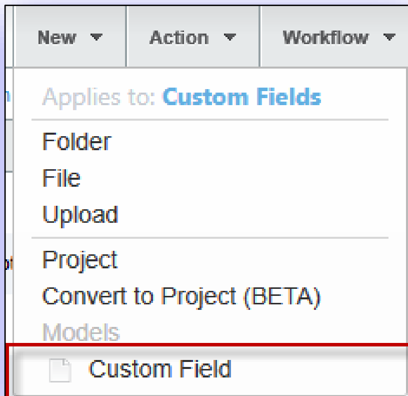

```
<OrgUnitTypeDto

xmlns="http://schemas.datacontract.org/2004/07/MEDSEEK.eHealth.Apps.OrgUnits.Common
"
    xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <Id>1</Id>
    <ImageUrl i:nil="true"/>
    <IsEnabled>true</IsEnabled>
    <IsOutsideOfOrganization>false</IsOutsideOfOrganization>
    <Name>Site</Name>
    <SiteIndicator>true</SiteIndicator>
</OrgUnitTypeDto>
```

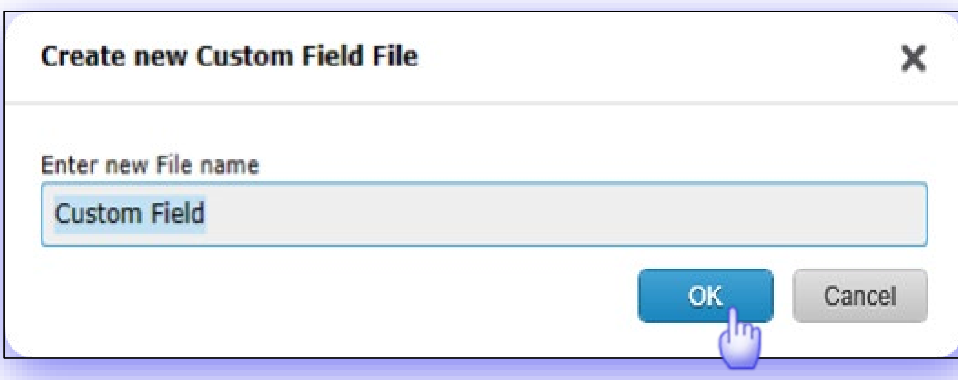
CUSTOM CONTENT - BASIC CONFIGURATION, CREATING CUSTOM FIELDS

Custom Fields are created at the site root level and can be used across the entire site.

- From the **Site Root** folder, open the **_Configuration** folder:
- Open the **_Custom Content** folder.
- Open the **Custom Fields** folder.
- Click **New** from the top menu and select **Custom Field**.

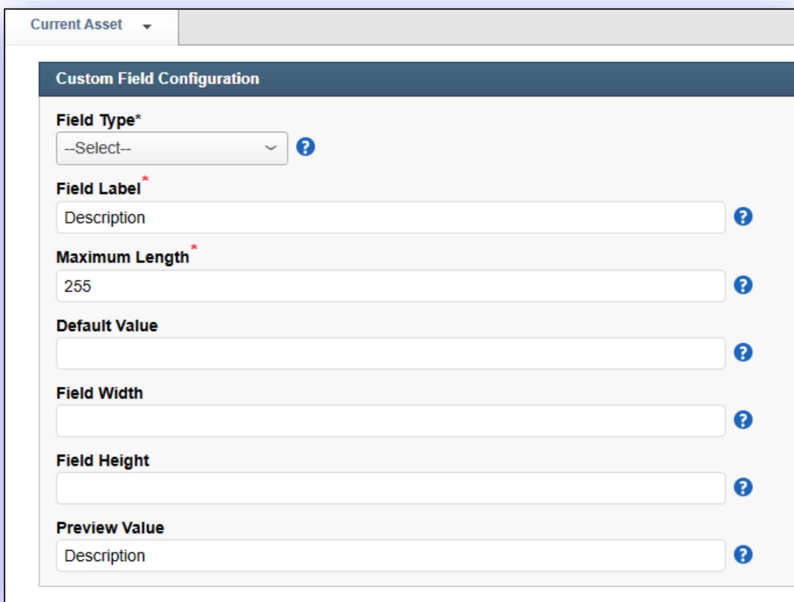


- Name the new field and click **OK**.



To Complete Custom Field Configuration:

- Select the **Field Type** (This is currently either *Text* or *WYSIWYG*.)
- Enter a **Field Label** (This value defaults to [*Field Name*].)
- Enter **Maximum Length** (This is the length of the field. It defaults to 255 characters.)
- Provide a **Default Value** if desired (This value will display as the default on the **Admin Input Form**.)
- Provide **Field Width**, if desired.
- Provide **Field Height**, if desired.
- Provide **Preview Value**, if desired. (This value will display on the layout preview. It defaults to [*Field Name*].)
- Click **Save** or **Save & Preview**. (You can verify that the new custom field has now been added within the **Custom Fields** folder.)

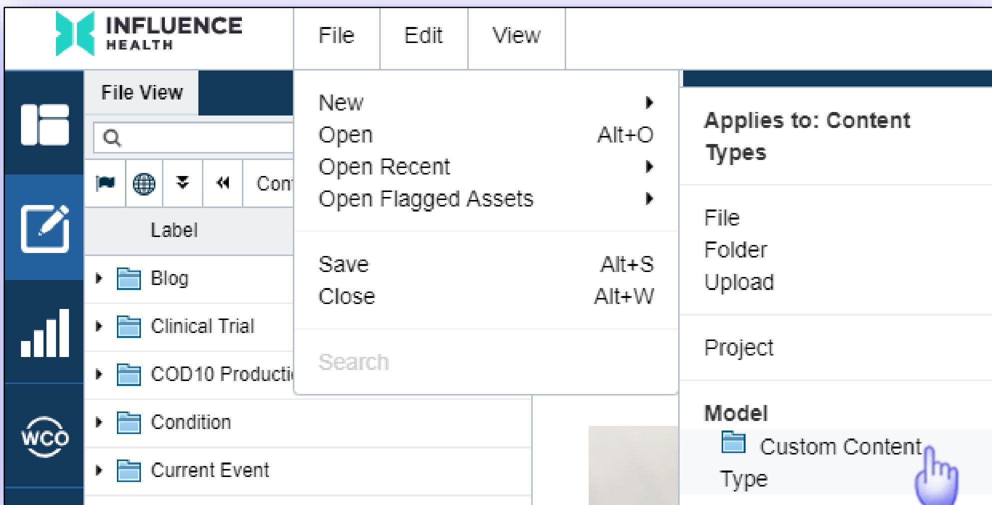


Custom Fields have no viewable output, so a preview is not available for them.

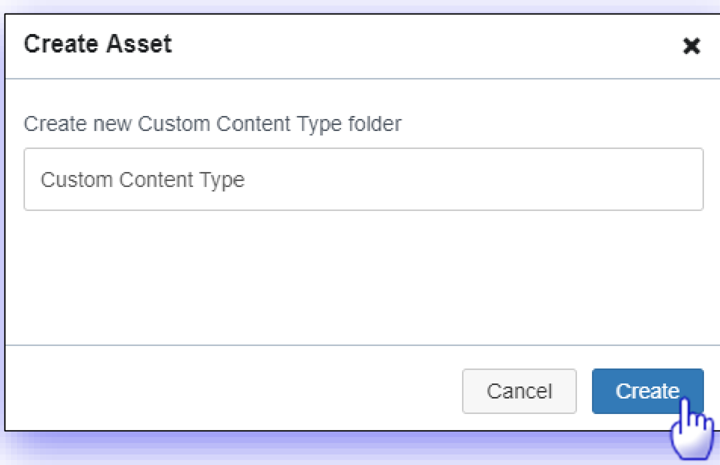
CREATING CUSTOM CONTENT TYPES AND LAYOUTS

Custom Types are created at the site root level and can be used across the entire site.

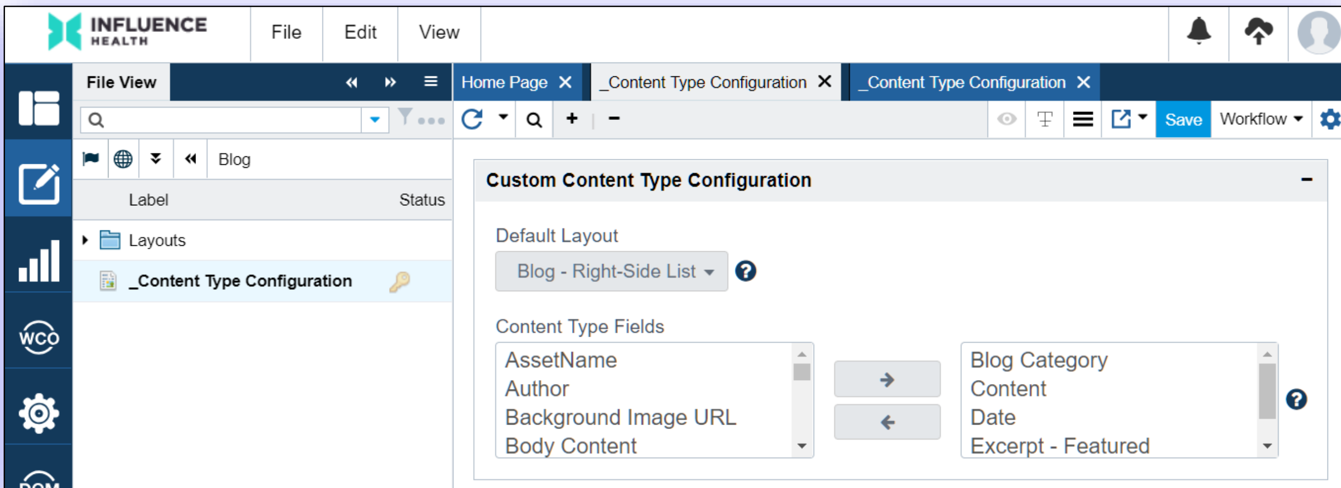
- From the **Site Root** folder, open the **_Configuration** folder.
- Open the **_Custom Content** folder.
- Double-click the **Content Types** folder.
- Click **File** > **New** from the top menu and select **Custom Content Type**. (Your path would look something like this: .. /Reference Sites/Sample/Site Root/_Configuration/_Custom Content/Content Types



-
- Name the new **Custom Content Type** and click **Create**.



- A new folder is created, with the name you entered in the step above for the new **Custom Content Type**, which contains a **_Content Type Configuration** file and a **Layouts** folder.
- The **_Content Type Configuration** form view has a dropdown option which allows you to set the **Default Layout** for the content type.
- The **_Content Type Configuration** form view also has a side-by-side multi-select box which allows you to select which **Content Type Fields** will be available as tokens when building a page of this custom content type.

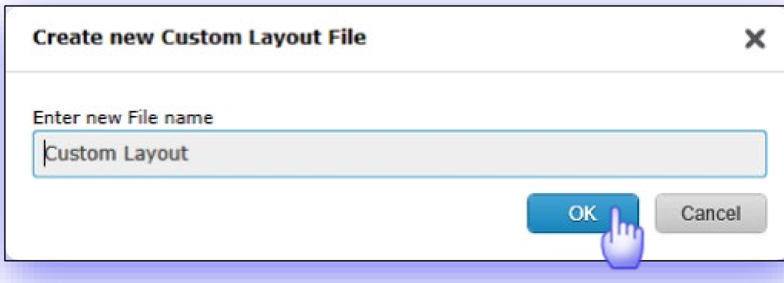


Custom Content Type Configurations have no viewable output, therefore nothing will appear in Preview mode.

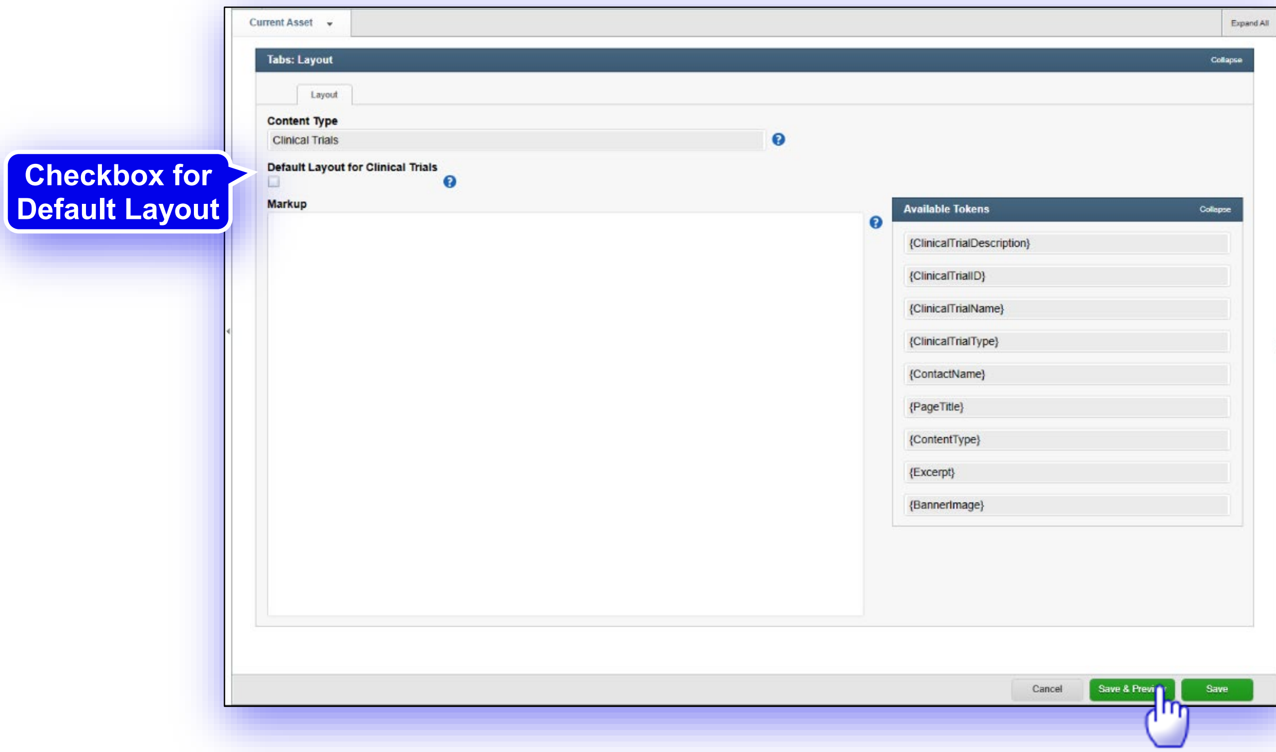
Important:
The Default Layout option has no correlation to the Content Type Field selection.

- The **Layouts** folder contains a **Default Layout**, or "out-of-the-box", basic layout.

- A **Custom Layout** can be created by clicking **New** from the top menu and selecting *Custom Layout*.
- Name the new **Custom Layout** and click **OK**. A new layout file is created for the content type. You will notice that the **Content Type** is pre-populated.



- Check the **Default Layout for [***Content Type***]** box to use this new layout for the content type.
- The **Markup** area is used to drop any HTML markup you want to use for the layout.
- **Available Tokens** pull in data for custom fields, as well as for standard available fields. Highlight a token using your pointer, then copy/paste the token into the **Markup** area, as needed.



Checkbox for Default Layout
Current Asset
Expand All
Tabs: Layout
Collapse
Layout
Content Type
Clinical Trials
Default Layout for Clinical Trials
Markup
Available Tokens
Collapse
{ClinicalTrialDescription}
{ClinicalTrialID}
{ClinicalTrialName}
{ClinicalTrialType}
{ContactName}
{PageTitle}
{ContentType}
{Excerpt}
{BannerImage}
Cancel
Save

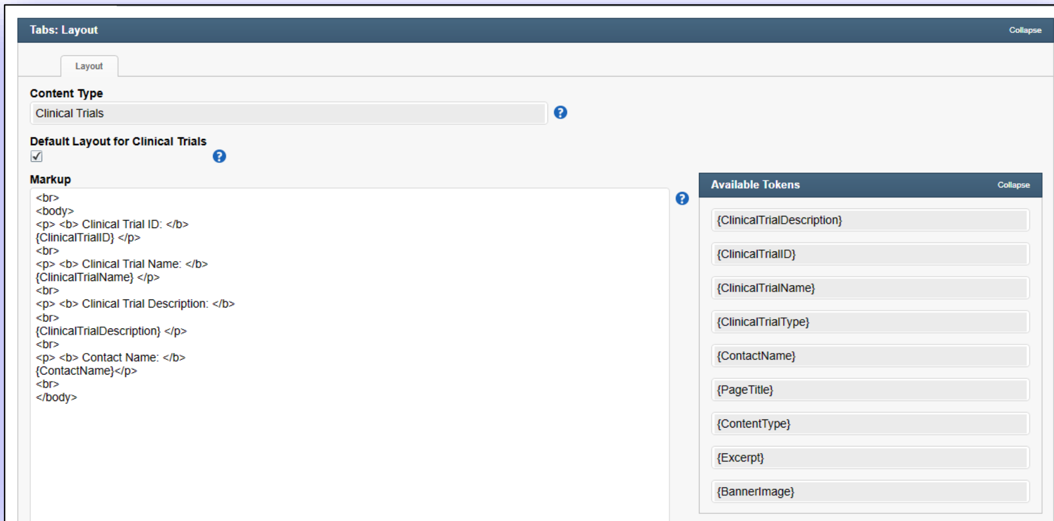
BASIC EXAMPLE OF HTML MARKUP WITH TOKENS:

Following, is a basic example of HTML markup with tokens:

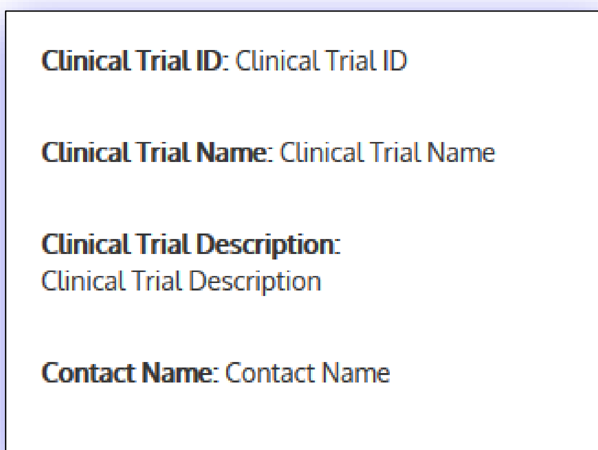
```
<p> <b> Clinical Trial ID: </b>
{ClinicalTrialID} </p>
<br>
<p> <b> Clinical Trial Name: </b>
{ClinicalTrialName} </p>
<br>
<p> <b> Clinical Trial Description: </b>
<br>
{ClinicalTrialDescription} </p>
<br>
<p> <b> Contact Name: </b>
{ContactName}</p>
```

Tabs Layout

- Click **Save** or **Save & Preview**. The preview renders[8] the layout of the HTML markup with token placeholder descriptions.



- Result on publish:

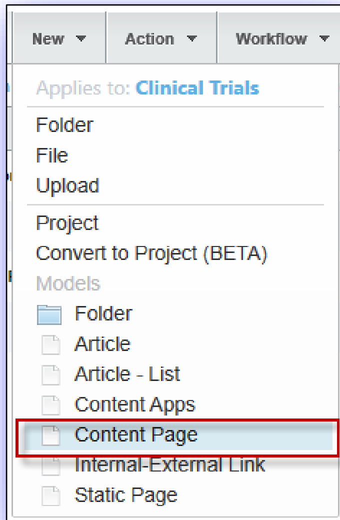


CREATING CUSTOM CONTENT PAGES

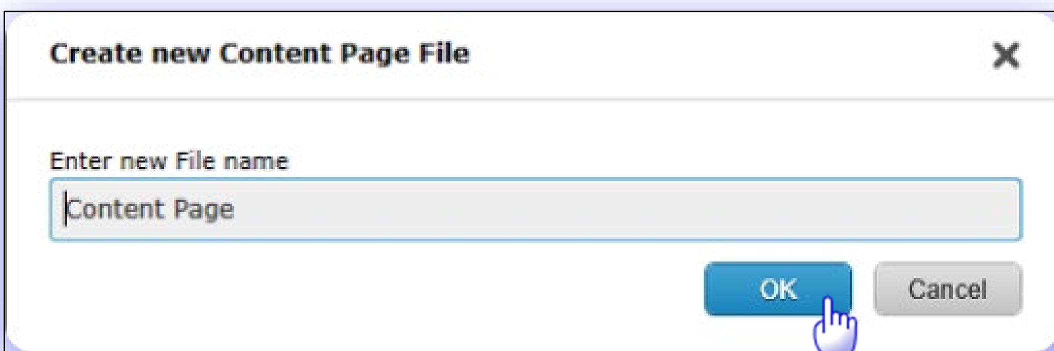
[8] In software, rendering is the process of generating an image from a model by means of computer software.

Custom Content Pages can be built to render the custom fields and layouts as configured.

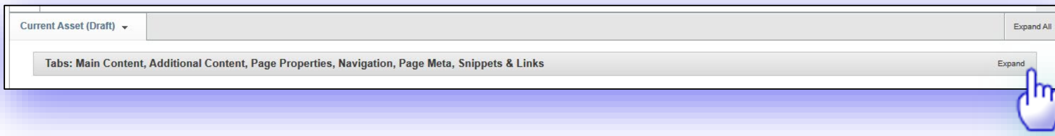
- From the **_Pages** folder (or from a folder within the **_Pages** folder), click **New** from the top menu and select **Content Page**.



- Enter the new content page file name and click **OK**.



- A new **Content Page** is created, with the name you entered in the step above.
- Expand the Tabs: Main Content, Additional Content, Page Properties… accordion.

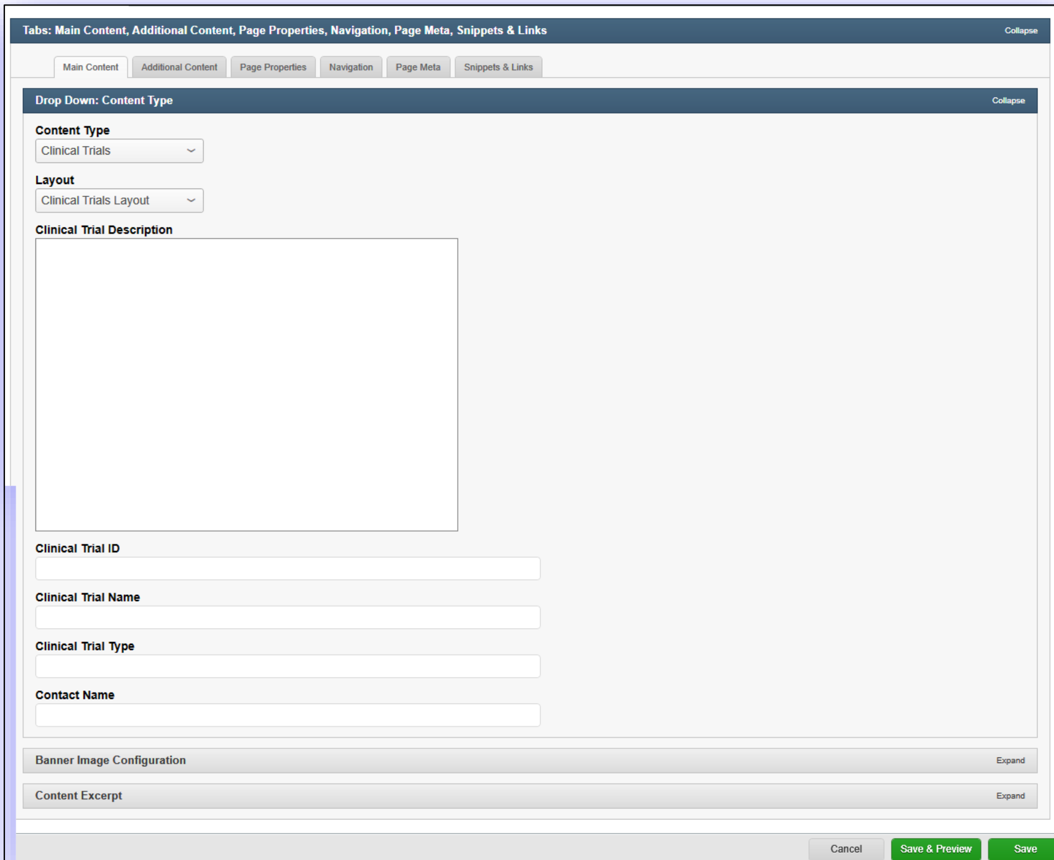


- Select the **Drop Down: Content Type** option.

