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Administrator (Global)

You must have global administrator permission to add, remove, or edit site settings, pages/tabs, users or roles. If you do not see the Admin tab, you do not have necessary permission.

To add, remove, or edit site settings, pages/tabs, users or roles, click on the Admin tab. This page is divided into four sections.

Site Settings

1. In the **Site Title** text box, type the title of your portal.
2. In the **Description** text box, add a description of your portal. The description is a meta tag that is used to index and useful for search engines.
3. In the **Keywords** text box, you can add keywords (meta tags) that can be used to index and useful for search engines.
4. In the **Template** drop-down list box, select a background for your portal.
5. If you want users to be able to sign up on your portal, check the appropriate boxes next to **User Registration**. None for not available, Private for approval by administrator, Public for without administrator approval, and Verified for email verification. Note: this feature is currently not available.
6. To add your own logo to your portal, in the **Logo File** text box, type the address of the file you want to link to.
7. If you want hierarchical main navigation (use of fly-downs), click the **Use Hierarchical Main Navigation** check box.
8. If you want an automatic client browser test, click the **Perform Automatic Client Browser Test** check box. This checks Browser version and whether or not cookies and JavaScript is on.
9. Click **Save**.

Pages/Tabs

The terms page and tab are used synonymously.

Add a page/tab

You can add a new page/tab by clicking **Add New Tab**. The Tab Name and Layout page opens.

1. In the **Tab Name** text box, type the name you want.
2. In the **Parent Tab** drop-down list box, select the pages/tabs you want assign as a parent.
3. In the **Tab Title** text box, type the title of the page/tab.
4. In the **Keywords** text box, you can add keywords that can be used to identify this page/tab during searches.
5. In the **Template** drop-down list box, select a background to your portal
6. In the **Icon** text box, type the address of the icon you want.
7. If you want the page/tab to be seen, click the **Visible** checkbox.
8. If you want the page/tab to be seen by mobile users, click the **Show to Mobile Users** checkbox
9. In the **Mobile Tab Name** text box, type the name you want.

Security

Setting the security for a page/tab is important. This allows you to control and specify viewing and editing permissions of a page/tab. Each authenticated portal user is assigned a unique role within the portal's domain. Unauthenticated users get allocated to default roles, in this case All Users. Each page/tab has three default roles, Administrators, All Users, and Authenticated Users. Additional roles may be added.

1. If you want to make the page/tab visible for a specific role, click the **Authorized Roles** checkbox next to the role you want to grant the right to view.
2. If you want to grant permission to change content of the page/tab, click the **Admin Roles** checkbox next to the role you want to grant the right to perform administrative tasks.
3. If you want the same page/tab permissions you have established to be used on child pages/tabs, click the **Propagate Security to Child Tabs** checkbox.

Add modules to a page/tab.

1. In the **Add Module** section, choose the module you want from the **Module Type** drop-down list box.
2. In the Module Name text box, type the name you want.
3. Click **Add to 'Organize Modules' Below**, Move Up ↑, Move Right →, Move Down ↓, Edit ✎, Delete ✕ next to each pane (Left Mini Pane, Content Pane, Right Mini Pane) to place the module in the location you want.
4. Repeat steps one, two and three for each module you want to add.
5. Click **Save**.

Edit pages/tabs

You can edit existing pages/tabs in the **Tabs** box.

To move or edit pages/tabs, click on the page/tab you want to change then;

1. Click Up ↑ to move the selected tab up in list.
2. Click Down ↓ to move the selected tab down in list
3. Click Left ← to move the selected tab up one hierarchical level
4. Click Right → to move the selected tab down one hierarchical level.
5. Click Edit ✎ to edit the selected tab's properties. The Tab Name and Layout page will appear. Make the changes you want, then click **Save**.
6. Click Delete ✕ to remove the selected tab.

Users

Use this section to manage and add registered users. Each authenticated portal user is assigned a unique role within the portal's domain. Unauthenticated users get allocated to default roles, in this case All Users. Each module has three default roles, Administrators, All Users, and Authenticated Users. Additional roles may be added.



Add a user

To add a new user, click [Add New User](#). The Manage User page opens.

1. In the **Email (or Windows domain name)** text box, type the email or domain name of the user you want to add.
2. In the **Password** text box, type a password.
3. Click [Apply Name and Password Changes](#).
4. Select the appropriate role from the list.
5. Click [Add user to this role](#).
6. Click [Save](#).

