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Active Community CE 21.2 User Guide

This guide provides the information you need to use Active Community to effectively collaborate with your business partners and ensure that your most current information is available to everyone in your community.

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This documentation has been created for software version 21.2.

It is also valid for subsequent software releases unless OpenText has made newer documentation available with the product, on an OpenText website, or by any other means.

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Introduction

Welcome to OpenText™ Active Community. Our online solution accelerates communication and collaboration across your extended trading partner network. Many of the projects you used to complete manually via email or phone can be done quickly and easily in OpenText Active Community.

Audience

The audience for this guide is buyers and suppliers who use Active Community for their community management.

System Requirements

OpenText Active Community is certified to run in the following browsers:

- Microsoft Internet Explorer 11
- Mozilla Firefox 85
- Google Chrome 89

Operating Systems

OpenText Active Community supports the following operating systems:

- Microsoft Windows
- Mac OS X

Web Content Accessibility Guidelines (WCAG)

Active Community is undergoing updates with every release, in accordance with the Web Content Accessibility Guidelines (WCAG), to provide better accessibility to people with disabilities. For more information, see OpenText's Accessibility policy.

Accessing Product Documentation

Most documentation is delivered in Adobe Acrobat PDF format. To read and print the documents, you will need Adobe Acrobat Reader, a free product from Adobe Systems. For information about downloading and installing Acrobat Reader, see the section, "[Installing Adobe Reader.](#)"

Installing Adobe Reader

Since most OpenText product documentation is delivered in Adobe Acrobat PDF format, you will need Adobe Reader to read and print the documentation. Adobe Reader is a free product from Adobe Systems.

To download and install Adobe Reader

- 1 Launch a Web browser and navigate to <http://get.adobe.com/reader>
- 2 Download and install Adobe Reader. Follow the screens, accepting the defaults.

You can now access OpenText product documentation by double-clicking the PDF file.

Contacting Technical Support

For assistance, contact Cloud Support Services (CSS) by sending an email to Activecommunitysupport@opentext.com

Your email will automatically generate a support ticket in the ticketing system. You will receive an email notification that a support ticket has been created.

This section provides an overview of the Active Community user interface and includes information about logging in and out, changing your password, navigating the application and menus, changing the language of the UI, and other general information.

Logging In to Active Community

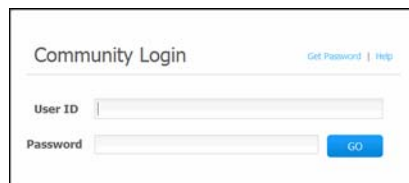
Important: You need to have an account in Active Community before you can log in. Your account can be created by the Community Administrator or another user who has permission to create accounts.

Note: The first time you log in to Active Community, you must set your password using the reset password procedure. See ["Resetting Your Password"](#) on page 4 for instructions.

To log in

- 1 Access the Internet with a supported browser. Active Community is certified to run in the browsers listed in ["OpenText Active Community is certified to run in the following browsers:"](#) on page 1.
- 2 In the Address field, type the specific URL for your hub for Active Community (***hubname*.rollstream.com** where *hubname* is the name of your hub). If you don't know your hub URL, you can type the generic URL **account.rollstream.com**.

The Community Login page opens.



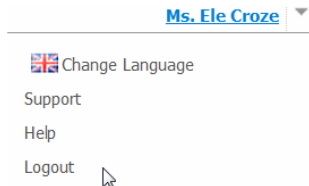
The screenshot shows a web form titled "Community Login". At the top right of the form area, there are two small links: "Get Password" and "Help". Below the title, there are two input fields. The first is labeled "User ID" and the second is labeled "Password". To the right of the "Password" field is a blue button with the text "GO" in white capital letters.

- 3 Type your **User ID** and **Password**.
 - 4 Click **Go**.
- You are logged in to Active Community.

Logging Out of Active Community

To log out of Active Community and return to the Login page

- 1 Move your cursor over your user name in the corner of the page, and click **Logout**.



You are logged out of Active Community and return to the Login page.

Resetting Your Password

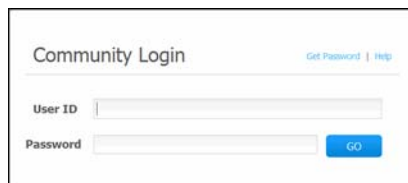
If you have forgotten your password, use this procedure to reset it to a new one. If you want to change your password, see ["Changing Your Password" on page 37](#).

Note: The first time you log in to Active Community, you must reset your password using this procedure.

To reset your password:

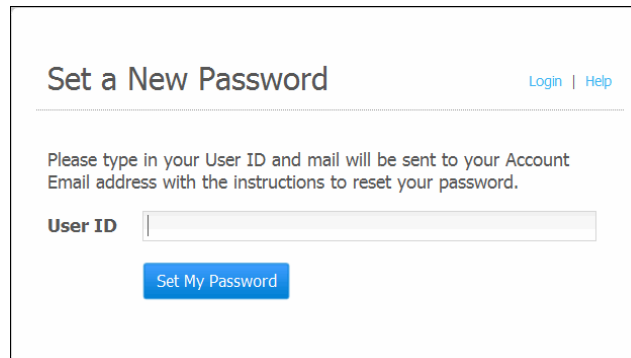
- 1 Access the Internet with a supported browser. Active Community is certified to run in the browsers listed in ["OpenText Active Community is certified to run in the following browsers:" on page 1](#).
- 2 In the Address field, type the specific URL for your hub for Active Community (**hubname.rollstream.com** where *hubname* is the name of your hub). If you don't know your hub URL, you can type the generic URL **account.rollstream.com**.

The Community Login page opens.

A screenshot of the "Community Login" page. The page title is "Community Login" and there are links for "Get Password" and "Help". Below the title, there are two input fields: "User ID" and "Password". A blue "GO" button is located to the right of the Password field.

- 3 Click **Get Password**.

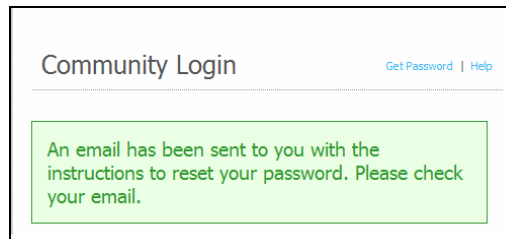
The Set a New Password page opens.



4 Type your **User ID**, and click **Set My Password**.

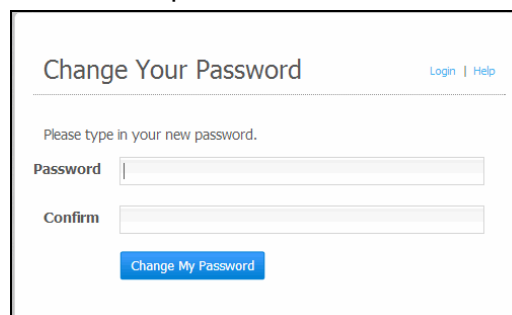
A message indicates that you will be sent an email message with instructions to reset your password. This should occur within a few minutes.

Note: The instructions are sent to your Account Email. This is the email address associated with your User ID and is used to set a new password.



5 Check your account email. Passwords are not sent in emails; however, the email message contains a link which opens a page in Active Community and allows you to enter a new password.

6 Click the link provided in the email. The Change Your Password window opens.



7 Type a password, and then type it again in the Confirm box.

Passwords must be at least 8 characters and contain one character from 3 of these 4 types:

- number
- lowercase
- uppercase

- special character (for example, %^&\$#)

Note: Your password can include spaces, but spaces that occur before or after your password will be removed when it is saved.

8 Click **Change My Password**.

The Community Login page opens.

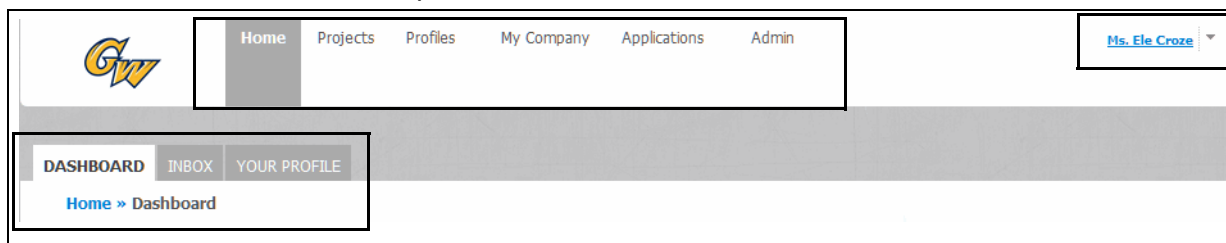
9 To log in, type your **User ID** and new **Password**.

10 Click **Go**.

You are logged in to Active Community.

Navigating in Active Community

Active Community functions are grouped into modules that are listed at the top of the user interface. When you click a module name, it opens to display tabs and links for its components.



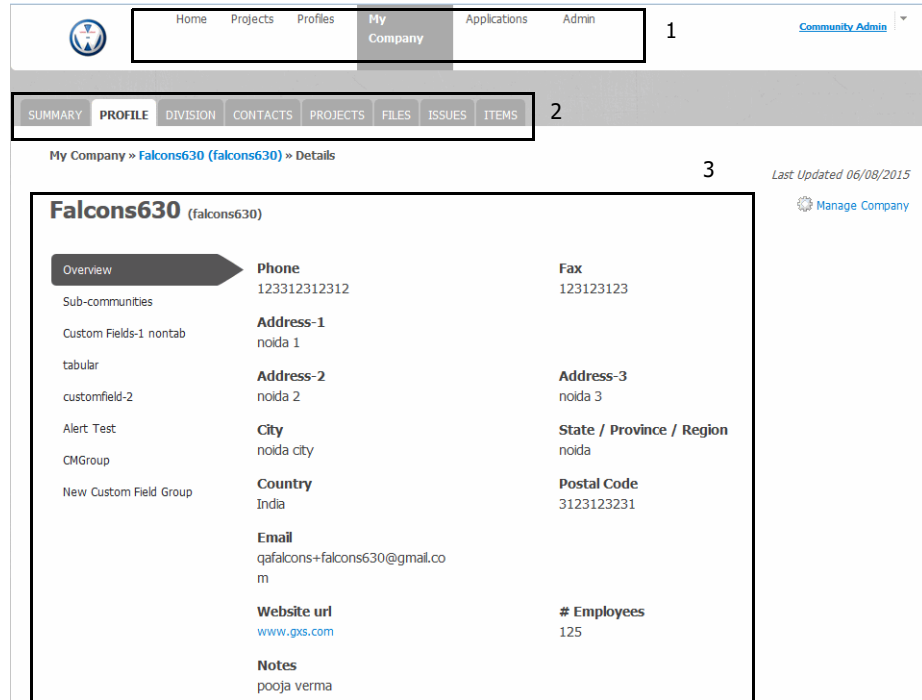
Important: You will see only the modules, tabs, and links you can access based on your roles and permissions. If you cannot access a module you need, contact your system administrator to adjust your permissions.

Topics include:

- ["Using Modules, Components, and Tabs" on page 7](#)
- ["Focus of UI when Editing a Company Field Group" on page 9](#)
- ["Using Auto-Fill" on page 10](#)
- ["Using the Functions Under Your User Name" on page 10](#)

Using Modules, Components, and Tabs

By selecting different modules, different tabs display so you can perform functions specific to that module. For example, in the screen shot, you have selected the My Company module. The tabs that display allow you to access all information related to your company, including its profile, summary information about it, its file library, and any divisions, contacts, items, projects, and subscriptions that are associated with it.



The parts of a page:

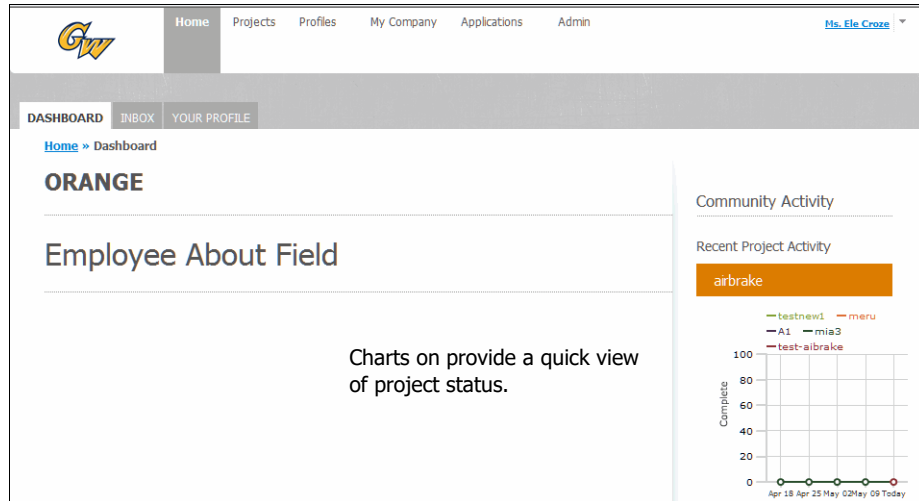
Key	Description
1	Modules
2	Tabs
3	Page shows information about the selected module, including tabs and additional links.

See “About the Home Module” on page 7 and “Summary of Modules, Components, and Tabs” on page 8.

About the Home Module

Active Community opens to the Home module, which includes three tabs: Dashboard, Inbox, and Your Profile. You use the tabs to complete various functions

related to your work in Active Community and your profile. The Home module also uses graphics and charts to show the progress of projects and activities.



Summary of Modules, Components, and Tabs

The table lists each Active Community module and its components and tabs. Within a module, the tabs group or collect all relevant information about the selected item, such as a contact, activity, or company.

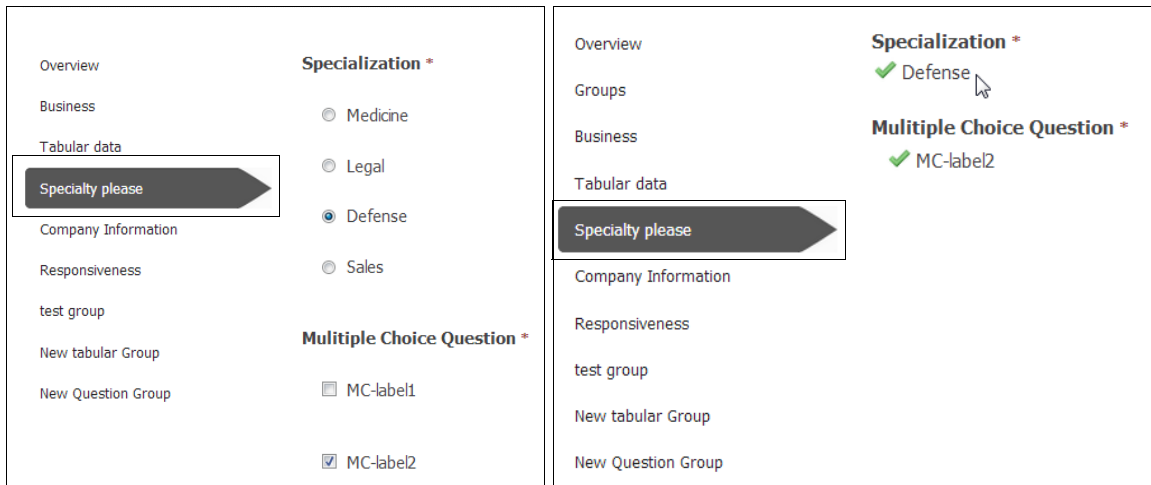
Modules/Components	Primary Tabs	Sub-tabs
Home	<ul style="list-style-type: none"> ■ Dashboard ■ Inbox ■ Tasks ■ Your Profile 	None
Projects	<ul style="list-style-type: none"> ■ Your Projects ■ All Projects ■ Default Project Permissions 	For each project: <ul style="list-style-type: none"> ■ Overview ■ Activities ■ Team ■ Participants ■ Files ■ Web Forms ■ Permissions
Profiles <ul style="list-style-type: none"> ■ Companies 	For each company: <ul style="list-style-type: none"> ■ Directory ■ Settings ■ Reports 	For each company: <ul style="list-style-type: none"> ■ Summary ■ Profile ■ Division ■ Contacts ■ Projects ■ Files ■ Items ■ Audit Log

Modules/Components	Primary Tabs	Sub-tabs
<ul style="list-style-type: none"> ■ Contacts 	<ul style="list-style-type: none"> ■ All Contacts ■ Core Fields ■ Custom Fields ■ Alerts ■ Permissions ■ Freshness ■ Business Roles 	For each contact: <ul style="list-style-type: none"> ■ Profile ■ Projects ■ Activities ■ Files ■ Web Forms ■ Audit Log
<ul style="list-style-type: none"> ■ Items 	<ul style="list-style-type: none"> ■ Items ■ Custom Fields 	None
My Company	<ul style="list-style-type: none"> ■ Summary ■ Profile ■ Division ■ Contacts ■ Projects ■ Files ■ Items ■ Subscriptions 	None
Applications (optional)	<ul style="list-style-type: none"> ■ 	
<ul style="list-style-type: none"> ■ Registration 	<ul style="list-style-type: none"> ■ Registration Requests ■ Dashboard ■ Admin 	None
<ul style="list-style-type: none"> ■ Workspaces 	No tabs	No tabs
<ul style="list-style-type: none"> ■ Trading Grid Online 	No tabs	No tabs
Admin	<ul style="list-style-type: none"> ■ Community Settings ■ Security Settings ■ Security Roles ■ Profile Freshness ■ Alerts ■ Change Management ■ Usage Reports ■ Provisioning 	None

Focus of UI when Editing a Company Field Group

When you edit a Company field group, the focus on the field group you are editing remains on that field group after you have saved your changes. This allows you to

easily verify that your changes were successful and additional changes can be made, if necessary.

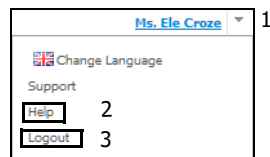


Using Auto-Fill

Some fields have an auto-fill feature. As you type a value in the field, a drop-down list displays and is automatically populated with choices (listed alphabetically) that match the values you are typing. A limited number of choices are displayed. If the choice you want is not displayed, enter more or different characters to narrow the choices. The more characters you type, the closer the match, and the less items that display in the drop-down list. You can select an item from this list.

Using the Functions Under Your User Name

Your user name is always visible in the corner of the user interface. You can access several important functions by moving your mouse cursor over your user name.



The parts of the menu:

Key	Description
1	Your user name.
2	Click to view online help.
3	Click to log out of Active Community.

The functions include:

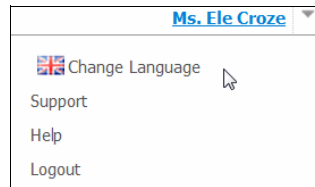
- [“Changing Your Language” on page 11](#)
- [“Contacting Support” on page 11](#)
- [“Accessing Online Help” on page 12](#)
- [“Logging Out of Active Community” on page 4](#)

Changing Your Language

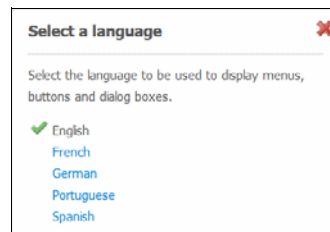
You can select a different language in which to display the user interface (UI). English, French, German, Portuguese, and Spanish are available at this time.

To change your language

- 1 Move your cursor over your user name in the corner of the page, and click **Change Language**.



The **Select a language** dialog box opens.



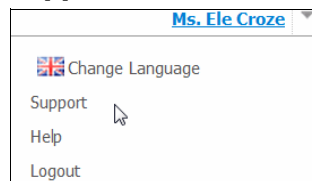
- 2 From the list, select the language you want.
The UI menus, buttons, and dialog boxes display in the language you selected.

Contacting Support

If needed, you can send an email to the Active Community support team.

To send the support team an email message

- 1 Move your cursor over your user name in the corner of the page, and click **Support**.



- 2 In the Get Support dialog, click the **click here** link.
A security warning opens.
- 3 Click **Allow**, then compose your message and describe the issue you are having.
- 4 Click **Send**.

Customizing a Support Message

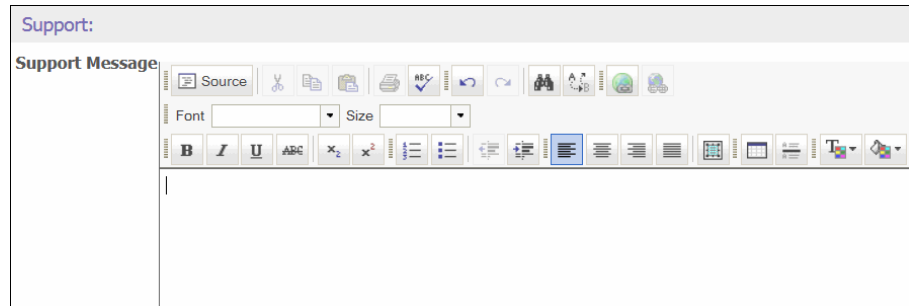
Hubs can customize the support message that displays for all users of its community whenever a user selects Support from the drop-down menu in the corner of the page (move your cursor over your user name to display the menu).

To customize a support message

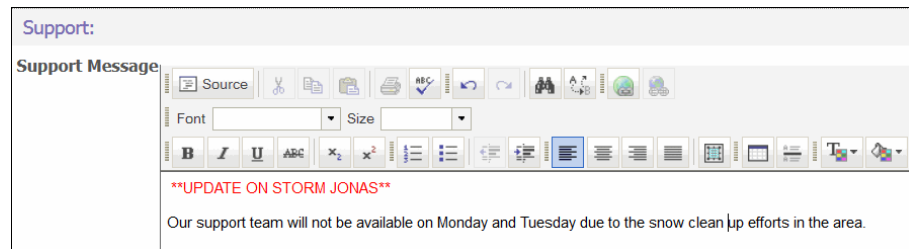
- 1 Click **Admin > Community Settings** tab > **Edit Community**.

The Edit Community Settings page opens.

- 2 Scroll down to the Support section.



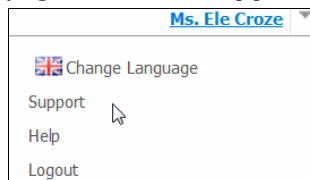
- 3 Type your message in the content area.



Use the editor options to format your message including hyperlinks and links to email addresses.

- 4 Click **Save**.

- 5 To view the message, move your cursor over your user name in the corner of the page, and click **Support**.



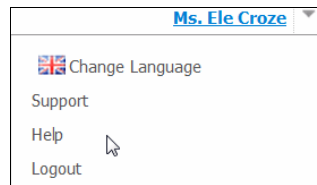
The message displays.

Accessing Online Help

The Active Community online help provides the information you need to use Active Community effectively.

To view the online help

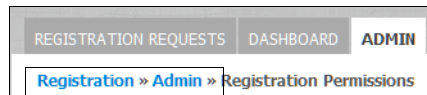
- 1 Move your cursor over your user name in the corner of the page, and click **Help**.



- 2 Online help opens in a new window.

Using Breadcrumbs

Breadcrumbs are clickable links that show you where you are in Active Community and how you got there. They are available for the tabs in a selected module.



To return to a previously selected page

- Click a **breadcrumb** link.

Customizing Your Community's Dashboard

As an administrator, you can customize the dashboard that displays as the home page of your community. You can choose to display up to three company custom fields (for example, partner credentials) on your Dashboard. Keep in mind that the Dashboard can only be seen by users in the hub community (employees).

Note: Data tables cannot be shown on the Dashboard.

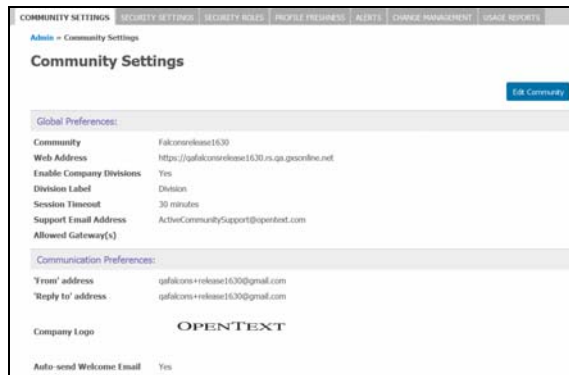
See also:

- ["Adding a Logo to Your Community" on page 14](#)
- ["Adding Links to the Bottom of Your Dashboard" on page 15.](#)

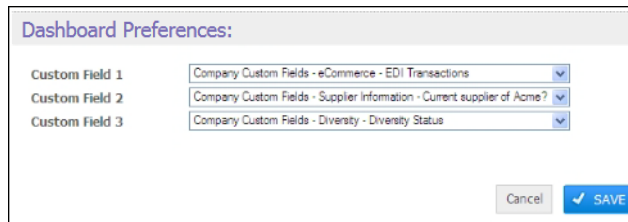
To customize your community dashboard

- 1 Click the **Admin** tab, and then click the **Community Settings** tab.

The Community Settings page opens, showing global community and communication preferences.



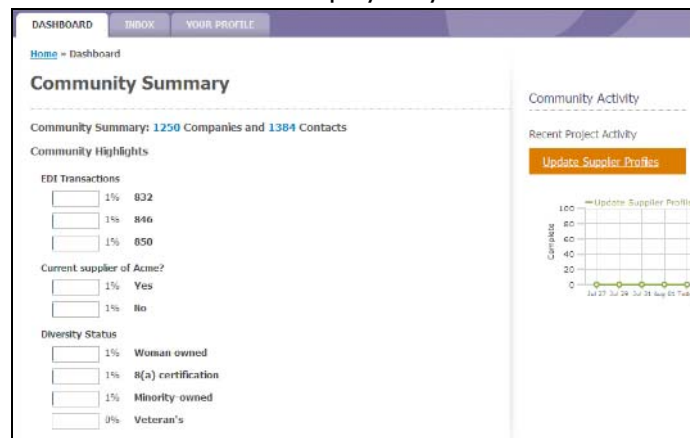
- 2 Click **Edit Community** and scroll down to Dashboard Preferences.
- 3 Select the custom fields that you want to display on the Dashboard.



Note: Fields that are data tables are not available for you to select; they cannot be displayed on the Dashboard.

- 4 Click **Save**.

The custom fields now display on your Dashboard.

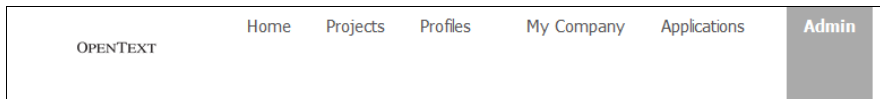


- 5 Go to ["Adding a Logo to Your Community"](#) on page 14 or ["Adding Links to the Bottom of Your Dashboard"](#) on page 15.

Adding a Logo to Your Community

As an administrator, you can customize your community by adding a company logo. This logo will display on every screen in your Active Community community,

which can help your business contacts identify the community to which they belong.

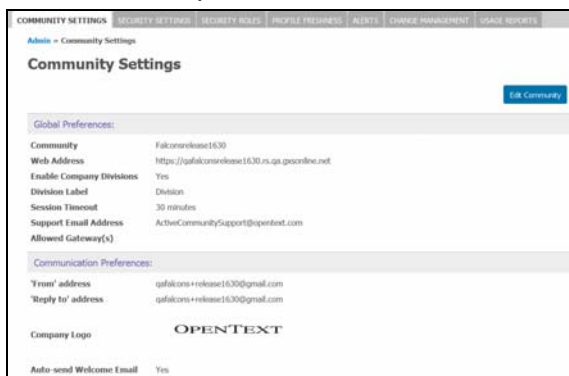


Important: The ideal size of your logo image should be 130 pixels wide by 67 pixels high. If your logo is wider than 130 pixels, the width will be resized and scaled down. If your logo is more than 67 pixels high, it may appear cropped at the bottom. This may cause some distortion of the image.

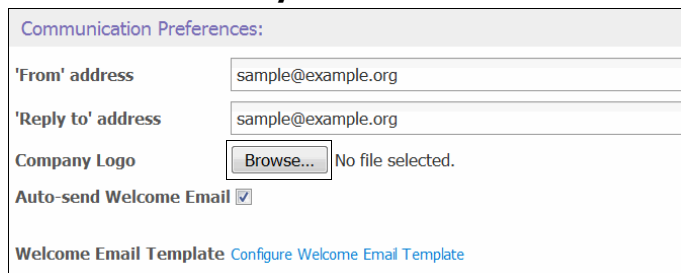
To add a logo to your community

- 1 Click the **Admin** tab, and then click the **Community Settings** tab.

The Community Settings page opens, showing global community and communication preferences.



- 2 Click **Edit Community** and scroll down to Communication Preferences.



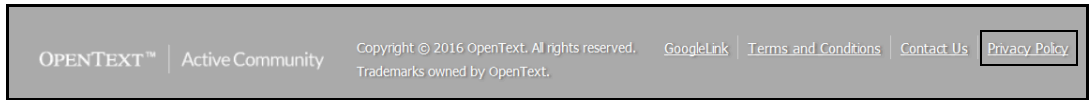
- 3 For Company Logo, click **Browse**.
The File upload dialog box opens.
- 4 Navigate to an image file on your hard drive (for example, a .GIF file), select it, and click **Open**. The logo is resized (if applicable) and displayed.
Note: The maximum file size is 50 MB.
- 5 Click **Save**.

Adding Links to the Bottom of Your Dashboard

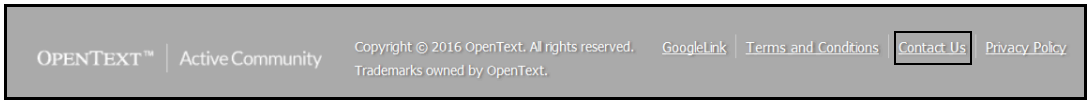
In addition to updating the logo and dashboard in your community, you can also customize your community by adding links in the footer (at the bottom of your community pages) to display text in a pop-up window or to take users to other Web sites.

For example, you can:

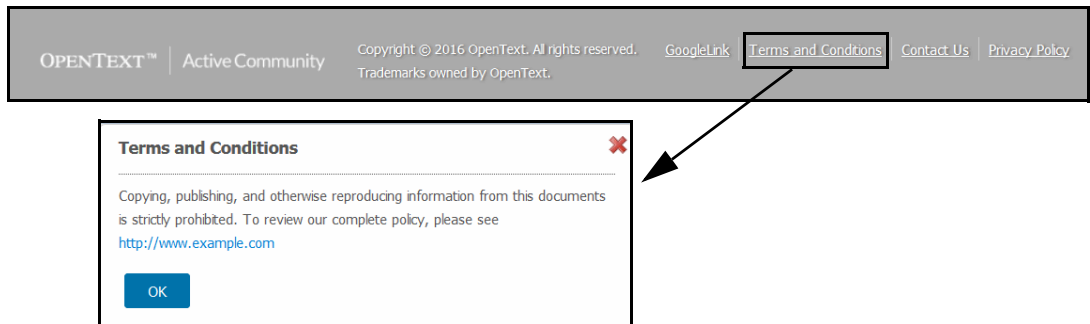
- Link to the privacy policy on your company's web site.



- Link to your Support email address and have a blank email message display in a separate window.



- Link to your terms and conditions of use and display them in a pop-up window.



To customize your community footer

- 1 Click the **Admin** tab, and then click the **Community Settings** tab. The Community Settings page opens, showing global community and communication preferences.



- 2 Click **Edit Community** and scroll down to Footer Preferences.


- 3 Do one of the following:

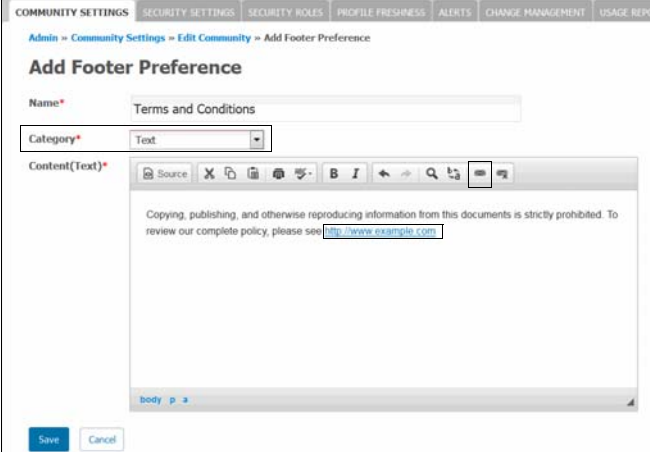
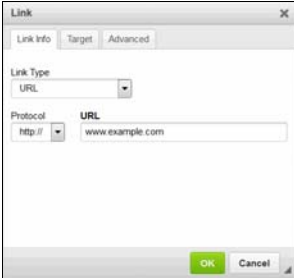
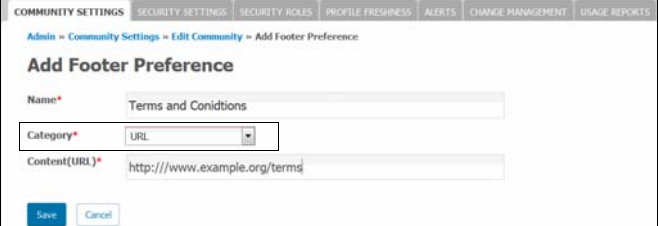
- To add a new link in the footer, click **Add Preference**.
- To edit an existing link, click the name of the link in the list.

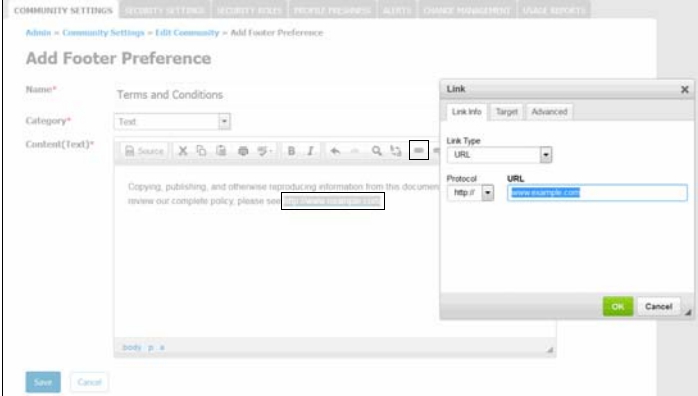
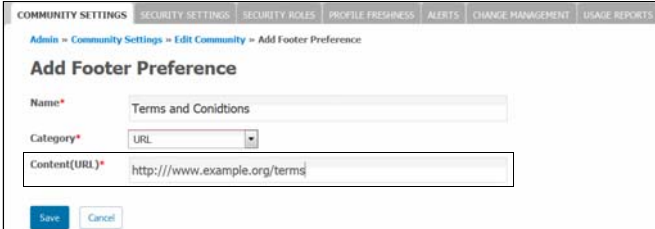


Depending on whether you are adding or editing preferences, the Add Footer Preference or Edit Footer Preference page opens.

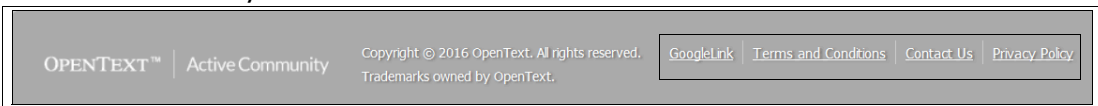
4 Complete the fields as described in the following table.

Field	Description
Name	<p>Required. The name of the link, which is the information the user sees in the footer at the bottom of every community page. For example, "Legal Notice," "Terms and Conditions," or "Contact Us."</p>  <p>COMMUNITY SETTINGS SECURITY SETTINGS SECURITY ROLES PROFILE FRESHNESS ALERTS CHANGE MANAGEMENT</p> <p>Admin » Community Settings » Edit Community » Add Footer Preference</p> <p>Add Footer Preference</p> <p>Name* Terms and Conditions</p>

Field	Description
Category	<p>Required. The type of content for the link. Select one of the following:</p> <ul style="list-style-type: none"> ■ Text—Select this option if you want a block of text to display in a pop-up window when the user clicks your link in the footer. Keep in mind that this text can also contain links to other Web sites, for example, in a Microsoft Outlook or chat message.  <p>To insert links to Web sites within your text block, highlight the text, and click the Link icon to display a dialog box. Select the protocol and type the URL that you want to display. Click the Target tab to specify the target, such as New Window. Click the Advanced tab to specify other properties. Click OK.</p>  <ul style="list-style-type: none"> ■ URL—Select this option if you want to go directly to a Web site when the user clicks your link in the footer. For example, you might have a link called "Legal Notice" that opens a new window to show a page on your company Web site that contains all legal information.  <p>Note: When the user clicks the link in the footer, a new window opens; they do not lose their place in your community.</p>

Field	Description
Content	<p>Required. The text or Web site that your link will display.</p> <ul style="list-style-type: none"> ■ Text - Type the text you want to display in the pop-up window. Keep in mind that if you select Text, you can insert links to Web sites within your text block. Position your cursor, click the Link icon, and in the Link dialog box, select the protocol and type the URL that you want to display and link to.  <ul style="list-style-type: none"> ■ URL (Web site) - Type the URL of the Web site you want to direct the user to. 

5 Click **Save**. Your links now display at the bottom of every page in your community.



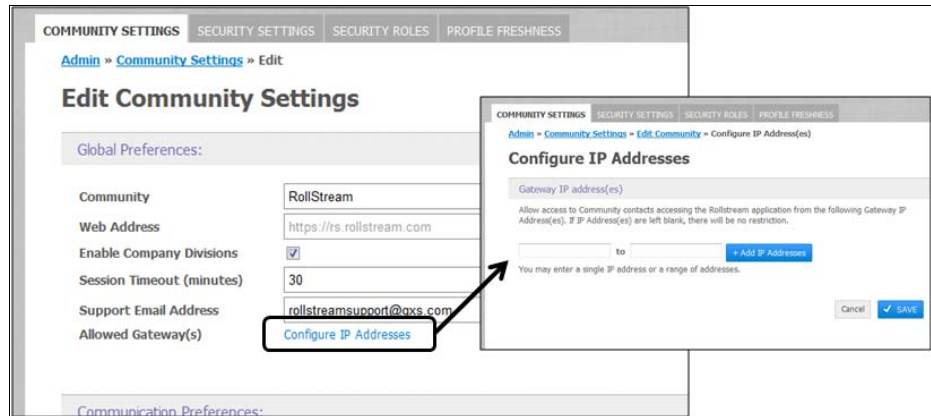
IP Address Restrictions

Active Community access can be restricted to a specific IP address range and used as a means for a customer to control who of (and how) their hub users access Active Community. For example, by entering an IP address range which spans their VPN gateway access points, a customer can ensure that only users who are logged into the hub VPN can access Active Community.

To restrict access to a specific IP address

- 1 Click **Admin > Community Settings** tab > **Edit Community**.

The Edit Community Settings page opens.



- 2 Under Global Preferences, click the **Configure IP Addresses** link.
The Configure IP Addresses page opens.
- 3 Type a single IP address or a range of addresses.
- 4 Click **Add IP Addresses**.
- 5 Click **Save**.

Synchronizing Active Community with Trading Grid Online (TGO)

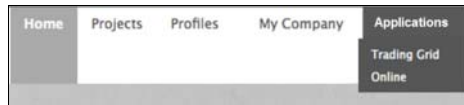
Hub customers who have both an Active Community community and a Trading Grid Online (TGO) community (for example, Intelligent Web Forms (IWF) or Active Orders (AO)) can take advantage of several features that are described in the following topics:

- "Using Active Community/TGO Single Sign On" on page 21
- "Using Active Community/TGO Profile Provisioning" on page 22
- "Using Active Community/TGO Profile Synchronization" on page 22
 - "Enabling and Disabling Synchronization at the Profile Level" on page 22
 - "Synchronization Information for Administrators" on page 23
 - "Synchronization Information for Profiles" on page 23
 - "Ability to Manually Add/Import Bulk Company Profiles" on page 24

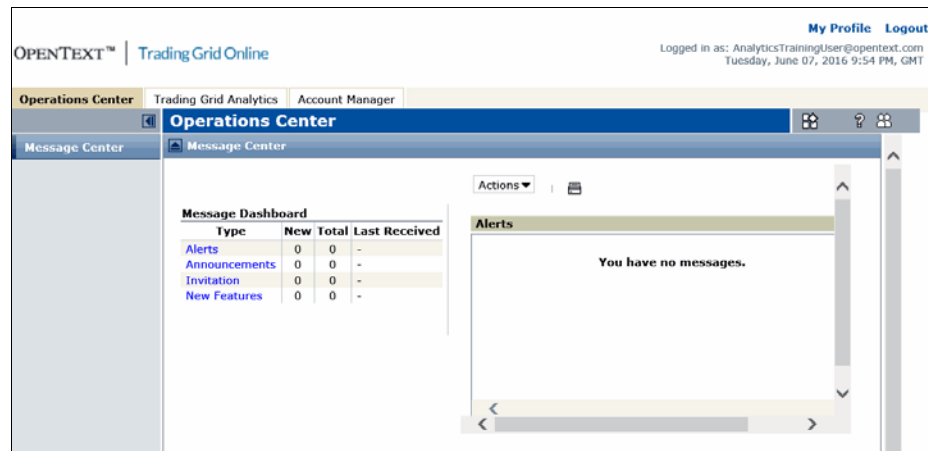
Using Active Community/TGO Single Sign On

Hub customers who have both an Active Community community and a Trading Grid Online (TGO) community (for example, Intelligent Web Forms (IWF) or Active Orders (AO)) can share SiteMinder user authentication, enabling their Trading Partners (spokes) to use their TGO credentials to access both Active Community and TGO.

Customers who access an Active Community community *that has been enabled for SSO* for TGO will be able to navigate to TGO from the Active Community Applications menu.



TGO will then open in a new browser tab or window. The TGO Operations Center displays.



Using Active Community/TGO Profile Provisioning

Hub customers who have both an Active Community community and a Trading Grid Online (TGO) community with a subscription to Intelligent Web Forms (IWF) can approve new suppliers (spokes) through the registration process in Active Community and have the company and user(s) automatically set up in TGO and IWF.

This means that a company created in Active Community is automatically created in TGO as well. Single-Sign On (SSO) functionality (shared user authentication for TGO and Active Community) then allows these spokes to use their TGO credentials to access both Active Community and TGO.

Using Active Community/TGO Profile Synchronization

Hub customers who have both an Active Community community and a Trading Grid Online (TGO) community with a subscription to Intelligent Web Forms (IWF) can make updates to Companies and Contacts in Active Community and have their changes synchronized with TGO.

This means that any updates made to Companies or Contacts in Active Community are automatically updated in TGO as well.

Enabling and Disabling Synchronization at the Profile Level

For communities that have TGO synchronization enabled, functionality is available to select the direction in which they want the synchronization to work (that is, TGO to Active Community, Active Community to TGO, or both directions). The direction is enabled by OpenText when the synchronization is enabled.

Synchronization Information for Administrators

The synchronization direction is displayed in the user interface (UI) on the Community Admin page (**Admin > Community Setting tab > Application Sync section**). The direction cannot be changed using the UI.

Note: A direction is not displayed if Companies do not have synchronization enabled.

Application Sync :	
Synchronized With	Trading Grid Online
Synchronized Direction	Active Community ↔ Trading Grid Online
Synchronized Data	Registered Company Profiles New Contact Profiles Company Profile Updates Contact Profile Updates

Synchronization Information for Profiles

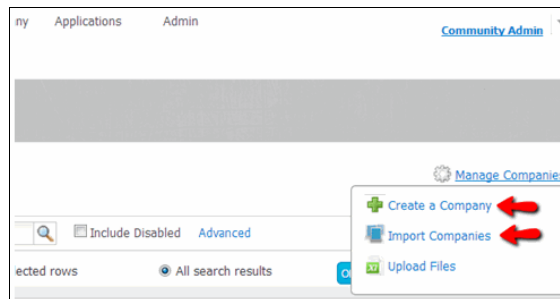
For Companies that have synchronization enabled, the Overview section of both Company and Contact Profile pages indicates whether Trading Grid Online synchronization is enabled or disabled.

SUMMARY	PROFILE	FILES	DIVISION	CONTACTS	ISSUES	ITEMS	PROJECTS
Company Directory » 1-bestbuy (1-bestbuy2) » AAAA (833800008) » Details							
AAAA (833800008)							
Overview	Address 1212						
Groups	City, State / Province / Region, Postal Code dfdf, Maryland 20878						
Business	Country usa						
Tabular data	No Phone/Fax						
test group	No Notes						
Responsiveness	Trading Grid Online synchronization Disabled						
Company Information							
Vender details							
Testing Type head							
Dep G							

Ability to Manually Add/Import Bulk Company Profiles

Communities that have synchronization enabled (that is, are integrated with TGO) can add companies via Registration, as well as through the 'Manage Companies' functionality.

The 'Manage Companies' option is available to users with the appropriate permissions so that they can manually create and import companies, as well as bulk edit companies using the Import functionality.



Note: Any companies created in this manner (manually, and not via Registration) will not automatically synch with TGO. Furthermore, any users (Contact profiles) added to such a Company will not synchronize, and they cannot utilize SSO functionality. In some cases, synchronization may be turned on depending on the company's and/or user's status(es) in TGO, thus enabling SSO. Please email Support with specific inquiries.

There are two types of *profiles* in Active Community: company profiles for a company in an Active Community community and contact profiles, which represent you or another person.

A company or contact profile contains basic information in what are called *core fields*. It also contains *custom fields* which let the hub add more specific information to the profile.

- *Core fields* represent basic information about the company or contact, such as mailing address or contact information.
- *Custom fields* are specific to each community. They add more information to a profile than is available in core fields.

To prevent profile information from becoming out-of-date, reminder emails can be sent to specified roles on a regular basis. See ["Profile Update Reminders" on page 43](#).

Topics include:

- ["Company Profiles" on page 26](#)
 - ["Company Core Fields" on page 26](#)
 - ["Company Custom Fields" on page 27](#)
- ["Contact Profiles" on page 27](#)
 - ["Contact Core Fields" on page 28](#)
 - ["Contact Custom Fields" on page 28](#)
- ["Defining Required Core Fields for Contact and Company Profiles" on page 28](#)
- ["Updating a Company Profile" on page 30](#)
- ["Updating a Contact Profile" on page 31](#)
 - ["Updating Your Profile Photo" on page 36](#)
 - ["Deleting Your Profile Photo" on page 36](#)
 - ["Changing Your Password" on page 37](#)
 - ["Changing Your User ID" on page 38](#)
 - ["Changing Your Account Email" on page 40](#)
 - ["Changing the Communication Email" on page 41](#)
- ["Merging User IDs" on page 41](#)
- ["Profile Update Reminders" on page 43](#)
- ["Responding to Reminder Emails" on page 43](#)

- [“Customizing Profile Reminder Messages” on page 44](#)
- [“Setting Time Intervals for Profile Reminder Emails” on page 45](#)
- [“Discontinuing Profile Reminder Email Messages” on page 47](#)

Company Profiles

This graphic shows a company profile.

The screenshot shows a web interface for a company profile. At the top, there are navigation tabs: SUMMARY, PROFILE (selected), DIVISION, CONTACTS, PROJECTS, FILES, ISSUES, and ITEMS. Below the tabs, the breadcrumb path is 'My Company >> Falcons650 (falcons650) >> Details'. A 'Last Updated 11/18/2015' box and a 'Manage Company' link are visible. The main heading is 'Falcons650 (falcons650)'. On the left, there is a sidebar with 'Overview' selected and a list of sub-communities. The main content area displays the following fields:

Phone	09384938983	
Address-1	Noida	
Address-2	Address-3	
Noida	Noida-3	
City	State / Province / Region	
Noida	UP	
Country	Postal Code	
India	20202	
Email		
qafalcons+sann123@gmail.com		

The profile opens to the Overview tab. Additional tabs let you view or add roles or custom field information about the company. The Last Updated date provides the date that the profile was last modified and is used to trigger when profile update reminder emails are sent.

For more information, see [“Company Core Fields” on page 26](#), [“Company Custom Fields” on page 27](#), and [“Profile Update Reminders” on page 43](#).

Company Core Fields

Core fields represent basic information about a company, such as name, address, phone, and other contact information. Core fields are listed on the Overview tab.

A contact in the Community Administrator role can define which core fields are required and which are optional. A small number of fields are always required (see [“Defining Required Core Fields for Contact and Company Profiles” on page 28](#)).

For company profiles, core fields include:

- Company Name
- Company ID
- Website URL
- Email
- Phone
- Fax
- Address-3
- City
- State/Province/Region
- Postal Code
- Country
- # Employees

- Address-1
- Address-2
- Notes

Company Custom Fields

Custom fields are questions or input fields that help the hub categorize company information beyond the information that is available in core fields. A Community Administrator can create custom fields according to information that needs to be collected from its partners, customers, sales representatives, or contacts in a community.

Custom fields can cover a number of areas such as sales, pricing, compliance, quality, and others. For example, custom fields can:

- Indicate if your suppliers are compliant with an industry standard
- Be used to upload a certificate file
- Hold company information, such as average sales volume and inventory capacity

Custom field groups are listed as tabs on a company profile page. For details, see “Custom Fields” on page 221.

Contact Profiles

This graphic shows a contact profile.

The screenshot shows a user interface for a contact profile. At the top, there are navigation tabs: PROFILE, PROJECTS, ACTIVITIES, FILES, WEB FORMS, and AUDIT LOG. Below the tabs, the breadcrumb path is 'Contacts » Community Admin » Profile'. A 'Last Updated 11/30/2015' box is in the top right, with 'Return to List' and 'Manage Profile' links below it. The main heading is 'Community Admin'. On the left, a vertical list of tabs includes 'Overview' (which is selected and highlighted with a right-pointing arrow), 'Business Roles', 'Security Roles', 'Tags', 'Tabular custom gr', 'Demo Specialized', 'Non tabular custom field group', 'New Custom Field Group', 'specialized-nontab', and 'specialized-tabular'. In the center is a placeholder for a 'Photo' showing a simple cartoon figure of a person with brown hair wearing a blue shirt. To the right of the photo, there are two columns of information: 'User ID' (qafalcons+falcon650@gmail.com) and 'Account Email' (qafalcons+falcon650@gmail.com); 'Company Name' (Falcons650 (falcons650)) and 'Communication Email' (qafalcons+falcon650@gmail.com). Below this is a 'Profile Completeness' section with a progress bar at 38% and the text 'Adding Title will bring you to 45%'.

The profile opens to the Overview tab. Additional tabs let you view or add roles or custom field information about the contact. The Last Updated date provides the date that the profile was last modified and is used to trigger when profile update reminder emails are sent.

For more information, see “Contact Core Fields” on page 28, “Contact Custom Fields” on page 28, and “Profile Update Reminders” on page 43.

Contact Core Fields

Core fields represent basic information about a contact, such as name, address, phone, and other contact information. Core fields are listed on the Overview tab.

The Community Administrator can define which core fields are required and which are optional. A small number of fields are always required (see ["Defining Required Core Fields for Contact and Company Profiles" on page 28](#)).

For contact profiles, core fields include:

- Salutation
- First Name
- Last Name
- Title
- Communication Email
- User ID
- Account Email
- Phone
- Mobile
- Fax
- Address-1
- Address-2
- Address-3
- City
- State/Province/Region
- Postal Code
- Country
- Notes

Contact Custom Fields

Custom fields are questions or input fields that help the hub categorize contact information beyond the information that is available in core fields. A Community Administrator can create custom fields according to information the hub wants to collect at the individual user level.

Custom fields can cover a number of areas such as communication preferences, duties and responsibilities, social media accounts, etc.

Custom field groups are listed as tabs on a contact profile page. For details, see ["Custom Fields" on page 221](#).

Defining Required Core Fields for Contact and Company Profiles

Security role: Community Administrator

Security permissions:

- Contact > Edit Contacts
- My Company > Edit My Company
- Company Core Fields > Manage Company Core Fields
- Community > Manage Community
- Company > Edit Companies

Use this procedure to define which core fields are required and which are optional for contact and company profiles. A small number of fields are always required and cannot be modified.

To define required core fields for contact or company profiles

- 1 Perform the appropriate action:

If you want to define required core fields for...	Do this:
Contacts	<ol style="list-style-type: none"> 1 Click the Profiles tab, and then click Contacts. The Contact page opens. 2 Click the Core Fields tab.
Companies	<ol style="list-style-type: none"> 1 Click the Profiles tab, and then click Companies. The Company page opens. 2 Click the Settings tab, and click the Core Fields link.

The core fields page for contacts or companies opens:

- Contact Core Fields

■ Company Core Fields

DIRECTORY SETTINGS REPORTS

Company Settings > Core Fields

Company Core Fields

Please select the core fields that are required for a Company.
Fields that are always required are checked and disabled.

Company Name	<input checked="" type="checkbox"/>
Company ID	<input checked="" type="checkbox"/>
Website url	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>
Phone	<input type="checkbox"/>
Fax	<input type="checkbox"/>
Address-1	<input type="checkbox"/>
Address-2	<input type="checkbox"/>
Address-3	<input type="checkbox"/>
City	<input type="checkbox"/>
State / Province / Region	<input type="checkbox"/>
Postal Code	<input type="checkbox"/>
Country	<input type="checkbox"/>
# Employees	<input type="checkbox"/>
Notes	<input type="checkbox"/>

Save Cancel

- 2 Select the check boxes for the core fields you want to be required fields. If a check box is de-selected or cleared, it means the field is optional. Some fields cannot be cleared because they are always required.
- 3 Click **Save** to save your changes.

Updating a Company Profile

Security permissions:

- Company > Edit Company
- My Company > Edit My Company

To update a company profile

- 1 Perform the appropriate action:

If you want to update a company profile for...	Do this:
Your company	<ol style="list-style-type: none"> 1 On your Home page, click the My Company tab. 2 Click Manage Company, and then click Edit Company. The Edit Profile page opens to the Overview tab.
A profile for another company	<ol style="list-style-type: none"> 1 Click the Profiles tab, then Companies. The Company Directory page opens. 2 Open the profile for the company you want to update, and then click Manage Company > Edit Company. The Edit Profile page opens to the Overview tab.

The fields in the profile become editable.

My Company >> [Falcons640 \(mycomp_id\)](#) >> Edit Profile

Falcons640 (mycomp_id) Last Updated 10/12/2015

Overview

Custom Fields

Alert Advance Group

Table Group

Pooja V Group

Sandeep Tabular Group

Demo Group

New Custom Field Group

Certificate

Shipping information

Company Name * **Company ID**

Phone * **Fax**

Address-1

Address-2 **Address-3**

City **State / Province / Region**

- 2 Update the core profile fields as needed. Required fields are indicated by an asterisk (*).
For company field descriptions, see Step 3 in the topic ["Adding a Company to Active Community" on page 122](#).
- 3 Use the tabs to update custom field groups for the company.
- 4 Click **Save**.

Updating a Contact Profile

Security permissions:

- Company Permissions > Add, Edit Companies
- Contact Permissions > Add, Edit Contacts
- My Company Permissions > Edit My Company Contacts

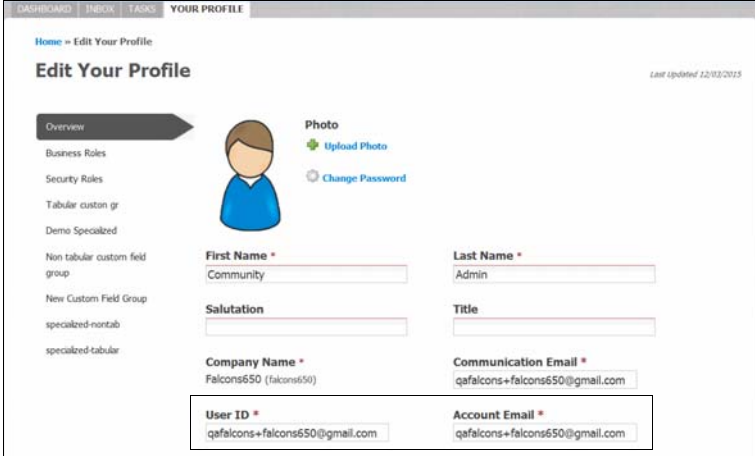
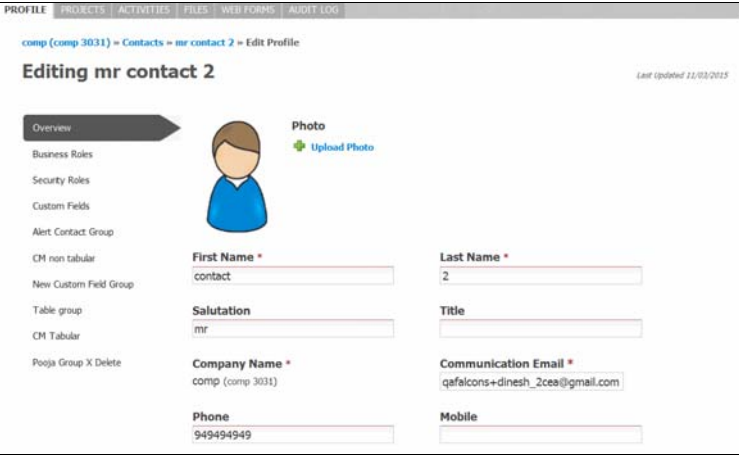
Depending on the permissions assigned to your security role, you might be able to edit another contact's profile. For example, a Community Administrator can edit any profile in the community.

For a profile to be considered 100% complete, the following fields must be filled in:

- First Name
- Last Name
- Title
- Communication Email
- Phone
- Address (first line)
- City
- State/Province/Region
- Zip
- Country
- Profile photo

To update your profile

1 Perform the appropriate action:

If you want to update...	Do this:
Your own profile	<ol style="list-style-type: none"> On your Home page, click the Your Profile tab. The Edit Profile page opens to the Overview tab. Click Edit Profile. The Edit Your Profile page opens to the Overview tab. The fields in your profile become editable. Note that you can edit your User ID and Account Email. 
A profile for someone else	<ol style="list-style-type: none"> Click Profiles > Contacts. Select the contact, and then click Manage Profile > Edit Contact. The Edit Profile page opens to the Overview tab. The fields in the profile become editable. Note that the contact's User ID and Account Email do not display because you <i>cannot</i> edit someone else's User ID and Account Email. See "Changing Your User ID" on page 38 and "Changing Your Account Email" on page 40 

2 On the Overview tab, update core profile fields. Required fields are indicated by an asterisk (*). Do one or more of the following:

- For contact field descriptions, see Step 4 in the topic “Adding a Contact to a Company” on page 124.
- For the Communication Email description, see “Changing the Communication Email” on page 41.
- For the User ID description, see “Changing Your User ID” on page 38.

Note: Only the owning user is permitted to change the user ID. Community Administrators cannot change a user ID; they can only view it.

- For the Account Email description, see “Changing Your Account Email” on page 40.

Note: Only the owning user is permitted to change the Account Email. Community Administrators cannot change an Account Email; they can only view it.

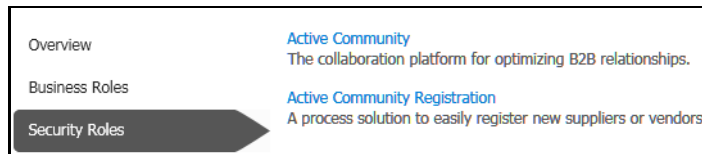
- 3 On the Business Role(s) tab, update user-defined business or functional roles assigned to this contact. Each contact can have multiple roles, but at least one is required.

Note: A default role of “Contact” is assigned if you have not defined any roles. Required.

- 4 On the Security Roles tab, update security roles assigned to this contact, such as a Manager role. If the optional Registration module is available, you can update registration roles.

Note: A default role of “Everyone” is assigned if you have not defined any roles. Required.

The Security Roles page opens.



- a To update security roles, click **Active Community**.
 - 1 From the Available Roles column, select a security role.
 - 2 Click **Add** to add the role to the profile.
 - 3 Click **Done**.
- b To update registration roles, click **Active Community Registration**.

The Configure Roles page opens.

c Make selections as needed in Approval Role, Approval Group, Approval Settings, and Administrative Role.

d Click **Save**.

Note: For more information, see ["Registration Setup"](#) on page 423 and ["Registration Requests"](#) on page 477.

5 On a Custom Field Group tab, complete any custom field questions as necessary. For example, you might need to type text in a field, select one or more options, or choose Yes or No to answer a question.

Note: If questions are displayed in a table, perform the appropriate action:

To...	Do this:
Answer the question	<ol style="list-style-type: none"> 1 Click Add Row. 2 Type or select the answers. 3 Click Save.
Edit an answer row	<ol style="list-style-type: none"> 1 Select the row. 2 Click Edit Row.
Delete an answer row	<ol style="list-style-type: none"> 1 Select the row. 2 Click Delete Row.

6 Click **Save**.

7 To perform additional actions from the profile edit page, see:

- ["Updating Your Profile Photo"](#) on page 36
- ["Deleting Your Profile Photo"](#) on page 36
- ["Changing Your Password"](#) on page 37
- ["Changing Your User ID"](#) on page 38
- ["Changing Your Account Email"](#) on page 40
- ["Changing the Communication Email"](#) on page 41

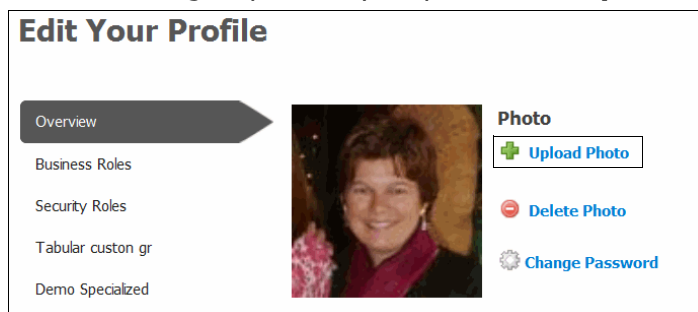
Updating Your Profile Photo

When uploading a photo, an image size of 114 pixels wide by 152 pixels high is recommended. If your photo is wider than 114 pixels, the width will be resized and scaled down. If your photo is higher than 152 pixels, it might be cropped at the bottom or appear to be distorted.

Uploaded files should be less than 50 MB in size and be in .jpg format.

To update your profile photo

- 1 On your Home page, click the **Your Profile** tab.
- 2 Click **Edit Profile**.
The Edit Profile page opens to the Overview tab.
- 3 To add or change a photo in your profile, click **Upload Photo**.



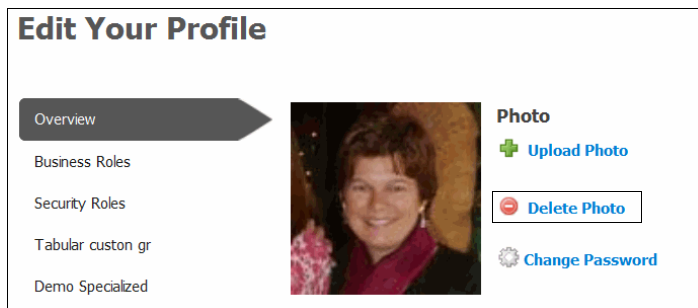
- 4 In the dialog that opens, click **Browse** and navigate to a .jpg file on your hard drive (less than 50 MB), select it, and click **Save**.
A message indicates the photo was uploaded successfully.
- 5 Click the **X** to close the dialog.
The new photo displays the next time you access your profile.

Deleting Your Profile Photo

Use this procedure to delete your profile photo.

To delete a profile photo

- 1 On your Home page, click the **Your Profile** tab.
- 2 Click **Edit Profile**.
The Edit Profile page opens to the Overview tab.
- 3 To delete a photo, click **Delete Photo**.



A dialog box asks you to confirm your deletion.

- 4 Click **OK**.
Your profile photo is deleted.

Changing Your Password

Use this procedure to change your password from your profile.

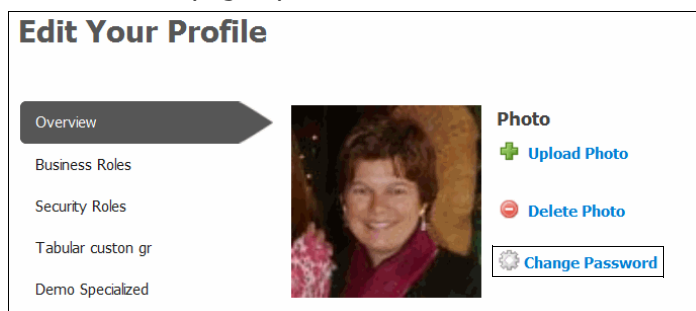
Note: If you have forgotten your password and need to reset it, or if you are logging in to Active Community for the first time, see ["Resetting Your Password"](#) on page 4.

To change your password from your profile

- 1 On your Home page, click the **Your Profile** tab.

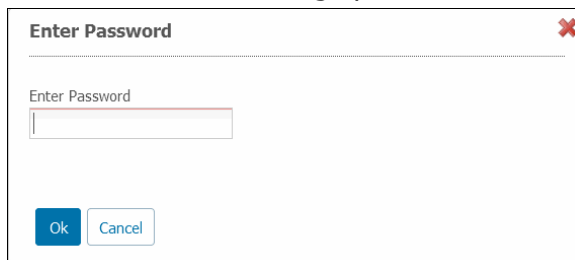
- 2 Click **Edit Profile**.

The Edit Profile page opens to the Overview tab.



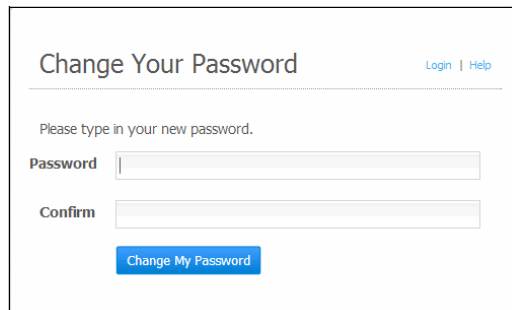
- 3 To change your password, click **Change Password**.

The Enter Password dialog opens.



- 4 Type your current password, and click **OK**.

The Change Your Password dialog opens.



- 5 Type a new password, and then type it again in the Confirm box.

Passwords must be at least 8 characters and contain one character from 3 of these 4 types:

- number
- lowercase
- uppercase
- special character (for example, %^&\$#)

Note: Your password can include spaces, but spaces that occur before or after your password will be removed when it is saved.

6 Click **Change My Password**.

The Community Login page opens. You need to log back in.

7 To log in, type your **User ID** and new **Password**.

8 Click **Go**.

You are logged in to Active Community.

Changing Your User ID

The user ID is a unique identifier assigned to a contact and is used in conjunction with a password to authenticate a user when logging into Active Community. The user ID is automatically created for each new user by the system and must be unique across *all* communities.

The following rules apply:

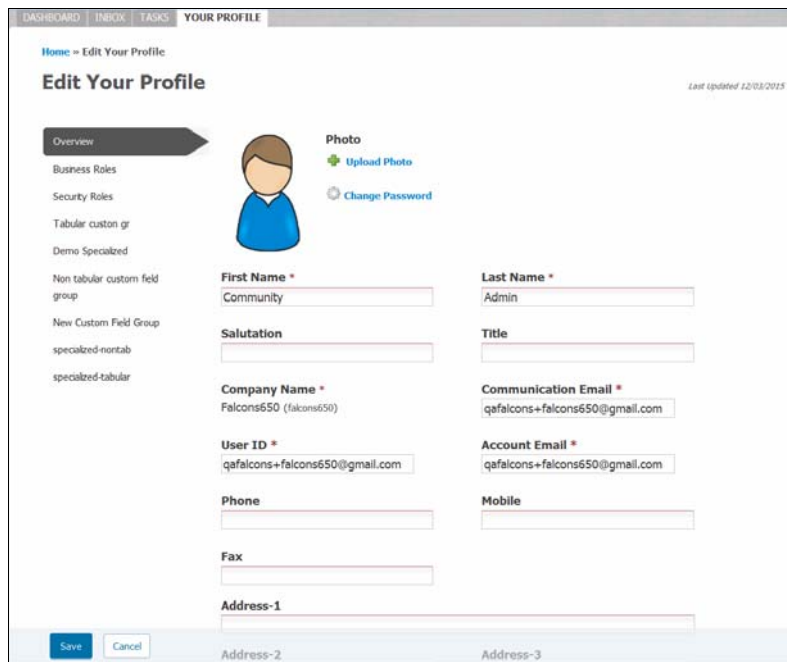
- Community Administrators cannot change a user ID; they can only view it.
- Only the owning user is permitted to change the user ID.
- The owning user can change the user ID to one that already exists only if they have access to both profiles (know the user IDs and passwords of both profiles) See ["Merging User IDs" on page 41](#).

Note: You cannot edit the user ID if the profile is locked for re-registration.

To change your user ID

- 1** On your Home page, click the **Your Profile** tab.
- 2** Click **Edit Profile**.

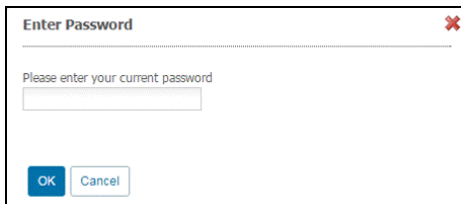
The Edit Profile page opens to the Overview tab. The fields in the profile become editable.



3 Type your new user ID.

4 Click **Save**.

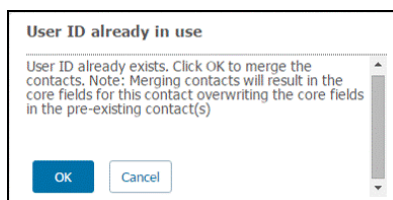
You must re-authenticate your credentials any time you change you user ID. A dialog box asks you to enter your password.



5 Type your password, and click **OK**.

One of the following occurs:

- If the user ID is unique, your user ID is changed and you must log back in to Active Community.
- If the user ID already exists, a dialog box asks if you want to merge the contacts. To merge the user IDs, see ["Merging User IDs" on page 41](#).



The Community Login page opens. You must log back in.

6 To log in, type your **User ID** and **Password**.

7 Click **Go**.

You are logged in to Active Community.

Changing Your Account Email

The Account Email is a private email address used only for account related notifications. It is associated with a contact’s user ID and is used when a contact has forgotten their password. When a user ID is changed or a password is reset, the confirmation email is sent to the Account Email.

To reset your password, see ["Resetting Your Password" on page 4](#).

The following rules apply:

- Community Administrators cannot change an Account Email if the user has already created a password; they can only view it.
- Only the owning user is permitted to change the Account Email.

Important: The following exception exists: If a user has not yet authenticated their profile (created a password), and the Communication Email is changed, the Account Email is automatically changed to match it.

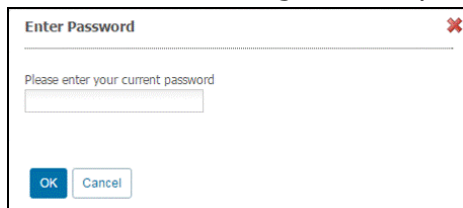
To change your Account Email

- 1 On your Home page, click the **Your Profile** tab.
- 2 Click **Edit Profile**.

The Edit Profile page opens to the Overview tab. The fields in the profile become editable.

- 3 Type your Account Email.
- 4 Click **Save**.

You must re-authenticate your credentials any time you change you user Account Email. A dialog box asks you to enter your password.



5 Type your password, and click **OK**.

Changing the Communication Email

The Communication Email is a public email address that a hub uses to communicate with spoke contacts. Hub or spoke users can change a Communication Email.

This email is used for communications such as:

- Welcome emails
- Message activities for Projects
- Web Form activities for Projects
- Profile Reminder emails

Merging User IDs

You can merge the user IDs of two contact profiles that have different user IDs if you own both user IDs (know the user IDs and passwords of both profiles). After the user IDs are merged, a user needs only one user ID to access both of the spoke company profiles.

For example, John is in a hub community representing two companies with two separate user IDs. He wants to merge the two user IDs so that he only needs to use one user ID to access both of the spoke company profiles.

	User 1 in Spoke 1	User 2 in Spoke 2	Comments
User ID	john@msys.com	john_965@msys.com	Since User 1 was already in the system with the user ID john@msys.com when User 2 was created, the system automatically created a random user ID.
Communication Email	john@msys.com	john@msys.com	
Account Email	john@msys.com	john@msys.com	

To merge user IDs

- 1 Log in with the user ID and password of the profile whose user ID you want to change (in this example, the user ID for User 2, john_965@msys.com). This is the profile whose user ID is extraneous.
- 2 Click **Home > Your Profile** tab.
Your profile page opens.

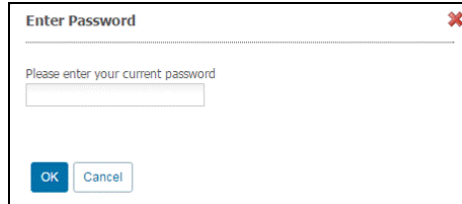
3 Click **Edit Profile**.

The Edit Your Profile page opens.

4 In the User ID field, type the user ID that you want to use (in this example, type the user ID for User 1, john@msys.com).

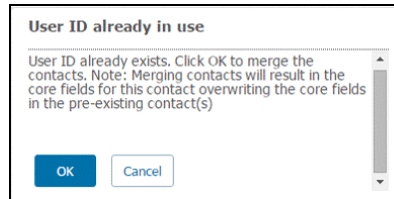
5 Click **Save**.

A dialog box asks you to enter the password for the user ID you wish to use (merge with).



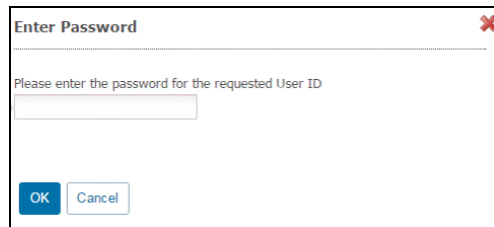
6 Type your password, and click **OK**.

A dialog box indicates that the user ID already exists and asks you to confirm that you want to merge the contacts.



7 Click **OK**.

8 A dialog box asks you to enter the password of the profile whose user ID you want to use.



9 Type the password of the profile whose user ID you want to use (in this example, type the password for User 1).

10 Click **OK**.

The user IDs of the profiles are merged.

One of the following occurs:

- If the two profiles for Spoke 1 and Spoke 2 are in the same community, the core fields are updated so that the core fields of User 2 are now the same as the core fields of User 1 (the core fields within the community are in sync).
- If the two profiles for Spoke 1 and Spoke 2 are in different communities, the Account Email of User 2 is updated to be the same as that of User 1 so that the account fields are in sync. The core fields are not synced. Each spoke community retains the core fields that currently exist for that community.

The Community Login page opens. You must log back in.

- 11** To log in, type your **User ID** and **Password**.
- 12** Click **Go**.
Active Community displays a list of the communities you belong to.
- 13** Click on the link of the community you want to work with.

Profile Update Reminders

Because the information in company and contact profiles can become out-of-date, profile reminder emails can be sent 31 or more days after a profile was last updated. The update status of a profile is referred to as *freshness*.

In addition, reminder emails can be sent based on the freshness of a particular part of the profile, such as contact information or custom field groups. Contacts receive a separate email reminder for each section of the profile.

Note: Reminder emails are sent to a contact's Communication Email. This is the email address that hubs use to communicate with their spokes.

After the initial company or contact reminder email is sent (that is, after the 31 or more days specified as the reminder interval), contacts will receive a daily reminder email that asks them to update their profiles.

The reminder emails will be sent until contacts log in to Active Community and update the information. After that, the reminder emails will not be sent until the next reminder interval is reached (see "[Setting Time Intervals for Profile Reminder Emails](#)" on page 45).

Responding to Reminder Emails

Security permissions: None

You will receive emails that remind you to keep the information in your company or contact profile current. The emails provide a link to Active Community so you can login and update the information. Until you make the requested updates, you will receive daily emails.

Note: Reminder emails are sent to a contact's Communication Email. This is the email address that hubs use to communicate with their spokes.