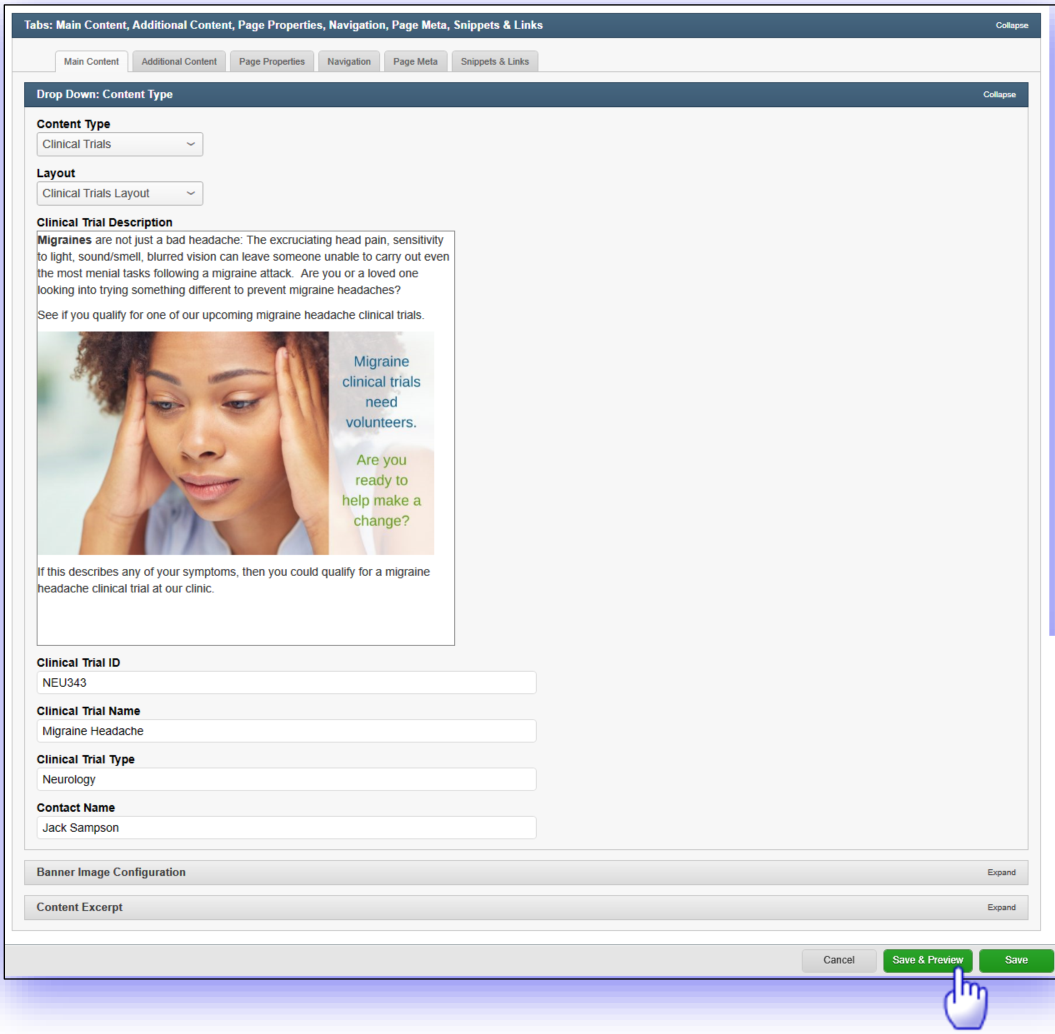
- Choose a **Content Type** from the drop-down menu.

Tabs: Main Content, Additional Content, Page Properties, Navigation, Page Meta, Snippets and Links

You will notice that all the custom fields that were added for the **Content Type** are now available for selection.



- Enter all appropriate information in the fields provided.
- Click **Save & Preview** to see the preview.



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Preview Page

MIGRAINE HEADACHE

Clinical Trial ID: NEU343

Clinical Trial Name: Migraine Headache

Clinical Trial Description:

Migraines are not just a bad headache: The excruciating head pain, sensitivity to light, sound/smell, blurred vision can leave someone unable to carry out even the most menial tasks following a migraine attack. Are you or a loved one looking into trying something different to prevent migraine headaches?

See if you qualify for one of our upcoming migraine headache clinical trials.

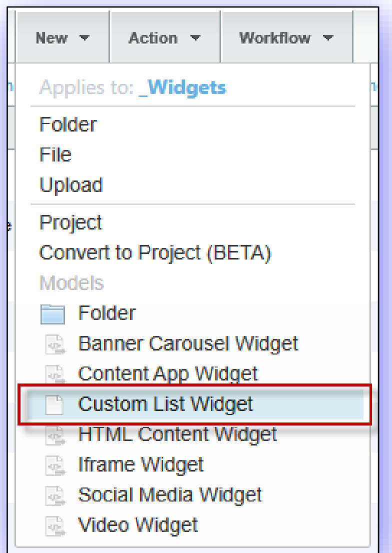
If this describes any of your symptoms, then you could qualify for a migraine headache clinical trial at our clinic.

Contact Name: Jack Sampson

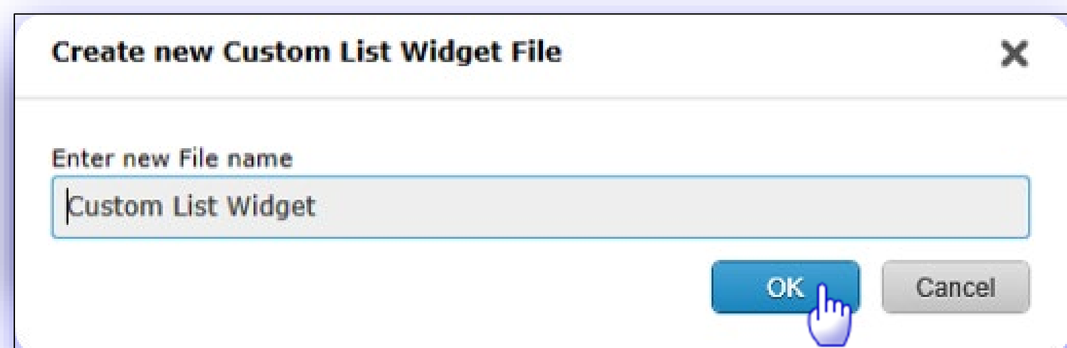
CREATING CUSTOM LIST WIDGETS

Custom List Widgets can be built to render the custom fields within a list widget for a static page.

- From the **Site Root** folder, go into the **_Widgets** folder.

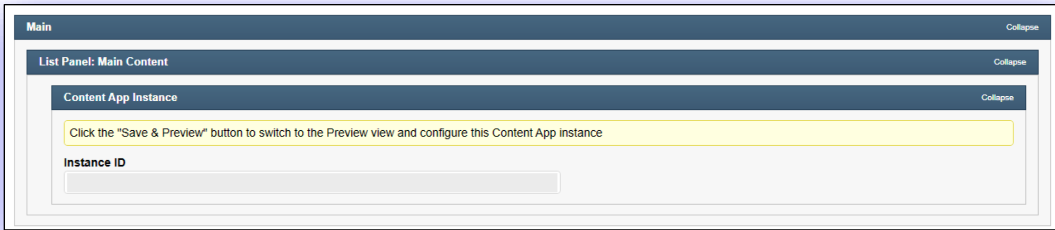


- Click **New** from the top menu and select **Custom List Widget**.
- Name the new **Custom List Widget** and click **OK**. The new widget is created.

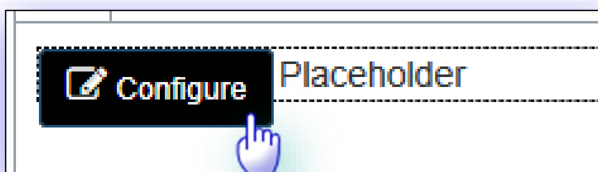


- Expand the **Content App** instance.

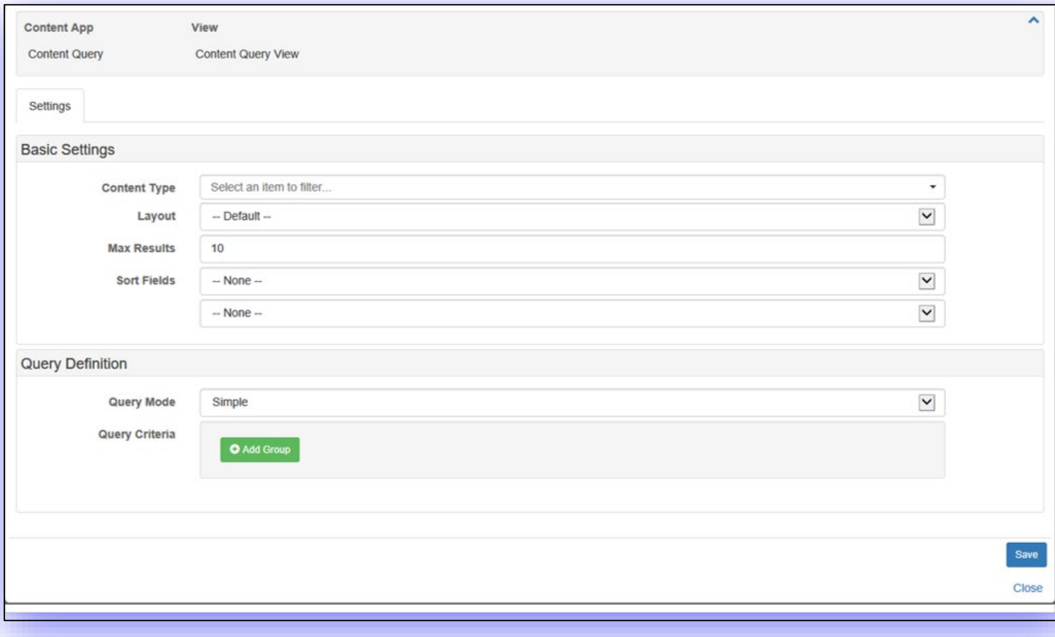
- Initially, there is no **Instance ID**, so click **Save & Preview** to view and configure the **Content App** instance.



From the **Preview**, hover over the **Content Query Placeholder** text and click the **Configure** button when it appears.

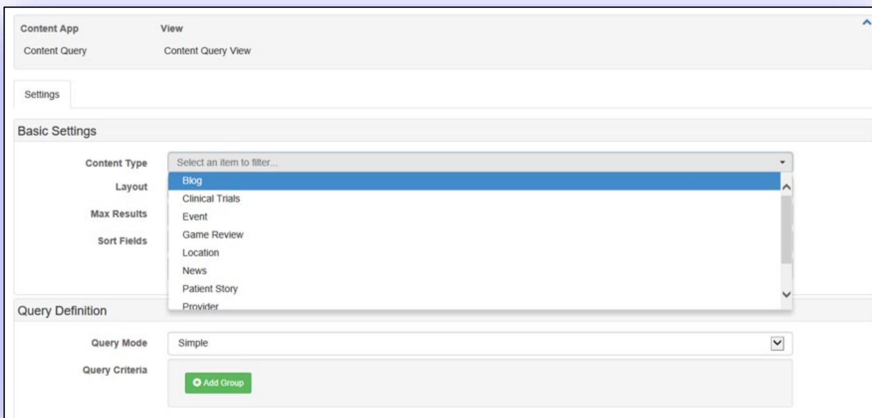


The **Content Query Content App Configuration** page displays.



From the **Basic Settings** section, the following options can be configured:

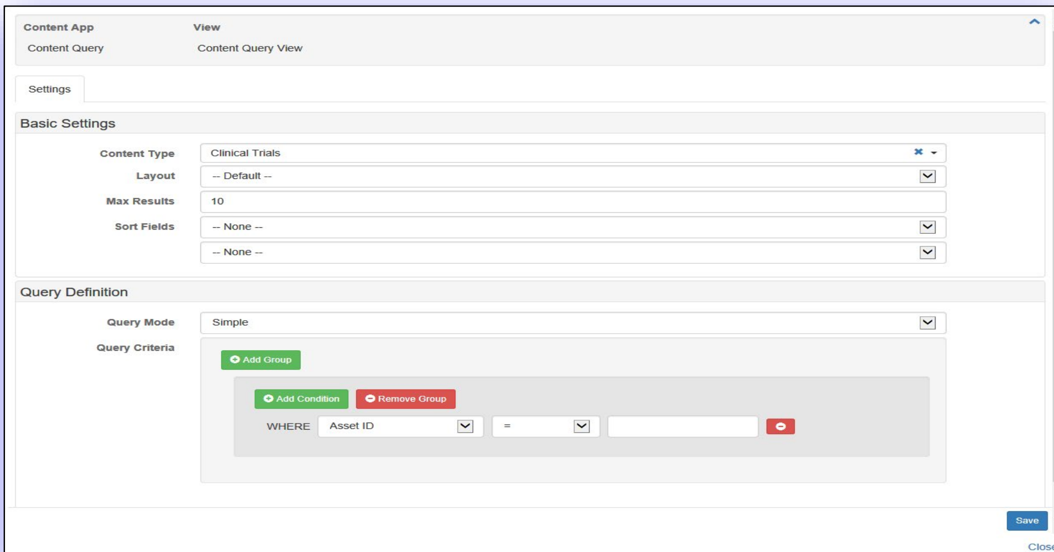
- Content Type
- **Layout** (Currently, the only option is *Default*. The next release should include additional layouts.)
- Maximum # of Results
- Sort Fields



From the **Query Definition** section, the following options can be configured:

- **Query Mode** (*Simple* or *Advanced*)
- Query Criteria
-

Drop the widget on a page to see the list results. Don't forget to publish the widget!



Note:
G2 must be set up in order for the Custom List Widget to query the results.

CUSTOM LIST QUERY CONFIGURATION

Hospital Administrator users can now dynamically display related providers and services on the **Locations Detail** page.

Configuration for this display is available within **Custom Lists**, where users can reference these **Page Meta Tag** values:

- Location IDs,
- Provider IDs and
- Event IDs,

as well as the *Query String Param* value, in the **Query Criteria** area of the **Query Definition** panel.

Custom Lists display the correct list results based on the **Meta Tag** values on a page.

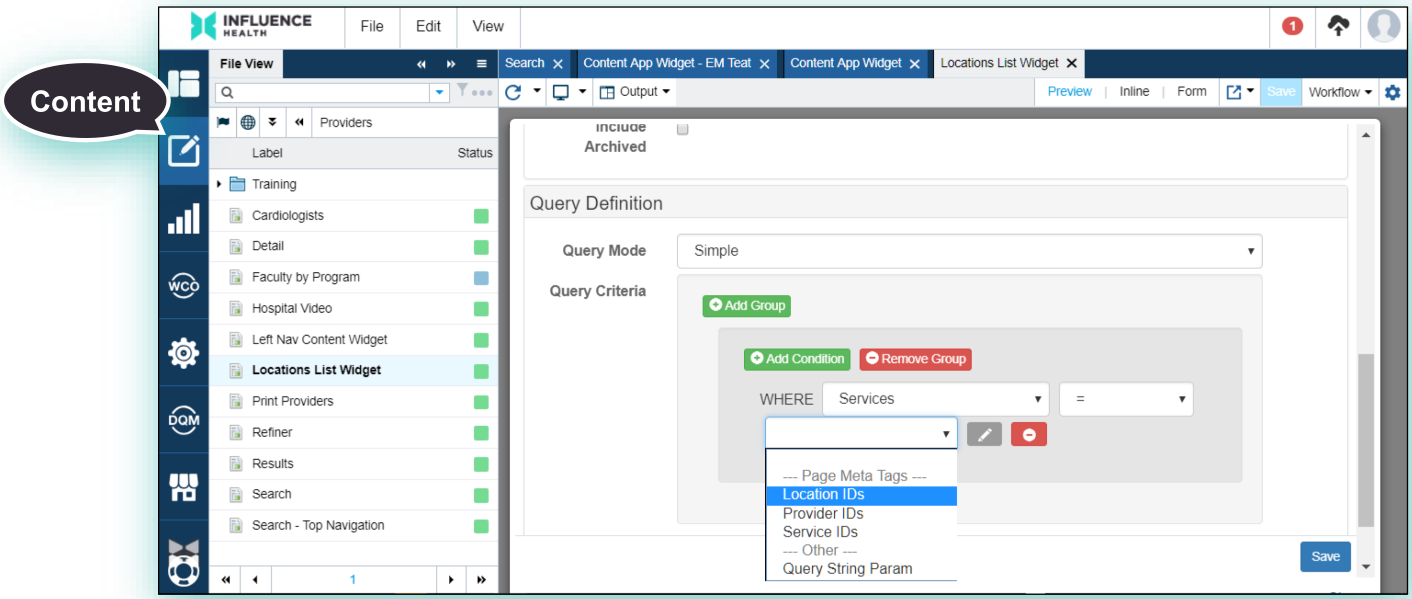
Example: Accessing Locations List Widget Content Query Definition within Providers

From the **Content** icon, access the **Locations List Widget** within **Providers** (sample path**:** ../Site Root/_Widgets/Providers).

From the **File View** panel, double-click the **Locations List Widget** asset. When the page displays, hover over the **Content Query Placeholder.** Click the **Configure** button that displays.

Scroll down to view the **Query Definition** panel. There are two fields:

- **Query Mode** (This drop-down menu has two options: *Advanced* (default) and *Simple.* For our example, we chose *Simple*.)
- **Query Criteria** (This area populates with contextual button, drag and drop and drop-down controls, based on your **Query Mode** selection, with which to define your query criteria. We clicked **Add Group** and in the **WHERE** drop-down, selected *Services*. (Operators are: *=, !=, <, <=, >, >=, Contains, Contains, Not Contains, Starts With, Ends With, In, Not In)* and selected *Location IDs.*
- **Page Meta Tags** drop-down menu.


Content
INFLUENCE HEALTH
File
Edit
View
File View
Providers
Label
Status
Training
Cardiologists
Detail
Faculty by Program
Hospital Video
Left Nav Content Widget
Locations List Widget
Print Providers
Refiner
Results
Search
Search - Top Navigation
Search
Content App Widget - EM Teat
Content App Widget
Locations List Widget
Output
Preview
Inline
Form
Save
Workflow
Include Archived
Query Definition
Query Mode
Simple
Query Criteria
Add Group
Add Condition
Remove Group
WHERE
Services
=
--- Page Meta Tags ---
Location IDs
Provider IDs
Service IDs
--- Other ---
Query String Param
Save

G2 SEARCH
All custom content fields and types are indexed by G2[9], therefore the **Site Search** and **Custom List Widget** return results for the custom content.

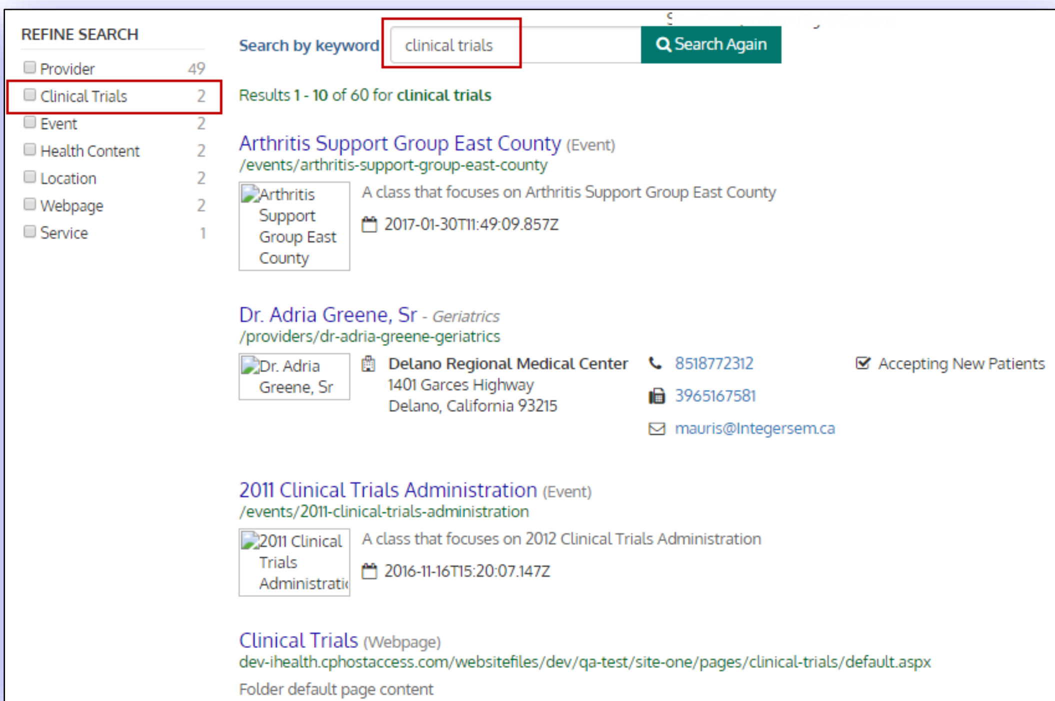
Site Search refiners also display and filter search results by **Content Type**.

Content App-Specific Search G2 Index Additions

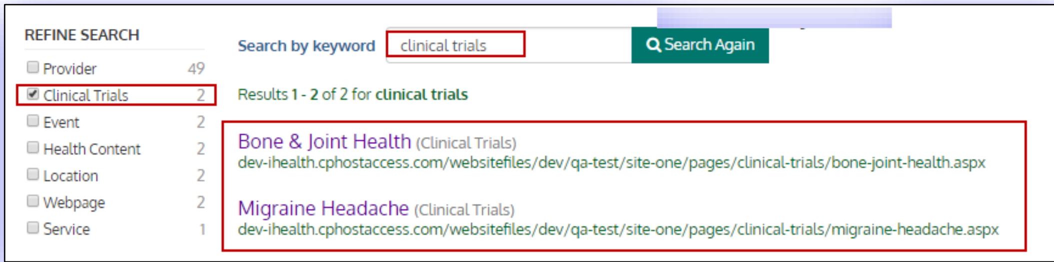
All available **Content App** fields are now in o the **Search G2** Index. This includes all **Providers**, **Events** and **Locations** fields that are not currently indexed. For example, **Phone Numbers** for **Locations** is now indexed in **Search G2**, thus will now display in **Site Search** and **Content Query** search results.

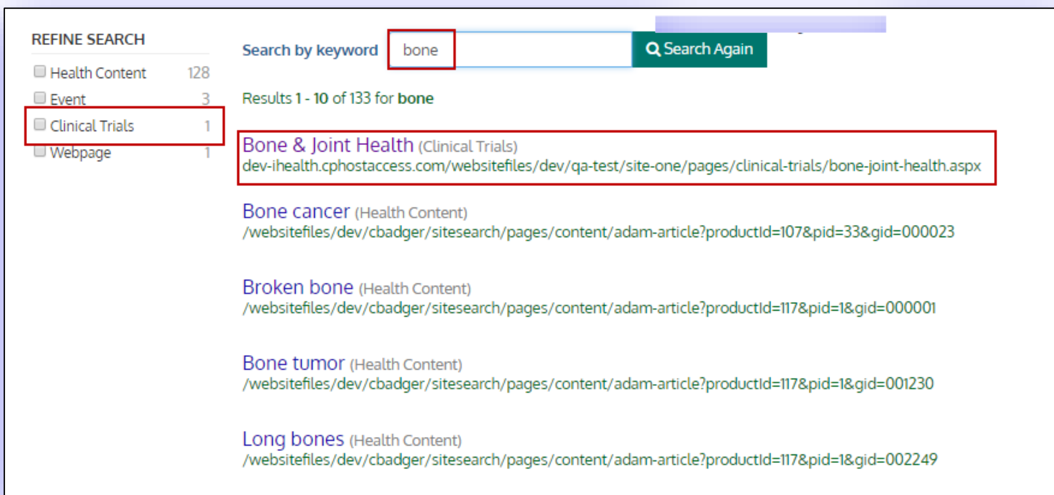
Additional fields have also been added.

Site Search Examples

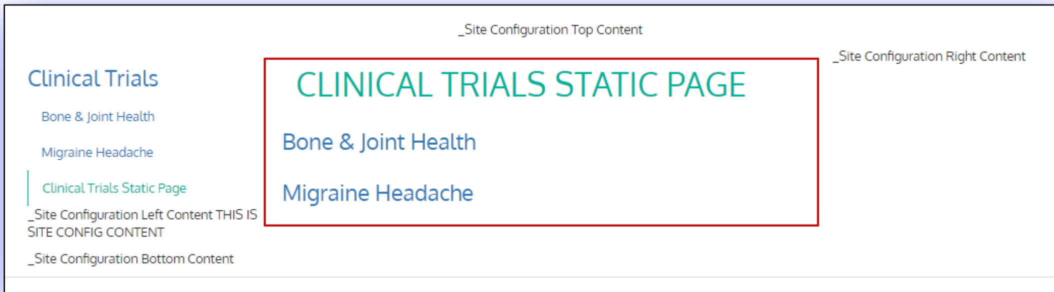


[9] Search G2 is Crownpeak's industry standard indexing and cloud-based query platform, built for speed, fault tolerance and scalability.