Change user data



You can edit or delete an existing user.

1. Select the user from the **Registered Users** drop-down list.
2. Click Edit  to edit user information.
3. Click Delete  to delete the user.

Roles

Each authenticated portal user is assigned a unique role within the portal's domain. Unauthenticated users get allocated to default roles, in this case All Users. Each module has three default roles, Administrators, All Users, and Authenticated Users. Additional roles may be added.

You can edit or delete an existing role. Use the icon next to the role you want to change.

1. Click Edit  to edit role information. Add new members or make the changes you want then click [Apply](#).
2. Click Delete  to delete the role.

You can add a role by clicking [Add New Role](#). A text box with New Role0 appears.

1. Select New Role0 then type the name of the new role.
2. Add more members to the role by clicking Members. The Role Membership page opens. Select the name from the drop-down list, then click [Add existing user to role](#).
3. Click Apply.

Announcements Module

This module renders a list of announcements. Each announcement includes a title, text and a read more link, and can be set to automatically expire after a particular date.


Add an announcement

You can add an announcement by clicking [Add New Announcement](#) in the Announcement module. The Announcement Details page opens.

1. In the **Title** text box, type the name of the announcement.
2. In the **Read more link** text box, type the address you want users of mobile devices to link to.

3. In the **Read more (Mobile)** text box, type the address you want users of mobile devices to link to.
4. In the **Description** Text Editor, you can add text and images to describe your announcement.
5. In the **Expires** text box, either type the date or click the **Calendar** to enter the date you want the announcement to expire.
6. Click **Save**.

Edit an announcement

You can edit an existing announcement by clicking Edit . The Announcement detail page will open.

1. Make the changes you want.
2. Click **Save**.

Contacts Module


The Contact Manager module renders contact information for a group of people, for example a project team, vendors, or customers. The Mobile version of this module also provides a Call link to phone a contact when the module is browsed from a wireless telephone.

Add a contact

You can add a contact by clicking **Add New Contact** in the Contact module. The Contact Details page opens.

1. In the **Name** text box, type the name of the contact.
2. In the **Role** text box, type the role of the contact.
3. In the **Email** text box, type the contact's email address.
4. In the **Contact1** and **Contact2** text boxes, type additional contact information.
5. Click **Save**.

Edit contact information

You can edit contact information by clicking Edit  to the left of item you want to change. The Contact Details page opens.

1. Make the changes you want.
2. Click **Save**.

Currency Exchange Module

The currency exchange module allows users to get instant exchange rates for any currency conversions in the world.

Convert Currency

You can efficiently convert currency using the Currency Exchange Module.

1. Select the currency you want in the **Convert From** list.
2. Select the currency you want in the **Convert To** list.
3. Type in a number in **Amount**.
4. Click **Convert**.
5. The amount will be calculated and displayed.

Discussion Module

The Discussions Module renders a group of message threads on a specific topic. Discussions includes a Read/Reply Message page, which allows authorized users to reply to existing messages or add a new message thread.

Add a discussion topic

You can add a discussion topic by clicking [Add New Thread](#) in the Discussion module. The Message Detail page opens.

1. In the **Title** text box, type the title you want.
2. In the **Body** Text Editor, you can add text and images to describe you views.
3. Click [Save](#).
4. Click [Back to discussion](#) to return to the Discussion module.

Reply to a discussion topic

You can reply to an existing discussion by clicking its title. The Message Detail page opens.

1. Click [Reply to this Message](#).
2. In the **Body** Text Editor, you can add text and images to describe you views.
3. Click [Save](#).
4. Click [Back to discussion](#) to return to the Discussion module.

Documents Module

This module renders a list of documents and files, including links for browsing or downloading. Documents includes an edit page, which allows authorized users to edit the information about the Documents (For example, a descriptive title) stored in the SQL database.

Add a document

Add a new document by clicking [Add New Document](#).

The Document Details page opens.

1. In the **Name** text box, type the title of the document.
2. In the **Category** text box, type the category to which the document belongs.
3. In the **URL to Browse** text box, type the address you want to link to.
4. Or you can select a document to add to the SQL database in the **Upload to Portal** box by clicking Browse.
5. Click [Save](#).

