

PERSONALIZATION

Personalization is a tool for restricting access to a page or section (multiple pages) of your site to only those users who are authorized. For example you may restrict access to your Human Resources pages or other pages with sensitive information.

It is best to personalize the section before adding your sensitive material.

You can restrict access to a single page, a section of your site (a group of many pages and child pages) or to your entire site. When personalization is activated on a portion or your entire site, visitors to your site must have a valid user id and password to view the restricted areas.

OVERVIEW

There are several components involved in personalizing a section of your site. The parts can be done in any order. Create a group, a user account and a landing page with personalization applied. All pages created from this page will not be accessible without logging in.

RESTRICTED SECTION: This will consist of either a single page you want to restrict access to or, more likely, it will be the parent page of a whole section you wish to restrict access to. For example, you may have a parent page for the Human Resources department and any number of child pages and grandchild pages, etc. in a typical page hierarchy.

LOGIN PAGE: You will need to create a login page that users will use to log into the restricted portion of the site. The login page can be placed anywhere - you can create it as a child of your Home page. The critical part with the Login page is that you must set the Post Login Page to be the entrance page of the restricted section. So you might use the Login page to log into the parent Human Resources page. You will require a separate login page for each area of your site that will be restricted.

APPLICATION FORM (optional): If you are going to allow users to apply for access to the restricted portion of the site, you will need to create an application form. You may or may not need this. If you want public users to be able to log in - say to a calendar of events, a blog, or an RFP (request for proposal) page type, you will need an application form. **If you are going to only allow specific set of people or to have access, you can control this from within the User Manager of the ACM without the necessity of the application form by creating user accounts or a shared single user account.**

You can decide how many different application forms you will need on your site. You can use the same application form for different restricted areas as long as the information you are collecting on the form is the same. When you create your login page, you specify which application form is to be used when people don't have an account and wish to apply for one.

AUTHORIZED USER GROUPS: You will need to create the groups of users who will be authorized to log into the secure sections of your site. You will also need to make sure that all of the right people have been added to the group.

APPLICATION FORM (optional):: You can create a group that is permitted access to the page or section, and then on the Application Form, you can indicate that users should be added to this group automatically once they have been approved. Thus the minute they are approved they will belong to the correct group and be able to access the restricted pages. The name you give to the group should indicate that the group is for accessing the restricted area. **Example** finance viewers (use the page title and the word viewers)

PERSONALIZING PAGES

For example, you may have a link to your Finance department on your site. The Finance parent page would require that users log in and once they do, they would gain access to the Finance parent page and its child pages.

1. Create a new page with only the Page Title and Url title and publish the page. Copy the address of the page for testing later.
1. Edit the page you wish to personalize. This will usually be the parent page of an entire section that you wish to isolate and require logins for.
2. Click on the Personalization tab. If the tab is not displayed, see your site administrator.
Note: Only authorized users (site manager group) can set personalization settings.
3. Check the setting "Personalize Content "
4. Sample

Personalize Content:	<input checked="" type="checkbox"/>
Use Parent Members:	<input type="checkbox"/>
<u>ROLE</u> MEMBERS	
Viewer(s):	

5. If your users and groups have been created, click the link 'viewers' to select the group that will be permitted to access the area. Don't forget to add the Site Manager group, You can proceed to the next step (6) if the group and users are not ready and complete this section later.
6. Click Publish.

TESTING

1. Once your page is personalized and the groups are applied, log out and close the browser.
2. Go to the secure page address. You should be sent to the login page. If not, the page is not secure and you need to reviewer contact the support team.
3. Log in using the user account that you created for your viewer group. The system will auto direct you to the page you requested. Testing is complete and you can now proceed to add your content.