To respond to reminder emails

- 1** Click the link in the reminder email.
The Active Community login page opens.
- 2** Type your User ID and password, then click **Login**.

- 3 Open the profile and update the requested fields.
- 4 Click **Save**.

Customizing Profile Reminder Messages

Security role: Community Administrator

Security permission: Community > Manage Community

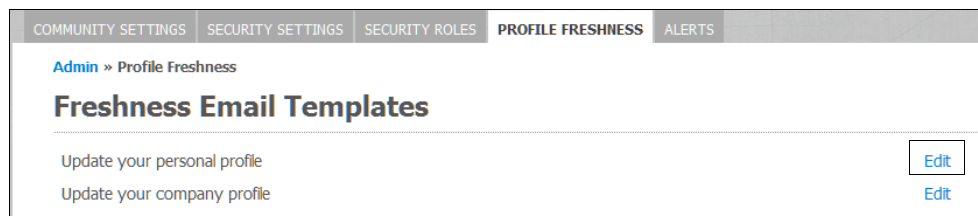
Use this procedure to edit the default reminder email template for companies and contacts. Profile update reminders are community-wide. You cannot select particular companies to receive reminders and others to not receive them.

Important: Updating an email template does not send the email message. It simply saves your changes to the template. Active Community sends the message only after the appropriate number of days has elapsed as described in "[Setting Time Intervals for Profile Reminder Emails](#)" on page 45.

To customize profile reminder messages

- 1 On the Home page, click **Admin**.
- 2 Click the **Profile Freshness** tab.

The Freshness Email Templates page opens. It contains a reminder email template for contact profiles and another for company profiles.



- 3 Click **Edit** for the email template you want to customize.

The Freshness Email Template page opens.

COMMUNITY SETTINGS SECURITY SETTINGS SECURITY ROLES PROFILE FRESHNESS ALERTS

Admin » Profile Freshness

Freshness Email Templates

Edit Freshness Email Template

Email from

Reply to

Subject

Body

```
To complete this task, please click on
the following link:
<a href=%
FreshnessPersonActivityLink%>[Click
Here]</a>
<br />
If you have trouble with the
links in this email, please copy and
paste
the following address into your
browser to complete this
task: %
FreshnessPersonActivityLink%<br />
```

4 (Optional) Enter email addresses in the Email from and Reply to fields.

Note: If you do not provide email addresses, Active Community uses the From and Reply To addresses in the Communications Preferences part of the Community Settings tab (Admin > Community Settings) when it sends emails.

5 Modify the text in the body of the email as appropriate.

6 Click **Update**.

A message indicates the email template updated successfully.

Setting Time Intervals for Profile Reminder Emails

Security role: Community Administrator

Security permissions: Community > Manage Community

Use this procedure to define the interval of time after which Active Community will send profile update reminder emails. The update status of a profile is referred to as *freshness*.

Note: Reminder emails are sent to a contact's Communication Email. This is the email address that hubs use to communicate with their spokes.

A freshness setting is on or off. The setting is:

- On if there is a number in the Interval (days) field
- Off if there is no number in the Interval (days) field

As part of this procedure, you can define different reminders for core fields or custom field groups based on when they were last updated.

Note: After freshness is set, and if the date a profile was last updated is more than the designated number of days, Active Community sends reminder emails *immediately* to contacts who have not updated their profile within the specified time period.

To set profile update reminders

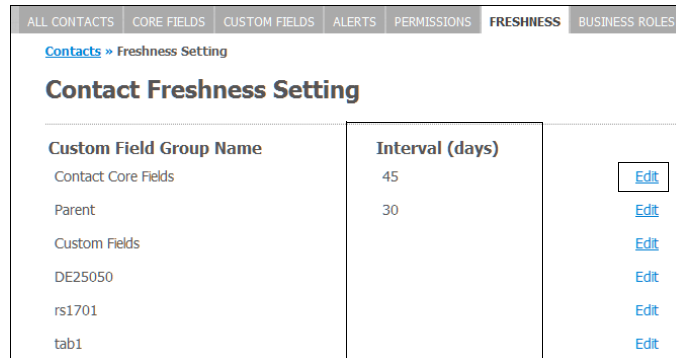
- 1 Click the **Profiles** tab, and then click **Companies** or **Contacts**.

The Contacts (or Company) page opens.

- 2 Perform the appropriate action:

If you clicked...	Do this:
Companies	Click the Settings tab, and then the Freshness link.
Contacts	Click the Freshness tab.

The Contact (or Company) Freshness Setting page opens. The page lets you define the freshness settings for company or contact core fields, as well as for specific custom field groups.

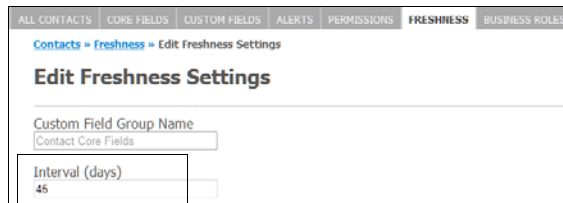


Important: The number of days set for update profile reminder emails is listed in the Interval (days) column.

- If there is a number in the field, the freshness setting is *on*. Reminder emails will be sent at the appropriate interval for that set of fields.
- If there is no number in the field, the freshness setting is *off*. No reminder email will be sent for that set of fields.

- 3 Click **Edit** for the information you want to keep current.

The Edit Freshness Settings page opens.



- 4 In Interval (days), enter the number of days after the last profile update that you want a reminder email to be sent. For example, you enter 45 in the Interval

(days) field for the Contact Core Fields group. If contact core fields in a profile are not updated in 45 days, Active Community automatically sends a profile update reminder email to the profile owner.

5 Click Save.

On the Freshness Setting page, you will see the number of days you set for update reminders.

Discontinuing Profile Reminder Email Messages

Security role: Community Administrator

Security permissions: Community > Manage Community

Use this procedure to discontinue profile update reminders emails for company or contact profiles. Remember, you can choose to discontinue reminders for *all* of a profile or just part of a profile. For example, you might decide to discontinue profile update reminder emails for core fields, such as last name or address, but still send them for a custom field group, such as Role or Specialty.

To discontinue profile update reminders

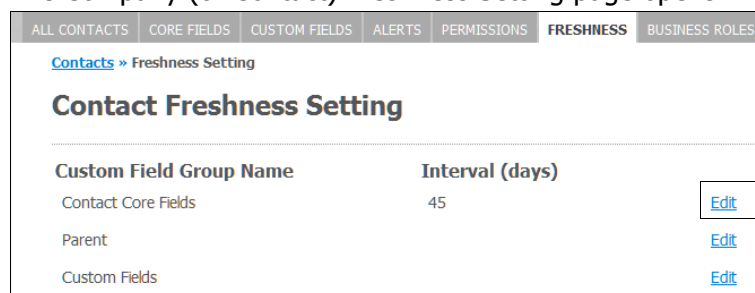
1 Click the **Profiles** tab, and then click **Companies** or **Contacts**.

The Contacts (or Company) page opens.

2 Perform the appropriate action:

If you clicked...	Do this:
Companies	Click the Settings tab, and then the Freshness link.
Contacts	Click the Freshness tab.

The Company (or Contact) Freshness Setting page opens.



3 Click **Edit** for the appropriate field.

The Edit Freshness Settings page opens.

- 4 To turn the reminder setting off, delete the number of days in the Interval (days) box.

ALL CONTACTS	CORE FIELDS	CUSTOM FIELDS	ALERTS	PERMISSIONS	FRESHNESS	BUSINESS ROLES
--------------	-------------	---------------	--------	-------------	------------------	----------------

[Contacts](#) > [Freshness](#) > Edit Freshness Settings

Edit Freshness Settings

Custom Field Group Name

Interval (days)

- 5 Click **Save**.

The freshness setting has been turned *off*. No reminder emails will be sent for that set of fields.

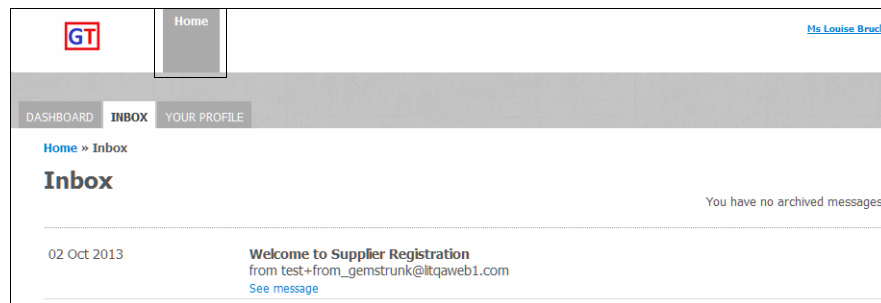
Roles and Permissions

3

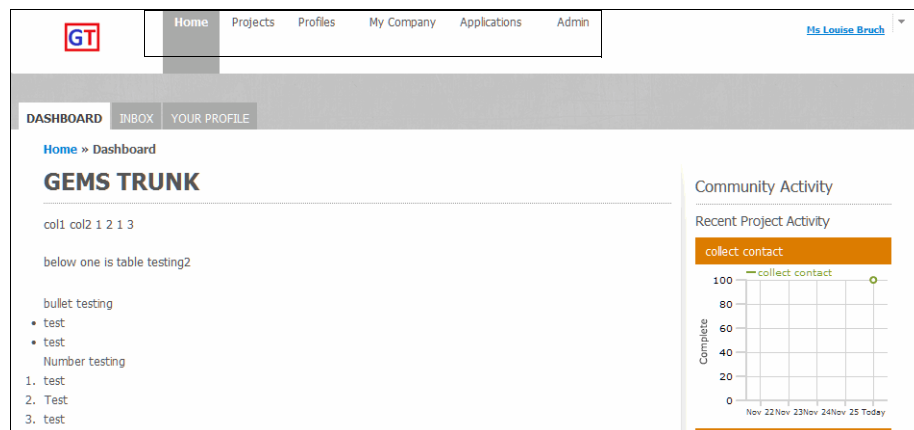
User access to Active Community modules and components is determined by the *roles* that are assigned to a user's contact profile.

Each role is made up of a group of *permissions*. Permissions determine which modules users can access, the components they can use, and the actions they can perform.

- Some roles have limited permissions and limited access to modules and components.



- Other roles have more permissions and greater access to modules and components.



For example, a contact who has a role with limited permissions might only be able to *view* a company profile. A contact who has a role with additional permissions might be able to *edit* a company profile, add an activity to a project, and view a custom field.

By changing the permissions for any role, you change the level of access for all contacts assigned to the role.

Topics include:

- [“Roles and Permissions Overview” on page 50](#)
- [“Working with Security Roles” on page 55](#)
- [“Working with Contact \(Business\) Roles” on page 75](#)
- [“Optional Module Roles” on page 80](#)
- [“Working with Workspace Roles” on page 84](#)
- [“Working with Registration Roles” on page 88](#)

Roles and Permissions Overview

Active Community includes several types of security roles and contact (business) roles. These roles can be assigned to all contact profiles.



Key	Description
1	Security Roles
2	Contact (Business) Roles

While default roles are provided, custom roles can be defined for security and contact roles.

Optional Active Community modules include roles that control a contact’s access to those modules (see [“Optional Module Roles” on page 80](#)).

Overview topics include:

- [“Security Roles and Contact Roles” on page 50](#)
- [“Community Security Roles” on page 51](#)
- [“Project Security Roles” on page 52](#)
- [“Contact \(Business\) Roles” on page 53](#)
- [“General Role Guidelines” on page 54](#)
- [“Default Security and Contact Roles” on page 55](#)

Security Roles and Contact Roles

There are several types of roles: security roles and contact roles.

- *Security roles* control the actions users can perform in a community. Security roles can be grouped into these categories:
 - *Community security roles*—Include permissions related to the community as a whole; for example, the Community Administrator or Everyone role. Default roles are available, and custom roles can be created.

- *Project security roles*—Include permissions related to all projects or permissions for a specific project; for example, the Project Owner or Participant role.

For default role descriptions, see [“Community Security Roles” on page 51](#) and [“Project Security Roles” on page 52](#).

- *Contact (business) roles* describe a contact's functional role in an organization. One default role is provided, Contact (see [“Contact \(Business\) Roles” on page 53](#)).

Community Security Roles

Community security roles include permissions that apply to the community as a whole, such as importing and exporting contacts, adding tags, managing profiles, and adding projects.

Two default roles are provided: the Community Administrator and Everyone roles. Custom security roles can be defined.



Key	Description
1	Security Roles (Community) <ul style="list-style-type: none"> ■ Community Administrator Role (Default) ■ Everyone Role (Default) ■ <i>Custom security roles</i>

The following topics describe the default roles and custom security roles:

- [“Community Administrator Role” on page 51](#)
- [“Everyone Role” on page 52](#)
- [“Custom Security Roles” on page 52](#)

To edit permissions for community security roles and assign roles to contacts, see [“Working with Security Roles” on page 55](#). For a list of available permissions, see [“Security Role Permission Descriptions” on page 57](#).

Community Administrator Role

This role is assigned to the person responsible for setting up and maintaining the community. The role includes *all* permissions, which means contacts with this role can access all parts of Active Community. By default, only contacts with the Community Administrator role can edit the permissions associated with security roles.

In theory, any role can have the same permissions as the Community Administrator role, but only if the Community Administrator assigns all permissions to that role.

Note: Permissions cannot be removed from the Community Administrator role. This safeguard ensures at least one security role has full access to Active Community.

Everyone Role

The Everyone role is the default role for all community members. It is typically used for spoke (vendor) contacts. The Everyone role has the *fewest* permissions, which means it has limited access to Active Community modules and components. Active Community automatically assigns the Everyone role to all contacts added to a community after a contact’s profile has been created.

Custom Security Roles

A contact with the Community Administrator role can create custom security roles for a community and assign permissions to them (see [“Adding a Custom Security Role” on page 65](#)).

Project Security Roles

Project security roles are made up of permissions that apply to specific *projects* within a community. The permissions include the ability to edit a project, maintain project activities, and set project permissions for other roles.



Key	Description
1	Security Roles (Project) <ul style="list-style-type: none"> ■ Project Owner Role (Default) ■ Team Role (Default) ■ Participant Role (Default) ■ Community Administrator Role (Default)

Default project security roles include:

- [“Project Owner Role” on page 52](#)
- [“Team Role” on page 52](#)
- [“Participant Role” on page 53](#)
- [“Community Administrator Role” on page 53](#)

To edit permissions for project security roles and assign roles to contacts, see [“Working with Security Roles” on page 55](#). For a list of available permissions, see [“Project Security Role Permission Descriptions” on page 62](#).

Project Owner Role

Active Community automatically assigns the Project Owner role to a contact after the contact creates a project. The role includes permissions related to starting, editing, and maintaining a project.

Team Role

Active Community automatically assigns the Team role to a contact after a contact in the Project Owner role adds a contact as a team member in the project. A

contact in the Team role helps the Project Owner perform project-related administrative tasks.

Participant Role

Active Community automatically assigns the Participant role to a contact after a contact in the Project Owner role adds a contact as a participant in an activity. A contact in this role provides input and receives communication about project activities.

Community Administrator Role

The Community Administrator role is assigned to the person responsible for setting up and maintaining the community. By default, only contacts in the Community Administrator role can view all projects.

Contact (Business) Roles

A *contact role* is a business function or an area of responsibility for a contact in a company in your community.

Important: No permissions are assigned to contact roles.



Key	Description
1	Contact (Business) Roles <ul style="list-style-type: none"> ■ Contact Role (Default) ■ <i>Custom roles for business functions</i>

Here are sample contact roles:

- Distribution Manager
- Managing Director
- Sales Director
- Operations Supervisor
- Financial Controller
- Primary Contact

One default contact role is provided (see ["Contact Role" on page 54](#)).

Contact Role

Active Community automatically assigns the Contact role to a contact after a contact profile is created. With the appropriate permissions, additional contact (business) roles can be assigned to a contact by editing a contact's profile.

Note: If your community has the Registration module enabled, contact (business) role information can be collected during the company registration process. The roles automatically become part of contact profiles after the company is approved and registered (see ["Registration Setup"](#) on page 423).

General Role Guidelines

The following guidelines apply to security and contact (business) roles:

- Every Active Community user is assigned a security role. Some roles are automatically assigned when performing an action in Active Community.
- Role names can be changed.
- Custom roles can be created.
- Permissions can be assigned to each role.
- When setting up a community, a contact in the Community Administrator role can import and assign security roles to existing contacts when importing contacts using a .csv file. The roles must already exist in Active Community; the import file does not create them (see ["Importing Company or Contact Data"](#) on page 135).

Default Security and Contact Roles

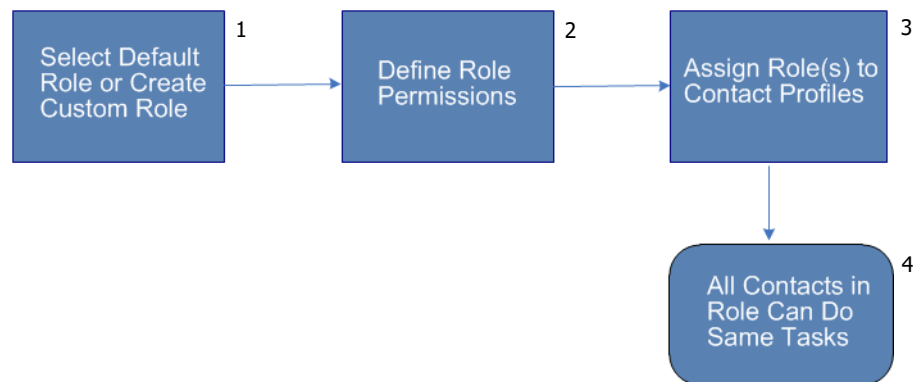
The following default roles are provided for security and contact roles:

- Community security roles:
 - Community Administrator
 - Everyone
- Project security roles:
 - Project Owner
 - Team
 - Participant
 - Community Administrator
- Contact (business) role:
 - Contact

For information about default roles for optional modules, see [“Default Optional Module Roles”](#) on page 83.

Working with Security Roles

The graphic outlines the general process for working with security roles, assigning permissions to each role, and assigning roles to contact profiles.



Key	Description
1	Select Default Role or Create Custom Role
2	Define Role Permissions
3	Assign Role(s) to Contact Profiles
4	All Contacts in Role Can Do Same Tasks

In the procedures, if a check box for a permission is selected, the permission is active for the role. If the check box for a permission is not selected, the permission is not active for the role.

<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>
<input type="checkbox"/>

Topics include:

- ["Editing Permissions for Community Security Roles" on page 56](#)
- ["Editing Permissions for Project Security Roles" on page 60](#)
- ["Assigning Core Company Field Permissions to Security Roles" on page 63](#)
- ["Assigning Custom Field Group Permissions to Security Roles" on page 64](#)
- ["Adding a Custom Security Role" on page 65](#)
- ["Managing Security Role Members Using Business Roles" on page 67](#)
- ["Removing All Members Assigned to a Security Role" on page 71](#)
- ["Assigning a Security Role to a Contact Profile" on page 73](#)

Editing Permissions for Community Security Roles

Security role: Community Administrator

To edit permissions for a community security role

1 Click **Admin**.

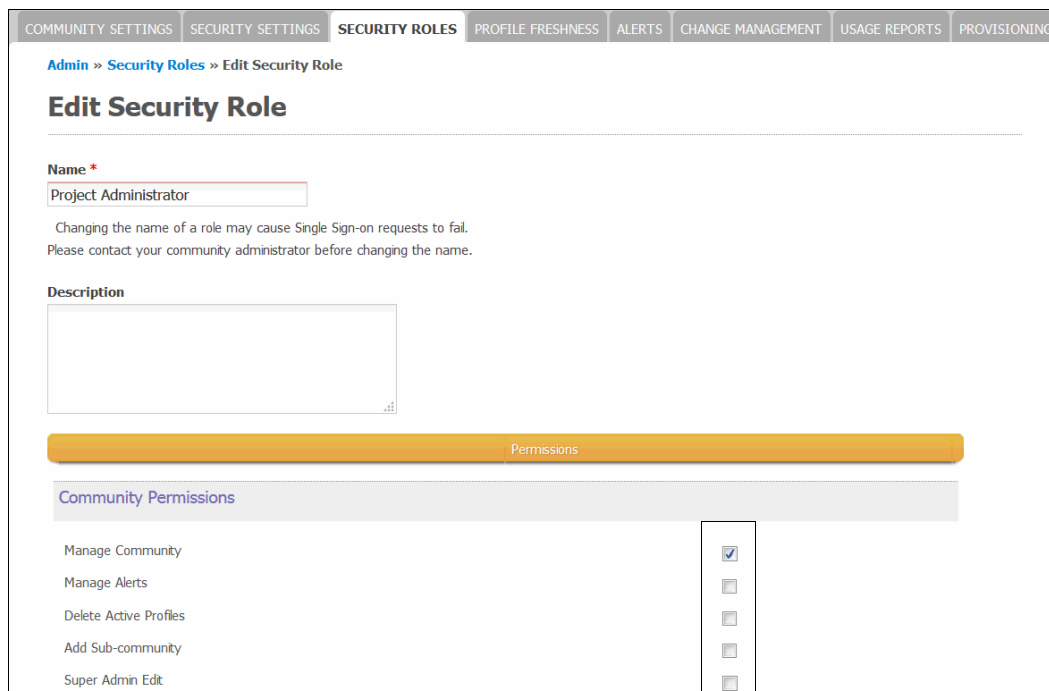
The page opens to the Community Settings tab.

2 Click the **Security Roles** tab.

A list page opens and lists the security roles for the community.

3 Select the name of the security role you want to edit.

The Edit Security Role page opens.



- 4 To add or remove a permission for a security role, select or clear the check box in the Permissions column. For more information, see ["Security Role Permission Descriptions"](#) on page 57.
- 5 Click **Save**.

Security Role Permission Descriptions

Important: A hub should assign most permissions to roles for the hub company. The permissions in the My Company permissions category should be assigned to spokes and the Everyone role.

Use the information in the table as you select or clear the permissions for a community security role.

Select or clear this option...	If you want a role to do this:
Community Permissions—Manage a Community	
<ul style="list-style-type: none"> ■ Manage Community 	<ul style="list-style-type: none"> ■ Manage overall settings of the community by enabling the Admin menu option.
<ul style="list-style-type: none"> ■ Manage Alerts 	<ul style="list-style-type: none"> ■ Manage community alerts
<ul style="list-style-type: none"> ■ Delete Active Profiles 	<ul style="list-style-type: none"> ■ Delete active profiles from a community Note: Delete Active Profiles is the only permission that is not automatically selected for the Community Administrator role.
<ul style="list-style-type: none"> ■ Add Sub-community 	<ul style="list-style-type: none"> ■ Create new sub-communities in the hub community

Select or clear this option...	If you want a role to do this:
<ul style="list-style-type: none"> Super Admin Edit 	<ul style="list-style-type: none"> Edit companies and contacts without being required to enter mandatory custom field information. <p>Note: Does not apply to core fields for integrated communities.</p>
Change Management Permissions—Manage a Change Management Process	
<ul style="list-style-type: none"> Create/Edit/Delete Change Management Process 	<ul style="list-style-type: none"> Manage the review process which requires approval or rejection of requested changes to selected company custom fields.
Sub-Community Permissions—Manage a Sub-community	
<ul style="list-style-type: none"> Manage Sub-communities 	<ul style="list-style-type: none"> Manage and edit the properties of a sub-community
<ul style="list-style-type: none"> Add Companies 	<ul style="list-style-type: none"> Add companies to sub-communities
<ul style="list-style-type: none"> Edit Companies 	<ul style="list-style-type: none"> Edit companies in a sub-community
<ul style="list-style-type: none"> Delete Inactive Companies 	<ul style="list-style-type: none"> Delete inactive companies from a sub-community
<ul style="list-style-type: none"> View Companies 	<ul style="list-style-type: none"> View companies in a sub-community
<ul style="list-style-type: none"> Import Companies 	<ul style="list-style-type: none"> Import companies to a sub-community
<ul style="list-style-type: none"> Enable Companies 	<ul style="list-style-type: none"> Enable companies in a sub-community
<ul style="list-style-type: none"> Disable Companies 	<ul style="list-style-type: none"> Disable companies in a sub-community
<ul style="list-style-type: none"> Export Companies/Reports 	<ul style="list-style-type: none"> Export company profile data and run reports
Company Permissions—Manage Companies in a Community	
<ul style="list-style-type: none"> Add Companies 	<ul style="list-style-type: none"> Add companies to a community
<ul style="list-style-type: none"> Edit Companies 	<ul style="list-style-type: none"> Edit companies in a community
<ul style="list-style-type: none"> Delete Inactive Companies 	<ul style="list-style-type: none"> Delete inactive companies from a community
<ul style="list-style-type: none"> View Companies 	<ul style="list-style-type: none"> View companies in a community
<ul style="list-style-type: none"> Import Companies 	<ul style="list-style-type: none"> Import companies to a community
<ul style="list-style-type: none"> Enable Companies 	<ul style="list-style-type: none"> Enable companies in a community
<ul style="list-style-type: none"> Disable Companies 	<ul style="list-style-type: none"> Disable companies in a community
<ul style="list-style-type: none"> Manage Alerts 	<ul style="list-style-type: none"> Manage company alerts
<ul style="list-style-type: none"> Export Companies/Reports 	<ul style="list-style-type: none"> Export company profile data and run reports
<ul style="list-style-type: none"> View Audit Log 	<ul style="list-style-type: none"> View audit information about a company
My Company Permissions—Manage Spoke Companies (These permissions should be assigned to the spoke or Everyone role)	
<ul style="list-style-type: none"> Edit My Company 	<ul style="list-style-type: none"> Edit My Company profile
<ul style="list-style-type: none"> View My Company 	<ul style="list-style-type: none"> View information about my company, including masked fields
<ul style="list-style-type: none"> Add My Company Contacts 	<ul style="list-style-type: none"> Add contacts for my company
<ul style="list-style-type: none"> Edit My Company Contacts 	<ul style="list-style-type: none"> Edit contacts in my company
<ul style="list-style-type: none"> Export My Company Contacts 	<ul style="list-style-type: none"> Export my company's contacts
<ul style="list-style-type: none"> Edit My Company Divisions 	<ul style="list-style-type: none"> Edit information in any of the divisions of a parent company
<ul style="list-style-type: none"> Delete My Company Contacts 	<ul style="list-style-type: none"> Delete contacts from my company
<ul style="list-style-type: none"> View My Company Contacts 	<ul style="list-style-type: none"> View contacts in my company

Select or clear this option...	If you want a role to do this:
<ul style="list-style-type: none"> ■ Enable My Company Contacts ■ Disable My Company Contacts 	<ul style="list-style-type: none"> ■ Enable contacts in my company ■ Disable contacts in my company
Custom Field Permissions—Categorize Information about Companies and Contacts	
<ul style="list-style-type: none"> ■ Manage Custom Fields ■ View Masked Fields 	<ul style="list-style-type: none"> ■ Define custom field permissions ■ View data in fields outside my company when data masking is enabled for those fields.
Company Core Field Permissions—Manage Basic Company Information	
<ul style="list-style-type: none"> ■ Manage Company Core Fields 	<ul style="list-style-type: none"> ■ Define core field permission
Contact Permissions—Manage Contacts	
<ul style="list-style-type: none"> ■ Add Contacts ■ Edit Contacts ■ Delete Inactive Contacts ■ View Contacts ■ Import Contacts ■ Enable Contacts ■ Disable Contacts ■ Manage Alerts ■ View Hub Company Contacts ■ Export Contacts ■ View Audit Log 	<ul style="list-style-type: none"> ■ Add contacts to a community ■ Edit contacts in a community ■ Delete inactive contacts in a community ■ View contacts in a community ■ Import contacts to a community ■ Enable contacts in a community ■ Disable contacts in a community ■ Manage contact alerts ■ View hub company contacts ■ Export contact profile data ■ View audit information about a contact
File Library Permissions—Manage Company Files and Folders	
<ul style="list-style-type: none"> ■ View Files and Folders ■ Add Folders ■ Edit Folders ■ Delete Folders ■ Add Files ■ Delete Files 	<ul style="list-style-type: none"> ■ View files and folders in the Files tab in a company profile ■ Add new folders to the Files tab in a company profile ■ Edit folders in the Files tab in a company profile ■ Delete existing folders in the Files tab in a company profile ■ Add files to a folder in the Files tab in a company profile ■ Delete files in a folder in the Files tab in a company profile
Public Report Permissions—Create Public Searches and Reports	
<ul style="list-style-type: none"> ■ Create Public Exports/Reports ■ Create Public Searches 	<ul style="list-style-type: none"> ■ Create a public report ■ Create public searches
Item Permissions (Item Management module only)	
<ul style="list-style-type: none"> ■ View Items ■ Add Items ■ Edit Items ■ Delete Items ■ Enable Items 	<ul style="list-style-type: none"> ■ View item profiles ■ Add item profiles ■ Edit item profiles ■ Delete item profiles ■ Enable item profiles

Select or clear this option...	If you want a role to do this:
■ Disable Items	■ Disable item profiles
■ View My Items	■ View item profiles I created
■ Add My Items	■ Add my item profiles
■ Edit My Items	■ Edit my item profiles
■ Delete My Items	■ Delete my item profiles
■ Enable My Items	■ Enable my item profiles
■ Disable My Items	■ Disable my item profiles
■ Export Items	■ Export item profiles
Project Permissions—Manage Projects in a Community	
■ Add Projects	■ Add a project to a community
■ View Projects	■ View the Project tab. Contacts can view projects in which they are included. By default, a contact in the Community Administrator role can view all projects.
Tag Permissions—Manage Keyword Tags	
■ View Tags	■ View keyword tags
■ Update Tags	■ Update keyword tags
Workspace Permissions (Workspace module only)	
■ View Workspace	■ View a workspace
■ Edit Workspace	■ Edit a workspace

Editing Permissions for Project Security Roles

Security role: Community Administrator

Use this procedure to edit role permissions for new and specific projects.

To edit permissions for project security roles

- 1 Click **Projects**.

The Projects list page opens to the All Projects tab.

2 Perform the appropriate action:

To edit permissions for...	Do this:
New projects	<ul style="list-style-type: none"> Click the Default Project Permissions tab.
A specific project	<ul style="list-style-type: none"> Select the project for which you want to edit permissions, then click the Permissions tab.

Either the Default Permissions for New Projects or Permissions for Roles in the Project (shown) page opens. Project-related security roles are listed across the top of the page.

3 To add or remove a permission for a project security role, select or clear the check box in the Permissions column. For more information, see [“Project Security Role Permission Descriptions”](#) on page 62.

4 Click **Save**.

Project Security Role Permission Descriptions

Use the information in the table as you select or clear the permissions for a project security role.

Select or clear this option...	If you want a role to do this:
Projects	
■ Edit Projects	■ Edit projects
■ Delete Projects	■ Delete projects
■ View Projects	■ View projects
■ Add Participants	■ Add participants to a project
■ Delete Participants	■ Delete participants from a project
■ Edit Participants	■ Edit participants in a project
■ Delete Participants	■ Delete participants from a project
■ View Project Permissions	■ View project permission settings
■ Update Project Permissions.	■ Update project permission settings
■ Add Files	■ Add project-related files
■ Edit Files	■ Edit project-related files
■ Delete Files	■ Delete project-related files
■ View Files	■ View project-related files
■ Add Web Forms	■ Add web forms to gather survey data
■ Edit Web Forms	■ Edit existing web forms
■ Publish Web Forms	■ Publish web forms to contacts in a community
■ Delete Web Forms	■ Delete web forms
■ View Web Forms	■ View web forms
■ Export Web Form Results	■ Export the results of web form surveys
■ Add Activities	■ Add project activities
■ Edit Activities	■ Edit project activities
■ View Activities	■ View project activities
■ Delete Activities	■ Delete project activities
■ Start Activities	■ Start project activities
■ Stop Activities	■ Stop project activities
■ Suspend Activities	■ Suspend project activities
■ Reopen Activities	■ Reopen project activities

Assigning Core Company Field Permissions to Security Roles

Security role: Community Administrator

Security permission: Company Core Field Permissions > Manage Company Core Fields

To define core company field permissions for a security role

- 1 Click **Profiles > Companies > Settings** tab.
- 2 Click the **Core Field Permissions** link.

The Edit Core Field Permissions page opens. Security roles are listed across the top of the page. Core company fields are listed down the side of the page.

	Everyone	Comm Admin	Project Owner	Team	Participant	Everyone	Comm Admin	Project Owner	Team	Everyone	Comm Admin	Project
Company Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parent Company ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Website url	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State / Province / Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Postal Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
# Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 To add or remove permission to view a company core field for a security role, select or clear the check box (see "Company Core Field Permissions" on page 63).

4 Click **Save**.

Company Core Field Permissions

Permissions to view or not to view company core fields can be defined for each security role. Company core fields include:

- Company Name
- Company ID
- Parent Company ID
- Website URL
- Email
- Phone
- Fax
- Address-1
- Address-2
- Address-3
- City
- State/Province/Region
- Postal Code
- Country
- # Employees
- Notes

Assigning Custom Field Group Permissions to Security Roles

Security role: Community Administrator

Security permission: Custom Field Permissions > Manage Custom Fields

Use this procedure to control which security roles can view or edit a custom field group (or individual fields within a group) in company and contact profiles.

Note:

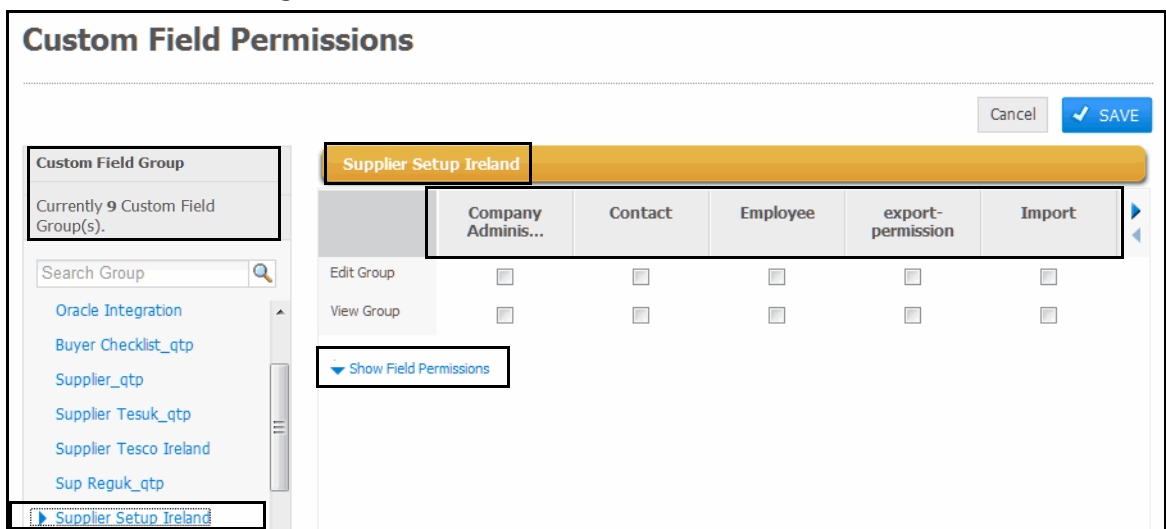
- A *custom field* is a question or input field that allows the community owner to gather and keep key information about its trading partners, customers, sales reps, or other contacts in a community.
- A *custom field group* is a tab in a community member's profile. The tab contains custom fields. For example, a custom field group might display as a tab called Company Information. In the tab, it might include a custom field called Specialty where contacts can select a check box to indicate their specialty.

To assign custom field group permissions for a security role

- 1 Perform the appropriate action:

To define custom field permissions for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. The Companies list page opens. 2 Click the Settings tab > Custom Fields Permissions link.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. The Contacts list page opens. 2 Click the Permissions tab.

The Custom Field Permissions page opens. Custom field groups are displayed in the Custom Field Group column. Security role names are listed in the column headings.



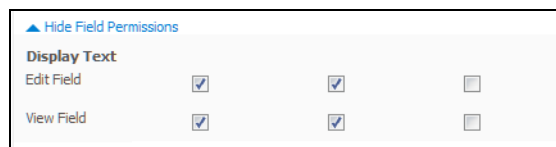
- 2 Select the custom field group for which you want to assign permissions.

The selected custom field group name displays.

- 3 For the appropriate security role column, select or clear the check boxes for Edit Group or View Group. Use the arrows following the column headings to display additional sets of security roles.

Important: If you clear the View Group permission for a custom field group, Active Community does *not* display all custom fields in that group in the following areas.

- Contact or company profiles
 - Custom fields available to be copied on a web form or imported or exported
 - Custom fields available using Advanced Search
- 4 To specify permissions for fields within the selected custom field group, click the **Show Field Permissions** link.



- 5 For a particular security role, select or clear the check boxes for Edit Field or View Field.
- 6 To close field permissions, click the **Hide Field Permissions** link.
- 7 Click **Save**.

You have defined which security roles can view or edit custom field groups in company and contact profiles. Your settings control which custom fields users can view if they have been assigned this security role.

Adding a Custom Security Role

Security role: Community Administrator

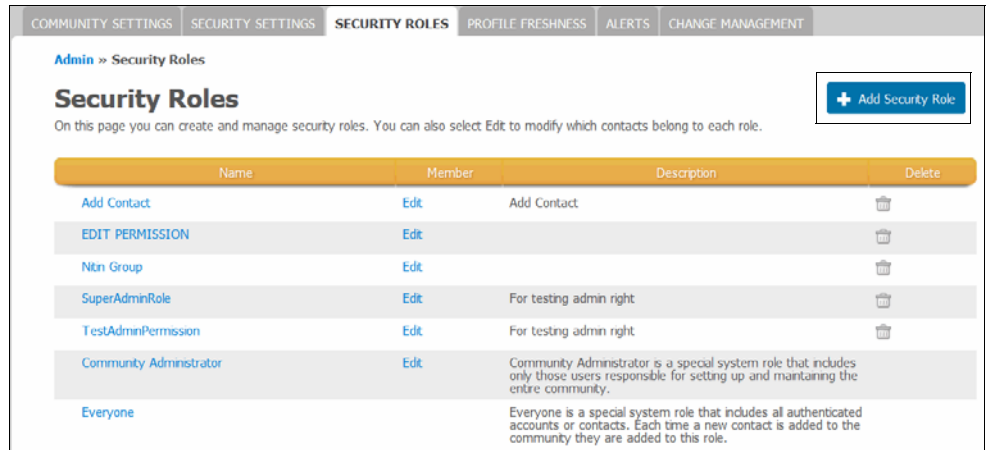
Security permission: Community Permissions > Manage Community

Use this procedure to create a custom security role and assign it to contact profiles.

To add a custom security role and assign it to contact profiles

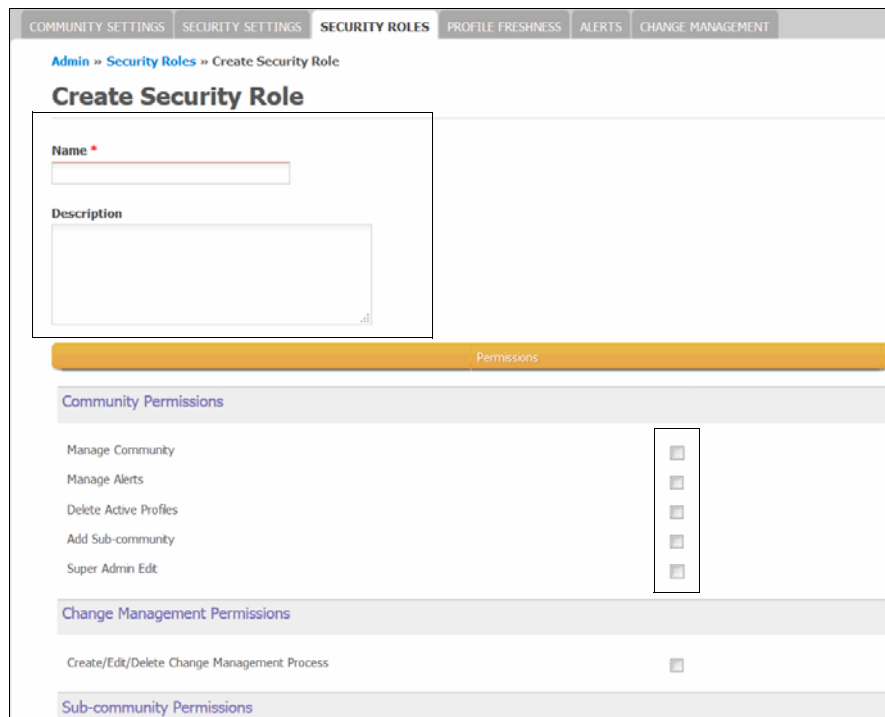
- 1 Click **Admin** > **Security Roles** tab.

A list page opens and lists the security roles for the community.



2 Click **Add Security Role**.

The Create Security Role page opens.

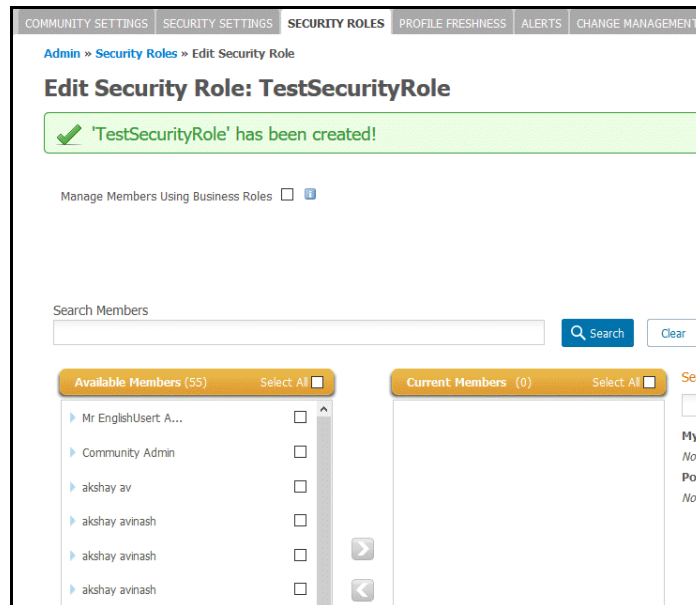


3 In Name and Description, type the name and description of the new role.

4 In the Permission column, select the check boxes for the permissions you want to assign to the role (see "Security Role Permission Descriptions" on page 57).

5 Click **Continue**.

A message indicates the role has been created. The Available Contacts column lists Contacts that can be assigned to the new role.



6 Do one of the following:

- To assign members to the security role using a business role, go to step 3 in [“Managing Security Role Members Using Business Roles”](#) on page 67.
- To assign members to the security role manually, select the contacts to whom you want to assign the new role from the Available Members column and click the arrow between the columns that points to the Current Members column.

The contact’s name moves to the Current Members column.

Note: If needed, in Search Members, type the name of the contact to whom you want to assign the role, then click **Search**.

7 Click **Done**.

You have created a new security role and assigned the role to contacts.

Managing Security Role Members Using Business Roles

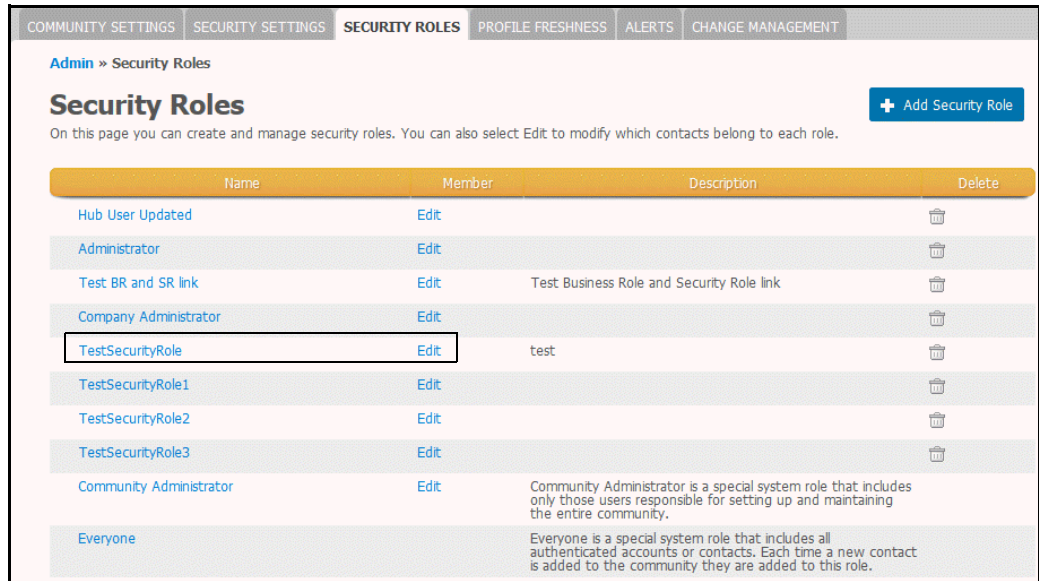
You can automatically assign members to a security role using a business role if you link the security role to the business role.

Note: If the security role has members who were manually assigned to it, you must manually remove all members from the security role before proceeding. See [“Removing All Members Assigned to a Security Role”](#) on page 71.

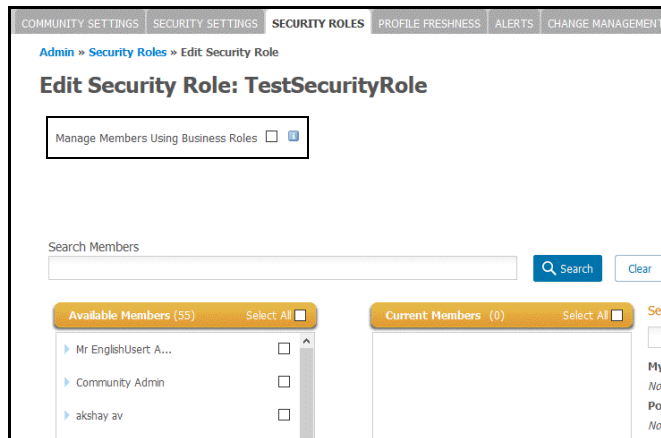
To manage security role members using a business role

- 1** Click **Admin > Security Roles** tab.

A list page opens and lists the security roles for the community.

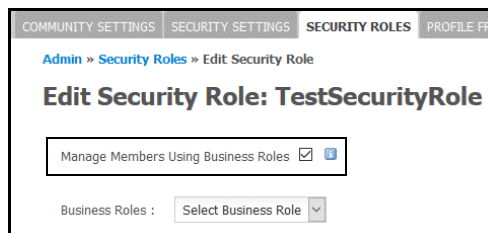


- 2 Click **Edit** for the security role you want to edit, for example TestSecurityRole. The Edit Security Role page opens.



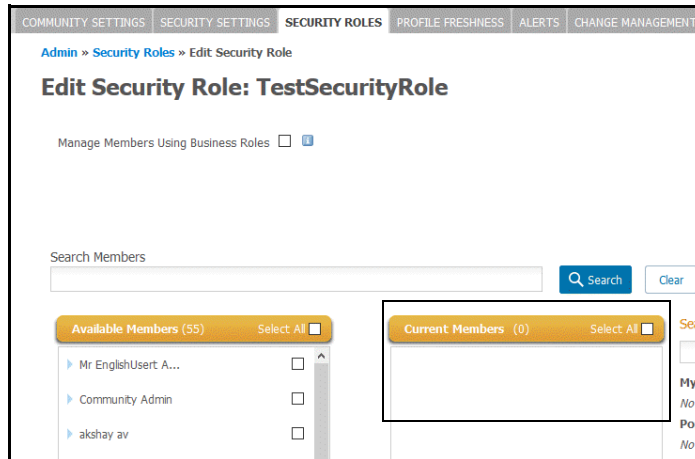
- 3 Click the **Manage Members Using Business Roles** check box. The Business Roles drop-down list displays.

Note: The check box is unavailable until there are no members in the “Current Members” column. If there are any current members that have been *manually* assigned to this security role, you must remove them before assigning members using a business role. See [“Removing All Members Assigned to a Security Role” on page 71.](#)

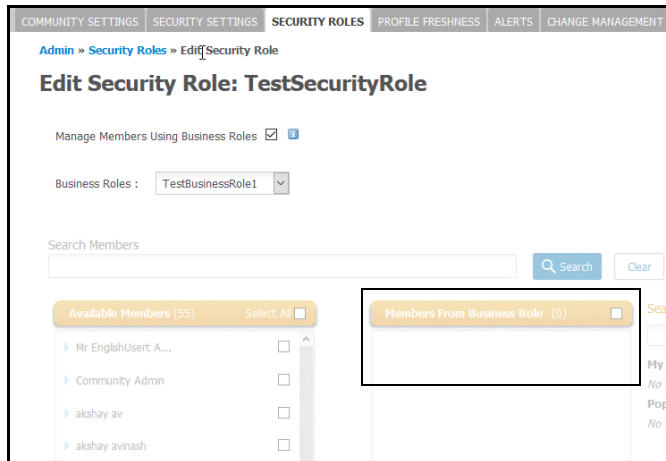


After you select the **Manage Members Using Business Roles** check box, the column header changes from “Current Members” to “Members From Business Role.”

Note: You cannot manually add or remove members from this column. “Current Members” column header.

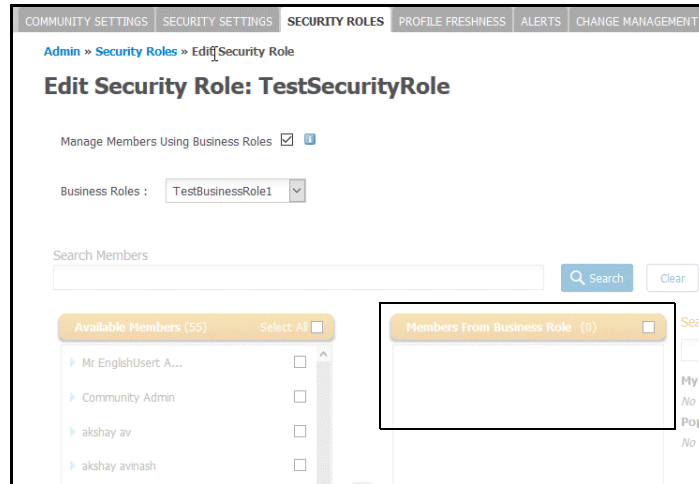


“Members From Business Role” column header.



- From the Business Roles drop-down list, select the business role whose members you want to assign to this security role.

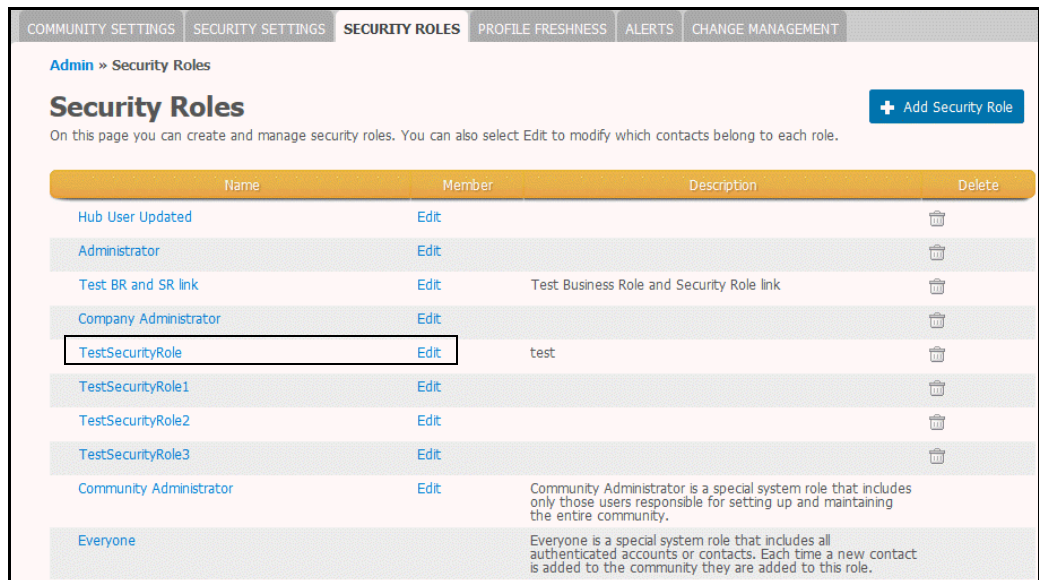
Note: The “Members From Business Role” column is empty the first time you select a business role from the drop-down list. After you click Done, the members are added and you see them the next time you view this page.



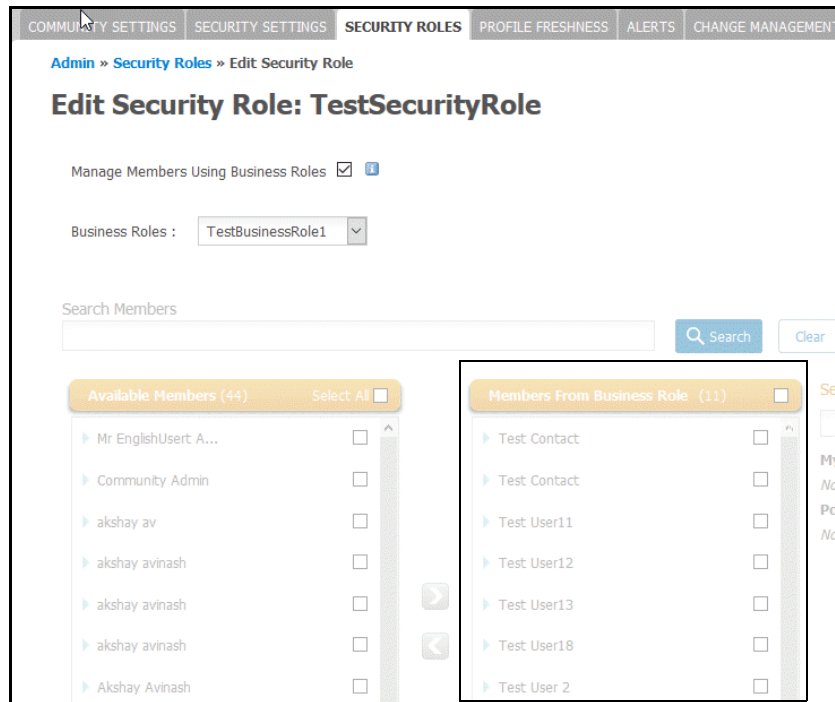
- Click **Done**.

You are returned to the Security Roles list screen.

- If you want to view the members of the business role that have been assigned to the security role, on the list page, click **Edit** for the security role you just edited.



The members display in the Members from Business Role column.



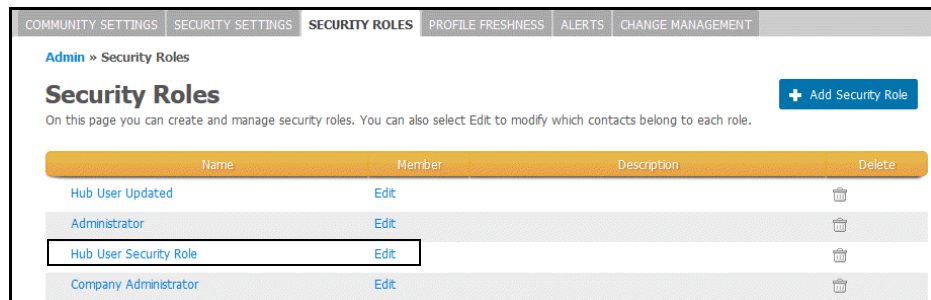
Removing All Members Assigned to a Security Role

To use the option to assign members to a security role using a business role, you need to ensure that members who were previously *manually* assigned to the security role are removed.

To remove all members assigned to a security role:

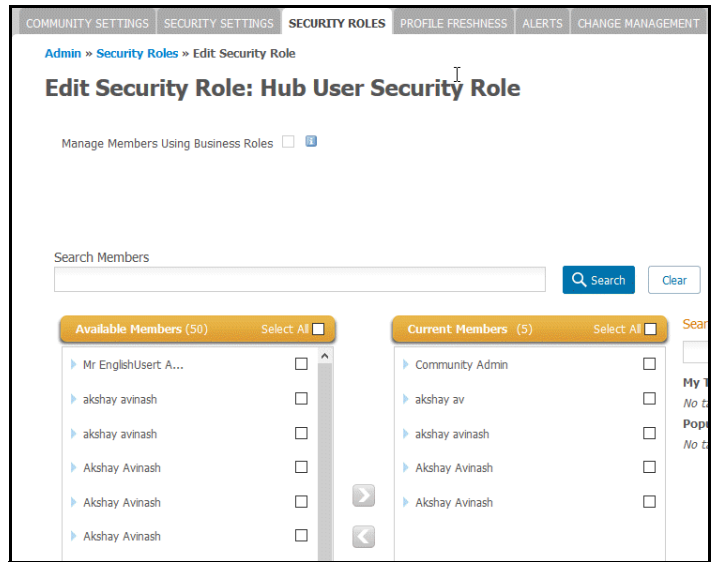
- 1 Click **Admin > Security Roles** tab.

A list page opens and lists the security roles for the community.

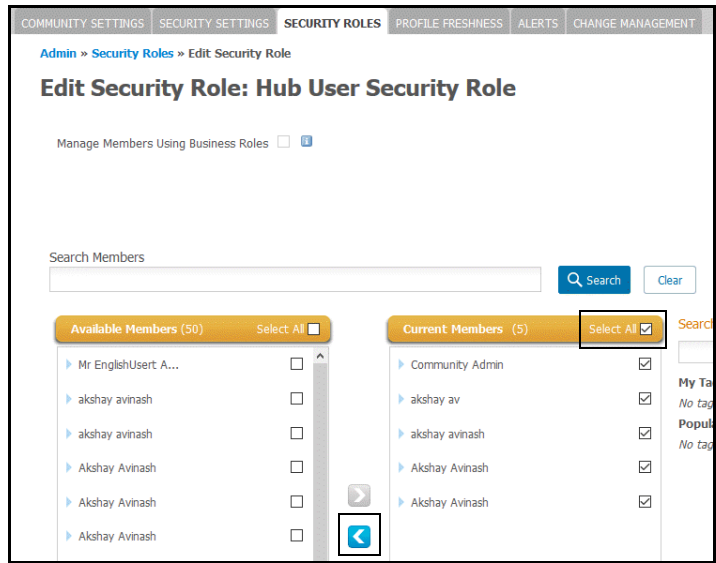


- 2 Click **Edit** for the security role you want to edit, for example "Hub User Security Role."

The Edit Security Role page opens.



- 3 Use the **Select All** check box in the “Current Members” column header to select all members.



- 4 Click the arrow between the columns that points to the “Available Members” column.
All members are moved from the “Current Members” column to the members “Available Members” column, leaving the “Current Members” column empty.
The **Manage Members Using Business Roles** check box is now enabled.
- 5 You can now select this check box to assign members to this security role using a business role. See [“Managing Security Role Members Using Business Roles” on page 67](#)
- 6 Click **Done**.
You are returned to the Security Roles list page.

Assigning a Security Role to a Contact Profile

Security permissions:

- Contact Permissions > Edit Contacts

or

- My Company Permissions > Edit My Company Contacts

Use this procedure to assign one or more security role(s) to a contact by editing a contact's profile. You can also click **Admin > Security Roles** tab. Under the Members column on the list page, click **Edit**, then search for members to assign to a security role.

Important: When setting up a community, a contact in the Community Administrator role can import and assign security roles to existing contacts using a .csv file. Security roles must already exist. They cannot be created using the import file. In addition, follow the guidelines in "[Contact Requirements for Importing Data](#)" on page 131 so the import file does not overwrite existing roles.

To assign a security role to a contact profile

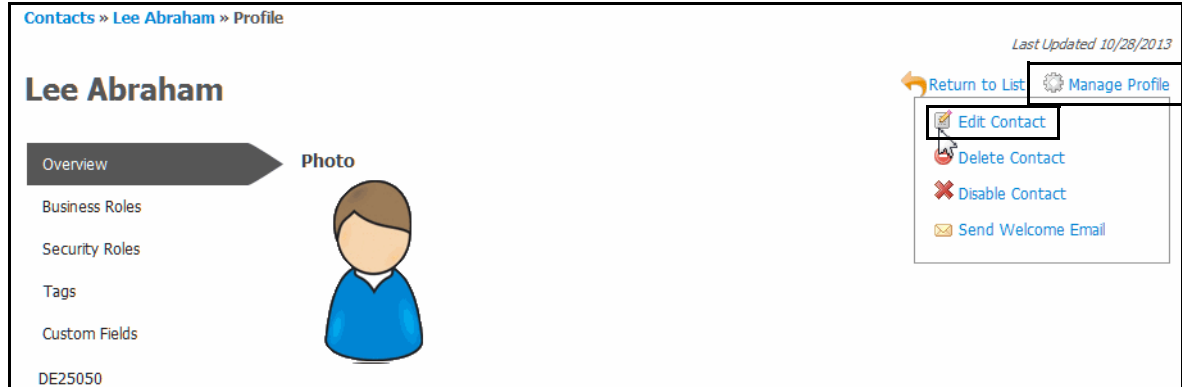
- 1 Click **Profiles > Contacts**.

The Contacts list page opens.

- 2 Use the search options to find the contact you want (see [Chapter 4, "Find Information"](#)).

- 3 Select the name of the contact to whom you want to assign a security role.

The Contact Profile page opens to the Overview tab.



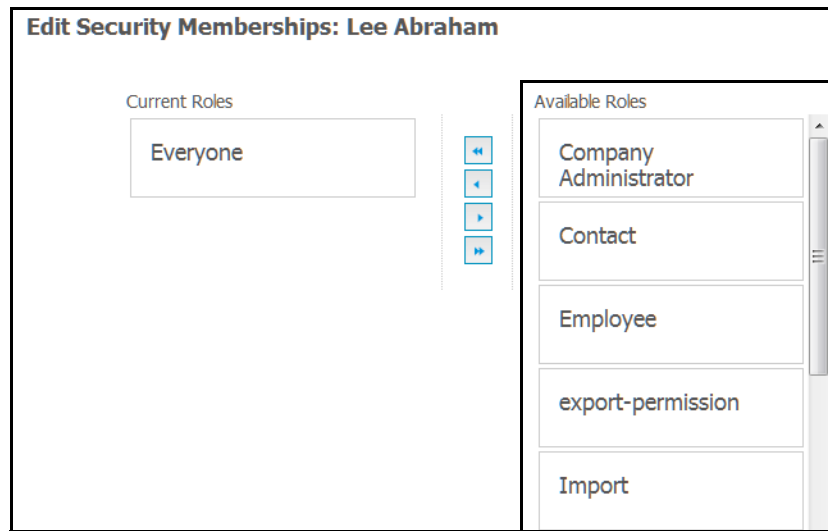
- 4 Click **Manage Profile > Edit Contact**.

The Editing Contact Profile page opens.



- 5 Click **Security Roles**, then select the **Active Community** link.

The Edit Security Memberships page opens for the selected contact. It lists the contact's current security roles as well as the available security roles.

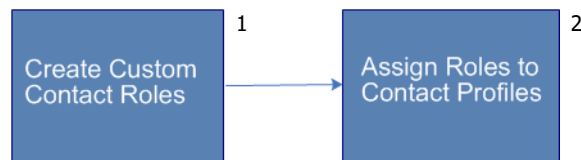


- 6 To assign additional security roles to the contact, select one or more available security roles and use the arrow keys in the center of the page to move the selected roles to the Current Roles column.
- 7 Click **Done**.

The selected security roles are now assigned to the contact.

Working with Contact (Business) Roles

The graphic outlines the general process for working with contact roles and assigning them to contact profiles.



Key	Description
1	Create Custom Contact Roles
2	Assign Roles to Contact Profiles

Active Community automatically assigns the default Contact role to a contact after a contact profile is created. Additional contact (business) roles can be created to categorize business functions within a community.

Important: Permissions are not assigned to contact roles.

Topics include:

- ["Adding a Contact \(Business\) Role" on page 75](#)
- ["Assigning a Contact \(Business\) Role to a Contact Profile" on page 76](#)
- ["Editing the Name and Description of a Contact \(Business\) Role" on page 79](#)
- ["Deleting a Contact \(Business\) Role" on page 80](#)

Adding a Contact (Business) Role

Security role: Community Administrator

Use this procedure to create roles that indicate a contact's business functions in their organization. Business roles can be configured as hub-only business roles for scenarios where it is necessary to have business roles assigned for hub use only.

To add a contact (business) role

- 1 Click **Profiles** > **Contacts** > **Business Roles** tab.

The Manage Business Roles page opens.

Manage Business Roles

To add a role, click Add Business Role. To edit a role, click the role name.

[+ Add Business Role](#)

24 Contact Roles (Showing 1-10 of 24)

View by: Role Description	Hub Role		« Previous	Next »
Business Role 1		Description: Create Business Role 1	8 Contacts 2 Requests 4 Web Forms	⊖
Business Role 2		Description: Created for testing	6 Contacts 1 Request 2 Web Forms	⊖
Business Role 3		Description: Created for testing	7 Contacts 2 Requests 2 Web Forms	⊖
Change management	✓	Description: cM approval	2 Contacts 0 Requests 1 Web Form	⊖
Contact		Description: Contact	181 Contacts 62 Requests 5 Web Forms	⊖
Default Business Role		Description: Default Business Role	1 Contact 0 Requests 0 Web Forms	⊖
Finance Approver	✓	Description: This role approves the finance related field updates	0 Contacts 0 Requests 0 Web Forms	⊖

2 Click Add Business Role.

Additional fields display at the top of the page.

Manage Business Roles

Enter the role name and description and click Save.

Role Name *

For Internal Hub use only

Description *

[SAVE](#) [Cancel](#)

3 In Role Name, type the name of the role; for example, "Controller."

4 In Description, type information about the role, such as the department or a description of the role abbreviation.

5 To configure this business role for hub use only, select the **For Internal Hub use only** check box. If selected, the role is visible to hub contacts only.

Note: Hub-only business roles do not display under registration settings. (**Registration > Admin > Registration Settings**)

6 Click **Save**.

You can now assign the contact (business) role to a contact.

7 Go to ["Assigning a Contact \(Business\) Role to a Contact Profile"](#) on page 76.

Assigning a Contact (Business) Role to a Contact Profile

Security role: Community Administrator

Use this procedure to assign multiple contact (business) roles to a contact. You must define contact roles before they can be assigned (see “Adding a Contact (Business) Role” on page 75). Active Community automatically assigns the default Contact role to a contact after a contact profile is created.

Note: When setting up a community, a contact in the Community Administrator role can import and assign contact roles to existing contacts when using a .csv file. Be sure to include a Role column in the import file. The column should specify the roles you want to assign to each contact. In addition, follow the guidelines in “Contact Requirements for Importing Data” on page 131 so the import file does not overwrite existing roles.

To assign a contact (business) role to a contact profile

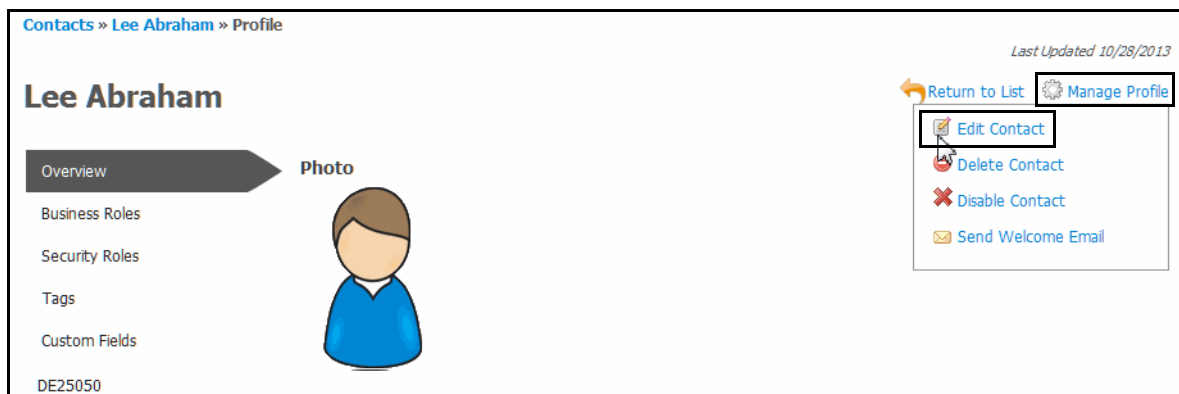
1 Click **Profiles > Contacts**.

The Contacts list page opens.

2 Use the search options to find the contact you want (see Chapter 4, “Find Information”).

3 Select the name of the contact to whom you want to assign one or more contact roles.

The Contact Profile page opens to the Overview tab.

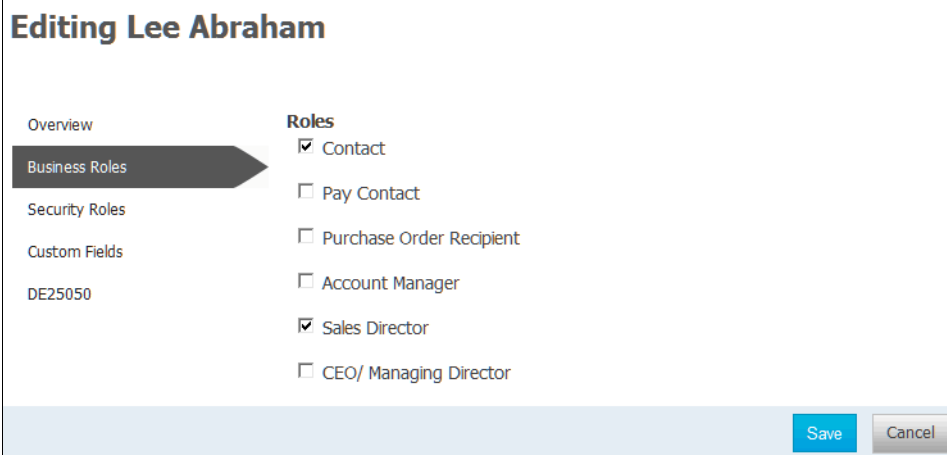


4 Click **Manage Profile > Edit Contact**.

The Edit Contact Profile page opens.

5 Click the **Business Roles** tab.

The available contact (business) roles display.



Editing Lee Abraham

Overview
Business Roles
Security Roles
Custom Fields
DE25050

Roles

- Contact
- Pay Contact
- Purchase Order Recipient
- Account Manager
- Sales Director
- CEO/ Managing Director

Save Cancel

6 Select or clear the check boxes for the role(s) you want to assign to the contact.

7 Click **Save**.

The selected business roles are now included in the contact's profile.

Editing the Name and Description of a Contact (Business) Role

Security role: Community Administrator

Use this procedure to change the name and description of a contact role. After completing this procedure, your changes are reflected in all contact profiles assigned to the contact role.

To change the name and description of a contact (business) role

- 1 Click **Profiles > Contacts > Business Roles** tab.

The Manage Business Roles list page opens.

- 2 Click anywhere in the row of the role you want to change.

The page refreshes with fields at the top of the page.

- 3 In Role Name, change the name of the role.

- 4 In Description, change information about the role.

5 Click Save.

The name and description of the contact role is updated. Updates are reflected in all contact profiles to whom the role has been assigned.

Deleting a Contact (Business) Role

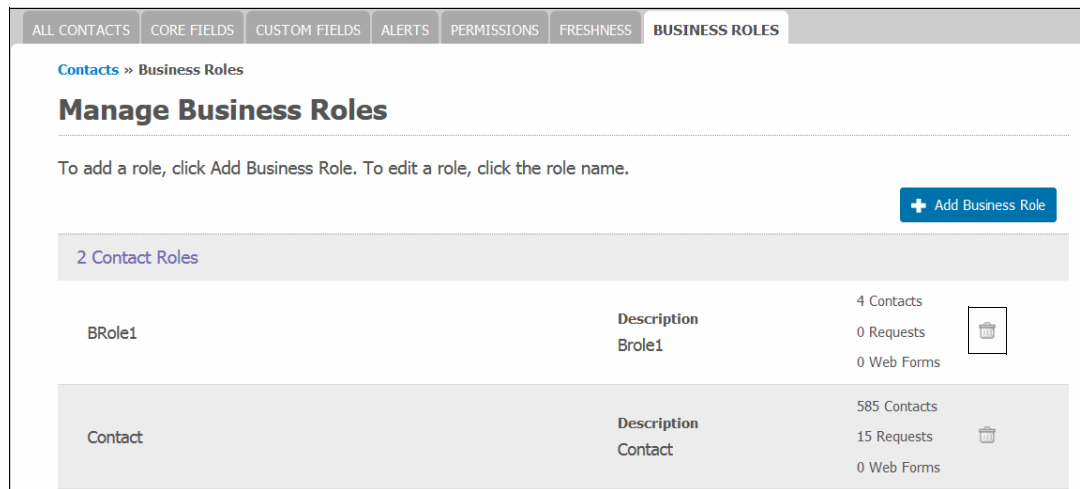
Security role: Community Administrator

Use this procedure to delete a contact (business) role. You cannot delete a role if it has been assigned to one or more contacts.

To delete a contact role

- 1 Click **Profiles > Contacts > Business Roles** tab.

The Manage Business Roles page opens.



- 2 For the role you want to delete, click the **Remove Role** icon.

A dialog box opens and asks if you really want to delete the role.

- 3 Click **Delete**.

As long as the role has not been assigned to a contact, the role is deleted.

Optional Module Roles

Some roles are associated with optional Active Community modules, including the Workspace and Registration modules.



Key Description

- 1 Optional Modules
 - Workspace
 - Registration

Optional module roles include:

- *Workspace roles*—Control the amount of access a contact has in a specific workspace.
- *Registration roles*—Control which contacts can perform actions on registration requests during the request approval process. Registration module only.

Overview topics include:

- “Workspace Roles” on page 81
- “Registration Roles and Contacts” on page 82
- “General Optional Module Role Guidelines” on page 83
- “Default Optional Module Roles” on page 83

Workspace Roles

Important: The optional Workspace module must be set up and enabled before workspace roles can be activated. A workspace is a group-editable Web page where you and groups of contacts in your community can interact and share information.

Workspace roles consist of a set of permissions that control the amount of access a contact has in a workspace.



Key	Description
1	Optional Module Roles - Workspace <ul style="list-style-type: none"> ■ Workspace Administrator Role (Default) ■ Editor Role (Default) ■ Observer Role (Default) ■ Community Administrator Role (Default)

The following topics describe the default workspace roles:

- “Workspace Administrator Role” on page 81
- “Editor Role” on page 82
- “Observer Role” on page 82
- “Community Administrator Role” on page 82

To edit permissions for workspace roles and assign roles to contacts, see “Working with Workspace Roles” on page 84. For a list of available permissions, see “Workspace Role Permission Descriptions” on page 86.

Workspace Administrator Role

Active Community automatically assigns the Workspace Administrator role to a contact after the contact creates a workspace. Contacts with this role can change the workspace name and description, add and remove members, start conversations, add events, and add files.

Editor Role

This role can be assigned to a contact who is an active participant in the workspace. Contacts who are assigned to this role can start and reply to conversations, add events, and upload files for sharing with other suppliers in a workspace.

Observer Role

This role can be assigned to contacts who need to view the workspace, but not participate in it. For example, an Observer might be a project team member who only wants to receive an informational copy of project-related email messages.

Community Administrator Role

The Community Administrator role is assigned to the person responsible for setting up and maintaining the community. By default, this role automatically has all permissions to all workspaces, and can view and edit any workspace in the community.

Registration Roles and Contacts

Important: The optional Registration module must be set up and enabled before registration roles can be activated.