Edit a document

Edit an existing document by clicking Edit  next to the title of the document. The Document Details page opens.

1. In the **Name** text box, type the title of the document.
2. In the **Category** text box, type the category to which the document belongs.
3. In the **URL to Browse** text box, type the address you want to link to.
4. Or you can select a document to add to the SQL database in the **Upload to Portal** box by clicking Browse.
5. Click [Save](#).

Events Module

This module renders a list of upcoming events, including time and location. Individual events can be set to automatically expire from the list after a particular date.


Add an event

Add a new event by clicking [Add New Event](#). The Event Details page opens.

1. In the **Title** text box, type the name of the event.

2. In the **Description** Text Editor, you can add text and images to describe your event.
3. In the **Location** text box, type the location where the event will take place.
4. In the **Event Date** box, type the date or click the **Calendar** to select the date.
5. In the **Expires** text box, either type the date or click the **Calendar** to enter the date you want the event to automatically be removed from the module.
6. Click **Save**.

Update an event

You can edit or update an existing event by clicking Edit  next to the name of the event. The Event Details page opens. Make the changes you want then click **Save**.

FAQ (Frequently Asked Questions) Module

Frequently Asked Questions (FAQ) are easily managed in the FAQ module for dynamic interaction with categories. Questions can quickly be organized, reordered and selected as viewable or non-viewable. The module includes an edit page that allows authorized users to update the FAQs.

Add a FAQ category

You can add category by clicking **Add FAQ Category**. The Edit FAQ Category page opens.

1. In the **Name** text box, type the name of the category.
2. In the **Description** box, type a description of the category.
3. Click to put a checkmark in the **Visible** box if you want the category to be seen by roles are authorized to view this module. Permission to view or edit a module is determined by module settings.
4. Click **Save**.

Edit a FAQ category

Edit a FAQ Category by clicking Edit  next to the category name. The Edit FAQ Category page opens.


1. In the **Name** text box, type the name of the category.
2. In the **Description** box, type a description of the category.
3. Click to put a checkmark in the **Visible** box if you want the category to be seen by roles are authorized to view this module. Permission to view or edit a module is determined by module settings.
4. Click **Save**.

Add a FAQ

You can add a question by clicking **Add FAQ Entry** in the category where you want the question included. The Edit FAQ Entry page opens.

1. In the **Question** text box, type the question.
2. In the **Answer** text box, type the response.
3. You can change the category in the **Category** list.
4. Click **Save**.

Edit a FAQ

Edit a FAQ Entry by clicking Edit  next to the question. The Edit FAQ Entry page opens.

1. In the **Question** text box, type the question.

2. In the **Answer** text box, type the response.
3. You can change the category in the **Category** list.
4. Click **Save**.

View the answer to a FAQ

View the answer to a FAQ by clicking the title of the question.

Google Search Module

The Google module allows you to provide Google searches of your portal content.

Search your portal

You can look for information using the Google Search module.

1. In the text box, type in the word or name you are looking for.
2. If you want to limit the search to your portal, click the Search this web site only checkbox.
3. Click Search.

HTML Document Module

This module renders portal web site content in the form of HTML or text. The Html/Text module includes an edit page, which allows authorized users to add, edit, delete and modify the HTML or text snippets directly.

Edit a HTML document

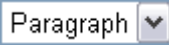
You can add or make changes to a HTML document by clicking **Edit**. The HTML Settings page opens.

1. In the **HTML Content** Text Editor, you can add text and images.
2. You can efficiently find and change multiple instances of a specific word or phrase. In the **Old Text** text box, type the word or phrase you want to find. In the **New Text** text box, type the new word or phrase. Click on local, then on Replace.
3. Click **Save**.


HTML Text Editor

Format a text using styles

You can apply a predefined set of formatting characteristics, a style, to your text.

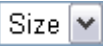
1. Select the text to which you want to apply the style.
2. On the toolbar, click the arrow next to Paragraph , then click a style name.

Change the font


1. Select the text you want to change.
2. On the toolbar, click the arrow next to Font , then click a font name.

Change the size of text


1. Select the text you want to change.

2. On the toolbar, click a click the arrow next to Font Size , then click a point size.

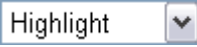
Set the text color

1. Select the text to which you want to apply the color.
2. On the toolbar, click the arrow next to Color , then click the color you want.