REFINE SEARCH
Provider 49
Clinical Trials 2
Event 2
Health Content 2
Location 2
Webpage 2
Service 1
Search by keyword
clinical trials
Search Again
Results 1 - 2 of 2 for clinical trials
Bone & Joint Health (Clinical Trials)
dev-ihealth.cphostaccess.com/websitefiles/dev/qa-test/site-one/pages/clinical-trials/bone-joint-health.aspx
Migraine Headache (Clinical Trials)
dev-ihealth.cphostaccess.com/websitefiles/dev/qa-test/site-one/pages/clinical-trials/migraine-headache.aspx


REFINE SEARCH
Health Content 128
Event 3
Clinical Trials 1
Webpage 1
Search by keyword
bone
Search Again
Results 1 - 10 of 133 for bone
Bone & Joint Health (Clinical Trials)
dev-ihealth.cphostaccess.com/websitefiles/dev/qa-test/site-one/pages/clinical-trials/bone-joint-health.aspx
Bone cancer (Health Content)
/websitefiles/dev/cbadger/sitesearch/pages/content/adam-article?productId=107&pid=33&gid=000023
Broken bone (Health Content)
/websitefiles/dev/cbadger/sitesearch/pages/content/adam-article?productId=117&pid=1&gid=000001
Bone tumor (Health Content)
/websitefiles/dev/cbadger/sitesearch/pages/content/adam-article?productId=117&pid=1&gid=001230
Long bones (Health Content)
/websitefiles/dev/cbadger/sitesearch/pages/content/adam-article?productId=117&pid=1&gid=002249

Custom List Widget Example



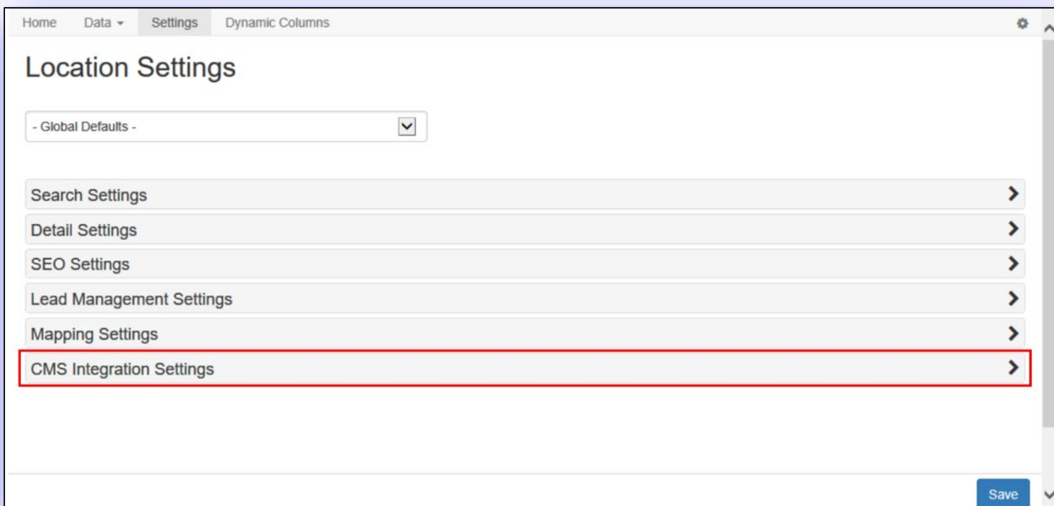
CONTENT APPS CONFIGURATION FOR CUSTOM CONTENT

For **Custom Content Types** to appear as options in the **Content Type** dropdowns, the **CMS Path** must be configured to point to the proper _*Custom Content* folder.

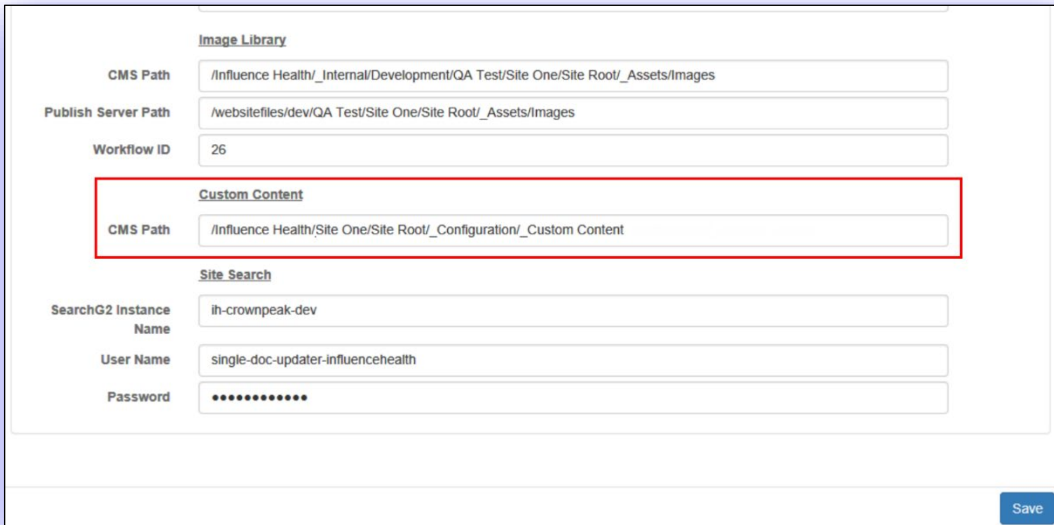
To Configure the CMS Path

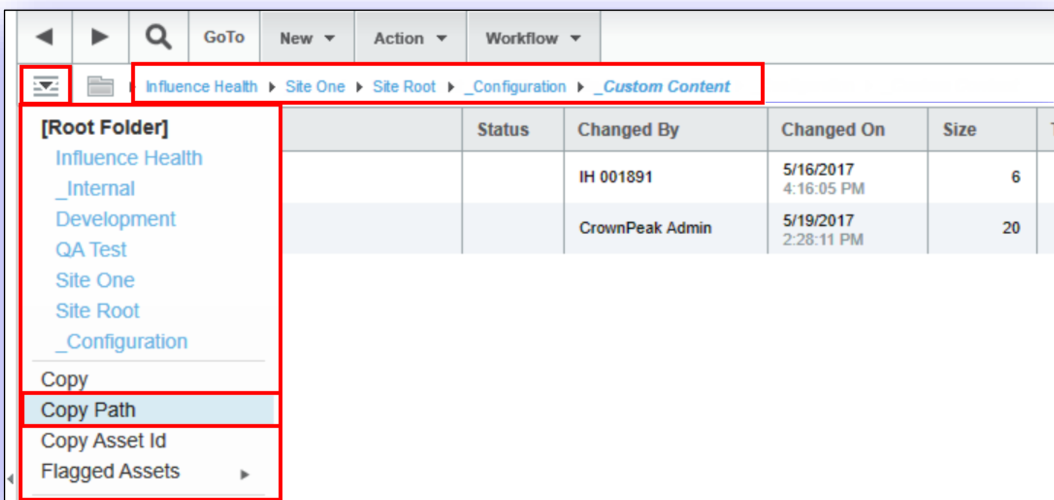
- Navigate to Locations **Settings** within **Content Apps**,
- Expand CMS Integration Settings,
- Scroll down to the Custom Content CMS Path,
- Paste the path of the **Custom Content** folder into the **CMS Path** and click **Save**.

Content Apps – Location Settings



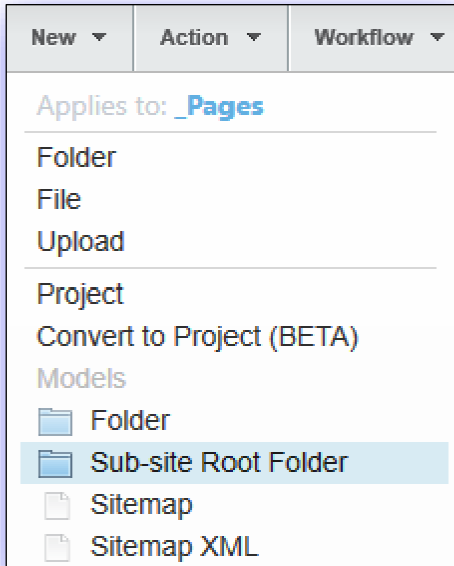
Custom Content Folder Path





CREATING SUB-SITES IN CMS AND FILTERING CONTENT APPS DATA SPECIFIC TO SUB-SITE

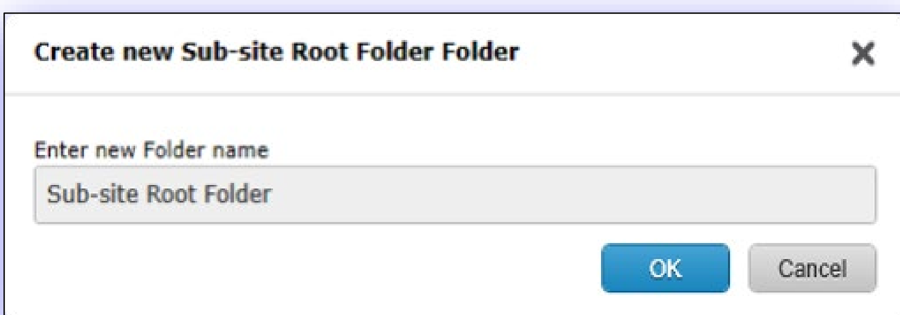
- Create a new folder within the **Site Root/_Pages** folder.



Note

A sub-site must be under the main/parent site domain and will use the main site publishing rules.

- Name the folder the name of the Sub-Site. Note that the name will be used in the URL of the site.

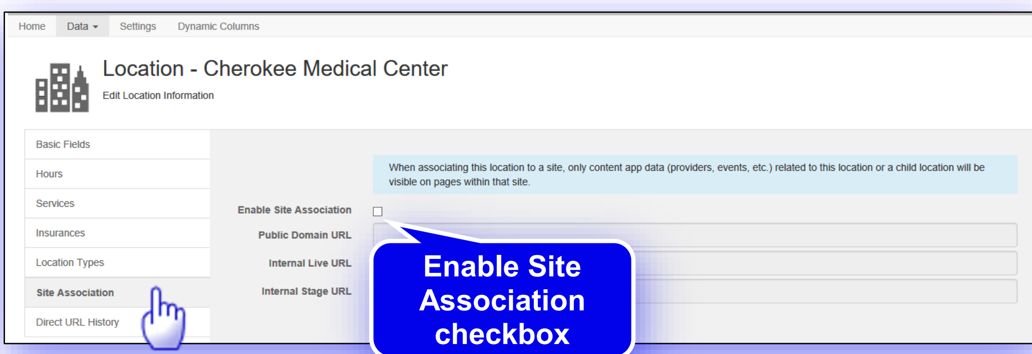


- The sub-site folder will contain the following sub-folders specific to the sub-site:
- **_Assets** (This option is used for digital asset management for this specific sub-site. Note that the main site assets may be used within the sub-site as well.)
- **_Configuration** (This option is used to configure the sub-site logo, site properties, utilities, top and footer navigation, SEO parameters, Google Analytics code and default content zones.)
- **_Pages** (This option Houses all the content pages for the sub-site.)

Note:

Sub-sites use their own master pages, so you will need to publish the sub-site master page (found in the Assets folder of the Sub-site).

- Configure the sub-site to filter **Content Apps** data specific to the sub-sites as follows:
- Associate a location to the sub-site by opening the **Locations Content App**, editing the desired location, and selecting the **Site Association** option from the **Location's** left menu.



The Site Association configuration will allow you the ability to break inheritance of the content apps from the Global (Site) level to the Sub-site level.

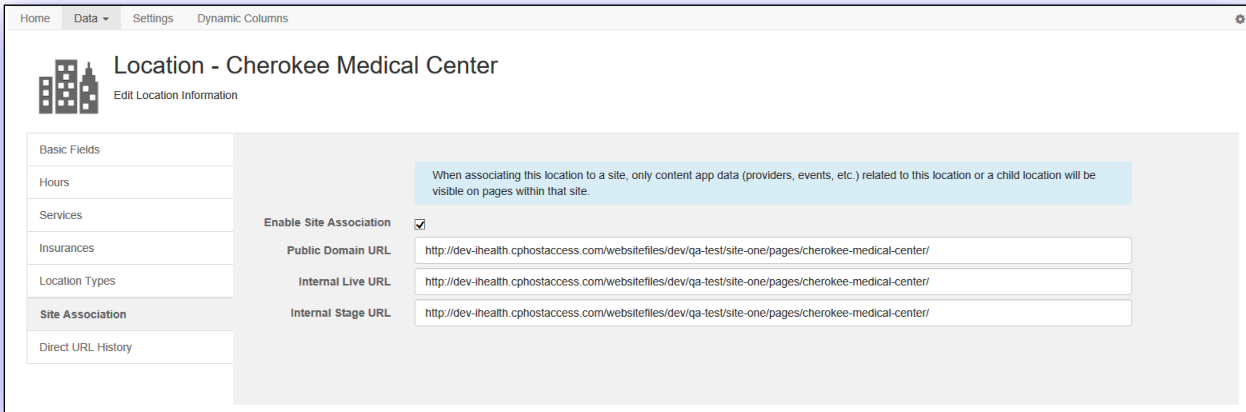
- Check the **Enable Site Association** checkbox to enable the **Public Domain URL**, **Internal Live URL** and **Internal Stage URL** fields.

- Enter fully qualified URLs[10] for the **Public Domain URL**, the **Internal Live URL** and the **Internal Stage URL** to include the **http://** and the domain. However, if **default** is in the URL,

[10] A fully qualified URL contains "http://" (or "https://www").

you will want to remove **default**.
Example: **http://www.healthsystem.com/sub-site-name**

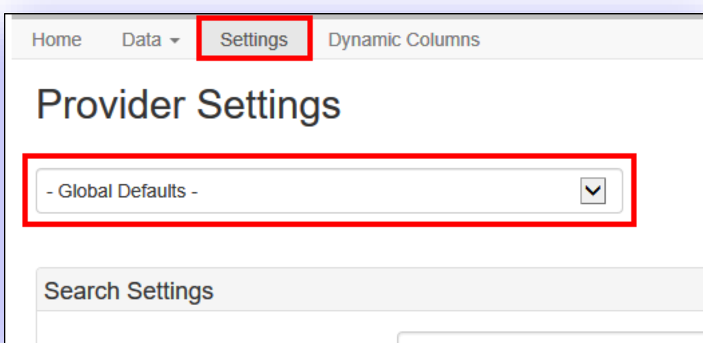
- When associating a location to a site or sub-site, only the **Content App** data (**Providers**, **Events**, etc.) related to the location will be visible on pages and **Content App** searches within the site / sub-site.



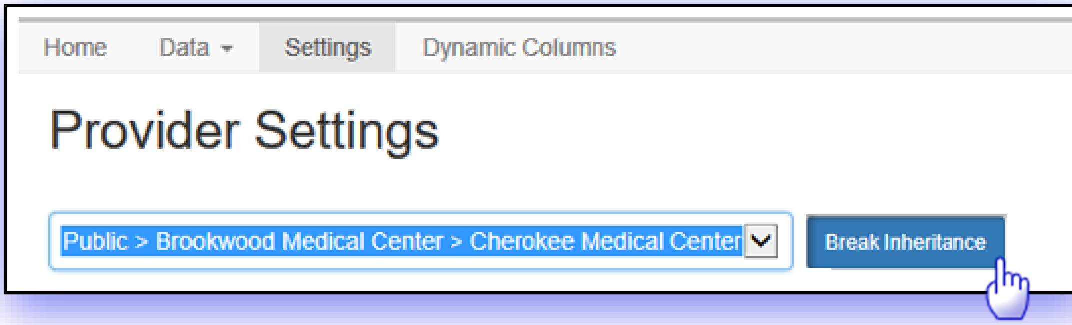
Site Search from the sub-site will still perform a global site search (not just a sub-site search).

- Save the configuration.

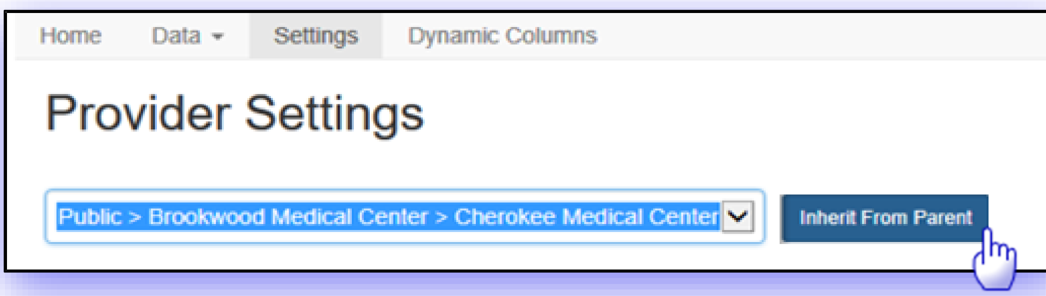
- Go to the **Providers Content App**, choose **Settings** from the top menu. At the top-left corner of the **Provider Settings** page, change the drop-down value from **Global Defaults** to the desired location (i.e. sub-site) value.



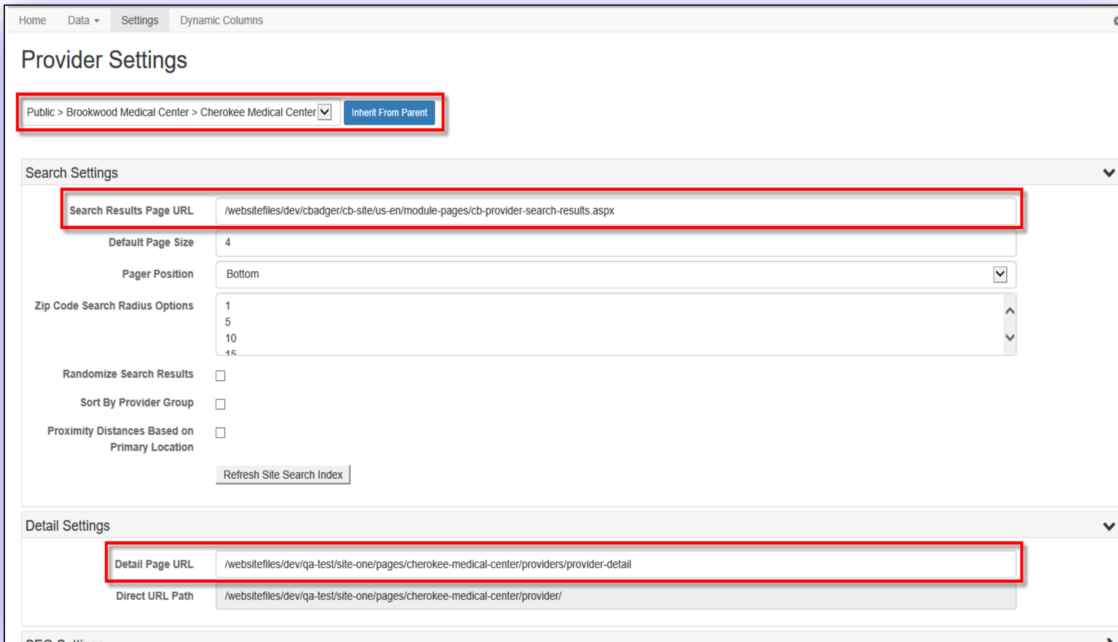
- Click **Break Inheritance** and then click **Save**.



To **un-break** inheritance, simply click the **Inherit from Parent** button and then click **Save**.



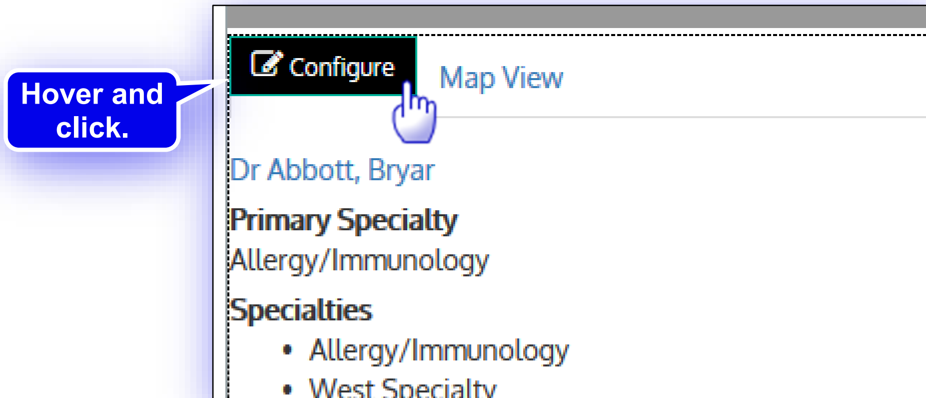
- Ensure that the Content App Search Results Page URL and Detail Page URL point to the correct Detail page.



- If they do not already exist, create the **Content Apps** pages (**Provider List**, **Provider Detail**, etc.) within the sub-site folder structure. For example: Domain Name/Site Root/_Pages/Sub-Site Name/_Pages/Providers/.

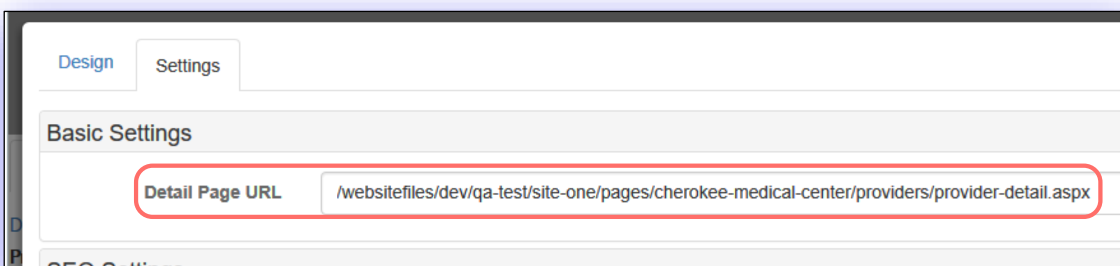
- Configure the **Content App** page URLs (**Provider List**, **Provider Detail** pages), so that they include the relative sub-site URL. To do so, preview the page within the sub-site.

- Hover over the content area and click **Configure**.

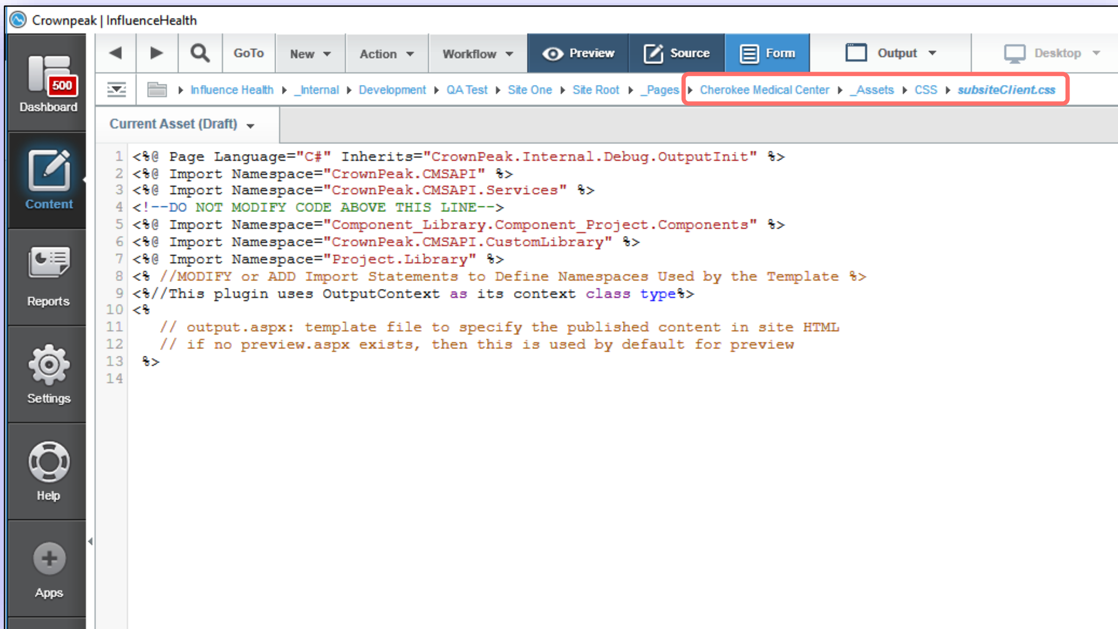


- Choose the **Settings** tab at the top of the window and then change the **Detail Page URL** to use the relative path of the sub-site, as in the example below:

e



- Sub-sites additionally allow different styling than the main site. These settings can be changed by navigating to the sub-site within the folder structure, choosing the **_Assets** folder, then the **CSS** folder to reveal the configurable CSS. For example: subsiteClient.css.


Crownpeak | InfluenceHealth
Dashboard
Content
Reports
Settings
Help
Apps
GoTo
New
Action
Workflow
Preview
Source
Form
Output
Desktop
Influence Health ▸ _Internal ▸ Development ▸ QA Test ▸ Site One ▸ Site Root ▸ _Pages ▸ Cherokee Medical Center ▸ _Assets ▸ CSS ▸ subsiteClient.css
Current Asset (Draft)
<%@ Page Language="C#" Inherits="CrownPeak.Internal.Debug.OutputInit" %>
<%@ Import Namespace="CrownPeak.CMSAPI" %>
<%@ Import Namespace="CrownPeak.CMSAPI.Services" %>
<!--DO NOT MODIFY CODE ABOVE THIS LINE-->
<%@ Import Namespace="Component_Library.Component_Project.Components" %>
<%@ Import Namespace="CrownPeak.CMSAPI.CustomLibrary" %>
<%@ Import Namespace="Project.Library" %>
<% //MODIFY or ADD Import Statements to Define Namespaces Used by the Template %>
<%//This plugin uses OutputContext as its context class type%>
<%
// output.aspx: template file to specify the published content in site HTML
// if no preview.aspx exists, then this is used by default for preview
%>

healthgrades™

PERSONALIZATION SETUP INSTRUCTIONS, WHAT IS WCO?