Registration roles and contacts control the amount of information a person sees on a company registration request. The information in a request is based on a contact's registration role or on the "part" a contact plays in the registration process. That is, the:

- Pre-Approval and Approval *roles* can be assigned to contacts in the hub community. These registration roles are assigned to contacts in addition to security roles.
- Requesters and Primary Contacts are *contacts* inside and outside the hub community. Registration roles cannot be assigned to them.



- 1 Optional Module Roles - Registration
 - Requester (Default)
 - Pre-Approver Role (Default)
 - Primary Contact (Default)
 - Approval Role (Default)

Important: While the default roles outlined in the following topics are provided, a contact in the Community Administrator role can rename the roles so they are appropriate to a community (see ["Renaming Default Registration Roles" on page 90](#)).

The following topics describe the default registration roles:

- ["Requester" on page 83](#)
- ["Pre-Approval Role" on page 83](#)

- [“Primary Contact” on page 83](#)
- [“Approval Role” on page 83](#)

To edit permissions for registration roles and assign roles to contacts, see [“Working with Registration Roles” on page 88](#). For a list of available permissions, see [“Registration Role Permission Descriptions” on page 89](#).

Requester

A Requester can be a *contact* inside or outside the hub community, such as a contact with a potential supplier. Requesters can be contacts with these business roles: buyer, sales representative, or supplier liaison.

Requesters create or submit registration requests to the hub community.

Note: To submit registration requests, contacts outside the hub company must click the anonymous requester URL that is provided in an email.

Pre-Approval Role

The Pre-Approval role can be assigned to such hub employees as category managers or buyers. Multiple Pre-Approval roles can be defined.

Hub contacts in the role review registration requests and pre-approve them. The request then goes to the next stage in the registration process.

Primary Contact

A Primary Contact is the primary *contact* for a company outside the hub community. Primary Contacts receive registration requests from the hub company and complete information in the request.

Approval Role

Hub contacts in the Approval role validate that a Primary Contact completed all required details in a registration request. Multiple Approval roles can be defined.

General Optional Module Role Guidelines

The following guidelines apply to optional module roles:

- Default roles are provided.
- For the Workspace and Registration modules:
 - Permissions assigned to each role can be changed.
 - Roles can be assigned to contact profiles.
- For the Registration module, default roles can be renamed.

Default Optional Module Roles

The following default roles are provided for optional modules:

- Workspace roles
 - Workspace Administrator
 - Editor
 - Observer
 - Community Administrator

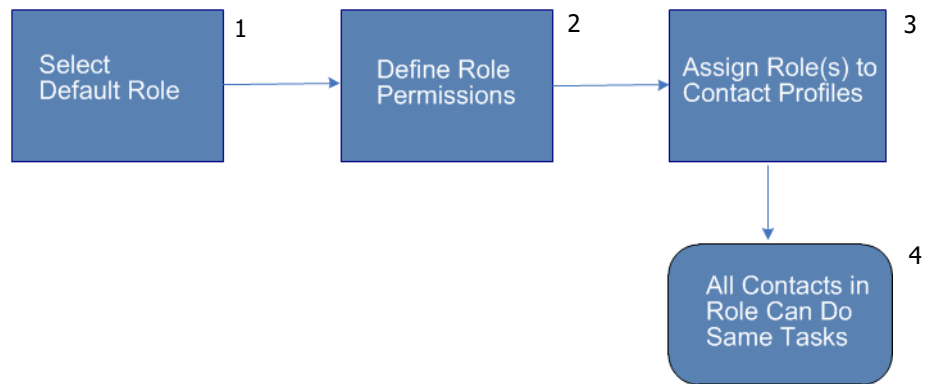
- Registration roles
 - Requester
 - Pre-Approval
 - Primary Contact
 - Approval

For information about default roles for security and contact (business) roles, see [“Default Security and Contact Roles” on page 55](#).

Working with Workspace Roles

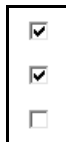
A *workspace role* consists of a set of permissions that control the actions a contact can perform in a workspace. For example, a contact with a workspace role of Editor can start and reply to conversations, add events, and upload files for sharing with other suppliers in a workspace.

The graphic outlines the general process for working with workspace roles, defining permissions, and assigning roles to contact profiles.



Key	Description
1	Select Default Role
2	Define Role Permissions
3	Assign Role(s) to Contact Profiles
4	All Contacts in Role Can Do Same Tasks

In the procedures, if a check box for a permission is selected, the permission is active for the role. If the check box for a permission is not selected, the permission is not active for the role.



Topics include:

- [“Editing Permissions for Workspace Roles” on page 85](#)
- [“Assigning a Workspace Role to a Contact” on page 86](#)

Editing Permissions for Workspace Roles

- Security role: Community Administrator

or

- Workspace role: Workspace Administrator

Security permissions:

- Workspace Permissions > View Workspace and Edit Workspace

Use this procedure to control which contacts view and edit different areas of a workspace. Workspace areas include Conversations, Upcoming Events, etc.

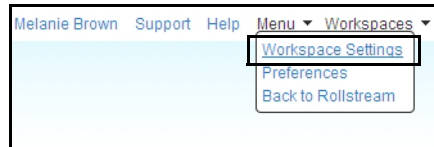
To edit permissions for a workspace role

- 1 Click **Applications**, and then **Workspaces**.

The Workspaces page opens.

- 2 At the top of the page, click **Menu > Workspace Settings**.

Note: If you do not see a Workspace Settings menu option, you are not a Community or Workspace Administrator.



The Workspace Settings page opens.

- 3 Under the Permission heading, to add or remove a permission for a particular role, simply select or clear the check box (see ["Workspace Role Permission Descriptions"](#) on page 86).

Lost in Space

[Home](#) > Workspace Settings

Email Notification

No Notification

Daily Notification

Instant Notification

Permissions

	Editor	Observer	Workspace Administrator	Community Administrator
Members				
Add Members	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Remove Members	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Documents				
Upload Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Events				
Edit Events	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forums				
Edit Forums	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Workspaces				
View Workspace	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Workspace	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Delete Workspace	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4 Click **Save**.

Note: Permissions cannot be removed from the Community Administrator security role. This safeguard ensures that at least one role has full access to the workspace.

Workspace Role Permission Descriptions

Use the information in the table as you select or clear the permissions for a Workspace role.

Select or clear this option...	If you want a role to do this:
Members	
■ Add Members	■ Add members to the workspace
■ Remove Members	■ Remove members from the workspace
■ Upload Documents	■ Upload documents to the workspace
■ Delete Documents	■ Delete documents from the workspace
■ Edit Events	■ Edit workspace events
■ Edit Forums	■ Edit workspace forums
■ View Workspace	■ View the workspace
■ Edit Workspace	■ Edit the workspace
■ Delete Workspace	■ Delete the workspace

Assigning a Workspace Role to a Contact

- Security role: Community Administrator
- or
- Workspace role: Workspace Administrator

Security permissions:

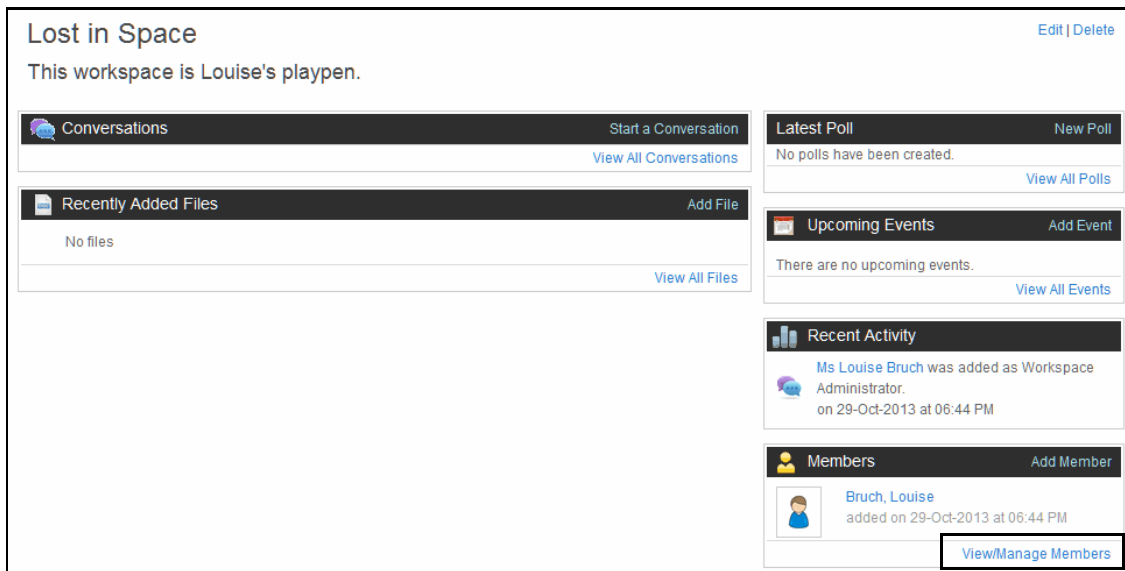
- Workspace Permissions > View Workspace and Edit Workspace

Use this procedure to assign a role to a workspace member.

To assign a workspace role to a workspace member

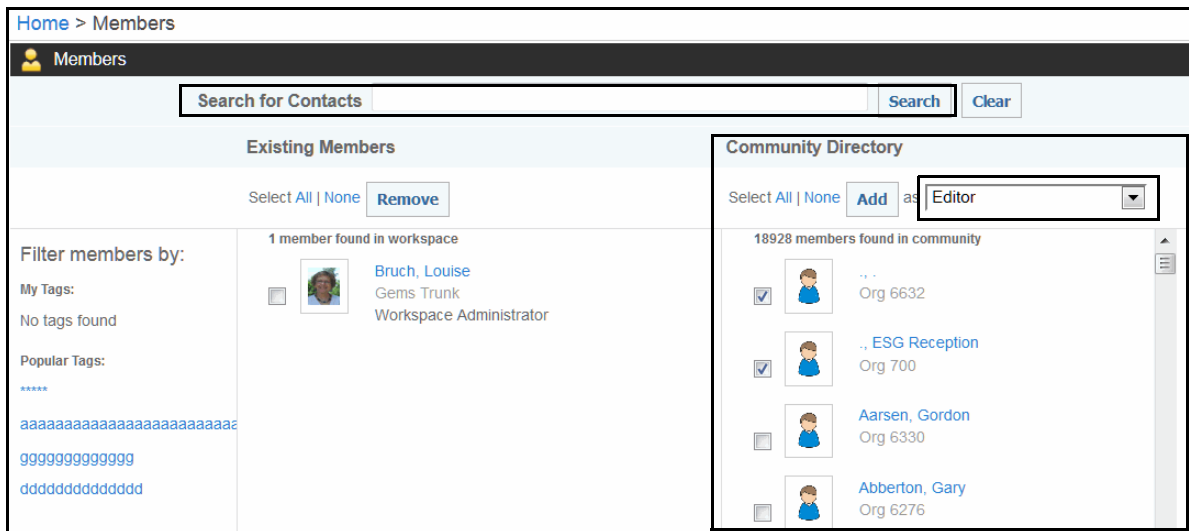
- 1** Click **Applications**, and then **Workspaces**.
The Workspaces list page opens.
- 2** Select the workspace to which you want to add a team member.

The main page for the workspace opens.



3 In the Members section, click **View/Manage Members**.

The Members page opens.



4 In Search for Contacts, type the name of the contact to whom you want to assign a workspace role, then click **Search**.

5 In the Community Directory column, select the check box for the contact(s) to whom you want to assign a role.

6 In the drop-down list, select the role you want to assign to the contact.

7 Click **Add**.

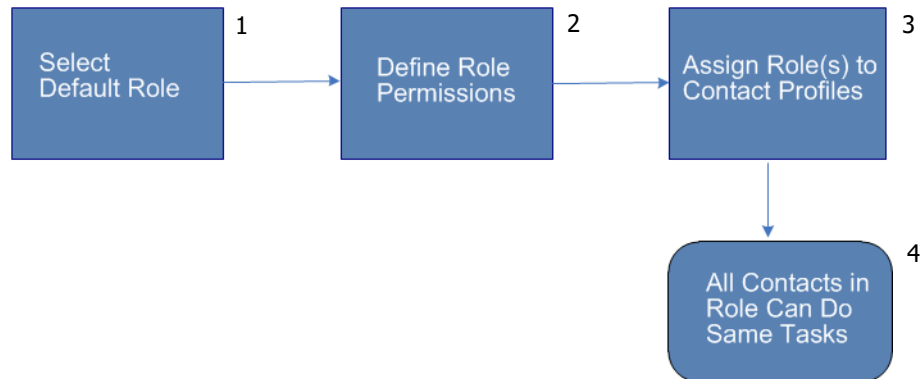
The selected workspace role is assigned to the contact. The contact's name moves from the Community Directory column to the Existing Members column.

Working with Registration Roles

Important: The Registration module must be set up and enabled before registration roles can be activated.

Registration roles control which users can perform actions on registration requests during the request approval process.

The graphic outlines the general process for working with registration roles and assigning them to contact profiles.



Key	Description
1	Select Default Role
2	Define Role Permissions
3	Assign Role(s) to Contact Profiles
4	All Contacts in Role Can Do Same Tasks

In the procedures, if a check box for a permission is selected, the permission is active for the role. If the check box for a permission is not selected, the permission is not active for the role.



Topics include:

- ["Defining Permissions for Registration Roles" on page 88](#)
- ["Renaming Default Registration Roles" on page 90](#)

Defining Permissions for Registration Roles

Security role: Community Administrator

Use this procedure to identify the request information you want people in different Registration roles to see and edit on Registration tabs. For example, you might want to include a Buyer Checklist tab that contains custom fields in a registration request. You only want the tab to be viewed and edited by contacts in the Requester role.

To define permissions for registration roles

- 1 Click **Applications > Registration > Admin** tab.

2 Click the **Manage Permissions** link.

The Registration Permissions page opens. Registration roles are listed across the top of the page.

Registration Permissions				
	Requester	Pre-Approval	Primary Contact	Approval
Company Details				
View Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Primary Contact Details				
View Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Details				
View Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				Show Field Permissions

3 To indicate which tabs you want to show or hide for each role, select or clear the check boxes in the Permissions column for each role.

4 To specify permissions for fields within a custom field group, click the **Show Field Permissions** link, then select or clear the fields you want registration roles to view or edit (see ["Registration Role Permission Descriptions"](#) on page 89).

5 Click **Save**.

Registration Role Permission Descriptions

Use the information in the table as you select or clear the permissions for a Registration role.

Select or clear this option...	If you want a role to do this:
Company Details	
<input type="checkbox"/> View Details	<input type="checkbox"/> View details of a company
<input type="checkbox"/> Edit Details	<input type="checkbox"/> Edit details of a company
Primary Contact Details	
<input type="checkbox"/> View Details	<input type="checkbox"/> View details of a primary contact
<input type="checkbox"/> Edit Details	<input type="checkbox"/> Edit details of a primary contact
Contact Details	
<input type="checkbox"/> View Details	<input type="checkbox"/> View contact details
<input type="checkbox"/> Edit Details	<input type="checkbox"/> Edit contact details
Custom Field Groups	
<input type="checkbox"/> Edit Group	<input type="checkbox"/> Edit custom field groups or custom fields within a group
<input type="checkbox"/> View Group	<input type="checkbox"/> View custom field groups or custom fields within a group

Renaming Default Registration Roles

Security role: Community Administrator

Use this procedure to rename default Registration roles so they are appropriate to a community. For example, the default:

- Pre-Approval role might be renamed to Buyer
- Requester role might be renamed to Potential Trading Partner
- Approval role might be renamed to Supplier Relations Team

To rename default registration roles

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Configure Approvals** link.
The Configuration Approval page opens.
- 3 Scroll to the Customize Approval Stage Labels part of the page. The default Registration role names are listed in the Approval stage column.

[Customize Approval Stage Labels](#)

For each approval stage enter a custom label to modify how it is displayed.

Approval stage	Label
Requester	<input type="text" value="Requester"/>
Pre-Approval (all levels)	<input type="text" value="Buyer"/>
Pre-Approval Level 1	<input type="text" value="Buyer"/>
Pre-Approval Level 2	<input type="text" value="CAT D"/>
Primary Contact	<input type="text" value="Primary Contact"/>
Approval	<input type="text" value="Sup Reg"/>

- 4 Under the Label column, type the new name(s) of the role(s).
Note: There is multiple language support for the Primary Contact label. See more information on language support in ["Language Options for Custom Field Groups, Questions, and Choices"](#) on page 238. Also see ["Changing Your Language"](#) on page 11.
- 5 Select a default landing tab for the primary contact. This is the tab that you want the primary contact to land on when they receive a registration request and enter the registration module.

Primary Contact Default Tab :

Note: Only tabs that are parent tabs are displayed in the drop-down list and can be selected. You cannot select a dependent tab (child tab).

- 6 Click **Save**.
A message indicates the configuration has been updated.

Search options help you find the exact information you need. Use search options to find contacts, companies, participants in activities, or project team members in your community.



View data about all companies named "Acme" with a Revenue (Mil) of 5.

Even though search options are available from many different parts of Active Community, this section describes how to use them from a general perspective using company and contact profiles. Specific procedures related to each module provide more detailed information.

Topics include:

- ["Quick \(Simple\) Searches" on page 91](#)
- ["Advanced Searches" on page 93](#)
- ["Saved Searches" on page 102](#)
- ["Tagging Search Results" on page 106](#)
- ["Acting on Search Results" on page 109](#)

Quick (Simple) Searches

Use a quick search, sometimes called a simple search, for easy, single-word searches, such as for contacts with a last name of "Smith" or companies that contain the name "Acme."

Active Community matches the search word or words you enter against common fields in contact or company profiles, such as Name, Company Name, and Email Address. For example, if you enter "Smith" as search criteria, the results might include a contact named "Matt Smith" and contacts who work for a company named "Smith Industries."

Go to ["Using Quick \(Simple\) Searches" on page 92](#).

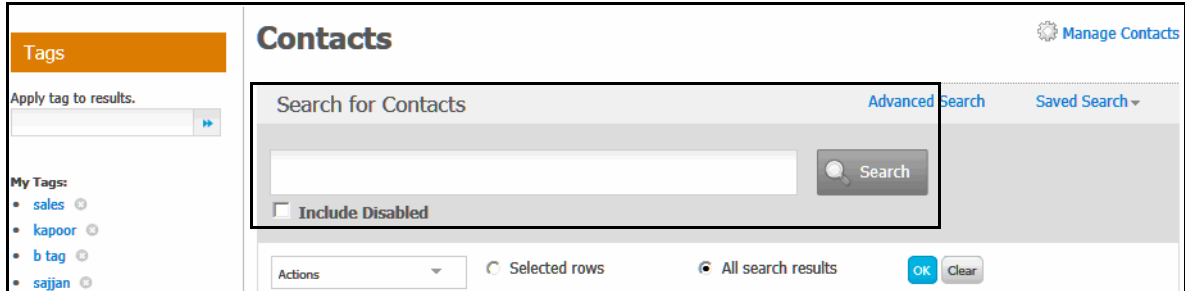
Using Quick (Simple) Searches

To use quick search

- 1 Click **Profiles > Companies** or **Contacts**.

The All Companies or Contacts page opens.

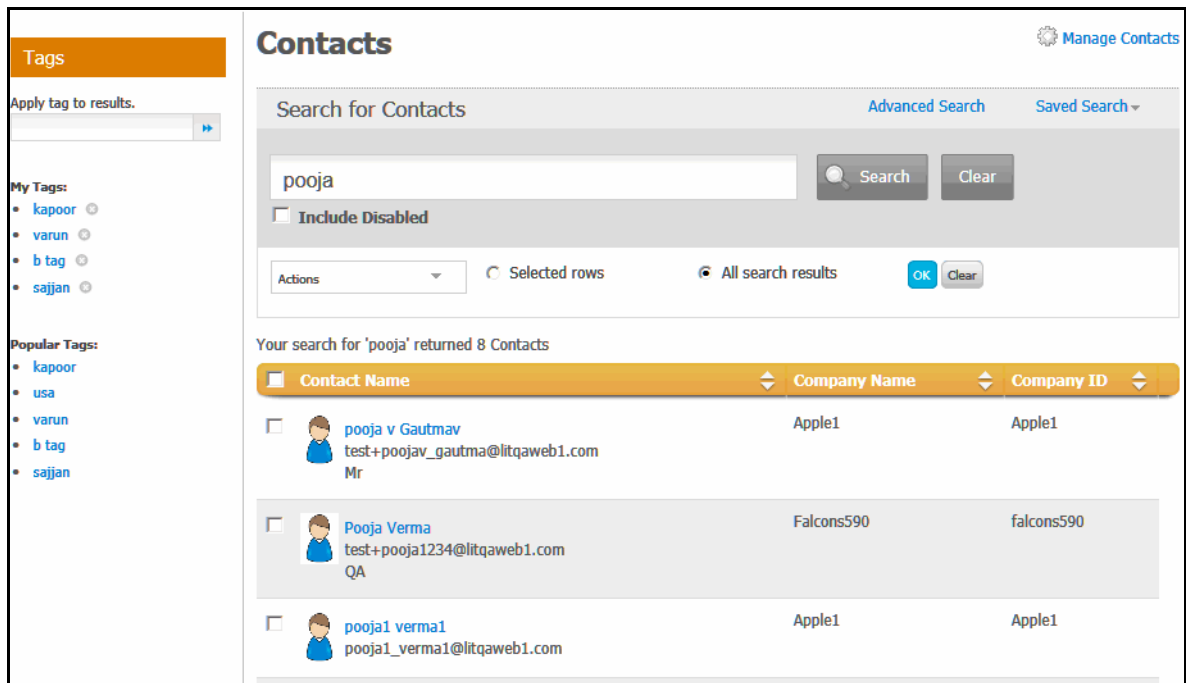
- 2 In the **Search:** or **Search for Contacts** box, type a person's name, company, or other search criteria.



- 3 (Optional) Select the **Include Disabled** check box if you want to include disabled contacts or companies in your search.

- 4 Click **Search**.

The search results display.



- 5 Decide what you want to do with the search results:

- To clear the search criteria and view all contacts or companies again, click **Clear**.
- To view profile details, such as company or contact information, open the profile you want. To return to search results, click **Return to Search** on the profile page.

- To create a saved search based on the search results, see [“Creating a Saved Search” on page 103](#).
- To create tags, which allow you to quickly find company and contact profiles based on the search results, see [“Tagging Search Results” on page 106](#).
- To use the Actions drop-down list to perform an action on the results, such as disable contacts or export a list of companies, click the Actions drop-down list and select the action you want to perform (see [“Acting on Search Results” on page 109](#)).

Advanced Searches

Use advanced searches to perform more complex searches for information. The more search criteria you use, the more specific the results of your search.

For example, use advanced search if you want to find:

- All contacts who have been disabled since 1/1/2009
- All companies with a name matching “Acme” and with a Revenue (Mil) of 5
- All activity participants who have not responded to web form questions with an activity status of “Assigned” or “In Progress”

Topics include:

- [“Advanced Search Page” on page 93](#)
- [“Advanced Search Examples” on page 94](#)
- [“Commonly Used Advanced Searches” on page 97](#)
- [“Creating Advanced Searches” on page 100](#)

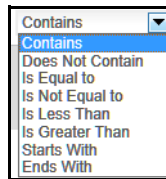
Advanced Search Page

The advanced search page contains many options that let you find the exact information you need.

The screenshot shows the 'Find contacts where...' search interface. It features two search blocks. The first block is for contacts, with criteria: 'Contact' (2), 'Name' (3), 'Contains' (4), and 'Smith' (5). The second block is for companies, with criteria: 'Company' (8), 'Created On' (9), 'Is On or Before' (10), and '6/16/2016' (11). The interface includes 'All' and 'Any' buttons for attribute selection, 'Or' and 'And' buttons for logical operators, and a '+ Add Condition Block' button. At the bottom, there are 'Search', 'Save', and 'Clear' buttons.

The parts of an advanced search page:

Key	Description
1	ALL or ANY Attributes match the following—Match <i>all</i> /search criteria or <i>any</i> of the search criteria in all rows.
2	Contact, company, or sub-community (only for company profiles) search box.
3	Options in the second search box change based on the selection in the first search box (contact, company, or sub-community (only for company profiles)). Note: If data masking is enabled for a company custom field, and you do not have permission to view the field, the field is unavailable in the drop-down list and cannot be selected.
4	Options vary based on selections in the second search box, including contains, does not contain, is equal to, is not equal to, is less than, is greater than, starts with, ends with, is on or before, is on or after, in last 24 hours, after, before, all, none.



Select the operator that describes how you want Active Community to search for information.

5	Fourth search box—Type the word, number, or date the operator is to be paired with
6	Click the + icon to add another row of search attributes
7	OR or AND Attributes match the following: <ul style="list-style-type: none"> ■ AND means Active Community matches both sets of search criteria. ■ OR means Active Community matches either one or the other set of search criteria.
8	Options vary based on selections in the third search box (see 4). When you select the operator “Is On or Before” or “Is On or After,” a days or date search box displays (see 9).
9	Type the numbers of days or select a date. The days or date search box displays when you select the operator “Is On or Before” or “Is On or After” (see 8).
10	Click the icon to switch between the text box for days and date (see 9).
11	Click Add Condition Block to add more search conditions.

See also [“Advanced Search Examples” on page 94](#), [“Commonly Used Advanced Searches” on page 97](#), and [“Creating Advanced Searches” on page 100](#).

Advanced Search Examples

Advanced search provides many search options so you can find the data you need. The following examples show how to find the company or contact profiles by selecting different values and combining search criteria.

Topics include:

- [“To find companies that support specific EDI transactions” on page 95](#)

- “To find companies that support EDI, but have not specified transaction types” on page 95
- “To find contacts with more than five years work experience who work for current suppliers” on page 96

To find companies that support specific EDI transactions

In this community, a custom field called EDI Transactions has been defined. It contains the EDI transaction numbers that trading partners support.

The screenshot shows a search interface titled "Find member companies where...". It features a search bar with "Quick Search" and "Saved Search" options. Below the search bar, there are two radio buttons for "ALL" (selected) and "ANY". The search criteria are defined by two rows of conditions:

Operator	Field	Value	Comparison	Value
⊗	Company	EDI Transactions	Is Equal to	832
⊗	Company	EDI Transactions	Is Equal to	850

Buttons for "Add another condition block", "Clear", "Search", and "Save" are visible at the bottom of the interface.

Use the following search criteria to find companies that support specific EDI transactions:

- ALL

First set of search attributes:

- Company
- EDI Transactions
- Is Equal to
- 832

Second set of search attributes:

- Company
- EDI Transactions
- Is Equal to
- 850

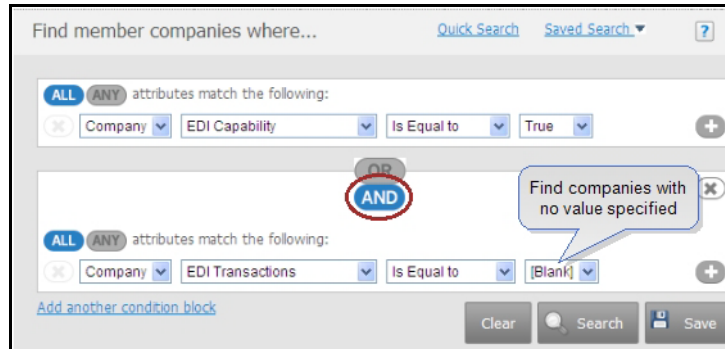
Note: ALL means Active Community matches both rows of search criteria. To find partners who support *either* EDI 832 or 850, select ANY instead of ALL.

To find companies that support EDI, but have not specified transaction types

In this community, the following custom fields have been defined:

- EDI Capability—Indicates (True/False) if a trading partner has a VPN or the necessary infrastructure to support EDI communication
- EDI Transactions—EDI transaction numbers that trading partners support

You want to find all trading partners who have EDI capability but who have not specified the EDI transactions they support. After you pinpoint these partners, you want to send them an email reminder to update their EDI transaction types.



Use these search criteria to find companies that support EDI, but have not specified EDI transaction types.

First set of search attributes:

- Company
- EDI Capability
- Is Equal to
- True

AND

Second set of search attributes:

- Company
- EDI Transactions
- Is Equal to
- Blank (find companies with no value specified)

Note: AND means Active Community matches both sets of search criteria. To find all partners who either have EDI Capability *or* have no EDI Transactions, select OR instead of AND.

To find contacts with more than five years work experience who work for current suppliers

In this community, the following custom fields have been defined:

- Years Experience—Number of years of work experience for each contact in the community
- Current Supplier of Acme—Indicates (Yes/No) if a contact's company is a current supplier for Acme, the hub owner

You want to find all contacts in the community who have more than five years of work experience, but are only interested in contacts who work with current suppliers.

The screenshot shows the 'Acme Industries Contacts' search interface. At the top right is a '+ ADD CONTACT' button. Below it is a search bar with the placeholder text 'Find contacts where...'. To the right of the search bar are links for 'Quick Search', 'Saved Search', and a help icon. The search criteria are defined in two blocks. The first block is labeled 'ALL ANY attributes match the following:' and contains a search condition: 'Contact' (dropdown), 'Years Experience' (dropdown), 'Is Greater Than' (dropdown), and '5' (text input). The second block is labeled 'OR AND' and contains another search condition: 'Company' (dropdown, circled in red), 'Current supplier of Acme?' (dropdown), 'Is Equal to' (dropdown), and 'Yes' (dropdown). At the bottom of the search criteria are buttons for 'Clear', 'Search', and 'Save'. A link 'Add another condition block' is also visible.

Use these search criteria to find contacts with more than five years of work experience who work for current suppliers.

Note: Both contact and company search attributes are included.

ALL

First set of search attributes:

- Contact
- Years Experience
- Is Greater Than
- 5

AND

Second set of search attributes:

- Company
- Current Supplier of Acme
- Is Equal to
- Yes

Note: The company search criteria in the second search box lets you to find all contacts based on company-level information. Because the AND button is enabled, Active Community matches both sets of search criteria.

Commonly Used Advanced Searches

The following topics outline the criteria used for commonly used advanced searches. Modify the search criteria to meet your needs.

Topics include:

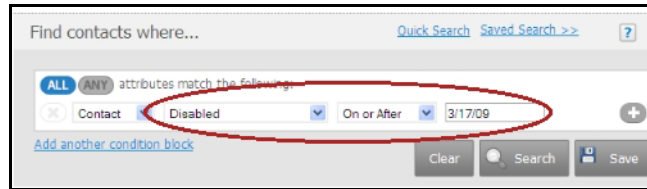
- ["To find disabled companies or contacts" on page 98](#)
- ["To find company or contact custom fields" on page 98](#)
- ["To find companies with long custom field names" on page 98](#)

- "To find contacts who are participating an activity" on page 99
- "To find contacts based on their contact (business) role" on page 99
- "To find companies or contacts based on created date or duration" on page 99
- "To find companies" on page 100
- "To find divisions in a company" on page 100

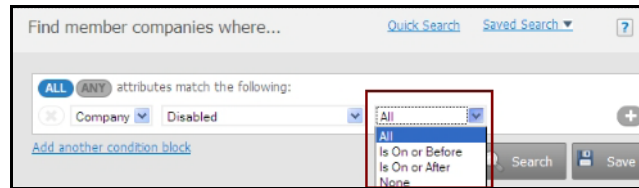
To find disabled companies or contacts

Use search to re-enable all disabled profiles in your community.

- In the search box, select Disabled and specify a date in MM/DD/YYYY or MM/DD/YY format.



- Optional. Select ALL to view all disabled companies or contacts in your community.



To find company or contact custom fields

- In the search box, select the custom field and select the value you want to find.

Note: For custom fields with predefined answers, such as multiple choice, yes/no, true/false, and radio button lists, the values to be searched display in the search box.

- To search for more than one value, add another search row by clicking the + icon.

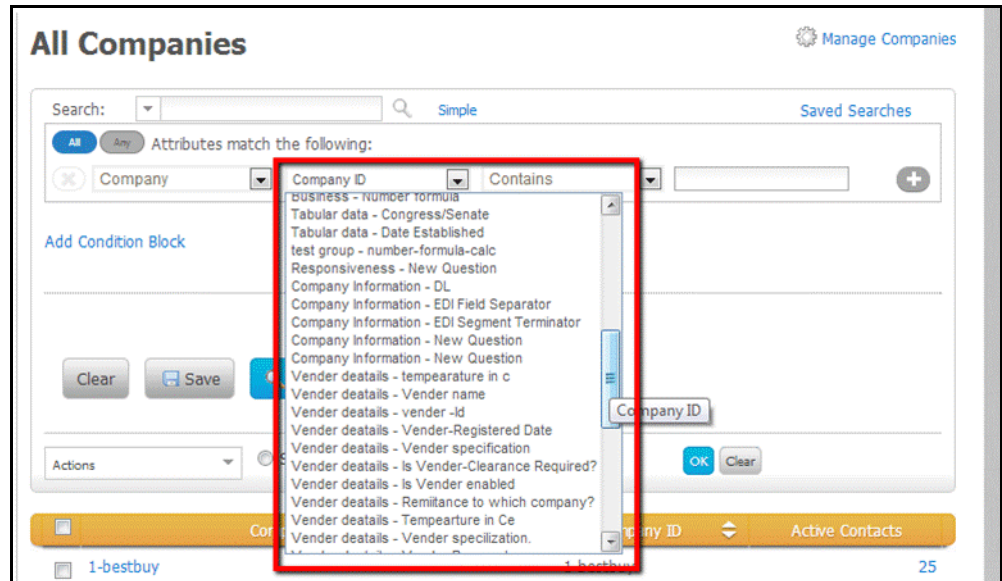


Note: Custom fields contained in groups to which you do not have View Question Group permission are not available in the selection list.

To find companies with long custom field names

While the Company ID drop-down list *displays* up to 133 characters, which makes it easy to differentiate between fields with similar long names, custom field names can be longer than 133 characters.

- Hover your cursor over a selection in the list, and the entire name displays.

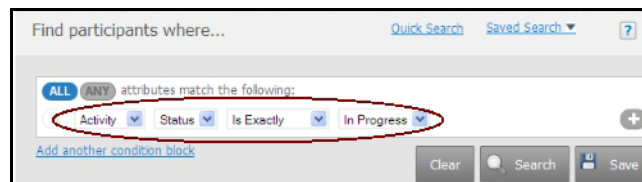


Note: This functionality is available when using Chrome, Firefox, and Internet Explorer (IE) 9 or 10.

To find contacts who are participating an activity

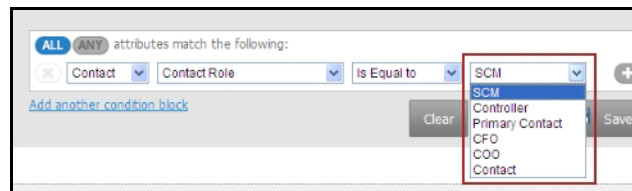
Use to find all activity participants who have not completed a web form or updated their profile status.

- In the participant search list of an activity, select Assigned, In Progress, or Completed.



To find contacts based on their contact (business) role

- In the search list, select the contact (business) role you want to match.

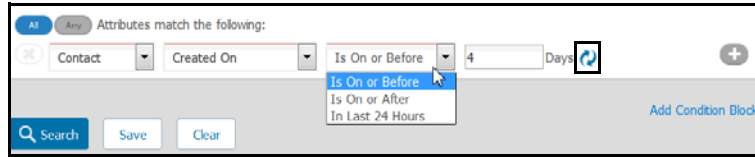


Note: The search results list contacts profiles assigned to the selected role.

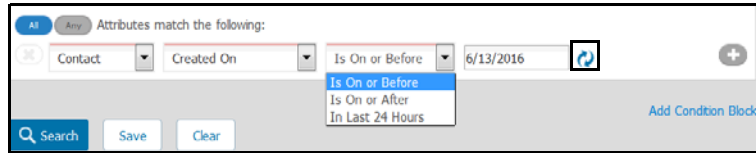
To find companies or contacts based on created date or duration

- In the search list, select Created On and then select the appropriate duration.
You can type the number of days or a date. To switch between the days and date fields, click the icon for the days/date field.

Days field



Date field



Note: If you select **In Last 24 Hours** the days/date field does not display.

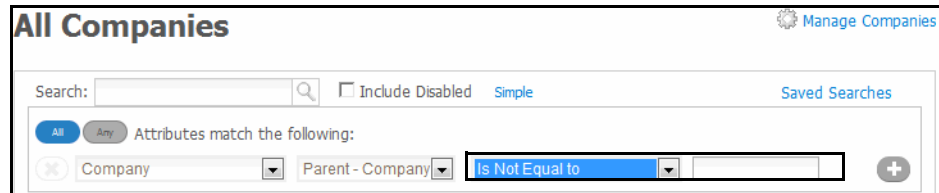
To find companies

- Select **Parent-Company** and **Is Equal To** from the drop-down lists. Add other conditions as needed.



To find divisions in a company

- Select **Parent-Company** and **Is Not Equal To** from the drop-down lists. Add other conditions as needed.



Creating Advanced Searches

Use an advanced search when you want to include complex search criteria to find the data you need.

To create an advanced search

- 1 Click **Profiles > Companies** or **Contacts**.
The All Companies or Contacts page opens.
- 2 Click **Advanced** or **Advanced Search**.

The Advanced Search page opens.

The screenshot shows the top of the Advanced Search interface. At the top left is a search bar with a magnifying glass icon. To its right is a checkbox labeled 'Include Disabled' and the word 'Simple'. Further right is a link for 'Saved Searches'. Below this is a section titled 'Attributes match the following:' with two radio buttons, 'All' (selected) and 'Any'. A search condition is visible: a dropdown menu with 'Company' selected, followed by another dropdown menu with 'Parent - Company Nai' selected, and a third dropdown menu with 'Contains' selected. To the right of these is an empty text input field. At the bottom left are three buttons: 'Search' (with a magnifying glass icon), 'Save', and 'Clear'. At the bottom right is a link labeled 'Add Condition'.

- 3 In the search boxes, select the search attributes you want to use (see [“Advanced Search Examples”](#) on page 94 and [“Commonly Used Advanced Searches”](#) on page 97).

For example, if you want to locate all contacts with a company name of Acme, select the appropriate fields from the drop-down lists and type Acme in the last search box.

- 4 (Optional) Select the **Include Disabled** check box if you want to search for disabled contacts or companies.
- 5 To add additional search criteria, either:
 - Click the **+** icon to add another row of search attributes
 - Click **Add Condition Block** to add more search conditions

This screenshot is similar to the previous one but highlights the addition of a new condition. A small square box with a plus sign (+) is highlighted on the right side of the first search condition row. Below the search interface, a button labeled 'Add Condition Block' is highlighted with a rectangular box.

- 6 Do the following:
 - Specify the additional attributes or conditions in the search boxes.

This screenshot shows the search interface with two conditions. The first condition is the same as in the previous screenshots: 'Company' in the first dropdown, 'Parent - Company Nai' in the second, and 'Contains' in the third. Below this is a horizontal separator with two radio buttons, 'Or' and 'And' (selected). Below the separator is a second search condition: 'Sub-community' in the first dropdown, 'Name' in the second, and 'Contains' in the third. The 'Add Condition Block' button is visible at the bottom right.

- Indicate if you want to find results that match *either* condition, or *both* conditions.

Note: By default, search results match both conditions. To match either condition, click **OR** for the condition. For example, you might want to locate all contacts with a company name of "Acme" OR a Country of "USA."

7 Click **Search**.

The search results display.

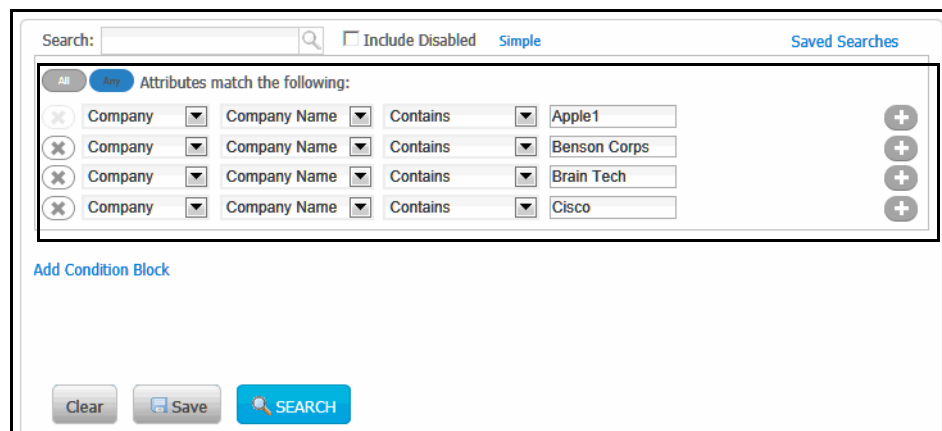
8 Decide what you want to do with the search results:

- To clear the search criteria and view all contacts or companies again, click **Clear Search**.
- To view profile details, such as company or contact information, open the profile you want. To return to search results, click **Return to Search** on the profile page.
- To create a saved search based on the search results, see ["Creating a Saved Search" on page 103](#).
- To create tags, which allow you to quickly find company and contact profiles based on the search results, see ["Tagging Search Results" on page 106](#).
- To use the Actions drop-down list to perform an action on the results, such as disable contacts or export a list of companies, click the Actions drop-down list and select the action you want to perform (see ["Acting on Search Results" on page 109](#)).

Saved Searches

Saved searches are complex searches (such as searching for company custom fields, or searching for contacts in specific company divisions) that you can save and use again and again without having to re-create the initial search.

When you run a saved search, the conditions for the original search display so you can modify them, if needed.



You create saved searches after performing an advanced search.

Topics include:

- “Creating a Saved Search” on page 103
- “Running a Saved Search” on page 104
- “Viewing Saved Search Details” on page 105
- “Renaming or Deleting a Saved Search” on page 105

Creating a Saved Search

Security Permission: Public Reports > Create Public Searches

You can create saved searches for company or contact profiles. Use a saved search to run and re-run a report, thereby accessing the latest data for the report.

For companies, three types of saved searches are available:

- Private searches—Searches you create that only you can edit or run.
- Public Searches by Current User—Public searches you create that others can run, but not edit. Only the creator of a search can edit it.
- Public Searches by Other Users—Searches other users create that anyone can run.

For contacts, private saved searches can only be used by the person who created them; other users in the community cannot see private saved searches.

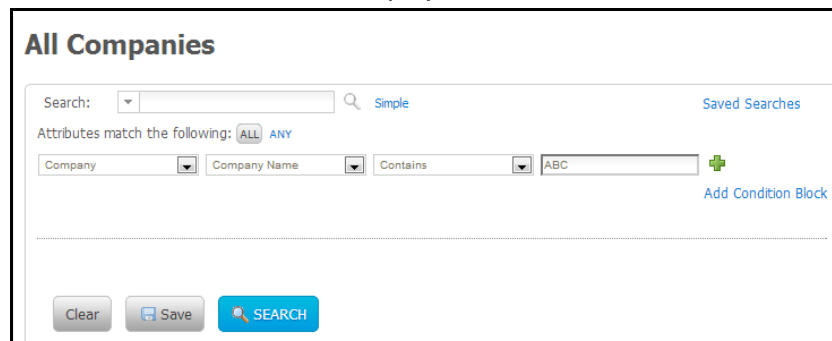
To create a saved search

- 1 Click **Profiles > Companies** or **Contacts**.

The All Companies or Contacts page opens.

- 2 Click **Advanced** or **Advanced Search**.

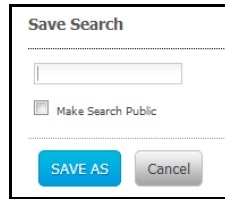
The advanced search fields display.



The screenshot shows the 'All Companies' search interface. At the top, there is a search bar with a dropdown menu and a search icon. Below the search bar, there are options for 'Attributes match the following: ALL ANY'. The main search area contains a dropdown menu for 'Company', a text input field for 'Company Name', a dropdown menu for 'Contains', and a text input field for 'ABC'. There is a green plus icon and a link 'Add Condition Block' to the right of the search fields. At the bottom, there are three buttons: 'Clear', 'Save', and 'SEARCH'.

- 3 Select the search attributes you want to use in the search boxes (see “Advanced Searches” on page 93).
- 4 Click **Search**.
The search results display.
- 5 To save the search criteria, click **Save**.

A dialog box opens.

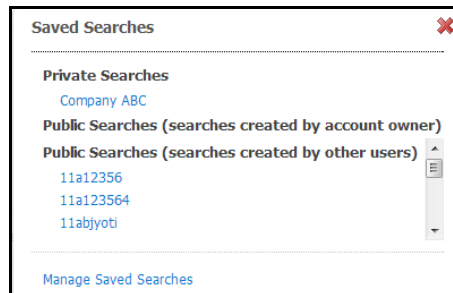


- 6 In the text box, type a name for the search.
- 7 To make the search public, select the **Make Search Public** check box. If the box is not selected, the search is private.
Note: The Make Search Public check box is available only for companies searches.
- 8 Click **Save As**.
Active Community saves the search criteria so it can be used again.

Running a Saved Search

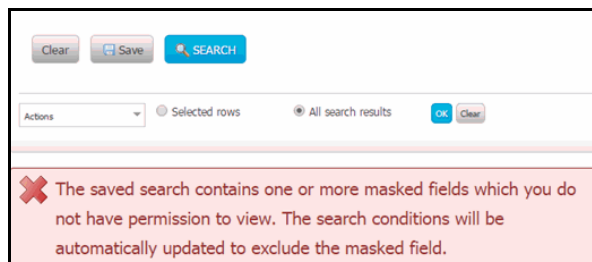
To run a saved search

- 1 Click **Profiles > Companies** or **Contacts**.
The All Companies or Contacts page opens.
- 2 Click the **Saved Search** link, and select the search you want to run.



Active Community displays the search results.

Note: If data masking is enabled for a company custom field that is included in the saved search, and you do not have permission to view it, an error message indicates that the search conditions will be automatically updated to exclude the masked field.



Viewing Saved Search Details

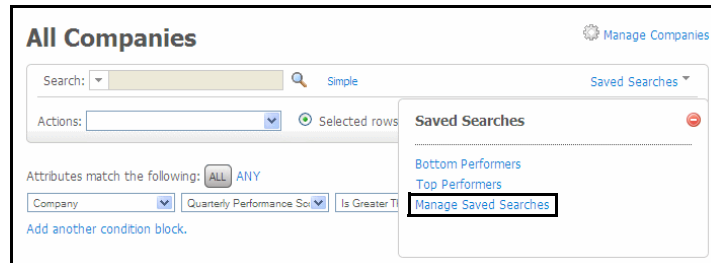
To review the criteria for a saved search

- 1 Click **Profiles > Companies** or **Contacts**.

The All Companies or Contacts page opens.

- 2 Click the **Saved Searches** link.

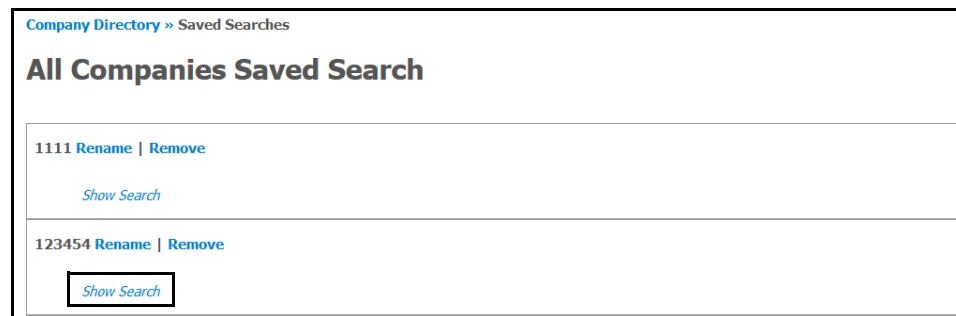
The Saved Searches menu opens.



Note: You cannot view or run other users' private saved searches. You can only run saved searches that you have created in your community or that others have created and made public.

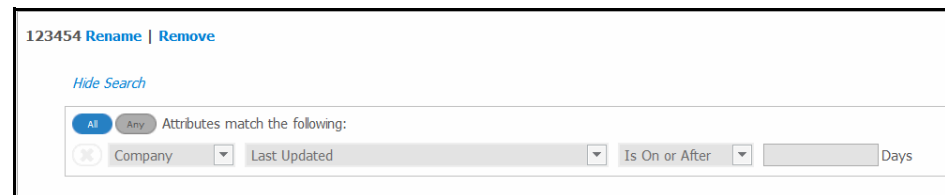
- 3 At the bottom of the list, click **Manage Saved Searches**.

The Saved Search page opens.



- 4 Click **Show Search** for the search whose criteria you want to view.

The search details display.



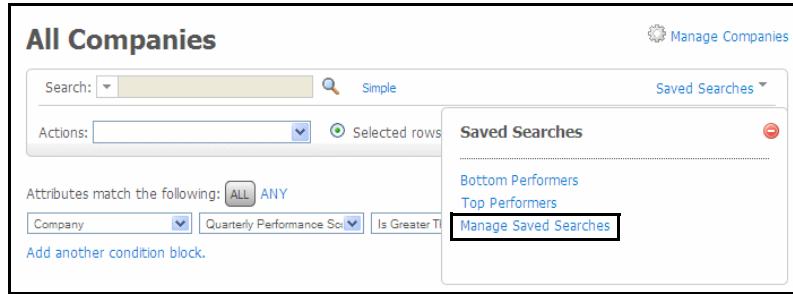
Renaming or Deleting a Saved Search

To rename or delete a saved search

- 1 Click **Profiles > Companies** or **Contacts**.

The All Companies or Contacts page opens.

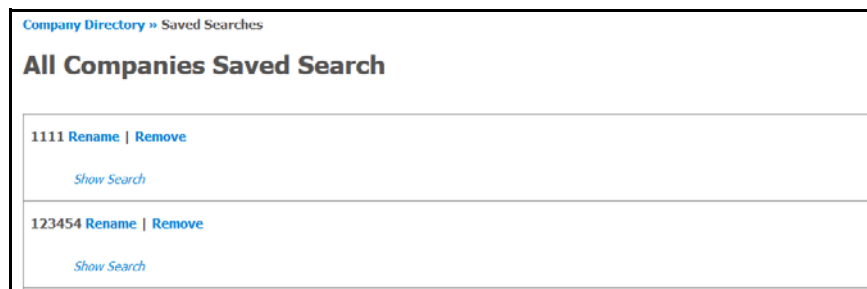
2 Click the **Saved Search** link.



Note: You cannot view or run other users' saved searches. You can only run the saved searches that you have created in your community.

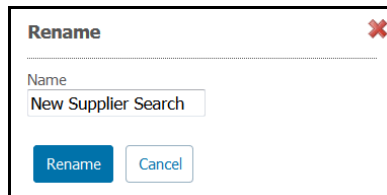
3 At the bottom of the list, click **Manage Saved Searches**.

The Saved Search page opens.

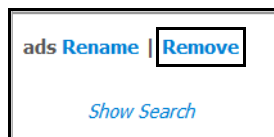


4 Perform the appropriate action:

- To rename the search, click **Rename** and type a new name for the search in the dialog box that opens.



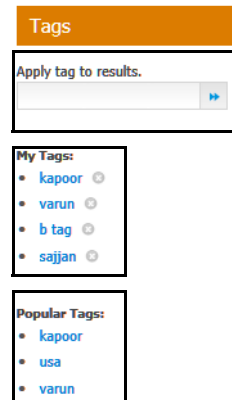
- To remove the search from the list of saved searches, click **Remove** for the search, and confirm the deletion in the dialog box that opens.



Tagging Search Results

Tags allow you to quickly and easily find company and contact profiles in the community. Tags are used to group contacts by any user in your community. Tags

are made up of a single keyword or phrase (up to 256 characters), and are applied to search results.



Two types of tags are available, My Tags and Popular Tags.

- My Tags are tags you create in Active Community. The tags can be seen by anyone in the community, and anyone can use them to find a contact. Because you created a tag, you can delete it.
- Popular Tags are created by anyone in the community, including you. Active Community lists Popular Tags in order based on the number of times the tag has been used. You cannot delete Popular Tags created by others.

Go to [“Tagging Search Results with Keywords” on page 107](#) and [“Using Tags” on page 108](#).

Tagging Search Results with Keywords

Security Permissions: Tag Permissions > Update Tags

Tags allow you to quickly and easily find company and contact profiles in your community. Tags are not search-specific; they allow you to tag (or identify) contacts and companies based on different criteria.

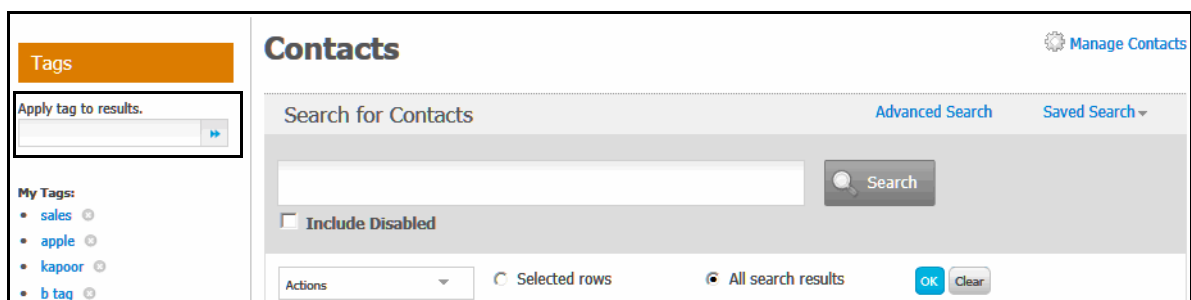
Important: The easiest way to tag a set of contact profiles with the same keyword is to search for the profiles you want, then assign the keyword to the search results.

To tag contacts with keywords

- 1 Click **Profiles** > **Contacts**.

The Contacts page opens.

- 2 Perform a quick or advanced search to display the list of contact or company profiles that you want to tag.

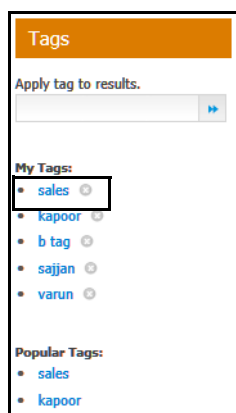


- 3 In the Apply tag to results box, type the keyword to assign to the profiles listed, such as Sales or Revenue
- 4 Click the arrow to tag the results.
Note: If the tag already exists in your community, the profiles are added to the existing group of profiles in search results.

Using Tags

To use tags to find contact profiles

- 1 Click **Profiles > Contacts**.
The Contacts page opens.
- 2 Under Tags, click the tag you want to use. For example, if you want to display all profiles tagged with "sales," click **sales**.



Active Community displays contact profiles "tagged" by the keyword.

Acting on Search Results

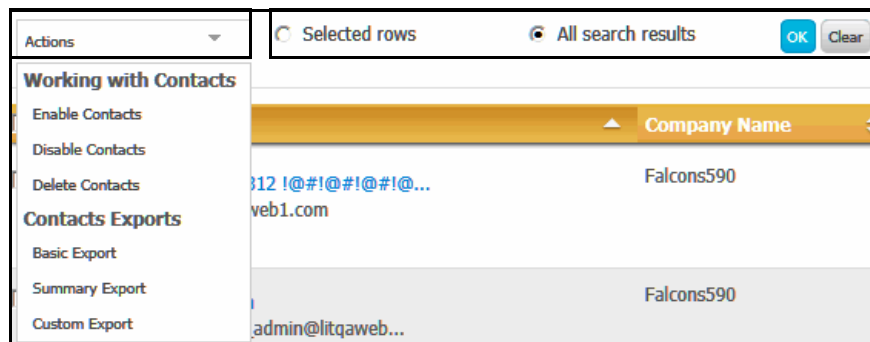
After finding the information you need using the methods described in this section, use the options in the Actions drop-down list to apply actions to search results. For example, if you want to export all search results to a spreadsheet, select Actions > Basic Export and follow the prompts.

To act on search results

- 1 Click **Profiles** > **Companies** or **Contacts**.

The All Companies or Contacts page opens.

- 2 After finding the information you need using a quick or advanced search, on the search results page, click the Actions drop-down list.



- 3 Select the action you want to perform.
- 4 To apply the action to:
 - All search results—Select **All Search Results**, and click **OK**.
 - Selected search results—Select the check boxes for the companies or contacts to which you want the action to apply, select **Selected Rows**, and click **OK**.

Active Community opens the action process you selected.

- 5 Follow the prompts to complete the action.

Active Community provides several ways to add companies and contacts to your community. They can be:

- Added manually using the Companies and Contacts pages
- Imported using comma-separated value (.csv) files
- Created using:
 - The optional Registration module, where the completed registration process creates companies and contacts
 - The Active Community API

In addition, public web forms can be used to gather information about companies and contacts that are not yet part of a community. The data can be imported into Active Community as described in ["Importing Companies and Contacts Using CSV Files" on page 128](#).

Note: If you have an Active Community community and a Trading Grid Online (TGO) community with a subscription to Intelligent Web Forms (IWF) or Active Invoices, you can make updates to companies and contacts in Active Community and have the changes automatically updated in TGO (see ["Synchronizing Active Community with Trading Grid Online \(TGO\)" on page 21](#)).

Topics include:

- ["Company and Contact Overview" on page 112](#)
- ["Adding Companies and Contacts Manually" on page 122](#)
- ["Importing Companies and Contacts Using CSV Files" on page 128](#)
- ["Working with Sub-communities" on page 140](#)
 - ["Creating a Security Role for a Sub-Community" on page 141](#)
 - ["Creating a Sub-community and Assigning Contacts and Roles" on page 141](#)
 - ["Adding Companies to a Sub-community" on page 144](#)
 - ["Removing Companies from a Sub-community" on page 147](#)
 - ["Viewing Contacts Assigned to Sub-community Roles" on page 149](#)
 - ["Editing a Sub-community" on page 150](#)
 - ["Deleting an Inactive Sub-community" on page 150](#)
- ["Working with Companies and Contacts" on page 151](#)
 - ["Moving Divisions Between Companies" on page 151](#)
 - ["Changing the Name of the Divisions Tab" on page 152](#)

- [“Deleting Companies or Contacts” on page 153](#)
- [“Disabling Companies or Contacts” on page 155](#)
- [“Enabling Companies or Contacts” on page 157](#)
- [“Registering or Re-registering a Company” on page 159](#)
- [“Downloading a PDF for Company or Contact Profiles” on page 164](#)
- [“Sending a Company for TGO Provisioning” on page 166](#)
- [“Viewing Company and Registration Audit Data” on page 168](#)
- [“Viewing Contact Audit Data” on page 169](#)
- [“Subscribing Your Company to AIC” on page 169](#)
- [“Updating File Upload Custom Fields Using .Zip Files” on page 170](#)

Company and Contact Overview

Active Community provides several ways to define companies and contacts. The method used depends on the situation. With the appropriate permissions, you can:

- Create companies and contacts one at a time.
- Import company or contact information using a comma-separated value (.csv) file. Active Community uses the imported company or contact data to populate values on the company or contact profile pages.

Important: You must import companies into your community *before* you import contacts.

- Create public web forms that gather information about contacts who are not yet part of a community.
- Use the optional Registration module, where the completed registration process creates companies and contacts.
- Use the Active Community API to create companies and contacts.

Before beginning the procedures in this section, you should review how tabs are used to control company and contact information.

Topics include:

- [“Companies List Tabs”](#)
- [“Company Tabs”](#)
- [“Contacts List Tabs”](#)
- [“Contact Tabs”](#)
- [“About Sub-Communities”](#)
- [“Integrated Communities - Restricted Characters for Core Fields”](#)
- [“How Do I?”](#)

Companies List Tabs

Available by clicking **Profiles** > **Companies**, the tabs on the Companies list page let you define information that relates to all companies in your community.

Note: Based on the permissions assigned to your security role, you might not see all tabs referenced in the following topics.



Companies List Tabs

- "Directory Tab"
- "Settings Tab"
- "Reports Tab"

Directory Tab

The Directory tab lists all companies in the Active Community community. Access this tab to perform searches, exports, and other company-related actions.

Settings Tab

The Settings tab lets you configure the company profile settings that apply to your community as a whole. The links on the tab let you define different types of information for *all* companies in your community. Links include:

- Summary Page—Define widgets that display on the Summary tab for a company in your community.
- Core Fields—Specify mandatory core fields that must be completed by each company in the community
- Core Field Permissions—Define the security roles that can view and modify company core fields.
- Custom Fields—Add, remove, or modify company profile custom fields and groups.
- Custom Field Permissions—Configure the security roles that can view and modify company custom fields.
- Alerts—Add and manage emails to companies in your community, including who to notify and when to notify them.
- Freshness—Configure how often company contacts are reminded to update their company profile information.

Reports Tab

The Reports tab lets you run or manage your reports, public reports created by others, and create new reports for your community.

Company Tabs

The Company Profile page for each company in your community includes a set of tabs that let you define and manage all data related to the company.



Company
■ "Summary Tab"
■ "Profile Tab"
■ "Divisions Tab"
■ "Contacts Tab"
■ "Projects Tab"
■ "Files Tab"
■ "Items Tab"
■ "Audit Log Tab"

Summary Tab

The Summary tab lets users view a high-level summary by seeing the widgets set up by the Community Administrator. In addition, links let you edit company information and add contacts to it.

Profile Tab

The Profile tab lists general information about a company, including its name, address, web URL, number of employees, and email address. It is the default tab for a company. Information is only visible if the fields are populated.

Divisions Tab

The Divisions tab lists child companies of a company, such as a sub-organization or account. Divisions are regular companies, but they provide a means of organizing companies within a community. Thus, any company that has divisions becomes a "parent company" and its divisions have a Parent Company ID.

Community Administrators can customize the tab name and use a word that is meaningful to their company, such as the word Accounts instead of Divisions. The customized word displays everywhere the word Divisions displayed before the change (see ["Changing the Name of the Divisions Tab" on page 152](#)).

Note: The Divisions tab is displayed only if Divisions are enabled in the community by the Community Administrator.

Contacts Tab

The Contacts tab lets you view, add, or search for contacts in the selected company.

Projects Tab

The Projects tab lists all projects in which the company participates, including the company's status in each project.

Files Tab

The Files tab lets you access folders and upload files that are relevant to the company.

Items Tab

The Items tab lets you search for and manage items for the company. The company must exist in Active Community before it can be associated with items. After being added to a company, the item is automatically viewable to users with View Items access.

Note: The Items tab is displayed only if Item Management is enabled for the community.

Audit Log Tab

The Audit Log tab lists all changes made to a company profile for the past 60 days, including a separate section that lists all registration requests related to the company profile. Users can download an Excel file of the company changes for up to a rolling 12 months as well as view details and print a report of the registration requests.

Contacts List Tabs

Available by clicking **Profiles > Contacts**, the tabs on the Contacts list page let you define information that relates to contacts in all companies in your community.

ALL CONTACTS	CORE FIELDS	CUSTOM FIELDS	ALERTS	PERMISSIONS	FRESHNESS	BUSINESS ROLES
---------------------	-------------	---------------	--------	-------------	-----------	----------------

Contacts List Tabs

- "All Contacts Tab"
- "Core Fields Tab"
- "Custom Fields Tab"
- "Alerts Tab"
- "Permissions Tab"
- "Freshness Tab"
- "Business Roles"

All Contacts Tab

The All Contacts tab lists all contacts in your community. You can search for, add, and manage contacts.

Core Fields Tab

The Core Fields tab lets you select mandatory core fields that must be completed by each contact in your community, such as Communication Email, title, phone number, etc.

Custom Fields Tab

The Custom Fields tab lets you add, remove, or modify contact profile custom fields and groups.

Alerts Tab

The Alerts tab lets you add and manage emails to contacts in your community, including who to notify and when to notify them.

Permissions Tab

The Permissions tab lists the custom field permission for each custom field group.

Freshness Tab

The Freshness tab lets you control the freshness settings, or update status of a profile, for contacts in your community.

Business Roles

The Business Roles tab lets you add and manage contact (business) roles in your community; for example, Legal or Primary Contact or Chief Financial Officer. Business roles help you identify functional contact types in a community.

Contact Tabs

The Contact Profile page for each contact in your community groups information about each contact into a series of tabs to let you manage all data related to the person.



Contact Tabs
■ "Profile Tab"
■ "Projects Tab"
■ "Activities Tab"
■ "Files Tab"
■ "Web Forms Tab"
■ "Audit Log Tab"

Profile Tab

The Profile tab lists general information about the contact, including name, address, and security and contact (business) roles. It shows core and custom fields for the contact.

Projects Tab

The Projects tab lists the projects in which the contact participates, including the contact's status in each project.

Activities Tab

The Activities tab lists all project activities assigned to the contact. Recent emails can be resent to the contact from the Activities tab.

Files Tab

The Files tab includes all files the contact uploaded to Active Community.

Web Forms Tab

The Web Forms tab includes all web forms the contact completed as part of project activities.

Audit Log Tab

The Audit Log tab lists all changes made to a contact profile for the past 60 days. Users can download an Excel file of the changes for up to a rolling 12 months.

About Sub-Communities

Sub-communities are mini-communities created inside a larger hub community. Sub-communities allow each department to work with a collection of companies, or a sub-community of companies, with which they interact on a regular basis. For example, contacts in supplier relations might want to work with a *supplier* sub-community. Contacts in brand management might want to work with a *sales* sub-community.

Integrated Communities - Restricted Characters for Core Fields

If you are integrated with TGO, you cannot use certain characters in your core fields. Refer to the following tables for the restricted characters.

Restricted Characters for Company Core Fields

Companies			
Active Comm Field	TGO Field	Synced Fields	Restricted characters
Company Name	Company Name	Company Name	? * , : —
Company ID			
Parent Company ID			
Website URL		website	
Email			
Phone	Telephone	Telephone	Only -+ () Allowed
Mobile			
Fax			
Address	Address Line 1	Address Line 1	— \$
Address 2		Address Line 2	
Address 3			
City	City/Town	City/Town	—
State/Province/Region	State/Province	State/Province	—
Postal Code	Zip/Postal Code	Zip/Postal Code	—
Country	Country	Country	—
Employees			
Notes			

Restricted Characters for Contact Core Fields

Contacts/Users			
Active Comm Field	TGO Field	Synced Fields	Restricted characters
Salutation			
First Name	First/Given Name	First/Given Name	* –
Last Name	Last/Family Name	Last/Family Name	* –
Company Name			
Title			
User ID	User ID (User Name)	User ID (User Name)	<>,; " [] \
Communication Email	Email	Email	<>,; " [] \
Phone	Telephone	Telephone	only -+ () allowed
Mobile			
Fax	Fax	Fax	
Address-1	Address Line 1	Address Line 1	– \$
Address-2	Address Line 2		
Address-3			
City	City/Town	City/Town	–
State/Province/Region	State/Province	State/Province	–
Postal Code	Zip/Postal Code	Zip/Postal Code	–
Country	Country	Country	–
Notes			

How Do I?

For companies and contacts, you need to understand the options that are available. The table lists a few options to consider.

To...	Choose (or use) the following options:	When you are:
Add Companies or Contacts		
Add companies and contacts individually	<ul style="list-style-type: none"> ■ Profiles > Companies 	"Adding Companies and Contacts Manually" on page 122
Add multiple companies and contacts at the same time	<ul style="list-style-type: none"> ■ Profiles > Companies > Manage Companies > Import Companies ■ Profiles > Contacts > Manage Contacts > Import Contacts 	"Importing Companies and Contacts Using CSV Files" on page 128
Work with Sub-communities		
Create a sub-community role	Admin > Security Roles tab > Add Security Role	"Creating a Security Role for a Sub-Community" on page 141
Add a sub-community	<ul style="list-style-type: none"> ■ Profiles > Companies > New Sub-community 	"Creating a Sub-community and Assigning Contacts and Roles" on page 141
Add companies to a sub-community	<ul style="list-style-type: none"> ■ Profiles > Companies > Select the companies > Actions > Add to Sub-communities ■ Profiles > Companies > Select the company > Manage Company > Edit Company > Sub-communities tab 	"Adding Companies to a Sub-community" on page 144
Remove companies from a sub-community	<ul style="list-style-type: none"> ■ Profiles > Companies > Select the sub-community > Select the companies to remove > Actions > Remove from Sub-communities ■ Profiles > Companies > Select the company > Manage Company > Edit Company > Sub-communities tab 	"Removing Companies from a Sub-community" on page 147
Define Custom Settings		
Update a company or community	<ul style="list-style-type: none"> ■ Profiles > Companies > Select a company > Divisions tab 	"Moving Divisions Between Companies" on page 151
	<ul style="list-style-type: none"> ■ Admin > Community Settings > Edit Community 	"Changing the Name of the Divisions Tab" on page 152
Delete Companies or Contacts		
Delete a company or contact	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Company > Delete Company, or ■ Select multiple companies > Actions > Delete Companies ■ Profiles > Contacts > <ul style="list-style-type: none"> ■ Select a contact > Manage Profile > Delete Contact, or ■ Select multiple contacts > Actions > Delete Contacts 	"Deleting Companies or Contacts" on page 153

To...	Choose (or use) the following options:	When you are:
Disable Companies or Contacts		
Disable companies or contacts	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Profile > Disable Company, or ■ Select multiple companies > Actions > Disable Companies ■ Profiles > Contacts > <ul style="list-style-type: none"> ■ Select a contact > Manage Profile > Disable Contact, or ■ Select multiple contacts > Actions > Disable Contacts 	"Disabling Companies or Contacts" on page 155
Enable Companies or Contacts		
Enable a company or contact	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Profile > Enable Company, or ■ Select multiple companies > Actions > Enable Companies ■ Profiles > Contacts > <ul style="list-style-type: none"> ■ Select a contact > Manage Profile > Enable Contact, or ■ Select multiple contacts > Actions > Enable Contacts 	"Enabling Companies or Contacts" on page 157
Register a Company		
Register a previously created company (send a company for registration)	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Profile > Send for Registration, or ■ Select multiple companies > Actions > Send Companies for Registration 	"Registering or Re-registering a Company" on page 159
Re-register a Company		
Re-register a company	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Profile > Re-register Company, or ■ Select multiple companies > Actions > Re-register Companies 	"Registering or Re-registering a Company" on page 159
Merge User IDs of Two Contact Profiles		
Merge user IDs of two contact profiles	<ul style="list-style-type: none"> ■ Home > Your Profile tab > Edit Profile 	"Merging User IDs" on page 41
Send a Company for TGO Provisioning		
Send a company for TGO provisioning so that the registration workflow can resume.	<ul style="list-style-type: none"> ■ Profiles > Companies > <ul style="list-style-type: none"> ■ Select a company > Manage Profile > Send for TGO Provisioning, or ■ Select multiple companies > Actions > Send for TGO Provisioning 	"Sending a Company for TGO Provisioning" on page 166
View Audit Data		

To...	Choose (or use) the following options:	When you are:
View company and registration audit logs	<ul style="list-style-type: none"> ■ Profiles > Companies > Select a company > Audit Log tab > Company Audit Log section ■ Profiles > Companies > Select a company > Audit Log tab > Registration Audit Log section 	"Viewing Company and Registration Audit Data" on page 168
View contact audit logs	<ul style="list-style-type: none"> ■ Profiles > Contacts > Select a contact > Audit Log tab 	"Viewing Contact Audit Data" on page 169
Subscribe to AIC		
Subscription to Active Invoices with Compliance (AIC)	<ul style="list-style-type: none"> ■ My Company> Legal Profiles tab 	"Subscribing Your Company to AIC" on page 169
Upload Multiple Files		
Upload multiple files for file upload custom fields	<ul style="list-style-type: none"> ■ Profiles > Companies > Manage Companies > Upload Files 	"Updating File Upload Custom Fields Using .Zip Files" on page 170

Adding Companies and Contacts Manually

These topics describe how to add companies and contacts to Active Community one at a time. A company must exist in Active Community before you can add contacts to it.

To import data for multiple companies and contacts, see ["Importing Companies and Contacts Using CSV Files"](#) on page 128.

Topics include:

- ["Adding a Company to Active Community"](#) on page 122
- ["Adding a Contact to a Company"](#) on page 124

Adding a Company to Active Community

Security permissions: Company Permissions > Add Companies

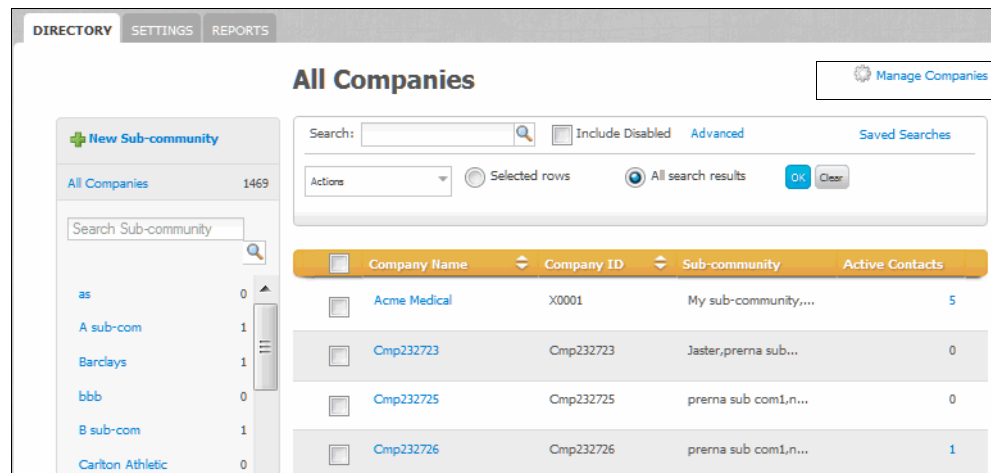
Use this procedure to define basic information about a company in your Active Community community.

Important: If you are integrated with TGO, you cannot use certain characters in your core fields. Refer to ["Integrated Communities - Restricted Characters for Core Fields"](#) on page 117.

To add a company manually

- 1 Click **Profiles > Companies**.

The All Companies list page opens.



- 2 Click **Manage Companies > Create a Company**.

The Adding New Company page opens. Required fields are indicated by an asterisk (*).

The screenshot shows a web form titled "Adding New Company" with a navigation menu on the left containing "Overview" (selected) and "Sub-communities". The form fields are arranged in two columns:

- Company Name *
- Company ID
- Parent Company ID
- Phone
- Fax
- Address-1
- Address-2
- Address-3
- City
- State / Province / Region
- Country
- Postal Code
- Email *
- Website url
- # Employees

3 Complete the company fields as follows:

- Company Name—Name of the company. Do not use quotation marks (") in the name. Required.
Note: If you type or select a company name that already exists, and move to another tab, a dialog box asks you to confirm that you want to create a company with a duplicate name. If you do, a unique company ID is required across the community.
- Company ID—Identifier for the company in letters and/or numbers; for example, "A123." This ID is used to link contacts to a company. It must be unique across the community. Required.
Note: If your community has selected "Auto-generate Company IDs" (Admin > Community Settings tab), an asterisk does not display, and you do not need to complete the field.
- Parent Company ID—Identifier for the parent company in letters and/or numbers; for example, "A123." Used if the company has one or more divisions under a parent company.
- Phone—Telephone number of the company; for example, 703-555-1212.
- Fax—Fax number of the company; example, 703-555-1212.
- Address 1, 2, and 3—Street address of the company.; example, "123 Your Street, Suite 123."
- City—Name of the city or town where the company is located; example, "Springfield."
- State/Province/Region—State or province code where the company is located; for example, "California." You can use auto-fill to pick a state or province from the standard ISO list of valid state or province codes if the company country is within the United States or Canada only. Active Community accepts other country and provinces, but does not validate this information. For a full list of valid countries, visit:

http://www.commondatahub.com/live/geography/state_province_region/iso_3166_2_state_codes.