Set the text color

1. Select the text to which you want to apply the color.
2. On the toolbar, click Font Fore Color .
3. The Color Picker appears. Select the color you want.

Set the background (highlight) color

1. Select the text (or graphic) you want to highlight.
2. On the toolbar, click the arrow next to Highlight Color , then click the color you want.

Set the background (highlight) color

1. Select the text (or graphic) you want to highlight.
2. On the toolbar, click Font Back Color .
3. The Color Picker appears. Select the color you want

Apply bold formatting

1. Select the text to which you want to apply the formatting.
2. On the toolbar, click Bold **B**.

Remove bold formatting

1. Select the text you want to change.
2. On the toolbar, click Bold **B**.

Apply italic formatting

1. Select the text to which you want to apply the formatting.
2. On the toolbar, click Italic **I**.


Remove italic formatting

1. Select the text you want to change.
2. On the toolbar, click Italic **I**.


Underline text

1. Select the text you want to underline.
2. On the toolbar, click Underline **U**.


Remove an underline

1. Select the text you want to change.
2. On the toolbar, click Underline  .



Apply strikethrough formatting

1. Select the text to which you want to apply the formatting.
2. On the toolbar, click Strikethrough  .



Remove strikethrough formatting

1. Select the text you want to change.
2. On the toolbar, click Strikethrough  .


Make text superscript or subscript

1. Select the text to which you want to apply the formatting.
2. On the toolbar, click Superscript  or Subscript  .


Remove superscript or subscript text

1. Select the text you want to change.
2. On the toolbar, click Superscript  or Subscript  .

Insert a picture

1. Click where you want to insert the picture.
2. On the toolbar, click Insert Picture  .
3. The Insert Image – Web Page Dialog appears. Locate the picture you want to insert.
4. Double-click the picture you want to insert.

Create a link


1. Select the text or picture you want to display as a hyperlink.
2. On the toolbar, click Insert Hyperlink  .
3. The Hyperlink dialog appears.
4. In the **Type** box choose what type you intend to link to.
5. In the **URL** box, type the address you want to link to.
6. Click OK.

Unlink


Remove a hyperlink completely

1. Select the hyperlink.
2. Press delete.



Remove a hyperlink but keep the text

1. Right-click the hyperlink.
2. On the toolbar, click Unlink  .


Remove font formatting

1. Select the text you want to change.
2. On the toolbar, click Remove Font Formatting  .
Note: This does not remove styles.


Align text left or right

1. Select the text you want to align.
2. On the toolbar, click Align Left  or Align Right  .



Center text

1. Select the text you want to center.
2. On the toolbar, click Center  .



Justify text

1. Select the text you want to justify.
2. On the toolbar, click Justify  .

Add numbering or bullets



1. Select the text to which you want to apply bullets or numbering.
2. On the toolbar, click Bullets  or Numbering  .

Remove numbering or bullets

1. Select the text from which you want bullets or numbering removed.
2. On the toolbar, click Bullets  or Numbering  .




Change the indentation of text

Increase or decrease the left indent of a paragraph.


1. Select the paragraph you want to change.
2. On the toolbar, click Increase Indent  or Decrease Indent  .

Move or copy text and graphics


Select the item you want to move or copy.


1. To move the item, click Cut  on the toolbar. To copy the item, click Copy  on the toolbar.
2. Click where you want the item to appear.
3. On the toolbar, click Paste  .

Delete all text and graphics


1. On the toolbar, click Delete All  .
2. A dialog asking "Do you want to delete all the HTML and text presently in the editor." appears. If you do, click OK. If you do not, click cancel.

Undo or redo


1. Click Undo  on the toolbar to undo the very last action you took.

2. If you change your mind and do not want to undo an action, click Redo  on the toolbar.


Print a document/screen

1. Print the active document by clicking Print  on the toolbar.
2. The Print dialog appears.
3. Select your options.
4. Click Print.


Check spelling

Check the spelling on your document by clicking Spell/Grammar  on the toolbar.

Insert a symbol


1. Click where you want to insert a symbol.
2. On the toolbar, click the arrow next to Symbols , then click the symbol you want.