The **Web Content Optimizer (WCO)** is the ideal Personalization platform. It is a robust content delivery engine that provides testing and targeting capabilities at run-time, all on the client-side. **WCO** gives clients all the power they need to quickly and easily deliver and test content, capture form data and target content to specific users, with real-time reports and analytics.

WCO TARGETING GROUPS

Targeting Groups are used to help website visitors focus on items of interest, for example displaying an East Coast conference to a website visitor from Vermont. This feature enables editors to easily create targeting groups using drag-and-drop technology. The ability to use drag and drop has made using this feature more intuitive and allows much quicker building of **Targeting Groups**.

Targeting Groups describe which visitors can see your content, based on a set of **Targeting Rules** or conditions that you specify and whether or not they match these conditions.

For example, you can deliver optimized and personalized content to visitors who:

- Visit your site on a specific date or at a specific time of day.
- Visit your site on certain devices or browsers.
- Visit your site from certain sources (search engine, social media sites) or geolocations (regions, states, countries and ZIP codes).
- Have viewed or interacted with certain parts of your site.
- Have filled out a form and entered or selected certain field values.
- Have a profile in your backend systems or any third-party CRM or Marketing Automation platform.

WCO Targeting offers the best experience to manage, optimize and personalize your visitors' web experience, directly in the CMS, since it:

- Is fully and directly integrated in the CMS authoring experience.
- Leverages a simple drag-and-drop user interface to ensure ease of use.
- Requires *no* reading, editing, or copying of code.
- Is designed to integrate with third party systems such as CRM's and Marketing Automation systems.
- Contains many the most popular **Targeting Group** examples to get you started.
- Offers a large number of **Targeting Rules** to choose from including **Time**, **Date**, **Geolocation**, **Browser**, **Device**, **Form** fields, query-string parameters, page views and conversions, back office and 3rd-party attributes, and more.
- Can store hundreds of custom **Targeting Groups** and **Targeting Rules** combinations.
- Measures your marketing campaign success via the **Analytics** and **Optimization Dashboards**.

HOW TO USE TARGETING GROUPS
CMS allows authors and editors to vary the content of **WCO Snippets** which can be applied to text and WYSIWYG controls, directly within your CMS pages.

Creating and managing a targeting campaign within the CMS is done by defining your content variants in a **WCO Snippet**, and the associated **Targeting Groups** that describe the visitors you want to target. Both new and existing **Targeting Groups** can easily be managed via a new drag-and-drop user interface, allowing the author to select from a number of **Targeting Rules** to define the audience or persona they want to target.

Targeting Rules fall into the following categories:

- **Ambient** (Data or attributes that are readily available for all visitors including anonymous visitors.)
- **Source** (This data describes how the visitor arrived at your site.)
- **Demographic** (This data shows what is known about the user from their web connection.)
- **Behavioral** (This data describes the visitor's interactions and engagement level on your site by tracking page views, and conversions.)
- **Form** (This data is collected from any form on your site.)
- **Integration** (This data is retrieved from your backend system, or any 3rd party system via WCO's connectors.)

TARGETING RULES
Use the following **Targeting Rules** to create your **Targeting Groups**:

RULE TYPE	USE CASE	EXAMPLE
Time	Target users based on time of day they visit the site.	Target "at word" visitors if they visit during the day and "at home" if they visit in the evening.
Date	Target users based on date or date-range they visit the site.	Deliver content at beginning, before, after or during a campaign.
Device	Target user based on device and browser, or on a custom condition in their browser agent.	Deliver relevant content to iPhone or Safari users or based on their specific Operating System.
Referrer	Target users based on the previous site they were on prior to arriving at yours.	Identify users from search engines, social media sites or partner sites.
Location	Identify and target users from specific regions, states, countries or zip code ranges.	Target users in Texas.
Snippet	Target users who view any snippet on any page in your site.	Track user interest based on pages viewed.
DemandBase*	Target users with specific DemandBase attributes based on their IP address.	Identify competitors, partners, and/or potential customers in various industry segments.
Marketo*	Target users based on their Marketo profile.	Optimize your visitor's site experience with data from Marketo.

**** Require third party integration***

STEP-BY-STEP WORKFLOW TO SUCCESSFUL TESTING AND TARGETING

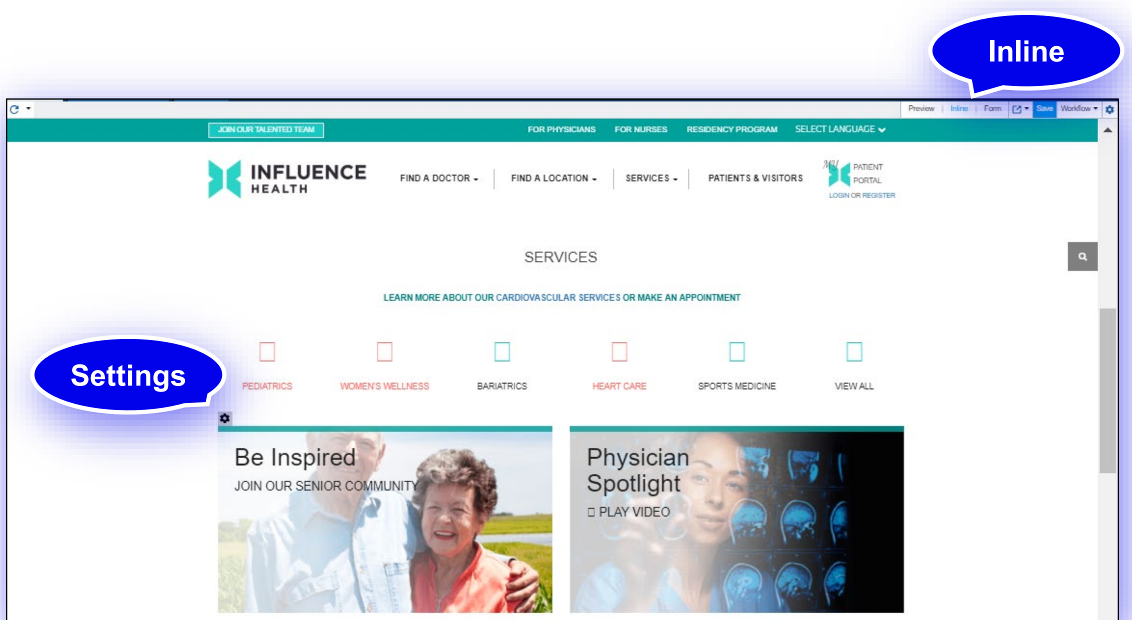
The workflow diagram below, illustrates the steps involved in setting up variants of content for your site.

- Assign to any **WYSIWYG** on a page.
- Create a **Snippet**.
- Set up a Testing or Targeting Variant.
- Set up a **Targeting Group** with rule set, if targeted content.
- Add content to your **Testing** or **Targeting Variants** in the **WYSIWYG** editor.
- Set up **Conversion** links to track.
- Assign your **Snippet** to **Collection** for analytics.

ADD TARGETING GROUPS TO PAGE ELEMENT

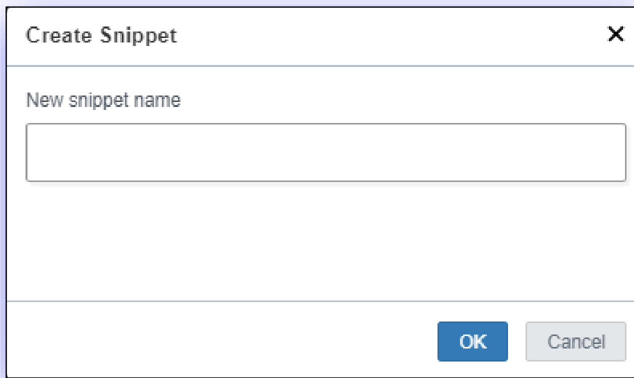
In **Edit** mode:

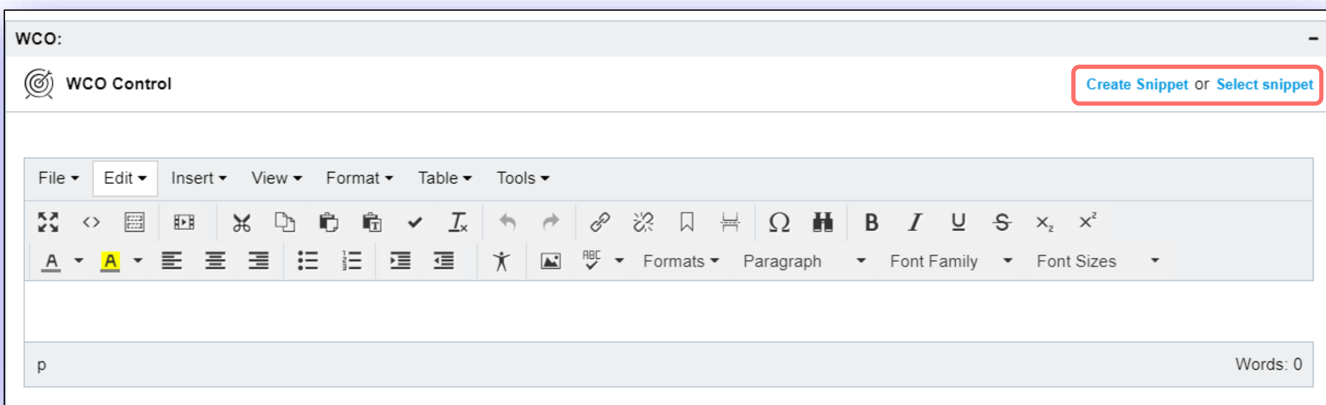
- Navigate to the page where you want to set up a variant of content, i.e. Personalization or a **Testing Variant**.
- Open the selected asset in **Inline** edit mode by clicking the **Inline** tab, as shown below, then hovering over the specific page element until you see the **Settings** tool wheel icon.
- Click the **Settings** icon that displays at the top-left of that element on hover.
- Select any **WCO** control on the page
- A set of actions will appear in the white menu bar just above the editor
- If you already have a snippet, skip to the next stop, otherwise click on **Create Snippet** to create a new snippet. Enter the snippet name when prompted.
- Click on **Add Targeting Variant** to define a new content variant.
- Enter a name for your new variant.
- Associate the variant with a **Targeting Group**, either by selecting one from the dropdown, or by clicking on **Create Targeting Group,** which will launch **WCO's Targeting Groups** interface.
- Refer to the **Creating or Editing a Targeting Group** section below for detailed instructions on how to create a new **Targeting Group**. Once created, the **Targeting Group** will now be available for selection from the **Targeting Group** drop-down menu.
- Enter your optimized content for your newly created and/or selected **Targeting Group**.



CREATE A SNIPPET

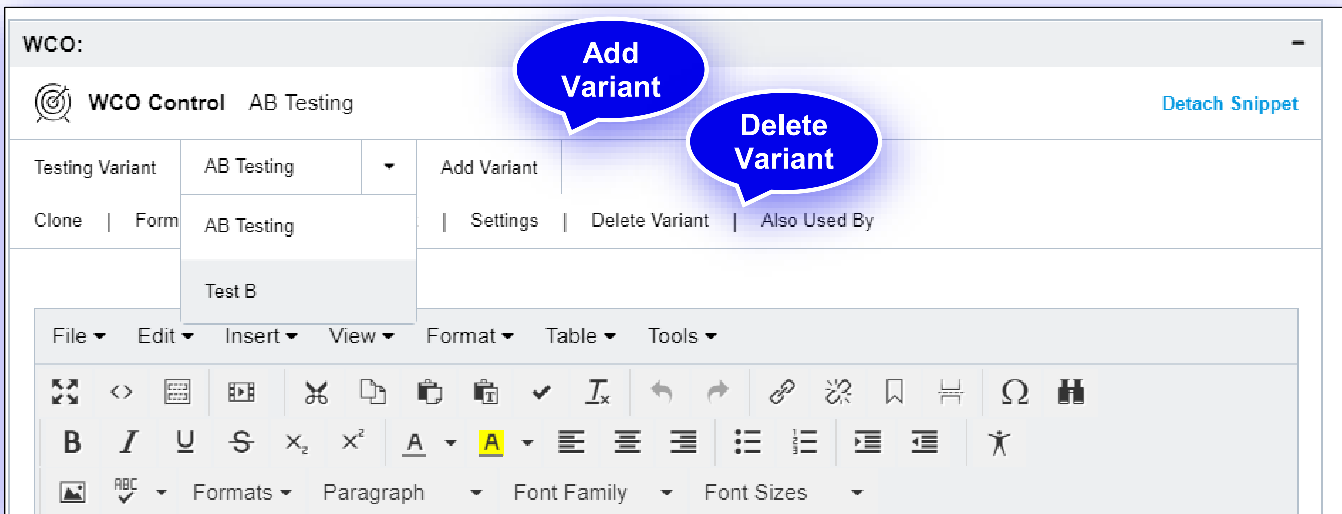
- Click on the **Clone** menu item or the **Create Snippet** icon. The **Create Snippet** dialog displays.
- Enter the name for your **Snippet**. It is recommended that you use a naming convention for example, {Facility}_{Location on Page}_{Type of Element}_{Element Description}: Home_CTA_Health Action.





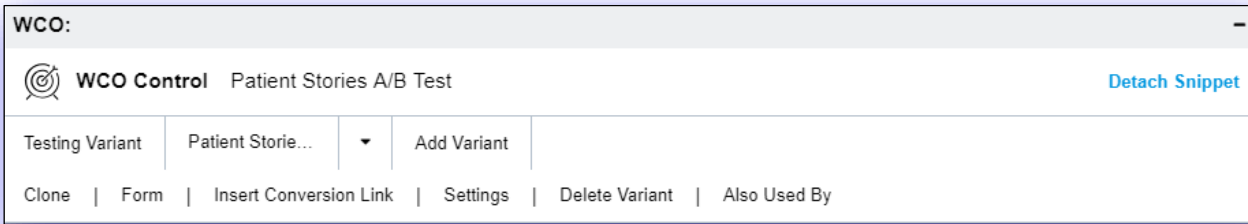
ADD VARIANTS INTO YOUR SNIPPET

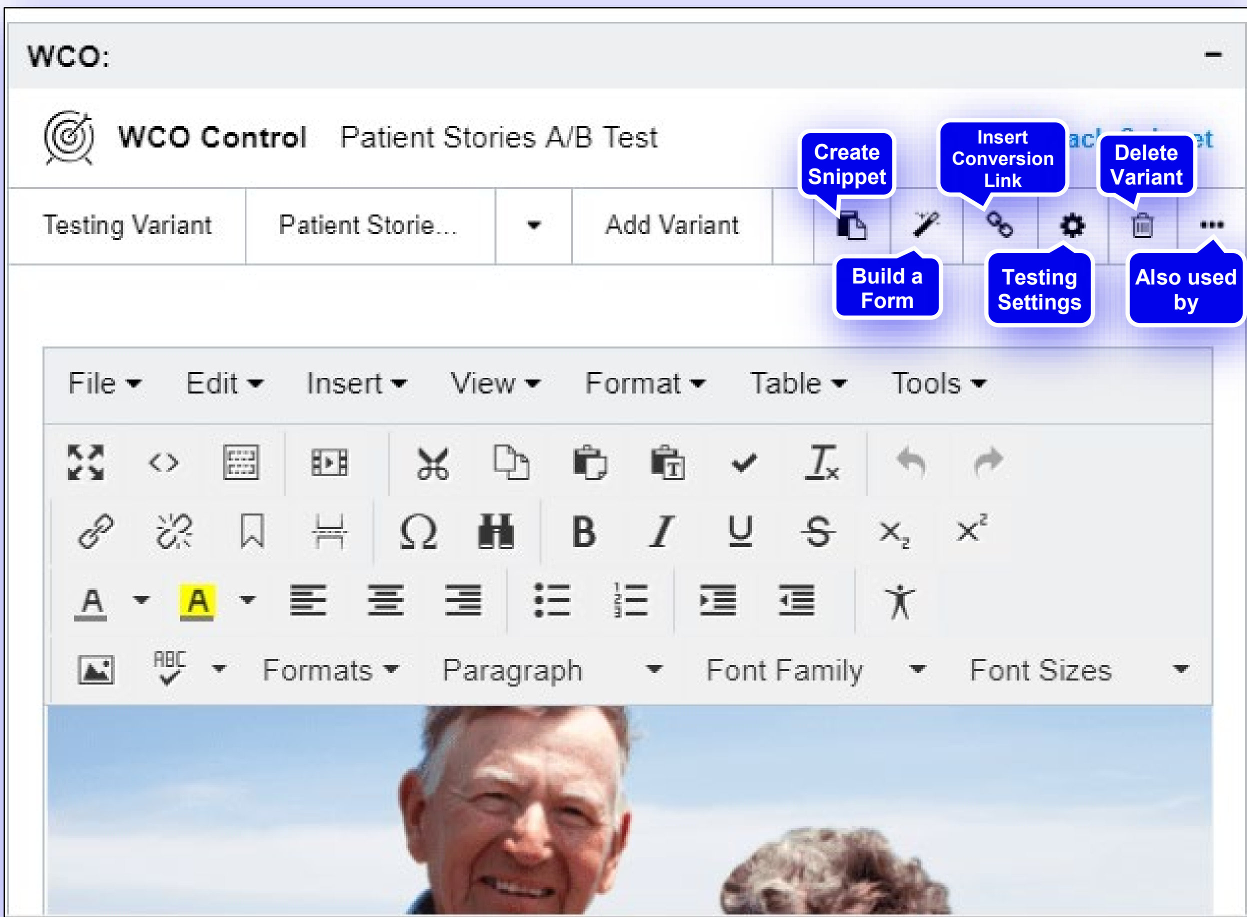
- Select Add Variant.
- Name your variant (You will see your variants in the dropdown as you create them.)
- Start adding content into each variant. Toggle between variants, by selecting each from the drop-down menu.
- Variants of content can be deleted via the **Delete Variant** button or menu item.
- As an example, the snippet might be *Orthopedics*, with Variants: *Location A, Location B,* and *Location C*.



ADD TESTING OR TARGETING VARIANTS MENU

Depending on your **Zoom** level, you may see a menu or menu with icons.



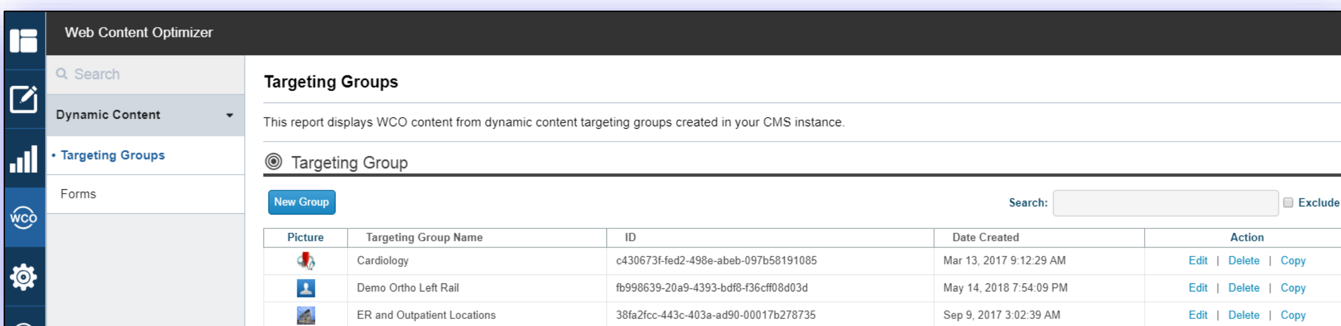


OVERVIEW OF STEPS

Key Concept
Always set **Snippets** and **Targeting Variants** on the page element itself. Make your configuration changes, then save and publish.

CREATING OR EDITING A TARGETING GROUP

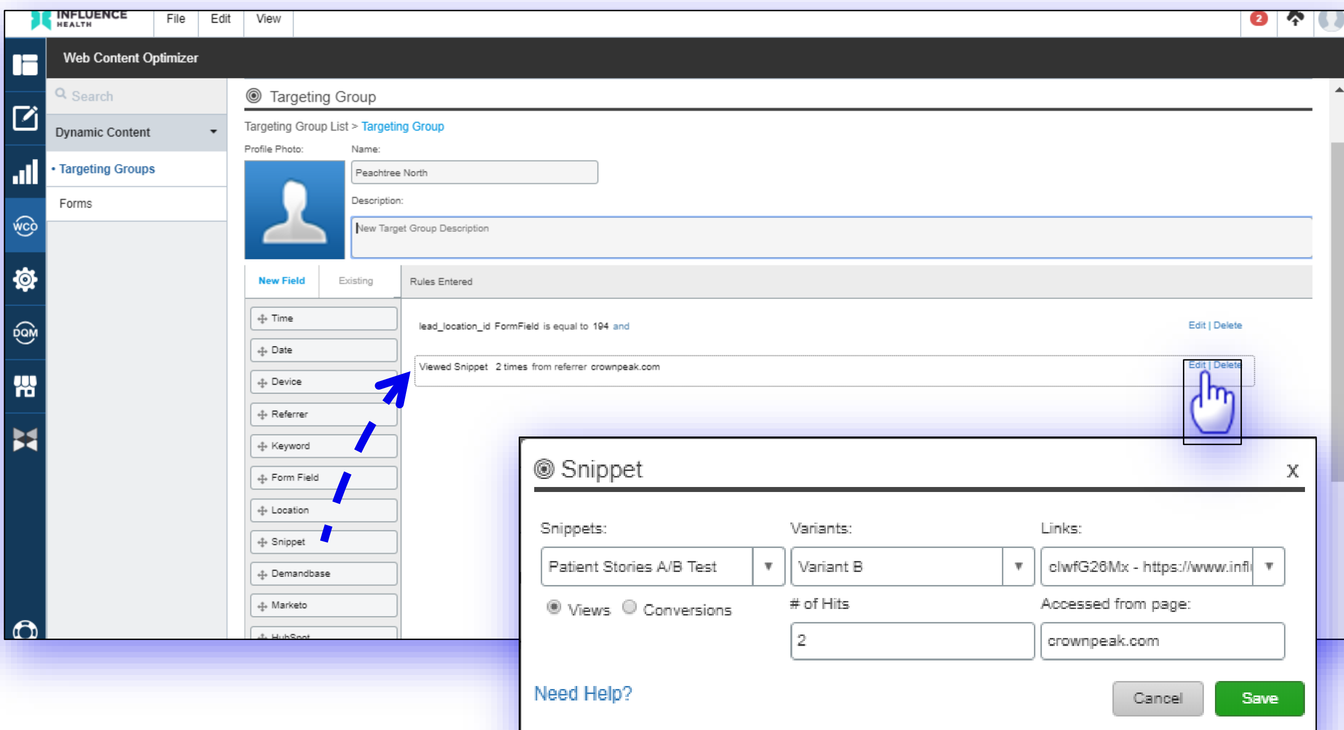
- Launch the **WCO Targeting Groups** interface from the left navigation **WCO** icon.
- To create a new **Targeting Group**, select the **New Group** button.
- To edit an existing **Targeting Group**, click the **Edit** link next to one of the pre-existing forms in the table.
- The **WCO** drag-and-drop **Targeting Group** window will appear.
- Enter a name in the **Group Name** field at the top of the page.
- Add a **Description** (field has a character limit of 150).
- (Optional) Add an image for the **Targeting Group**.
- Click Profile Photo.
- In the **Upload Photo** window, select **Browse**.
- Select an image from your hard drive and click **Open**.
- In the **Upload Photo** window click **Upload**.
- The selected image will be displayed for your **Targeting Group**.
- Select from the list of 11 **New Rule** or custom **Existing** rule types.
- Drag the desired rules(s) into the **Targeting Group**.
- Click **Edit** next to each new rule and enter the rule criteria.
- Save the **Targeting Group** by clicking the **Save** button.
- The **Group Saved Message** displays. Your **Targeting Group** is now ready to use within **WCO**.



ADDING SNIPPET TO TARGETING GROUP, OR ASSOCIATING EXISTING SNIPPET
Drag the **Snippet Rule** item into the main **Rules Entered** area of the **Targeting Group** edit screen. Click the **Edit** button for the **Snippet Rule** to display its edit dialog. In the **Snippet** dialog that displays (below), when you click **Edit**, you can associate and configure your **Snippet** with **Variant** and **Links** from the drop-down lists.

Do you want to count **Views** or **Conversions**? Select your chosen option from these two radio buttons. Enter the number of hits (**# of Hits**) to count, for the page assessed from (**Assessed from Page**), in the free-text entry fields.

- The number of hits (**# of Hits**) entered tells CMS that if the consumer goes to this page, or section of your site and hits the page that number of times, that this is an interested consumer and will serve up the variant you want them to see. These stats will show up in your **Dashboard Analytics**.