- Country—Country code where the company is located. For example, "USA." You can use auto-fill to pick a country from the standard ISO list of valid countries. For a full list of valid countries, visit: http://www.commondatahub.com/country_source.jsp.
 - Postal Code—
 - For USA: Five- or nine-digit postal ZIP code where the company is located. For example, "22033" or "22033-1412."
 - For others: Active Community accepts any value; it does not validate the format.
 - Email—General company email address; for example, web@acme.com.
 - Web Site—URL of the web site of the company; for example, http://www.example.org.
 - # Employees—Number of employees in the company; for example, "500."
 - Notes—Type additional notes or comments you want to add to the profile.
- 4 To add the new company to one or more sub-communities:
- a Click the **Sub-communities** tab.
 - b Select check boxes for the sub-communities to which you want to add the company.
- 5 Perform the appropriate action:

To...	Do this:
Save basic company data and edit custom field groups at another time	<ul style="list-style-type: none"> ■ Click Save.
Save basic information and edit custom field groups immediately	<ol style="list-style-type: none"> 1 Click Save and Edit. 2 Select the custom field tabs and update that information. 3 Click Save after updating each custom field group.

Adding a Contact to a Company

Security permissions:

- Contact Permissions > Add, Edit Contact
- or

- My Contacts Permissions > Add, Edit My Company Contacts

Use this procedure to add a contact person to a company profile. A company must exist in Active Community before you can add a contact to it.

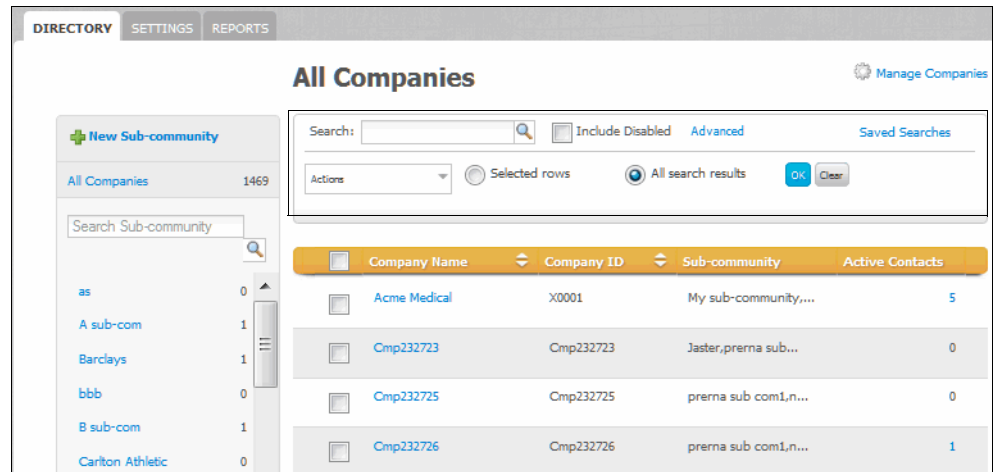
Note: Active Community automatically gives the security role of Everyone to contacts added to the community. For details, see "[Editing Permissions for Community Security Roles](#)" on page 56.

Important: If you are integrated with TGO, you cannot use certain characters in your core fields. Refer to "[Integrated Communities - Restricted Characters for Core Fields](#)" on page 117.

To add a contact to a company

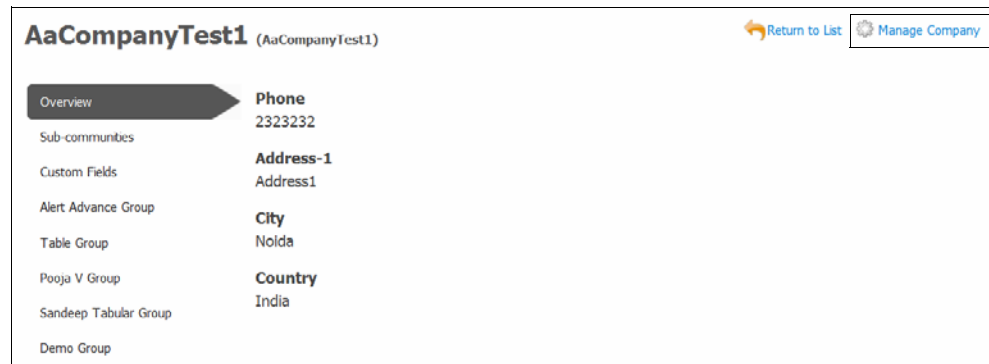
- 1 Click **Profiles > Companies**.

The All Companies list page opens.



- 2 Search for and select the company to which you want to add the contact.

- 3 On the company profile page, click **Manage Company > Add Contact**.



Note: You can also select the **Summary** tab, then click **Add Contact**.

The Adding New Contact page opens. Required fields are indicated by an asterisk (*). Part of the page is shown here.

Adding New Contact for AaCompanyTest1 (AaCompanyTest1)

Overview
Business Roles
Security Roles

Photo

First Name *
Last Name *
Salutation
Title
Company Name *
AaCompanyTest1 (AaCompanyTest1)
Communication Email *
Phone
Mobile
Fax
Address-1

4 Complete the contact fields as follows:

- First Name—Required. First name of the contact; for example, "John."
- Last Name—Required. Last name of the contact; for example, "Smith."
- Salutation—Form of address or title of the contact; for example, "Mr."
- Title—Title of the contact's position in the company; for example, "Senior Marketing Director."
- Communication Email—Required. Communication Email of the contact; for example, sue.jones@example.org.

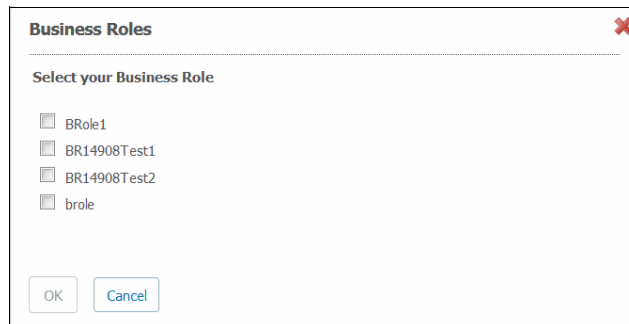
Note: When the contact is added, the system creates a user ID identical to the Communication Email. A user ID must be unique across *all* communities, so if a user ID with the same name already exists in the system, the system creates a random user ID. If a contact wants to represent two companies, the contact can merge the user IDs so that both profiles can be accessed with one user ID. See "[Merging User IDs](#)" on [page 41](#).

- Phone—Main telephone number of the contact; for example, 703-555-1212.
- Mobile—Mobile phone number of the contact. For example, 703-555-1212.
- Fax—Fax number of the contact; for example, 703-555-1212.
- Address-1/Address-2/Address-3—Street address of the contact, which might be the same as the company street address. For example, "123 State Street, Suite 123."

- City—City or town where the contact is located; for example, “Springfield”
- State/Province/Region—State or province code where the company is located. For example, “California.” You can use auto-fill to pick a state or province from the standard ISO list of valid state or province codes if the company country is within the United States or Canada only. Active Community accepts other country provinces, but does not validate this information. For a full list of valid countries, visit:
http://www.commondatahub.com/live/geography/state_province_region/iso_3166_2_state_codes.
- Country— Country code where the company is located, for example, “UK.” You can use auto-fill to pick a country from the standard ISO list of valid countries. For a full list of valid countries, visit:
http://www.commondatahub.com/country_source.jsp.
- Postal Code—
 - For USA: Five- or nine-digit postal ZIP code where the company is located. For example, “22033” or “22033-1412.”
 - For others: Active Community accepts any value; it does not validate the format.
- Notes—Type additional notes or comments you want to add to the profile.

5 Click **Save**.

The contact is added to the company, and the Business Roles pop-up opens.



6 Do one of the following:

- If you want to assign one or more business roles to the contact, select the check boxes for the desired business roles. Click **OK**. The contact is assigned the selected business roles in addition to the default business role of Contact.
- If you do not want to assign any business role to the contact, click **Cancel**. The contact is assigned the default business role of Contact.

Tabs for the contact are listed at the top of the page so more information can be defined (or automatically populated) for the contact later.

Note: After a contact is added, the user ID and Account Email fields display for a contact’s profile. Only the owning user is permitted to change their user ID and their Account Email. Community Administrators cannot change either of them; they can only view them.

To update a contact profile, see “[Updating a Contact Profile](#)” on page 31.

Importing Companies and Contacts Using CSV Files

Values for new companies and contacts can be imported into your community using comma-separated value (.csv) files. Active Community uses the imported data to populate values in company and contact profiles. You can edit the data for companies or contacts with unique requirements.

Important: Ensure the company is defined in your community before importing contacts that you want to assign to the company. The company *must* be defined before importing contacts.

Companies can be added to one or more sub-communities via the import process as long as they have already been created (see [“Working with Sub-communities” on page 140](#)). The sub-community names must be separated by commas in the .csv file. The .csv file must conform to the guidelines in [“Custom Field Requirements for Importing Data” on page 133](#)

During the import process, you are prompted to map or link each column header in your .csv file to a field that exists in profiles. The column header can be the name of a core field, such as Last Name, or it can be a custom field specific to your community, such as Hire Date.

After mapping the data, Active Community shows a preview of the company or contact information to be imported. The preview prevents you from importing information into the wrong field.

Review the following topics before you create .csv files to import company or contact data.

Topics include:

- [“General Guidelines for Importing Data” on page 128](#)
- [“Company Requirements for Importing Data” on page 130](#)
- [“Contact Requirements for Importing Data” on page 131](#)
- [“Custom Field Requirements for Importing Data” on page 133](#)
- [“Custom Field Requirements for Data Tables” on page 134](#)
- [“Importing Company or Contact Data” on page 135](#)
- [“Updating File Upload Custom Fields Using .Zip Files” on page 170](#)

Important: If you are integrated with TGO, you cannot use certain characters in your core fields. Refer to [“Integrated Communities - Restricted Characters for Core Fields” on page 117](#).

General Guidelines for Importing Data

Follow these guidelines for using a .csv file to import company and contact information:

- Active Community expects imported information in a comma-separated value (.csv) format; for example, contactdata.csv.
 - To save an Excel file in .csv format, click **Save As**. In the Save as type drop-down list, select CSV (Comma Delimited). Click **Save**.
- Header Rows—The first row of the file must contain the same column headings that are mandatory in the user interface.

- For example, for contacts, it would be Last Name, First Name, Communication Email, and Company ID. User ID is only mandatory when using the import to update profiles.
- For example, for companies, it would be Company Name and Company ID.
- **Body Rows**—The data values to be imported must start in the second row of the file. For example, Jones, Bob, bob.jones@example.com, CFO, ABC123, mycomp_id.

	A	B	C	D	E	F
1	Last Name	First Name	Communication Email	Title	Company Name	Company ID
2	Jones	Bob	bob.jones@example.com	CFO	ABC123	mycomp_id
3	Smit	John	john.smit@example.com	Sales Director	ABC123	mycomp_id
4	Dexter	Lea	lea.dexter@example.com	Operations Supervisor	ABC123	mycomp_id
5	Potter	Silas	silas.potter@example.com	Community Admin	ABC123	mycomp_id

The parts of the file:

Key	Description
1	Header row.
2	Body row.

- Use either upper or lower case letters for most values. Only custom field values are case sensitive.
- Use commas, tabs, or pipes to separate the information in each column.
 - Important:** To avoid errors during the import process, do not use these characters: # (pound) or : (colon), or paragraph returns (line breaks).
- Before importing the file, remove blank rows between data rows.
- Include a thousand or fewer contacts or companies in each .csv file. To import more than 1000, create separate .csv files to improve import performance. For example, if you have 7000 contacts to import, arrange the data in seven .csv files that contain 1000 contacts each.
- For imports that are creating profiles, at a minimum, all mandatory fields must be represented in the .csv files.

Date Field Format

Date fields must be formatted as follows: MM/DD/YYYY. For example, January 7, 2009 should be entered as 01/07/2009 in the .csv file.

If not formatted correctly, dates cause errors during the import process.

Standard ISO Codes

To import companies or contacts located in the United States or Canada, use standard ISO country or state codes. For example, if the country is USA then a company located in the state of California must include a state field with a value of either CA or California.

Disabling Imported Companies or Contacts

To disable contacts or companies by import, include a Disable Contact or Disable Company column with the value of "TRUE" for each row of contact or company data in the .csv file.

To disable companies or contacts in Active Community, see [“Disabling Companies or Contacts” on page 155](#).

Importing Company Data when Registering or Re-registering a Company

If a company is in the registration or re-registration process, the company profile is locked until registration is complete. If you attempt to import data while a profile is locked, the email that you receive for the rejected profiles states the reason the import failed.

In addition to these general guidelines, please see:

- [“Company Requirements for Importing Data” on page 130](#)
- [“Contact Requirements for Importing Data” on page 131](#)
- [“Custom Field Requirements for Importing Data” on page 133](#)
- [“Importing Company or Contact Data” on page 135](#)

Company Requirements for Importing Data

In addition to the requirements in [“General Guidelines for Importing Data,”](#) follow these company-specific guidelines for using a .csv file to import company data:

Required Fields

At a minimum, you *must* include these core fields in the .csv file:

- Company Name
- Company ID—Company IDs are treated as characters, not numbers. For example, an ID of “0010” is not the same as an ID of “10.” The first two zeroes are not removed automatically.

Core Company Fields

The following core company fields can be included in the .csv file, but they are optional:

Parent Company ID	State/Province/Region
Email	Postal Code
Phone	Country
Fax	Website URL
Address-1	# Employees
Address-2	Disable Company
Address-3	Notes
City	

Custom Fields

Custom fields that are defined for a company can be included in the .csv file. They must conform to the guidelines in [“Custom Field Requirements for Importing Data” on page 133](#). For custom fields saved in the File Upload format, see [“Updating File Upload Custom Fields Using .Zip Files” on page 170](#).

Sub-communities

Companies can be added to one or more sub-communities via the import process as long as they have already been created (see [“Working with Sub-communities” on page 140](#)). The sub-community names must be separated by commas in the .csv file. The .csv file must conform to the guidelines in [“Custom Field Requirements for Importing Data” on page 133](#).

L	M	N	O	P	Q	R	S	
ss 3	Postal Coc	City	State / Pr	Country	# Employees	Disabled	Sub-Community	CF in
	22033	Fairfax	VA	USA	750		Nestle hub,Mantas corp	
	35004	Alton	Alabama	United Sta	400		Nestle hub,Mantas corp	

Repeating Field Values

With one exception, fields cannot be repeated in the file; that is, you cannot use two or more rows with the same Company ID.

If, however, you are importing profile data for purposes of updating a custom field table, company IDs can be repeated (see [“Importing Company or Contact Data” on page 135](#)).

Contact Requirements for Importing Data

In addition to the requirements in [“General Guidelines for Importing Data,”](#) follow these contact-specific guidelines for using a .csv file to import contact data:

Required Fields

At a minimum, you *must* include these core fields in the contact data file:

- Last Name
- First Name
- Communication Email—A contact’s specific email at their Company, for example, sue.jones@acme.com.
- Company ID—The Company ID value must match a company in your community for each contact in the file.
- User ID—The user ID is only mandatory when using the import to *update* profiles.

Important: If the Company ID does not exist in your community, you must import or create the company first, then import the contacts.

Core Contact Fields

The following core contact fields can be included in the .csv file, but they are optional:

Salutation	City
Title	State/Province/Region
Company Name	Postal Code
Phone	Country
Mobile	Disable Contact
Fax	Notes

Address-1 Business Role
 Address-2 Security Role
 Address-3

Custom Fields

Custom fields that are defined for contacts can be included in the .csv file. They must conform to the guidelines in ["Custom Field Requirements for Importing Data"](#) on page 133.

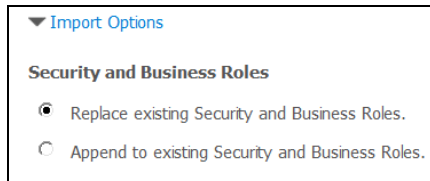
Security Roles and Business Roles

To specify security roles (permissions role) and business roles (a contact's functional or organizational role in their business), include *Security Role* and/or *Business Role* columns with the name (or names) of the security roles and/or business roles. If a contact has two or more roles, separate the roles with a comma (role A,role B).

	A	B	C	D	E	F	G	H
1	Last Name	First Name	Communication Email	Title	Company Name	Company ID	Security Role	Business Role
2	Jones	Bob	bob.jones@example.com	CFO	ABC123	mycomp_id	Everyone	Finance
3	Smit	John	john.smit@example.com	Sales Director	ABC123	mycomp_id	Everyone	Sales Director
4	Dexter	Lea	lea.dexter@example.com	Operations Supervisor	ABC123	mycomp_id	Everyone	Operations
5	Potter	Silas	silas.potter@example.com	Community Admin	ABC123	mycomp_id	Community Administrator,Everyone	Contact

If you are updating contact information, before you begin:

- Decide if you want to replace existing roles or add to them.



- Replace existing Security and Business Roles.**

For example, if there is only one business role for a user in the import file and the user has three business roles, the import file overwrites the three business roles. After the import, the user has only one business role.

If there is only one security role for a user in the import file and the user has two security roles, the import file overwrites the two security roles. After the import, the user has only one security role.

- Append to Existing Security and Business Roles.**

For example, if there is only one business role for a user in the import file and the user has three business roles, the import file adds the additional business role to the existing three business roles. After the import, the user has four business roles.

If there is only one security role for a user in the import file and the user has two security roles, the import file adds the additional security role to the existing two security roles. After the import, the user has three security roles.

- Ensure the contact (business) role is defined in your community before importing contacts you want to assign to the role. For details, see ["Adding a Contact \(Business\) Role"](#) on page 75.

- If the contact (business) role is not specified when importing contacts, Active Community assigns a default business role called Contact. After importing, you can change the business role by editing the contact's profile.
- Ensure the security role is defined in your community before importing contacts you want to assign to the security role (Admin > Security Roles tab). The security role *must* be defined before importing contacts. The import cannot create new security roles.

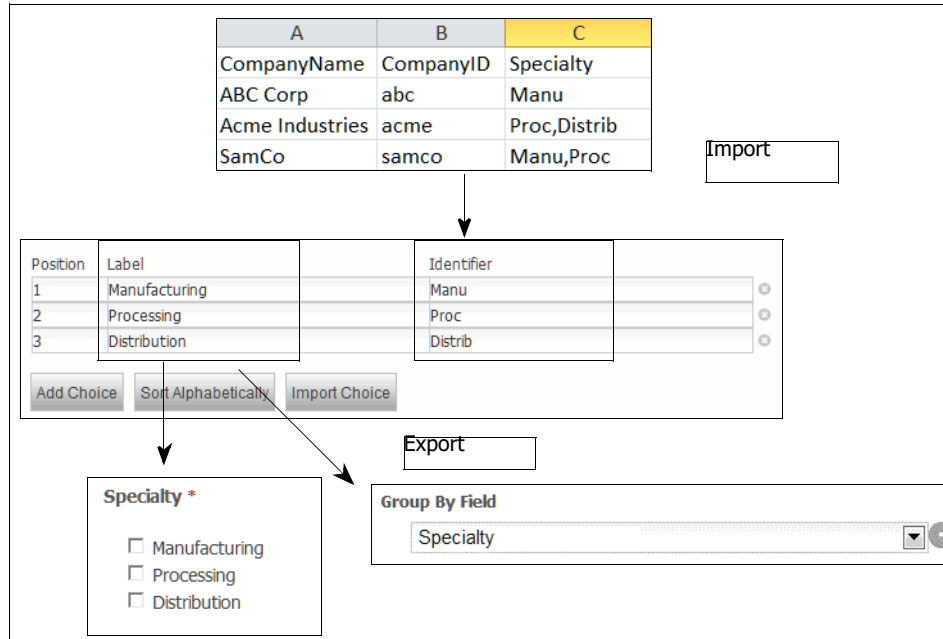
Custom Field Requirements for Importing Data

In addition to the requirements in ["General Guidelines for Importing Data,"](#) follow these guidelines for using a .csv file to import values for custom fields for companies or contacts.

Note: Because the .csv format does not support file uploads, see ["Updating File Upload Custom Fields Using .Zip Files" on page 170](#) for custom fields saved in the File Upload format.

- Create and configure the custom field groups, questions, and choices in the community *before* importing companies or contacts. For example, if you have a column in your company import file called "Certification Status" that details the company's certification status, the same custom field ("Certification Status") must exist in the company's profiles.
- Custom field values are case-sensitive. Values in the .csv file must match the values defined in the profiles. For details, see an example of importing custom field values (see ["Custom Field Requirements for Data Tables" on page 134](#)).
- Make sure cells for required custom fields are not blank. If values are missing from a cell, there is no data to import.
- In the .csv file, use a comma to separate values for multiple choice answers.
- Do not use an import file to update multiple choice questions that include data. The import file *overwrites* the existing choices. To avoid this situation, the import file should include the choices a company has defined and that the choices be separated with a comma (choiceA,choiceB).
- For multiple choice custom fields, Active Community uses values in the *Identifier* column when importing data. It does not use values in the Label column.
 - Identifier values are unique internal numbers or letters that are associated with the answer to a question. Identifiers can be used for cross-tabulating results.

- Label values display in the user interface for Drop List, Multiple Choice, or Radio Button List custom field questions. They are also used when exporting results out of Active Community.



For example, for Labels named Manufacturing or Processing, the values in the Identifier field might be Manu or Proc. In the screen shot, both Sam Co and Comfortex have more than one Specialty.

	A	B	C
1	Company Name	Company ID	Specialty
2	Sam CO	samco	Manu, Proc
3	Arc Ski Equipment	asequ	Manu
4	Comfortex	cmftx	Proc, Distr

Note: If you edit a .csv file using a text editor like Notepad, be sure multiple choice answers are surrounded by double quotation marks; for example, "Sometimes."

- See also ["Custom Field Requirements for Data Tables"](#) on page 134 and ["Updating File Upload Custom Fields Using .Zip Files"](#) on page 170.

Custom Field Requirements for Data Tables

Custom fields groups that are formatted to display as data tables have special requirements. All custom field questions in the field group display as column headings in a table.

Data tables allow for multiple answers to each question. They also enable data sharing.

In addition to the requirements in ["General Guidelines for Importing Data"](#) on page 128 and ["Custom Field Requirements for Importing Data"](#) on page 133, follow these guidelines for custom field groups that are data tables.

- Decide if you want to replace existing custom fields or add to them.
 - Replace existing custom fields or

- *Append* additional custom fields to existing custom fields
- Put data table values for custom fields in a separate .csv files. For example, if you want to include values for a data table and values for another custom field group, you should put the data table values in one .csv file and the remaining custom field values in a separate .csv file.
- Import each .csv file separately.
- Include core company profile fields in each row, such as Company Name and Company ID.
- Include *columns* in the .csv file that correspond to the column headings (questions) in the table.

In the graphic, the .csv file includes core company profile files in the CompanyName and CompanyID columns. It shows how the values for the ABC Company display in the company profile after the values for the custom field questions are imported.

	A	B	C	D	E
1	CompanyName	CompanyID	Owner Name	U.S. Citizen?	Percentage Ownership
2	ABC	abc	Alex Smith	Yes	25
3	ABC	abc	Marjorie Brown	Yes	25
4	ABC	abc	Simon Lawrie	No	50

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	yes	25
2	Marjorie Brown	Yes	25
3	Simon Lawrie	No	50

The parts of the file:

Key	Description
1	Core field values.
2	Custom field values.

- Include values for each *row* in the table. Each row should contain the values that you want displayed in each table row. Values for core profile fields (such as Company Name and Company ID) should be repeated in each row of the .csv file.

Importing Company or Contact Data

Security permissions:

- Company Permissions > Import Companies
- Sub-community Permissions > Import Companies
- Contact Permissions > Import Contacts

Important: Make sure the file meets the format requirements specified in ["General Guidelines for Importing Data"](#) on page 128.

Use this procedure to import companies or contacts into Active Community.

Companies can be added to one or more sub-communities via the import process as long as they have already been created (see ["Working with Sub-communities"](#) on page 140). The sub-community names must be separated by commas in the

.csv file. The .csv file must conform to the guidelines in ["Custom Field Requirements for Importing Data"](#) on page 133

To import companies or contacts into Active Community

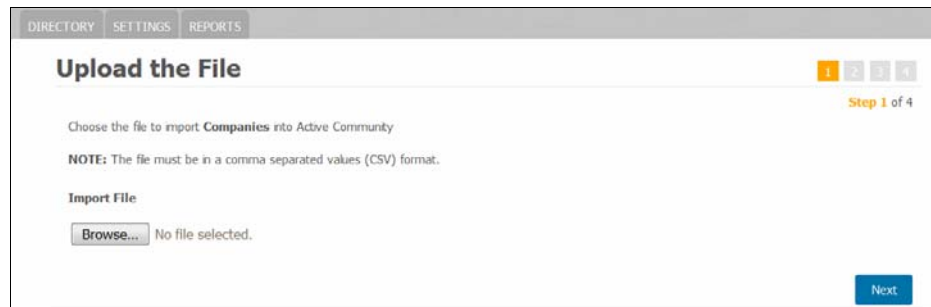
- 1 After creating a data file based on the guidelines in ["General Guidelines for Importing Data"](#) on page 128 and the other requirements topics, click **Profiles > Companies** (or **Contacts**).
- 2 Perform the appropriate action:

If you selected...	Do this:
Companies	<ul style="list-style-type: none"> ■ Click Manage Companies > Import Companies.
Contacts	<ul style="list-style-type: none"> ■ Click Manage Contacts > Import Contacts.

Important: If importing contacts, ensure each contact in the file has a corresponding Company ID in Active Community. If the company does not exist, import the company or manually create the company first, then import the contacts.

One of the following occurs:

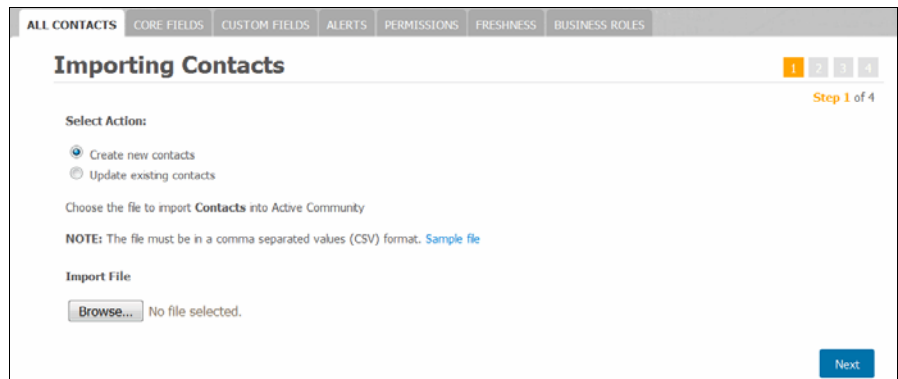
- Companies - The Upload the File page opens.



- Contacts - The Importing Contacts page opens.

Select one of the following:

- Create new contacts - The **Sample file** link displays. Click the link to open or save the create_import.csv file to your machine to be used as a template for your own import.
- Update existing contacts - The **Sample file** link displays. Click the link to open or save the update_import.csv to your machine to be used as a template for your own import.



- Click **Browse** to navigate to the file to be imported. Select the file, and click **Open**.

The name of the csv file displays.

- Click **Next**.

The Map the Fields page opens so you can use the drop-down lists to map or link the fields in your .csv file to the fields in the user interface.

The screenshot shows the 'Map the Fields' page with a table mapping CSV columns to database fields. The table is as follows:

	A	B	C	D	E	F
1	Last Name	First Name	Communication Email	Title	Company Name	Company ID
2	Jones	Bob	bob.jones@example.com	CFO	ABC123	mycomp_id
3	Smit	John	john.smit@example.com	Sales Director	ABC123	mycomp_id
4	Dexter	Lea	lea.dexter@example.com	Operations Supervisor	ABC123	mycomp_id
5	Potter	Silas	silas.potter@example.com	Community Admin	ABC123	mycomp_id

The interface on the left includes dropdown menus for: First Name, Last Name, User ID, Communication Email, Title, Salutation, Phone, Mobile, Fax, Address-1, Address-2, Address-3, Postal Code, City, State / Province / Region, Country, Notes, Disabled, Company Name, Company ID, Business Role, Parent Company, Parent Company ID, and Security Role. Arrows indicate the mapping from the table to these fields.

- In the drop-down lists, specify the required, core, and custom fields in your .csv file that correspond to the fields user interface.

Note: If you set up your Company ID to be mapped to a custom field, the Company ID does not display on this page because it is automatically mapped.

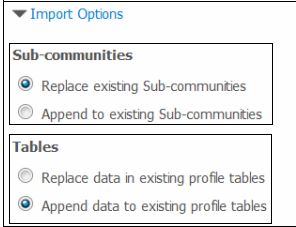
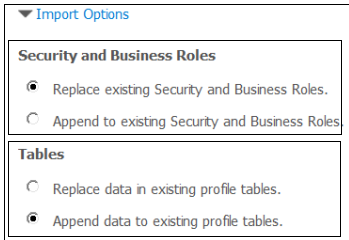
Important: The data you are importing must comply with the data format of the mapped field. For example, do not map a column of Street Addresses (letter and numbers) to a Hire Date (DD/MM/YYYY) field (all numbers).

IGNORE is the default value for any core or custom fields that do not automatically match a column header value in the .csv file. If a field is not included in the .csv file because you are not importing it, keep the default

IGNORE setting for that field. The only time you need to perform manual mapping is if the column header and field names do not match exactly.

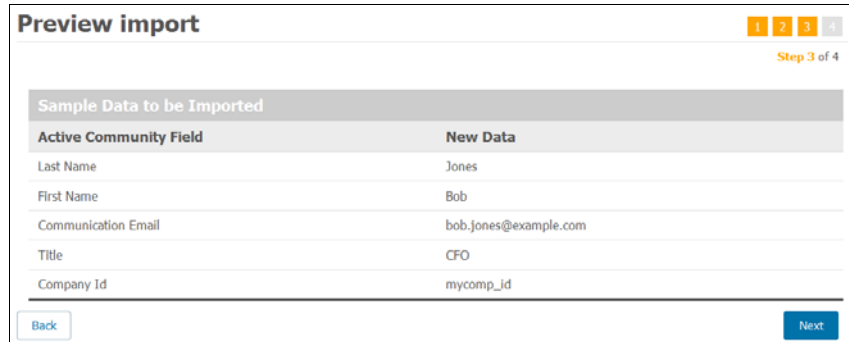
Note: If your contact profile does not have the Community Administrator role, custom fields contained in tabs to which you do not have View and Edit Question Group permissions are not available for mapping. For details, see ["Editing Permissions for Community Security Roles" on page 56](#).

6 Optional.

If you are importing data for...	Do this:						
Companies	<p>1 At the bottom of the Map the Fields page, click Import Options.</p> <p>2 For sub-communities, indicate if the file you are importing replaces sub-communities in existing company profiles (Replace), or if it adds sub-communities to the profiles (Append).</p> <p>3 For tables, indicate if the file you are importing replaces data in existing company profiles (Replace), or if it adds data to the profiles (Append).</p>  <table border="1"> <thead> <tr> <th>Key</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Indicate if the imported sub-communities replace existing sub-communities or add to existing ones.</td> </tr> <tr> <td>2</td> <td>Indicate if the imported data replaces existing data or adds to it.</td> </tr> </tbody> </table>	Key	Description	1	Indicate if the imported sub-communities replace existing sub-communities or add to existing ones.	2	Indicate if the imported data replaces existing data or adds to it.
Key	Description						
1	Indicate if the imported sub-communities replace existing sub-communities or add to existing ones.						
2	Indicate if the imported data replaces existing data or adds to it.						
Contacts	<p>1 At the bottom of the Map the Fields page, click Import Options.</p> <p>Note: This option applies only when <i>updating</i> contacts.</p> <p>2 For security and business roles, indicate if the file you are importing replaces security and business roles in existing contact profiles (Replace), or if it adds security and business roles to the profiles (Append).</p> <p>3 For tables, indicate if the file you are importing replaces data in existing contact profiles (Replace), or if it adds data to the profiles (Append).</p>  <table border="1"> <thead> <tr> <th>Key</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Indicate if the imported roles replace existing roles or add to them.</td> </tr> <tr> <td>2</td> <td>Indicate if the imported data replaces existing data or adds to it.</td> </tr> </tbody> </table>	Key	Description	1	Indicate if the imported roles replace existing roles or add to them.	2	Indicate if the imported data replaces existing data or adds to it.
Key	Description						
1	Indicate if the imported roles replace existing roles or add to them.						
2	Indicate if the imported data replaces existing data or adds to it.						

7 Click Next.

The Preview Import page opens. It shows the first valid row of your file with the Active Community fields you mapped. If you have contact information in your file that is to overwrite an existing profile, Before and After columns show how the profile will change after you import your file.



Note: If you are importing data tables, this page does not open.

8 Click Next.

The Import Queue page opens and a message notifies you your import file was added to the queue for processing.

9 To work in Active Community while the import file is being processed, click the **Go to Companies or Go to Contacts link.**

After the file has been processed, Active Community sends you an email notification detailing the number of rows that were successfully or unsuccessfully imported.

- 10 To troubleshoot errors, in the email, click **Download Reject CSV File.** Examine the Error Messages column for hints about how to fix the invalid data.**
- 11 To view your imported data, go to the Contacts or Companies pages (**Profiles > Companies or Contacts**).**

Working with Sub-communities

Sub-communities are a collection of companies created inside a hub community. Sub-communities allow each department to work with a sub-community of companies with which they interact on a regular basis. For example, contacts in supplier relations might want to work with a *supplier* sub-community. Contacts in brand management might want to work with a *sales* sub-community.

Sub-community membership can be manual or automated based on a single field value (condition). See ["Creating a Sub-community and Assigning Contacts and Roles" on page 141.](#)

Topics include:

- ["Creating a Security Role for a Sub-Community" on page 141](#)
- ["Creating a Sub-community and Assigning Contacts and Roles" on page 141](#)
- ["Adding Companies to a Sub-community" on page 144](#)
- ["Removing Companies from a Sub-community" on page 147](#)

- [“Viewing Contacts Assigned to Sub-community Roles”](#) on page 149
- [“Editing a Sub-community”](#) on page 150
- [“Deleting an Inactive Sub-community”](#) on page 150

Creating a Security Role for a Sub-Community

Security role: Community Administrator

Security permission: Community Permissions > Manage Community

To create a security role for a sub-community

- 1 Follow the instructions in [“Adding a Custom Security Role”](#) (Admin > Security Roles tab). See [“Adding a Custom Security Role”](#) on page 65.
- 2 Select the permissions to assign to the role. If you want the role to be able to:
 - Create new sub-communities, under Community Permissions > select the **Add Sub-community** check box.
Note: If selected, the role is considered sub-community Administrator.
 - Edit sub-community properties, under Sub-community Permissions > select the **Manage Sub-communities** check box.
- 3 Click **Save**.
- 4 Assign the sub-community security role to a contact in the hub community as described in [“Assigning a Security Role to a Contact Profile”](#) on page 73.
- 5 Go to [“Creating a Sub-community and Assigning Contacts and Roles”](#) on page 141.

Creating a Sub-community and Assigning Contacts and Roles

Permission: Add Sub-community

Use this procedure to create a sub-community and assign contacts and security roles to the sub-community.

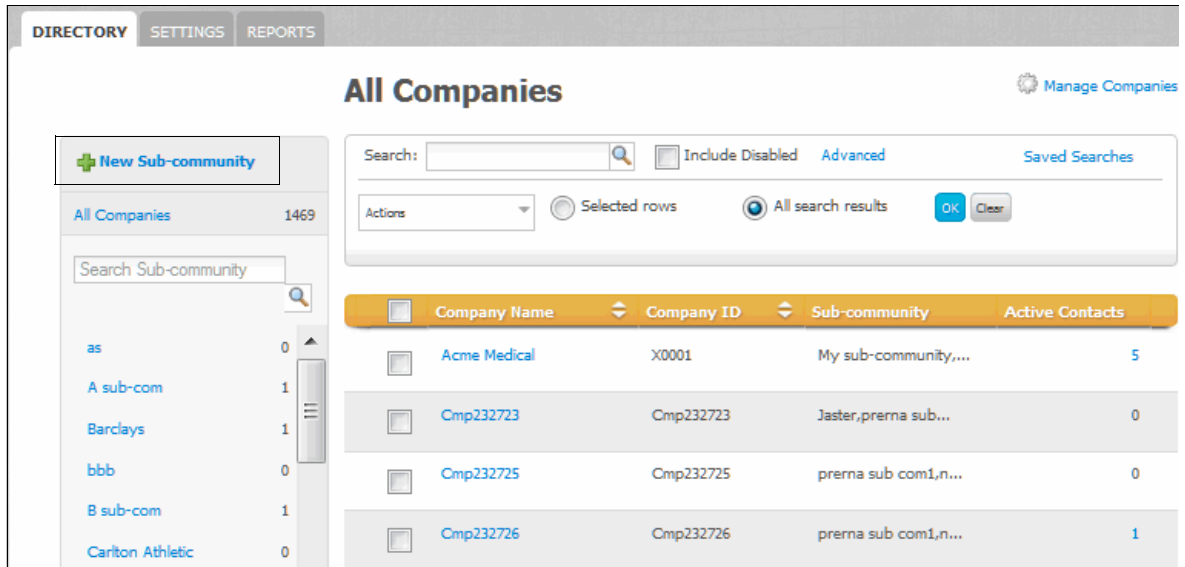
- A maximum of 100 sub-communities can be created in a hub community.
- The contact who creates the sub-community is added to the sub-community automatically, but can be removed.
- All Community Administrators are automatically added as sub-community administrators.

Important: In addition to the role created in [“Creating a Security Role for a Sub-Community,”](#) at least one Community Administrator role must be selected for a sub-community. By default, contacts in the Community Administrator role can access all companies in all sub-communities.

To create a sub-community and assign contacts and roles

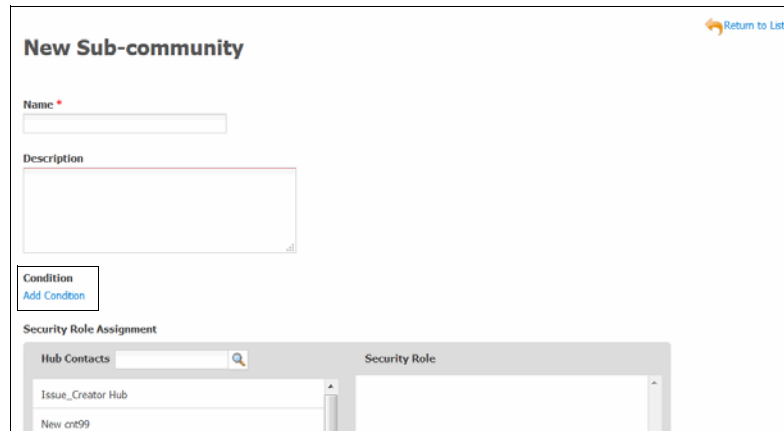
- 1 Click **Profiles > Companies**.

The All Companies list page opens.



2 Click New Sub-community.

The New Sub-community page opens.



3 In Name, type a name for the sub-community.

4 In Description, type a description of the sub-community.

5 Do one of the following:

- To create a sub-community where membership is manual, go to [step 6](#).
- To create a sub-community that automates membership based on a condition, click **Add Condition**.

The Condition section expands.

The screenshot shows a web interface for creating a new sub-community. At the top, there are tabs for 'DIRECTORY', 'SETTINGS', and 'REPORTS'. The main heading is 'New Sub-community' with a 'Return to List' link. Below the heading, there are three main sections: 'Name', 'Description', and 'Condition'. The 'Name' field contains 'Dark Chocolate Sub-community'. The 'Description' field contains the text: 'All the companies with Chocolate Type = Dark should be assigned to this sub-community'. The 'Condition' section is expanded and shows three dropdown menus: 'Chocolate Info - Chocolate Type', 'Is Equal to', and 'Dark'.

- a In the first drop-down list, select a field on which to base the condition for sub-community membership.
- b In the next drop-down list, select the operator that describes how you want Active Community to apply the condition, such as Contains or Is Equal to (not all operators are available for all fields).
- c In the last text field/drop-down list, type or select the remaining part of the condition

Note: For Multiple Choice type custom fields, you can select more than one value from the drop-down list.

Any company is automatically added to this sub-community when the condition is met and the changes are saved.

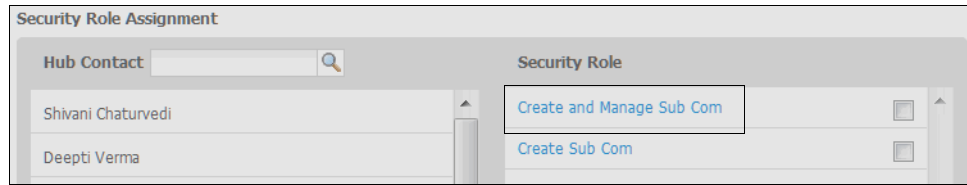
Note: You cannot change the condition of a sub-community once it has at least one company (spoke) assigned to it.

- d Continue to [step 6](#).
- 6 Use the Hub Contact search box to find the hub contacts you want to access the sub-community.

The screenshot shows a 'Security Role Assignment' dialog box. It has a search box labeled 'Hub Contact' with a magnifying glass icon. Below the search box is a list of contacts: Shivani Chaturvedi, Deepthi Verma, Remove Contact, Nivedita Sharma, chintu dd, cnt259 Lawson, Deepali Bhatt, and Pranay Verma. To the right of the list is a vertical scrollbar. The dialog box is titled 'Security Role' and has a vertical scrollbar on the right side.

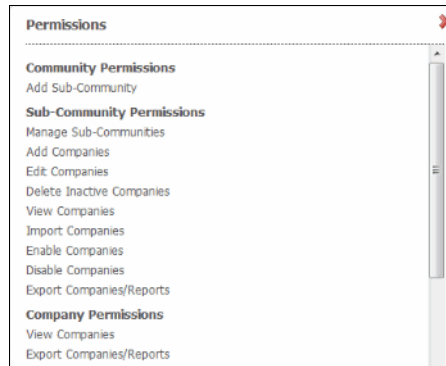
- 7 Select a contact.

The security roles that can be assigned to the contact display in the Security Role column.



- 8 To view the permissions that are assigned to the role:
 - a Under Security Role, click the link.

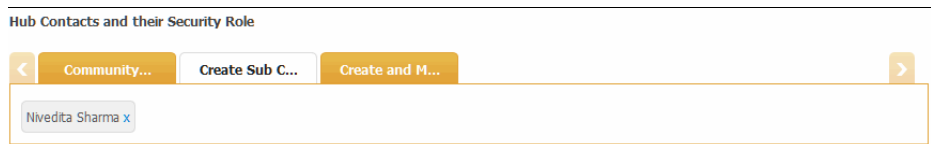
A pop-up window opens and lists the permissions assigned to the role.



- b Click **X** to close the pop-up window.
- 9 Select the check boxes for one or more roles you want to assign to the contact in the sub-community.

Important: At least one Community Administrator role must be selected for a sub-community.

The Community Administrator tab is the first tab at the bottom of the page. It lists the contact assigned to the role for the hub community. For each security role selected, a new tab displays. The tab lists the security role and the contacts assigned to the role.



- 10 Click **Save**.
- The sub-community is added to the directory list on the Company Directory page.
- 11 Go to ["Adding Companies to a Sub-community"](#) on page 144.

Adding Companies to a Sub-community

Permission: Add Sub-community

After ["Creating a Sub-community and Assigning Contacts and Roles"](#) on page 141, use this procedure to add a company to a sub-community:

- From the All Companies list page (Directory tab), add one or more companies to one or more sub-communities.
- From a company's profile page, add that company to one or more sub-communities.
- A company is automatically added to that sub-community when it's field value meets the condition defined for membership in the sub-community.

Note: You cannot manually add a company to a sub-community where membership is based on a condition.

You can also import companies and add them to one or more sub-communities using a .csv file, separating the sub-communities by commas in the appropriate column. The sub-communities must already exist before importing the companies.

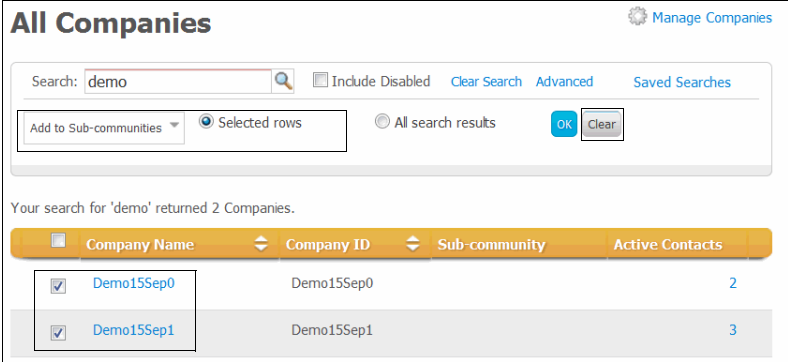
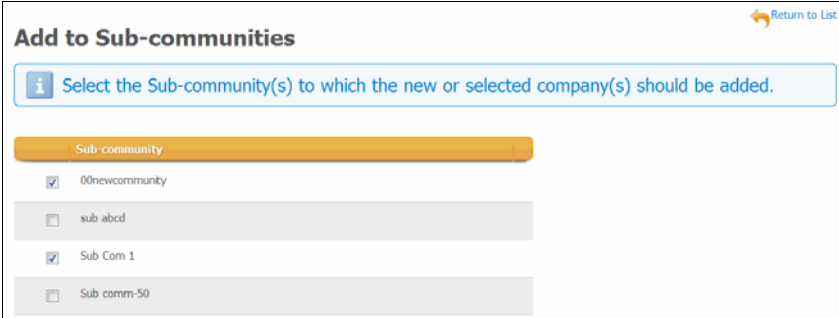
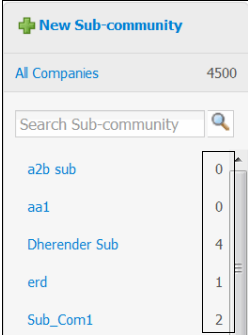
See ["Importing Companies and Contacts Using CSV Files"](#) on page 128.

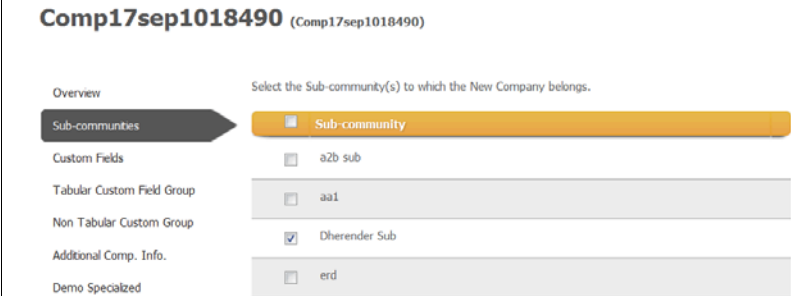
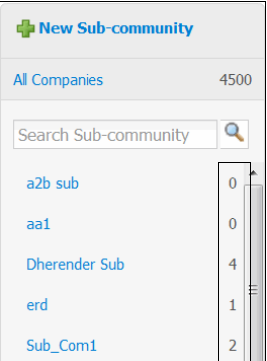
To add companies to a sub-community

- 1** Click **Profiles > Companies**.

The All Companies list page opens.

2 Perform the appropriate action:

If you want to add...	Do this:
<p>One or more companies to one or more sub-communities</p> <p>Using All Companies list page (Directory tab)</p>	<ol style="list-style-type: none"> 1 Search for the company or companies that you want to add to one or more sub-communities. 2 Select the check boxes for the companies you want to add to one or more sub-communities.  <ol style="list-style-type: none"> 3 Click the Actions drop-down list, select Add to Sub-communities, and click OK. The Add to Sub-communities page opens.  <ol style="list-style-type: none"> 4 Select check boxes for the sub-communities to which you want to add the companies, and click Save. <p>Note: Since you cannot manually add a company to a sub-community where membership is based on a condition, the check boxes for these sub-communities are unavailable.</p> <p>The company is added to the selected sub-communities. The number of companies in each sub-community is updated on the All Companies list page (Directory tab).</p> 

If you want to add...	Do this:
<p>One company to one or more sub-communities</p> <p>Using company's profile page</p>	<ol style="list-style-type: none"> 1 Search for and click the name of the company that you want to add to one or more sub-communities. The company's profile page opens. 2 Click Manage Company > Edit Company. The Edit Profile page opens to the Overview tab. 3 Click the Sub-communities tab. A list of sub-communities displays. 4 Select check boxes for the sub-communities to which you want to add the company, and click Save. Note: Since you cannot manually add a company to a sub-community where membership is based on a condition, the check boxes for these sub-communities are unavailable.  <p>The company is added to the selected sub-communities. The number of companies in each sub-community is updated on the All Companies list page (Directory tab).</p> 

Removing Companies from a Sub-community

Permission: Manage Sub-community

Use this procedure to remove a company from a sub-community:

- From the All Companies list page (Directory tab), remove one or more companies from a sub-community.
- From a company's profile page, remove that company from one or more sub-communities.
- A company is automatically removed from that sub-community when it's field value no longer meets the condition defined for membership in the sub-community.

Note: You cannot manually remove a company from a sub-community where membership is based on a condition.

To remove companies from a sub-community

1 Click **Profiles > Companies**.

The All Companies list page opens.

2 Perform the appropriate action:

If you want to remove...

One or more companies from a sub-community

Using All Companies list page (Directory tab)

Do this:

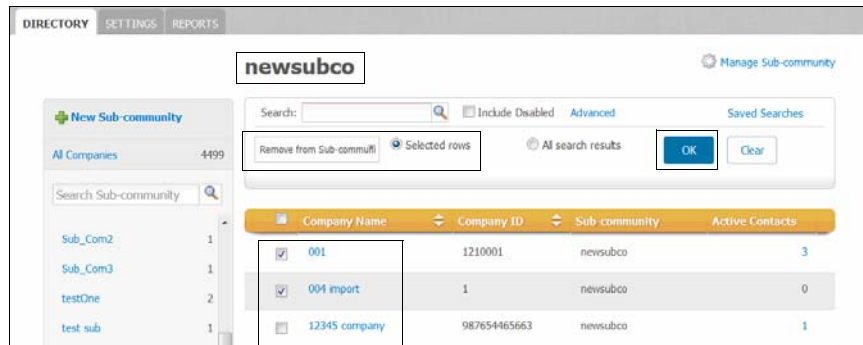
1 Click the link of the sub-community from which you want to remove one or more companies.

The companies that belong to that sub-community display.

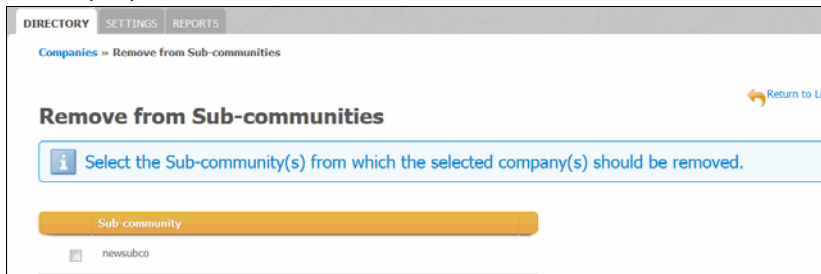
2 Select check boxes for the companies you want to remove from the sub-community.

3 From the Actions drop-down menu, select **Remove from Sub-communities**, and click **OK**.

Note: Since you cannot manually remove a company from a sub-community where membership is based on a condition, the check boxes for these sub-communities are unavailable.



The Remove from Sub-communities page opens. It lists the sub-communities from which the company can be removed.



4 Select the sub-community from which you want to remove the company, and click **Save**.

The company is removed from the sub-community.

If you want to remove...	Do this:
<p>One company from one or more sub-communities</p> <p>Using company's profile page</p>	<ol style="list-style-type: none"> 1 Search for and click the name of the company that you want to remove from a sub-community. The company's profile page opens. 2 Click Manage Company > Edit Company. The Edit Profile page opens to the Overview tab. 3 Click the Sub-communities tab. A list of sub-communities displays. 4 Clear the check boxes of the sub-communities from which you want to remove the company, and click Save. Note: Since you cannot manually remove a company from a sub-community where membership is based on a condition, the check boxes for these sub-communities are unavailable. <div data-bbox="491 684 1286 982" data-label="Image"> </div> <p>The company is removed from the selected sub-communities. The number of companies in each sub-community is updated on the All Companies list page (Directory tab).</p> <div data-bbox="491 1058 756 1417" data-label="Image"> </div>

Viewing Contacts Assigned to Sub-community Roles

Permission: Manage Sub-community

Use this procedure to view hub contacts assigned to sub-community roles.

Important: At least one Community Administrator role must be selected for a sub-community.

To view contacts assigned to sub-community roles

- 1 Click **Profiles > Companies**.
The All Companies list page opens.
- 2 Click the link for the sub-community for which you want to view contacts by role.

- 3 Click **Manage Sub-community**, then **Edit Sub-community**.
The Edit Sub-community page opens.
Tabs display for each security role.
- 4 Click the tab for the security role.
The tab lists the contacts that are assigned to the role.

Editing a Sub-community

Permission: Manage Sub-community

Use this procedure to add contacts to (or delete contacts from) a sub-community or change other sub-community information.

Note the following:

- You can only add a condition to sub-community or modify the existing condition if there are no companies assigned to the sub-community.
- If membership is automated via a condition and at least one company belongs to the sub-community (because the condition is met), you cannot edit it until all companies have been removed from the sub-community.

To add edit a sub-community

- 1 Click **Profiles > Companies**.
The All Companies list page opens.
- 2 Click the link for the sub-community you want to edit.
- 3 Click **Manage Sub-community**, then **Edit Sub-community**.
The Edit Sub-community page opens.
- 4 Edit sub-community properties or modify the contact information as described in ["Creating a Sub-community and Assigning Contacts and Roles"](#) on page 141.

Deleting an Inactive Sub-community

Permission: Add Sub-community

Use this procedure to delete a sub-community, including company and contact *assignments* to the sub-community.

Note: Companies and contacts are not deleted from the hub community—just from the sub-community.

To delete a sub-community

- 1 Click **Profiles > Companies**.
The All Companies list page opens.
- 2 Click the link for the sub-community you want to delete.
- 3 Click **Manage Sub-community**, then **Delete Sub-community**.
The message asks you to confirm the deletion of the sub-community.
- 4 Click **Delete**.
The sub-community is deleted.

Working with Companies and Contacts

Depending on your user permissions, you can perform many actions related to companies and contacts in your community.

Topics include:

- ["Moving Divisions Between Companies" on page 151](#)
- ["Changing the Name of the Divisions Tab" on page 152](#)
- ["Deleting Companies or Contacts" on page 153](#)
- ["Disabling Companies or Contacts" on page 155](#)
- ["Enabling Companies or Contacts" on page 157](#)
- ["Registering or Re-registering a Company" on page 159](#)
- ["Downloading a PDF for Company or Contact Profiles" on page 164](#)
- ["Sending a Company for TGO Provisioning" on page 166](#)
- ["Viewing Company and Registration Audit Data" on page 168](#)
- ["Viewing Contact Audit Data" on page 169](#)
- ["Subscribing Your Company to AIC" on page 169](#)

Moving Divisions Between Companies

Security permission: My Company Permissions > Edit My Company Divisions

You can move divisions between companies by modifying the parent company ID for a division. This can be accomplished by using either the user interface or the Active Community API.

Topics include:

- ["Modifying the Parent Company ID" on page 151](#)
- ["Modifying the Parent Company ID using the API" on page 152](#)

Modifying the Parent Company ID

To modify the Parent Company ID

- 1 Click **Profiles > Companies >** and navigate to the company whose division you want to move.
- 2 Click the **Divisions** tab.

A list of the divisions for the company displays. For example:

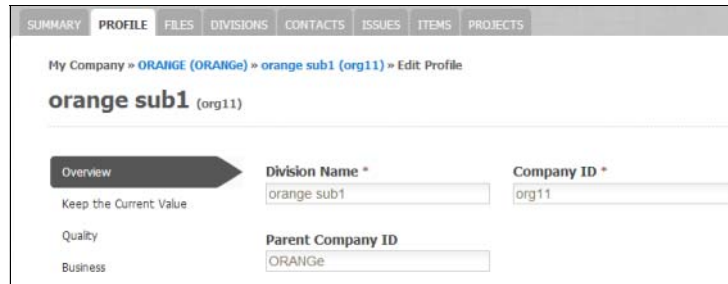
Division Name	ID	Active Contacts
asdf	org112	(0 Active Contacts)
orange sub1	org11	(1 Active Contact)
orange sub2	org22	(0 Active Contacts)
Slice	SLICE	(4 Active Contacts)
Srixon	Srixon123	(0 Active Contacts)

- 3 Click the name of the division you want to move to a different parent company (for example, orange sub1).

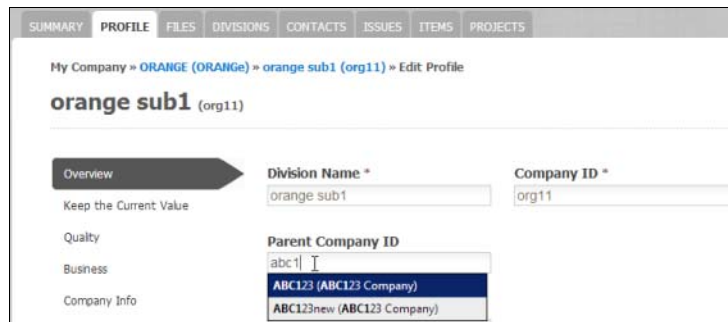
The profile for that division displays.



- From the Manage Company drop-down list, select **Edit Company**. The Edit Profile page for the division displays.



- In the Parent Company ID box, clear the selection, and type the first few characters of the new parent company ID (for example, abc1). A drop-down list displays with selections that match the characters you typed. Select an ID from the list.



- Click **Save**.
The division has been moved under the new parent company.

Modifying the Parent Company ID using the API

The Active Community API can be used to:

- Create a new division.
- Move a division under a different existing parent company by updating the parent company ID for the division.

For more details, see the *OpenText Active Community API Documentation*.

Changing the Name of the Divisions Tab

Security permission: My Company Permissions > Edit My Company Divisions

Community Administrators can modify the label of the Divisions tab so the word is meaningful to their company, such as using the word Accounts instead of Divisions.

For all users, the word displays everywhere the word Divisions displayed before the change.

To modify the division tab name

- 1 Click **Admin** > **Community Settings** tab.

The Community Settings page opens.

- 2 Click **Edit Community**.

The Edit Community Settings page opens.

The screenshot shows the 'Edit Community Settings' page. Under 'Global Preferences', the following fields are visible:

- Community: ORANGE
- Web Address: https://qaorange.rs.qa.gxsonline.net
- Enable Company Divisions:
- Division Label: Accounts
- Session Timeout (minutes): 90
- Support Email Address: test+qaorange_support@litqaweb1.com
- Allowed Gateway(s): [Configure IP Addresses](#)

- 3 Under Global Preferences, in the Division Label box, type the new label.

Note: The custom label cannot be more than 20 characters.

In this example, Divisions has been changed to Accounts.

- 4 Click **Save**.

A message indicates that your update is successful.

In the company profile, the tab name is now Accounts, the name of the page is Accounts, and the button name is Add Accounts.

The screenshot shows the company profile page for 'AAAA (833800008)'. The 'ACCOUNTS' tab is selected in the navigation bar. The page title is 'Accounts of AAAA (833800008)'. A '+ ADD ACCOUNTS' button is visible. Below the main content area, it says 'No accounts were found.'

Deleting Companies or Contacts

Security permissions:

- Community Permissions > Delete Active Profile, or
- Company Permissions > Delete Inactive Companies, or
- My Company Permissions > Delete My Company Contacts, or
- Contact Permissions > Delete Inactive Contacts

Use this procedure to permanently delete companies and contacts from your community.

Important: Use caution when performing this procedure. When you delete a company or contact, Active Community deletes all:

- Divisions (company only)
- Contacts, including items they created:
 - Projects
 - Activities
 - Web Forms
 - Saved Searches
 - Custom Exports
 - Reports
 - Tags
 - Alerts
 - Email templates

It also removes:

- Contacts from activities
- Posts and topics created by contacts (Workspace only)

Note: Once the data is deleted, it cannot be retrieved. Before deleting the data, you should export it; this ensures that the data is available in the event that you need it in the future.

Contacts in the Community Administrator role, the current user, or contacts associated with open registration requests cannot be deleted.

To delete companies or contacts

- 1 Click **Profiles > Companies** or **Contacts**, and search for the contact or company you want to delete.

The companies or contacts list page opens.

- 2 Perform the appropriate action:
 - To delete multiple companies, go to step 3.
 - To delete one company, go to step 4.
- 3 To delete one company or contact:
 - a View the company or contact profile.
 - b In the Manage Company or Manage Profile drop-down list, click **Delete custom fieldcustom fieldCompany** or **Delete Contact**.
A confirmation message opens.
 - c Go to step 5.
- 4 To delete multiple companies or contacts:

- a Click the Actions drop-down list, then select **Delete Companies** or **Delete Contacts**.

- To delete all companies or contacts, select **All Search Results**, then click **OK**.
- To delete specific companies or contacts, select the check boxes of the companies or contacts you want to delete, select **Selected Rows**, and click **OK**.

A confirmation message opens.

- b Go to step 5.

- 5 Perform the appropriate action:

If the message indicates...	Do this:
The contact cannot be deleted....	<ul style="list-style-type: none"> ■ Click OK. <p>You have finished the procedure.</p>
Deleting a contact(s) or companies permanently does the following....	<ol style="list-style-type: none"> 1 Read and understand the significance of the permanent deletion. 2 Select the "Yes, I want to delete the companies/contacts" check box. 3 Click Delete.

Disabling Companies or Contacts

Security permissions:

- Company Permissions > Disable Companies
- Sub-community Permissions > Disable Companies
- Contact Permissions > Disable Contacts

When you disable companies or contacts, they are no longer active members of the community and cannot receive future communications. While their records are unavailable, a historical record of their participation in community activities is kept for future reference. For example, so you can view their past responses to surveys.

When you disable a contact, the contact cannot:

- Complete activities
- Receive emails from the community
- Be added to a project as a participant or team member
- Update their contact profile

When you disable a company, all company divisions and contacts are also disabled.

You can also disable companies or contacts by ["Importing Companies and Contacts Using CSV Files."](#)

Topics include:

- ["Disabling a Company"](#)
- ["Disabling a Contact" on page 156](#)

Disabling a Company

To disable a company

- 1 Click **Profiles > Companies**, and search for the company or companies that you want to disable. For details, see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#).
- 2 Perform the appropriate action:
 - To disable multiple companies, go to step 3.
 - To disable one company, go to step 6.
- 3 Select the check boxes for the companies you want to disable.
- 4 Click the Actions drop-down list, then select **Disable Companies**.
- 5 At the confirmation message, click **Disable Companies**. You have finished the procedure.
- 6 Open the profile of the company you want to disable. Click **Manage Profile > Disable Company**.



- 7 Click **Disable** in the confirmation message.
The company is disabled. All divisions and contacts within the companies are disabled, so contacts cannot receive communications from the community.
Note: To enable a company, see ["Enabling Companies or Contacts" on page 157](#).

Disabling a Contact

To disable a contact

- 1 Click **Profiles > Contacts**, and search for the contact or contacts that you want to disable. For details, see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#).
Note: You cannot disable a contact who has been assigned the Community Administrator role.
- 2 Perform the appropriate action:
 - To disable multiple contacts, go to step 3.
 - To disable one contact, go to step 6.
- 3 Select the check boxes for the contacts you want to disable.
- 4 Click the Actions drop-down list, then select **Disable Contacts**.
- 5 At the confirmation message, click **Disable Contacts**. You have finished the procedure.

- 6 Open the profile of the contact you want to disable. Click **Manage Profile > Disable Contact**.



- 7 Click **Disable** in the confirmation message.

The contact is disabled and cannot receive communications from the community. In addition, the contact cannot be added as a participant to a project and cannot complete activities.

Note: To enable a contact, see [“Enabling Companies or Contacts”](#) on page 157.

Enabling Companies or Contacts

When you enable companies or contacts, they become active members of the community and can participate in daily activities. Contacts can complete activities, receive email communications, and can be added as project participants. Enabled company and contact profiles can also be edited and updated.

You can also enable companies or contacts by [“Importing Companies and Contacts Using CSV Files”](#) on page 128.

Topics include:

- [“Enabling a Company”](#)
- [“Enabling a Contact”](#) on page 159

Enabling a Company

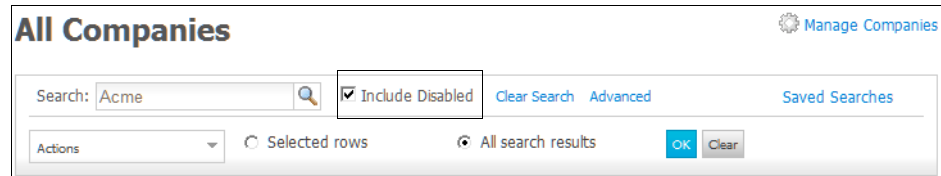
Security permissions:

- Company Permissions > Enable Companies
- Sub-community Permissions > Enable Companies

When you enable a previously disabled company, the company, its divisions, and its contacts are enabled.

To enable a company

- 1 Click **Profiles > Companies**, and search for the company or companies that you want to enable. Be sure to select the Include Disabled check box when you perform a search.



- 2 Perform the appropriate action:
 - To enable multiple companies, go to step 3.
 - To enable one company, go to step 5.
- 3 Select the check boxes for the companies you want to enable.
- 4 Click the Actions drop-down list, select **Enable Companies**, then click **OK**. You have completed the procedure.
- 5 Open the profile of the company you want to enable. Click **Manage Profile > Enable Company**.
- 6 Click **Enable** in the confirmation message.
The companies, divisions, and contacts within those companies are enabled.

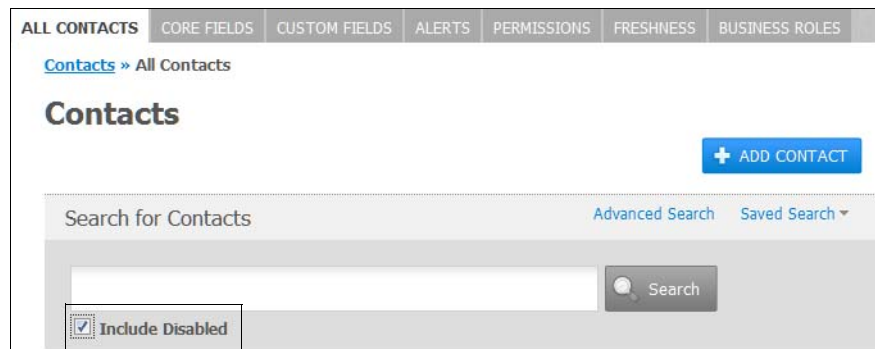
Enabling a Contact

Security permissions:

- My Company Permissions > Enable My Company Contacts
or
- Contact Permissions > Enable Contacts

To enable a contact

- 1 Click **Profiles > Contacts**, and search for the contacts that you want to enable. Be sure to select the Include Disabled check box when you perform a search.



- 2 Perform the appropriate action:
 - To enable multiple contacts, go to step 3.
 - To enable one contact, go to step 6.
- 3 Select the check boxes for the contacts you want to enable.
- 4 Click the Actions drop-down list, then select **Enable Contacts**.
- 5 At the confirmation message, click **Enable Contacts**. You have finished the procedure.
- 6 Open the profile of the contact you want to enable. Click **Manage Profile > Enable Contact**.



- 7 Click **Enable** in the confirmation message.
The contact is enabled and will receive communications from the community. In addition, the contact can be added as participants to a project and can be able to complete activities.

Registering or Re-registering a Company

Security roles: Registration Administrator

The procedures for registering a company and re-registering a company are very similar.

Registering a company

If a company profile is not created using the Registration workflow, the hub can use this procedure to send the company to registration at a later time. Sending the company to registration provides a way to collect data and/or refresh data while using the Registration workflow to ensure that the data is acceptable.

Companies are eligible to be sent to registration only if they are not integrated with TGO. After a company is successfully registered, it can be re-registered.

Note: While a company is in the registration process, the company profile cannot be edited until the registration process is complete.

You can also register companies by importing company profile information. See [“Importing Companies and Contacts Using CSV Files” on page 128.](#)

Re-registering a company

The hub can send a spoke company back through registration (for example, during an annual review process) by re-registering a company. Re-registration provides a way to collect data and/or refresh data while using the Registration workflow to ensure that the data is acceptable.

Companies are eligible for re-registration only if they are not integrated with TGO and were originally created via onboarding (using the Registration workflow).



Note: While a company is in the re-registration process, the company profile cannot be edited until the registration process is complete.

You can also re-register companies by importing company profile information. See [“Importing Companies and Contacts Using CSV Files” on page 128.](#)

Registration and Re-Registration Indicators

There are a number of indicators to help you identify a company that is in registration or re-registration.

- Companies whose registration or re-registration process has recently been initiated and are in process of being resent to Registration have an informational icon (i) after the company name on the list page.

<input type="checkbox"/>	Company Name	Company ID
<input type="checkbox"/>	001 	werty
<input type="checkbox"/>	00111100	22
 <input type="checkbox"/>	00145	123

- Companies that are currently locked due to registration or re-registration (profiles cannot be edited until the registration or re-registration process is complete) have a “padlock” icon after the company name on the list page.

<input type="checkbox"/>	Company Name	Company ID
<input type="checkbox"/>	001	werty
<input type="checkbox"/>	00111100	22
<input type="checkbox"/>	00145	123

- Companies whose profiles are locked due to registration or re-registration have an icon after the company name on the profile page.

SUMMARY PROFILE DIVISION CONTACTS PROJECTS AUDIT LOG

Company Directory » BaseCompany3 (BaseCompany3) » Details

Company is currently locked since it is sent for registration.

BaseCompany3 (BaseCompany3)

In addition, in the Notes section of the company profile, the following registration activity information displays:

- Re-register Count - The number of times the company has been resent for registration
- Re-register Status - The status of the most recent re-register action.

Notes	
Re-register Count 2	Re-register Status Requested

To register or re-register a company

- Click **Profiles > Companies**, and search for the company or companies that you want to register or re-register.
- Perform the appropriate action:
 - To register or re-register multiple companies, go to step 3.
 - To register or re-register one company, go to step 8.
- Select the check boxes for the companies you want to register or re-register.
- Click the Actions drop-down list, and select the appropriate option:
 - To register the companies, click **Send Companies for Registration**
 - To re-register the companies, click **Re-register Companies**.

A confirmation dialog box opens.

- 5 Select the appropriate check box to acknowledge that registering or re-registering the company(s) locks the company profile for editing until the registration process is complete:
 - **Yes, I want to send the company(s) for registration.**
 - **Yes, I want to re-register the company(s).**
- 6 Click **OK**.

A confirmation message indicates that your action is in process and that you will receive an email with the results.
- 7 Check your email to see the results of the registration or re-registration.

The following scenarios are possible:

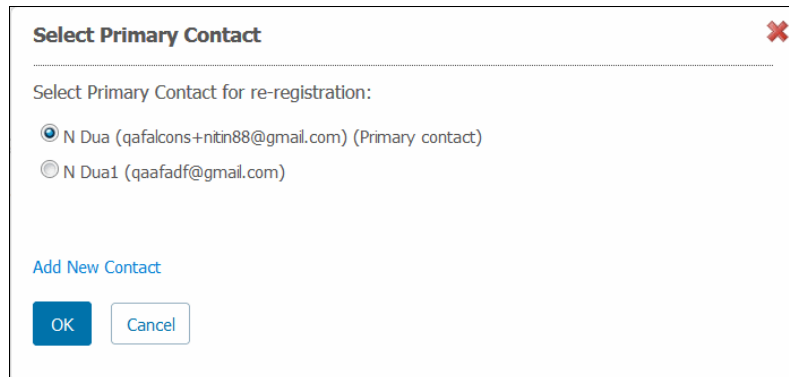
 - All of the selected companies are successfully sent or resent to registration. You have completed the procedure.
 - One or more of the companies cannot be registered or re-registered. Registration or re-registration cannot proceed if any of the following conditions exist.
 - In the case of re-registration, the company was not created via onboarding (using the Registration workflow).
 - The company does not have a primary contact.
 - The company does not have an active contact.
 - For companies with more than one contact, one or more of the contacts does not have a phone number.
 - The company is undergoing a Change Management process.
 - The company is already in the registration process and the profile is locked.

You have completed this procedure.
- 8 Open the profile of the company you want to register or re-register. Click **Manage Profile**, and select the appropriate option:
 - To register a company, click **Send for Registration**
 - To re-register a company, click **Re-register Company**.

A confirmation dialog box opens.
- 9 Select the appropriate check box to acknowledge that registering or re-registering the company locks the company profile for editing until the registration process is complete.
 - **Yes, I want to send the company for registration.**
 - **Yes, I want to re-register the company.**
- 10 Click **OK**.

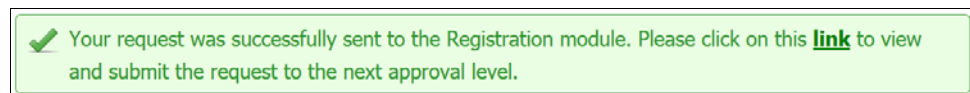
One of the following occurs:

- If the company has appropriate contact information, the Select Primary Contact dialog box opens. Go to step 11 to see your options for selecting a contact.



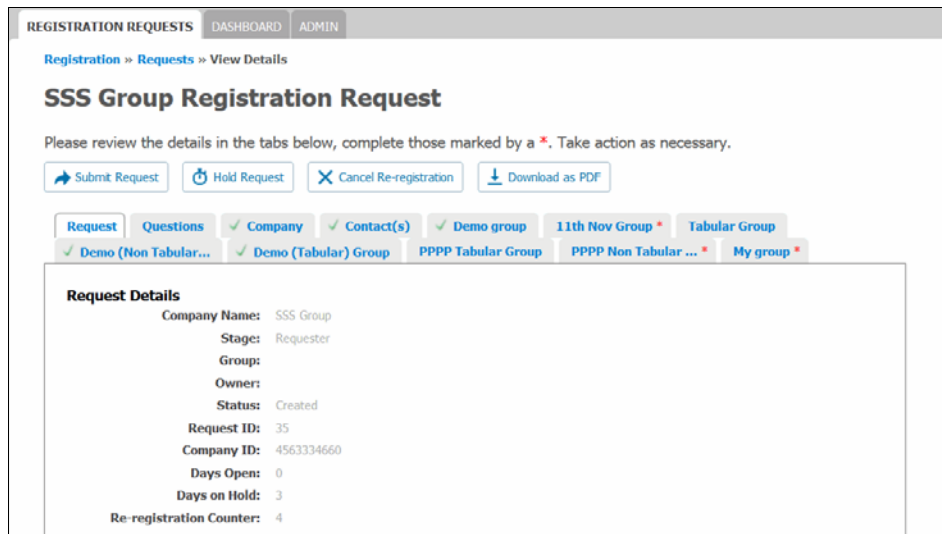
- If the company does not have contact information due to one of the following reasons, it cannot be registered or re-registered. Correct the error and repeat this procedure.
 - The company does not have an active contact.
 - For companies with more than one contact, one or more of the contacts does not have a phone number. If the company has only one contact without a phone number, and that contact is selected as the primary contact, the company can be re-registered.
- 11** Do one of the following to designate a primary contact:
- Keep the current primary contact for registration or re-registration (selected by default if there is a primary contact). Click **OK**.
 - To select a different contact as the primary contact for registration or re-registration, select a contact from the list of other contacts belonging to the company. Click **OK**.
 - To add a new contact to the company to use as the primary contact, click **Add New Contact**. For descriptions of the contact fields, see [step 4 on page 126](#) in the procedure “Adding a Contact to a Company.” After you have added the contact, return to this procedure.