Insert horizontal rule

1. Click where you want to insert a horizontal line.
2. On the toolbar, click Insert Horizontal Rule .


Insert the date

Insert the current date


1. Click where you want to insert the current date.
2. On the toolbar, click Insert Date .

Insert the time

Insert the current time

1. Click where you want to insert the current time.
2. On the toolbar, click Insert Time .

Word count

Find out how many words are in your document by clicking Word Count .

Links Module

This module renders a list of hyperlinks.

Add a link


Add a new link by clicking [Add new link](#).

The Link Details page opens.


1. In the **Title** text box, type a name for the link.
2. In the **URL** box, type the address you want to link to.
3. In the **Mobile URL** box, type the address you want to link to.
4. In the **Description** text box, type a description of the link.
5. In the **View Order** text box, type the order (an integer) you want the links to be seen.

6. Click **Save**.

Edit a link

Edit a link by clicking Edit  next to the title of the link. Make the changes you want then click **Save**.

Module Settings

You can change the module settings by clicking Module Settings . The Module Settings page opens.


1. In the **Module Name** text box, type in title you want use for the module.
2. If you want to set the refresh rate, type the number of second in the **Cache Timeout (seconds)** textbox.
3. If you want the module to be available for mobile users, click the **Show to Mobile Users** checkbox.
4. If you want this module to appear on all pages/tabs, click the **Show on All Tabs** checkbox.
5. If you want the name of the module to be visible, click the **Show Title** checkbox.

The Module Permissions section allows you to control and specify viewing and editing permissions of a module. Each authenticated portal user is assigned a unique role within the portal's domain. Unauthenticated users get allocated to default roles, in this case All Users. Each module has three default roles, Administrators, All Users, and Authenticated Users. Additional roles may be added.

1. If you want to make the module visible for a specific role, click the **Roles That Can View Module** checkboxes.
2. If you want to grant permission to edit the module, click the **Roles That Can Edit Module** checkboxes.
3. If you want the same module permissions you have established to be used on Child Modules, click the **Replicate Permissions to Child Modules** checkbox.

After completing all the changes you want, click **Save**.

Module Settings: HTML Document

You can change the HTML Document module settings by clicking Module Settings . The module settings page opens.

1. In the **Module Name** text box, type in title you want use for the module.
2. If you want to set the refresh rate, type the number of second in the **Cache Timeout (seconds)** textbox.
3. If you want the module to be available for mobile users, click the **Show to Mobile Users** checkbox.
4. If you want this module to appear on all pages/tabs, click the **Show on All Tabs** checkbox.
5. If you want the name of the module to be visible, click the **Show Title** checkbox.

Permissions

The Module Permissions section allows you to control and specify viewing and editing permissions of a module. Each authenticated portal user is assigned a unique role within the portal's domain. Unauthenticated users get allocated to default roles, in this case All Users. Each module has three default roles, Administrators, All Users, and Authenticated Users. Additional roles may be added.

1. If you want to make the module visible for a specific role, click the **Roles That Can View Module** checkboxes.
2. If you want to grant permission to edit the module, click the **Roles That Can Edit Module** checkboxes.
3. If you want the same module permissions you have established to be used on Child Modules, click the **Replicate Permissions to Child Modules** checkbox.

Policy

The Module Policy Owners (These roles can manage the associated policy.) section allows you to control and specify the roles that can view and edit the HTML Document.

1. If you want to make the HTML document visible for a specific role, click the **Roles That Can View HTML Document** checkboxes.
2. If you want to grant permission to edit the HTML document, click the **Roles That Can Edit HTML Document** checkboxes.

After completing all the changes you want, Click **Save**.

Quick Links Module

Like Links, this module renders a list of hyperlinks. Rather than rendering the name, QuickLinks shows the title "Quick Launch". Its compact rendering and generic title make it ideal for a set of 'global' links that appears on several pages/tabs in the portal.

Add a Quick Link

Add a new link by clicking **Add new link**.

The Link Details page opens.


1. In the **Title** text box, type a name for the link.
2. In the **URL** box, type the address you want to link to.
3. In the **Mobile URL** box, type the address you want to link to.
4. In the **Description** text box, type a description of the link.
5. In the **View Order** text box, type the order
6. Click **Save**.

Redirect Module

Use the Redirect module to easily channel (move) users anywhere within your portal. You must be an administrator to add or change the Redirect module. Click **Admin** to make changes.