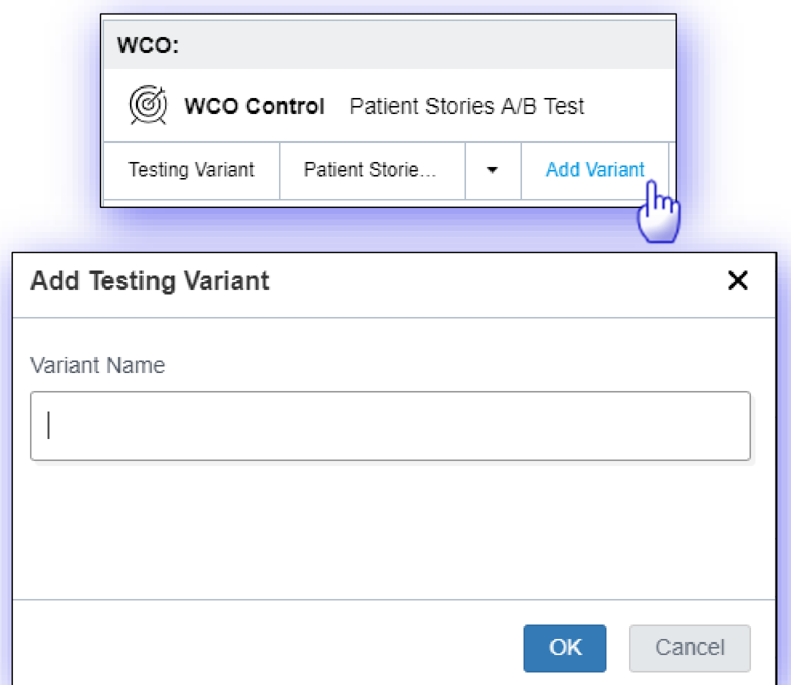
HOW TO SET UP A TESTING VARIANT

The **WCO** testing panels allow you to see the results of your testing variants in one chart. The panel displays **Testing Variants** with the following information:

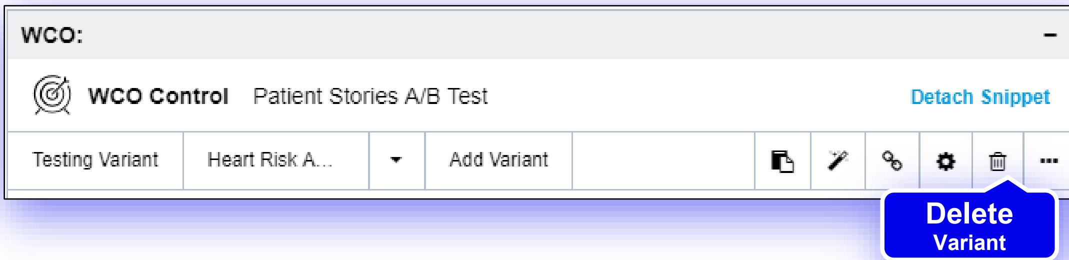
- Variant Name
- Distribution Percentage
- Number of Visits
- Conversions
- Conversion Rate

The data can be displayed based on a rolling number of days (*7, 14, 30* or *90*), or according to a timeframe: *This Month, This Quarter, Last Month or Last Quarter*. Additionally, the default display will show the **Conversion Rate** winner from your testing variants.

- Click the **Add Variant** menu item to add a **Testing Variant**.
- In the **Add Testing Variant** dialog that displays, give your variant a meaningful name, specific to what you are targeting, for example: *Heart Risk Assessment.*



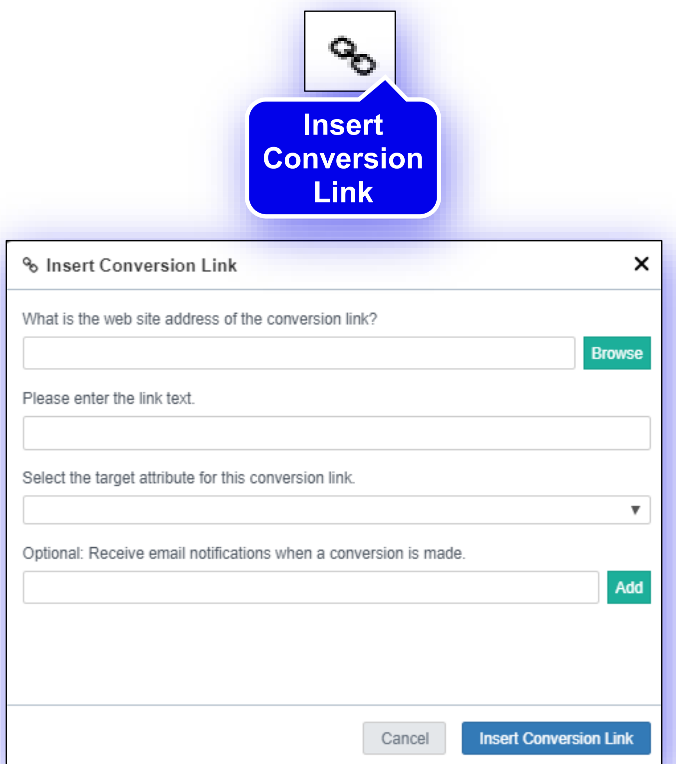
You can delete a variant, if needed using the icon or menu item.



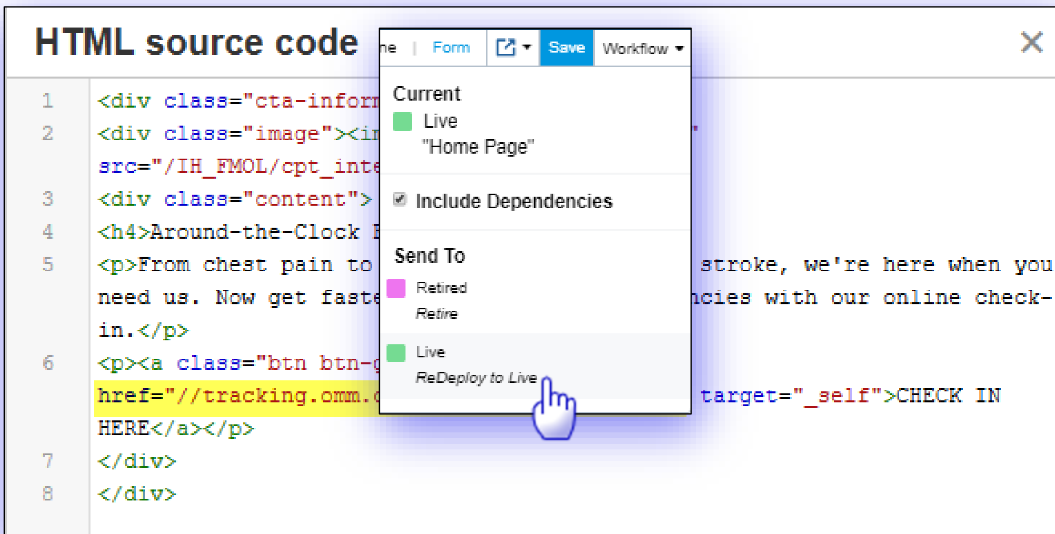
SETTING UP CONVERSIONS

Click on the **Insert Conversion Link** menu item or icon. The **Insert Conversion Link** dialog displays. Enter the requested information in the fields of the dialog as follows:

- **What is the address of the conversion link?** (Enter the URL of where the call-to-action should go, or use the **Browse** button.)
- **Please enter the link text**. (Enter the name of the link the consumer will click on, for example: Take Free Assessment.)
- **Select the target attribute for this conversion link.** (How do you want this conversion link to open? Options are: *_self, _blank, _top, _parent*
- *_blank* opens the linked document in a new window or tab.
- *_self* (default) opens the linked document in the same frame where it was clicked.
- *_top* opens the linked document in the full body of the window.
- *_parent* opens the linked document in the parent frame.)
- **Optional: Receive email notifications when a conversion is made.** (Enter a correctly-formatted email address here; then click the **Add** button, if and where you want to receive an email *each time* a consumer clicks on the link on the website.
- Click **Insert Converion Link** to save your selections.



You will see a line of code now displayed under **HTML Code** that you've created with your selections. The purpose of this conversion code is for tracking how many people click on the personalization element, or call to action (CTA).



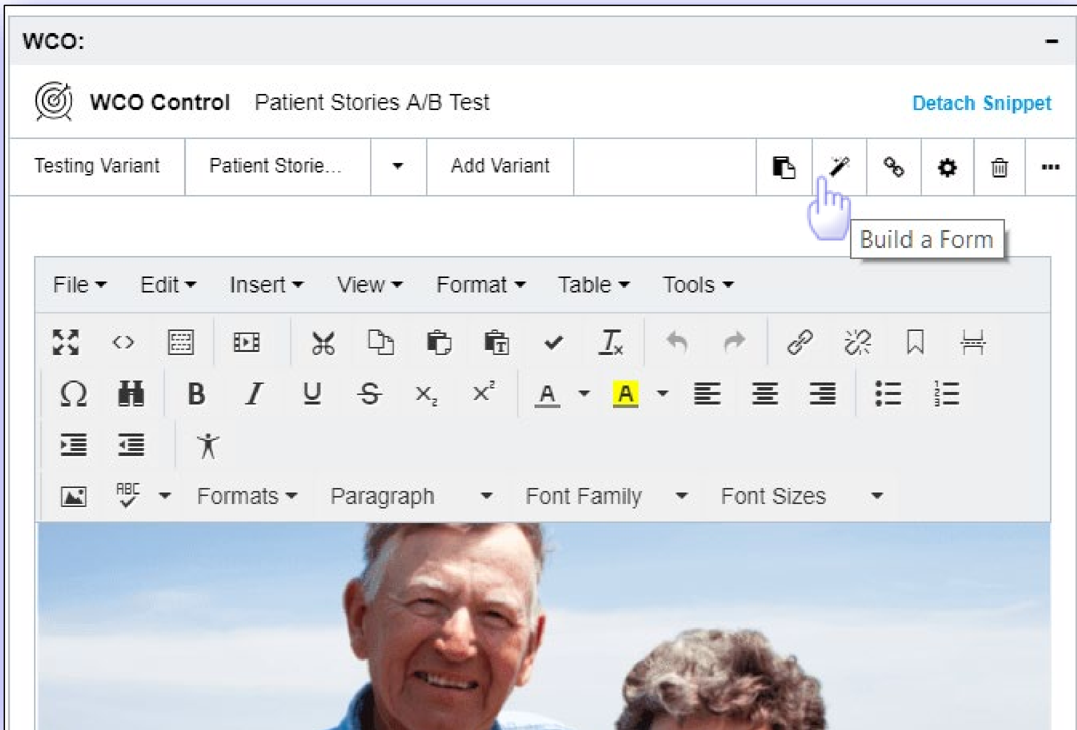
Save and publish your page via the **Workflow** to take your changes live.

WHAT ARE SNIPPETS?
A snippet is a piece of code which is used by WCO. The snippet is the backbone to creating a testing/targeting piece on your webpage. Within a snippet you can:

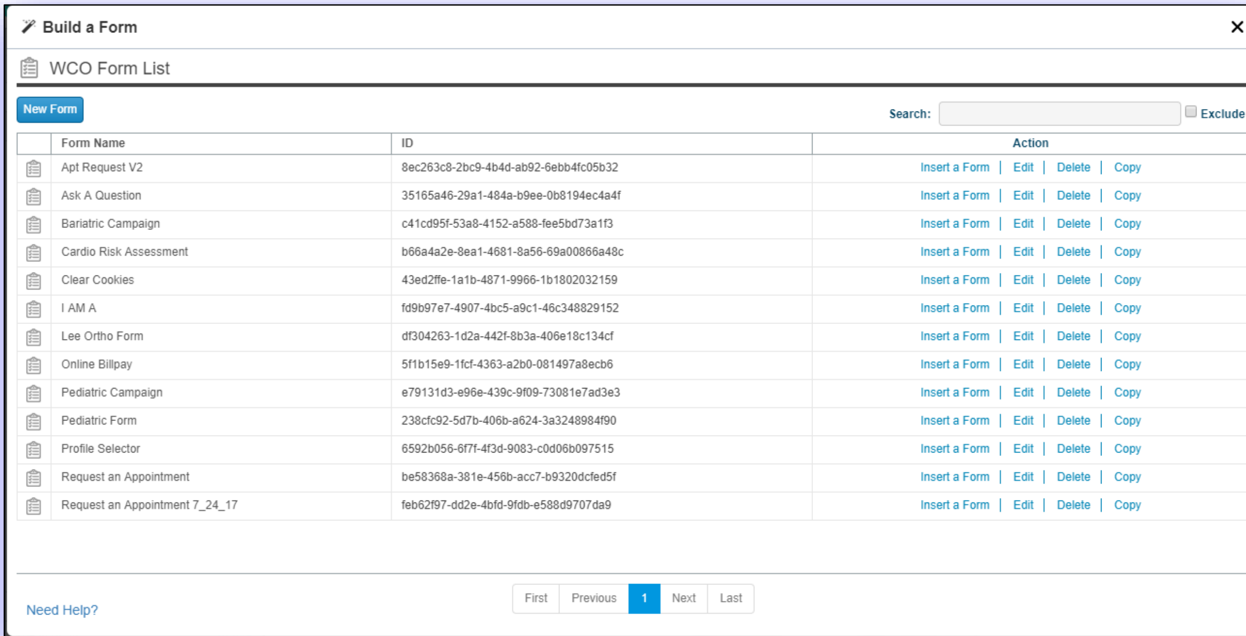
- Insert a **Form**.
- Insert a **Conversion Link**.
- Target your content to offer slightly different content based on information, such as the web visitor's location.
- Change the text or image based off a **Testing Variant**.

HOW TO BUILD A FORM

See the first few steps of [Add Targeting Groups to Page Element] for additional navigation tips. After selecting your asset, in **Inline** mode, in the **Settings** > **WCO** control view, click the **Build a Form** icon or menu item.



The **Build a Form** edit screen displays.



Build a Form

WCO Form List

New Form

Search: Exclude

	Form Name	ID	Action
	Apt Request V2	8ec263c8-2bc9-4b4d-ab92-6ebb4fc05b32	Insert a Form | Edit | Delete | Copy
	Ask A Question	35165a46-29a1-484a-b9ee-0b8194ec4a4f	Insert a Form | Edit | Delete | Copy
	Bariatric Campaign	c41cd95f-53a8-4152-a588-fee5bd73a1f3	Insert a Form | Edit | Delete | Copy
	Cardio Risk Assessment	b66a4a2e-8ea1-4681-8a56-69a00866a48c	Insert a Form | Edit | Delete | Copy
	Clear Cookies	43ed2ffe-1a1b-4871-9966-1b1802032159	Insert a Form | Edit | Delete | Copy
	I AM A	fd9b97e7-4907-4bc5-a9c1-46c348829152	Insert a Form | Edit | Delete | Copy
	Lee Ortho Form	df304263-1d2a-442f-8b3a-406e18c134cf	Insert a Form | Edit | Delete | Copy
	Online Billpay	5f1b15e9-1fcf-4363-a2b0-081497a8ecb6	Insert a Form | Edit | Delete | Copy
	Pediatric Campaign	e79131d3-e96e-439c-9f09-73081e7ad3e3	Insert a Form | Edit | Delete | Copy
	Pediatric Form	238cfc92-5d7b-406b-a624-3a3248984f90	Insert a Form | Edit | Delete | Copy
	Profile Selector	6592b056-6f7f-4f3d-9083-c0d06b097515	Insert a Form | Edit | Delete | Copy
	Request an Appointment	be58368a-381e-456b-acc7-b9320dcfed5f	Insert a Form | Edit | Delete | Copy
	Request an Appointment 7_24_17	feb62f97-dd2e-4bfd-9fdb-e588d9707da9	Insert a Form | Edit | Delete | Copy

Need Help?

First Previous 1 Next Last

Actions

In the **Build a Form** edit screen, the familiar **Actions** section contains four options:

- **Insert a Form** (Click this option to insert the existing form below your selected asset.)
- **Edit** (Click this option to edit the existing form. This opens the **WCO Form Builder** screen. Any revisions saved here will overwrite the data on your existing form.)
- **Delete** (Click this option to delete the existing form. A confirmation dialog will display prior to deletion, for you to confirm deletion.)
- **Copy** (Click this option to copy the existing form. This opens the **WCO Form Builder** screen, with existing data from the copied form populated in the fields, so that you can edit it and save your changes, to create a similar form, without affecting the original form.)

Buttons

- **Create a New Form** (This opens the **WCO Form Builder** screen, with no data, so that you can create a new form.)
- **Cancel** (Click this button to cancel your changes and return to the previous screen.)
- **Next Step** (Click this button to proceed to the next step in building the form.)

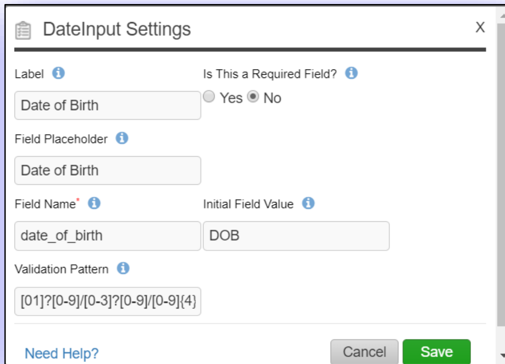
Tabs

Drag any of the fields listed below onto the form and use their **Edit** control at the far right to configure contextual fields. Information icons provide additional information on each field of the dialog. Below is the edit screen for the **Date of Birth** field. After entering required data, click the **Next Step** button to configure additional options, as described in Next Step, Tabs, WCO Form Builder.

- **Textbox**
- **Text Area**
- **Dropdown List**
- **Radio Buttons**
- **Checkboxes**
- **Hidden Field**
- **US Phone Number**
- **Intl Phone Number**
- **US Currency**
- **EU Currency**
- **US Date**
- **EU Date**
- **Email**
- **URL**
- **reCAPTCHA**
- **Existing Accepted Insurance**
- **Account Number**
- **Address**
- **Amount**
- **Best Way to Contact Me**
- **City**
- **Date of Birth**
- **email2**
- **Facility**
- **First Name**
- **first_name**
- **Gender**
- **Hidden Field**
- **Hidden Field**
- **Hidden Field**
- **Hidden Field**
- **Hidden Field**
- **Hidden Field**
- **I AM A**
- **Interest Area**
- **last_name_bariatric**
- **Patient First Name**
- **Patient Information**
- **Patient Last Name**
- **phone_number**
- **Please send me periodic updates about Women's Health related topics.**
- **Preferred Location**
- **Profile Selector**
- **Provider**
- **Reason for Visit**
- **Specialty**
- **State**
- **Take a FREE Risk Assessment**
- **Take a FREE Risk Assessment**
- **Test Snippet**
- **Would you like a free Fitness Pass?**

- **Yes Add Me to Your Mailing List**
- **Your Age:**
- **Your Question**
- **ZIP**

Date Input Settings



Placement

Click one of these options to position your form relative to your asset's placement on the page.

- None
- Top
- Right
- Left

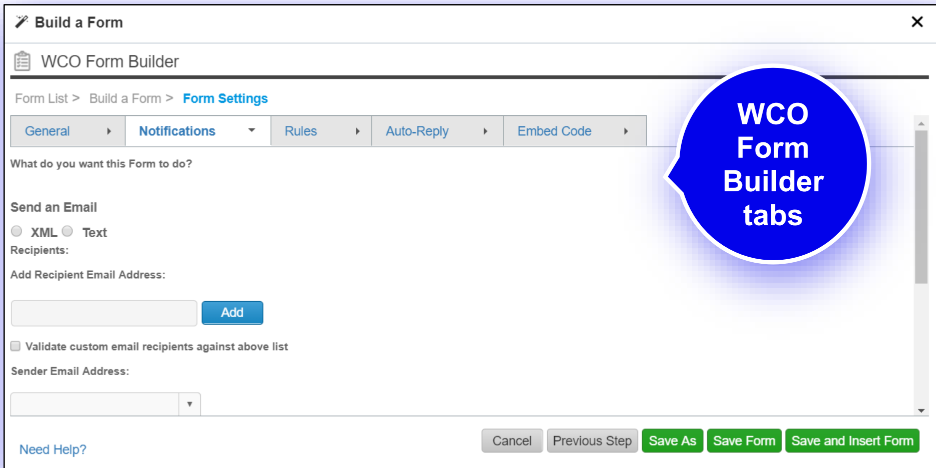
Next Step, Tabs, WCO Form Builder

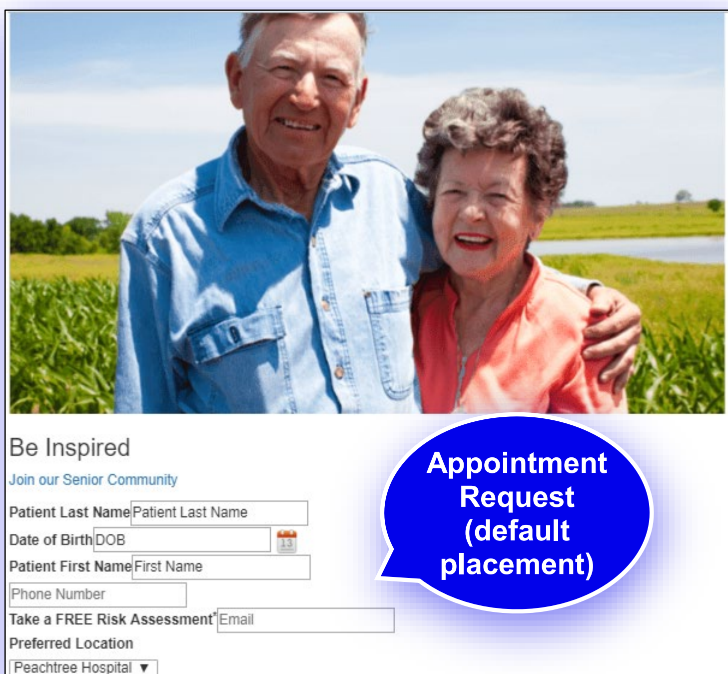
See the image below, to view the **WCO Form Builder** tabs, as described here. Navigate to each step using **WCO Form Builder's** intuitive features. Simply click on each tab to configure and continue. Buttons are: **Cancel**, **Previous Step**, **Save As**, **Save Form** and **Save and Insert Form**.

- **General** (In this tab screen, enter your **Form Name** and select *Yes* or *No* to the question, **Transmit form via HTTPS connection?**)
- **Notifications** (Answer the questions in this tab screen to indicate:
- What do you want this Form to do? Send an Email in your selected format: *XML* or *Text*.
- **Add Recipient Email Address** (Enter a valid email address and click the **Add** button.
- Select the checkbox to Validate custom email recipients against above list.
- Select your **Sender Email Address** from the drop-down options.
- The **Email Subject** is added for you.
- A standard message is entered for you under **Email Body**. For example: *Your request is being processed and we will be contacting you within 24 hours.* You can delete this message or append it with any text you want.)

- **Rules** (Answer the questions in this tab screen to indicate:
- **What is the redirect URL? *** (Required field, use the document icon to select your asset URL.)
- Select where to post data to, in addition to storing it directly in **Web Content Optimizer.** Use the checkbox to indicate**: Do not store form submission data**.
- Select a connector from the drop-down options (example: *Bariatric Campaign, Cardio Risk Assessment, etc.*) and click the **Add Connector** button.
- **Connectors** displays any previously added connector. Click the **x** icon to delete, if desired.)
- Auto-Reply (You have the option here to Clear Auto-Reply Settings.
- **Recipient Addresses Field: *** (Required field. Select from the drop-down options: for example *Patient Last Name, Date of Birth, Patient First Name.*)
- **Sender Email Address: *** (Required field. Select from the drop-down options.)
- **Email Subject: *** (Required field. Enter the subject of your email.)
- **Email Body: *** (Required field. Enter the content of your email.)
- **Email HTML Body:** (Enter the formatted content of your email.)
- **BCC Recipients:** (Add (or delete) any recipients for this field. Use the **Add** button after entering a valid email address.)
- **Add BCC Email Address:** (Add (or delete) any recipients for this field. Use the **Add** button after entering a valid email address.)
- **Embed Code** (In this tab screen under the **Code** tab (default) you can view the embed code of your form (once you have saved it) that has been created from your selections.)
- **Advanced** (If you select this tab, you can use your own form with **WCO**, by simply adding the following two form attributes to your own custom form:
- Form Action: Replace your current Form Action property with the following: (See screen.)
- Select Variant Form ID: Add the following Hidden Form Field to your existing form: (See screen.)

See the next page for sample screens of the above.


Build a Form
WCO Form Builder
Form List > Build a Form > Form Settings
General
Notifications
Rules
Auto-Reply
Embed Code
What do you want this Form to do?
Send an Email
XML
Text
Recipients:
Add Recipient Email Address:
Add
Validate custom email recipients against above list
Sender Email Address:
Need Help?
Cancel
Previous Step
Save As
Save Form
Save and Insert Form
WCO Form Builder tabs


Be Inspired
Join our Senior Community
Patient Last Name
Patient Last Name
Date of Birth
DOB
Patient First Name
First Name
Phone Number
Take a FREE Risk Assessment
Email
Preferred Location
Peachtree Hospital
Appointment Request (default placement)

SOME TIPS FOR EDITING WCO FORMS
Here are some tips on what to expect when editing WCO forms snippets, for admins and developers about editing WCO form snippets through CMS.