After you select a primary contact and click OK, your request for registration or re-registration is successfully initiated and a success message displays.



- 12** Click the link in the success message to view and submit the registration request to the next approval level.

The Registration Request page opens for the company you are registering or re-registering.



- 13** Continue with the registration request approval process, [step 6 on page 487](#) in the procedure “[Creating a Request](#),” in [Chapter 14, “Registration Requests.”](#)”

Downloading a PDF for Company or Contact Profiles

Security permissions:

- Company Permissions > Export Companies/Reports

You can download company or contact profile information in a PDF file, selecting the field groups you want to include. Both core and custom fields can be downloaded.

Note: Security permissions control which fields are included in the PDF. If you do not have permission to view particular fields, they do not display in the PDF.

Topics include:

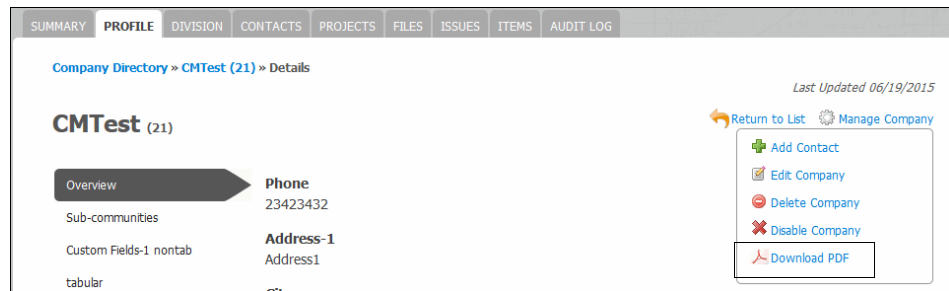
- “[Downloading a PDF for a Company Profile](#)”
- “[Downloading a PDF for a Contact Profile](#)” on page 165

Downloading a PDF for a Company Profile

To download a PDF for a company profile

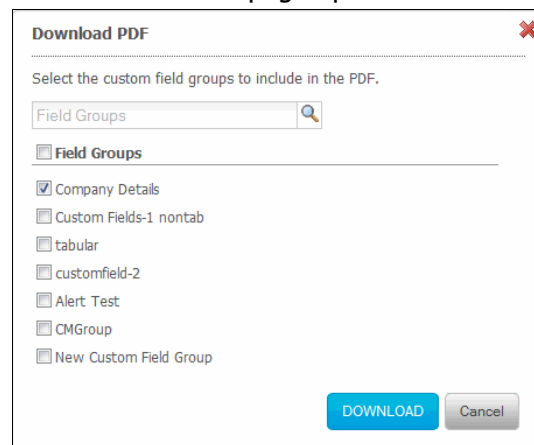
- 1** Click **Profiles > Companies**, and search for the company or companies whose profile you want to download. Be sure to select the Include Disabled check box when you perform a search.
- 2** Open the profile of the company.

The profile page opens.



3 Click Manage Company > Download PDF.

The Download PDF page opens.



- 4** Company Details is selected by default. To include custom field groups in the PDF, select the appropriate field group check boxes. Selecting the Field Groups check box selects all the field groups.
 - 5** To narrow the selection of field groups that display, begin typing the name of a field group in the search box, and only those field groups beginning with those letters display.
- Note:** Security permissions control which fields are included in the PDF. If you do not have permission to view particular fields, they do not display in the PDF.

6 Click Download.

A dialog box asks you if you want to open the file or save it.

7 Do one of the following:

- Select **Open with *selected program*** to open the file.
- Select **Save File** to save the file to your computer.

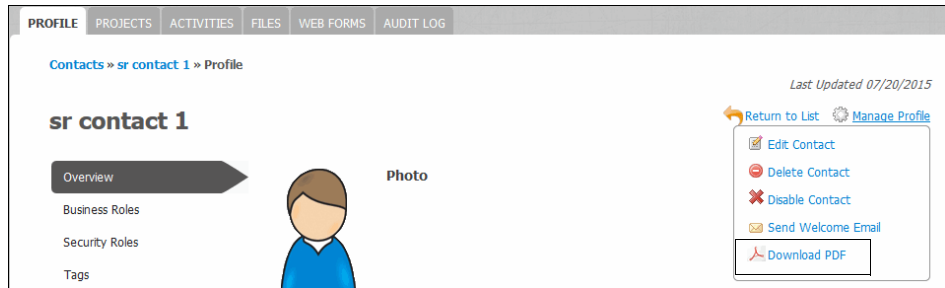
The profile fields are displayed in the file. The PDF file can be printed.

Downloading a PDF for a Contact Profile

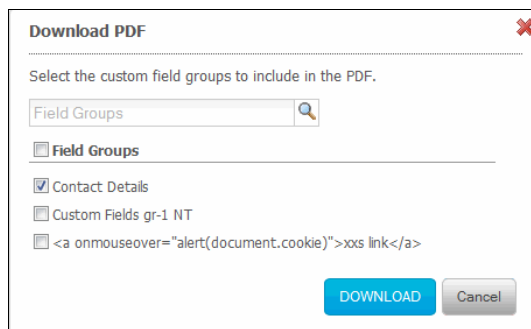
To download a PDF for a contact profile

- 1** Click **Profiles > Contacts**, and search for the contact whose profile you want to download. Be sure to select the Include Disabled check box when you perform a search.

- 2 Open the profile of the contact.
The profile page opens.



- 3 Click **Manage Profile > Download PDF**.
The Download PDF page opens.



- 4 Contact Details is selected by default. To include custom field groups in the PDF, select the appropriate field group check boxes. Selecting the Field Groups check box selects all the field groups.
- 5 To narrow the selection of field groups that display, begin typing the name of a field group in the search box, and only those field groups beginning with those letters display.
Note: Security permissions control which fields are included in the PDF. If you do not have permission to view particular fields, they do not display in the PDF.
- 6 Click **Download**.
A dialog box asks you if you want to open the file or save it.
- 7 Do one of the following:
 - Select **Open with *selected program*** to open the file.
 - Select **Save File** to save the file to your computer.

The profile fields are displayed in the file. The PDF file can be printed.

Sending a Company for TGO Provisioning

Security permissions:

Security roles: Company Permissions > Edit Companies

Companies created via registration and companies created in base can use this procedure to send a company for TGO provisioning. Companies created in base can be sent to TGO provisioning as long as all mandatory core fields required for registration are complete.

More than one company can be sent for TGO provisioning at the same time.

Note: This feature is available for hubs who are using Trading Grid Online (TGO) integrated with Active Community (AC).

Holding Registration Requests

For companies created via registration, typically all trading partner information approved through the registration workflow is automatically processed to TGO. However, a hub has the ability to automatically pause the registration process after all registration workflow approvals are complete so that they can store the ERP Id in Active Community before the profile data is processed to TGO. This ERP Id can be referred to by the hub while exchanging documents with trading partners within TGO.

Note: To enable this feature, the Registration Administrator must select the Hold Registration Request check box (**Applications > Registration > Admin tab > Registration Settings > TGO Settings**).

Once the ERP Id is updated in AC records, the hub can use one of the following methods to update the workflow status:

- Using an API call, the hub can update the workflow status from "Not Ready" to "Ready."
- Using the UI, the workflow status is automatically set to Ready when the hub sends the request to registration using the **Send for TGO Provisioning** action described in this procedure.

Either of these methods allows the registration workflow to continue and send the information to TGO.

To send a company for TGO provisioning

- 1 Click **Profiles > Companies**, and search for the company or companies that you want to send for TGO provisioning.
- 2 Perform the appropriate action:
 - To send multiple companies for TGO provisioning, select the check boxes for the companies you want to send for TGO provisioning, click the Actions drop-down list, and select **Send for TGO Provisioning**.
 - To send one company for TGO provisioning, open the profile of the company you want to send for TGO provisioning. Click **Manage Profile > Send for TGO Provisioning**.
- 3 In the confirmation dialog box, click **OK** to confirm that you want to send the company(s) to TGO provisioning.
- 4 One of the following occurs:
 - The company(s) are successfully submitted for TGO provisioning. This action automatically updates the status to Ready, and the company is immediately submitted to the registration workflow.

Note: Companies sent for TGO provisioning cannot be edited until they are approved by TGO.

- A message indicates that mandatory core fields for TGO provisioning are not complete. You must complete these fields in the profile before submitting to TGO provisioning.

Note: When completing and saving your changes to a profile, an Update Confirmation dialog box gives you the option to click **Continue Editing** to make further edits without locking the profile for TGO workflow approval. This is useful if you have multiple changes to make. If you are done with changes, click **Update** to save changes to the profile and lock the profile for TGO approval.

- 5 Go back to step 2 to select your company to send for TGO provisioning.

Viewing Company and Registration Audit Data

Security permissions:

- Company Permissions > View Audit Log

Use this procedure to view audit data for companies. The information identifies the user who made the changes. It also includes the date the change was made and, if modified, the old and new custom field values.

Note: If data masking is enabled for a company custom field, and you do not have permission to view it, asterisks display in place of the value. If a masked custom field is deleted, the original value displays (the field value is not masked).

To view audit data for a company

- 1 Click **Profiles > Companies**, and search for the company you want.
- 2 View the company profile.
- 3 In the profile, click the **Audit Log** tab.

The tab displays audit information for the past 60 days.

The Audit Log tab has two sections:

- **Company Audit Log** - Displays all changes related to the company profile.
- **Registration Audit Log** - Displays all registration requests related to the company profile.

Perform the appropriate action:

To...	Do this:
Save an Excel file that contains all company audit info with 12 months of audit data	<ol style="list-style-type: none"> 1 Click Company Audit Log. 2 Click Export Audit Log. 3 Click Save. 4 If needed, change the name of the file. 5 Navigate to a destination on your hard disk. 6 Click Save.
Open an Excel file that contains all company audit info with 12 months of audit data	<ol style="list-style-type: none"> 1 Click Company Audit Log. 2 Click Export Audit Log. 3 Click Open. <p>The file opens as an Excel spreadsheet.</p>

To...	Do this:
Display a list of registration requests related to the company profile	1 Click Registration Audit Log . The list displays.
View details for a specific registration request	1 Click Registration Audit Log . 2 Click the appropriate Request ID . The details display.
View or save a report that includes details for a specific registration request	1 Click Registration Audit Log . 2 Click PDF for the appropriate request. 3 Save or open the file.

Viewing Contact Audit Data

Security permissions:

- Contact Permissions > View Audit Log

Use this procedure to view audit data for contacts. The information identifies the user who made the changes. It also includes the date the change was made and, if modified, the old and new custom field values.

To view audit data for a contact

- 1** Click **Profiles > Contacts**, and search for the contact you want.
- 2** View the contact profile.
- 3** In the profile, click the **Audit Log** tab.
The tab displays audit information for the past 60 days.
- 4** To view an Excel report that contains audit information for the past 12 months, click **Export Audit Log**.
- 5** Perform the appropriate action:

To...	Do this:
Save the file with 12 months of audit data	1 Click Save . 2 If needed, change the name of the file. 3 Navigate to a destination on your hard disk. 4 Click Save .
Open the file with 12 months of audit data	■ Click Open . The file opens as an Excel spreadsheet.

Subscribing Your Company to AIC

Active Community AIC Provisioning is a process solution designed to help hubs implement application services, such as Active Invoices with Compliance (AIC).

Note: Provisioning is available for TGO integrated communities only and must be enabled for your community. Contact Support for assistance.

See [Chapter 15, "AIC Provisioning"](#) for more information.

Updating File Upload Custom Fields Using .Zip Files

Use this information to update File Upload custom fields for companies. Follow the general requirements in [“Custom Field Requirements for Importing Data” on page 133](#). To update other types of custom fields, see [“Importing Companies and Contacts Using CSV Files” on page 128](#).

Instead of uploading a file to each company profile one at a time, mass file upload lets hub contacts use a compressed (.zip) file to update custom fields saved in the File Upload format. The uploaded files are company-specific, such as scorecards, price lists, or signed contracts. The graphic shows a scorecard, in .xlsx format, that could be uploaded to a company profile.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
Vendor	Vendor ID	Hub ID	Days to Ship Requirement	For Week Starting Date	Total Closed Orders	Orders Closed On Time	Orders Closed Late	Units Shipped	Units Cancelled	Units Ordered	Units Backordered	Closed On Time Rate	Cancel Rate	Backorder Rate	On Time Performance	Cancel Rate Performance	Backorder Rate Performance	Overall Performance Score	Overall Grade
Electra-Craft	8384300070		2	4/28/2013	-	-	-	-	-	-	-	0.0%	0.0%	0.0%	N/A	N/A	N/A	N/A	Not_applicable_this_week
Electra-Craft	8384300070		2	5/5/2013	-	-	-	-	-	-	-	0.0%	0.0%	0.0%	N/A	N/A	N/A	N/A	Not_applicable_this_week

For example, hub contacts might want to create and upload 120 files to a file upload custom field named “Invoice.” The mass file upload process attaches the *appropriate* invoice to the *appropriate* spoke company profile. Spoke contacts can download their files for review and upload them back to their company profiles.

In a larger context, hub contacts upload multiple files to a file upload custom field as described here. They use projects and activities to send activity emails to spoke contacts.

Topics include:

- [“Mass File Upload Requirements” on page 170](#)
- [“Importing File Upload Custom Field Files to Company Profiles” on page 171](#)
- [“Exporting File Upload Custom Field Files from Company Profiles” on page 172](#)

Mass File Upload Requirements

- *Create one file per company.* The file can be in any format.
- Use the company ID as the file name.
- Use this format: company_ID.ext. For example:
 - 12345.xls
 - 335663.pdf
 - 5757575.txt
- Do not use blank spaces or special characters (? ! : |) in file names.
- Put the files you want to upload in one folder for each file upload custom field.
- Send the files to a compressed (zipped) file. The folder is renamed with a .zip file extension.

Topics include:

- [“Importing File Upload Custom Field Files to Company Profiles” on page 171](#)
- [“Exporting File Upload Custom Field Files from Company Profiles” on page 172](#)

Importing File Upload Custom Field Files to Company Profiles

Security permissions: Companies > Import Companies

Use this procedure to import a .zip file that contains multiple files. The files populate file upload custom fields in spoke company profiles.

Important: Before you begin, create a .zip file after reviewing the information in “Mass File Upload Requirements” on page 170.

To import file upload custom field files to spoke company profiles

1 Click **Profiles > Companies > Manage Companies > Upload Files.**

The Upload Files to Company Profiles page opens.

2 In Upload a File, click **Browse** to navigate to the .zip file you created, select the .zip file, and click **Open**.

3 In Community Database, select the file upload custom field to which you want to map the files. Only custom fields saved in the File Upload format are listed.

Important: Because the same names can exist in different custom field groups, be sure to select the correct file upload custom field.

Note: If your custom field permissions do not allow you to view all file upload custom fields, those fields do not display in the list.

- 4 In File Suffix, specify a suffix you want Active Community to append to the customer ID file name. The suffix, such as Scorecard_Report, further identifies the file to the spoke contact, such as 12345-Scorecard_Report.docx.
- 5 Click **Save**.
Active Community sends an email confirmation when all files in the .zip file have been uploaded.
- 6 To verify the data was uploaded:
 - a Open a company profile.
 - b Select the tab for the custom field group that contains the file upload custom field.
 - c Check the file upload custom field to verify the file was uploaded.

Exporting File Upload Custom Field Files from Company Profiles

Security permissions:

- Company Permissions > Export Companies/Reports
- Sub-community Permissions > Import Companies

Use this procedure to export files that spoke users uploaded to their company profiles.

To export file upload custom field files from spoke company profiles

- 1 Click **Profiles > Companies > Actions** menu > **Download Company Files**.
- 2 Select check boxes for the companies whose files you want to export, select **Selected Rows**, and click **OK**.

The Export Files from Company Profiles page opens.

Company Directory » File Download

Export Files from Company Profiles

Select which field the files will be downloaded from..

Community Database *

<p style="display:inline">file upload</p>

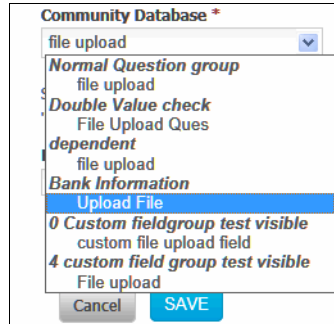
Specify a suffix that will be appended to file names as the files are exported from Active Community. For instance, the file 'company_id.docx' with a file suffix 'monthly' will appear as 'company_id-monthly.docx'.

File Suffix *

Certificates

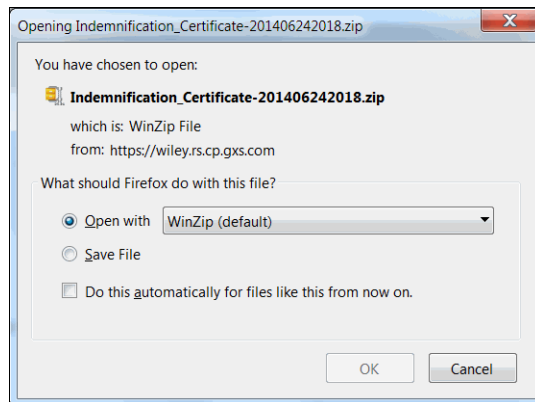
- 3 In Community Database, select the file upload custom fields from which you want to export the files. Only custom fields saved in the File Upload format are listed.

Important: Because the same names can exist in different custom field groups, be sure to select the correct file upload custom field.



Note: If your custom field permissions do not allow you to view all file upload custom fields, those fields do not display in the list.

- 4 In File Suffix, specify a suffix you want Active Community to append to customer ID file name. The suffix, such as *Monthly*, further identifies the file, such as *57575799-Monthly.xls* or *678999-Monthly.pdf*.
- 5 Click **Save**.
Active Community exports the files.
- 6 Respond to the prompts to open or save the .zip file that contains the exported files.



Company and Contact Reports

6

Active Community lets you create and run company reports and company and contact exports as needed, giving you access to real time data. In addition, you can view company summary information in a pop-up window, export customized data to an Excel spreadsheet, and schedule reports to be delivered to you on a regular basis.

Different options are available based on how the reports or exports are set up. For example, company reports are set up using saved searches and saved formats (company custom exports). These are different from exports which are set up using only custom export settings.

In addition to reports, hub administrators can access logs that identify those OpenText administrators who used the impersonation tool to act on behalf of their hub. This information may be necessary if an audit is conducted.

Topics include:

- ["Report/Export Overview" on page 175](#)
- ["Company Reports Based on Saved Searches and Saved Formats" on page 178](#)
- ["Summary Exports" on page 192](#)
- ["Exports" on page 200](#)
- ["Accessing Impersonation Logs" on page 218](#)

Report/Export Overview

You can generate report data based on saved search criteria and on export settings defined for exports. Reports and exports are generated in Microsoft Excel format (.xls), and can be opened or downloaded to your computer for analysis.

In addition, you can create company summary reports that display in a pop-up window in Active Community.

Topics include:

- ["Report/Export Availability to Other Users" on page 176](#)
- ["Report/Export Types" on page 176](#)
- ["How Do I?" on page 177](#)

Report/Export Availability to Other Users

Report and export availability can be defined in three ways, as:

- Private (account owner)—Reports or exports the account owner created and that no one else can edit or run.
- Public (account owner)—Reports or exports the account owner created that others can run but not edit.
- Public (other users)—Reports or exports that other users have created that anyone can run.

Using the Public Check Box

Important: When configuring settings for a report or export, use the **Public?** check box as described here:

- If you want the report or export to be private, do *not* select the **Public?** check box.

Public?

- If you want the report or export to be available to other users, select the **Public?** check box.

Public?

Report/Export Types

There are three main report/export types for companies and contacts.

Company Reports based on Saved Search and Saved Format

Company reports are based on both the criteria in a saved search and the export options that you configure (company custom export). They can provide information about companies in your community and are sent as a link in an email. You can also view a company summary report in a pop-up window.

Summary Exports

Summary exports (for both company and contacts) are Excel files based on data for selected field groups. The exports include data for up to five field groups where each field is displayed as a percentage. Optionally, you can include counts and totals for the fields.

Exports

There are two types of exports:

Both types of exports can contain information about companies or contacts.

- Basic Exports—Let you export basic information about companies and contacts without defining any export settings.
- Custom Exports—Let you define the general criteria and custom fields to include in the export; you can also specify additional export options for the Excel file.

How Do I?

For company reports and company and contact exports, you need to understand the options that are available to you. The table lists a few options to consider.

If you want to...	Choose (or use) the following options:	When you are:
Company Reports (saved search + company custom export)		
Create a company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Create New Report 	<ul style="list-style-type: none"> "Creating a Report" on page 178
Edit a company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Edit 	<ul style="list-style-type: none"> "Editing a Report" on page 180
Run a company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Run 	<ul style="list-style-type: none"> "Running a Report" on page 181
View a summary report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Summary 	<ul style="list-style-type: none"> "Viewing a Summary Report" on page 182
Copy a company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Copy 	<ul style="list-style-type: none"> "Copying a Report" on page 183
Delete a company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Delete 	<ul style="list-style-type: none"> "Deleting a Report" on page 184
Schedule a company report to be emailed to recipients on a regular basis	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Schedule 	<ul style="list-style-type: none"> "Scheduling a Report to be Emailed to Yourself or to Others" on page 185
Stop a regularly scheduled company report	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Schedule > Remove Schedule 	<ul style="list-style-type: none"> "Stopping a Scheduled Report" on page 190
Summary Exports		
Create a summary export		
<ul style="list-style-type: none"> Companies 	<ul style="list-style-type: none"> Profiles > Companies > Reports tab > Action menu > Edit > Create/Edit button 	<ul style="list-style-type: none"> "Configuring Export Settings for a Company Summary Export" on page 192
<ul style="list-style-type: none"> Contacts 	<ul style="list-style-type: none"> Profiles > Contacts > Actions menu > Summary Export > New Export 	<ul style="list-style-type: none"> "Configuring Export Settings for a Contact Summary Export" on page 197
Run a summary export		
<ul style="list-style-type: none"> Companies 	<ul style="list-style-type: none"> Profiles > Companies > Actions menu > Summary Export 	<ul style="list-style-type: none"> "Running a Company Summary Export" on page 194
<ul style="list-style-type: none"> Contacts 	<ul style="list-style-type: none"> Profiles > Contacts > Actions menu > Summary Export 	<ul style="list-style-type: none"> "Running a Contact Summary Export" on page 198
Basic Exports		
Export data to an Excel file with basic formatting		
<ul style="list-style-type: none"> Companies 	<ul style="list-style-type: none"> Profiles > Companies > Actions menu > Basic Export 	<ul style="list-style-type: none"> "Exporting Companies or Contacts to an Excel File" on page 201
<ul style="list-style-type: none"> Contacts 	<ul style="list-style-type: none"> Profiles > Contacts > Actions menu > Basic Export 	
Custom Exports		
Create a custom export		
<ul style="list-style-type: none"> Companies 	<ul style="list-style-type: none"> Profiles > Companies > Actions menu > Custom Export > New Export 	<ul style="list-style-type: none"> "Creating General Settings for a Company Custom Export" on page 204

If you want to...	Choose (or use) the following options:	When you are:
<ul style="list-style-type: none"> ■ Contacts 	<ul style="list-style-type: none"> ■ Profiles > Contacts > Actions menu > Custom Export > New Export 	<ul style="list-style-type: none"> ■ "Creating General Settings for a Contact Custom Export" on page 211
<ul style="list-style-type: none"> ■ Run a custom export 		
<ul style="list-style-type: none"> ■ Companies 	<ul style="list-style-type: none"> ■ Profiles > Companies > Actions menu > Custom Export 	<ul style="list-style-type: none"> ■ "Running a Company Custom Export" on page 207
<ul style="list-style-type: none"> ■ Contacts 	<ul style="list-style-type: none"> ■ Profiles > Contacts > Actions menu > Custom Export 	<ul style="list-style-type: none"> ■ "Running a Contact Custom Export" on page 215

Company Reports Based on Saved Searches and Saved Formats

As an administrator, you can create, configure, and run reports about companies in your community. A company report is based on a saved search and a saved format:

- **Saved search**—A saved search identifies a set of criteria that you have selected, named, and saved so that you can use the same set of criteria again to re-run the report. See ["Creating a Saved Search" on page 103](#).
- **Saved format (company custom export)**—A saved format identifies the custom fields or groups that you want to include in the report. To create a new export format, click **Create/Edit**. See ["Creating General Settings for a Company Custom Export" on page 204](#).

You can customize reports by combining a saved search and a saved format. The report can be run and re-run, thereby accessing the latest data from a saved set of parameters. You can make the report public so that anyone can run it.

After creating reports, you can run the report at any time to see real time data.

Topics include:

- ["Creating a Report" on page 178](#)
- ["Editing a Report" on page 180](#)
- ["Running a Report" on page 181](#)
- ["Viewing a Summary Report" on page 182](#)
- ["Copying a Report" on page 183](#)
- ["Deleting a Report" on page 184](#)
- ["Scheduling a Report" on page 185](#)
- ["Report Example - Scheduling a Report Based on a Saved Search" on page 191](#)

Creating a Report

Permissions required for security role:

- Company Permissions: Export Companies/Reports

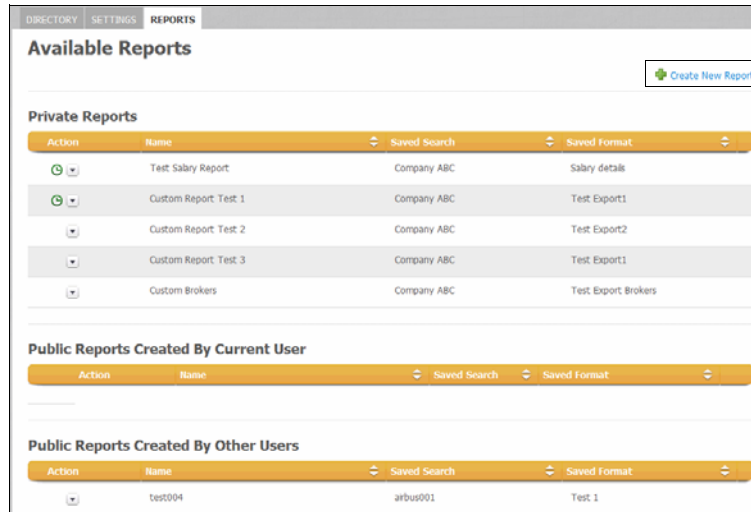
You can run a report to export company data by using the criteria in a saved search. The saved search lets you run and re-run a report, thereby accessing the latest data from a saved set of parameters.

Note: Saved search criteria must exist before you can complete this procedure (see [“Saved Searches” on page 102](#)).

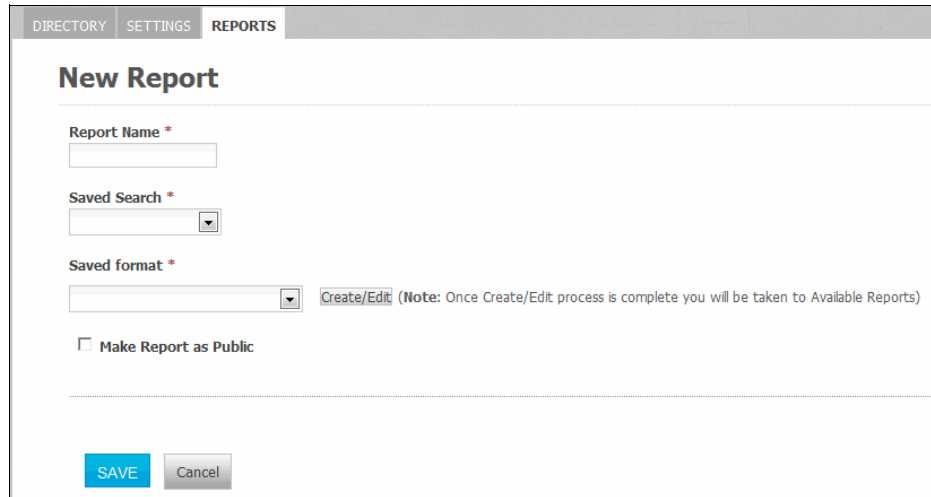
To create a company report from a saved search

- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.



- 2 Click **Create New Report**. The New Report page opens.



- 3 Complete the fields as follows:

- Report Name—Type a name for the report.
- Saved Search—Select a saved search from the drop-down list. The search identifies a set of criteria that you have selected, named, and saved so that you can use the same set of criteria again to re-run the report. See [“Saved Searches” on page 102](#).
- Saved format (company custom export)—Identifies the custom fields or groups that you want to include in the report. Do one of the following:

- To use an existing format, select a format from the drop-down list.
- To create a new export format, click **Create/Edit**. The Company Custom Exports page opens. See ["Creating General Settings for a Company Custom Export" on page 204](#).
- To edit an existing format, click **Create/Edit**. The Company Custom Exports page opens. See ["Editing a Company Custom Export" on page 208](#).
- **Make Report Public**—Select the check box if you want the report to display on the Available Reports page as a public report that anyone can run.

4 Click Save.

The newly created report is listed on the Available Reports page.

Editing a Report

Permissions required for security role:

- Company Permissions: Export Companies/Reports

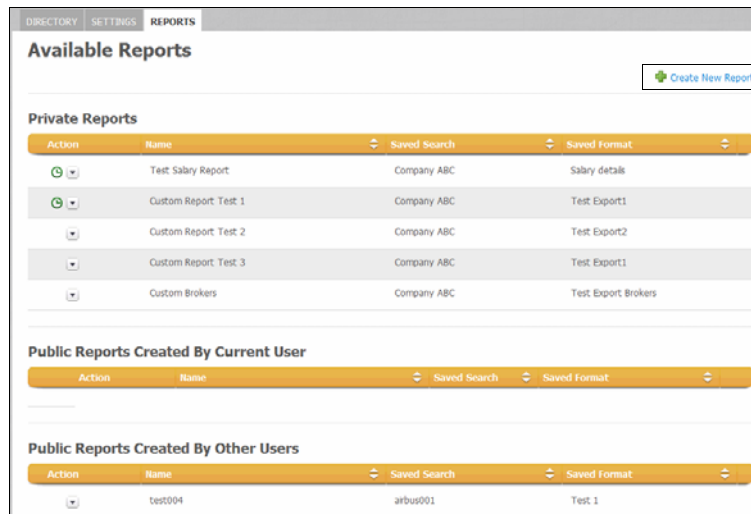
A report is comprised of a saved search and a saved format (company custom export). The saved search lets you run and re-run a report, thereby accessing the latest data from a saved set of parameters. The saved format lets you identify and save the custom fields or groups that you want to include in the report.

Note: Saved search criteria must exist before you can complete this procedure (see ["Saved Searches" on page 102](#)).

To edit a company report

- 1** Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.



- 2** Click the name of the report you want to edit.

Note: You cannot edit a report created by other users.

- 3** Modify the report as described in ["Creating a Report" on page 178](#).

- 4** Click **Save** to save your changes.

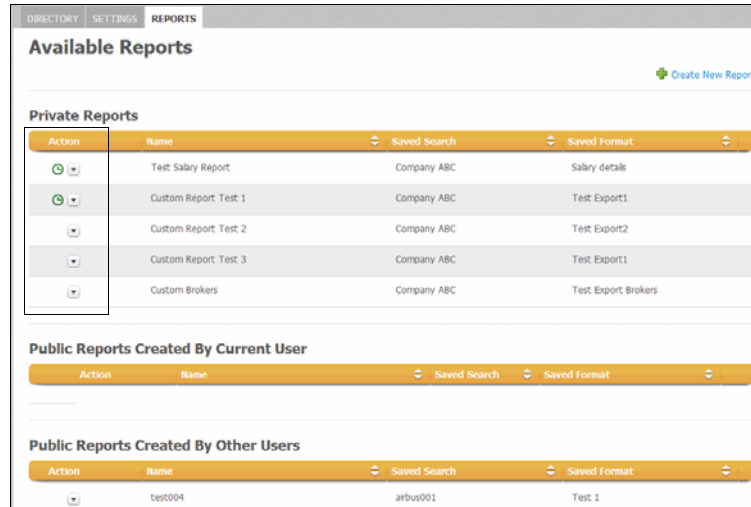
Running a Report

You can run a company report that has been created from a set of saved search criteria. Every time you run the report, the real time results are based on the latest data that matches the saved set of criteria (see “[Saved Searches](#)” on page 102 and “[Creating a Report](#)” on page 178).

To run a saved search report

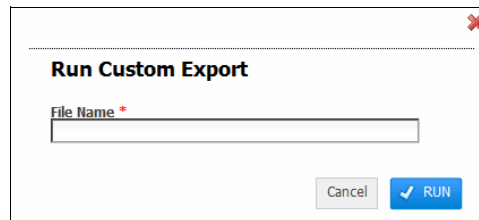
- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.



- 2 From the Action drop-down list for the report you want to run, select **Run**.

The Run Custom Export page opens.



- 3 Specify a name for the report in the dialog box.

- 4 Click **Run**.

The report is generated, and the data is displayed in an MS Excel spreadsheet file (.xls).

Note: Large exports (processing times of more than 30-40 seconds) run in the background, and the generated export file is sent to you as a download link in an email. The link is available for seven days. Smaller exports are downloaded instantly.

Viewing a Summary Report

You can view a summary of a company report in a pop-up window.

Important: To be able to view a summary report in a pop-up window, be sure to select the Add Summary Export check box as described in ["Configuring Export Settings for a Company Summary Export"](#) on page 192.

To view a company summary report in a pop-up window

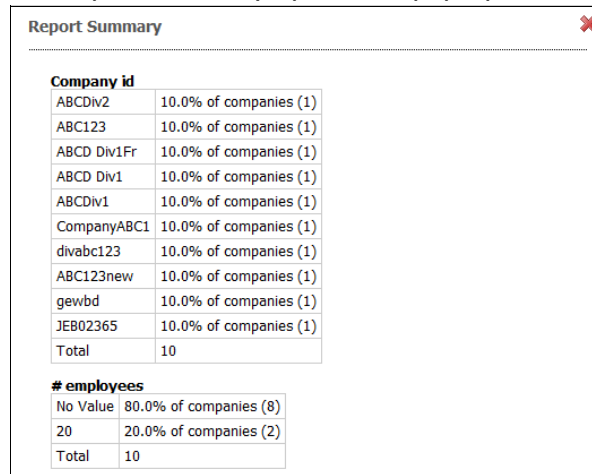
- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens. A summary report is available for reports where Summary displays in the Action drop-down list.



- 2 From the Action drop-down list for the report you want to view, select **Summary**.

The Report Summary opens in a pop-up.



- 3 Do one of the following:
 - To close the Report Summary, click the **X**.
 - To print the Report Summary, right-click in the pop-up and select **Print**.

Copying a Report

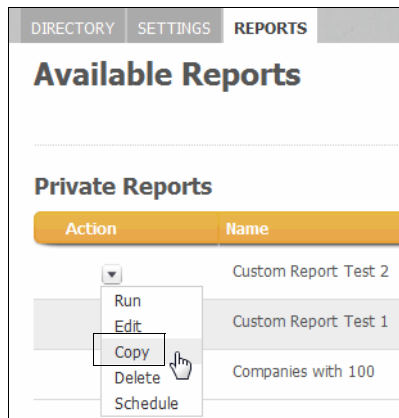
You can copy a company report that you or someone else has created and modify it to fit your needs.

To copy a report

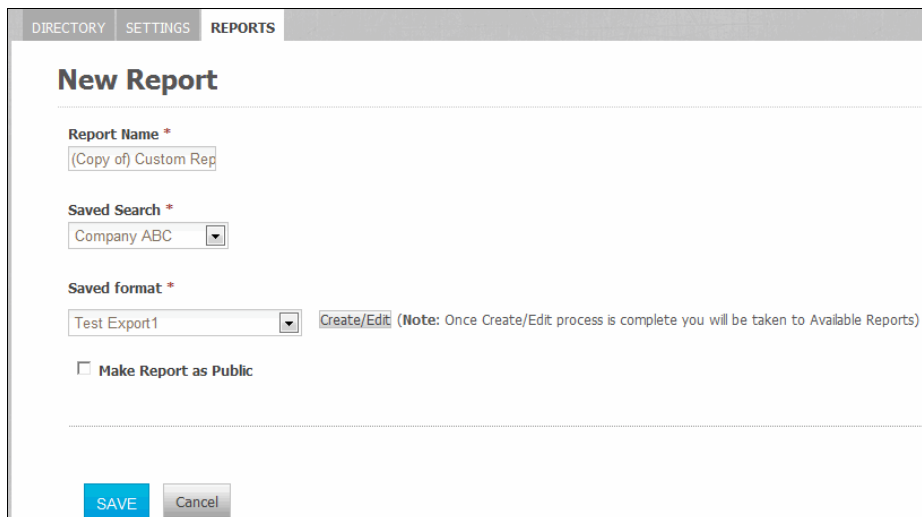
- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.

- 2 From the Action drop-down list for the report you want to copy, select **Copy**.



The New Report page opens. The parameters of the copied report display in the fields.



- 3 Edit the fields as follows:

- Report Name—Type a name for the report to replace (Copy of) *the selected report*.
- Saved Search—Select the name of a saved search from the drop-down list. The search identifies a set of criteria that you have selected, named, and saved so that you can use the same set of criteria again to re-run the report.
- Saved format (company custom export)—Identifies the custom fields or groups that you want to include in the report. Do one of the following:

- To use an existing format, select a format from the drop-down list.
- To create a new export format, click **Create/Edit**. The Company Custom Exports page opens. See ["Creating General Settings for a Company Custom Export" on page 204.](#)
- To edit an existing format, click **Create/Edit**. The Company Custom Exports page opens. See ["Editing a Company Custom Export" on page 208.](#)
- **Make Report Public**—Select the check box if you want the report to display on the Available Reports page as a public report that anyone can run.

4 Click Save.

The copied report is now a new report saved with the name you entered.

Deleting a Report

You can only delete a company report that you created.

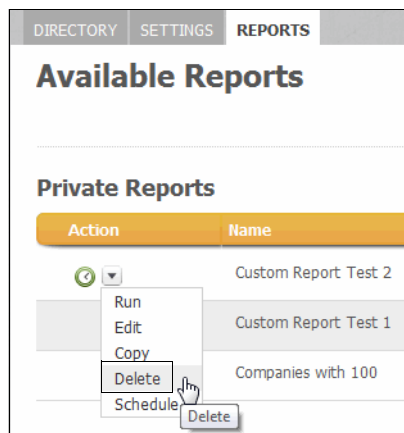
Note: You cannot delete public reports created by other users. Only the Community Administrator can delete reports created by other users.

To delete a report

- 1** Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.

- 2** In the Action drop-down list for the report you want to delete, select **Delete**.



A confirmation dialog opens and asks if you want to delete the report.

- 3** Click **Delete**.

The report is deleted.

Scheduling a Report

You can schedule a company report to be emailed to yourself or other hub users on a regular basis. The report, which is an Excel file (.xls), is sent using email. The email includes a link so you can download the file. The link is available for seven days.

Note: All the data visible in the report is available to every recipient who receives the report in the email.

Important: If you have “View Masked Fields” permission and you schedule a report, the recipients of the report can see the masked data in the report, even if they do not have “View Masked Fields” permission.

After scheduling a report, clock icons display by the report names on the Available Reports page.



- One clock icon displays beside reports that are scheduled and active. That is, the start date has already occurred and reports are being emailed to you.
- A different clock icon displays besides reports that have not yet become active or are no longer active; for example:
 - A report that is scheduled for the future (start date has not yet occurred)
 - A report that was scheduled in the past (end date has already occurred)

Topics include:

- [“Scheduling a Report to be Emailed to Yourself or to Others” on page 185](#)
- [“Stopping a Scheduled Report” on page 190](#)

Scheduling a Report to be Emailed to Yourself or to Others

Security permissions: Public Report Permissions > Create Public Exports/Reports

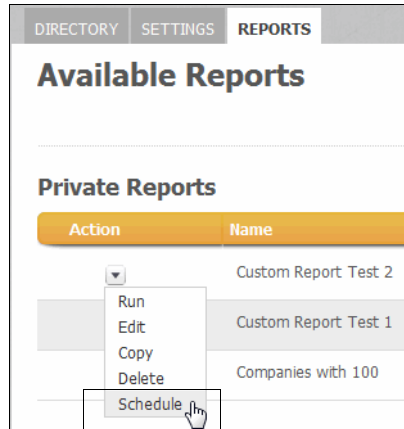
You can schedule a company report to be emailed to yourself or to other hub users on a regular basis. The report, which is an Excel file (.xls), is sent using email. The email includes a link so you can download the file. The link is available for seven days.

Use this procedure to define the report recipients, report frequency, and the settings for the report schedule.

To schedule a report

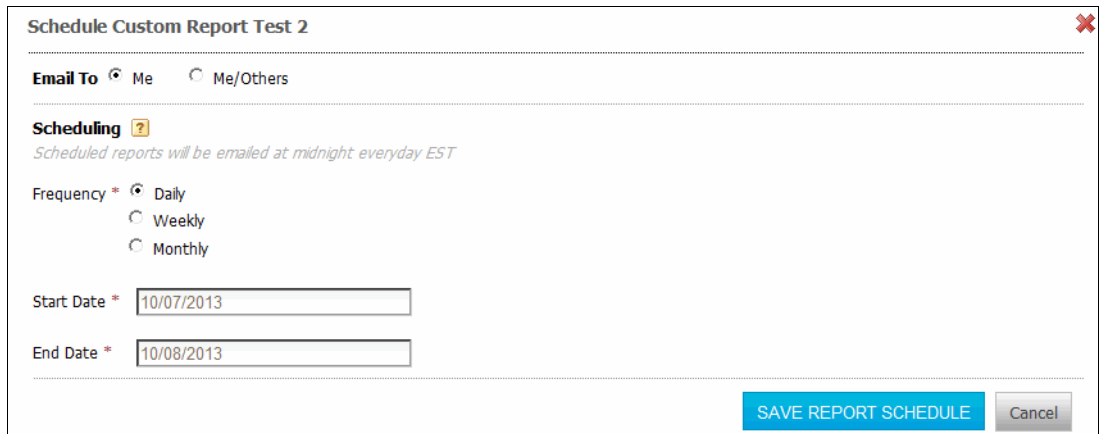
- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.



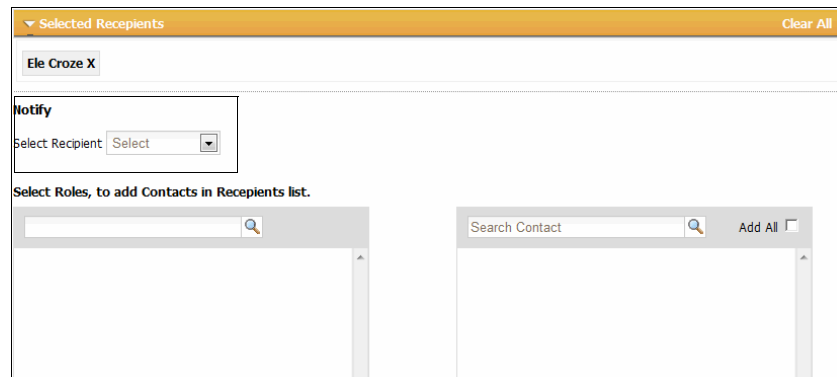
- 2 From the Action drop-down list for the report you want to schedule, select **Schedule**.

The Schedule page opens for that report.

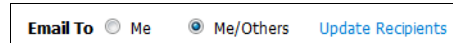


- 3 Under Email To, select the option that indicates where to email the report:
 - Me—Email the report to yourself. If selected, go to step 6.
 - Me/Others—Email the report to yourself as well as other hub users.

When you schedule this report the first time, selecting Me/Others displays the Notify section so you can select recipients of the email. If selected, go to step 4.



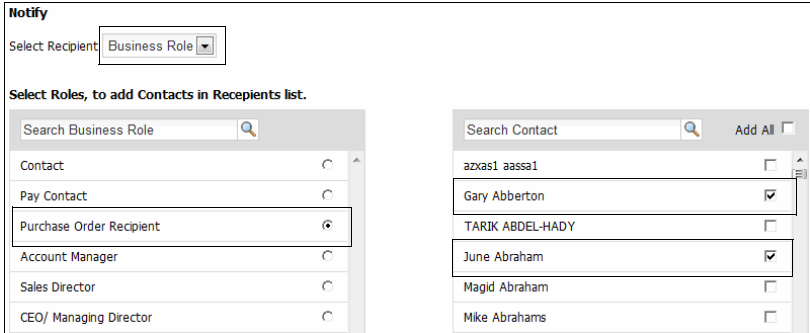
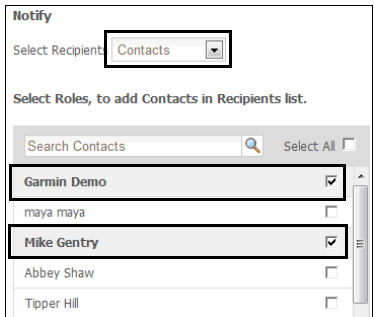
When you want to change any of the recipients for a report that is already scheduled, click the **Update Recipients** link to display the Notify section. This link displays only after a report has been scheduled. Go to step 4.



- 4 Under the Notify section, from the Select Recipient drop-down list, select one of the following recipient types:
- Business Role—Business Roles that are defined for the community.
 - Contacts—Contacts in the community.
 - Security Role—Security Roles that are defined for the community.
 - Tags—Tags that are defined in the community.

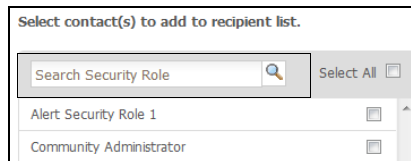
The list Select Roles to add Contacts in Recipients list populates with information based on your selection.

5 Perform the appropriate action:

If you selected...	Do this:
<ul style="list-style-type: none"> ■ Business Role ■ Security Role ■ Tags 	<p>1 Select a role or tag from the list by selecting the radio button for the role or tag.</p>  <p>A list displays the contacts associated with that role or tag.</p> <p>2 From the list, select the contacts you want to be recipients of the email by selecting the check box for the contact.</p> <p>The recipients are added to the Selected Recipients section.</p> <p>3 Repeat Steps 1 and 2 as necessary to select additional roles and contacts.</p> <p>4 Go to step 6.</p>
<ul style="list-style-type: none"> ■ Contacts 	<p>1 Select the contacts that you want to be recipients of the email by selecting the check box for the contact.</p>  <p>The recipients are added to the Selected Recipients section.</p> <p>2 Go to step 6.</p>

Note: When defining report recipients, you can also:

- Use the Search box to search for a business or security role, contact, or tag. Select that role, contact, or tag from the list.



- For Contacts, use the **Select All** check box to select all of the contacts. Clear the check boxes of any contacts that you do not want to include.

- Under Frequency, select one of the following options for emailing the report. The report will be emailed at midnight Eastern Standard Time (EST) based on the frequency you select.

- Daily—The report is emailed every day.
- Weekly—The report is emailed weekly. When you select Weekly, a drop-down list displays. Select the day of the week you want the report sent.

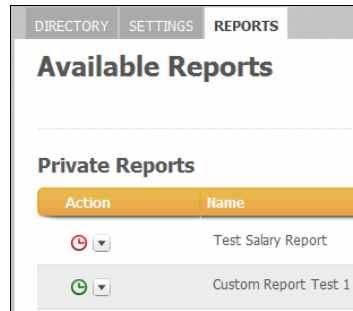
- Monthly—The report is emailed monthly. When you select Monthly, two drop-down lists display. To create the combination for sending the report, select the week of the month (first, second, third, fourth, last) and the day of the month from the lists.

For example, select **Second** and **Tuesday** to send the report on the second Tuesday of every month.

- To specify the start and end dates for the report, click in the respective Start Date and End Date boxes to display the calendar. Select the appropriate date from the calendar.

- Click **Save Report Schedule**.

The report is scheduled and you return to the Available Reports page.



Note the clock icons.

- A clock icon displays beside reports that are scheduled and active (start date has already occurred and reports are being emailed).
- A different clock icon displays besides reports that have not yet become active or are no longer active:
 - A report that is scheduled for the future (start date has not yet occurred)
 - A report that was scheduled in the past (end date has already occurred).

Stopping a Scheduled Report

Security permissions: Public Report Permissions > Create Public Exports/Reports

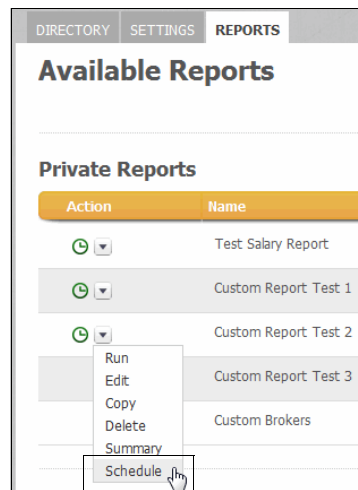
You can remove the schedule settings for a company report so it is no longer emailed on a regular basis (see [“Scheduling a Report to be Emailed to Yourself or to Others”](#) on page 185).

To remove the schedule for a regular report

- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.

- 2 From the Action drop-down list for the report whose schedule you want to remove, select **Schedule**.



The Schedule page opens for that report.

3 Click Remove Schedule.

The schedule for that report is removed, and you return to the Available Reports page. The clock icon (indicating the status of a scheduled report) no longer displays for the report.

Report Example - Scheduling a Report Based on a Saved Search

A customer tracks certificate expiration dates for their spokes using a date custom field. A hub user wants to create a report (using a saved search and export) that is emailed daily to selected recipients listing all of the spokes whose certificates are due 30 days from today.

The expected result for setting up this report is that the hub receives a dynamic 30 day total which changes daily based on which spokes meet the saved search condition (for example, certificates expire 30 days from that day).

1 The hub creates a saved search. See ["Creating a Saved Search" on page 103](#) for more details.

2 The hub creates the report. See ["Creating a Report" on page 178](#) for more details.

3 The hub schedules the report to be emailed to selected recipients on a daily basis. See ["Scheduling a Report" on page 185](#) for more details.

Summary Exports

A summary export (both company and contacts) summarizes data for selected custom field groups.

When configuring export settings for the export, you can choose up to five field groups to display. In the summary, each field is displayed as a percentage. Optionally, you can choose to include the count and total for the fields.

Topics include:

- ["Company Summary Exports" on page 192](#)
- ["Contact Summary Exports" on page 196](#)

Company Summary Exports

You must define the settings for a company summary export before you can run it.

Topics include:

- ["Configuring Export Settings for a Company Summary Export" on page 192](#)
- ["Running a Company Summary Export" on page 194](#)
- ["Deleting a Company Summary Export" on page 196](#)

Configuring Export Settings for a Company Summary Export

Summary exports allow you to view a summary of an export in an Excel file.

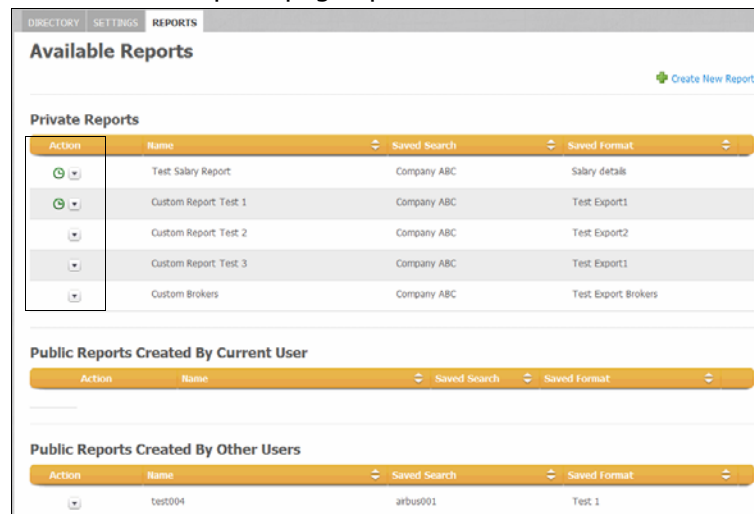
When configuring export settings for the report, you can choose up to five field groups to display. In the summary, each field is displayed as a percentage. Optionally, you can choose to include the count and total for the fields.

Important: To be able to view a company summary report in a pop-up window (see ["Viewing a Summary Report" on page 182](#)) or a company summary export in an Excel file (see ["Running a Company Summary Export" on page 194](#)), be sure to select the Add Summary Export check box as described in this procedure.

To configure settings for a company summary report

- 1 Click **Profiles > Companies > Reports** tab.

The Available Reports page opens.



- From the Action drop-down list for the report you want to configure settings, select **Edit**.

The Edit Report page opens.

- Click **Create/Edit**.

The Company Custom Exports list page opens.

- Perform the appropriate action:

If you want to...	Do this:
Edit the export settings of an existing export	<ul style="list-style-type: none"> Click the export link.
Define new export parameters	<ul style="list-style-type: none"> Click New Export to define the parameters for a new export.

The Company Custom Export page opens.

- Click the **Configure Export** link.

The Configure Export page opens. The Summarize Fields section, which is at the bottom of the page, is shown.

The screenshot shows a configuration window titled "Summarize Fields". It contains the following elements:

- A checked checkbox labeled "Add Summary Export".
- Two checkboxes: "Show Count" (checked) and "Show Total" (unchecked).
- A section labeled "Group By Field" with a dropdown menu showing "Company Name" and a "+" icon to the right.
- A section labeled "Summarize On" with a dropdown menu showing "# Employees" and a "Type" dropdown menu showing "Average", with a "+" icon to the right.
- At the bottom, there are two buttons: "SAVE" (in blue) and "Cancel" (in grey).

Note: In the Export Options section, select the options that specify how you want the exported file to look.

6 In the Summarize Fields section, select the **Add Summary Export** check box.

Important: To be able to view a company summary report in a pop-up window (see ["Viewing a Summary Report" on page 182](#)) or a company summary export in an Excel file (see ["Running a Company Summary Export" on page 194](#)), the **Add Summary Export** check box must be selected.

- a** Optionally, choose the **Show Count** and **Show Total** check boxes if you want to include the count and/or total for the fields in the export.
- b** Under the **Group by Field** drop-down list, select the fields by which you want to group the information. You can click the + icon to add up to 5 groups.
- c** Under the **Summarize On** drop-down list, select the fields you want to summarize, and select the Type of information you want to see. Click the + icon to add more fields.

7 Click **Save**.

The configuration is saved.

8 Go to ["Running a Company Summary Export" on page 194](#).

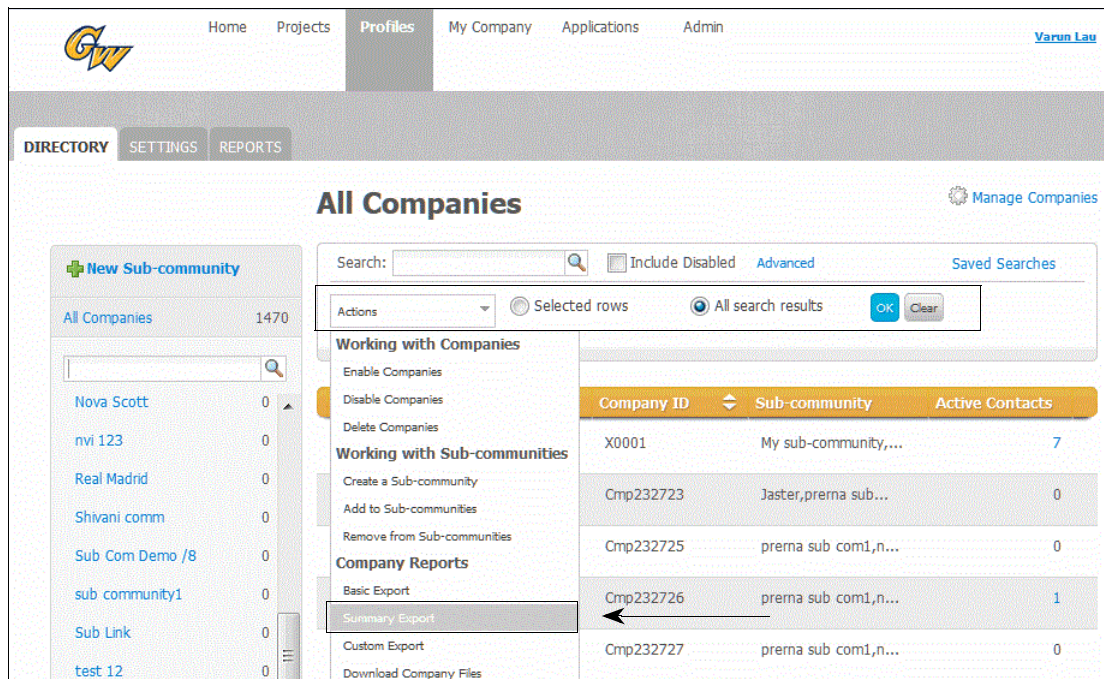
Running a Company Summary Export

Important: To be able to run a company summary export, be sure to select the Add Summary Export check box as described in ["Configuring Export Settings for a Company Summary Export" on page 192](#).

To run a company summary export

1 Click **Profiles > Companies**.

The All Companies list page opens.



2 From the Actions drop-down list, select **Summary Export**.

3 Select the companies whose data you want to include in the export.

- Select **All Search Results**, then click **OK**.
- To include specific companies, select the check boxes for the companies you want to include in the export, select **Selected Rows**, and click **OK**.

The Company Summary Exports list page opens. It lists saved exports you created (Private Exports and Public Export Created By Current User) and exports created by others (Public Exports Created by Other Users).



4 Click the name of the Contact Summary Export you want to run. For example, click **summary by state**.

The page that opens shows the saved export settings.

5 Click **Run**.

The Run Summary Export dialog box opens.

6 Change the filename, if needed, and then click **Run**.

Note: Default file name: *Company_Summary_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

7 A message indicates that the file will be emailed to you.

Deleting a Company Summary Export

Users who create a summary export, as well as Community Administrators, can delete a summary export.

To delete a company summary export

1 Click **Profiles > Companies**.

The All Companies list page opens.

2 From the Actions drop-down list, select **Summary Export**.

3 Click **OK**.

The Company Summary Exports list page opens. It lists saved exports you created (Private Exports and Public Export Created By Current User) and exports created by others (Public Exports Created by Other Users).



4 Click **Delete** for the summary export you want to delete.

A message asks you to confirm your selection.

5 Click **OK**.

The summary export is deleted.

Contact Summary Exports

You must define the settings for a contact summary export before you can run it.

Topics include:

- ["Configuring Export Settings for a Contact Summary Export" on page 197](#)

- “Running a Contact Summary Export” on page 198
- “Deleting a Contact Summary Export” on page 199

Configuring Export Settings for a Contact Summary Export

Summary exports allow you to view a summary of an export in an Excel file.

When configuring export settings for the export, you can choose up to five field groups to display. In the summary, each field is displayed as a percentage. Optionally, you can choose to include the count and total for the fields.

Important: To be able to view a contact summary export in an Excel file (see “Running a Contact Summary Export” on page 198), be sure to select the Add Summary Export check box as described in this procedure.

To configure settings for a contact summary export

1 Click **Profiles > Contacts**.

The Contacts list page opens.

2 From the Actions drop-down list, select **Summary Export**.

3 Select the contacts whose data you want to include in the export.

- Select **All Search Results**, then click **OK**.
- To include specific contacts, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Contact Summary Exports list page opens.

EXPORT CONTACTS	
Contacts >>	
Contact Summary Exports New Export	
Private Exports	
Name	Action
private test	Delete
Total Private Exports: 10	
Public Exports Created By Current User	
Name	Action
test	Delete
test11	Delete
Total Private Exports: 10	
Public Exports Created By Other Users	
Name	Action
Report Test 2014	Delete
Total Private Exports: 10	

It lists saved exports you created (Private Exports and Public Exports Created By Current User) and exports created by others (Public Exports Created by Other Users).

4 Click **New Export**.

The Contact Summary Export page opens.

- 5 In **Name**, type a name for the summary export.
- 6 In **Public?**, if you want the export to be:
 - Private, do not select the Public? check box.
 - Available to other users, select the Public? check box.
- 7 To select the fields by which you want to group the data, make selections from the **Group by Field** drop-down list. You can click the + icon to add up to 5 groups.
- 8 To select how you want the contact information to be summarized, make a selection from the **Summarize On** drop-down list. If you select:
 - Do Not Summarize—The contact summary information is not summarized.
 - Custom Fields—Add additional parameters to the export. Use the Type drop-down list and + icon to indicate additional parameters.
- 9 Click **Save**.
The configuration is saved.
- 10 Go to [“Running a Contact Summary Export” on page 198](#).

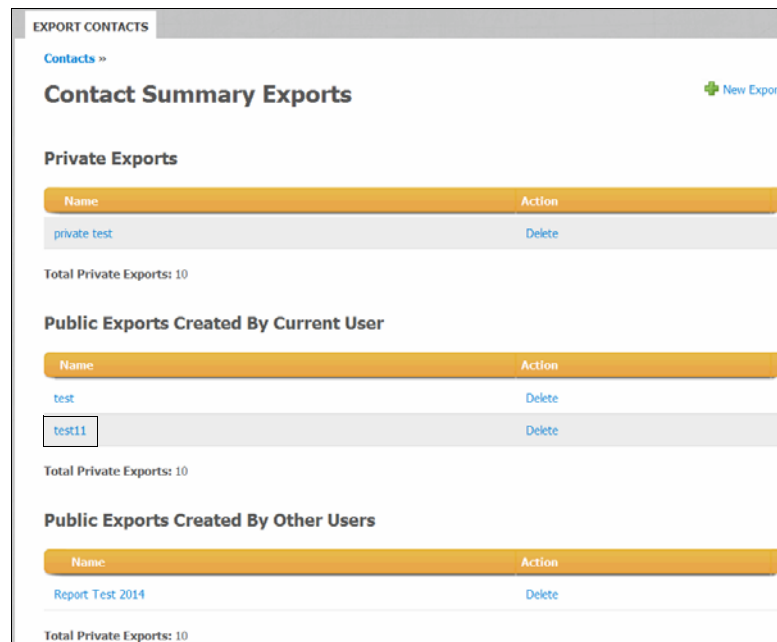
Running a Contact Summary Export

To run a contact summary export

- 1 Click **Profiles > Contacts**.
The Contacts list page opens.
- 2 From the Actions drop-down list, select **Summary Export**.
- 3 Select the contacts whose data you want to include in the export.
 - Select **All Search Results**, then click **OK**.

- To include specific contacts, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Contact Summary Exports list page opens.



- 4 Click the name of the Contact Summary Export you want to run. For example, click **test11**.

The page that opens shows the saved export settings.

- 5 Click **Run**.

The Run Summary Export dialog box opens.

- 6 Change the filename, if needed, and then click **Run**.

Note: Default file name: *Contact_Summary_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

- 7 Open or save the file to your computer.

Deleting a Contact Summary Export

Users who create a summary export, as well as Community Administrators, can delete a summary export.

To delete a contact summary export

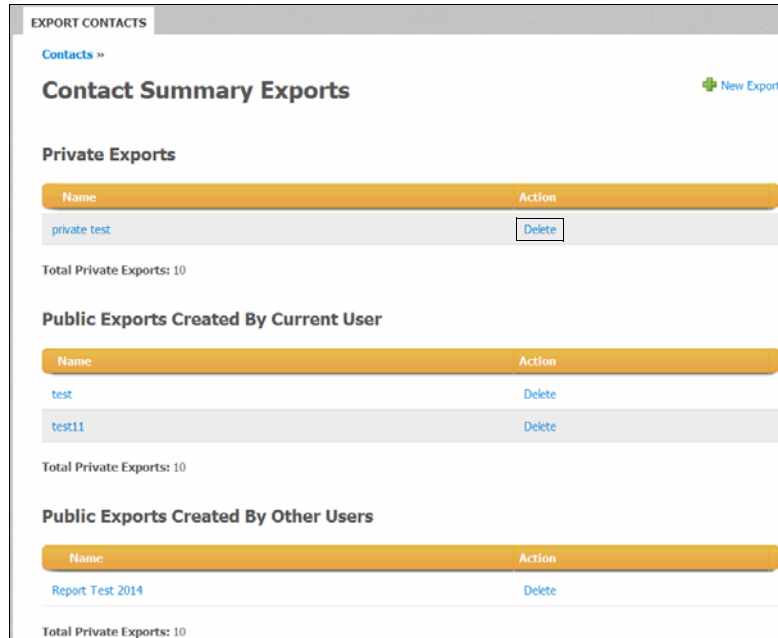
- 1 Click **Profiles > Contacts**.

The Contacts list page opens.

- 2 From the Actions drop-down list, select **Summary Export**.

- 3 Click **OK**.

The Contact Summary Exports list page opens.



- 4 Click **Delete** for the export you want to delete.
A message asks you to confirm your selection.
- 5 Click **Delete**.
The summary export is deleted.

Exports

There are two types of exports: basic and custom. The data is viewed in an Excel file. Both types of exports can contain information about companies or contacts.

- Basic Exports—Let you export basic information about companies and contacts without defining any export settings. In the exported file:
 - The first row contains column headings that correspond to the fields that were exported; for example, Last Name, First Name, Company, Title.
 - The second and subsequent rows list data values; for example, Brown, Sally, Acme, Sales Rep.
- Custom Exports—Let you define the general criteria and custom fields to include in the export; you can also specify additional export options for the Excel file.

Topics include:

- ["Basic Exports" on page 201](#)
- ["Company Custom Exports" on page 204](#)
- ["Contact Custom Exports" on page 211](#)

Basic Exports

Basic Exports let you export basic information about companies and contacts to an Excel file without having to define any export settings.

In the exported file:

- The first row contains column headings that correspond to the fields that were exported; for example, Last Name, First Name, Communication Email.
- The second and subsequent rows list data values; for example, Jones, Bob bob.jones@example.com.

	A	B	C	
1	Last Name	First Name	Communication Email	1
2	Jones	Bob	bob.jones@example.com	2
3	Smit	John	john.smit@example.com	
4	Dexter	Lea	lea.dexter@example.com	
5	Potter	Silas	silas.potter@example.com	

The parts of a file:

Key Description

- | | |
|---|-----------------|
| 1 | Column headings |
| 2 | Data values |

Important: All company and contact profile fields can be exported, including custom fields, even if there are no values in them. If the company or contact is tagged with a keyword, however, the tag name (keyword) will not be exported. In addition, you will not see custom fields in groups to which you do not have View Question Group permission.

Exporting Companies or Contacts to an Excel File

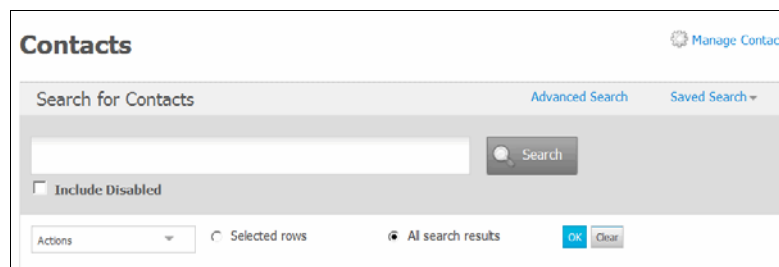
Use this procedure to perform a basic export for companies or contacts.

Note: The Security Role column will only be exported to Community Administrators.

To export companies or contacts to an Excel file

- 1 Click **Profiles > Companies** or **Contacts**.

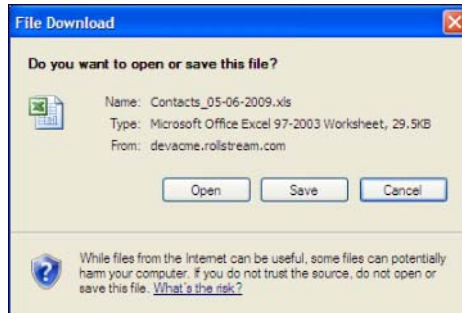
The Companies or Contacts list page opens.



- 2 Use search options to display the list of results you want to export. For details, see "Quick (Simple) Searches" on page 91 or "Advanced Searches" on page 93.
- 3 From the Actions drop-down list, select **Basic Export**.
- 4 Select the companies or contacts whose data you want to include in the export.
 - Select **All Search Results**, then click **OK**.

- To include specific companies or contacts, select the check boxes for the companies or contacts you want to include in the export, select **Selected Rows**, and click **OK**.

A dialog box opens.



- 5 Click **Save** to customize the name of the file and select a destination on your hard disk.
- 6 Click **Open** to open the file as an Excel spreadsheet.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Title	Salutation	Work Phone	Disabled At
2	Judy	Abels	judy@acme.com	Ms			
3	David	Black	dblack@acmeinc.com	Marketing	Mr.	(555) 555-1260	
4	Michael	Durham	mdurham@circuittown.com	President	Mr.		2009-03-25 22:56
5	Terry	Goldberg	tgoldberg@ngwp.com	Accounts Paya	Mrs.	(777) 777-0000	2009-03-25 22:56
6	Jim	Hancock	jhancock@circuittown.com	Primary Point	Mr.	(703) 222-3333	
7	Cindy	Landers	clanders@acmeinc.com	Legal	Ms	(555) 555-1233	

When the file opens, you will see all profile fields, including custom fields (regardless of whether they have values in them).

Note: You will not see custom fields in groups to which you do not have View Question Group permission.

If the custom values are stored in data tables, you will be able to see the values in separate *tabs*, one per table (question group). Regular custom fields are in the main spreadsheet tab. For example, if you had a data table called Specialty and a regular custom field group called Role, the exported data might look like this:

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	Email	Title	Is Broker	Disabled At	Company Name	Company ID	Role
2	Akhil	Agrawal	akhil@example.org		false		American Sciences	0280	8a
3	Paul	Agular	paul1@example.org	ACCOUNT REP	false	2009-03-25 22:56	AM Sales Team	amsa	
4	Nisar	Ahmed	nisar@example.org		false		AMD Industries	4029	Women Owned
5	Gina	Albert	gina1@example.org		false		Griffin	2904	
6	Angela	Albertemst	angela1@example.org	Credit Analyst	false		Remax Industries	2315	8a
7	John	Arnold	john20@example.org		false		Griffin	0034	
8	Jill	Arshan	jill1@example.org		false		Life Sciences Corp	FM0102	

	A	B	C	D	E	F
1	First Name	Last Name	Email	Specialty - Specialty	Specialty - Years Experience	Table Row
2	Angela	Albertemst	angela1@example.org	Management	10	1
3	Angela	Albertemst	angela1@example.org	Engineering	2	2
4	Jill	Arshan	jill1@example.org	Finance	5	1
5	Jill	Arshan	jill1@example.org	Administration	2	2

The parts of the file:

Key	Description
1	Regular custom fields
2	Data table values

Company Custom Exports

Company custom exports let you define the general criteria and custom fields to include in the export; you can also specify additional export options for the Excel file.

Topics include:

- "Creating General Settings for a Company Custom Export" on page 204
- "Configuring the Format for a Company Custom Export" on page 206
- "Running a Company Custom Export" on page 207
- "Editing a Company Custom Export" on page 208
- "Deleting a Company Custom Export" on page 210

Creating General Settings for a Company Custom Export

Use this procedure to define the data you want to include in an Excel (.xls) file when exporting company information.

Note: To define how the data will look in the Excel file, go to "Configuring the Format for a Company Custom Export" on page 206 after completing this procedure.

To create the general settings for a company custom export

- 1 Click **Profiles > Companies**.

The All Companies list page opens.

The screenshot shows the 'All Companies' page in the OpenText Active Community CE 21.2 user interface. The page has a navigation bar at the top with 'Home', 'Projects', 'Profiles', 'My Company', 'Applications', and 'Admin'. The 'Profiles' tab is selected. Below the navigation bar, there are tabs for 'DIRECTORY', 'SETTINGS', and 'REPORTS'. The main content area is titled 'All Companies' and includes a search bar, a table of companies, and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options like 'Enable Companies', 'Disable Companies', 'Delete Companies', 'Working with Sub-communities', and 'Company Reports'. The 'Custom Export' option is highlighted. The table of companies has columns for 'Company ID', 'Sub-community', and 'Active Contacts'.

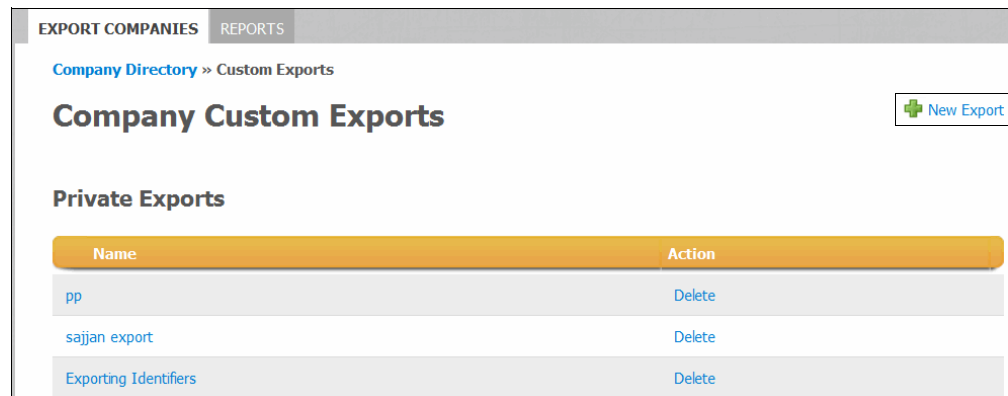
Company ID	Sub-community	Active Contacts
X0001	My sub-community,...	7
Cmp232723	Jaster,prema sub...	0
Cmp232725	prema sub com1,n...	0
Cmp232726	prema sub com1,n...	1
Cmp232727	prema sub com1,n...	0

- 2 From the Actions drop-down list, select **Custom Export**.

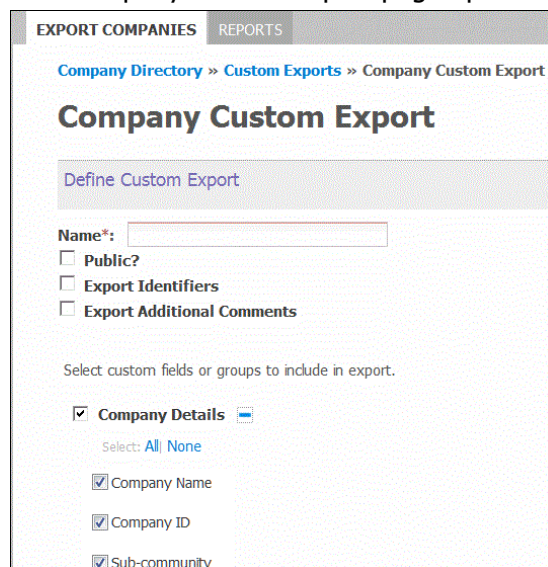
- 3 Select the companies whose data you want to include in the export.

- To include all companies, select **All Search Results**, then click **OK**.
- To include specific companies, select the check boxes for the companies you want to include in the export, select **Selected Rows**, and click **OK**.

The Company Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Other Users).



- To define the general settings for a new custom export, click **New Export**. The Company Custom Export page opens.



- In **Name**, type the name of the custom export.
- In **Public?**, if you want the export to be:
 - Private, do not select the **Public?** check box.
 - Available to other users, select the **Public?** check box.
- Select the **Export Identifiers** check box if you want to export the identifiers, in addition to the labels, for the custom fields. For example:

Multiple Choice (Label)	Multiple Choice
Hammer	H0023

Note: Exporting the identifiers provides the information that is needed to import the file back into Active Community. Applies only to Multiple Choice, Drop List, and Radio Button List custom fields. Only available to users with appropriate permissions.