The Redirect Admin page opens.

1. In the Navigate URL text box, type the address you want to link to.
2. Click **Save**.

You can edit an existing announcement by clicking Edit . The Announcement detail page will open.

1. Make the changes you want.
2. Click **Save**.

RSS Feed (Real Simple Syndicated Feed) Module

The RSS Feed module allows you to display dynamic content from external data and news feed sources.

Edit a RSS Feed

You can change the RSS Feed on your page by clicking [Admin](#). The RSS Feed Settings page opens.

1. In the **RSS Feed URL** text box, type in the address for the link.
2. In the Maximum # of Items box, type in the number of items you want to appear in the module.
3. In the Stylesheet box, select the stylesheet you want.
4. Click [Save](#).

Tasks Module

You can use the Tasks module to manage and delegate specific tasks and action items. The Tasks module shows a list view of each entry and includes the title, status, priority, due date, assigned to and % complete. An expanded view of a task can be displayed by clicking the name of the task.


Add a task

You can add a task by clicking [Add New Task](#).

The Task Details page opens.

1. In the **Title** text box, type the name of the Task.
2. In the **Description** text box, type a description of the task.
3. In the **% Complete** box, type the percentage of the task that is finished.
4. In the **Status** box, select Not Started, In Progress, Deferred, or Complete.
5. In the **Priority** box, select High, Normal or Low.
6. Enter a name in the **Assigned to** box.
7. In the **Start Date** box, type the date or click the **Calendar** to select the start date.
8. In the **Due Date** box, type the date or click the **Calendar** to select the due date.
9. Click [Save](#).

Update an existing task

You can edit or update an existing task by clicking [Edit](#) . The Task Details page opens. Make the changes you want then click [Save](#).

To change from the list view to the full view, click on the name of the task.

Click [Edit](#), to edit or update the information. To return to the Task module, click [Edit](#) then [Save](#).




User Defined Table & User Defined Table Entry Form Modules

This module allows you to define your own tables for collecting and managing data. You can enter data directly into the table or use the UDT Entry Form.

Create a User Defined Table

Set up your user defined table by clicking [Admin](#). The Manage User Defined Table page opens.

1. Click [Add New Field](#)
2. If you want the field to be seen, click the Visible checkbox.
3. If you want the field to be searchable, click the IsSearchable checkbox.
4. If data must be added for each record, click the IsRequired checkbox.
5. In the Title textbox, type the name of the field.
6. Select the type of data to be entered in the Type drop-down list.
7. Determine the maximum length in the MaxLength text box.
8. In the Description text box, add additional information.

9. On the left, click Save  to save the field.
10. Repeat steps 1 through 9 for each field in your table.
11. In the **Sort Order** drop-down, select the way you want the data to be sorted.
12. Make the field available for searches by clicking the **Allow Searching** checkbox.
13. Enter the data you want in the **Initial Query** text box.
14. After a field has been added you can edit the data. Click Edit  on the left of the field.
15. To delete a field, click Delete  on the left of the field.
16. Click **Back** to view the table and add new records.

Add data using the UDT Entry form




To enter data using the UDT Entry form, simply click in the appropriate text boxes, type in your information, then click **Save**. The record will be added to your table.

Note: One UDT Entry form module can support many user defined tables. To change the table in the form, click Admin, then choose the table you want to display from the **User Defined Table** drop-down list.

Add data to a table

Add data to an existing table by clicking **Add New Record**. The User Defined Table page opens. Add the information you want then click **Save**. You can also add data using the UDT Entry Form. Fill in the text boxes then click **Save**.

Manage records in a table

1. To view a record in list format, click View  on the left.
2. To edit a record, click the Edit  on the left.
3. To delete a record, click Delete  on the left.

Notification

Notification mail can be set up. In the UDT Entry Form, click **Admin**. The User Defined Table Entry Settings page opens. Fill in the information in the **Notification Details (To disable notification remove the email address)** section.

1. In the **Send Notification To** box, type the email address you want to use.
2. In the Send Notification From box, type the email address you want to use.
3. In the **Notification Subject** box, type the subject.
4. In the **Notification Body** box, type additional text.
5. In the **Outgoing Mail Server** box, type the name of the outgoing mail server you are using.
6. In the **Redirect to URL** text box, type the address you want to use.
7. Click **Save**.