Body

- If you make an update to the **Form** settings itself (**Redirect URLs**, **Autoreply**, **Connectors**, etc.) it will be reflected automatically if your HTML forms use that **WCOFormID**.
- If the snippet *containing* your form is managed by a CMS asset, then it is not recommended to change it directly in the **WCO**, it will be overridden next time the asset with the **Snippet** is republished.
- Direct **WCO Snippet** changes are committed *immediately*, but do *not* update the asset's content *automatically* and are applicable only until the original page is redeployed (which will override your direct changes).

A Note about Updating Snippet Content after Editing

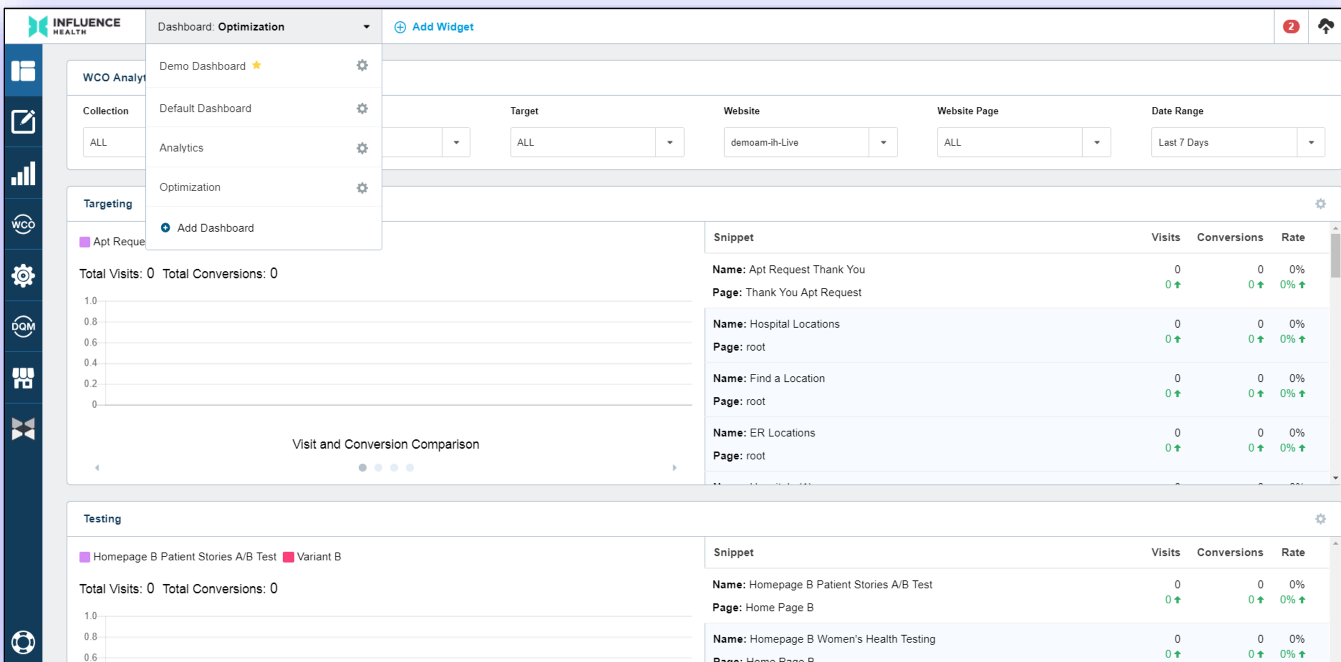
The actual HTML of the form is added to the **Snippet** content manually, or by selecting **Insert HTML Code at End of Snippet** when inserting a form, so:

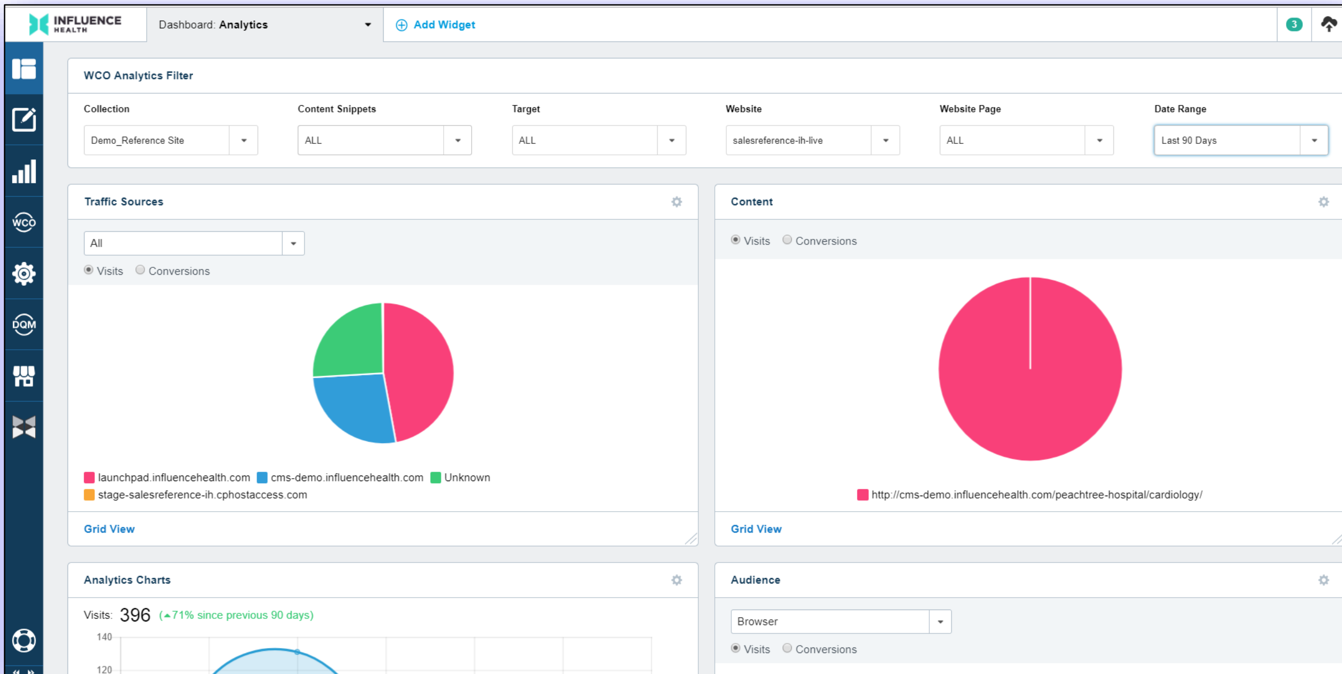
- If you add or remove fields from the **Form** you will need to update the **Snippet** content, even if you make the edits directly in the **WCO Form** editor.
- In other words, if **Snippet** *X* uses **Form** *A*, and you edit **Form** *A directly,* by adding new fields, the form HTML in **Snippet** *X won't be updated automatically*, so it won't include those new fields.
- If you add or remove **Form** fields *directly* through **WCO** the **Snippet** content won't be updated automatically.

REPORTING

Access **Reports** via the **Dashboard** to see high-level results. To drill down into specific variants, select either **Analytics** or **Optimization** in the **Dashboard** dropdown.

- Collection
- Content Snippets
- Target
- Website
- Website Page
- Date Range




INFLUENCE HEALTH
Dashboard: Analytics
Add Widget
WCO Analytics Filter
Collection
Demo_Reference Site
Content Snippets
ALL
Target
ALL
Website
salesreference-ih-live
Website Page
ALL
Date Range
Last 90 Days
Traffic Sources
All
Visits
Conversions
launchpad.influencehealth.com
cms-demo.influencehealth.com
Unknown
stage-salesreference-ih.cphostaccess.com
Grid View
Content
Visits
Conversions
http://cms-demo.influencehealth.com/peachtree-hospital/cardiology/
Grid View
Analytics Charts
Visits: 396 (71% since previous 90 days)
140
120
Audience
Browser
Visits
Conversions

TARGETING GROUPS FAQ
Question:
Does WCO support AND / OR logical operations?

Answer:
WCO automatically inserts an "AND" after every **Targeting Rule**. This allows you to create target audiences that are as specific as your business requirements dictate.

In cases where you need to deliver the same content to different target audiences, **WCO** provides a number of techniques to facilitate this requirement

- Most **WCO Targeting Rules** support an **Is Contained in** and **Is Not Contained in** logical operations which allow you to define any number of values you would like to match against.
- These values should be clearly delimited by a space, comma, or a pipe.

Examples:

- **Demographic**: **Geo-Location**: **State** *is contained in* "CA", "NY", "TX".
- **Form: Field Value: JobTitle** *is contained in* "Marketer", "Project Manager", "IT Developer".

Certain ambient attributes such as Browser and Device provide checkboxes to select from. You may choose one or more checkboxes with an implied OR.

Examples**:**

- **Ambient**: **Browser**: Chrome, Safari, IE
- **Ambient**: **Device**: iPhone, Android, Blac**kberry**
-
- Behavioral attributes natively support **OR** operations, due to the parent/child relationship between **Snippets** and their variants, as well as between **Variants** and embedded **Conversion Links**
- Selecting the parent **Snippet** reports on all embedded **Variant** views and is essentially an **OR** between the **Variants**.
- Selecting a **Variant** reports on all embedded conversion links and is essentially an **OR** between the **Conversion Links**.

Examples**:**

- **Behavioral**: **Views**: All **Variants** of a particular **Snippet** (essentially an **OR** between the **Variants**)
- **Behavioral: Conversions**: All conversions of a particular **Variant** or **Snippet** (essentially an **OR** between all the **Conversion Links**)

- **WCO** also allows you to repeat the same **Variant**, as many times as you like within a **Snippet**. These identical **Variants** can be associated with any **Targeting Group**, allowing you to deliver the same content to different target audiences.

Question:
How do I pass custom parameters or values to a WCO Snippet for targeting purposes?

Answer:
WCO recognizes any custom parameters included in the **Snippet's** JavaScript call, and exposes these parameters for targeting purposes as **Form** field values.

This capability is extremely useful in instances where you need to pass user profile-specific attributes to **WCO** in real-time, or asset specific parameters to the **WCO Snippet**.

This data is not stored in WCO and will not impact your conversion counts.

Let's say for example, that we need to pass the label or the page that is delivering the **WCO Snippet**. To add this custom real-time attribute to **WCO**, add the following code to your **Output Template**.

```
<%= asset["wco_snippet"].Replace("\" ></script>", "?asset =” + asset.Label + “\"
></script>")%>
```

This code will produce the following output:

```
<script type="text/javascript" src="//snippet.omm.crownpeak.com/s/2c4764a1-b91d-
4d37-9aeb-eaabecfa2fc2?asset=Homepage" ></script>
```

The custom attribute will now be targetable in **WCO** as a **Form** field value.

Question:
How can I preview my optimized experiences in the CMS?
The CMS provides an intuitive interface directly within the authoring experience to preview your content variations for each of the **Targeting Groups** you've defined. While previewing and/or editing an asset, the **View** tab > **WCO Targeting** opens a **WCO** panel which lists all of the **Targeting Groups** used on the page. Clicking on any **Profile** (which is the same as a **Targeting Group**), will result in re-rending the page in real-time, reflecting what the targeted audience would see.

WCO TERMINOLOGY

- **Browser Cookie** (Information and behavior stored in a user's web browser that can later be used to personalize digital experiences.)
- **Browser Session** (Information about a web visitor's session (i.e., location, device type, time) based on IP address.)
- **Business Logic** (Using targeting rules to identify web visitors. When the rules are triggered, personalized content is then displayed.)
- **Collection** (Collections are a group of **Snippets**. Group **Snippets** for targeting purposes, or to funnel a web visitor to a specific item, such as a white paper.)
- **Persona** (A semi-fictional representation of a type of buyer or customer that helps companies better understand and communicate to their audiences. Personas are useful in crafting marketing messages, campaigns and digital marketing experiences tailored to a specific audience segment.)
- **Snippe**t (A **Snippet** is a piece of code which is used by **WCO**. The **Snippet** is the backbone to creating a testing/targeting piece on your webpage. Within a **Snippet** you can:
- Insert a **Form**,
- Insert a **Conversion Link**,
- Target your content to offer slightly different content based on information, such as the web visitor's location,
- Change the text or image based off a **Testing Variant**.)
- **Targeting Group** (**Targeting Groups** describe which visitors can see your content, based on a set of **Targeting Rules** or conditions that you specify and whether or not they match these conditions.)
- **Targeting Rules** (Targeting Rules fall into the following categories:
- **Ambient** (Data or attributes that are readily available for all visitors including anonymous visitors)
- **Source** (This data describes how the visitor arrived at your site.)
- **Demographic** (This data shows what is known about the user from their web connection.)
- **Behavioral** (This data describes the visitor's interactions and engagement level on your site by tracking page views, and conversions.)
- **Form** (This data is collected from any form on your site.)
- **Integration** (This data is retrieved from your backend system, or any 3rd party system via **WCO's** connectors.))
- **Variant** (Each **Variant** defines a test or target associated with a given **Snippet**. After creating a **Snippet**, authors select the variant type, whether testing or targeting. Multiple variants of the same type can be added to a **Snippet**. **Content Variant** refers to a specific set of text or images that are displayed for each **Target Group**.)

GENERAL INFORMATION ABOUT COOKIES STORED BY WCO
The following contains a listing and general information about cookies stored by WCO.

- Cookie Name: *a*
- **Cookie Domain**: **snippet.omm.crownpeak.com**
- The *a* cookie keeps track of IP address recorded for this client's OmmAnonId.
- **Cookie Name**: *OmmAnonId*
- **Cookie Domain**: .**omm.crownpeak.com**
- The *OmmAnonId* is a GUID used as the key to the user's identity
- **Cookie Name**: *ASP.NET_SessionId*
- **Cookie Domain**: **snippet.omm.crownpeak.com**
- The *ASP.NET_SessionId* is the session cookie used by **WCO**.
- **Cookie Name**: OmmValues80112474-504a-4bcb-9f86-e212c0b0039a
- **Cookie Domain**: **.omm.crownpeak.com**
- The *OmmValues(key)* is a unique identifier to the specific **Snippet** to which the cookie is related.

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WHAT IS DQM?
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**.

DQM Capabilities

CMS 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:

- View a consolidated analysis of error classifications on *all* your web pages from a central dashboard, with links to make corrections on the fly.
- Ensure Web Content 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.
- 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.
- Detect and track 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[11].

What is WCAG?

The word 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 form 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.

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:
<img src="my_image.png" alt="my image description" title="image tooltip">The **alt** text (**alt="**) should describe the image and its purpose.

[11] 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.

Images without **alt** tags are highlighted as checkpoints for a few important reasons. In fact, you cannot save changes to your page without an **alt** tag for all of your images.

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: <img src="my_image.png" alt="">, 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.

The Priority Flag

Issues with priorities are flagged as displayed below.

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.

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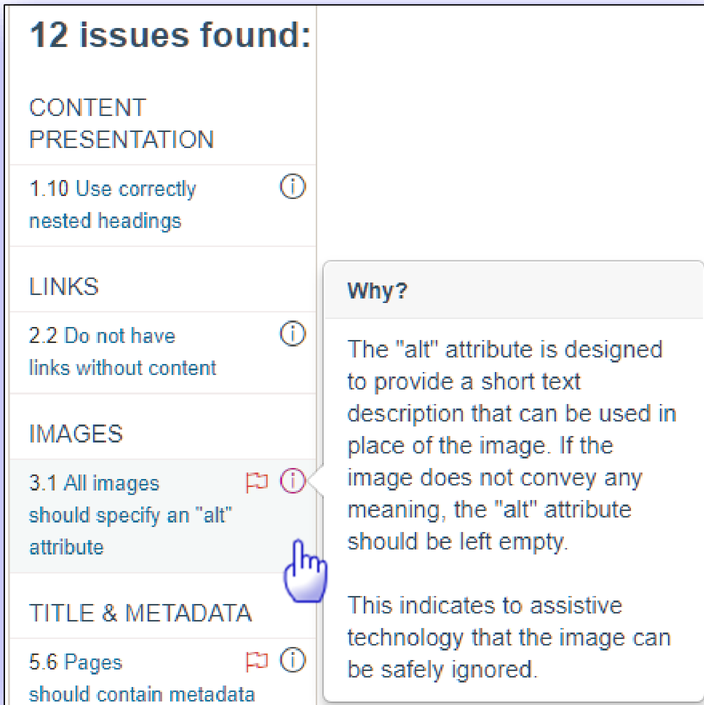
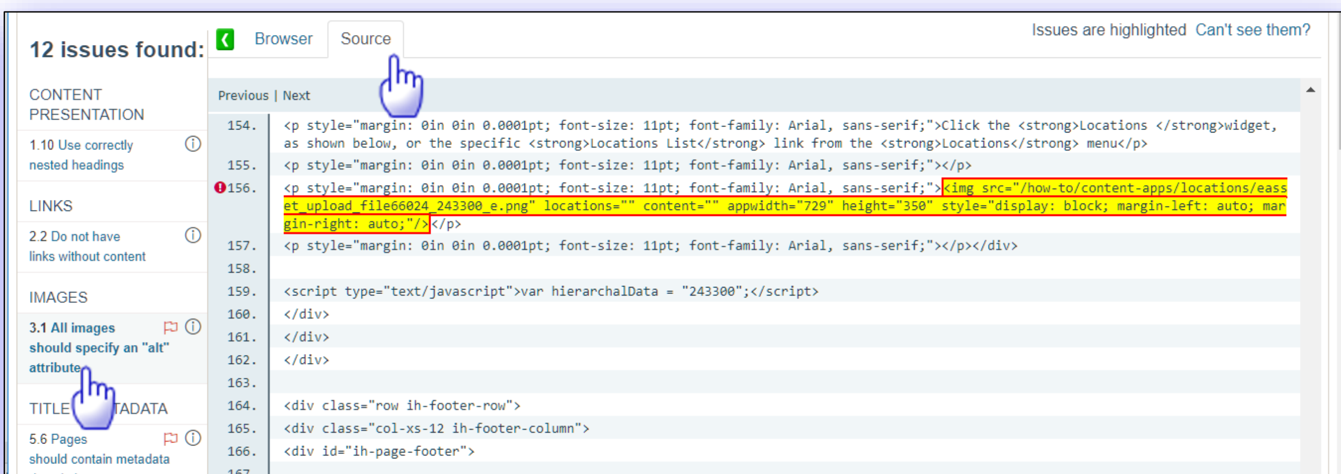




HOW DOES THE DQM PLATFORM WORK?

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 can be adjusted to requirements. 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 website 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.

How Does the Influence Health CrownPeak Digital Quality Management (DQM) Platform Work?

ACCESSING THE DQM PANEL
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**.

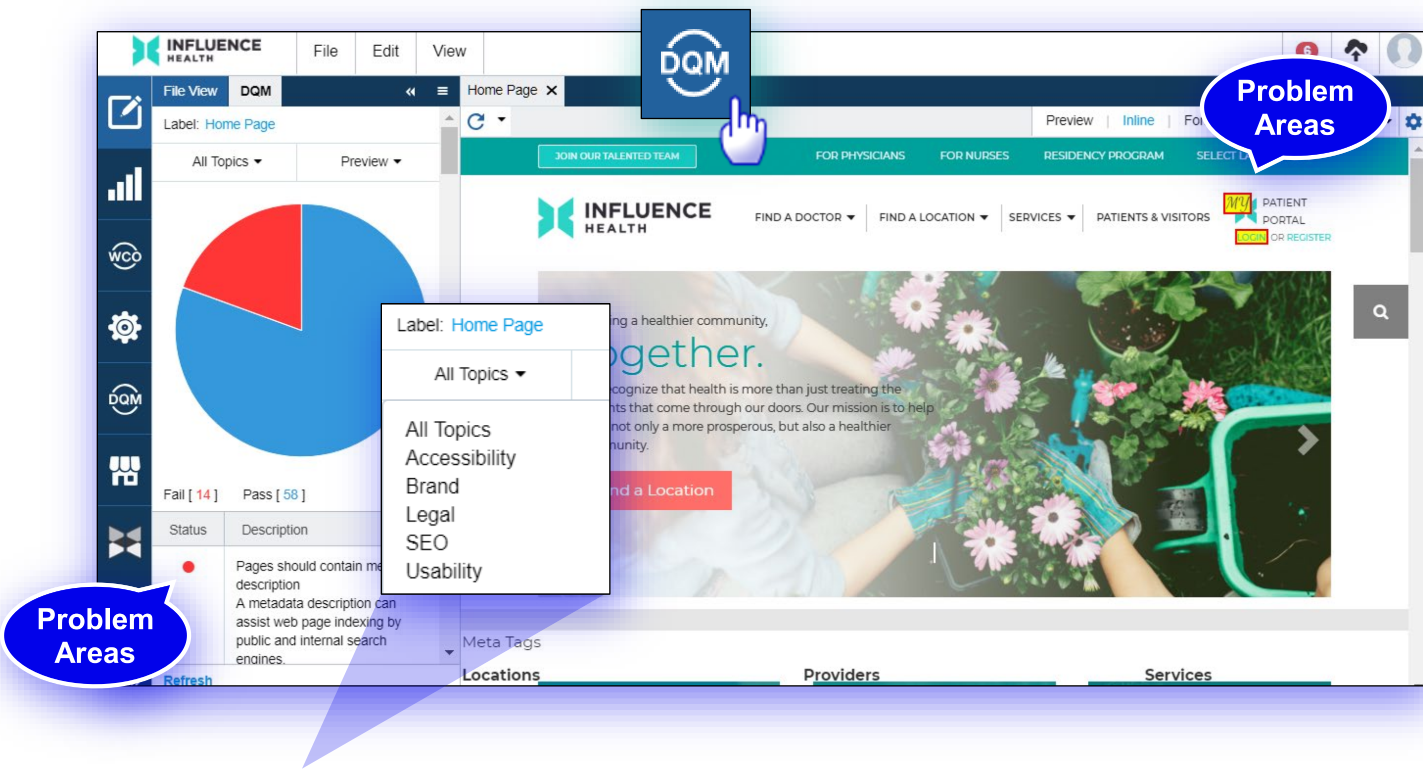
The pie chart shows your **Pass/Fail** statistics visually and in percentages. The blue area and coordinating blue bullets below it, indicate compliant (**Pass**) items. The red chart percentage and bullets are your problem (**Fail**) areas. Use the drop-down menu to view **Pass/Fail** information by 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**.

- 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.



-

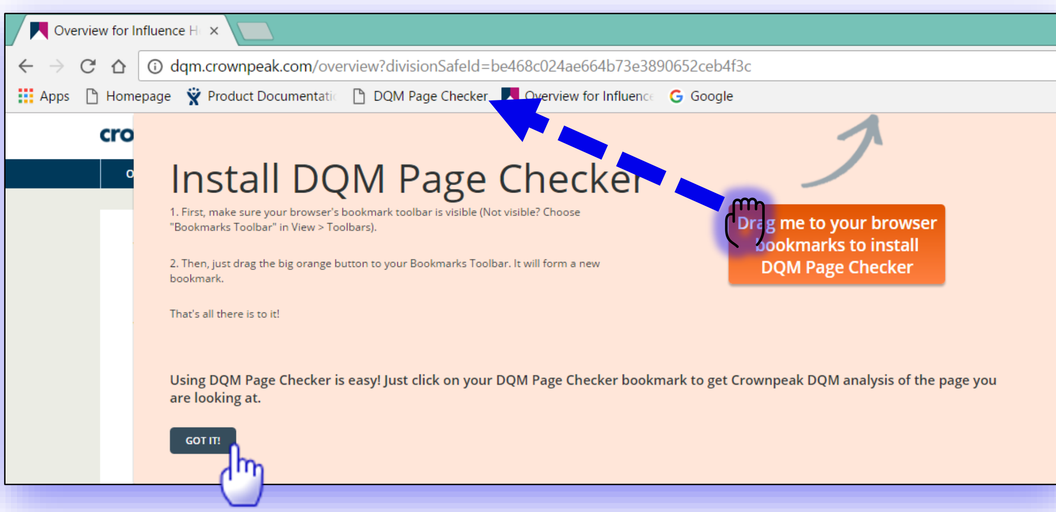
INSTALLING THE DQM PAGE CHECKER IN CHROME

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.

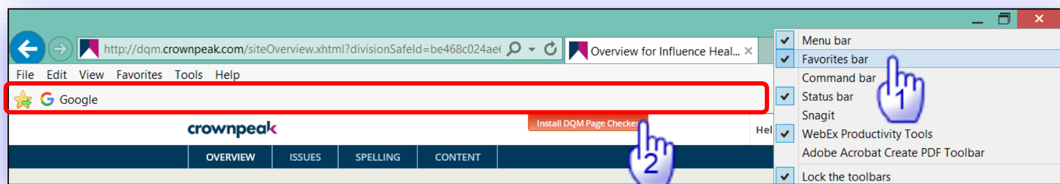


INSTALLING PAGE CHECKER IN IE11

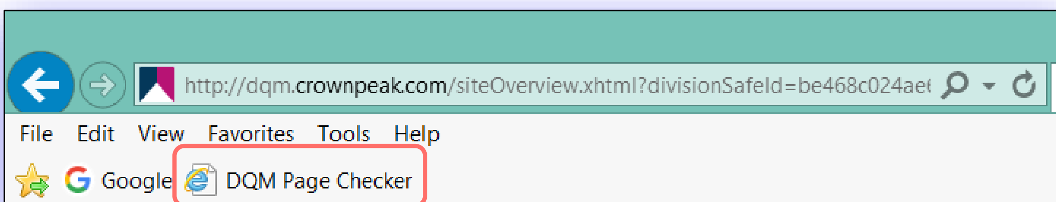
Installing the **DQM Page Checker** in IE11 involves the same steps, with one exception.