- 8 Select the **Export Additional Comments** check box if you want to export the “Additional Comments” associated with the custom field values. The export of additional comments for a custom field is only available if the “Add Comment Field” has been enabled for that field.
- 9 In the **Select custom fields for groups to include in export** check boxes, select the custom fields or groups for which you want to include data in the export. As you select a check box, additional fields display so you can include or exclude them from the custom export.
Note: The exported file maintains the labels and choices in the language selected.
- 10 Click **Save**.
The Company Custom Exports page refreshes and lists the new export.
- 11 Go to [“Configuring the Format for a Company Custom Export.”](#)

Configuring the Format for a Company Custom Export

Use this procedure to define the settings that control how exported company data will look in the Excel file.

To configure the format for a company custom export

- 1 After [“Creating General Settings for a Company Custom Export”](#) on page 204, on the Company Custom Exports page, select the link for the custom export.
- 2 To define Excel format settings for the export, click **Configure Export**.
The Configure Export page opens. The top part of the page is shown.

- 3 Under Export Options, do the following:
 - a Select one of the radio buttons to indicate how you want to export multiple choice fields (Individual Columns or Comma separated values in 1 cell).
 - b To export custom field groups as separate worksheets, select that check box.
- 4 Under Summarize Fields, to be able to view a summary report in a pop-up window (see [“Viewing a Summary Report”](#) on page 182) or a summary export in an Excel file (see [“Running a Company Summary Export”](#) on page 194), select the **Add Summary Export** check box.

- 5 Click **Save**.

The custom export configuration is saved.



- 6 To return to the Company Custom Exports page, click the **Custom Exports** breadcrumb.
- 7 Perform the appropriate action:
 - a To save the export, click **Save**. You have completed the procedure. The export settings are saved.
 - b To run the export, click **Run**.
 - c When the Run Custom Export page opens, click **Run**.

Note: Default file name: *Company_Custom_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.
 - d Open or save the file to your computer.

Running a Company Custom Export

You can run a custom export you created previously (see “[Creating General Settings for a Company Custom Export](#)” on page 204 and “[Configuring the Format for a Company Custom Export](#)” on page 206).

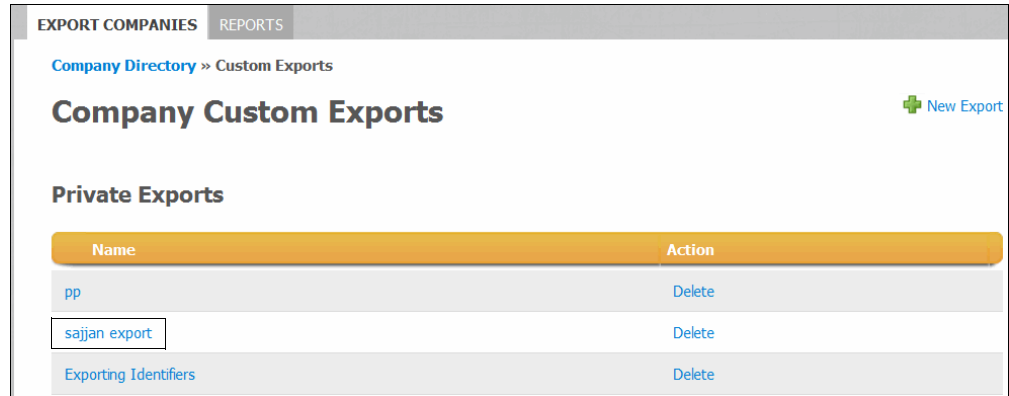
Note: If you have permission to view the data in a masked company custom field, the data displays. If you do not have permission to view the data, 10 asterisks display instead.

To run a company custom export

- 1 Click **Profiles > Companies**.

The All Companies list page opens.
- 2 From the Actions drop-down list, click **Custom Export**.
- 3 Select the companies whose data you want to include in the export.
 - Select **All Search Results**, then click **OK**.
 - To include specific companies, select the check boxes for the companies you want to include in the export, select **Selected Rows**, and click **OK**.

The Company Custom Exports list page opens.



- 4 Click the name of the Company Custom Export you want to run. For example, click **sajjan export**.

The page that opens shows the saved export settings.

- 5 Click **Run**.

The Run Summary dialog box opens.

- 6 Change the filename, if needed, and then click **Run**.

- 7 Type a file name, and click **Run**.

Note: Default file name: *Company_Custom_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

- 8 Open or save the file to your computer.

Note: Large exports (processing times of more than 30-40 seconds) run in the background. The generated export file is sent to you as a download link in an email. The link is available for seven days. Smaller exports are downloaded instantly.

Editing a Company Custom Export

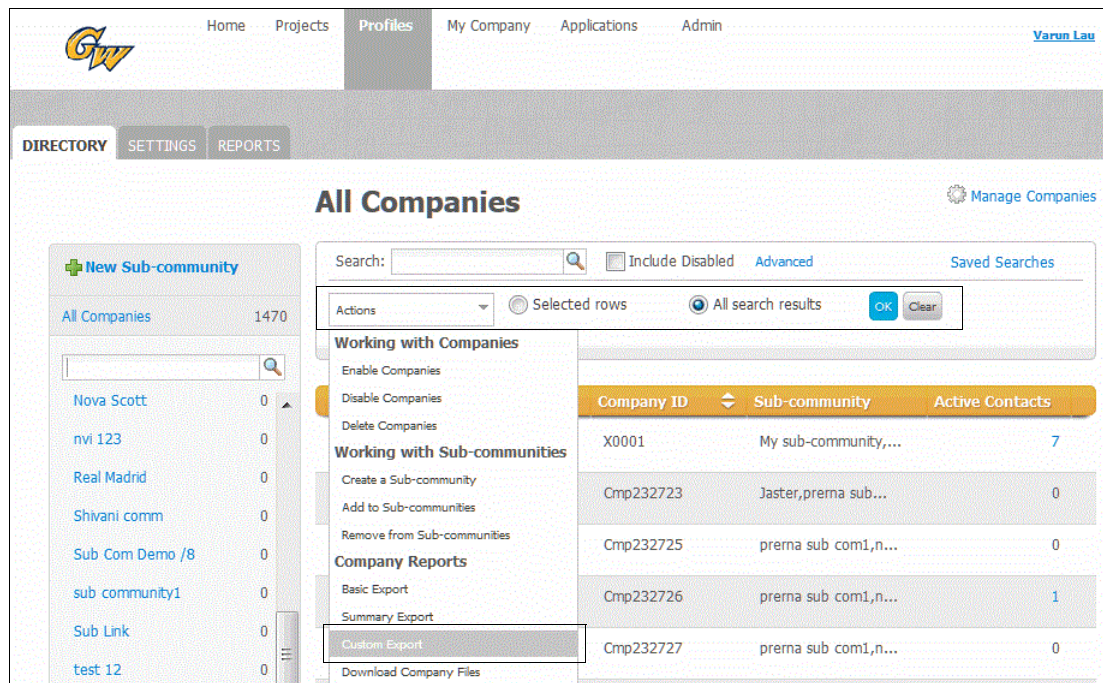
You can edit any custom export that you created.

Note: You cannot edit a custom export created by other users, or a custom export that is being used by a saved report. If you own the saved report, you can edit the report that is using the export format, and change it to use a different format. Then you can delete the export format that was originally used.

To edit a company custom export

- 1 Click **Profiles > Companies**.

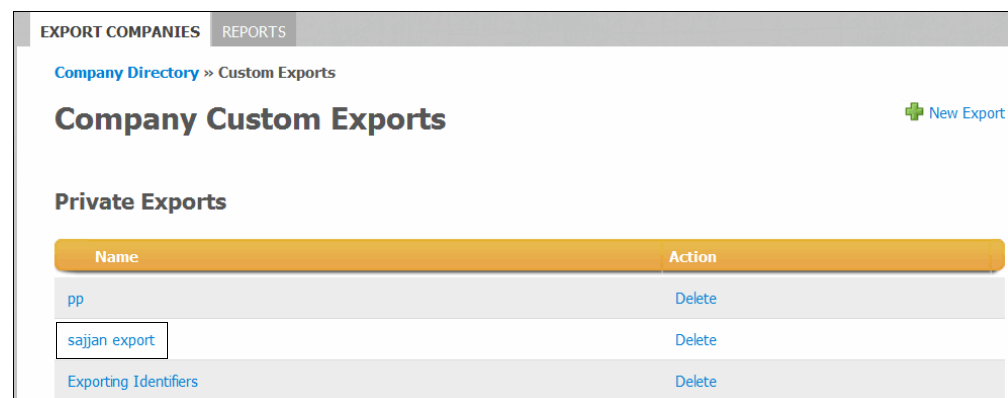
The All Companies list page opens.



2 From the Actions drop-down list, select **Custom Export**.

3 Select **All Search Results**, then click **OK**.

The Company Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Others).



4 Click the name of the custom export you want to edit.

Note: You cannot edit a custom export created by other users, or a custom export that is being used by a saved report. If you own the saved report, you can edit the report that is using the export format, and change it to use a different format. Then you can delete the export format that was originally used.

5 Modify the export as described in "Creating General Settings for a Company Custom Export" on page 204.

6 Click **Save** to save your changes.

Deleting a Company Custom Export

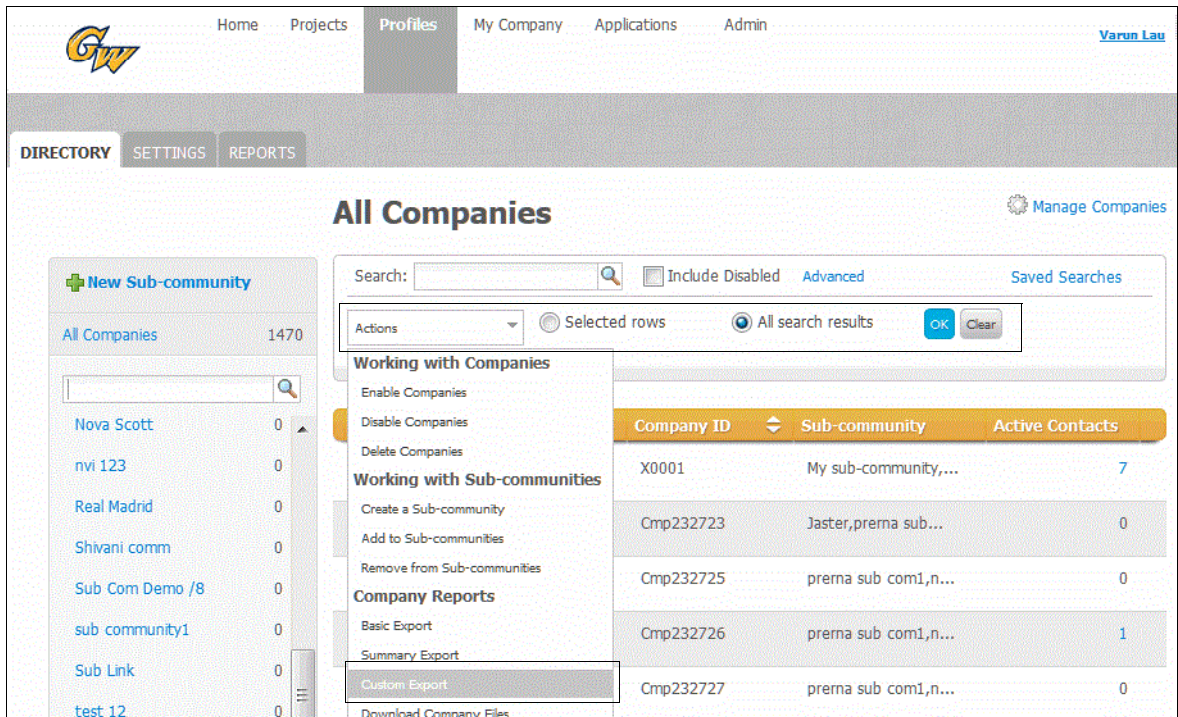
Users who create a custom export, as well as Community Administrators, can delete the custom export.

Note: The custom export cannot be deleted if it is being used by a saved report, or if it is being used in a report. If it is being used, a message lists the users who are using the Custom Export, so you can contact them to change the export to a different one. When no reports are using the Custom Export, you can delete it.

To delete a company custom export

- 1 Click **Profiles > Companies**.

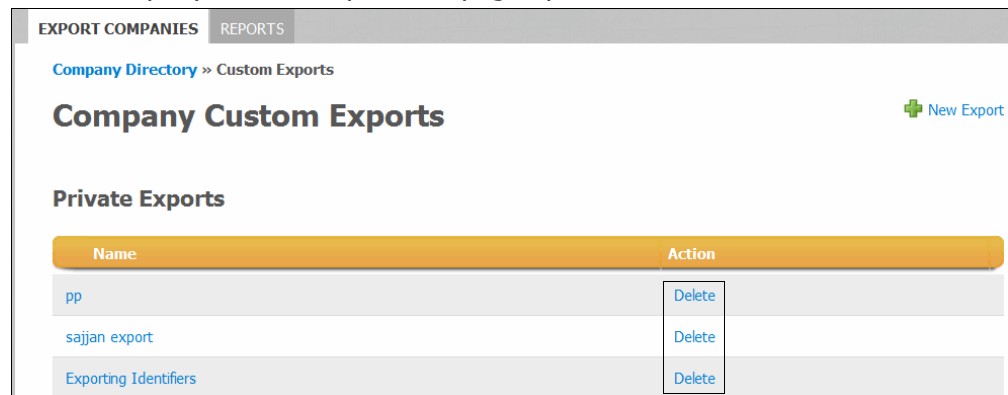
The All Companies list page opens.



- 2 From the Actions drop-down list, select **Custom Export**.

- 3 Select **All Search Results**, then click **OK**.

The Company Custom Exports list page opens.



- 4 Click **Delete** for the export you want to delete.

One of the following occurs:

- A message asks you to confirm your selection. Click **OK**.
- If the custom export is being used by a saved report, a message indicates the export cannot be deleted until you assign a different export to the report.

Contact Custom Exports

Contact custom exports let you define the general criteria and custom fields to include in the export; you can also specify additional export options for the Excel file.

Topics include:

- ["Creating General Settings for a Contact Custom Export" on page 211](#)
- ["Configuring the Format for a Contact Custom Export" on page 213](#)
- ["Running a Contact Custom Export" on page 215](#)
- ["Editing a Contact Custom Export" on page 217](#)
- ["Deleting a Contact Custom Export" on page 218](#)

Creating General Settings for a Contact Custom Export

Use this procedure to define the data you want to include in an Excel (.xls) file when exporting company information.

Note: To define how the data will look in the Excel file, go to ["Configuring the Format for a Contact Custom Export" on page 213](#) after completing this procedure.

To create the general settings for a contact custom export

1 Click **Profiles > Contacts**.

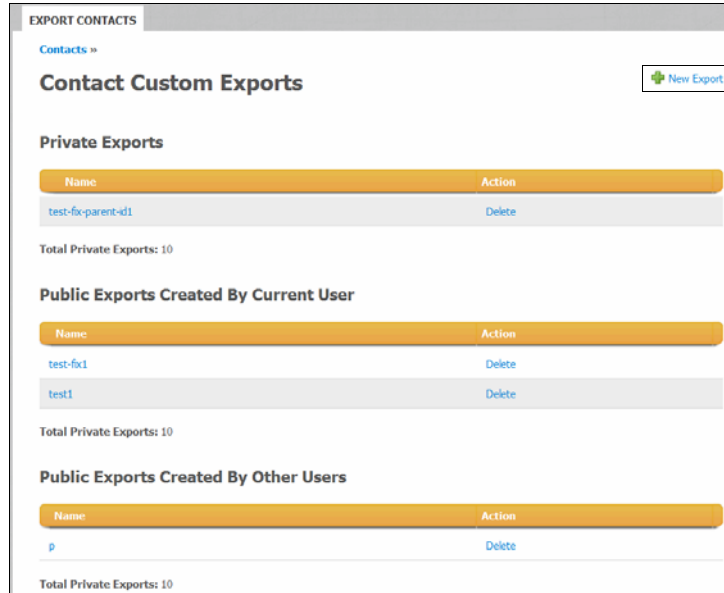
The Contacts list page opens.

2 From the Actions drop-down list, select **Custom Export**.

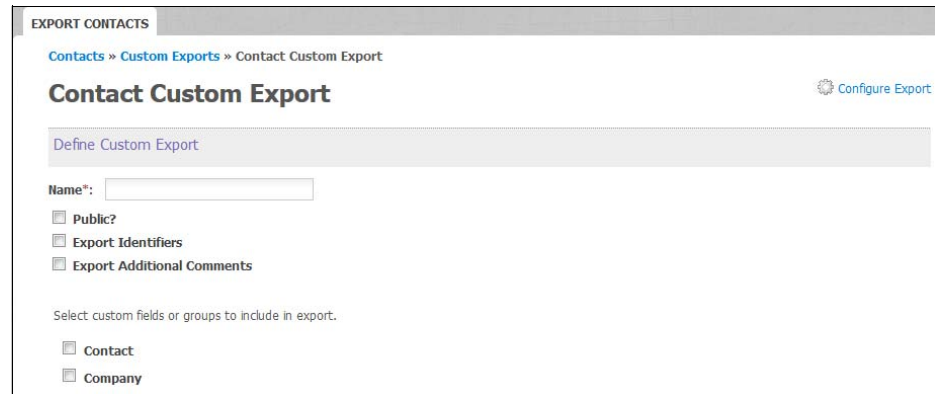
3 Select the contacts whose data you want to include in the export.

- To include all contacts, select **All Search Results**, then click **OK**.
- To include specific contacts, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Contact Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Other Users).



- 4 To define the general settings for a new custom export, click **New Export**. The Contact Custom Export page opens.



- 5 Define the general settings for the export:
 - a In **Name**, type the name of the custom export.
 - b In **Public?**, if you want the export to be:
 - Private, do not select the **Public?** check box.
 - Available to other users, select the **Public?** check box.
 - c Select the **Export Identifiers** check box if you want to export the identifiers, in addition to the labels, for the custom fields. For example:

Multiple Choice (Label)	Multiple Choice
Hammer	H0023

Note: Exporting the identifiers provides the information that is needed to import the file back into Active Community. Applies only to

Multiple Choice, Drop List, and Radio Button List custom fields. Only available to users with appropriate permissions.

- d Select the **Export Additional Comments** check box if you want to export the “Additional Comments” associated with the custom field values. The export of additional comments for a custom field is only available if the “Add Comment Field” has been enabled for that field.
- e Under **Select custom fields for groups to include in export**, select one or both of the following check boxes:
 - **Contact**—Select this check box to display additional contact custom fields or groups whose data you can include or exclude from the custom export.

Select custom fields or groups to include in export.

Contact

Contact Details

Contact Non Table Group

Select: All None

Radio Question-1

Drop Question-1

Number Question-1

New Question-1

Contact Table Group

Mixed Question Group

Contact Others Group

- **Company**—Select this check box to display additional company custom fields or groups whose data you can include or exclude from the custom export.

Select custom fields or groups to include in export.

Contact

Company

Company Details

Select: All None

Company Name

Company ID

Sub-community

Parent Company

- f In the additional check boxes that display under Contact or Company, select the custom fields or groups for which you want to include data in the export. As you select a check box, additional fields display so you can include or exclude them from the custom export.

- g Click **Save**.

The Contact Custom Export page refreshes and lists the new export.

- 6 Go to [“Configuring the Format for a Contact Custom Export.”](#)

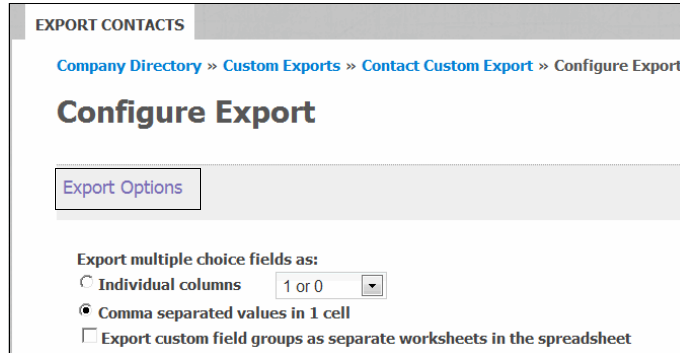
Configuring the Format for a Contact Custom Export

Use this procedure to define the settings that control how exported contact data will look in the Excel file.

To configure the format for a contact custom export

- 1 After [“Creating General Settings for a Contact Custom Export”](#) on page 211, on the Contact Custom Exports page, select the link for the custom export.

- 2 To define Excel format settings for the export, click **Configure Export**. The Configure Export page opens. The top part of the page is shown.

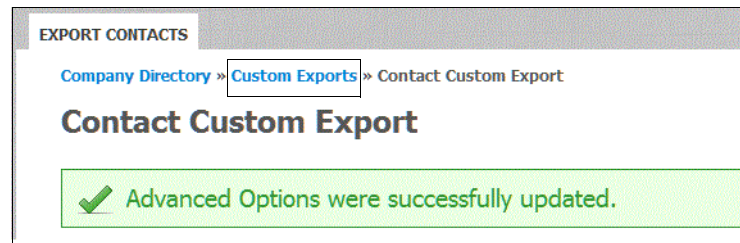


- 3 Under Export Options, do the following:
 - a Select one of the radio buttons to indicate how you want to export multiple choice fields (Individual Columns or Comma separated values in 1 cell).
 - b To export custom field groups as separate worksheets, select that check box.
- 4 Under Summarize Fields, to be able to view a summary export in an Excel file (see ["Running a Contact Summary Export" on page 198](#), select the **Add Summary Export** check box.



- 5 Click **Save**.

The custom export configuration is saved.



- 6 To return to the Contact Custom Exports page, click the **Custom Exports** breadcrumb.
- 7 Perform the appropriate action:
 - a To save the export, click **Save**. You have completed the procedure. The export settings are saved.
 - b To run the export, click **Run**.
 - c When the Run Custom Export page opens, click **Run**.

Note: Default file name: *Contact_Custom_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.
 - d Open or save the file to your computer.

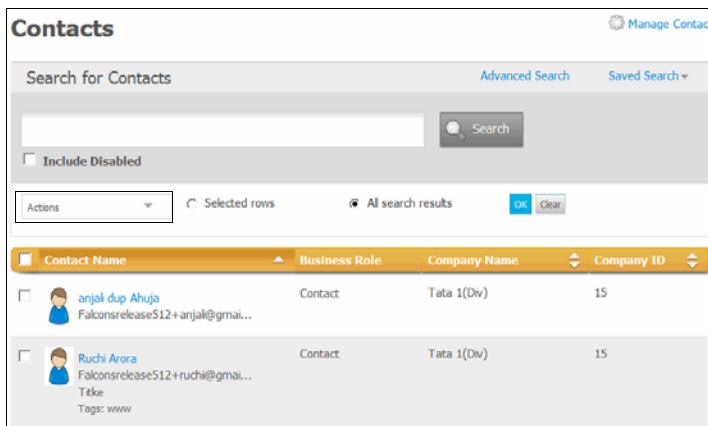
Running a Contact Custom Export

You can run a custom export you created previously (see “Creating General Settings for a Contact Custom Export” on page 211 and “Configuring the Format for a Contact Custom Export” on page 213).

To run a contact custom export

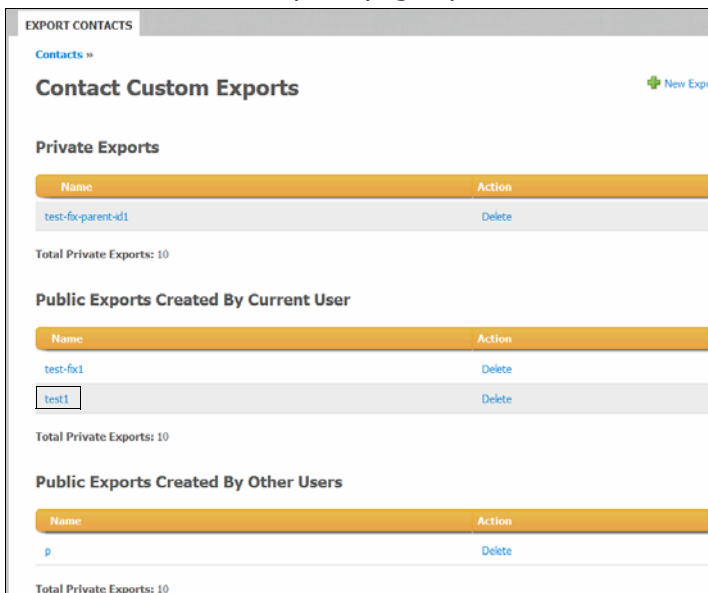
- 1 Click **Profiles > Contacts**.

The Contacts list page opens.



- 2 From the Actions drop-down list, select **Custom Export**.
- 3 Select the contacts whose data you want to include in the export.
 - To include all contacts, select **All Search Results**, then click **OK**.
 - To include specific contacts, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Contact Custom Exports page opens.



- 4 Click the name of the Contact Custom Export you want to run. For example, click **test1**.

The page that opens shows the saved export settings for the export.

5 Click **Run**.

The Run Custom Export dialog box opens.

6 Change the filename, if needed, and then click **Run**.

Note: Default file name: *Contact_Custom_Export_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

7 Open or save the file to your computer.

Note: Large exports (processing times of more than 30-40 seconds) run in the background, and the generated export file is sent to you as a download link in an email. The link is available for seven days. Smaller exports are downloaded instantly.

Editing a Contact Custom Export

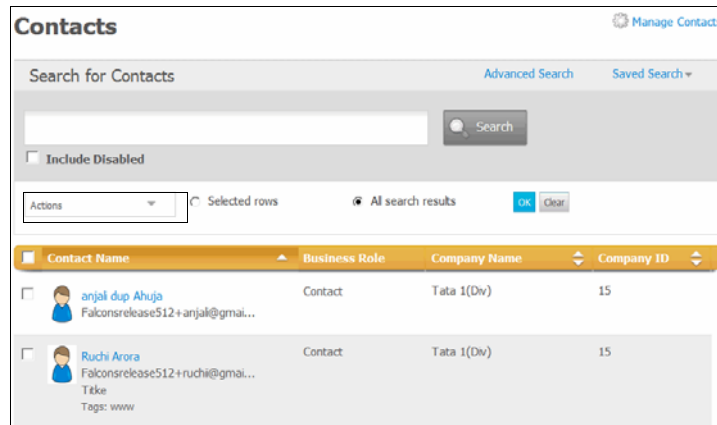
You can edit any custom export that you created.

Note: You cannot edit a custom export created by other users.

To edit a contact custom export

- 1 Click **Profiles > Contacts**.

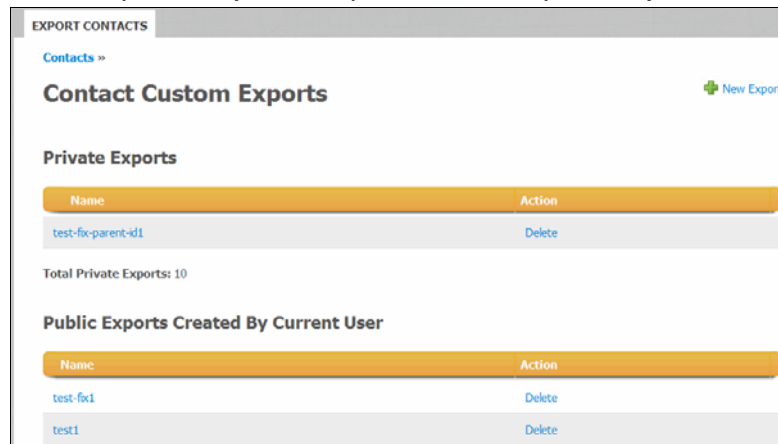
The Contacts list page opens.



- 2 From the Actions drop-down list, select **Custom Export**.

- 3 Select **All Search Results**, then click **OK**.

The Contact Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Others).



- 4 Click the name of the custom export you want to edit.

Note: You cannot edit a custom export created by other users.

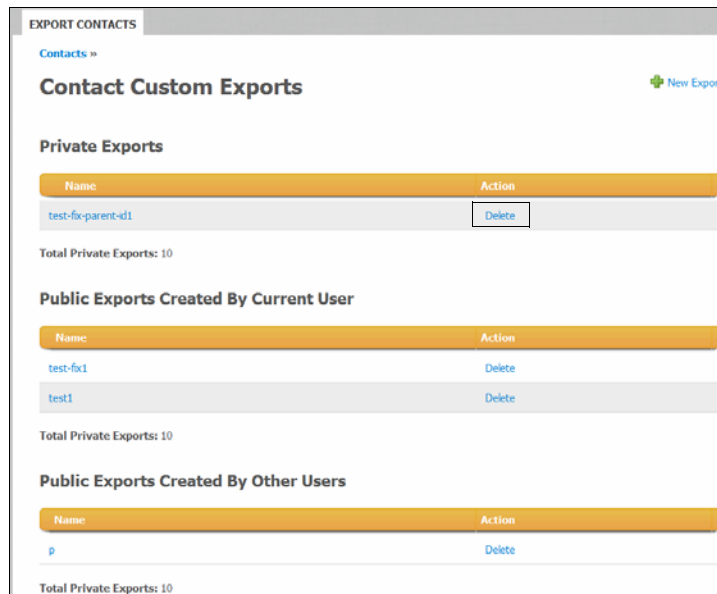
- 5 Modify the export as described in "Creating General Settings for a Contact Custom Export" on page 211.
- 6 Click **Save** to save your changes.

Deleting a Contact Custom Export

Users who create a custom export, as well as Community Administrators, can delete the custom export.

To delete a contact custom export

- 1 Click **Profiles > Contacts**.
 The Contacts list page opens.
- 2 From the Actions drop-down list, select **Custom Export**.
- 3 Select **All Search Results**, then click **OK**.
 The Contact Custom Exports list page opens.



- 4 Click **Delete** for the export you want to delete.
 A message asks you to confirm your selection.
- 5 Click **OK**.
 The export is deleted.

Accessing Impersonation Logs

Security role: Community Administrator

Security permission: Community Permissions > Manage Community

Hub community administrators can access logs that identify those OpenText administrators who used the impersonation tool to act on behalf of their hub. This information may be necessary if an audit is conducted.

To identify users of the impersonation tool

- 1 Click **Admin > Access Logs** tab.

The Access Logs page opens.

Impersonation Admin	User ID	Start Time	End Time	Duration
actest707+praveen@gmail.com	actest707_100@gmail.com	2019-09-10 06:13:19 UTC		
actest707+praveen@gmail.com	actest707_100@gmail.com	2019-09-10 06:44:50 UTC	2019-09-10 07:14:52 UTC	0:30:02
actest707+praveen@gmail.com	actest707_100@gmail.com	2019-09-10 06:16:03 UTC	2019-09-10 06:16:39 UTC	0:00:36
actest707@gmail.com	actest707_100@gmail.com	2019-09-05 11:46:51 UTC	2019-09-05 11:47:12 UTC	0:00:21
actest707@gmail.com	actest707_100@gmail.com	2019-09-05 11:46:04 UTC	2019-09-05 11:46:51 UTC	0:00:47
actest707@gmail.com	actest707_100@gmail.com	2019-09-05 11:45:08 UTC	2019-09-05 11:46:04 UTC	0:00:56
actest707@gmail.com	actest707_100@gmail.com	2019-09-05 11:41:20 UTC	2019-09-05 11:45:08 UTC	0:03:48
actest707@gmail.com	actest707_100@gmail.com	2019-09-04 12:12:20 UTC	2019-09-04 12:42:21 UTC	0:30:01
actest707+praveen@gmail.com	actest707_100@gmail.com	2019-09-04 12:12:54 UTC	2019-09-04 12:13:36 UTC	0:00:42

Showing all

The access log columns display the following information:

- Impersonation Admin - The administrator who was acting on behalf of the hub
- User ID - The user on whose behalf the impersonation was done
- Start Time - The impersonation session start time
- End Time - The impersonation session end time
- Duration - The duration of the session

Custom fields are located on your partner's company or contact profile. They are input fields that allow the hub to collect and keep important information about partners, customers, sales representatives, or other contacts in your community. Custom fields supplement the basic information contained in core fields.

Users respond to the hub's custom field questions when updating a company or contact profile. They can be reminded to update all or part of the profile based on freshness settings. Freshness settings define the interval of time after which Active Community sends profile update reminder emails.

Custom fields consist of custom field groups, custom field questions, and custom field choices. After defining custom fields, you can specify which roles can view or edit custom field groups, including questions in the group.

Community administrators can export a custom fields configuration to send to OpenText support to assist in debugging and resolving issues faced by customers, and an exported configuration can also be used by OpenText administrators for internal use.

Topics include:

- ["Custom Field Overview" on page 221](#)
- ["Adding Custom Field Groups" on page 240](#)
- ["Adding Custom Field Questions to Groups" on page 243](#)
- ["Adding Choices to Custom Field Questions by Format" on page 248](#)
- ["Working with Custom Fields" on page 258](#)
- ["Ensuring Contacts Respond to Custom Field Questions" on page 271](#)
- ["Exporting a Custom Fields Configuration" on page 272](#)

Custom Field Overview

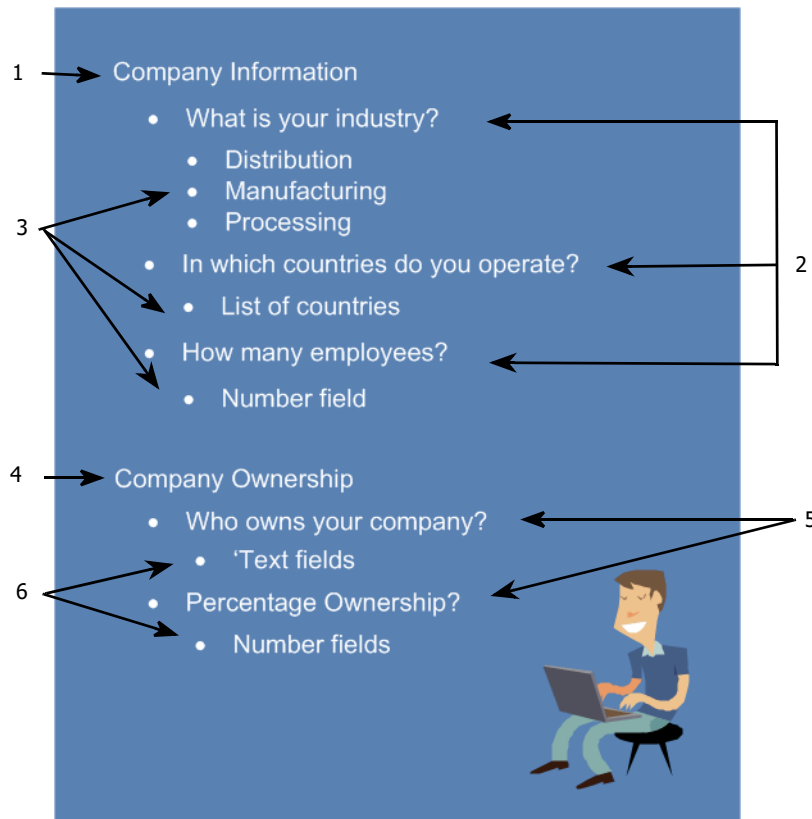
Custom fields can cover a number of topics, such as sales, pricing, compliance, quality, and others.

Custom fields consist of custom field groups, custom field questions, and custom field choices. Custom fields can be designed to:

- Indicate whether your suppliers are compliant with an industry standard
- Allow users to upload a certificate file
- Gather company information, such as average sales volume or inventory capacity

The following examples outline how custom fields might be used.

The graphic lists two custom field groups, Company Information and Company Ownership. Each group contains questions and question choices.



Understanding the graphic:

Key	Description
1	Custom field group 1
2	Custom field questions for field group 1
3	Custom field choices for field group 1
4	Custom field group 2
5	Custom field questions for field group 2
6	Custom field choices for field group 2

The table provides the same information in a different way.

Custom Field Groups	Custom Field Questions	Custom Field Choices
<ul style="list-style-type: none"> ■ Company Information 	<ul style="list-style-type: none"> ■ What is your industry? 	<ul style="list-style-type: none"> ■ Manufacturing ■ Processing ■ Distribution
	<ul style="list-style-type: none"> ■ In which countries do you operate? 	List of countries
	<ul style="list-style-type: none"> ■ How many employees? 	Number field
<ul style="list-style-type: none"> ■ Company Ownership 	<ul style="list-style-type: none"> ■ Who owns your company? 	Text fields for names
	<ul style="list-style-type: none"> ■ Percentage ownership? 	Number fields for numbers

Contacts answer the questions when updating a company or contact profile.

Topics include:

- ["Custom Field Planning" on page 223](#)
- ["Custom Field Groups" on page 224](#)
- ["Custom Field Question Formats" on page 226](#)
- ["Dependent Custom Field Questions" on page 231](#)
- ["Masked Fields" on page 232](#)
- ["Custom Field Groups as Data Tables" on page 233](#)
- ["Custom Field Options" on page 235](#)
- ["Choices and Values" on page 237](#)
- ["Help Icon Text" on page 237](#)
- ["Instruction Text" on page 237](#)
- ["Language Options for Custom Field Groups, Questions, and Choices" on page 238](#)
- ["How Do I?" on page 238](#)

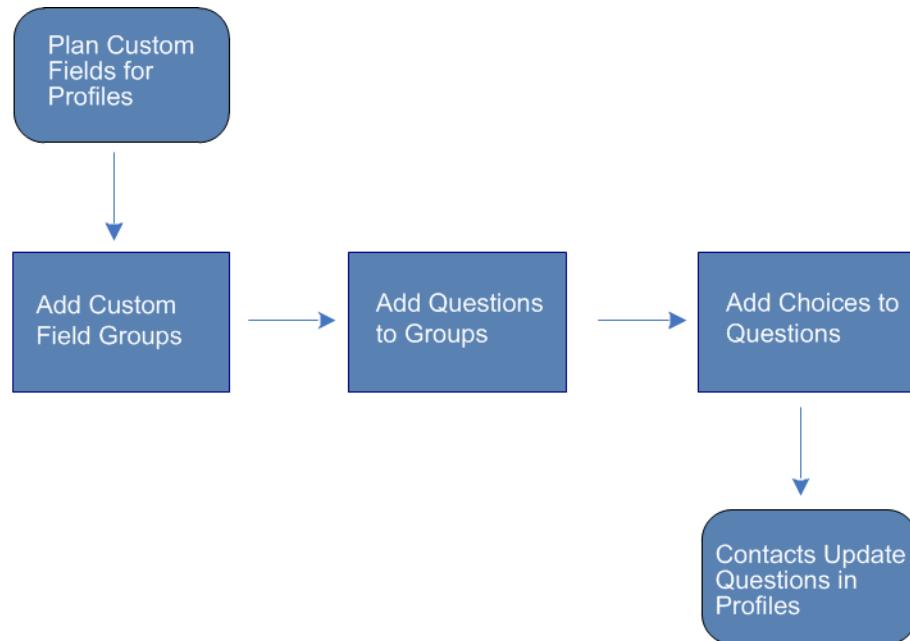
Custom Field Planning

Because custom field groups, questions, and choices let you request important information about companies and contacts in your community, careful planning is required.

Prerequisites

- Consider the types of information you want to gather from your community.
- Design custom field groups, questions, and choices after reviewing the information in this section.
- Create custom field groups first, then questions within the group, and then choices for each question.

The graphic outlines the custom field setup process.



Custom Field Groups

Custom field questions and choices are contained in custom field groups. Each group is displayed as a tab in a company or contact profile. When a tab is selected, the questions and choices display.

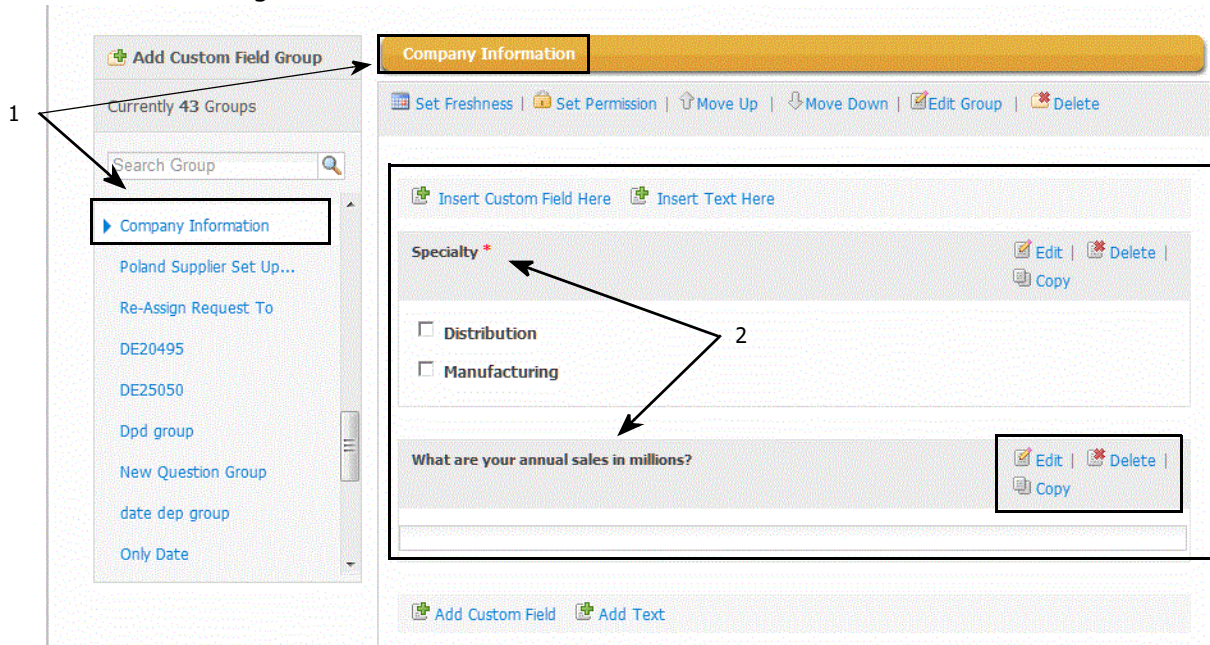
For example, a custom field group named Company Information might include custom field questions named Specialty or Annual Sales.

Topics include:

- ["Sample Custom Field Group During Creation" on page 225](#)
- ["Sample Custom Field Group in a Profile" on page 225](#)
- ["Sample Custom Field Group with Saved Responses" on page 226](#)

Sample Custom Field Group During Creation

This first graphic shows a custom field group, Company Information, while it is being created.



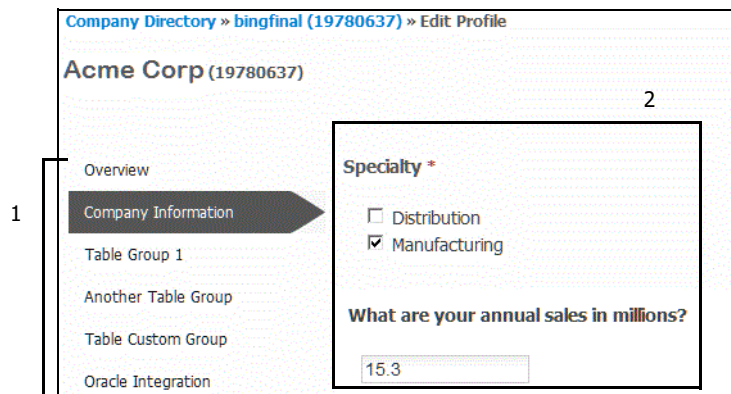
The parts of a field group:

Key	Description
1	Custom field group name
2	Custom field questions and custom field choices

The name of the custom field group displays as a tab. When the tab is selected, the questions for the custom field group display. The questions can be modified using the various options on the page.

Sample Custom Field Group in a Profile

The next graphic shows how the Company Information custom field group and its questions display when contacts edit their company profiles.



The custom field groups and their questions:

Key	Description
1	Group tabs are in the first column. You can select a custom field group tab, then answer custom field questions associated with that tab.
2	Contacts answer custom field questions in contact or company profiles.

Similarly, the name of the custom field group displays as a tab. When the tab is selected, the custom field questions display. Contacts edit their profiles to answer the questions.

Sample Custom Field Group with Saved Responses

After a contact saves their answers, they are stored in their company or contact profiles.



Custom Field Question Formats

Custom field questions can be defined in a variety of formats, including text boxes, multiple choice questions with check boxes, or the ability to upload a file to Active Community. A question’s format determines how a custom field displays in a company or contact profile.

The following topics describe each custom field format. Each topic includes an example of the custom field as users will see it.

- “Drop List”
- “Multiple Choice”
- “Radio Button List”
- “True/False”
- “Yes/No”
- “Text”
- “Number”
- “Date”
- “Text Area”
- “File Download”
- “Display Image”
- “File Upload”
- “Company Link”
- “Specialized”
- “Number Formula”
- “Text Formula”
- “Date Formula”
- “True/False Formula”

Note: Any custom field format can also include “Instruction Text,” that provides context (or instruction) for the question.

Drop List

Use the Drop List format to create a custom field that is a drop-down list with multiple options. Users can select one answer from the list.

A Drop List format can specify a value as a default answer. In addition, values for Drop List formats can be imported into Active Community.

For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248.](#)

Multiple Choice

Use the Multiple Choice format to create a custom field with one or more check boxes that users can select to answer a question. Users can select more than one check box.

A Multiple Choice format can specify a value as a default answer. In addition, values for Multiple Choice questions can be imported into Active Community.

For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248.](#)

Radio Button List

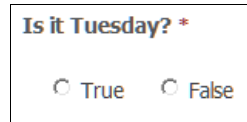
Use the Radio Button List list format to create a custom field with a list of one or more answers with radio buttons. Users can select only one answer from the list.

A Radio Button List format can specify a value as a default answer. In addition, values for Radio Button List custom fields can be imported into Active Community.

For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248.](#)

True/False

Use the True/False format for custom fields if you want to use a pair of radio buttons with True or False as the answer to the question. Users can select either True or False.



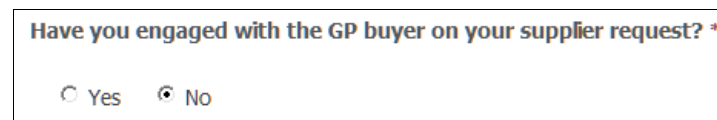
Is it Tuesday? *

True False

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Yes/No

Use the Yes/No format if you want the custom field to use a pair of radio buttons with Yes and No as the answer to the question. Users can select either Yes or No.



Have you engaged with the GP buyer on your supplier request? *

Yes No

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Text

Use the Text format if you want to use a text box with a single line of text (up to 256 characters). Users type answers to the question in the text box.



If no please provide reason *

Please engage with your Group Procurement Buyer before proceeding

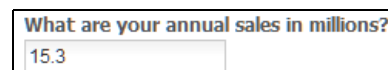
Note: Any custom field format can also include ["Instruction Text,"](#) that provides context (or instruction) for the question. In this example, the instructional text is "Please engage with your Group procurement Buyer before proceeding."

You can use a Text custom field to automatically populate the Company ID as long as Enable Masking, Set Default Answer, and Make Dependent on Another Question options are not enabled. See ["Defining Core Fields in Registration Requests" on page 431](#).

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Number

Use the Number format if you want the custom field to use a box that contains a single line of numbers. Users can enter numbers into the box. If characters are entered, they will not display in the response.



What are your annual sales in millions?

You can use a Number custom field (for example, a DUNS number) to automatically populate the Company ID as long as Enable Masking, Set Default Answer, and Make Dependent on Another Question options are not enabled. See ["Defining Core Fields in Registration Requests" on page 431.](#)

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248.](#)

Date

Use the Date format to specify a calendar date in MM/DD/YYYY format.

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248.](#)

Text Area

Use the Text Area format if you want the custom field to use a text box that can contain multiple lines of text. The Text Area format supports pressing Enter to create new paragraphs.

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248.](#)

File Download

Use the File Download format to create custom fields that allow hub contacts to upload files from their computer or network server to spoke company profiles. Each spoke company sees the *same* file, such as terms and conditions, policies, or newsletters.

File Download custom field questions are populated when configuring a custom field. The maximum file size is 50 MB.

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248.](#)

Display Image

Use the Display Image format to create a custom field that allows contacts to upload and show an image file, such as a logo or product image, in a custom field. The file must be in GIF, JPG, or PNG format. The maximum file size is 50 MB.



Note: The image can be a maximum of 450 pixels wide by 250 pixels high. If the image is larger, it will be resized and scaled down to 450 x 250, which might cause some distortion of the image.

For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248](#).

File Upload

Use the File Upload format to create a custom field that allows hub contacts to upload multiple files from their computer or network server to spoke company profiles. Each spoke company sees *different* files, such as scorecards, price lists, or signed contracts.

Files can be in any format. The maximum file size is 50 MB.



For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248](#).

Company Link

Use the Company Link format to create a custom field with a company hyperlink. The link can be used to navigate to more detailed data within Active Community.



For procedural information, see [“Adding Choices to Custom Field Questions by Format” on page 248](#).

Specialized

Use the Specialized format to collect specific types of data. Currently, there are two specialized format configuration options:

- **Email** - Selecting the Email option allows hubs to collect an email address and verify that it is correctly formatted according to industry standards. The actual value is *not* verified.
- **Tax ID (EIN)** - The Tax ID (EIN) option is only available for company profiles. Selecting this option allows hubs to collect a federal tax ID and verify that it is correctly formatted as an EIN (Employer Identification Number). The system automatically adds the hyphen when you enter the value. The actual value is *not*

verified unless your community enables the Tax ID Verification option. Only one tax ID custom field can be enabled for verification at a time.

Note: To take advantage of the Tax ID Verification option, it must be enabled for your community. Contact Support for assistance.

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Number Formula

Use the Number Formula format to create a custom field that adds or subtracts the values in Number fields and place the result into one field (see ["Adding Formula Custom Field Questions" on page 253](#)).

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Text Formula

Use the Text Formula format to create a custom field that combines the values in multiple Text custom fields into one field (see ["Adding Formula Custom Field Questions" on page 253](#)).

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Date Formula

Use the Date Formula format to create a custom field that adds or subtracts a specified number of days to or from a date (see ["Adding Formula Custom Field Questions" on page 253](#)).

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

True/False Formula

Use the True/False Formula format to create a custom field that uses a true or false answer to one question to populate a value in a different question (see ["Adding Formula Custom Field Questions" on page 253](#)).

For procedural information, see ["Adding Choices to Custom Field Questions by Format" on page 248](#).

Dependent Custom Field Questions

You can hide or display an entire custom field group based on the answer to another custom field question. For procedural information, see ["Creating Dependent Questions" on page 259](#).

Example

For example, suppose you have a custom field group that includes a Yes/No question to indicate whether a business partner agrees with your Terms and Conditions.

If the answer is:

- Yes, you want Active Community to display Financial Information custom field group as a tab in a partner's profile.

- No or blank, you do not want Active Community to display the Financial Information custom field group as a tab in a partner’s profile.

How to Do It

Follow this process for making the Financial Information custom field group depend on the Yes/No answer for Terms and Conditions. When defining the Financial Information group:

- Select the “Make dependent on another question (optional)” check box.
- In Question Name, select Terms and Conditions from the drop-down list.
- In Answer, select Yes. Active Community will display the Financial Information group in the profile only if the answer to Terms and Conditions is Yes.

Make Dependent on Another Question (Optional)

Question Name
Terms and Conditions

Answer
Yes
No

OR
 AND

Masked Fields

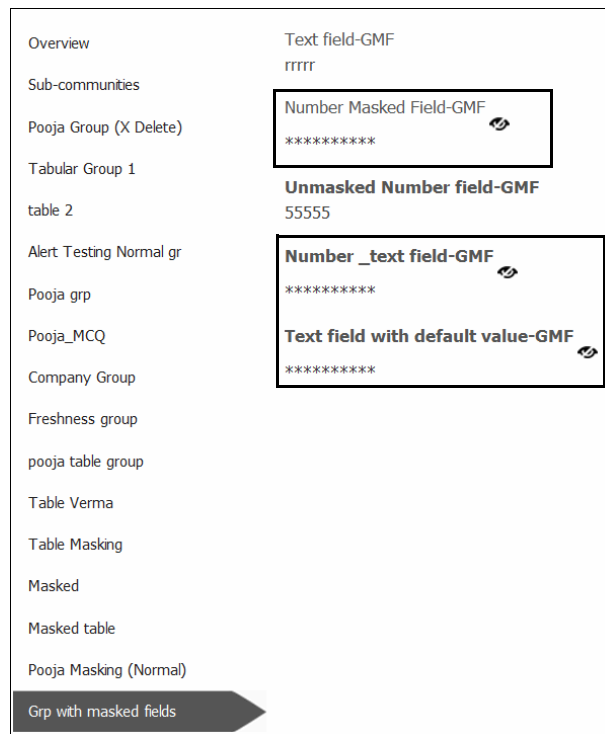
Data masking can be enabled for Text and Number company custom fields so that sensitive data, such as banking information, is hidden from those who do not have permission to view it.

When you view a company profile and data masking is enabled, an icon displays by the field to identify it. If you have permission to view the data in the masked field, the data displays. If you do not have permission to view the data, 10 asterisks display.

Note: You are always able to see your own company’s data for masked custom fields provided that you have “View My Company” permission; however, data is masked for other companies unless you have “View Masked Fields” permission. See [“Roles and Permissions” on page 49](#).

Important: If you have “Edit Company” permission but not “View Masked Fields” permission, you can edit data that displays as asterisks. You will see the data as

you type new information, but as soon as you save it, the data again displays as asterisks.



Set a Custom Field as the Company ID

For Registration only, a custom field can be used automatically as the Company ID so that a relevant value, such as a DUNS number, can identify the company.

The following guidelines apply:

- Only Number, Text and Specialized (Tax ID) custom fields can be used for the Company ID.
- The Enable Masking, Set Default Answer, and Make Dependent on Another Question options *cannot* be enabled for the custom field.
- On the company Registration Core Fields page (**Registration > Admin tab > Core Field Settings > Admin tab > Company in Registration**), select the custom field you want to use as the Company ID.

When a Registration request is approved, the Company ID is automatically populated based on the custom field you designated.

For procedural information, see ["Adding Custom Field Questions to Groups" on page 243](#).

Custom Field Groups as Data Tables

To allow contacts to provide more than one answer to a question, most custom field questions can be displayed as headings in a table. Each column heading in the

table is a custom field question. The questions in each column heading can be in different formats, such as a Text format or Number format.

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	Yes	50
2	Maryanne Brown	Yes	15
3	Elizabeth Winston	No	35

Data tables can be created for these custom field formats: Drop List, Multiple Choice, True/False, Yes/No, Text, Number, Date, Text Area, File Upload, Company Link, and Specialized.

Note: Tabular fields and tabular field groups are not supported in the change management (CM) process.

For procedural information, see ["Creating Questions in Data Tables" on page 262](#).

Example

For example, suppose you want to ask three questions: "Who owns your company?," "Is the owner a U. S. Citizen," and "What is their percentage ownership." Your contacts might have more than one answer to each of the questions.

How to Do It

When defining a custom field group, select the "Display this Group as a table" check box.

Display this Group as a table

When adding custom field questions to the group, create one custom field question for each column you want to display in the table. Select the format that is appropriate for the column. In the example, the first two columns were defined using the Text format. The last column was defined using the Number format.

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	Yes	50
2	Maryanne Brown	Yes	15
3	Elizabeth Winston	No	35

Custom Field Options

When defining custom fields, a series of options are available.

Important: Not all options are available for all formats. Based on your selection, additional fields might display. The additional fields let you refine the question further.

Option	Description
Require Answer to Custom Field (Optional)	<p>Make the question mandatory.</p> <p>Selecting this option displays another option, "Mandatory based on."</p> <p>Note: The "Mandatory based on" option is only applicable to multiple answer custom fields.</p> <div data-bbox="730 638 1455 858" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Require Answer to Custom field (Optional)</p> <p><input checked="" type="checkbox"/> Mandatory based on</p> <p>Question Name</p> <p>Drop List</p> <p>Answer</p> <p>222</p> <p>444</p> <p>555</p> </div> <p>Selecting the "Mandatory based on" check box displays additional fields and allows you to make a custom field mandatory based on the answer to a different custom field.</p> <p>To make a custom field mandatory based on the value of another custom field:</p> <ol style="list-style-type: none"> 1 Select the Require Answer to Custom Field (Optional) check box. 2 Select the Mandatory based on check box. 3 From the Question Name drop-down list, select the custom field that the custom field question is based on. In this example, Drop List is selected. 4 From the Answer drop-down list, select the value that the custom field question is based on. In this example the value 222 is selected. <p>In this example, if the answer to the Drop List question is 222, the original question becomes mandatory and requires an answer. All other answers keep the original custom field optional.</p>
Use First Value as the Default Answer (Optional)	Specify the first value (Position 1) as the default value for the answer for questions that have more than one choice, such as Drop List, Multiple Choice, and Radio Button List.
Add Comment Field (Optional)	Allow the contact to add text comments (up to 256 characters) when answering the question.

Option	Description
Add Validation Rule (Optional)	<p>Specify a condition such as:</p> <ul style="list-style-type: none"> ■ "On or before today" or "On or after today" for a Date question ■ "Min Number" and "Max Number" for a Number question ■ "Only Allow Numeric Values" for a Text question ■ "Min Length" and "Max Length" for a Text question <p>If the same number is entered in both the Min Length and Max Length fields, the Append Leading Zeroes field displays. Select this if you want zeroes to be appended in front of the entered data.</p> <p>For example, if the value in the min/max length is 8 and a question is answered as 123456, Active Community adds two zeroes in front of the answer so the total number of characters equals the min/max length (in this example, 00123456).</p> <p>The Append Leading Zeroes field can be used with or without the Only Allow Numeric Values field; that is, you can append zeroes to both numeric and alphanumeric values.</p> <div data-bbox="794 852 1382 1087" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Add Validation Rule (Optional)</p> <p>Text must be:</p> <p>Min Length <input type="text" value="8"/> Max Length <input type="text" value="8"/></p> <p><input checked="" type="checkbox"/> Only Allow Numeric Values</p> <p><input checked="" type="checkbox"/> Append Leading Zeroes</p> </div>
Make Dependent on Another Question (Optional)	<p>Make a question conditional based on the answer to another question. The other question must have already been defined (see "Dependent Custom Field Questions" on page 231 and "Creating Dependent Questions" on page 259).</p>
Set Default Answer (Optional)	<p>Specify a default value for the answer, as follows.</p> <p>Note: Fields with default values cannot be masked.</p> <ul style="list-style-type: none"> ■ True/False—Select True or False as the default answer ■ Yes/No—Select Yes or No as the default answer ■ Text—Type the default answer ■ Number—Type the default answer ■ Dates—Select "Set Current Date" or "Select Date" and select the date from the calendar as the default answer ■ Text Area—Type the default answer (255 character limit)
Enable Multiple Values (Optional)	<p>Allow more than one value to be added where values are separated by a comma.</p>

Option	Description
Enable Masking (Optional)	<p>Select to hide company data, such as banking information, from those who do not have permission to view it. Masked fields cannot have default values.</p> <p>Note: Only available for Text and Number company custom fields. You are always able to see your own company's data for custom fields provided that you have "View My Company" permission. Data is masked for custom field data for other companies unless you have "View Masked Fields" permission. See "Working with Security Roles" on page 55 for information on permissions. See "Using Auto-Fill" on page 10 to understand how the data is displayed in a company profile.</p>
Enable Tax ID Verification (Optional)	<p>Provides the ability to verify a tax ID after it is entered. Only one tax ID custom field can be enabled for verification at a time. If a different tax ID field has already been enabled, the check box is unavailable.</p> <p>Note: To take advantage of the Tax ID Verification option, it must be enabled for your community. Contact Support for assistance.</p>

For procedural information, see ["Adding Custom Field Questions to Groups" on page 243](#).

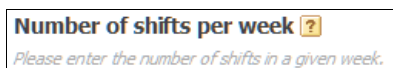
Choices and Values

Values are contacts' responses to custom field questions. For example, when contacts edit their profiles, they might find a question titled: "What is your industry?" The question includes three choices: Distribution, Manufacturing, or Processing. If a contact selects Manufacturing, the value for that question is Manufacturing for that contact.

In another example, a question titled "Are you a U.S. citizen?" has two choices: Yes or No. If a contact selects No, the value for the "Are you a U.S. citizen?" question is No for that contact.

Help Icon Text

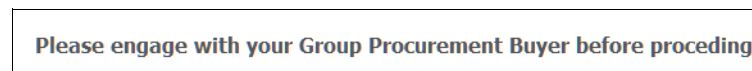
When defining a custom field question, use the Instruction field to add help text for a question. The text displays when the contact clicks the help icon for the question.



For procedural information, see ["Creating Help Icon Text" on page 267](#).

Instruction Text

Use the Insert Text Here or Add Text links to enter text in the body of a question. The text can be used for instructions, descriptions, titles, or general information.



For procedural information, see ["Adding Instruction Text" on page 267](#).

Language Options for Custom Field Groups, Questions, and Choices

You can configure custom field groups, questions, and choices in different (supported) languages. After you create a custom field in one language, you can configure it in a second (or more) language(s). Then, for example, when a user accesses Active Community in English, they see the custom field in English, and when they access Active Community in Spanish (or change the language to Spanish), they see the custom field in Spanish.

For procedural information on configuring a custom field in a different language, see ["Configuring a Custom Field Group, Question, or Choice in a Different Language" on page 271](#).

To change the display language for Active Community, see ["Changing Your Language" on page 11](#)).

How Do I?

To better understand your options when designing custom field groups, questions, and choices, you need to select various options. The table lists a few options to consider. You will choose from among these options when creating custom fields.

If you want to...	Choose (or use) the following options:	When you are:
Add Custom Fields		
Add a custom field group	<ul style="list-style-type: none"> ■ Profiles > Companies > Settings tab > Custom Field ■ Profiles > Contacts > Custom Fields tab 	<ul style="list-style-type: none"> ■ "Adding Custom Field Groups" on page 240
Add a custom field question		<ul style="list-style-type: none"> ■ "Adding Custom Field Questions to Groups" on page 243
Add choices to a question		<ul style="list-style-type: none"> ■ "Adding Choices to Custom Field Questions by Format" on page 248 or ■ "Importing Custom Field Values Using a CSV File" on page 257
Add formula questions		<ul style="list-style-type: none"> ■ "Adding Formula Custom Field Questions" on page 253
Work with Custom Fields		
Search for questions	<ul style="list-style-type: none"> ■ In Search Group, start typing the name of the question 	<ul style="list-style-type: none"> ■ "Finding Custom Field Groups" on page 259
Add dependent questions	<ul style="list-style-type: none"> ■ Select "Make Dependent on Another Question" check box when adding a group 	<ul style="list-style-type: none"> ■ "Creating Dependent Questions" on page 259
Add questions as column headings in a table	<ul style="list-style-type: none"> ■ Select "Display as columns in a table" when adding a group 	<ul style="list-style-type: none"> ■ "Creating Questions in Data Tables" on page 262
Re-sequence custom field tabs	<ul style="list-style-type: none"> ■ Select a group tab, then click Move Up or Move Down 	<ul style="list-style-type: none"> ■ "Re-Sequencing Custom Field Group Tabs" on page 264
Re-sequence custom field questions	<ul style="list-style-type: none"> ■ Select the appropriate custom field question in a group, then drag and drop the question to a different position in the group 	<ul style="list-style-type: none"> ■ "Re-Sequencing Custom Field Questions" on page 265

If you want to...	Choose (or use) the following options:	When you are:
Add instruction text to a custom field question	<ul style="list-style-type: none"> Click Insert Text Here when defining a question 	<ul style="list-style-type: none"> "Adding Instruction Text" on page 267
Add a help icon to a custom field question	<ul style="list-style-type: none"> Use the Instruction field when defining a question 	<ul style="list-style-type: none"> "Creating Help Icon Text" on page 267
Copy a custom field question	<ul style="list-style-type: none"> Select a group tab, click Edit Group, find the question, click Copy. 	<ul style="list-style-type: none"> "Copying a Custom Field Question" on page 268
Delete a custom field group	<ul style="list-style-type: none"> Select a group tab, click Edit Group, click Delete. 	<ul style="list-style-type: none"> "Deleting a Custom Field Group" on page 269
Delete a custom field question	<ul style="list-style-type: none"> Select a group tab, click Edit Group, find the question, click Delete. 	<ul style="list-style-type: none"> "Deleting a Custom Field Question" on page 270
Configure a custom field group, question, or choice in a different language	<ul style="list-style-type: none"> Add a custom field group, question, or choice in a default language, select a different language, modify the label for the same custom field group, question, or choice in the second language. 	<ul style="list-style-type: none"> "Configuring a Custom Field Group, Question, or Choice in a Different Language" on page 271
Define Permissions and Reminder Email Settings		
Add permissions for custom field groups and questions	<ul style="list-style-type: none"> Select a group tab, click Set Permissions 	<ul style="list-style-type: none"> "Assigning Custom Field Permissions to Security Roles" on page 267"
Add time intervals for reminder emails for custom fields	<ul style="list-style-type: none"> Select a group tab, click Set Freshness 	<ul style="list-style-type: none"> "Defining Freshness Settings for Custom Fields" on page 266
Import Values to Custom Field Groups		
Import custom field values	<ul style="list-style-type: none"> Profiles > Companies > Settings tab > Custom Field > Edit Group Profiles > Contacts > Custom Fields tab > Edit Group 	<ul style="list-style-type: none"> "Importing Custom Field Values Using a CSV File" on page 257
Add Values to Custom Field Questions		
Encourage contacts to respond to custom field questions	Multiple options are available.	<ul style="list-style-type: none"> "Ensuring Contacts Respond to Custom Field Questions" on page 271
Collect Specific Types of Data		
Collect an email address and verify that it is correctly formatted according to industry standards.	<ul style="list-style-type: none"> Profiles > Companies > Settings tab > Custom Field > Insert Custom Field > Specialized > Email Profiles > Contacts > Custom Fields tab > Insert Custom Field > Specialized > Email 	<ul style="list-style-type: none"> Using the "Specialized" custom field question format. "Adding Custom Field Questions to Groups" on page 243
Collect a federal tax ID and verify that it is correctly formatted as an EIN (Employer Identification Number).	<ul style="list-style-type: none"> Profiles > Companies > Settings tab > Custom Field > Insert Custom Field > Specialized > Tax ID (EIN) 	<ul style="list-style-type: none"> Using the "Specialized" custom field question format. "Adding Custom Field Questions to Groups" on page 243
Set a Custom Field as the Company ID		
Set a custom field as the Company ID	Follow the guidelines.	<ul style="list-style-type: none"> "Set a Custom Field as the Company ID" on page 233 "Adding Custom Field Questions to Groups" on page 243

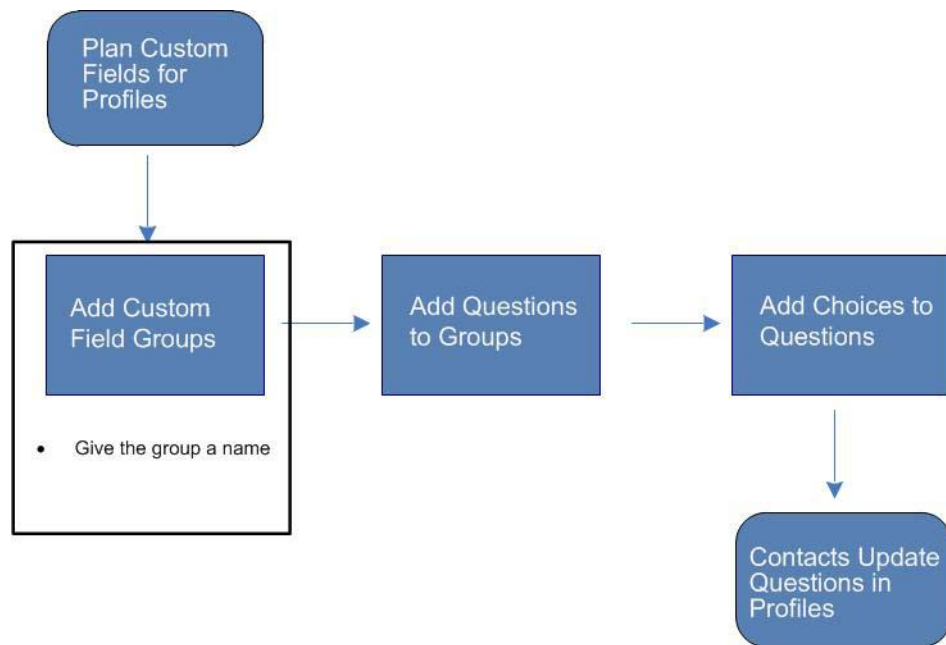
If you want to...	Choose (or use) the following options:	When you are:
Export Custom Field Configurations for a Hub		
Export custom field configurations for a hub	Follow the guidelines.	<ul style="list-style-type: none"> ■ "Exporting a Custom Fields Configuration" on page 272

Adding Custom Field Groups

Security role: Community Administrator

Security permissions required: Custom Field Permissions > Manage Custom Fields

The first phase of the custom field setup process is to add a custom field group and give it a name.



Use this procedure to add *groups* of custom fields to help you categorize information stored in company and contact profiles (see "[Custom Field Overview](#)" on page 221).

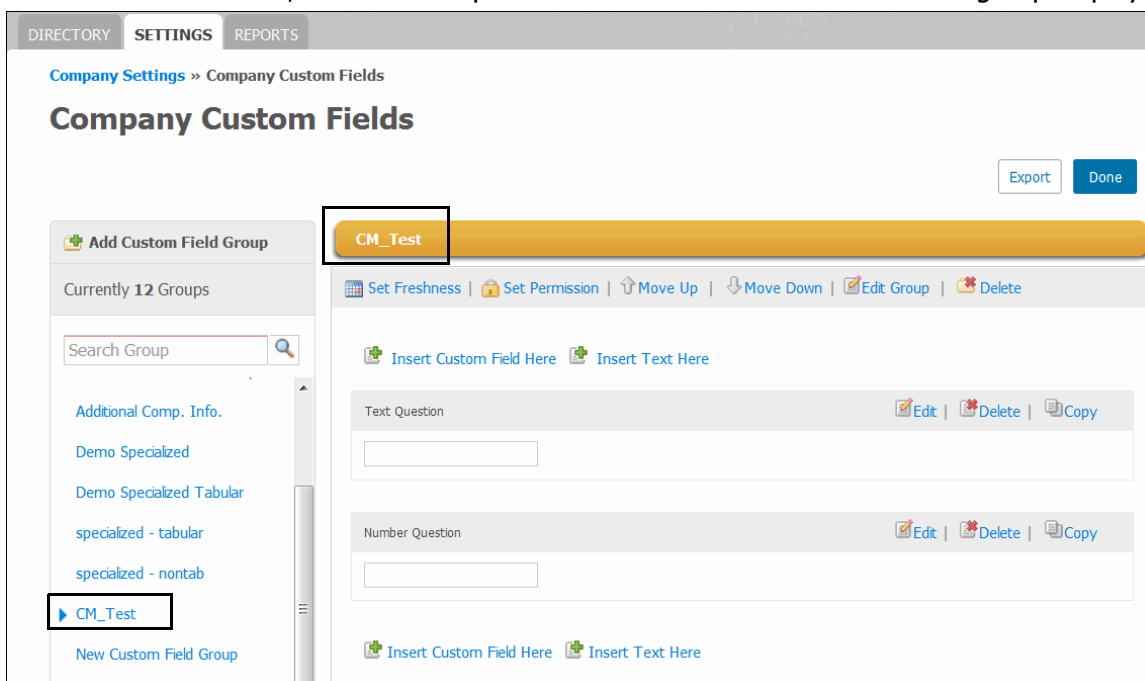
Note: If your company uses the optional Registration module, any custom fields you create can be displayed during the company registration process.

To add a custom field group

1 Perform the appropriate action:

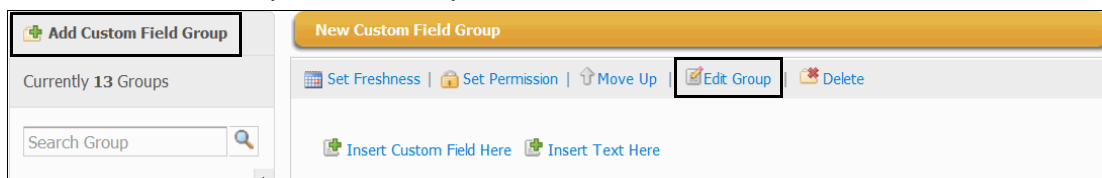
To add a custom field group for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens. It shows any custom field groups that have been defined as tabs. When a tab is selected, custom field questions that have been defined for the group display.



2 Click **Add Custom Field Group**.

The New Custom Field Group section opens. You will replace the "New Custom Field Group" name in step 4.



3 Click **Edit Group**.

The Editing Custom Field Group section opens.

- 4 In Name, type over “New Custom Field Group” and give the group a name, such as “Licensing” or “Company Ownership.”
- 5 In Description, type a general description of the custom group, such as the nature of the questions it contains.
- 6 Select the appropriate check boxes at the bottom of the page to perform the actions described in the following table:

If you want questions in the group to...	Do this:
Display as columns in a table	<ul style="list-style-type: none"> ■ Select the “Display this group as a table” check box (see “Creating Questions in Data Tables” on page 262). <p>Note: Tabular fields and tabular field groups are not supported in the change management (CM) process.</p>
Be conditional based on the answer to another custom field question	<ul style="list-style-type: none"> ■ Select the “Make dependent on another question (optional)” check box (see “Creating Dependent Questions” on page 259).

- 7 Click **Done**.
You have created a custom field group. At the top of the page, the name of the group refreshes with the name you typed in step 4.
- 8 Go to step 2 in [“Adding Custom Field Questions to Groups” on page 243](#).

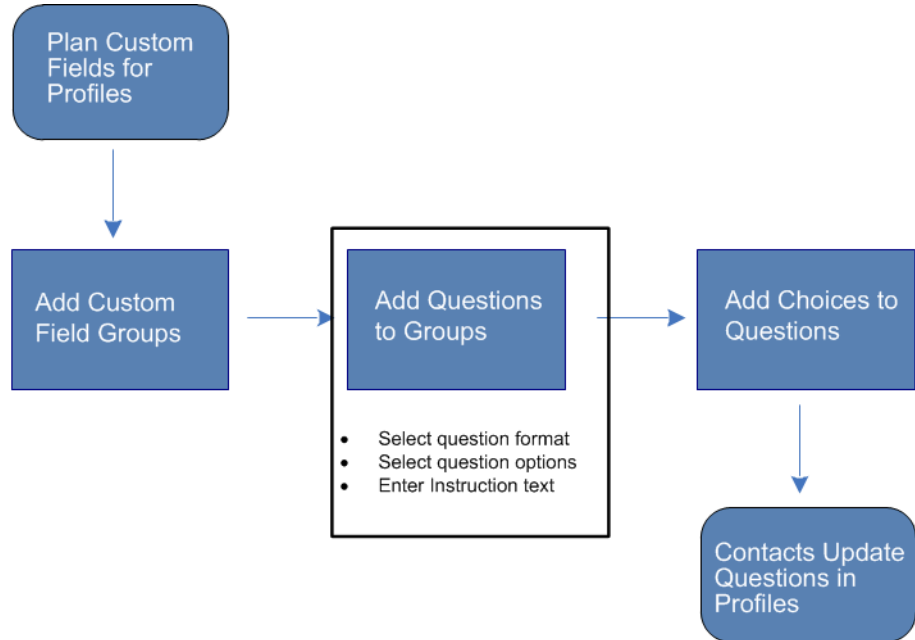
Adding Custom Field Questions to Groups

Security role: Community Administrator

Security permissions required: Custom Field Permissions > Manage Custom Fields

Before you begin, be sure the custom field group to which you want to add questions has been created (see ["Adding Custom Field Groups" on page 240](#)).

Use this procedure to perform the next phase of the custom field setup process, which is to add custom field *questions* to a custom field group. As part of this procedure, you will select a format, enter any instructions, and select the options you want to apply to the question.

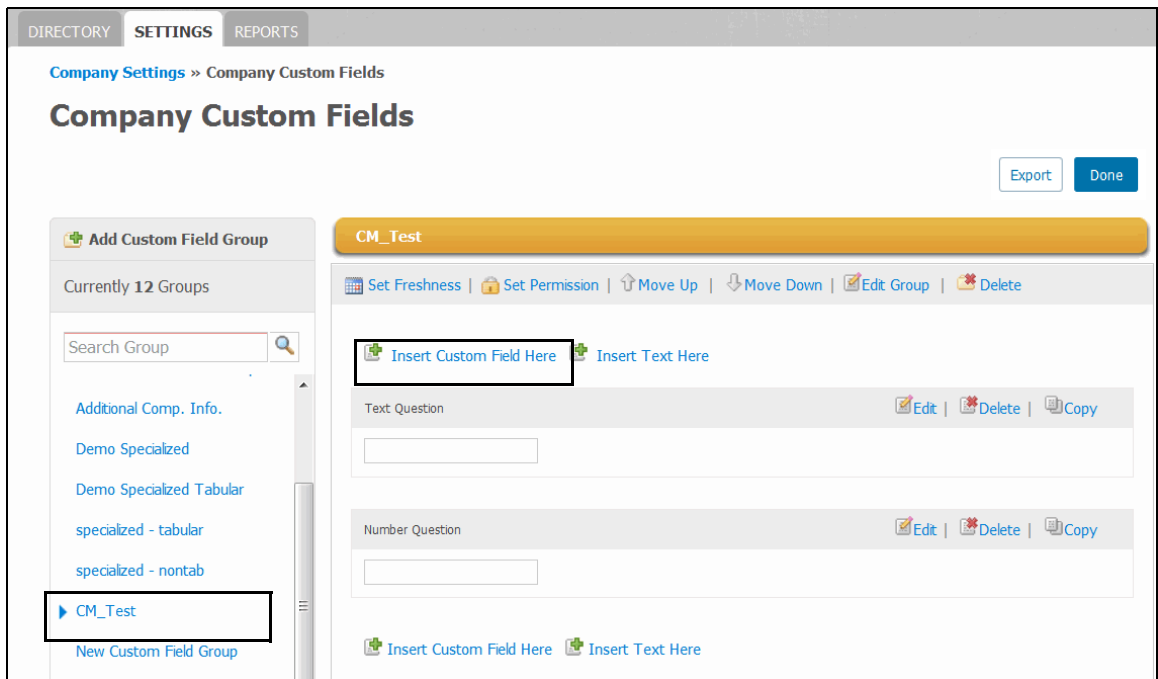


To add questions to a custom field group

- 1 Perform the appropriate action:

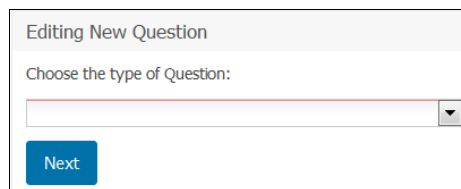
To add a question to a custom field group for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Fields.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens. Any custom field groups that have been defined, display as tabs in the first column.



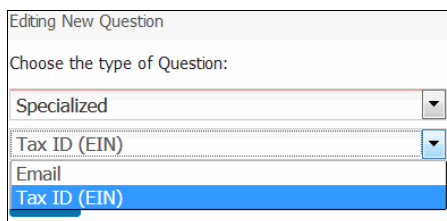
- 2 Select the tab for the custom field group to which you want to add a question.
- 3 Click **Insert Custom Field Here**.

The Editing New Question section opens at the selected location in the custom field group.



- 4 In Choose the type of Question, use the drop-down list to select the type of question you want to create, such as True/False or File Upload or Multiple Choice. For a description of all formats, see ["Custom Field Question Formats" on page 226](#).

Note: If you choose Specialized from the drop-down list, a second drop-down list displays the available options.



- 5 Click **Next**.

- 6 In Question, type the question text, such as “What is your buying area?” to replace the “New Question” text that displays automatically.


Note: If needed, use the formatting icons to emphasize any text in the question, such as making a word bold or changing the font.

The screenshot shows a web interface for editing a multiple-choice question. At the top, it says 'Insert Custom Field Here' and 'Editing Multiple Choice Question'. The 'Question:' section has a text area containing 'What is your **buying** area?' with a rich text editor toolbar above it. The 'Instructions:' section has a text area containing 'Select one option from the list.'. Below the instructions are two checked checkboxes: 'Require Answer to Custom field (Optional)' and 'Use First Value as the Default Answer (Optional)'. At the bottom, there are three buttons: 'Add Choice', 'Sort Alphabetically', and 'Import Choice'.

- 7 In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question.

Note: When a Tax ID (EIN) question is defined, text is automatically added indicating that a 9-digit value should be entered without the dash. You can add help text to include additional information.

- 8 Select the check boxes for any options you want to apply to the question.
- Important:** Not all options are available for all formats. Based on your selection, additional fields might display. The additional fields let you refine the question further.

Option	Description
Require Answer to Custom Field (Optional)	<p>Make the question mandatory.</p> <p>Selecting this option displays another option, "Mandatory based on."</p> <p>Note: The "Mandatory based on" option is only applicable to multiple answer custom fields.</p>  <p>Selecting the "Mandatory based on" check box displays additional fields and allows you to make a custom field based mandatory based on the answer to a different custom field.</p> <p>To make a custom field mandatory based on the value of another custom field:</p> <ol style="list-style-type: none"> 1 Select the Require Answer to Custom Field (Optional) check box. 2 Select the Mandatory based on check box. 3 From the Question Name drop-down list, select the custom field that the custom field question is based on. In this example, Drop List is selected. 4 From the Answer drop-down list, select the value that the custom field question is based on. In this example the value 222 is selected. <p>In this example, if the answer to the Drop List question is 222, the original question becomes mandatory and requires an answer. All other answers keep the original custom field optional.</p>
Use First Value as the Default Answer (Optional)	Specify the first value (Position 1) as the default value for the answer for questions that have more than one choice, such as Drop List, Multiple Choice, and Radio Button List.
Add Comment Field (Optional)	Allow the contact to add text comments (up to 256 characters) when answering the question.

Option	Description
<p>Add Validation Rule (Optional)</p>	<p>Specify a condition such as:</p> <ul style="list-style-type: none"> ■ "On or before today" or "On or after today" for a Date question ■ "Min Number" and "Max Number" for a Number question ■ "Only Allow Numeric Values" for a Text question ■ "Min Length" and "Max Length" for a Text question <p>If the same number is entered in both the Min Length and Max Length fields, the Append Leading Zeroes field displays. Select this if you want zeroes to be appended in front of the entered data.</p> <p>For example, if the value in the min/max length is 8 and a question is answered as 123456, Active Community adds two zeroes in front of the answer so the total number of characters equals the min/max length (in this example, 00123456).</p> <p>The Append Leading Zeroes check box can be used with or without the Only Allow Numeric Values check box; that is, you can append zeroes to both numeric and alphanumeric values.</p> <div data-bbox="794 852 1382 1087" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Add Validation Rule (Optional)</p> <p>Text must be:</p> <p>Min Length <input type="text" value="8"/> Max Length <input type="text" value="8"/></p> <p><input checked="" type="checkbox"/> Only Allow Numeric Values</p> <p><input checked="" type="checkbox"/> Append Leading Zeroes</p> </div>
<p>Make Dependent on Another Question (Optional)</p>	<p>Make a question conditional based on the answer to another question. The other question must have already been defined (see "Creating Dependent Questions" on page 259).</p>
<p>Set Default Answer (Optional)</p>	<p>Specify a default value for the answer, as follows.</p> <p>Note: Fields with default values cannot be masked.</p> <ul style="list-style-type: none"> ■ True/False—Select True or False as the default answer ■ Yes/No—Select Yes or No as the default answer ■ Text—Type the default answer ■ Number—Type the default answer ■ Dates—Select "Set Current Date" or "Select Date" and select the date from the calendar as the default answer ■ Text Area—Type the default answer (255 character limit)
<p>Enable Multiple Values (Optional)</p>	<p>Allow more than one value to be added where values are separated by a comma.</p>

Option	Description
Enable Masking (Optional)	<p>Select to hide company data, such as banking information, from those who do not have permission to view it. Masked fields cannot have default values.</p> <p>Note: Only available for Text and Number company custom fields. You are always able to see your own company’s data for custom fields provided that you have “View My Company” permission. Data is masked for custom field data for other companies unless you have “View Masked Fields” permission. See “Working with Security Roles” on page 55 for information on permissions. See “Using Auto-Fill” on page 10 to understand how the data is displayed in a company profile.</p>
Enable Tax ID Verification (Optional)	<p>Provides the ability to verify a tax ID after it is entered. Only one tax ID custom field can be enabled for verification at a time. If a different tax ID field has already been enabled, the check box is unavailable.</p> <p>Note: To take advantage of the Tax ID Verification option, it must be enabled for your community. Contact Support for assistance.</p>

9 Click **Done**.

You have added a custom field question to a custom field group.

Note: If a custom field question is required, an asterisk displays by the question. If a custom field question is dependent on another custom field or is mandatory based on another custom field, the details are displayed for the field.

10 Go to step **3** in [“Adding Choices to Custom Field Questions by Format” on page 248](#).

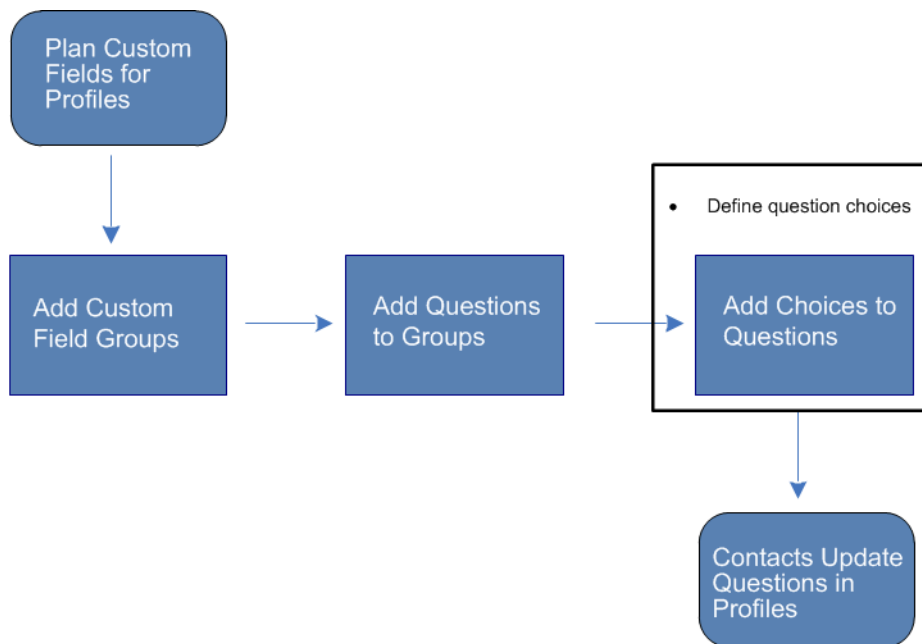
Adding Choices to Custom Field Questions by Format

Security role: Community Administrator

Security permissions required: Custom Field Permissions > Manage Custom Fields

The final phase in creating custom fields is to define the *choices* you want users to use when they respond to custom field questions. Users select the choices when answering questions while updating a profile.

Use this procedure to add choices to a custom field question in a custom field group.



Note: In addition, use this procedure to create choices for question formats that are shared by custom fields and web forms. For web form-unique question formats, see ["Adding Question Choices for Web Form Formats"](#) on page 363.

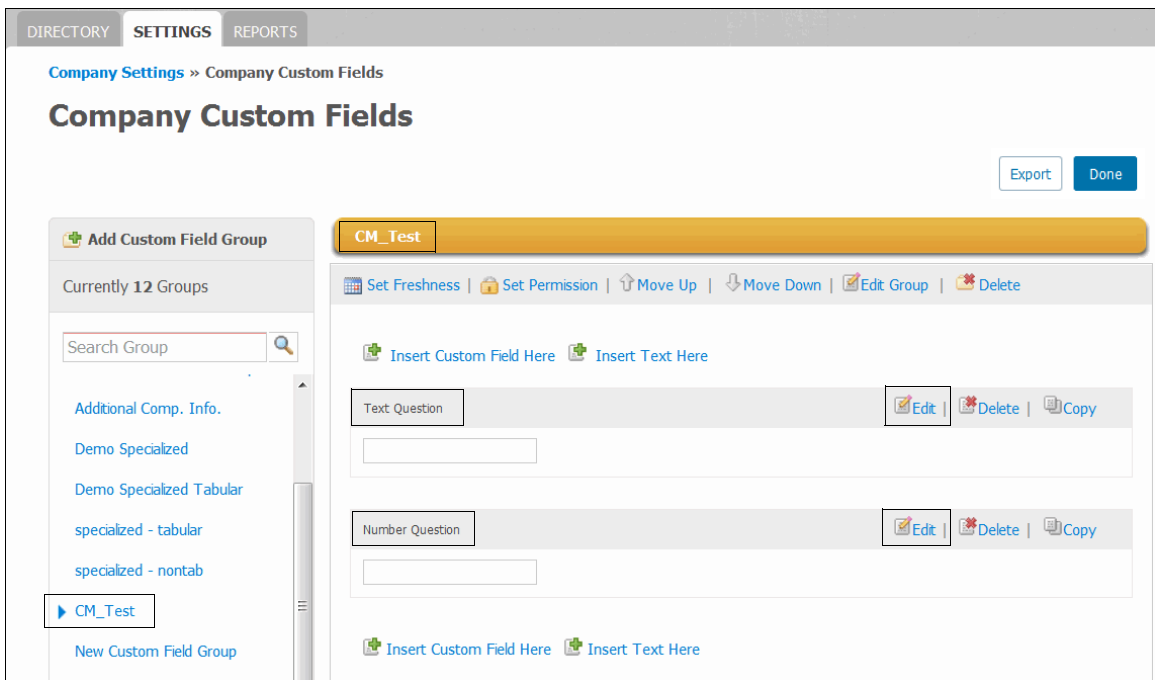
See also ["Adding Formula Custom Field Questions"](#) on page 253 and ["Importing Custom Field Values Using a CSV File"](#) on page 257.

To add choices to custom field questions manually

1 Perform the appropriate action:

To add choice to a custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens. Any custom field groups that have been defined, display as tabs in the first column.



- 2 Select the tab for the custom field group to which you want to add choices. The custom field questions in the group display.
- 3 Find the question to which you want to add choices, and then click **Edit** for that question.

The custom field question becomes editable.

Note: The options that display depend on the format selected in step 4 in “Adding Custom Field Questions to Groups” on page 243.

- 4 Perform the appropriate action:

To add choices for these formats...	Do this:
<ul style="list-style-type: none"> ■ Drop List ■ Multiple Choice ■ Radio Button List 	<ul style="list-style-type: none"> ■ Go “To add choices to Drop List, Multiple Choice, Radio Button List questions” on page 251 OR ■ “Importing Custom Field Values Using a CSV File” on page 257
<ul style="list-style-type: none"> ■ True/False ■ Yes/No ■ Text ■ Text Area ■ Number ■ Date ■ Specialized 	<ul style="list-style-type: none"> ■ Go “To define True/False, Yes/No, Text, Text Area, Number, Date, and Specialized questions” on page 251

To add choices for these formats...	Do this:
<ul style="list-style-type: none"> ■ Display Image ■ File Download ■ File Upload 	<ul style="list-style-type: none"> ■ Go "To define Display Image, File Download, and File Upload questions" on page 252
<ul style="list-style-type: none"> ■ Company link 	<ul style="list-style-type: none"> ■ Go "To define Company Link questions" on page 252
<ul style="list-style-type: none"> ■ Number Formula ■ Date Formula ■ Text Formula ■ True/False Formula 	<ul style="list-style-type: none"> ■ Go to "Adding Formula Custom Field Questions" on page 253

To add choices to Drop List, Multiple Choice, Radio Button List questions

- 1 At the bottom of the Editing Drop List, Multiple Choice, or Radio Button List Question page, click **Add Choice**.
- 2 Type the Label and Identifier information in the table.

Position	Label	Identifier
1	Marketing services#	Marketing_services
2	Corporate Services	Corporate_Services
3	IT	IT

Note: Because values for these formats can be imported, you must understand how the Label and Identifier columns are used. That is,

- Identifier column choices are used only when importing data.
- Label column choices display in profiles as answer options for users. Labels are also used when exporting results out of Active Community.

Important: Follow these guidelines for *identifiers* in .csv files. Do not add choices that have duplicate Identifiers. Do not add choices with Identifiers that contain special characters, such as '\$%^&()' or spaces. Do not use blank spaces in an Identifier unless you want them to be automatically converted to underscore (_) characters. Also, special characters will be automatically removed when you click **Add Choice** or **Done**. For example, A%^&***\$#Z followed by a blank space would be converted to AZ_.

- 3 To add more choices to the question, click **Add Choice**.
- 4 To sort custom fields alphabetically, click **Sort Alphabetically**.
- 5 To delete a custom field choice, click the icon for the row.
- 6 Click **Done**.

To define True/False, Yes/No, Text, Text Area, Number, Date, and Specialized questions

- 1 On the Editing True/False, Yes/No, Text, Text Area, Number, Date or Specialized Question page, in Question, type the question over "New Question."

- 2 In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question.

Note: When a Tax ID (EIN) question is defined, text is automatically added indicating that a 9-digit value should be entered without the dash. You can add help text to include additional information.

- 3 Select any check box options you want to apply (see ["Custom Field Options" on page 235](#)).

Note: If you want to use a Text or Number custom field to populate the Company ID, you cannot have the Enable Masking, Set Default Answer, or Make Dependent on Another Question options enabled.

- 4 Click **Done**.

To define Display Image, File Download, and File Upload questions

- 1 On the Editing Display Image or File Upload Question page, in Question, type the question over "New Question."

- 2 In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question.

- 3 Select any check box options you want to apply (see ["Custom Field Options" on page 235](#)).

- 4 Click the **Upload Image** or **Upload File** link.

- 5 Navigate to the image location, and select the image or file you want to upload.

- 6 Click **OK**, and then click **Done**.

Note: Instead of uploading files one at a time, you can upload many files to custom fields saved in the File Upload format. For more information, see ["Updating File Upload Custom Fields Using .Zip Files" on page 170](#).

To define Company Link questions

Note: A Company Link custom field can also be created using the Active Community API.

- 1 On the Editing Company Link Question page, in Question, type the question over "New Question." For example, Remit payment to.

- 2 Select any check box options you want to apply (see ["Custom Field Options" on page 235](#)).

- 3 Click **Done**.

The Custom Field Group page refreshes.

4 Perform the appropriate action:

To add a company link question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click the Directory tab. 2 Select a company. 3 Select Edit Company from the Manage Company drop-down list. The Edit Profile page opens.
Contacts	<ol style="list-style-type: none"> 1 Click the All Contacts tab. 2 Select a contact. 3 Select Edit Contact from the Manage Profile drop-down list. The Edit Profile page opens.

- 5 Select the tab for custom field group that contains the Company Link question format.
- 6 In the company link field, start typing a company name in the field’s text box. The list auto-populates with companies that you have view permissions for. For example, type ABC.



- 7 Select a company, and then click **Save**.
The link displays in the company or contact profile.



Important: The custom field hyperlink cannot refer to links outside of Active Community.

Adding Formula Custom Field Questions

Formulas can be created for the following custom field question formats.

- “Text Formula” on page 254
- “Number Formula” on page 254
- “Date Formula” on page 254
- “True/False Formula” on page 255

See also:

- “Using Special Characters with Formula Formats” on page 255
- “Adding Formulas to Custom Field Questions” on page 256

Text Formula

Use the Text Formula format to create custom fields that combine the values in multiple Text custom fields into one field.

For example, create two Text fields, First Name and Last Name, to capture a contact's first and last name. Use the Text Formula format to have Active Community combine the values in the First Name and Last Name fields into the Name field.

Active Community automatically populates the value in Name when contacts type values in the First Name and Last Name fields.

Note: To add spaces between the first and last names, see ["Using Special Characters with Formula Formats"](#) on page 255.

Number Formula

Use the Number Formula format to create custom fields that add or subtract the values in Number fields and places the result into one field.

For example, create two Number fields, Product Insurance and Liability Insurance. Use the Number Formula format to have Active Community total the values in the Product Insurance and Liability Insurance fields to ensure the result is within specified limits.

Active Community automatically populates the value in the Insurance field when contacts type numbers in the Product Insurance and Liability Insurance fields.

Date Formula

Use the Date Formula format to create custom fields that add or subtract a specified number of days to or from a date.

For example, create a Date format custom field, Start Date, to capture the date a contact starts a task. Use the Date Formula format to create a Completion Date field. In the Date Formula, indicate you want Active Community to add 30 days to the value in the Start Date field when it populates the Completion Date field.

Active Community automatically populates the value in Completion Date when contacts select a Start Date.

True/False Formula

Use the True/False Formula format to create custom fields that compare text strings or numbers. The result of the formula returns the results in true/false format.

Example: compare Text Fields

To compare text fields, use the True/False Formula to have Active Community compare a value in the First Name field to see if it matches a text string. The string must be in this format: "<STRING>".

Active Community puts "true" in the Compare Text field if the text value is "Mary." It puts "false" in the Compare Text field if the value is not "Mary."

Example: Compare Number Fields

To compare number fields, use the True/False Formula to have Active Community compare the numeric value in the Product Insurance field to see if it is greater than 100,000.

Active Community puts "false" in the Compare Numbers field if the number value is less than or equal to 100,000. It puts "true" in the Compare Numbers field if the value is greater than 100,000.

Using Special Characters with Formula Formats

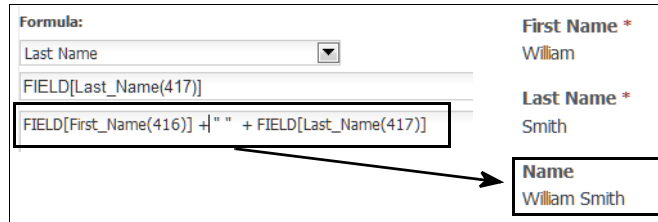
Use these special characters with the Number, Text, Date, and True/False Formula formats.

- Use basic mathematical expressions, such as >, <, >=, <=, +, -, /.
- To add spaces between fields, use a pair of double quotes with a space between each quote and a space after the last quote (" "):

Example

```
FIELD[First(473)]+" " + FIELD[Last(474)]
```

The screen shot shows the results of the sample formula. Note the space between the first and last name in the Name field.

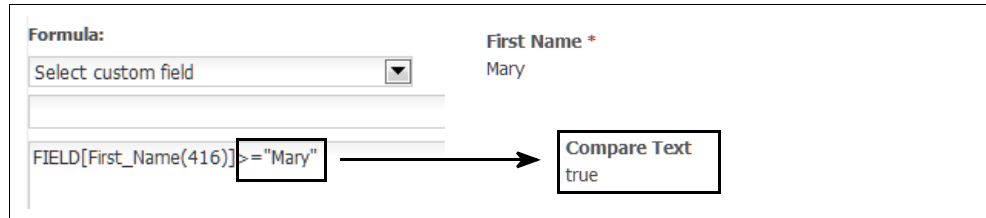


- To work with text strings, use a pair of double quotes with the text string in between them.

Example

`FIELD[First_Name(416)]>="Mary"`

The screen shot shows the results of the sample formula.



Adding Formulas to Custom Field Questions

Important: Before starting this procedure be sure to read the tips in ["Adding Formula Custom Field Questions" on page 253](#).

Use this procedure to define Number, Date, Text, and True/False formula questions for custom fields.

To add formulas for custom field questions

- 1 Perform the appropriate action:

To add formula custom field questions for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for the custom field group to which you want to add a question.
- 3 Click **Insert Custom Field Here** (Companies) or **Add Custom Field** (Contacts).

The Editing New Question section opens at the selected location in the custom field group.

- 4 In Choose the type of Question, use the drop-down list to select Number, Date, Text, or True/False Formula, then click **Next**.
- 5 In Question, type the question text over “New Question.”
- 6 In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question.
- 7 In Formula, select the custom field you want to use in the formula.
- 8 Copy the line that displays for the Formula field, and paste it into the field following the Formula drop-down list.
- 9 Type the formula you want use for the custom field.
- 10 Click **Done**.

Importing Custom Field Values Using a CSV File

Values are contacts' responses to custom field questions (see “Choices and Values” on page 237).

Before you begin, be sure:

- A custom field group has been created (“Adding Custom Field Groups” on page 240)
- One or more questions have been added to the group “Adding Custom Field Questions to Groups” on page 243, and
- A .csv file has been created using the guidelines in “Importing Companies and Contacts Using CSV Files” on page 128 and “Custom Field Requirements for Importing Data” on page 133 in Chapter 5, “Companies and Contacts”.

Important: Using this option *overwrites* values that already exist in the company or contact profile.

Use this procedure to import custom field values for any of the custom field question formats.

To import custom field values

- 1 Perform the appropriate action:

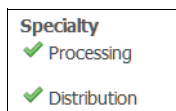
To import custom field values into Active Community for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for the custom field group to which you want to import question values, and then click **Edit Group**.
- 3 From the list, find the question to which you want to import values, and then click **Edit**.
- 4 Click **Import Choice**.



- 5 In the Import Custom Fields dialog box, click **Browse**, navigate to the .csv file you want to import, and click **Open**.
The file name populates the text box.
- 6 Click **Import**.
The custom field values are populated in the company or contact profile.
- 7 Click **Done**.
- 8 Access a profile to verify the values were imported correctly.



Before the information was imported, the check boxes were not there. Now they display in the profile.

Working with Custom Fields

These topics describe how to tailor custom field groups, questions, and choices to meet your needs.

Topics include:

- ["Finding Custom Field Groups" on page 259](#)
- ["Creating Dependent Questions" on page 259](#)
- ["Creating Questions in Data Tables" on page 262](#)
- ["Re-Sequencing Custom Field Group Tabs" on page 264](#)
- ["Re-Sequencing Custom Field Questions" on page 265](#)
- ["Defining Freshness Settings for Custom Fields" on page 266](#)
- ["Assigning Custom Field Permissions to Security Roles" on page 267](#)
- ["Adding Instruction Text" on page 267](#)
- ["Creating Help Icon Text" on page 267](#)
- ["Copying a Custom Field Question" on page 268](#)
- ["Copying Custom Fields to Web Forms" on page 269](#)
- ["Deleting a Custom Field Group" on page 269](#)
- ["Deleting a Custom Field Question" on page 270](#)

- “Configuring a Custom Field Group, Question, or Choice in a Different Language” on page 271

Finding Custom Field Groups

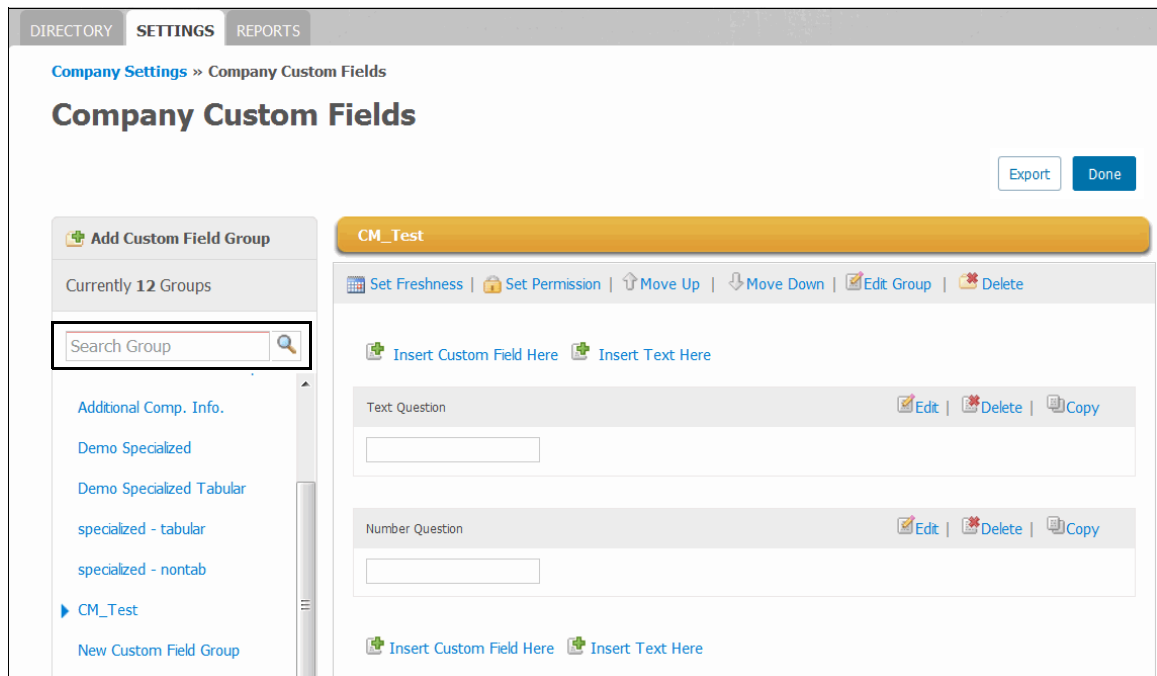
Use this procedure to search for and find custom field groups so you can work with the questions in them.

To search for custom field groups

- 1 Perform the appropriate action:

To find for custom field groups...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.



- 2 In Search Group, start typing the name of the group you want to find.
The auto-fill feature lists the groups based on the letters you type.
- 3 Select the group you want to work with.
The questions in the group display.

Creating Dependent Questions

Use this procedure to hide or display a custom field group based on a contact's answer to another custom field question.

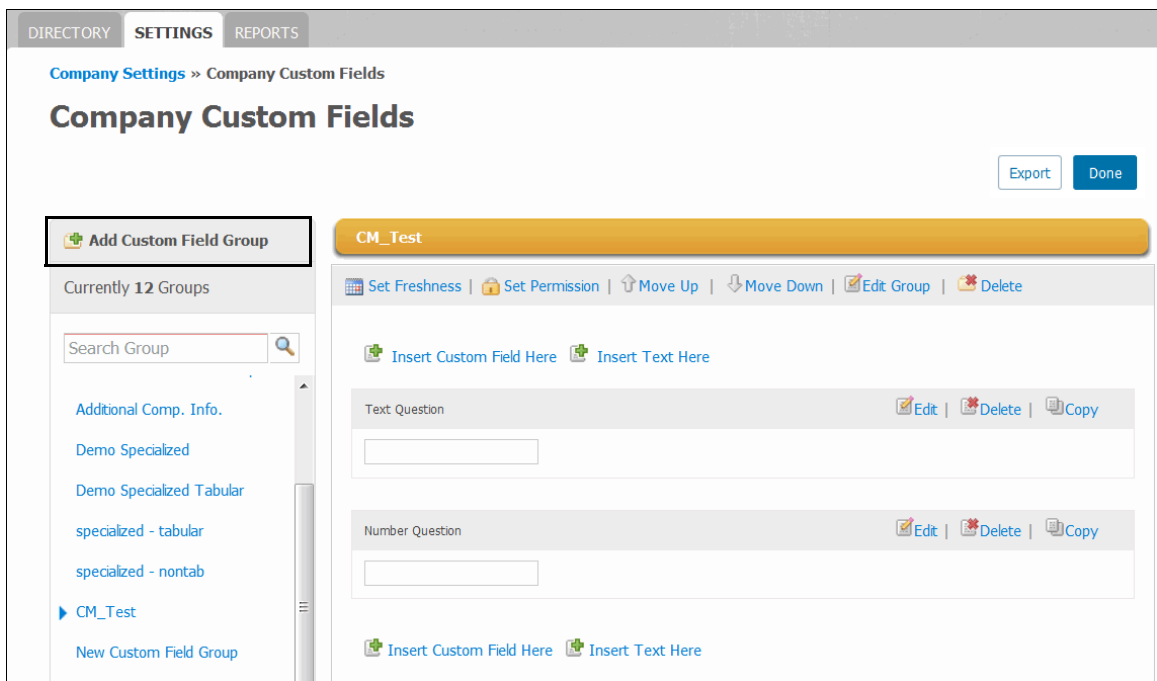
Dependent questions are defined when creating or editing a custom field group.

To create a custom field group that is dependent on an answer to a question

1 Perform the appropriate action:

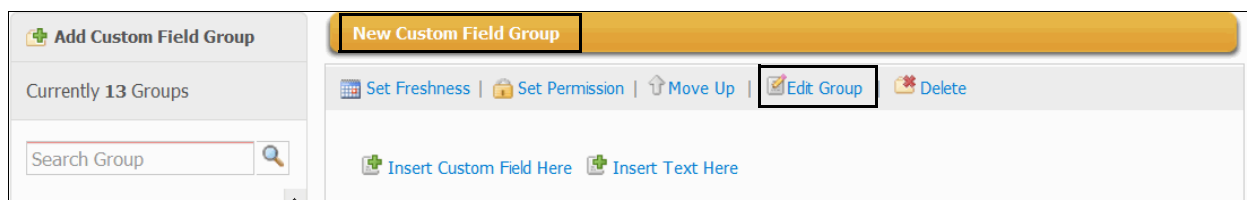
To create a dependent custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.



2 Click **Add Custom Field Group**.

The New Custom Field Group section opens. You will replace the “New Custom Field Group” name in step 4.



3 Click **Edit Group**.

The Editing Custom Field Group section opens.

- 4 In Name, type over “New Custom Field Group” and give the group a name, such as “Licensing” or “Company Ownership.”
- 5 In Description, type a general description of the custom group, such as the nature of the questions it contains.
- 6 At the bottom of the page, select the “Make Dependent on Another Question (Optional)” check box.
Additional fields display.

- 7 In Question Name, select the name of the question on which you want this question to depend, such as Specialty.
- 8 In Answer, select the answer on which you want this question to depend, such as Manufacturing.
- 9 Select the OR or AND button if you want to make the question dependent on one or more custom field choices.

Note: If AND is selected and two options are highlighted, then both options must be selected for the dependent field to display. The AND operator is generally used when the hub sets a dependent field on a multiple choice question. The OR operator can be used for all question formats.

- 10 Click **Done**.

Text that describes the dependency displays under the question.

This custom field is dependent on Specialty being Manufacturing.

In the example, Active Community displays this custom field group in a profile only if the answer to the Specialty question is Manufacturing.

Creating Questions in Data Tables

Use this procedure to display all questions in a group as column headings in a table.

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	Yes	50
2	Maryanne Brown	Yes	15
3	Elizabeth Winston	No	35

Each column heading is a custom field question. Each question can be in a different custom field format, including Drop List, Multiple Choice, True/False, Yes/No, Text, Number, Date, Text Area, File Upload, Company Link, and Specialized.

For examples, see ["Custom Field Groups as Data Tables" on page 233](#).

Data table questions are defined when creating a custom field group. They cannot be defined when editing a group.

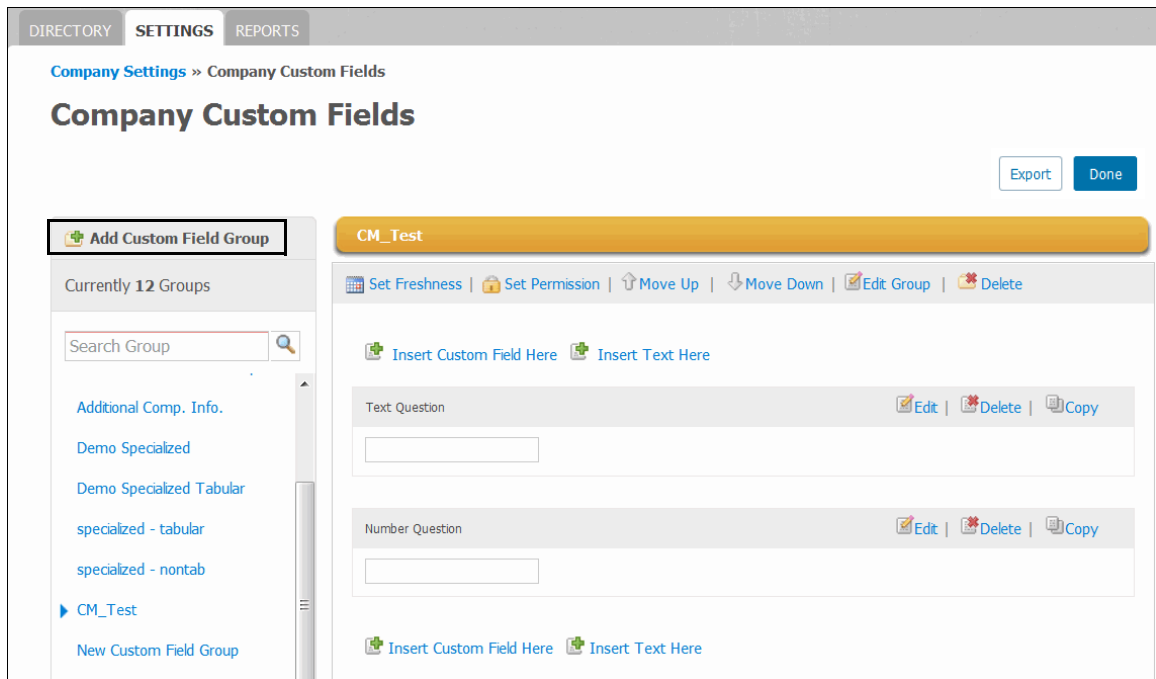
Note: Tabular fields and tabular field groups are not supported in the change management (CM) process.

To create custom field questions in a data table

- 1 Perform the appropriate action:

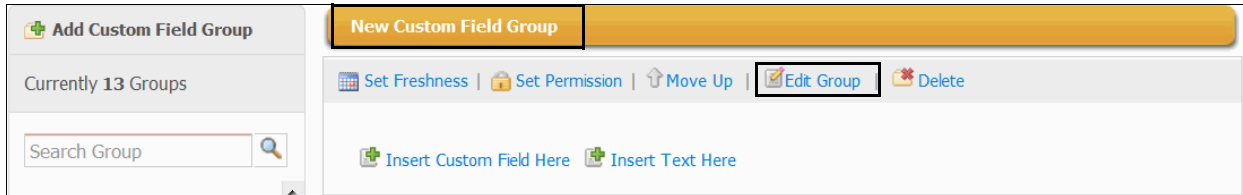
To create a custom field question in a data table for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.



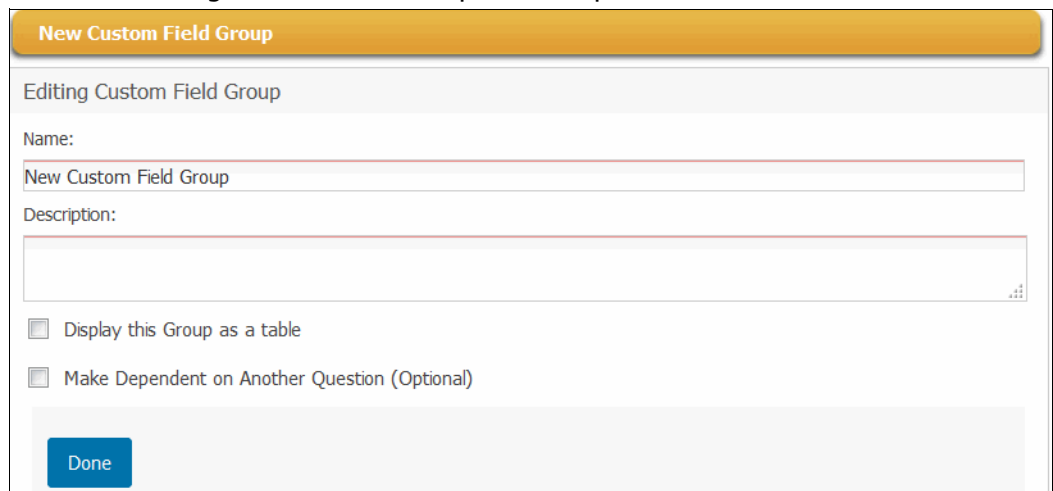
2 Click Add Custom Field Group.

The New Custom Field Group section opens. You will replace the “New Custom Field Group” name in step 4.



3 Click Edit Group.

The Editing Custom Field Group section opens.



- 4 In Name, type over “New Custom Field Group” and give the group a name, such as “Licensing” or “Company Ownership.”
- 5 In Description, type a general description of the custom group, such as the nature of the questions it contains.
- 6 At the bottom of the page, select the “Display this group as a table” box check box.

Display this Group as a table

- 7 When adding custom field questions to the group, create one custom field question for each column you want to display in the table.
- 8 Select the format that is appropriate for the column.

Important: You add questions in data tables as described in “Adding Custom Field Questions to Groups” on page 243. The table doesn’t display until contacts edit their profiles.

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	Yes	50
2	Maryanne Brown	Yes	15
3	Elizabeth Winston	No	35

- 9 Define the question, then click **Done**.

Re-Sequencing Custom Field Group Tabs

Use this procedure to change the display order of custom field group tabs.

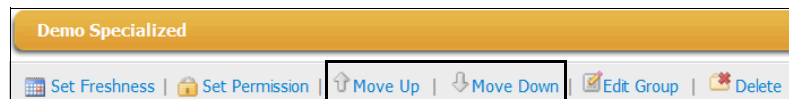
To change the sequence of custom field group tabs

- 1 Perform the appropriate action:

To re-sequence custom field group tabs for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for the custom field group you want to re-sequence.
- 3 Click **Move Up** or **Move Down** to re-sequence the order in which the tab displays on this page and in a company or contact profiles.



The tab order changes.

- 4 Click **Done**.

Re-Sequencing Custom Field Questions

Use this procedure to change the display order of custom field questions in a custom field group by dragging and dropping the questions to a new location.

To change the sequence of custom field questions

- 1 Perform the appropriate action:

To re-sequence a custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for the custom field group that includes the questions you want to re-sequence.
- 3 Select the custom field question header, hold your cursor down, and drag and drop the question to a different position in the custom field group.

The screenshot shows a list of custom field questions. The 'Date' question is at the top, followed by the 'Specialty' question. The 'Specialty' question is highlighted with a black border. Below the 'Specialty' question, there are two radio button options: 'Distribution' and 'Manufacturing'. A note below the options states: 'This custom field is dependent on Specialty being Manufacturing.'

- 4 The question sequence changes. In this example, the Specialty custom field question was moved before the Date question

The screenshot shows the same list of custom field questions, but the 'Specialty' question has been moved to the top position, above the 'Date' question. The 'Specialty' question is still highlighted with a black border. The 'Date' question is now at the bottom of the list.

- 5 Click **Done**.

Defining Freshness Settings for Custom Fields

In addition to defining freshness settings from company or contact profiles as described in "Setting Time Intervals for Profile Reminder Emails" on page 45, you can set profile freshness while working with a custom field group.

Use this procedure to define the interval of time after which Active Community will send profile update reminder emails for custom fields.

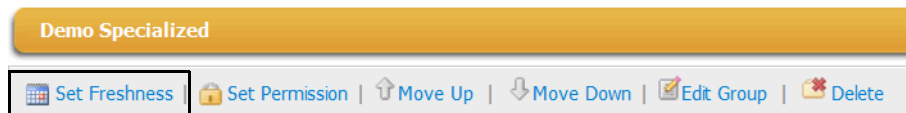
To define freshness settings for a custom field group

- 1 Perform the appropriate action:

To define freshness settings in a custom field group for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for a custom field group, and click **Set Freshness**.



The Contact (or Company) Freshness Setting page opens.

Custom Field Group Name	Interval (days)	
Contact Core Fields	45	Edit
Parent	30	Edit
Custom Fields		Edit
DE25050		Edit
rs1701		Edit
tab1		Edit

Important: The number of days set for update profile reminder emails is listed in the Interval (days) column.

- If there is a number in the field, the freshness setting is *on*. Reminder emails will be sent at the appropriate interval for that set of fields.
- If there is no number in the field, the freshness setting is *off*. No reminder email will be sent for that set of fields.

- 3 Click **Edit** for the information you want to keep current.

The Edit Freshness Settings page opens.

- 4 In Interval (days), enter the number of days after the last profile update that you want a reminder email to be sent. For example, you enter 45 in the Interval (days) field for the Contact Core Fields group. If contact core fields in a profile are not updated in 45 days, Active Community automatically sends a profile update reminder email to the profile owner.
- 5 Click **Save**.

On the Freshness Setting page, you will see the number of days you set for update reminders.

Assigning Custom Field Permissions to Security Roles

Go to [“Assigning Custom Field Group Permissions to Security Roles”](#) on page 64 in [“Roles and Permissions.”](#)

Adding Instruction Text

To add instruction text to a custom field question

- When defining a custom field, use the **Insert Text Here** link to type any special instructions, such as descriptions, titles, or general information.



The text displays in the body of the question.

Please engage with your Group Procurement Buyer before proceeding


Creating Help Icon Text

To add help icon text to a custom field question

- When defining a custom field question, use the Instruction field to type help text for a question.

Instructions:

The text displays when the contact clicks the help icon for the question.

Number of shifts per week 
Please enter the number of shifts in a given week.

Copying a Custom Field Question

Use this procedure to copy a custom field question to a new custom field group, and modify the question to create a new custom field.

Important: If you copy a question that is dependent on another custom field, the dependency information will *not* be copied.

To copy a custom field group or question

- 1 Perform the appropriate action:

To copy a custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the tab for the custom field group that contains the question you want to copy, and then click **Edit Group**.

A screenshot of a custom field question editor. The field is labeled 'Date' and has a text input box with a placeholder 'MM/DD/YYYY'. To the right of the input box are three buttons: 'Edit' (with a pencil icon), 'Delete' (with a trash icon), and 'Copy' (with a document icon).

- 3 Navigate to the custom field question you want to copy, and click **Copy** for that custom field.

The Copy Custom Fields pop-up opens.

A screenshot of a 'Copy Custom Fields' pop-up dialog. The title bar says 'Copy Custom Fields' with a close button (X). The main content area has a label 'Copy 'Date' to:' followed by a drop-down menu. The drop-down menu is currently set to 'Field Group' and shows 'Company Information' as the selected option. Below the drop-down menu is a note: 'NOTE: None of the dependencies will be copied'. At the bottom left of the dialog is a 'Copy' button.

- 4 To copy the custom field question to a specific custom field group, select the group from the Field Group drop-down list.

Note: The dependencies of the existing custom field will *not* be copied.

- 5 Click **Copy**.

The copied custom field question is added to the field group you specified.

- 6 Click **Edit**.

The fields become editable.

- 7 Modify the custom field as needed, and then click **Done**.

The new custom field question is added to the group.

Copying Custom Fields to Web Forms

You can copy a custom field group or question to a web form, then distribute the web form as a survey to contacts. After contacts complete the survey, Active Community automatically updates the company or contact profile with their responses. For details, see:

- "Creating a Web Form for Inside Your Community" on page 355
- "Adding Question Choices for Web Form Formats" on page 363
- "Copying a Web Form to Create a New One" on page 367

Deleting a Custom Field Group

Use this procedure to delete custom field groups, which deletes all questions in the group.

Important: Review these rules before deleting a custom field group:

- You cannot delete groups or questions that are dependent on other groups or questions. You must delete the dependent group or question first.
- You cannot delete a custom field group if the group is associated with a sub-community and/or a change management process.

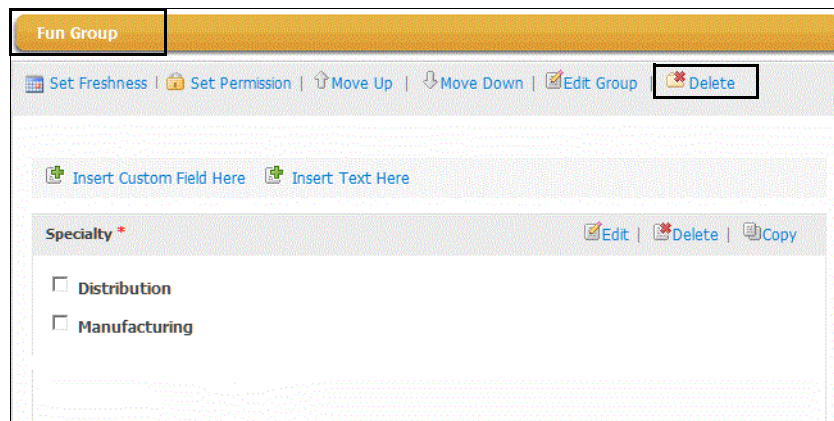
To delete a custom field group

- 1 Perform the appropriate action:

To copy a custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the custom field group you want to delete.
- 3 Click **Delete**.



The group, and all questions in it, are deleted.

Deleting a Custom Field Question

Use this procedure to delete custom field questions in a custom field group.

Important: Review these rules before deleting a custom field:

- You cannot delete groups or questions that are dependent on other groups or questions. Before starting this procedure, you must either:
 - Delete the dependent question, or
 - Edit the group or question and clear the “Make Dependent on Another Question (Optional)” check box.
- You cannot delete a custom field if it is associated with a sub-community and a change management process.

Note: If a masked company custom field question is deleted from a custom field group, the original values display on the audit log even if data masking was enabled for the field.

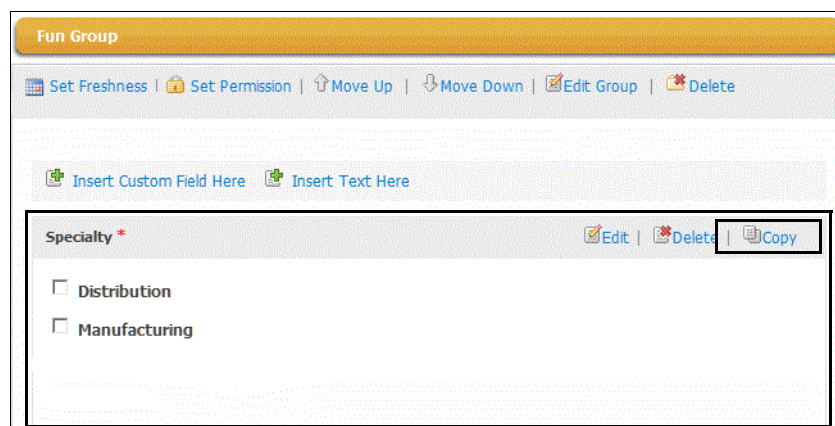
To delete a custom field question

- 1 Perform the appropriate action:

To copy a custom field question for...	Do this:
Companies	<ol style="list-style-type: none"> 1 Click Profiles > Companies. 2 Click the Settings tab. The Company Profile Settings page opens. 3 Click Custom Field.
Contacts	<ol style="list-style-type: none"> 1 Click Profiles > Contacts. 2 Click the Custom Fields tab.

The Company Custom Fields or (Contact) Custom Fields page opens.

- 2 Select the custom field group that contains the question you want to delete.
- 3 Click **Delete** for the question you want to delete.



The question is deleted from the group.

Configuring a Custom Field Group, Question, or Choice in a Different Language

Use this procedure to configure a custom field group, question, or choice in a different language (one that is supported by Active Community).

After you create a custom field group, question, or choice in your default language, you can configure it in a second (or more) language(s). Then, for example, when a user accesses Active Community in English, they see the custom field in English, and when they access Active Community in Spanish (or change the language to Spanish), they see the custom field in Spanish.

To configure a custom field in a different language

- 1 Create a custom field group, question, and choice in your default language. Save your changes. See applicable topics in ["Custom Fields" on page 221](#).
- 2 Change the Active Community language to another (supported) language (see ["Changing Your Language" on page 11](#)).
- 3 In that second language, modify the label for same custom field group, question, or choice. For example, if you changed your language to Spanish, modify the custom field group, question, or choice so that it is in Spanish. Save your changes.

You can now change your language to either of the languages where you configured the custom fields, and those fields will display in either of the two languages depending on which language you select for Active Community.

Ensuring Contacts Respond to Custom Field Questions

After creating custom field groups, questions, and choices, Active Community automatically adds them as tabs in company and contact profiles. The custom field groups and questions do not contain answers to the questions until contacts in the community *respond* to the questions by updating contact and company profiles.

There are several ways to ensure contacts keep custom field information up-to-date.

Topics include:

- ["Define Automatic Email Reminder Settings" on page 271](#)
- ["Send an Update Profile Email Message" on page 271](#)
- ["Use the Registration Module to Collect Profile Data" on page 272](#)

Define Automatic Email Reminder Settings

You can set automatic email reminders to be sent to your partners when their contact or company profile becomes stale. For details, see ["Defining Freshness Settings for Custom Fields" on page 266](#).

Send an Update Profile Email Message

You can send an email message to your community, prompting them to update their profiles. For details, see ["Adding an Activity to a Project" on page 290](#).

Use the Registration Module to Collect Profile Data

If your company uses the optional Registration module, you can collect information for any custom field group or question using the Registration approval process. After final approval, Active Community creates the company and includes the collected values for the custom field.

Exporting a Custom Fields Configuration

Security role: Community Administrator

Security permissions required: Custom Field Permissions > Manage Custom Fields

Community administrators who have custom field permissions can use this procedure to export a custom fields configuration to send to OpenText support to assist in debugging and resolving issues faced by customers. All custom field-related configurations are included in the export such as dependencies, mandatory requirements, multi-language translations, etc.

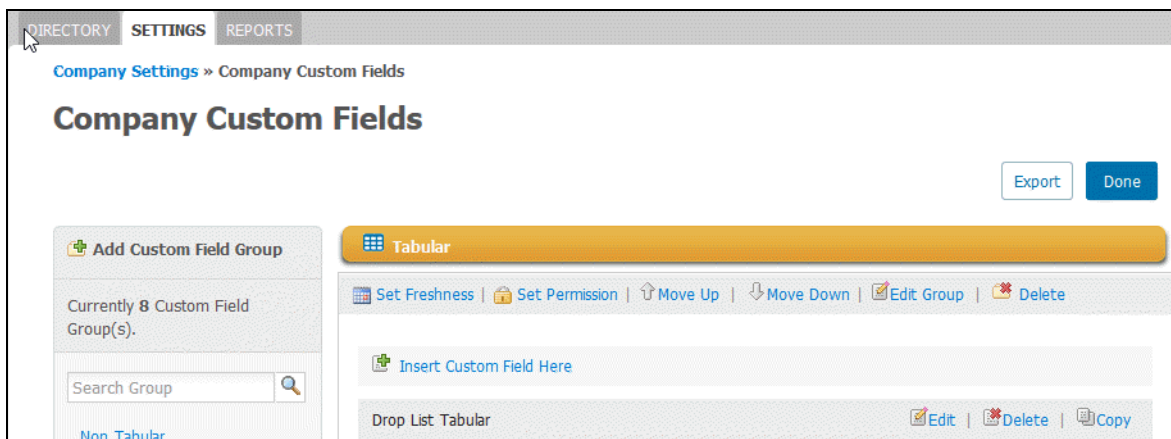
Note: Only the custom fields configuration is exported; no data is exported.

An exported custom fields configuration can also be used by OpenText administrators for internal use. The following conditions apply:

- Import of the exported custom field configuration can only be performed by OpenText and is for internal use only.
- The professional services team must submit a request to the development team to import the custom field configuration into a hub.
- The exported custom field configuration can be imported only to a new hub, one that does not yet have an existing custom fields configuration.

To export a custom fields configuration

- 1 Click **Profiles > Companies**.
- 2 Click the **Settings** tab.
The Company Profile Settings page opens.
- 3 Click **Custom Fields**.
The Company Custom Fields page opens.



4 Click **Export**.

A dialog box asks if you want to open or save the file. The configuration file opens or is saved.

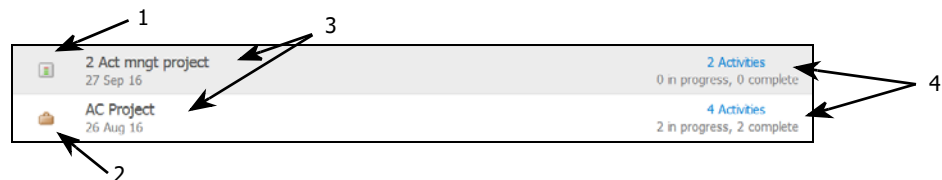
Projects and Activities

8

You use *projects* to communicate or collaborate with your business contacts, partners, vendors, or suppliers. A project consists of one or more activities which represent actions you want community members to perform. Sample activities might be to:

- Send a satisfaction survey to a specific group of your suppliers, or
- Inform all your trading partners about new policy changes.

In the user interface, a project is a workspace that helps you organize and track all the components of its activities. Whenever you create an activity, it becomes part of the project's archives.



The parts of a page:

Key	Description
1	Indicates activity managed project
2	Indicates regular project
3	List of projects
4	Number of activities in each project

Note: Depending on your user permissions, you may not be able to create a project directly; you may need to contact your Community Administrator to do so.

Topics include:

- ["Project Overview" on page 276](#)
- ["Creating a Regular or Activity Managed Project" on page 287](#)
- ["Adding an Activity to a Project" on page 290](#)
- ["Defining Activity Dependencies and Due Dates" on page 297](#)
- ["Adding Participants to an Existing Activity" on page 299](#)
- ["Adding Team Members to a Project" on page 301](#)
- ["Editing Project Settings" on page 303](#)
- ["Editing Activity Settings" on page 303](#)
- ["Starting a Regular Project" on page 305](#)

- "Starting an Activity Managed Project" on page 306
- "Copying a Project to Create a New One" on page 309
- "Copying an Activity to Create a New One" on page 310
- "Suspending or Activating Activity Participants" on page 312
- "Suspending or Restarting an Activity" on page 314
- "Customizing Upcoming and Overdue Reminder Messages" on page 315
- "Customizing a Project Kickoff Message" on page 318

Project Overview

You can define two types of projects:

- Use *regular projects* for ongoing projects, such as updating your community directory.
- Use *activity managed projects* for campaigns that have:
 - Fixed start and end dates
 - Include steps that need to be completed in order. You can assign due dates and dependencies to each activity, so that if one step is incomplete, the remaining steps won't start.

For example, you might have a project to communicate with suppliers, as shown in the following graphic.



The parts of a project:

Key	Description
1	Activity: Send Email to Suppliers
2	Activity: Suppliers Acknowledge Email
3	Activity: Send File to Suppliers

Topics include:

- "Activity Managed Projects" on page 277
- "Project Tabs" on page 279
- "Activity Tabs" on page 281
- "Email Messages" on page 282
- "Project Phases" on page 285
- "Project Planning" on page 285

- “How Do I?” on page 286

Activity Managed Projects

Activity managed projects contain activities with start and end dates. They can include prerequisite activities to ensure activities are completed in the proper sequence.

By enabling activity management for a project, you can:

- Schedule a project to automatically start in the future
- Have one activity automatically start after another activity has been completed
- Automatically send activity reminder email messages to participants. Emails are sent to a participant’s Communication Email.

When you are creating an activity managed project, you specify options that customize the project to your needs. The options apply to *all* activities in the project.

For example, you might have a project that has three activities that must be completed in order:

- 1 Send Email to Suppliers
- 2 Suppliers Acknowledge Email
- 3 Send File to Suppliers



Key	Description
1	Activity: Send Email to Suppliers
2	Activity: Suppliers Acknowledge Email
3	Activity: Send File to Suppliers

If you make activity 2 dependent on activity 1, the setting ensures activity 2 does not start until after activity 1 is completed.

Activities

An *activity* is any item that can be completed within a regular or activity managed project, such as:

- Send a survey to suppliers
- Issue a letter to the entire community
- Update a business contact's profile

An activity can be assigned to one or more contacts in your community, and can be added to regular projects and activity managed projects.

The screen shots emphasize the differences between activities for regular projects and activities for activity managed projects.

Regular Projects

Regular projects are ongoing, with no start or end dates. There is *no* Dependencies and Due Dates link.

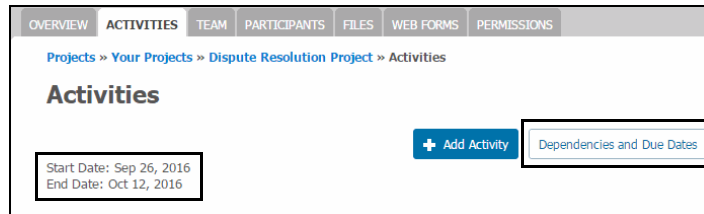


Activities for regular projects display as shown:

3 Activities						
View by: Status Type Name Created Date						
Completed	02 Sep 16	?	21	100%	1 Completed 1 Assigned	Reopen
Started	02 Sep 16	?	Wenform activity	33%	1 Completed 3 Assigned	Suspend
Started	02 Sep 16	?	act 11	0%	0 Completed 3 Assigned	Suspend

Activity Managed Projects

Note the start and end dates associated with activity managed projects and the existence of the Dependencies and Due Dates link.



Activities for activity managed projects display as shown:

2 Activities						
View by: Status Type Name Created Date						
A - Interview supervisors		?		Depends on B	Due Oct 12, 2016	0 Completed 1 Assigned
B - Send email to supervisors		?		No Dependencies	Due Oct 12, 2016	0 Completed 1 Assigned

Activity Participants

After starting an activity, Active Community sends communications to the activity participants, which are the trading partners you selected to receive the survey or email message. For example:

- In a *regular* project, if you create an activity to send an email reminder to all participants to update their profile, the email is sent when you click **Start** in the activity.

- In an *activity managed project*, the activity is started when the project is started, or when the previous activity is complete.

Important: After an activity is started, you can add but not remove participants from it.

Project Tabs

Each *project* includes a set of tabs that let you define and manage all data related to the *project*.



Project Tabs
■ "Overview"
■ "Activities"
<ul style="list-style-type: none"> ■ Overview ■ Participants ■ Messages ■ Files ■ Web Forms
■ "Team"
■ "Participants"
■ "Files"
■ "Web Forms"
■ "Permissions"

Overview

The Overview tab lists general information about the project, including its name, description, status, history, and summary of participants. Use it to get a high-level glimpse into its status.

1 → This project has been started and is executing.

Start Date: Jul 25, 2013 (Started)
End Date: Jul 25, 2013

Dashboard

Companies | Participants Export Status

Name	No Response	In Progress	Finished	Assigned	Progress
Dependency web form	1	0	1	2	<div style="width: 50%;"></div> 50%
Questions	1	0	0	1	<div style="width: 0%;"></div> 0%

History

- Jul-25-2013 1 person completed 'Dependency web form'.
- Jul-25-2013 'Questions' was started by Community Admin.
- Jul-25-2013 'Dependency web form' was started by Community Admin.
- Jul-25-2013 'Dependency web form' was added by Community Admin.
- Jul-22-2013 'Questions' was added by Community Admin.
- Jul-22-2013 Seher (Activity managed project) was added by Community Admin.

The key parts of a project:

Key Description

- 1 Overall project status
- 2 Project-related activities, including status
- 3 All actions performed as part of the project

Activities

The Activities tab lists all project activities and their status. You can add and modify activities, monitor responses and results, and set dependencies and due dates (activity managed projects only). See ["Activity Tabs" on page 281](#).

Team

The Team tab lists project team members, which are people in your community who assist the project owner in creating and maintaining the project.

Participants

The Participants tab lists the participants in the project, including the project owner and team members. Participants are the contacts in Active Community who will receive all activity communications, such as email messages and surveys.

Files

The Files tab includes all files that have been uploaded as part of web form activities in the project. If files are attached to email messages, you can find those attachments in the Messages tab of each activity.

Web Forms

The Web Forms tab includes all web forms created in the project. A web form must be published before it can be used in activities.

Permissions

The Permissions tab lists the project rights, or privileges, for each security role (such as Participant, Team Member, or Project Owner) in the project. If you change the permissions in this tab, the change only applies only to this project, not all projects.

Activity Tabs

Within a project, each activity includes tabs to let you manage all data related to the *activity*.

OVERVIEW PARTICIPANTS MESSAGES FILES WEB FORMS

Project Activity Tabs

- Overview
- Activities
 - "Overview"
 - "Participant"
 - "Messages"
 - "Files"
 - "Web Forms"
- Team
- Participants
- Files
- Web Forms
- Permissions

Overview

The Overview tab lists general information about the activity, including name, description, status, start date, and other summary information.

Participant

The Participant tab lists all participants in the activity. Participants are contacts in Active Community that will receive all activity communications, such as email messages and surveys.

Messages

Displayed only for activity managed projects, the Messages tab contains the project kickoff message and any file that was attached to an email message. You

can edit this message before the project has started. For details, see [“Customizing a Project Kickoff Message”](#) on page 318.

Files

The Files tab includes all files that have been uploaded as part of web form activities in the project. If files are attached to email messages, you can find those attachments in the Messages tab of each activity.

Web Forms

The Web Forms tab includes all web forms created in the project. A web form must be published before it can be used in activities.

Email Messages

You can send project kickoff emails and reminder emails as part of a project or activity. The emails, which use a standard email template, are sent to participants as part of a project. You customize the messages so they are appropriate for your community. Emails are sent to a participant’s Communication Email.

The parts of an email template are outlined here. Specific procedures provide more detailed information about how to modify the templates.

The key parts of an email template:

Key	Description
1	Insert “placeholders” for a contact’s first and last name, subject line, etc.
2	Text of the email message, which you modify for your company.
3	Add attachments to the email message

To

The To part of the email indicates the number of participants who will receive the message. Click the link to view or edit the list of recipients.

From

The From part of the email lists the email address that is displayed in the From field when the message is sent. Typically, it is the email address of the project owner or the email address specified in Project Settings when the project was created.

Date

The Date part of the email indicates the date the message was created.

Subject

The Subject part of the email describes the message's subject line. If an activity type of Send a Profile Update Reminder was selected, the Subject line is automatically filled in with "Update Your Profile." In other situations, the subject line will be blank. You can also customize the subject line using merge fields.

Available Merge Fields

The Available Merge Fields part of the email lists values found in the recipient's profile. You can select a field type of Company or Contact, and then select the respective "placeholder" field you want inserted in the email.

Example

If, in Select Field Type, you select Contact, and in Select Field you select First Name, the field %FirstName% is inserted in the message text. Active Community uses the first name in the recipient's profile (for example, "John") to replace the %FirstName% "placeholder" when the message is sent.

Insert Contact Fields

Insert Contact Fields also lists values found in the recipient's profile.

Example

When you click **First Name**, the field %FirstName% is inserted in the message text. Active Community uses the first name in the recipient's profile (for example, "John") to replace the %FirstName% "placeholder" when the message is sent.

Message Text

The body of the message, which you customize to participants by using merge fields. The message can also include attachments, such as spreadsheets or images.

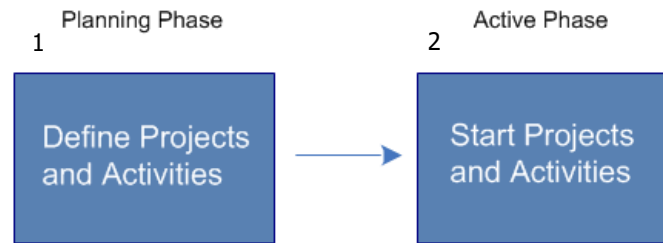
Attachments

This part of the email lets you add attachments to the message when it is sent, such as a spreadsheet or an image. The file size can be up to 50 MB.

Note: If an attachment is added to an email, it is not tracked or audited when a contact downloads it. To track when contacts download attachments, it is best to create a web form, upload the file with a File Download question, and send the form to your contact. See ["Web Forms" on page 347](#).

Project Phases

There are two phases in any project: a planning phase and an active phase.



The phases of a project:

Key	Description
1	Planning Phase - Define Projects and Activities <ul style="list-style-type: none">Changes allowed in all aspects of a project.
2	Active Phase - Start Projects and Activities <ul style="list-style-type: none">Regular projects can be changed after the project or activity has started.Activity managed projects <i>cannot</i> be changed after the project or activity has started.

- In the planning phase, you define the project and its activities. During the Planning Phase you can make changes to all aspects of a regular or activity managed project, including its participants, activities, due dates, email messages, etc.

- In the active phase, after starting the project, Active Community coordinates and orchestrates all activities related to the project. It starts the first activity and sends all project partners a project kickoff email.

Important: After a regular project has started, changes can be made to project participants, activities, etc. After an activity managed project has started, *changes cannot be made*.

Because you cannot change most aspects of an activity managed project after it has started, OpenText recommends you plan all aspects of a project carefully (see ["Project Planning" on page 285](#) and ["How Do I?" on page 286](#)).

Project Planning

These topics outline the prerequisites for projects and activities, and some of the options you need to consider when planning projects for your community.

Topics include:

- ["Project Prerequisites" on page 285](#)

- ["Activity Prerequisites" on page 286](#)

- ["How Do I?" on page 286](#)

Project Prerequisites

Before you create a project, consider the nature of your project and its activities. Is it a regular project (ongoing) or an activity managed product with start and end dates?

Depending on its scope, you may want to create multiple projects. For example, when measuring supplier satisfaction, you might create one project for conducting a supplier satisfaction survey and follow-up activities, and another project for dispute resolution.

Before you begin, be sure the project participants, such as the trading partners you want to include in the project, have contact profiles in Active Community. If they don't have profiles, you will not be able to select them for project activities (see ["Adding a Company to Active Community" on page 122](#)).

Activity Prerequisites

Before creating an activity, you must create a project.

Note: If you will be sending web form(s), you need to create it before creating the activity.

Example: Suppose you want to send a survey to a set of suppliers. After creating a project, you do the following:

- Create a web form that contains the survey questions and possible answers
- Create an activity in the project and link it to the web form
- Add suppliers as participants in the activity

How Do I?

For regular or activity managed projects you need to plan which options you will select based on the needs of the project. The table lists a few options to consider.

Note: You will choose from among these options when creating a project or activity.

If you want to...	Choose (or use) the following option:	When you are:
Create or Edit Projects		
Create a regular project	<ul style="list-style-type: none"> ■ Do not select Enable Activity Management 	<ul style="list-style-type: none"> ■ "Creating a Regular or Activity Managed Project" on page 287 OR ■ "Editing Project Settings" on page 303
Add Activities or Edit Activity Settings		

If you want to...	Choose (or use) the following option:	When you are:
Create an activity managed project; this type of project allows you to add due dates and dependencies to activities in the project	<ul style="list-style-type: none"> Select Enable Activity Management 	<ul style="list-style-type: none"> "Adding an Activity to a Project" on page 290 OR <ul style="list-style-type: none"> "Editing Activity Settings" on page 303
Allow activity due dates to adjust automatically	<ul style="list-style-type: none"> Select Automatic Rescheduling 	
Send project kickoff emails automatically	<ul style="list-style-type: none"> Select Send Project Kickoff Email 	
Send an email message to participants	<ul style="list-style-type: none"> Select Send a Message 	
Send an Update Your Profile reminder email to participants	<ul style="list-style-type: none"> Select Send a Profile Update Reminder 	
Use a different email than the default project email	<ul style="list-style-type: none"> Enter 'Reply to' and 'From' email addresses for the activity. 	
Use web forms to send email alerts	<ul style="list-style-type: none"> Select Complete a Web Form 	
Collect responses to an activity by company	<ul style="list-style-type: none"> Select Complete by Company 	
Collect responses to an activity by individual participants	<ul style="list-style-type: none"> Do not select Complete by company 	
Require participants login to complete an activity	<ul style="list-style-type: none"> Select Login Required 	
Send an email to the team when a web form is submitted	<ul style="list-style-type: none"> Select Notify team on web form submission 	"Defining Activity Dependencies and Due Dates" on page 297
Do not require a response to an activity when it is started; mark the activity as complete	<ul style="list-style-type: none"> Select No response required 	
Define activity due dates	<ul style="list-style-type: none"> Due Date field 	
Define when a reminder email is to be sent in relation to the activity's due date	<ul style="list-style-type: none"> Notification fields 	"Adding an Activity to a Project" on page 290
Define dependencies among and between activities in a project	<ul style="list-style-type: none"> Dependencies drop-down list 	
Prevent a user from re-submitting web form responses	<ul style="list-style-type: none"> Restrict re-submission 	OR <ul style="list-style-type: none"> "Editing Activity Settings" on page 303

Creating a Regular or Activity Managed Project

Use this procedure to add a regular or activity managed project. If you are adding a regular project, do not select the Enable Activity Management check box. If you are adding an activity managed project, be sure to select the check box; it allows you to add due dates and dependencies to activities in the project.

A project is a container for those activities that you want to perform to communicate and collaborate with your business contacts.

Note: A quick and easy way to create a project is to copy an existing one (see "Customizing Upcoming and Overdue Reminder Messages" on page 315).

To add a regular or activity managed project

- 1 Click the **Projects** module.
 The All Projects page opens.

- 2 Click **Add Project**.
 The Name Your Project page opens.

Important: Note this information about the Enable activity management check box:

Key	Description
-----	-------------

- | | |
|---|--|
| 1 | <p>Important:</p> <ul style="list-style-type: none"> ■ For activity managed projects, select the Enable Activity Management check box; it allows you to add due dates and dependencies to activities in the project. ■ For regular projects, <i>do not</i> select the check box. |
|---|--|

- 3 Complete the appropriate fields:
 - a In Project Name, type the name of your project. This name should correspond to the nature of the project and its activities; for example, "Supplier Satisfaction" or "Compliance with EDI 850." Required.
 - b In Description, type text that summarizes and describes the project.
 - c Under Project Settings, in Reply To Email Address, type the email address that you want shown as the Reply To address in all project email communications. If an address is not specified, the project owner's email address is used.

Example: Suppose you have a project activity that sends an email message to a group of your suppliers. When suppliers reply to your email message, you want the reply to be sent to your Accounting group, not you.

In the Reply To box, you enter your Accounting department's email address.

- d In From Email Address, type the email address that you want shown as the From address in all project email communications. If an address is not specified, the project owner's Communication Email is used.

Example: Suppose you want to show your email message as being sent from your Accounting department. In the From box, you enter your Accounting department's email address. The recipient supplier will see the email as being sent from Accounting, not you.

- e If you want to create an *activity managed* project that includes due dates and activity dependencies, select the Enable Activity Management check box. If you are creating a *regular* project, *do not* select the check box. If selected, additional fields display on the page.

Type or Select	Description
Start Date	Date the project will start, either today's date or a future date. Required. Use this format: Jan 10, 2009. You can change the date after the project has been created, but cannot change it after the project has been started.
Enable Automatic Rescheduling	Indicates if you want activity due dates to be automatically changed when the project's start date is changed, or when preceding activity due dates are changed. Example: You have two activities (1) Send File and (2) Acknowledge Receipt. Acknowledge Receipt is dependent on the Send File activity being completed. If you change the Send File activity's due date to three days later, Automatic rescheduling automatically adjusts Acknowledge Receipt's due date to three days later as well. Note: When dates are automatically changed, they will not be changed to a weekend or holiday. If that happens, the date will be moved to the next weekday.
Send Project Kickoff Email	Indicates if you want to send a project welcome message to all participants when the project is started. Emails are sent to a participant's Communication Email. The message contains a link to the participant's To Do list of activities. This option makes it easy for the participant to navigate to and complete activities throughout the project's duration. Note: If selected, you must create a project kickoff message. The message won't be sent until the project is started.

- a In Copy Team Members on All Communications, select the check box if you want to copy team members on all communications in the project.

4 Click Save Changes.

You have created a new project. You can now add activities, participants, team members, and more to the project.