You must first display the IE11 **Favorites** bar, by if you have not already, by 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.

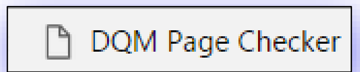


This is the **DQM Page Checker installed** in IE11. Go to a site and click it for an instant evaluation, based on the currently configured rules in place.



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 site listed, and highlighted as demonstrated on our demo site, for whichever issue you click.

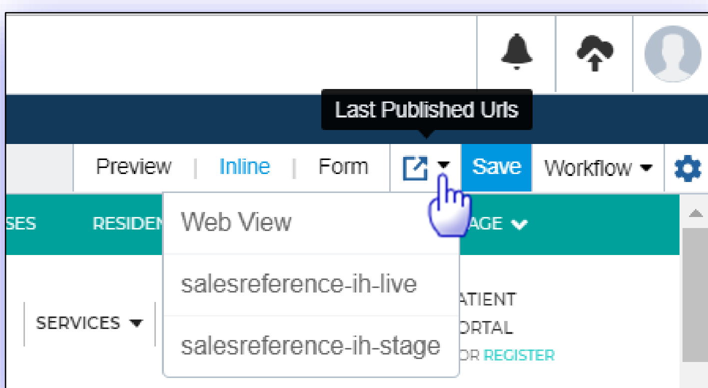


You can check any site to compare how your site rates against competitors, without having access to the CMS.

Assists your site editors in both pre and post publication mode.

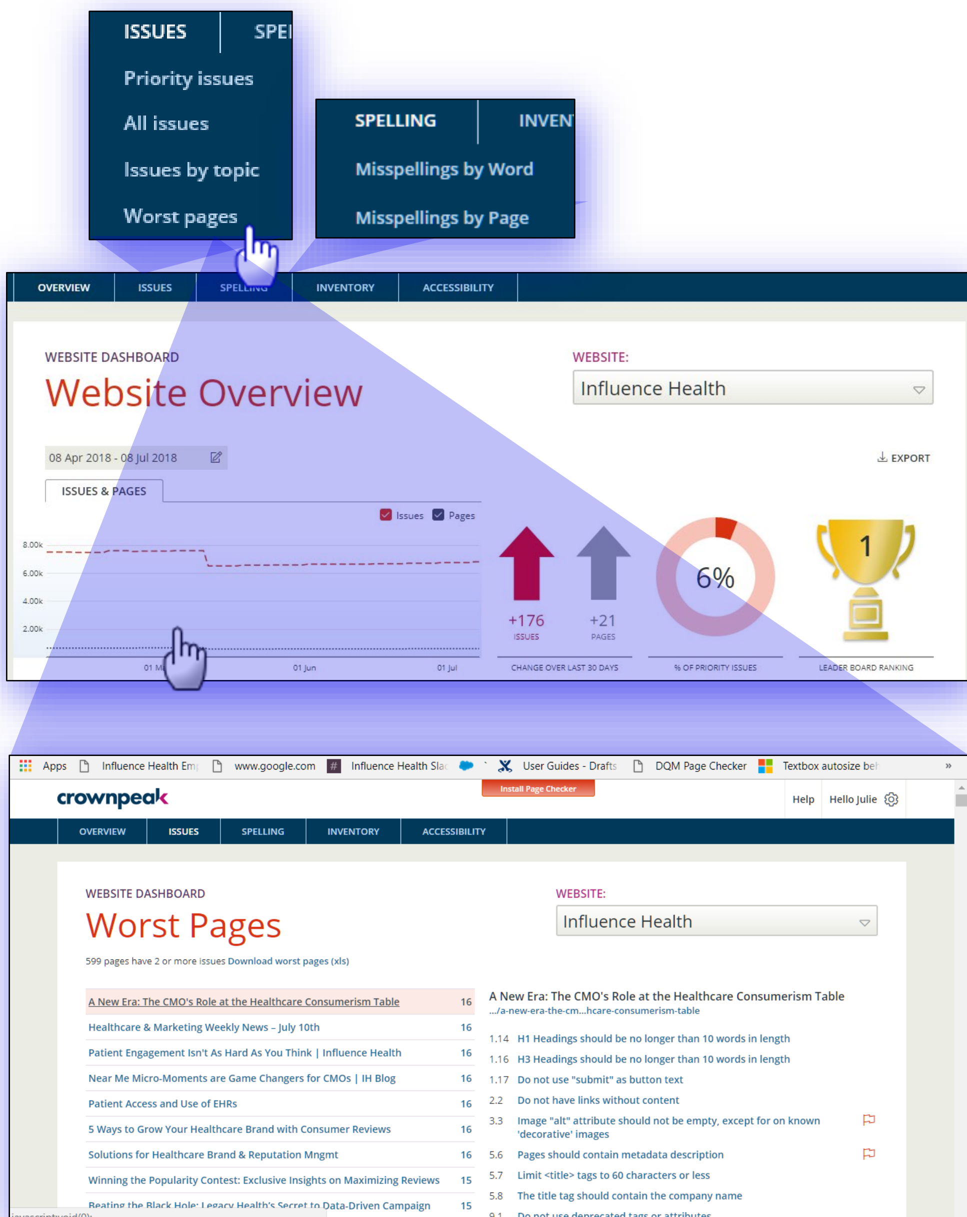
VIEWING A SINGLE PAGE IN THE DQM DASHBOARD FROM THE CMS AUTHORING ENVIRONMENT

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**. For an example, see **Where Can I Find Help Understanding a Checkpoint?** under **Accessibility in DQM, Definitions**.



ANOTHER POINT OF VIEW, THE WEBSITE DASHBOARD OVERVIEW

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
Content	All pages should contain headings.
Content	All pages should contain an <h1> heading.
Content	Do not use underlining to highlight text.
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.

Category	Rule
Content	Do not overuse uppercase formatting.
Links	Do not use meaningless phrases such as "click here" or "more" as 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.
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.

Category	Rule
Rich Media	Include information about document size within or next to the link.
Title and Metadata	Does the page contain a title tag?
Title and Metadata	Is the title tag populated?
Title and Metadata	Does the title tag contain more than one word?
Title and Metadata	Pages should specify the natural language of a document.
Title and Metadata	Do not use meta refresh with a time limit.
Title and Metadata	Pages should contain metadata description.
Title and Metadata	Limit <title> tags to 60 characters or less.
Title and Metadata	The title tag should contain the company name.
Title 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.
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.

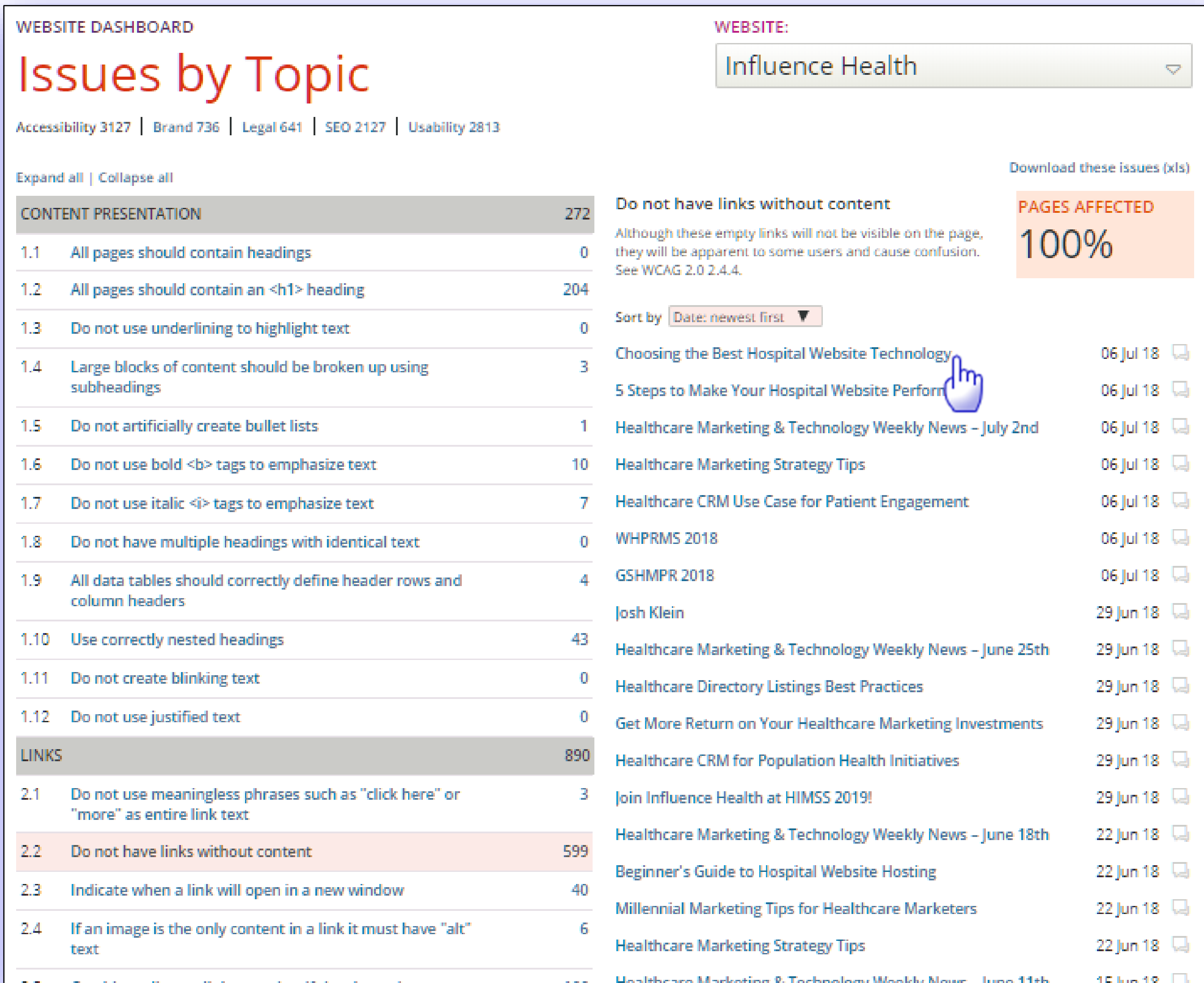
Category	Rule
URL Structure and Code	ID values must be unique.
URL Structure and Code	Do not use "onmouseout" without "onblur".
URL Structure and Code	Do not use "onmouseup" without "onkeyup".
URL Structure and Code	Do not use "onmouseover" without "onfocus".
URL Structure and Code	Do not use "onmousedown" 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.

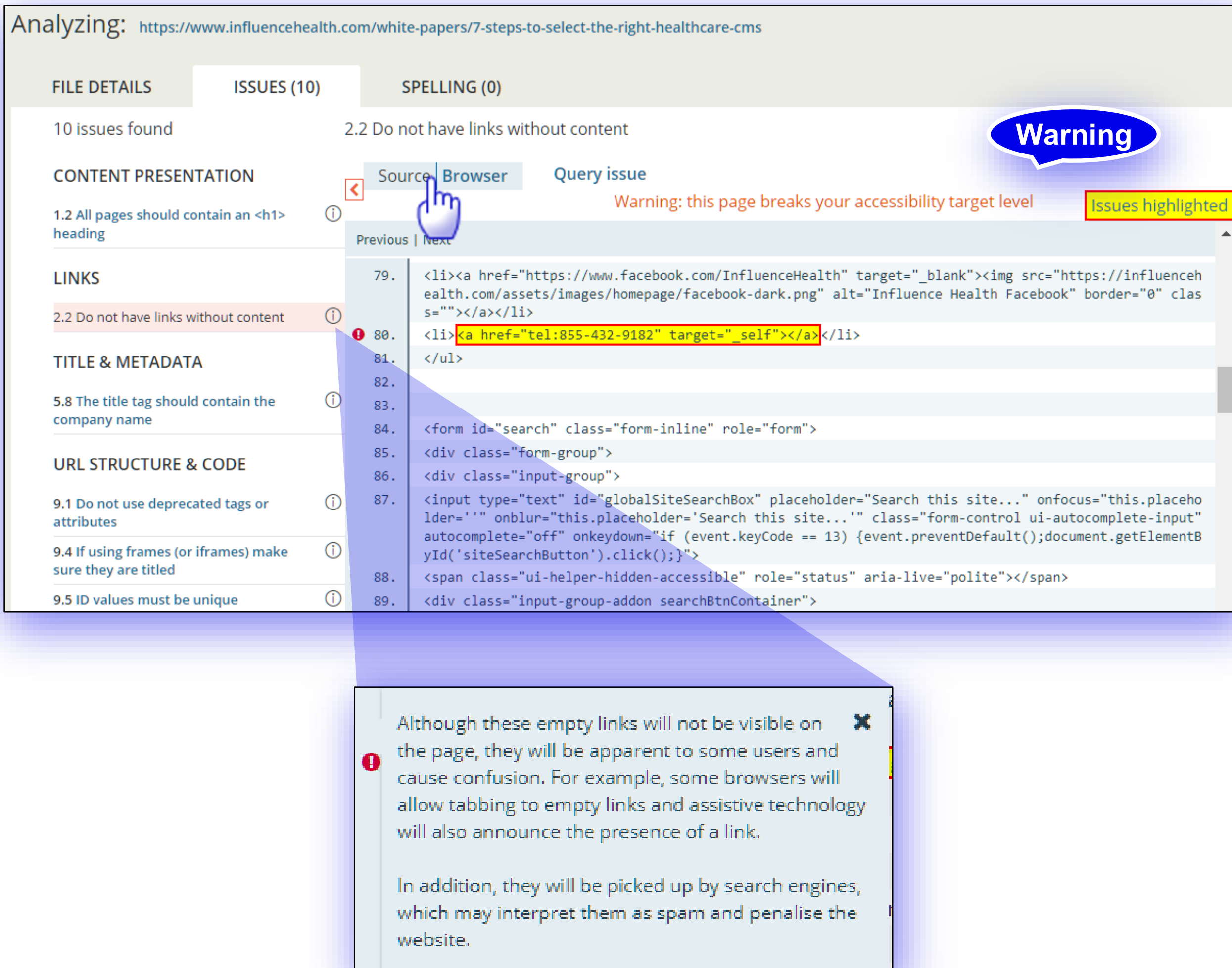
Category	Rule
Privacy and Cookies	Do not disable or suppress the ability to zoom.
Mobile	Do not use nested tables.
Mobile	All pages should have a link to the desktop version of the site.
Mobile	Do not use the title attribute unless on a form input.

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.




Analyzing: https://www.influencehealth.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
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
Source
Browser
Query issue
Warning: this page breaks your accessibility target level
Issues highlighted
Previous | Next
79. <img src="https://influencehealth.com/assets/images/homepage/facebook-dark.png" alt="Influence Health Facebook" border="0" class="">
80.
81.
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.placeholder=''" 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.
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 penalise the website.

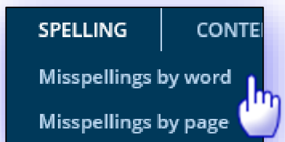
Click the Information icon ⓘ to view why resolving links without content is important. The text states:

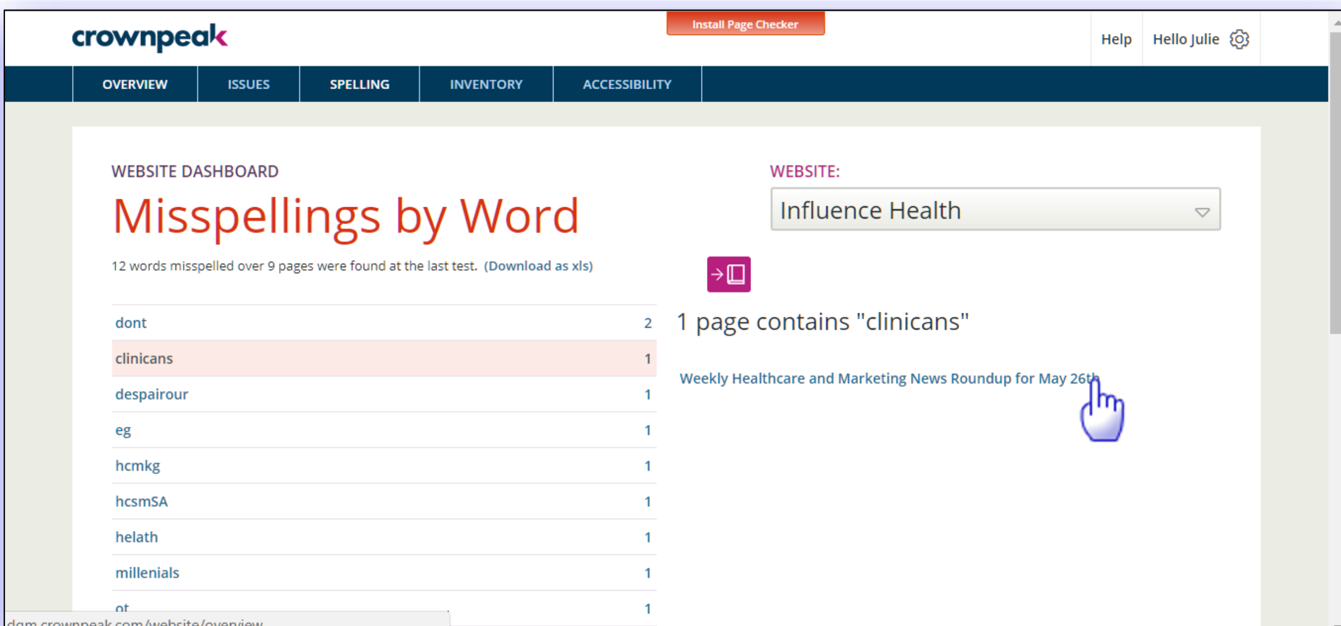
Although these empty links will not be visible on the page, they will be apparent to some users and cause confusion. For example, some browsers will allow tabbing to empty links and assistive technology will also announce the presence of a link.

In addition, links without content will be picked up by search engines, which may interpret them as spam and penalise 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.





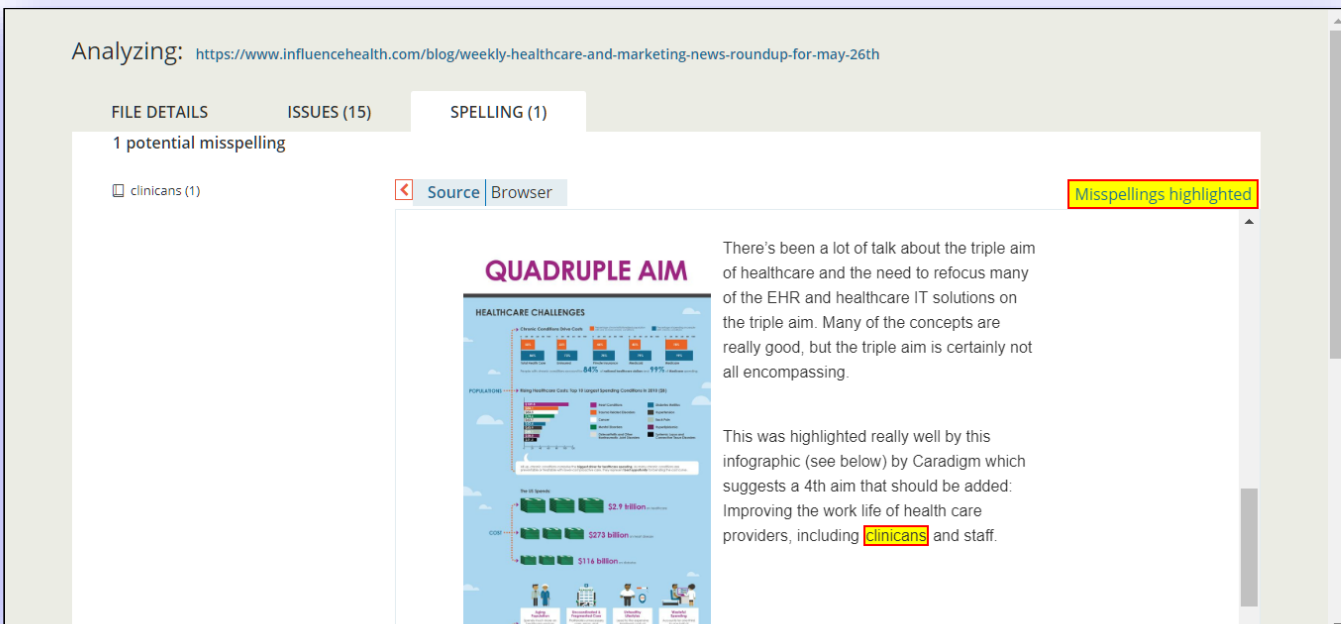
In the **Browser** tab view, once the page launches, you can use the standard <Ctrl+F> keyboard command to search the misspelled word on the page.

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

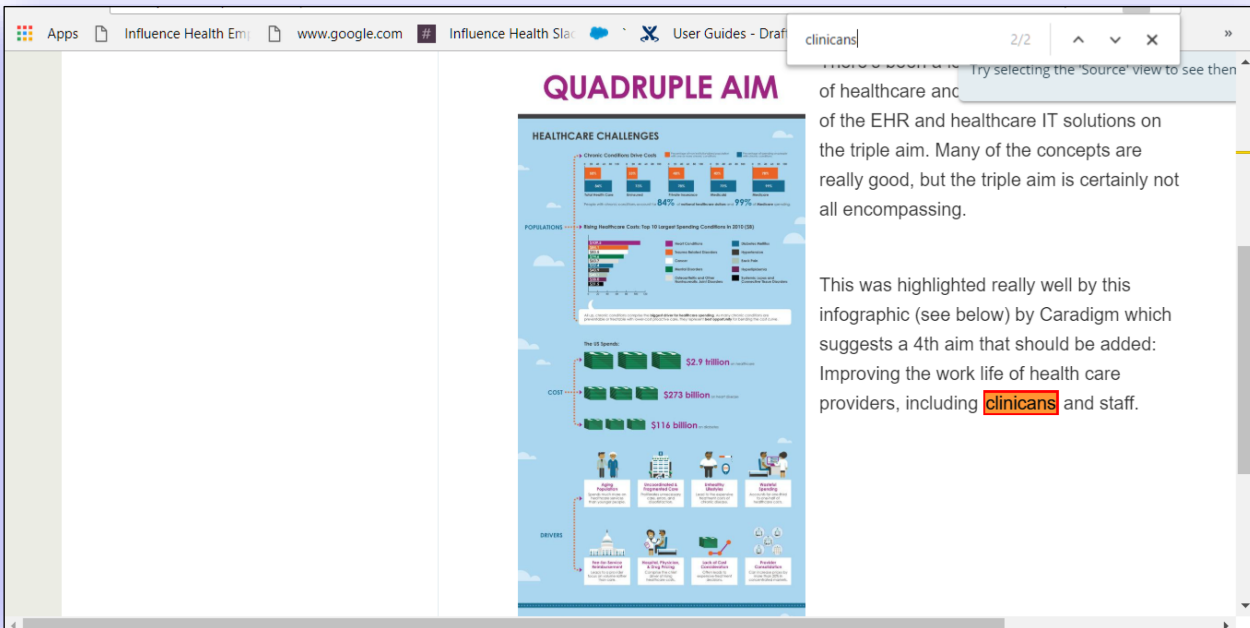
Try selecting the **Source** (code) view to see them all.



;

healthgrades™

Using the search function



Taking Inventory

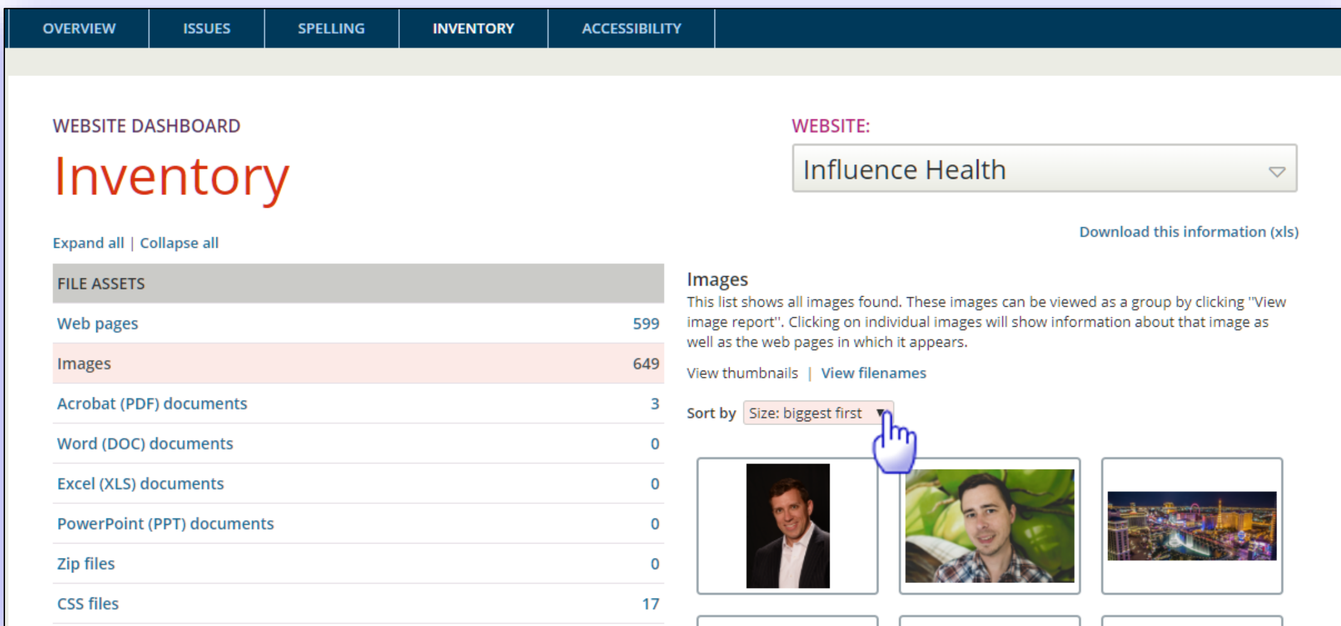
The **Inventory** tab, as its name implies, lists all the assets of your website by category. Each asset type, such as **Images**, displays the count of that type of asset and is an active link that provides the pages of occurrence and their links.

File Assets are listed by: Images, Acrobat (Pdf) Documents, Word (Doc) Documents, Excel (xls) Documents, PowerPoint (ppt) Documents, Zip Files, CSS Files, All Flash Files, WMV Files, Flv Files, Mp3 Files, Mp4 Files, 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

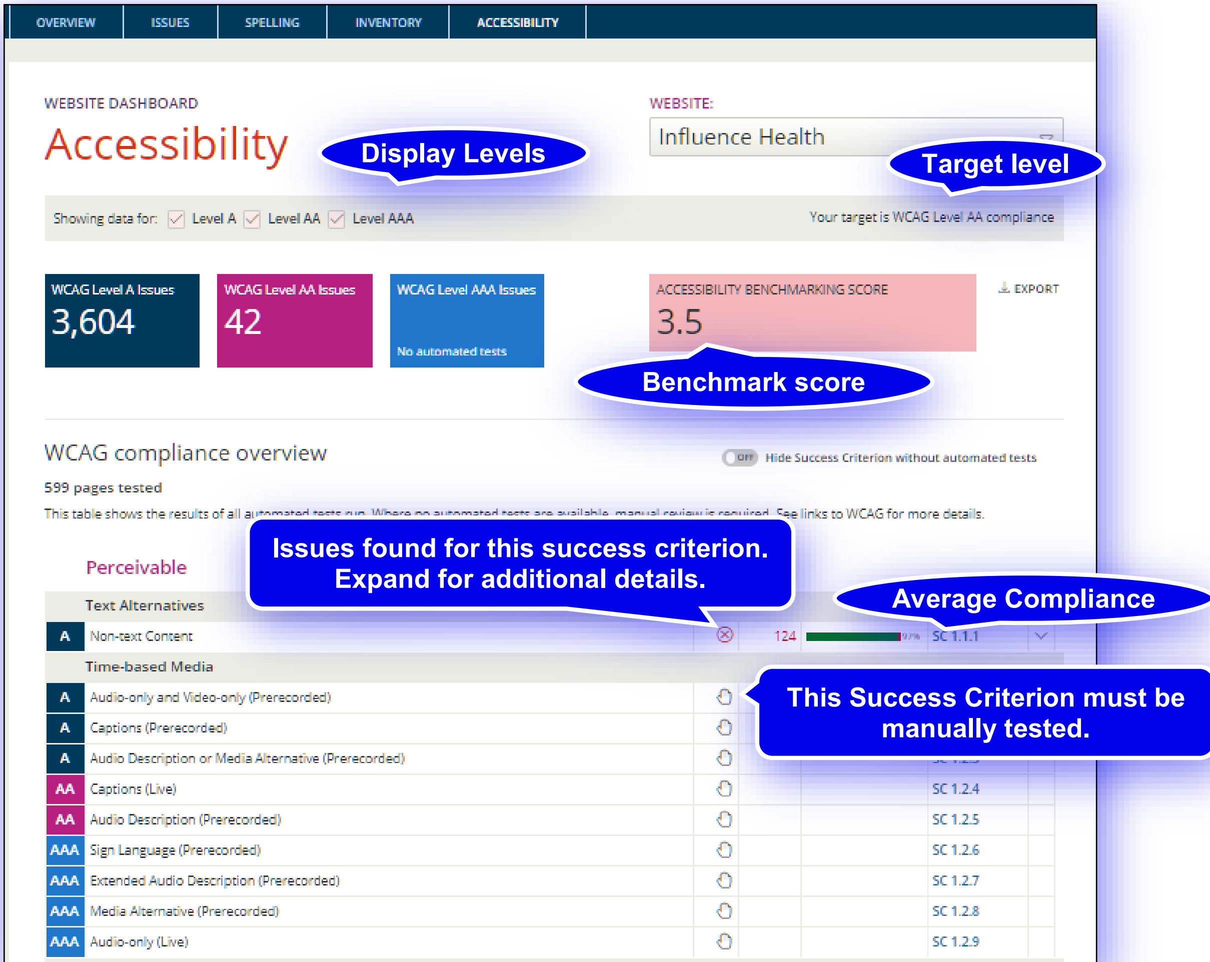


that set cookies, JavaScript files setting cookies, Persistent cookies by type, Pages using HTML5 local storage code, Pages using HTML5 session storage code.

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.



OVERVIEW
ISSUES
SPELLING
INVENTORY
ACCESSIBILITY
WEBSITE DASHBOARD
Accessibility
Display Levels
WEBSITE:
Influence Health
Target level
Showing data for: Level A Level AA Level AAA
Your target is WCAG Level AA compliance
WCAG Level A Issues
3,604
WCAG Level AA Issues
42
WCAG Level AAA Issues
No automated tests
ACCESSIBILITY BENCHMARKING SCORE
3.5
EXPORT
Benchmark score
WCAG compliance overview
Hide Success Criterion without automated tests
599 pages tested
This table shows the results of all automated tests run. Where no automated tests are available, manual review is required. See links to WCAG for more details.
Issues found for this success criterion. Expand for additional details.
Perceivable
Average Compliance
Text Alternatives
A Non-text Content 124 SC 1.1.1
Time-based Media
A Audio-only and Video-only (Prerecorded)
A Captions (Prerecorded)
A Audio Description or Media Alternative (Prerecorded)
This Success Criterion must be manually tested.
AA Captions (Live) SC 1.2.4
AA Audio Description (Prerecorded) SC 1.2.5
AAA Sign Language (Prerecorded) SC 1.2.6
AAA Extended Audio Description (Prerecorded) SC 1.2.7
AAA Media Alternative (Prerecorded) SC 1.2.8
AAA Audio-only (Live) SC 1.2.9

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	Is 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 fulfil 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 represnetative, 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. For more detail, please see **Reducing Errors Reported in Website DQM Reports**.

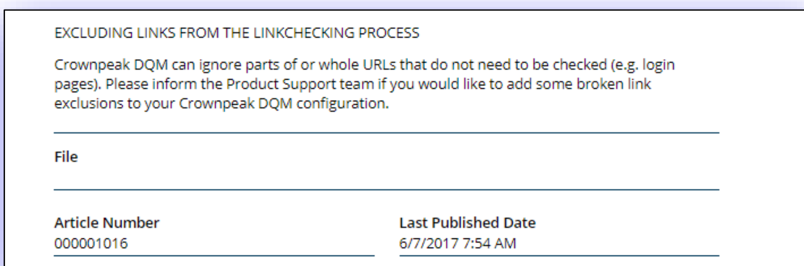
REDUCING ERRORS REPORTED IN WEBSITE DQM REPORTS

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.


EXCLUDING LINKS FROM THE LINKCHECKING PROCESS

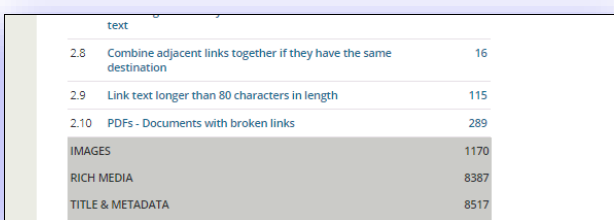
Crownpeak DQM can ignore parts of or whole URLs that do not need to be checked (e.g. login pages). Please inform the Product Support team if you would like to add some broken link exclusions to your Crownpeak DQM configuration.

File

Article Number	Last Published Date
000001016	6/7/2017 7:54 AM

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 documents.

Alternately, the **2.10 PDFs – Documents with broken links** checkpoint can be suppressed completely on client request.



	text	
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 be 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

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	PRODUCTID
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

PRODUCT NAME INCLUDED WITH ADAM SE PRODUCTID=127	PRODUCTID
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 3rd 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 for <!-- --> comments as well.
> Example, there are places in the page source similar to the following:

```
<!---<div class="cta-overlay"><img class="img-responsive"
src="/assets/images/banners/fpo.jpg" />
<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>--->
```

Images from cross-site origin or external sources

One client was using forms which included buttons and images from an external source. You can ask to exclude scanning image tags 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:

```
<img
src="https://bbox.blackbaudhosting.com/webforms/images/ajax_loader_border2.gif"
alt="" style="vertical-align: middle;"/>
```

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 120 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

MANAGING YOUR SEO
In this section, we will explain what SEO is, why it is important and how to target and resolve SEO issues.

Defining SEO

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

Who Manages the SEO?

Managing the SEO typically falls to the Power User, who also creates or modifies **Page** and **Content App** layouts, page content and site-level settings such as **Site Configuration**.

SEO Keywords

There are many SEO strategies site managers use to encourage search engines to rank their pages over competitors, including Pay Per Click (PPC) advertising campaigns. Organic[12] ranking can assist your website getting placed in the top 10 search results for your targeted keywords.

SEO keywords are actually *phrases* that describe your services. These keywords are placed in the <TITLE> as well as <BODY> tags of your page, so that search engines can find them.

Strategically selected, unique two to three-word keywords have the best chance of higher ranking in search results and return the highest quality traffic. You want a keyword phrase that is specific enough to direct your targeted audience (*those most likely to purchase services*) to your site, but that contains words visitors who are searching for your service are *most likely to use*.

Think of how you search, <u>not</u> how you advertise.

[12] Organic search results are returned due to their relevance to search terms, whereas non-organic search results can include Pay-Per-Click advertising.

Keyword Syntax

One example of keyword syntax: (single or multi-words that describe) adjective service location, or location adjective service

- Enter the username (typically your email address) that is associated with your account. An email will be sent to
- **Adjective** describing your service (narrows the search, results in a higher ranking when that term is used in a search, in combination with the remainder of the phrase),
- **Your Service** (broadens the search, results in a lower ranking when used alone),
- **Your Location** (narrows the search, results in a higher ranking when that term is used in a search, in combination with the remainder of the phrase).

Example keywords:

- laser back surgery birmingham al
- birmingham al laser back surgery

Enter the CODX V3 DQM

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**.

CODX 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.

Other DQM Capabilities

- View a consolidated analysis of error classifications on all your web pages from a central dashboard, with links to make corrections on the fly.
- Ensure Web Content Guidelines (WCAG) 1.0 and 2.0 and Section 508 accessibility standards-compliant content.
- Easily correct details such as broken links, orphaned pages, readability and multi-lingual misspellings, which can have a strong impact on public perception.
- 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.
- Protect your brand with reporting for brand violations such as usage of correct logo, color palette, font, punctuation, image assets, consistent use of terminology, language clarity, prohibited terms, etc., across all digital experiences.

- Detect and track key digital assets across all of your sites, making it easy to review and replace files.

Browser Support

CODX 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/

INSTALLING THE DQM PAGE CHECKER

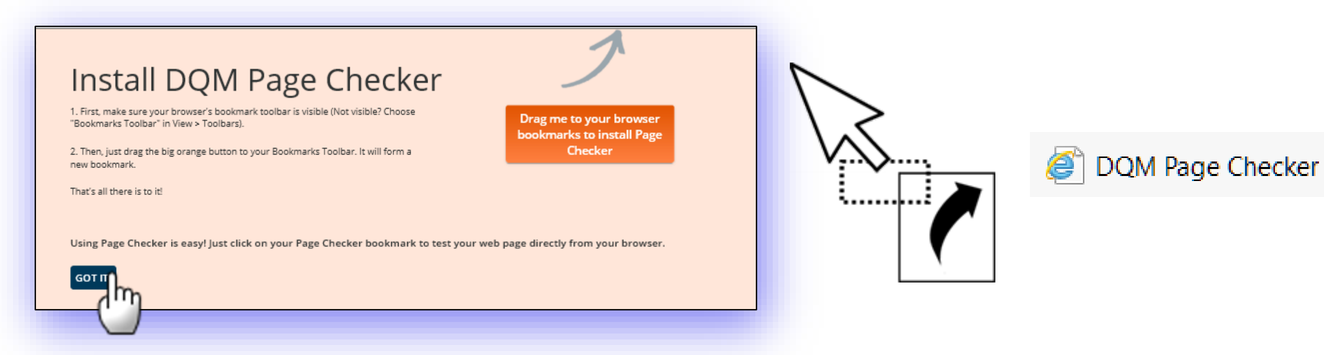
When you receive your login for your CMS Crownpeak DQM user account and log in to the platform, you will notice an orange button at the top-center of the **Website Dashboard Overview** page. Installation is simple. Click the Install DQM Page Checker button.

If IE is your current browser, make sure your **Favorites** bar is displaying. In Chrome or Firefox, enable **Bookmarks**.

Note:

If you are on Windows 10, using Microsoft Edge and wish to use IE11, simply switch to IE as your default browser.

The instruction screen displays. Drag the orange box to the browser **Favorites** or **Bookmarks** bar. You will see an arrow 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.



Using the DQM Page Checker

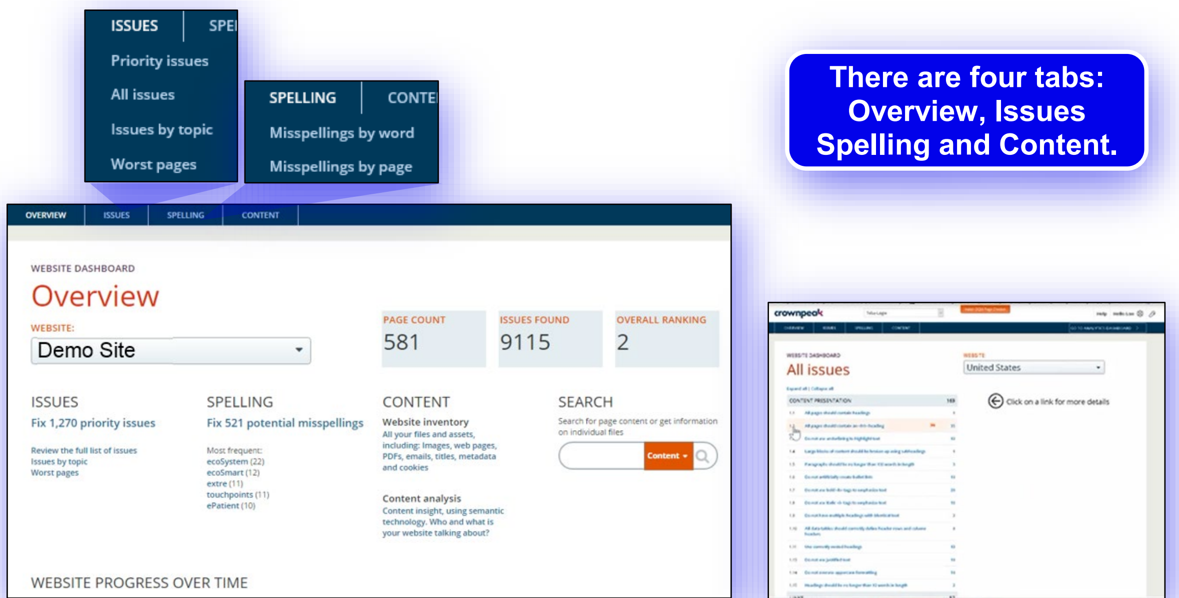
Once the **DQM Page Checker** is installed, you can go to any site and click it for an instantaneous evaluation, based on the currently configured rules in place.

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.
- Protect your brand with reporting for brand violations such as usage of correct logo, color palette, font, punctuation, image assets, consistent use of terminology, language clarity, prohibited terms, etc., across all digital experiences.
- Detect and track key digital assets across all of your sites, making it easy to review and replace files.

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

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.

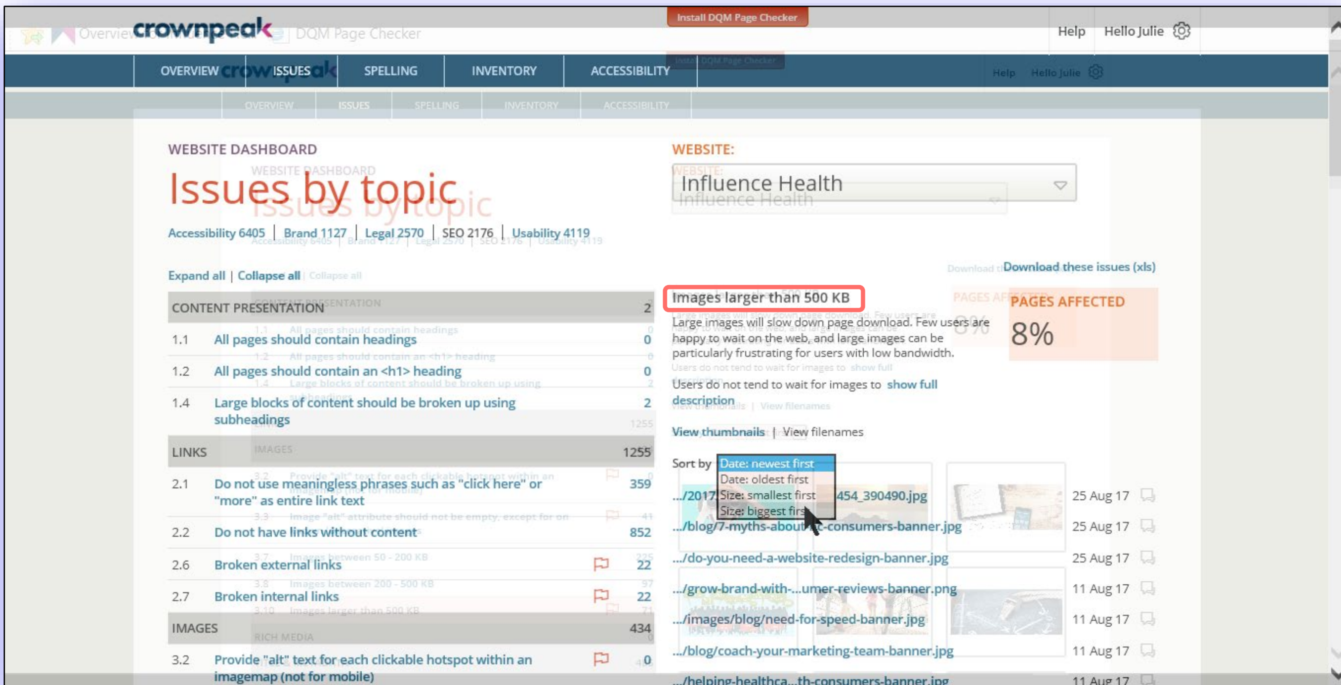
Expand a category to immediately address those issues, in context from the **Overview** page. Let's look at one of the major issues that directly affects not only your site's ranking but user experience and response, **Page Load Performance**. You can speed up page loading time by optimizing your images, 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.

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.



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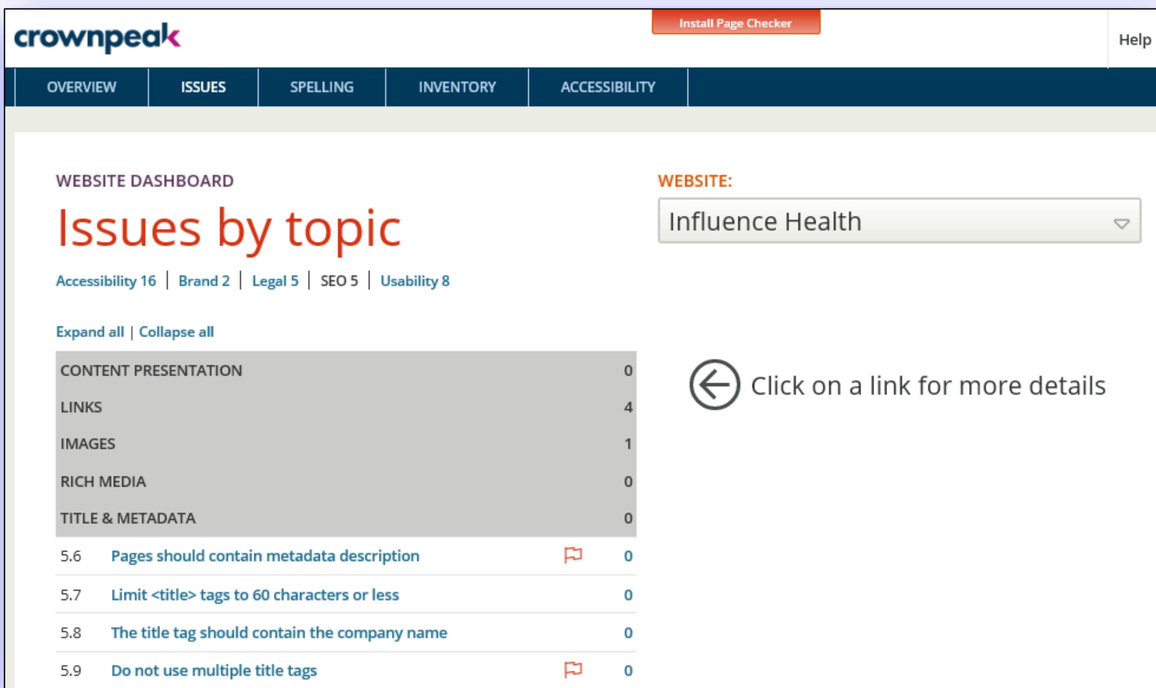
Address Metadata Keywords by Page

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

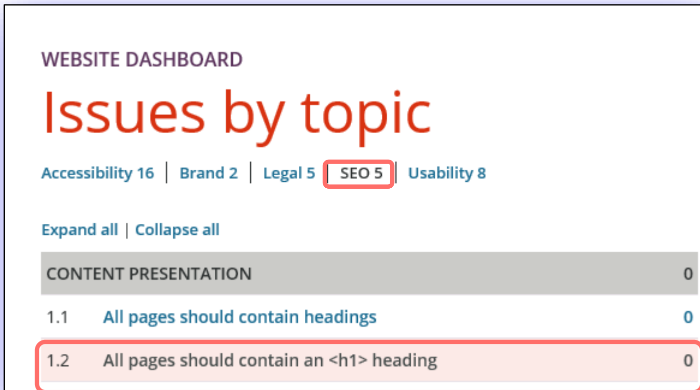
Title Tag

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.

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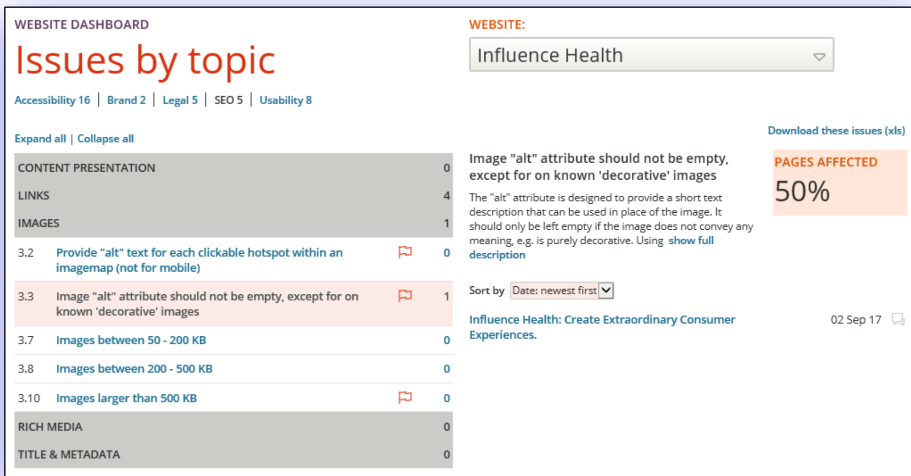
Alt Tags

Each image on your site should have an **Alt Tag**.[13] **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**.



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** display in page URLs and using keywords here can really help your rankings. Optimize those URLs using the **LINKS** category under **Issues by Topic** > **SEO**.

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[13] Alt tags, 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.

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 against the latest versions, as well as through an automated process and support both PC and Mac operating systems.

- Latest version of Chrome (Chrome 67)
- Internet Explorer 11.0
- Latest version of Safari

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.