5 Go to "Adding an Activity to a Project" on page 290.

Adding an Activity to a Project

An *activity* is any item that can be completed within a project. For example:

- Send a survey to suppliers
- Issue an email to the entire community.
- Prompt a set of business contacts to update their contact information



Use this procedure to:

- Create a new activity
- Select the activity type (send message, profile update reminder, or web form)
- Indicate how you want participants to respond to the activity
- Add participants to the activity
- Assign a different default 'Reply to' and 'From' email address for the activity than the default project email address
- Customize the email message that is related to the activity

Important: Be sure to complete ["Activity Prerequisites"](#) on page 286 before you begin this procedure. For example, if you plan to send a survey to your suppliers, you need to create a web form to contain the survey so you can select it as part of this procedure (see ["Creating a Web Form for Inside Your Community"](#) on page 355).

Note: A quick and easy way to create an activity is to copy an existing one (see ["Copying an Activity to Create a New One"](#) on page 310).

To add an activity to a project

- 1 After creating a project as described in ["Creating a Regular or Activity Managed Project"](#) on page 287, click the **Projects** module.
The All Projects page opens.
- 2 Find the project to which you want to add an activity. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches"](#) on page 91 or ["Advanced Searches"](#) on page 93).
- 3 Select the name of the project to which you want to add activities.
The project opens to the Overview tab.
- 4 Click the **Activities** tab.
The Activities tab opens. It lists all activities associated with the selected project.
- 5 Click **Add Activity**.

The Choose Kind of Activity page opens.

- 6 Decide which type of activity you want to add to the project.
 - Under Message Activities, if you select:
 - Send a Message, the activity will send an email message to participants. Emails are sent to a participant’s Communication Email. By default, the subject and message text are blank so you can customize the message.
 - Send a profile Update Reminder, the activity will send an email message to participants with a subject of “Update Your Profile.” Emails are sent to a participant’s Communication Email. You can customize the message text, including the contact’s first and last name, and include a link to complete the activity in Active Community (see [“Customizing Profile Reminder Messages” on page 44](#)).

Note: To associate a message activity with an alert, you need to select the Associate with Activity check box when you add or edit an alert (see Step 7 in [“Adding an Alert Configuration” on page 387](#)).
 - Under Web Form Activities, if you select:
 - Complete a Web Form, the activity will send an email message to participants with a link to a web form for recipients to complete. Emails are sent to a participant’s Communication Email.

Note: Only published web forms are available to be linked to activities. To associate a web form activity with an alert, you need to select the Associate with Activity check box when you add or edit an alert (see Step 7 in [“Adding an Alert Configuration” on page 387](#)).
- 7 Click **Choose this** for the activity type you want.

If you selected Send a message or Send a profile update reminder, the Name Your Activity page opens immediately.

Note: If you selected Complete a Web Form, select the web form you want to use, and then click **Continue** to go to the Name Your Activity page.

The key parts of an activity page:

Key Description

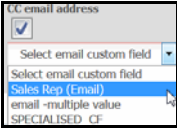
- 1 Indicates your progress in the setup wizard (for example, Step 2 of 4)
- 2 Activity Settings let you:
 - Set a different 'Reply to' and 'From' email address for the activity than the default project email
 - Collect company or individual responses
 - Require participants to log in to Active Community
 - Send an email with a link to a web form (survey)
 - Send an email and mark an activity as complete
 - Send a copy of the email to contacts who are not users of Active Community
 - Prevent a participant from changing the answers of their web form responses once they are submitted

8 Complete the fields as follows:

- a In Activity Name, type the name of the activity to be completed; for example, "Supplier Diversity Survey."

- b In Description, type a summary description about the activity, such as audience, goals, and deadlines.
- c Under Activity Settings, choose your options carefully. Some options might not be listed based on your previous selections.

Select this option...	If you want the activity to:
'Reply to' email address	<p>Type the email address that you want shown as the Reply To address in all email communications for this activity. If an address is not specified, the project email address is used.</p> <p>Example: Suppose you have several project activities, and each activity is managed by a different team in your company. Each team wants to send an email message to a group of your suppliers about a particular activity. When suppliers reply to your email message about that activity, you want the reply to be sent only to the team handling that activity.</p> <p>In the Reply To box, enter your team's email address.</p>
'From' email address	<p>Type the email address that you want shown as the From address in all email communications for this activity. If an address is not specified, the project email address is used.</p> <p>Example: Suppose you have several project activities, and each activity is managed by a different team in your company. Each team wants to show their email message as being sent from their team about a particular activity. In the From box, enter your team's email address. The recipient suppliers will see the email as being sent from the team that is handling that activity.</p>
Complete by company	<p>Collect company responses instead of individual contact responses. When any participant in the company responds, the activity will be marked as complete for the company.</p> <p>Example: You have five participants from Acme assigned to the Send Survey activity. When the first Acme participant responds, their response is recorded as the response from Acme, and the Send Survey activity is marked as complete.</p>
Login required	<p>Require participants to log in to Active Community to complete the activity.</p>

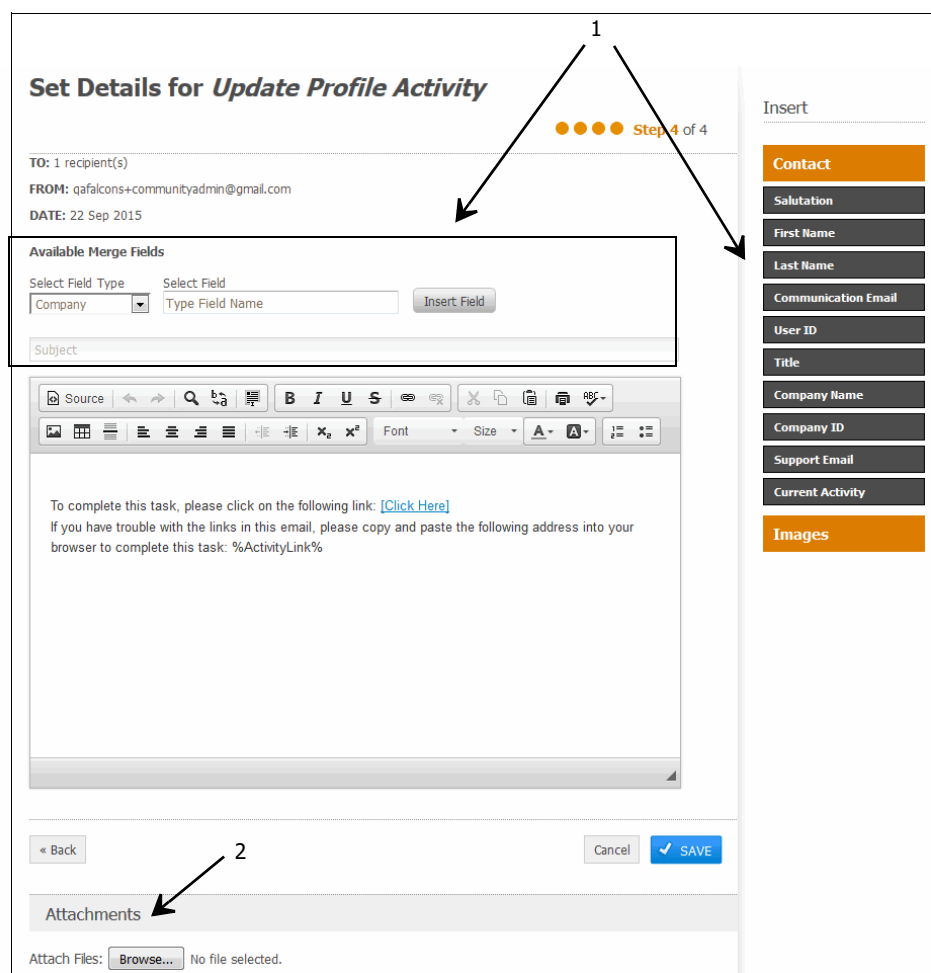
Select this option...	If you want the activity to:
Notify team on web form submission	<p>Only available if you selected Complete a Web Form as the activity type.</p> <p>Send an email notification to all team members assigned to the activity as soon as a web form is submitted. Emails are sent to a participant's Communication Email.</p> <p>The email includes the contact or company (and company ID) who submitted the web form and the date and time it was submitted, including a hyperlink to the web form.</p> <p>Example:</p> <hr/> <p>From: <test@orange.gxs.com> Date: Tuesday, April 2, 2013 9:59 AM To: <john@gxs.com> Subject: Activity Spoke Survey has been completed by Tom</p> <hr/> <p>Hi John,</p> <hr/> <p>Tom from ABrand completed ABCorp 2013's Spoke Survey activity. Click here to view the response.</p>
No response required	<p>Only available if you selected Send a Message as the activity type.</p> <p>Send the email without the activity link. As soon as the email is sent, the activity is marked as complete.</p>
CC email address	<p>Only available if you selected Send a Message or Complete a Web Form as the activity type. <i>Not</i> available if you selected Send a Profile Update Reminder as the activity type.</p> <p>Send a copy of the email to contacts who are not users of Active Community. When you select this option, a drop-down list displays.</p> <p>Select the name of the company custom field that contains the email address to which you want to send a copy of the email. The company custom field must be a Specialized (Email) custom field.</p> <p>Example: Select Sales Rep (Email).</p>  <p>Note: If you do not have permission to view a particular custom field, it does not display in the list.</p>
Restrict re-submission	Prevents a supplier from changing the answers to their web form responses once the answers have been submitted. They are still able to view their answers in a read-only format.

9 Click **Continue**.

The Add Participants page opens. Use it to add participants to the activity.

- a In the Search for Contacts field, start typing part of the name of the participant you want to add to the project, and then click **Search** (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).
 - b To add one participant, click **Add** after the name. To add more than one participant, select the check boxes for the participants you want to add to the activity, and click **OK**.
 - c Under Actions, click **Add Participants**, and then click **OK**.
 - d Confirm that you want to add the participant(s) and click **OK**.
- 10** After adding all participants, click **Continue**.

The Set Details for the activity page opens so you can customize the email message that will be sent to participants when the activity is started.



The key parts of the email page:

Key Description

- 1 The top of the page lets you insert “placeholder” fields in the subject line or message text.
- 2 The bottom of the page lets you add attachments to the message.

Important: There are two ways to customize the subject line and the text of the email message. You can type the name of any merge field in the text box for Available Mail Merge Fields, or you can use the Insert buttons to insert the merge fields quickly.

11 Under Available Merge Fields, in Select Field Type, select **Company** or **Contact**.

- a Put your cursor in the subject line or email message where you want to insert the field.
- b Use either the text box to insert merge fields or use the Insert buttons.

To use the...	Do this:
Text box	<ul style="list-style-type: none"> 1 Start typing the name of a field. The box automatically fills with field names that contain the characters you type. 2 Select a field name, and click Insert Field. The mail merge field displays in the body of the email.
Insert buttons	<ul style="list-style-type: none"> 1 Select the name of the merge field you want to insert, such as Email. 2 Click the Email button. The mail merge field displays in the body of the email.

Note: If you selected **No response required** in step 8, remove the link in the body of the email.

12 To add attachments with your message, such as a spreadsheet or an image, at the bottom of the page, click **Browse**, navigate to where the file is located on your hard drive, and then click **Open**.

The file is added to the bottom of the message. The file size must be less than 50 MB.

Note: If an attachment is added, when a contact downloads it, it is not tracked or audited. If you want to track when contacts download attachments, it is best to create a web form, upload the file with a File Download question, and send the form to your contact. For details, see [“Web Forms” on page 347](#).


13 When the message is complete, click **Save**.

Active Community saves the activity and all information about it. It saves the message related to the activity, but does not send it.

14 Go to [“Defining Activity Dependencies and Due Dates.”](#)

Merge Field Descriptions

The table describes merge fields available as buttons in email templates used in project activities. Some fields are common to all email templates; others are used only in specific templates. Not all merge fields are shown.

Click this button...	To insert this merge field in an email template:	Description
Insert 	%Salutation%	Form or address listed in the Salutation field in the participant's contact profile, such as Mr., Ms., or President.
	%FirstName%	First name of the participant; for example, "John."
	%LastName%	Last name of the participant; for example, "Smith."
	%CommunicationEmail%	Communication Email of the participant; for example, "jsmith@example.org."
	%Userid%	User ID of the participant; for example, "jsmith@example.org."
	%Title%	Title in the participant's profile; for example, "Sales Director."
	%CompanyName%	Name of the participant's company; for example, "Acme Industries."
	Current Activity	Inserts a link to the current activity, such as "To complete this task, please click on the following link: [Click Here]" with instructions to the participant about how to link to the activity to complete it. Includes two links to the activity. Important: If you have trouble with the links in this email, please copy and paste the following address into your browser to complete this task: %ActivityLink%
	%Support Email%	Inserts the email address for Active Community support.
	Dear %FirstName% %LastName%	Activity Managed projects only. Welcome message text for the project, which includes instructions to the participant about how to link to their To Do list of activities. Includes two links to the participant's To Do list. For example, "Welcome to the %ProjectName% A series of activities have been assigned to you. To access your To Do list, please click on the following link: [Click Here]" Important: If you have trouble with the links in this email, please copy and paste the following address into your browser to complete this task: %ProjectLink%"

Defining Activity Dependencies and Due Dates

In an activity managed project, you must define due dates for each activity. You have the option of specifying that project activities be completed in a sequence. To do this, you set dependencies, or prerequisite activities, that must be completed before an activity can start. Dependencies are optional. They are not needed for the first activity in a project.

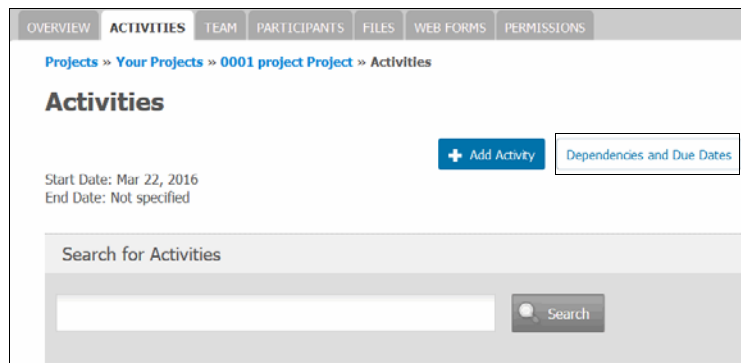
Based on an activity's due date, participants are automatically emailed a reminder when the activity is upcoming or overdue. These reminders are sent based on the

notification settings in the Dependencies and Due Dates section of the Activities tab, which is described in this procedure.

Important: While the project is still in the planning stage, you can add and edit activities. After starting a project, you cannot change it (for example, you cannot add more activities or participants or edit the project kickoff email message).

To define activity dependencies, due dates, and notifications

- 1 After "Adding an Activity to a Project," click the **Projects** module.
 The All Projects page opens.
- 2 Find the project that includes an activity for which you want define due dates and dependencies. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see "Quick (Simple) Searches" on page 91 or "Advanced Searches" on page 93).
- 3 Select the name of the project to which you want to define activity due dates and dependencies.
 The project opens to the Overview tab.
- 4 Click the **Activities** tab.
 The Activities tab opens. It lists all activities associated with the selected project.



- 5 Click **Dependencies and Due Dates**.
 The Project Activity Dependencies, Due Dates and Notifications page opens. It lists all activities that have been defined for the project.

Project Activity Dependencies, Due Dates and Notifications

Start Date: Mar 22, 2016
 Specify dependencies, due dates and notifications for activities. Please note that all activities must have due dates.

A - 0001 act	No Dependencies		<input type="checkbox"/> 1 days before	<input type="checkbox"/> 1 days after
--------------	-----------------	--	--	---------------------------------------

Save Cancel

← 1
← 2
← 3

The parts of the page:

Key	Description
1	Select an activity that must be completed before this activity can begin (define a due date or dependency).
2	Due date for the activity. Use this format: "Jan 10, 2009."
3	Indicate the number of days before or after the activity's due date that you want to send a reminder email to activity participants (up to 90 days).

6 Complete the fields as follows:

a Find the activity for which you want to define a due date or dependency.

b Use the Dependencies drop-down list to select a dependency for the activity. The dependency must be completed before the activity can start.

Example: You have two activities that need to be completed in sequence, Activity A and Activity B. To ensure Activity B starts after Activity A is complete, in the list, select Activity A as the dependency for Activity B.

c In Due Date, type the date you want the activity to be completed, such as a project start date or a future date. Use this format: "Jan 10, 2009." You can change this date later, but must change it *before* the project has started (see "[Starting an Activity Managed Project](#)" on page 306). Required.

d In Notification List, indicate if you want a reminder email message to be sent to participants *before* or *after* the activity due date (up to 90 days). For example, if you select the Days After box and type the number 1, a reminder will automatically be sent to all participants who have not responded to the activity the day *after* the activity is due.

Note: To customize the text of the reminder email, see "[Customizing Upcoming and Overdue Reminder Messages](#)" on page 315.

7 Click **Save Changes**.

A message indicates the activity dependencies and due dates were successfully updated.

Adding Participants to an Existing Activity

Activity participants are contacts in Active Community that receive all activity communications, such as email messages and surveys. Before you can start an activity, you must have added participants to it.

To add participants to an existing activity

1 After creating a project as described in "[Creating a Regular or Activity Managed Project](#)" on page 287, click the **Projects** module.

The All Projects page opens.

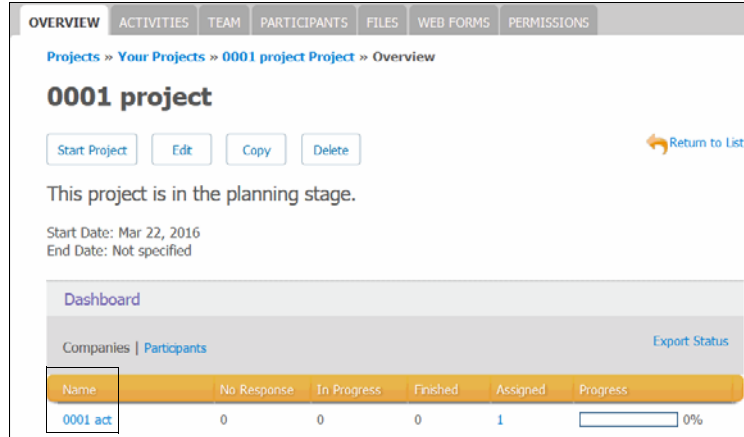
2 Find the project to which you want to add participants. You have several options:

- If you created the project, click the **Your Projects** tab.

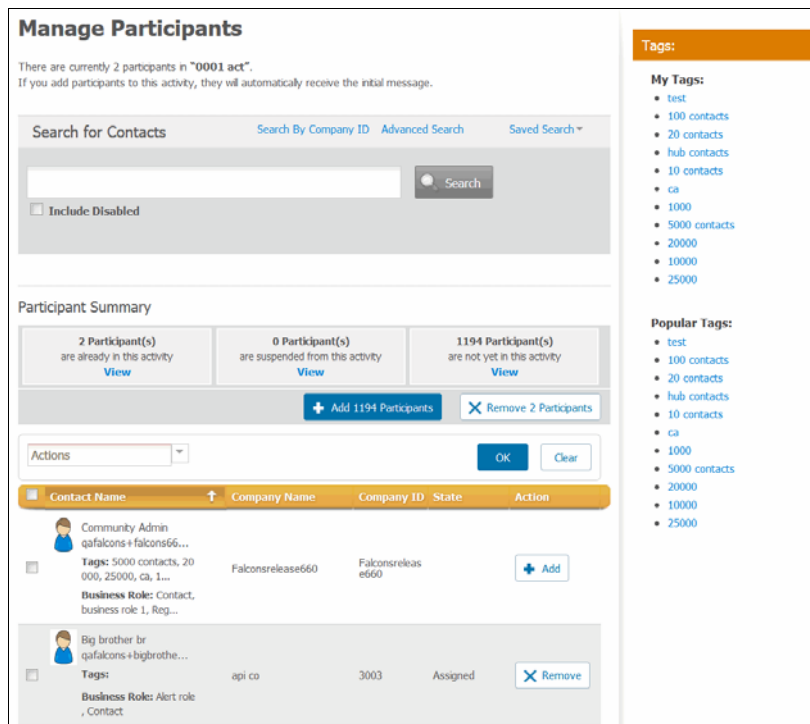
- If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and

then click **Search** (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).

- 3 Select the name of the project in which you want to add participants. The project opens to the Overview tab.

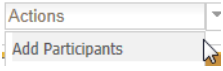


- 4 In the Name column, select the activity to which you want to add participants. The Activity page opens to the Overview tab.
- 5 Click the **Participants** tab.
- 6 Click **Manage Participants**. The Manage Participants page opens



- 7 Search for the people you want to add to the activity (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).

8 Perform the appropriate action:

If you want to add...	Do this:
One participant	<ol style="list-style-type: none"> 1 Click Add for a participant's name. A confirmation dialog opens and asks if you want to add the participant to the activity. 2 Click OK. The participant is added.
Multiple participants	<ol style="list-style-type: none"> 1 Select the check boxes for the participants you want to add. 2 In the Actions drop-down list, select Add Participants, and then click OK.  3 Click OK. The participants are added. <p>A confirmation dialog opens and asks if you want to add the participants to the activity.</p>
All participants	<ol style="list-style-type: none"> 1 In the Participant Summary section, click Add number of Participants, where number of is the number of participants not yet in the activity. A confirmation message opens. 2 Click OK. The participants are added. <p>Note: Because the list can span over multiple pages;, you might not see all of the contacts on one page.</p>

In the Participant Summary section, the "Number of participant(s) are already in this activity" are increased.

Adding Team Members to a Project

A *team member* is a person in your company who assists the project owner in maintaining the project. For example, you may want a team member to:

- Monitor survey responses in the project
- Re-send email messages to trading partners
- Create activities and surveys

Typically, team members are fellow employees who can help in fostering communication with your suppliers or business contacts.

Note: A team member can perform most of the actions as a project owner, such as creating a survey and starting an activity. Team members cannot delete a project or reopen an activity (see "Editing Permissions for Community Security Roles" on page 56).

To add team members in an existing project

1 After creating a project as described in "Creating a Regular or Activity Managed Project" on page 287, click the **Projects** module.

The All Projects page opens.

2 Find the project to which you want to add team members. You have several options:

- If you created the project, click the **Your Projects** tab.
- If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search**.

3 Select the name of the project to which you want to add team members.

The project page opens to the Overview tab.

4 Click the **Team** tab.

The Project Team Members page opens.

Note: You can search for the additional team members by using Quick or Advance search (see "Quick (Simple) Searches" on page 91 or "Advanced Searches" on page 93).

5 Click **Manage Team Members**.

The Team Members page opens.

Projects » Your Projects » 1 Msg project Project » Team Members

Team Members

Done Managing Team Members

There are currently 5 Team Members in "1 Msg project".

Search for Contacts Advanced Search

Showing 1-10 of 17

	Contact Name	Business Role	Company...	Company ID
<input type="button" value="X Remove"/>	Community Admin qafalcons+falcons660@gmail.com Tags: 5000 contacts, 20000, 25000, ca...	Contact, business role 1, RegistrationRole, TestRole	Falconsrelease660	Falconsrelease660
<input type="button" value="X Remove"/>	First cnt232 qafalcons+first11128@gmail.com Tags: hub contacts	Alert role, Hub contacts BR, Contact	Falconsrelease660	Falconsrelease660
<input type="button" value="+ Add"/>	New cnt99 qafalcons+newcnt28@gmail.com	Contact	Falconsrelease660	Falconsrelease660

Note: Only employees in your company can be team members. Team members cannot be vendors or suppliers or external contacts.

6 Click **Add** for the contact you want to add.

Note: If you want to add all of the available team members, click **Add *number of* Team Members** where *number of* is the number of available team members not yet added. To remove all of the team members, click **Remove *number of* Team Members** where *number of* is the number of team members already in the project.

7 When you have finished selecting team members, click **Done Managing Team Members**.

The team members will now receive the same communications as the project owner.

Editing Project Settings

Use this procedure to change *project* settings, including:

- To/from email addresses
- Enable or disable activity management for a project:
 - Start date
 - Enable automatic rescheduling
 - Send project kickoff email
- Copy team members on all communications

To edit project settings

- 1 After “[Creating a Regular or Activity Managed Project](#),” click the **Projects** module. The All Projects page opens.
- 2 Find the project that you want to edit. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see “[Quick \(Simple\) Searches](#)” on page 91 or “[Advanced Searches](#)” on page 93).
- 3 Select the name of the project you want to edit. The project opens to the Overview tab.
- 4 Click **Edit**. The Edit Project page opens.
- 5 Change the project settings as appropriate, and then click **Save Changes**. A message indicates you have successfully modified the project’s settings.

Editing Activity Settings

Use this procedure to change *activity* settings within a project, including:

- Activity type:

- Send an email
- Send a profile update reminder
- Complete a web form
- Activity settings:
 - Set a different 'Reply to' and 'From' email address for the activity than the default project email
 - Collect company or individual level responses
 - Require participants to log in to Active Community
 - Send an email with a link to a web form (survey)
 - Send an email and mark an activity as complete
 - Send a copy of the email to contacts who are not users of Active Community

To edit activity settings

- 1** After ["Adding an Activity to a Project"](#) on page 290, click the **Projects** module. The All Projects page opens.
- 2** Find the project that includes the activities you want to edit. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches"](#) on page 91 or ["Advanced Searches"](#) on page 93).
- 3** Select the name of the project that contains the activities you want to edit. The project opens to the Overview tab.
- 4** Click the **Activities** tab, and then select the activity you want to edit. The activity opens to the Overview tab.
- 5** Click **Edit**. The Edit Activity page opens.
- 6** Change the activity settings as appropriate, and then click **Save**. You have modified the activity's settings.

Starting a Regular Project

A regular project, or one that is ongoing, must have at least one activity and one participant before it can be started.

3 Activities						
View by: Status Type Name Created Date						
Completed	02 Sep 16	?	21	100%	1 Completed 1 Assigned	Reopen
Started	02 Sep 16	?	Wenform activity	33%	1 Completed 3 Assigned	Suspend

Important: Before starting a regular project:

Key Description

- 1 Regular projects must include at least one activity and one participant before they can be started.

To start a regular project

- 1 After creating a project as described in “Creating a Regular or Activity Managed Project” on page 287, click the **Projects** module.
The All Projects page opens.
- 2 Find the regular (ongoing) project you want to start:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).
- 3 Select the activity in the regular project you want to start.
Note: The project must have at least one activity and one participant associated with it.
- 4 Click **Start**.

3 Activities						
View by: Status Type Name Created Date						
Completed	02 Sep 16	?	21	100%	1 Completed 1 Assigned	Reopen
Started	02 Sep 16	?	Wenform activity	33%	1 Completed 3 Assigned	Suspend

A message indicates that you are about to send an email to one or more participants and asks you to confirm the action.

- 5 Click **OK**.

Active Community starts the activity based on the criteria you defined for the project. The page refreshes and shows the percentage complete for the activity.

Message Activity Activity

Suspend Edit Copy Delete

12 Apr 16 0%
Start Date

Status	Participants
No Response	1
In Progress	0
Finished	0
Assigned	1

Upcoming Notification: disabled
Overdue Notification: disabled

Messages: View 1 Message

Activity % complete: No Respondents

Message Activity

Complete

Apr 08 Apr 09 Apr 10 Apr 11 Today

Starting an Activity Managed Project

Activity managed projects can be started immediately, or they can be scheduled to automatically start at a future date.

Important: In an activity managed project, the activity is started when the project is started, or when the previous activity is complete. After starting an activity, you cannot remove participants from it.

Topics include:

- ["Starting Activity Managed Project Immediately" on page 306](#)
- ["Starting Activity Managed Projects on a Future Date" on page 307](#)

Starting Activity Managed Project Immediately

To start an activity managed project immediately

- 1 After creating a project as described in ["Creating a Regular or Activity Managed Project" on page 287](#), click the **Projects** module.
The All Projects page opens.
- 2 Find the project you want to start immediately. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#)).
- 3 Select the activity managed project you want to start.

On the project page, the **Start Project** button displays when the Start Date of the project is today's date (or earlier).

OVERVIEW | ACTIVITIES | TEAM | PARTICIPANTS | FILES | WEB FORMS | PERMISSIONS

Projects » Your Projects » 0001 project Project » Overview

0001 project

Start Project | Edit | Copy | Delete | Return to List

This project is in the planning stage.

Start Date: Mar 22, 2016
End Date: Not specified

Dashboard

Companies | Participants | Export Status

Name	No Response	In Progress	Finished	Assigned	Progress
0001 act	0	0	0	1	0%

History

Mar 22 2016

'0001 act' was added by Community Admin.
0001 project was added by Community Admin.

4 Click **Start Project**.

ADID

RETURN TO LIST | COPY | DELETE

✓ The project has been started.

This project has been started and is executing.

Start Date: Jul 19, 2013 (Started)
End Date: Jul 30, 2013

Dashboard

Companies | Participants | Export Status

Name	No Response	In Progress	Finished	Assigned	Progress
Activityone	2	0	0	2	0%

Active Community automatically starts the first activity.

Important: If Send Project Kickoff Email was selected for the project, all project participants receive the project kickoff email message that you composed as part of you creating the project (see "Creating a Regular or Activity Managed Project" on page 287). The message contains a link to the participant's To Do list of activities in Active Community.

Starting Activity Managed Projects on a Future Date

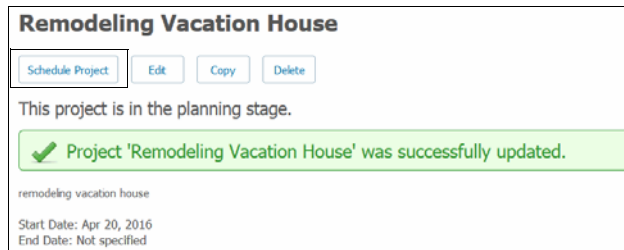
To start an activity managed project on a future date

- 1 After creating a project as described in "Creating a Regular or Activity Managed Project" on page 287, click the **Projects** module.

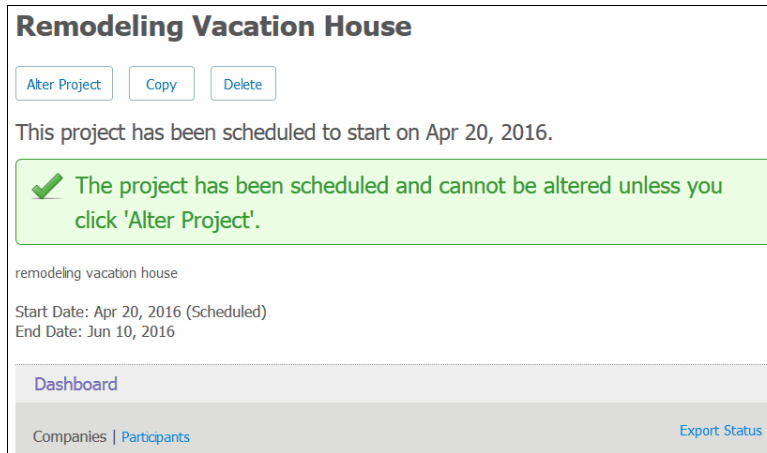
The All Projects page opens.

- 2 Find the project you want to start on a future date. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).
- 3 Select the activity managed project you want to start.

Important: On the project page, the **Schedule Project** button displays when the Start Date of the project is later than today's date.



- 4 Click **Schedule Project**.



After the project is scheduled, it will automatically start on the date shown in the project's Start Date. You do not have to manually start the project on that date.

Example: In the screen shot, Active Community will start the project and send the project kickoff email to all participants on April 20 (if the Send Project Kickoff Email option was selected for the project).

- 5 To change the start date of the project or any other information, such as add activities or edit the project kickoff email message, click **Alter Project** and then edit the project.

Copying a Project to Create a New One

Note: To copy a project, you must have View Project and Add Project permissions in Active Community (see ["Editing Permissions for Community Security Roles" on page 56](#)).

You can create a project quickly and easily by copying an existing one. When you copy a project, the following items are copied into the new project:

- Project name and description
- Activities (including activity dependencies and due dates, but *not* activity reminders if part of an activity-managed project)
- Messages
- Web forms
- Files
- Project permissions

Any activities that were currently in progress are reset, and no responses are copied to the new project.

Web forms retain their status; that is, published web forms retain their published status when the project is copied and unpublished web forms remain unpublished.

To copy a project

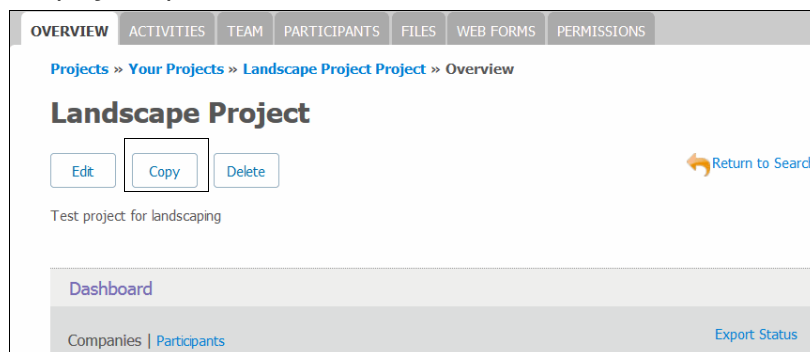
- 1 After creating a project as described in ["Creating a Regular or Activity Managed Project" on page 287](#), click the **Projects** module.

The All Projects page opens.

- 2 Find the project you want to copy. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#)).

- 3 Select the name of the project you want to copy.

The project opens to the Overview tab.



- 4 Click **Copy**.

The Create New Project tab opens.

5 Enter the new name and description for the new project.

6 Click **Copy**.

A new project is created with the new name.

Note: The new project has the same activities, participants, messages, web forms, and permissions. Activities that were in progress are reset. Activity reminders are not copied.

Name	No Response	In Progress	Finished	Assigned	Progress
order amendments ...	0	0	0	3	0%
research soil type	0	0	0	2	0%

Copying an Activity to Create a New One

Note: To copy an activity, you must have View Activities and Add Activities project permissions (see ["Editing Permissions for Community Security Roles"](#) on page 56).

You can create an activity quickly and easily by copying an existing one within the same project. When you copy an activity, the following items are copied into the new activity:

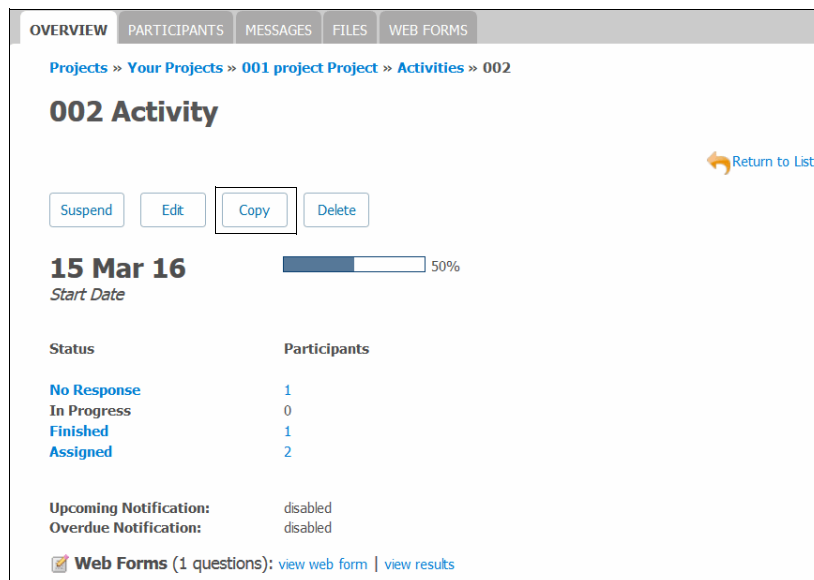
- Name and description

- Dependencies and due dates (but not activity reminders, if part of an activity-managed project)
- Participants
- Messages
- Files

You can copy an activity even if it is in-progress. When an activity is copied, the new activity will be reset and have no responses.

To copy an activity

- 1 After creating a project as described in ["Creating a Regular or Activity Managed Project" on page 287](#), click the **Projects** module.
The All Projects page opens.
- 2 Find the project from which you want to copy an activity. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#)).
- 3 Select the name of the project from which you want to copy an activity.
The project opens to the Overview tab.
- 4 Click the **Activities** tab.
The activities list page opens.
- 5 Open the activity which you want to copy.



- 6 Click **Copy**.
The Copying Activity opens to the Overview tab.
- 7 Enter the name and description of the new activity, and click **Copy**.

A new activity is created in the project. The new activity has the same participants, messages, files, dependencies, and due dates as the original. Activity reminders are not copied.

The screenshot shows a web interface for managing activities. At the top, there are tabs for OVERVIEW, PARTICIPANTS, MESSAGES, FILES, and WEB FORMS. Below the tabs, the breadcrumb path is: Projects » Your Projects » Academy Online Training Record - Food, Household and Health and Beauty Project » Activities » Copy of Academy Online Training Record - Food, Household and Health and Beauty. The main heading is "Copy of Academy Online Training Record - Food, Household and Health and Beauty Activity" with a "RETURN TO LIST" button. A green success message box states: "Activity 'Copy of Academy Online Training Record - Food, Household and Health and Beauty' copied successfully". Below this are buttons for Copy, Edit, Start, and Delete. The status is "Not started". A table shows the following data:

Status	Participants
No Response	469
In Progress	0
Finished	0
Assigned	469

At the bottom, it shows "Upcoming Notification: disabled" and "Overdue Notification: disabled".

Suspending or Activating Activity Participants

As a hub or activity owner, you can suspend one or more participants from an activity that is *in-progress*.

Suspended participants will not receive any communications, and they will not be able to participate in the activity. In addition, the activity link sent in the earlier communication will be disabled. If you reactivate a suspended participant, the links will be enabled again.

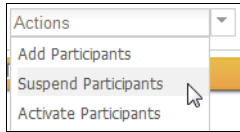
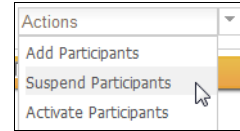
To suspend or activate activity participants for in-progress activities

- 1 After creating a project as described in "Creating a Regular or Activity Managed Project" on page 287, click the **Projects** module.
The All Projects page opens.
- 2 Find the project from which you want to suspend or activate participants. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see "Quick (Simple) Searches" on page 91 or "Advanced Searches" on page 93).

- 3 Select the name of the project from which you want to suspend or activate participants.
The project opens to the Overview tab.
- 4 Click the **Activities** tab.
The activities list page opens.
- 5 Open the activity that contains the participant you want to suspend or activate.
Important: Remember, the activity must be in-progress.
- 6 Click the **Participants** tab.
The Activity Participants page opens.
- 7 Click **Manage Participants**.
The Manage Participants page opens.
- 8 Find the participant(s) you want to suspend or activate by following the instructions in the table.

If you want to...	Do this on the Manage Participants page:															
Suspend current participants	<ul style="list-style-type: none"> ■ On the Participant Summary page, click the View link for participants who are already in this activity. <div data-bbox="758 865 1449 1192" style="border: 1px solid #ccc; padding: 5px;"> <p>Participant Summary</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">2 Participant(s) are already in this activity View</div> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">0 Participant(s) are suspended from this activity View</div> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">26 Participant(s) are not yet in this activity View</div> </div> <div style="margin-top: 5px;"> <input type="text" value="Actions"/> OK Clear </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th>Contact Name</th> <th>Company Name</th> <th>Company ID</th> <th>State</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td> Geetika Verma qafalcons+geetika@g... Tags:</td> <td>Comp B</td> <td>3</td> <td>In progress</td> <td> Suspend</td> </tr> <tr> <td> Jaya Verma qafalcons+java_ve@g...</td> <td>Comp A</td> <td>2</td> <td>In progress</td> <td> Suspend</td> </tr> </tbody> </table> </div> <p>The list of current activity participant(s) opens.</p>	Contact Name	Company Name	Company ID	State	Action	Geetika Verma qafalcons+geetika@g... Tags:	Comp B	3	In progress	Suspend	Jaya Verma qafalcons+java_ve@g...	Comp A	2	In progress	Suspend
Contact Name	Company Name	Company ID	State	Action												
Geetika Verma qafalcons+geetika@g... Tags:	Comp B	3	In progress	Suspend												
Jaya Verma qafalcons+java_ve@g...	Comp A	2	In progress	Suspend												
Activate participants who are currently suspended	<ul style="list-style-type: none"> ■ On the Participant Summary page, click the View link for participants who are suspended from this activity. <div data-bbox="758 1310 1449 1598" style="border: 1px solid #ccc; padding: 5px;"> <p>Participant Summary</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">1 Participant(s) are already in this activity View</div> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">1 Participant(s) are suspended from this activity View</div> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">26 Participant(s) are not yet in this activity View</div> </div> <div style="margin-top: 5px;"> <input type="text" value="Actions"/> OK Clear </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th>Contact Name</th> <th>Company Name</th> <th>Company ID</th> <th>State</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td> Geetika Verma qafalcons+geetika@g... Tags:</td> <td>Comp B</td> <td>3</td> <td></td> <td> Activate</td> </tr> </tbody> </table> </div> <p>The list of participant(s) who are suspended opens.</p>	Contact Name	Company Name	Company ID	State	Action	Geetika Verma qafalcons+geetika@g... Tags:	Comp B	3		Activate					
Contact Name	Company Name	Company ID	State	Action												
Geetika Verma qafalcons+geetika@g... Tags:	Comp B	3		Activate												

9 Perform the appropriate action to suspend or activate participants:

To suspend or activate...	Do this:
One participant	<ol style="list-style-type: none"> 1 Click Suspend (or Activate) for a participant's name. A confirmation dialog opens and asks if you want to suspend (or activate) the participant. 2 Click OK. In the contact list, the participant is suspended (or activated).
Multiple participants	<ol style="list-style-type: none"> 1 Select the check boxes for the participants you want to suspend (or activate). 2 In the Actions drop-down list, select Suspend Participants (or Activate Participants).  A confirmation dialog opens and asks if you want to suspend (or activate) the participant. 3 Click OK. In the contact lists, participants are suspended (or activated).
All participants	<ol style="list-style-type: none"> 1 Select the "check all" check box for Contact Name (in the header). 2 In the Actions drop-down list, select Suspend Participants (or Activate Participants).  3 Click OK. In the contact lists, participants are suspended (or activated).

On the Manage Participants page, the number of participants who "are already in this activity" and the number of participants who "are not yet in this activity" adjusts based on your selections.

Suspending or Restarting an Activity

You can suspend an activity in a regular project after it has been started. If you suspend the activity, contacts will no longer be able to access it. If you change your mind, you can restart the suspended activity.

To suspend or restart an activity in a regular project

- 1 After creating a project as described in "Creating a Regular or Activity Managed Project" on page 287, click the **Projects** module.

The All Projects page opens.

- 2 Find the regular (ongoing) project from which you want to suspend an activity:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see ["Quick \(Simple\) Searches" on page 91](#) or ["Advanced Searches" on page 93](#)).
- 3 Select the regular project you want.
- 4 Click the **Activities** tab.

The Activities page opens. It lists the status of the activities in the project.

Started 24 Feb 16		wf act	<div style="width: 33%;"></div>	33%	1 Completed 3 Assigned	Suspend
Started 26 Feb 16		msg act	<div style="width: 33%;"></div>	33%	1 Completed 3 Assigned	Suspend
Started 26 Feb 16		Copy of No response4			10 Completed 10 Assigned	Resume
Started 26 Feb 16		Message -pooja	<div style="width: 0%;"></div>	0%	0 Completed 10 Assigned	Suspend

- 5 Perform the appropriate action:

If you want to...	Do this:
Suspend the activity	<ol style="list-style-type: none"> 1 On the Activities tab, click Suspend for the activity you want to suspend. A message indicates contacts will no longer be able to access the activity. 2 To suspend the activity, click OK. Active Community suspends the activity.
Restart an activity that has been suspended	<ul style="list-style-type: none"> ■ On the Activities tab, click Resume for the activity you want to resume Active Community restarts the activity.


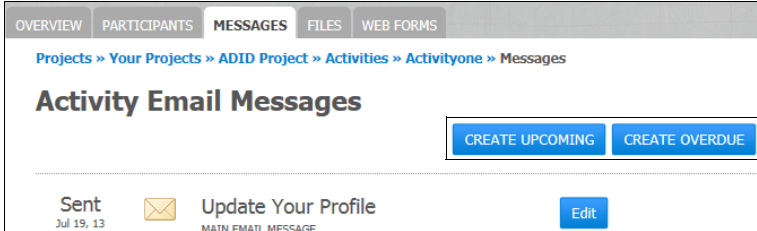
Customizing Upcoming and Overdue Reminder Messages

In an activity managed project, you can customize the upcoming and overdue reminder messages for each activity. A reminder email can be sent up to 90 days before or after an activity's due date (see ["Defining Activity Dependencies and Due Dates" on page 297](#)).

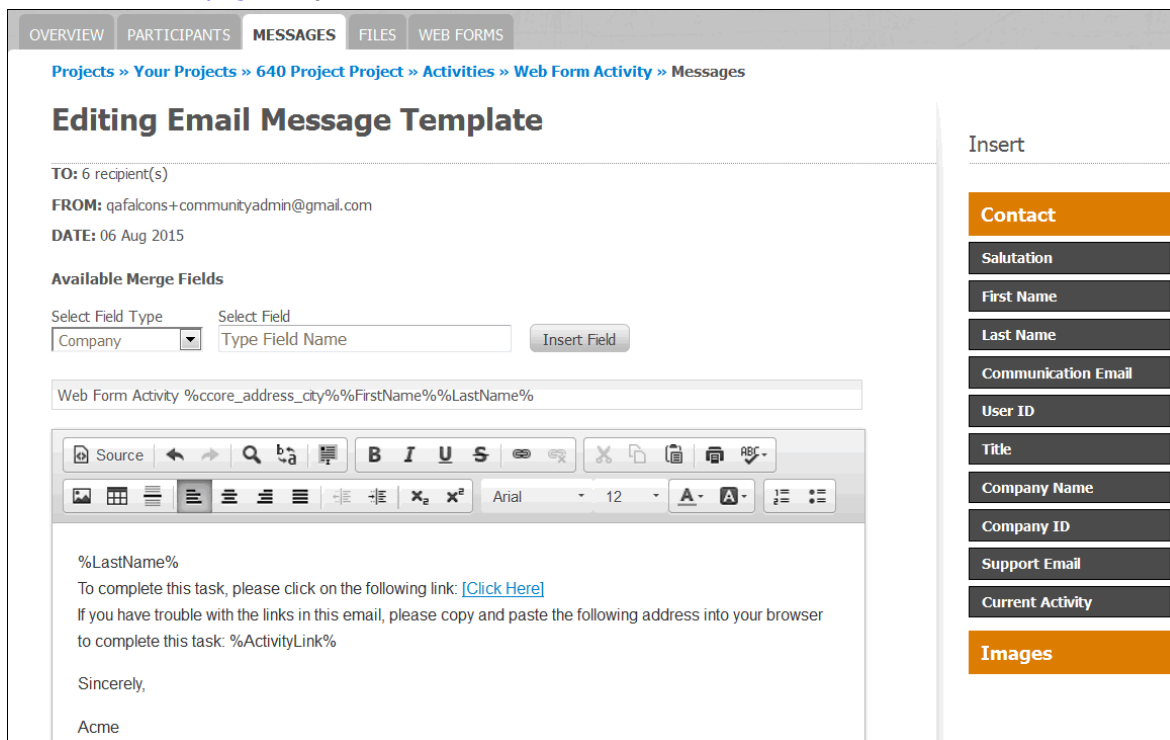
To customize upcoming or overdue reminder messages

- 1 After creating a project as described in ["Creating a Regular or Activity Managed Project" on page 287](#), click the **Projects** module.
The All Projects page opens.
- 2 Find the project from for which you want to customize the reminder message. You have several options:
 - If you created the project, click the **Your Projects** tab.

- If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see “Quick (Simple) Searches” on page 91 or “Advanced Searches” on page 93).
- 3 Select the name of the project that includes the activity for which you want to customize the reminder message.
The project opens to the Overview tab.
- 4 Click the **Activities** tab.
The activities list page opens.
- 5 Select the activity that contains reminder message.
- 6 In the activity, click the **Messages** tab.
- 7 Do one of the following:

If a message...	Do this:
Already exists	<p>Click Edit for the message you want to customize.</p> 
Does not exist	<p>Click Create Upcoming or Create Overdue.</p> 

8 Customize the text of the reminder message (see “Merge Field Descriptions” on page 297).



Important: There are two ways to customize the text of the email message. You can type the name of any merge field in the text box under Available Mail Merge Fields, or you can use the Insert buttons to insert the merge fields quickly.

9 Under Available Merge Fields, in Select Field Type, select **Company** or **Contact**.

- a** Put your cursor in the email message where you want to insert the field.
- b** Use either the text box to insert merge fields or use the Insert buttons.

To use the...	Do this:
Text box	<ol style="list-style-type: none"> 1 Start typing the name of a field. The box automatically fills with field names that contain the characters you type. 2 Select a field name, and click Insert Field. The mail merge field displays in the body of the email.
Insert buttons	<ol style="list-style-type: none"> 1 Select the name of the merge field you want to insert, such as Email. 2 Click the Email button. The mail merge field displays in the body of the email.

10 When the message is complete, click **Save** to save your changes. Your changes are saved. The email message will be sent on the notification date defined in “Defining Activity Dependencies and Due Dates” on page 297.

Customizing a Project Kickoff Message

In an activity managed project, you can customize the project kickoff message any time *before* starting the project. If the Send Project Kickoff Email option is selected in the project options, the kickoff email message is automatically sent to all project participants *after* the project is started.

To customize the project kickoff message

- 1 After creating a project as described in “[Creating a Regular or Activity Managed Project](#)” on page 287, click the **Projects** module.

The All Projects page opens.

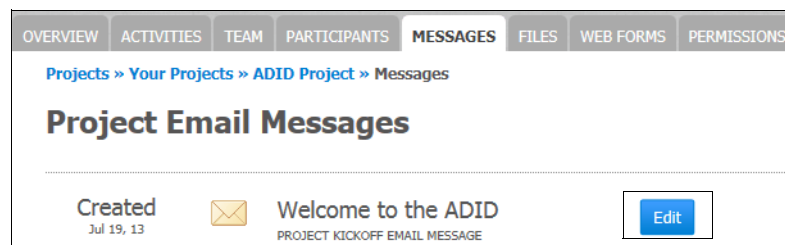
- 2 Find the project from for which you want to customize the project kickoff message. You have several options:
 - If you created the project, click the **Your Projects** tab.
 - If someone else created the project, remain on the **All Projects** tab. In the Search for Projects field, start typing part of the project name, and then click **Search** (see “[Quick \(Simple\) Searches](#)” on page 91 or “[Advanced Searches](#)” on page 93).

- 3 Select the name of the project that includes the project kickoff reminder message.

The project opens to the Overview tab.

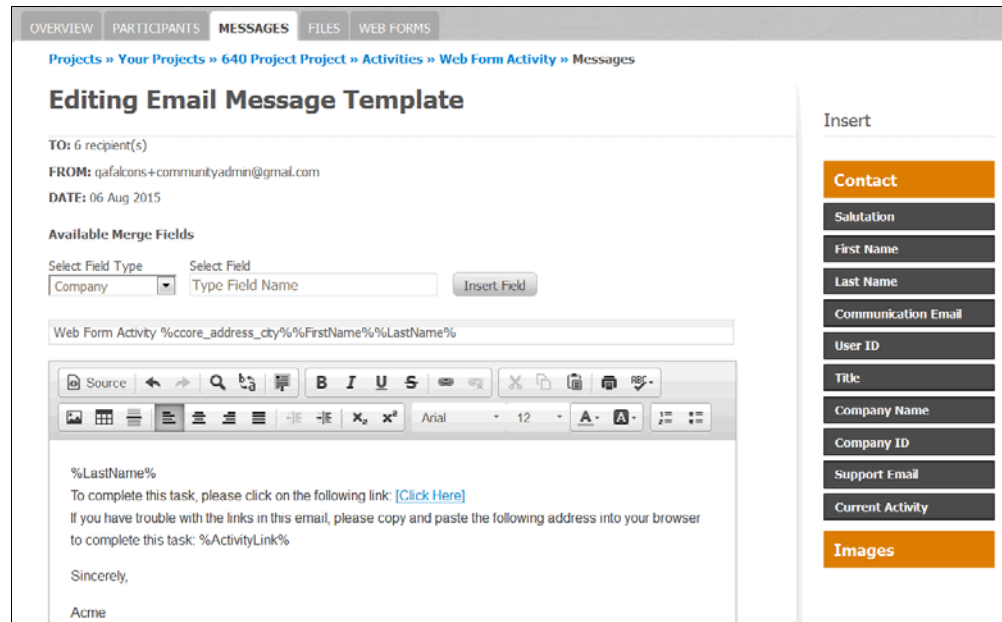
- 4 In the project, click the **Messages** tab.

The Project Email Messages page opens.



- 5 Click **Edit** for the kickoff message you want to edit.

- 6 Customize the text of the project kickoff message (see “Merge Field Descriptions” on page 297). The default message contains a link to each participant's To Do list of activities.



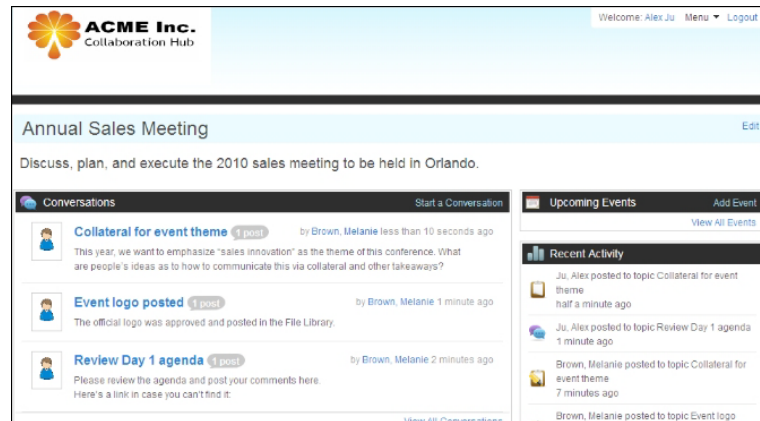
Important: There are two ways to customize the text of the email message. You can type the name of any merge field in the text box under Available Mail Merge Fields, or you can use the Insert buttons to insert the merge fields quickly.

- 7 Under Available Merge Fields, in Select Field Type, select **Company** or **Contact**.
- a Put your cursor in the email message where you want to insert the field.
 - b Use either the text box to insert merge fields or use the Insert buttons.

To use the...	Do this:
Text box	<ol style="list-style-type: none"> 1 Start typing the name of a field. The box automatically fills with field names that contain the characters you type. 2 Select a field name, and click Insert Field. The mail merge field displays in the body of the email.
Insert buttons	<ol style="list-style-type: none"> 1 Select the name of the merge field you want to insert, such as Email. 2 Click the Email button. The mail merge field displays in the body of the email.

- 8 When the message is complete, click **Save** to save your changes. Your changes are saved. The email message will only be sent when you start the project (if Send Project Kickoff is enabled in the project).

A *workspace* is a group-editable Web page where you and groups of people in your community can interact and share information.



Examples of when you might use a workspace include:

- **Feedback & Innovation**—Provide a collaborative place where buyers and suppliers can review new product capabilities, comment on their design and help influence overall product strategies.
- **RFP Responses**—Create a place where distributed teams come together to share market and competitive intelligence information on RFP's to better address prospective opportunities and improve win rates.
- **Relationship Management**—Develop an environment where the entire community comes together to resolve issues and define strategies that better service and support suppliers or end customers.

All workspaces are private and can only be seen by people who have been explicitly invited to participate in it by the workspace administrator. Your ability to view and participate in a workspace (such as reply to a conversation topic or share a file with your partners and suppliers) is controlled by permissions that you have been assigned by the workspace administrator. For details on workspace permissions, see [“Workspace Roles” on page 81](#).

Topics include:

- [“Workspace Overview” on page 322](#)
- [“Adding, Editing, and Deleting Events” on page 325](#)
- [“Setting Workspace Email Notifications” on page 330](#)
- [“Adding People to a Workspace” on page 332](#)
- [“Sharing Workspace Files” on page 335](#)

- [“Receiving Emails of Recent Workspace Changes” on page 338](#)
- [“Starting or Replying to a Conversation” on page 340](#)
- [“Switching Between Different Workspaces” on page 345](#)

Workspace Overview

The following topics describe the [“Parts of a Workspace”](#) and [“Workspace Permissions.”](#)

Parts of a Workspace

Following are descriptions of all of the items in a workspace. Keep in mind that your workspace may look differently, based on your permissions. For example, you may not see “Add Event” if you are not allowed to create events (that is, do not have Add Event workspace permission).

A workspace includes these main areas:

- [“Name and Description” on page 322](#)
- [“Conversations” on page 322](#)
- [“Upcoming Events” on page 323](#)
- [“Files and File Libraries” on page 323](#)
- [“File Library Folders” on page 323](#)
- [“Recent Activity” on page 324](#)
- [“Members” on page 324](#)
- [“Menu” on page 324](#)

Name and Description

Name of the workspace and a description (optional). The name and description usually indicate the context and scope of the workspace. For example, suppose a workspace was created for you and a major supplier to discuss product offerings for surgical bandages. The name of the workspace might be “Surgical Bandages - Product Design and Review” and the description might provide detail as to orient people to the purpose of the workspace.

The person who creates the workspace specifies the name and description; this person is known as the Workspace Administrator. The name and description can be changed by the Workspace Administrator, or any person with an Edit Workspace permission.

Conversations

Topics that workspace members have created to encourage discussion and feedback, similar to an online forum. Within a conversation, you can include links to Web sites of interest, attach documents and images, embed videos, and other media. In addition, you can leverage your workspace file library by linking to shared documents and files that are already stored in the workspace.

For details, see [“Starting or Replying to a Conversation” on page 340](#).

Upcoming Events

Meetings and important dates. For example, suppose you have a workspace devoted to planning a response to an RFP; one event might be a Gold Team Review in the conference room on Tuesday.

When you create an event, you can designate people in contact roles in your workspace (such as all COOs) to be notified of an upcoming event by email, similar to a meeting reminder message in Microsoft Outlook. For example, in a workspace devoted to Compliance, you might want all Account Managers to be reminded of an upcoming meeting to discuss supplier compliance with a purchase order policy. For details, see [“Adding, Editing, and Deleting Events” on page 325](#).

Files and File Libraries

Documents, images, spreadsheets, and other files that are shared with members of the workspace are placed in the File Library. These files can be seen by all members and can provide a central reference library for your partners and suppliers. For example, in a workspace for planning a sales event, the official logo and collateral for the event can be added to the File Library.

To facilitate reviews and participation, you can add different versions of the same file in the File Library. For example, suppose you have a PowerPoint sales presentation that you want workspace members to review. They can each revise the sales deck and add it to the File Library. The Library will show the original file and all revised files that were added by reviewers as versions in a simple collapsible view. For details, see [“Sharing Workspace Files” on page 335](#).

You can also conveniently insert a link to any file in the library in any conversation topic. For details, see [“Starting or Replying to a Conversation” on page 340](#).

File Library Folders

You can organize files within a B2B workspace library into folders. For example, within a B2B Workspaces focused on trading partner performance collaboration you might create a folder for each performance category. As you add new files to the workspace, either from the home page or the library, you simply provide the name of the folder you want the files to be placed. Note, if you want the same document to exist in two folders, you must save it to each folder location.

The screenshot shows the ACME Inc. Collaboration Hub interface. At the top left is the ACME Inc. logo and 'Collaboration Hub' text. At the top right is a user greeting: 'Welcome: Helen Rober' followed by links for 'Support', 'Help', 'Menu', 'Workspaces', and 'Logout'. Below this is a navigation bar with 'Compliance & Remediation' selected. Underneath, there's a breadcrumb 'Home > Files'. On the left, a 'Folders' sidebar shows a tree structure: 'Compliance & Remediation' (parent folder), 'Audits' (selected folder), 'Procedures', and 'Remediation Plans'. On the right, the 'Audits' folder is expanded to show a table of files:

Name	Posted By	Date	Size	
audit_report_June2010.pdf	Scott Bourdeau	05-Jun-10 at 01:56PM	3.2 KB	Delete
Factory_Audit_Report.pdf	Scott Bourdeau	05-Jun-10 at 01:56PM	951.3 KB	Delete

All files in folders can be sorted by file name, date posted, who posted and file size. Additionally, you can delete folders by simply clicking a button. Deleting a folder will prompt you to delete all the files in that folder.

Recent Activity

A summary of all of the recent changes in the workspace. For example, the Recent Activity area might show:

- People recently added to the workspace
- Replies to conversation topics, and who replied
- Files recently deleted
- Events added

Instead of having to check the Recent Activity area in the workspace, you can choose to receive email messages summarizing the recent changes. To specify when you want to receive email notifications (instantly, daily, or none at all), click Preferences on the Menu. For details, see [“Receiving Emails of Recent Workspace Changes” on page 338](#).

Members

A list of all people from your community in the workspace. Keep in mind that based on your workspace permissions, you may be only able to view or participate in certain areas of the workspace. For example, if you are only able to view content in the workspace, you may not be able to add people to the workspace. (That is usually reserved for Workspace Administrators.) For details, see [“Workspace Permissions” on page 324](#).

If you hover your mouse over each person's picture in the Members area, you can see part of their contact profile (name, email address, title). If you click their name, you can view their entire profile (provided that you have View Contacts permission).

Menu

A list of options for workspace preferences, settings, and navigation, including:

- Workspace Preferences—How often you would like to be notified of recent workspace activity by email.
- Navigation—Navigate back to your projects, your profile, or other Active Community applications.
- Workspace Settings—Configure default email notifications, set permissions for workspace members, and change the workspace logo (Workspace or Community Administrator roles).

Workspace Permissions

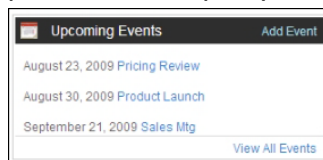
Everything in a workspace is controlled by permissions, or rights. To view or use part of the workspace, you must have explicit permission to do so, granted by the workspace administrator. For example, if you do not see a link to add an event, you do not have Edit Events permission in the workspace. For details, see [“Workspace Roles” on page 81](#).

Adding, Editing, and Deleting Events

An *event* can be a sales meeting, product review session, upcoming supplier conference, or any other important date or engagement on your schedule.

Workspace events can inform and alert your partners and suppliers of upcoming meetings and conferences in which they need to participate. For example, in a workspace devoted to planning a response to an RFP; one event might be a Gold Team Review in the conference room on Tuesday.

When you create an event, you can designate people in business roles in your workspace (such as all COOs) to be notified of an upcoming event via email, similar to a meeting reminder message in Microsoft Outlook. For example, in a workspace devoted to Compliance, you might want all Account Managers to be reminded 2 days in advance of a meeting to discuss supplier compliance with a purchase order policy.

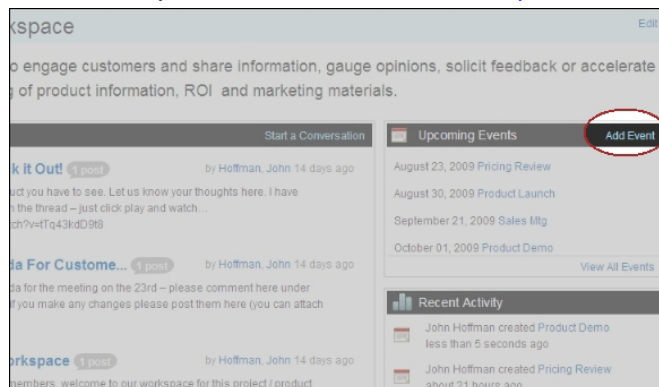


Note: To add, edit, and delete events, you must have Edit Events permission in the workspace. Typically, this is allowed for people in all workspace roles except Observer. For details, see [“Workspace Roles” on page 81](#).

To add an event

- 1 Click **Applications > Workspaces**.
- 2 On the workspace home page, click **Add Event**.

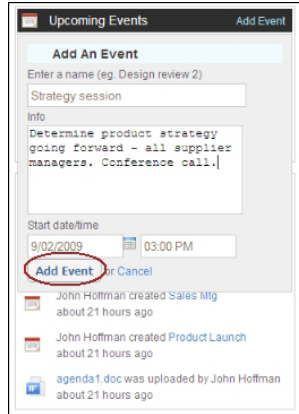
Note: If you do not see the link, then you do not have Edit Events permission in the workspace. For details, see [“Workspace Roles” on page 81](#).



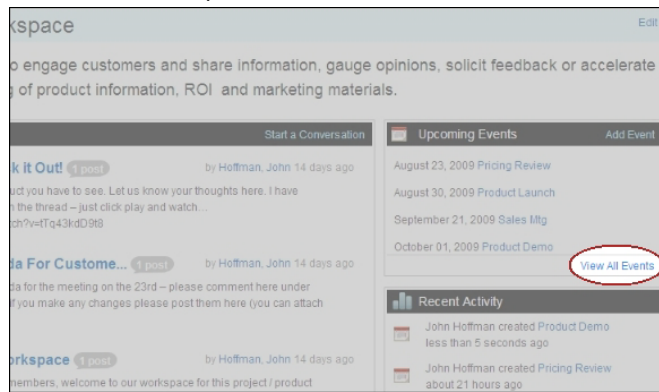
- 3 Type the name of the event (up to 60 letters) and a description (for example, the location and purpose of the meeting). Specify the starting date and time and click **Add Event**.

The event is added to the event list in your workspace. You can skip the rest of this procedure.

Note: If you want to specify an end date and time, or remind people by email that the event is approaching, then skip to Step 3 to add an event. If you've already added an event, you can edit it.

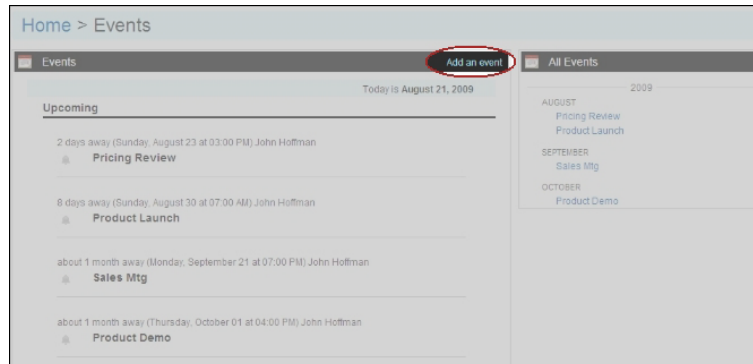


4 To add an event, click **View All Events.**



5 Click **Add Event.**

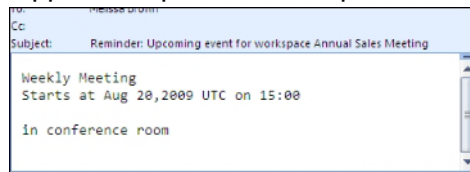
Note: If you do not see the link, then you do not have Edit Events permission in the workspace. For details, see ["Workspace Roles"](#) on page 81.



- 6 Type the name of the event (up to 60 letters) and a description (for example, the location and purpose of the meeting). Specify the starting and ending date and time. Keep in mind that you cannot specify a date or time in the past.

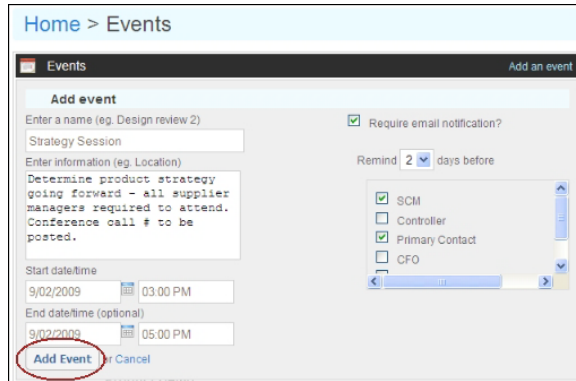
- 7 If you want to designate people in business roles in your workspace (such as all COOs) to be reminded of the upcoming event by email, click **Require email notification**.

The email notification is similar to a meeting reminder message in Microsoft Outlook. For example, in a workspace devoted to Compliance, you might want all Account Managers to be reminded 2 days in advance of a meeting to discuss supplier compliance with a purchase order policy.

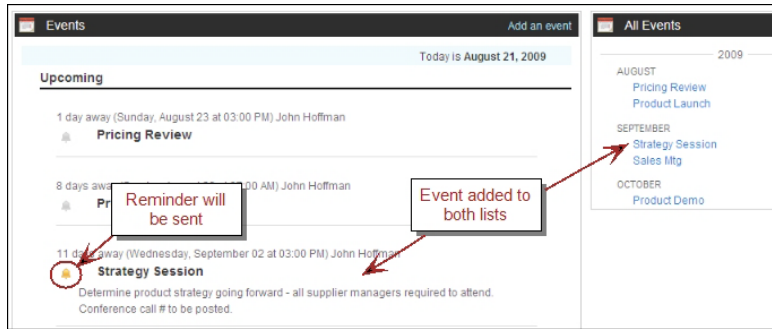


- To specify *where* the email is sent—Select the number of days before the Start Date that an email reminder will be sent. Only one reminder will be sent per event. For example, if you select 2 days before, and the Start Date is 10/31, then the email will be sent on 10/29.
- To specify *who* receives the email—From the scrolling list, select the business roles that represent the people you want to alert to the upcoming event. For example, if a meeting requires Supply Managers and Primary Contacts to attend, you might select those roles from this list. Only people in the workspace with those business roles will receive the email; those outside your workspace will not.

8 Click Add Event.



The event is added to the summary and detailed event lists on the page. The bell icon indicates that an email reminder will be sent to alert people of the upcoming event.

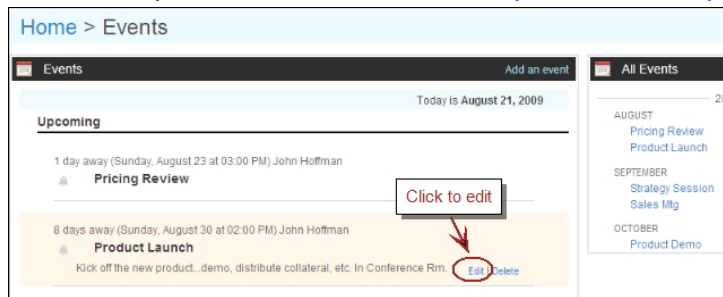


To edit an event

Note: You cannot edit events that occur in the past. For example, if today is October 20, you cannot change an event that occurred on October 18.

- 1** Click **Applications > Workspaces**.
- 2** On the workspace home page, open an event.
- 3** On the Events page, hover your mouse over the title of the event. Click **Edit**.

Note: If you do not see the link, then you do not have Edit Events permission in the workspace. For details, see ["Workspace Roles" on page 81](#).



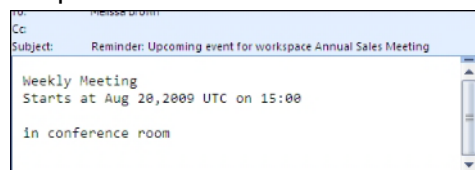
- 4** If desired, change the name of the event (up to 60 letters) and the description (for example, the location and purpose of the meeting). Specify the starting

and ending date and time. Keep in mind that you cannot specify a date or time in the past.

- 5 If you want to designate people in business roles in your workspace (such as all COOs) to be reminded of the upcoming event by email, click **Require email notification**.

This email notification is similar to a meeting reminder message in Microsoft Outlook. For example, in a workspace devoted to Compliance, you might want all Account Managers to be reminded 2 days in advance of a meeting to discuss supplier compliance with a purchase order policy.

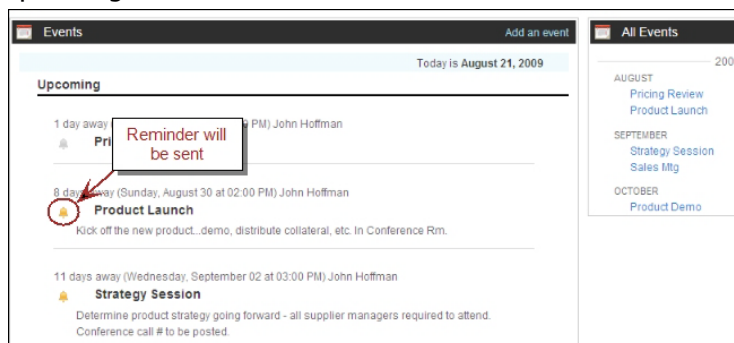
Sample Email



- To specify WHEN the email is sent... Select the number of days before the Start Date that an email reminder will be sent. Only one reminder will be sent per event. For example, if you select 2 days before, and the Start Date is 10/31, then the email will be sent on 10/29.
- To specify WHO receives the email... From the scrolling list, select the business roles that represent the people you want to alert to the upcoming event. For example, if a meeting requires Supply Managers and Primary Contacts to attend, you might select those roles from this list. Only people in the workspace with those business roles will receive the email; those outside your workspace will not

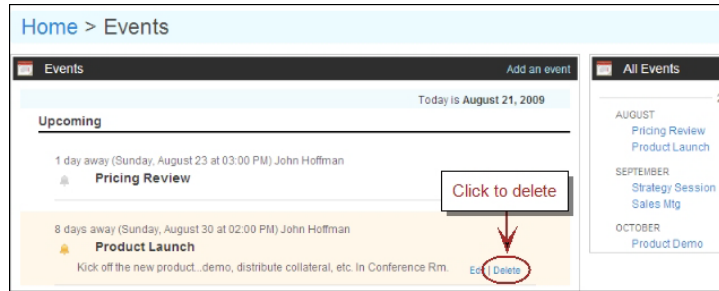
- 6 Click **Update Event**.

The event is updated in the summary and detailed event lists on the page. The bell icon indicates that an email reminder will be sent to alert people of the upcoming event.

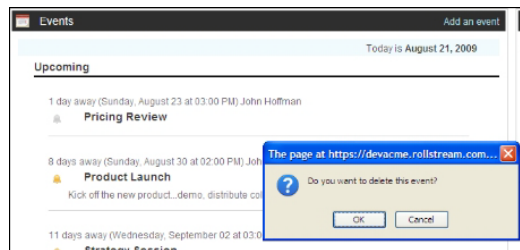


To delete an event

- 1 Click **Applications > Workspaces**.
 - 1 On the workspace home page, open an event.
 - 2 On the Events page, hover your mouse over the title of the event. Click **Delete**.
- Note:** If you do not see the link, then you do not have Edit Events permission in the workspace. For details, see “Workspace Roles” on page 81.



- 3 Confirm that you want to delete the event and click **OK**.

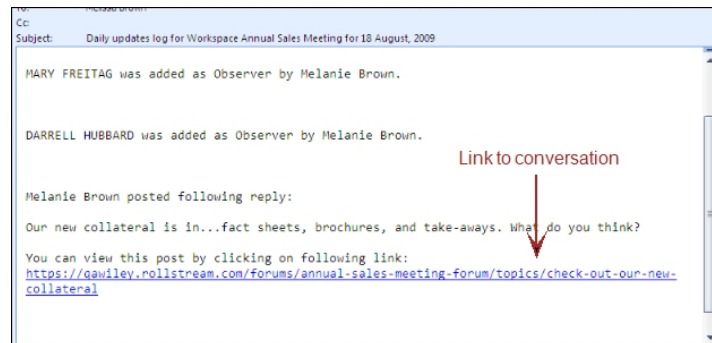


The event is removed from the Events list. Keep in mind that event reminder emails may have already been sent, if you specified them to be sent days before the Start Date.

Setting Workspace Email Notifications

As a Workspace Administrator, you can keep everyone in the workspace “in the loop” and informed about recent changes by sending automatic email alerts that show workspace activity. You can send emails instantly (every time a change occurs in the workspace) or daily (a summary of the day's activity). Or, you can specify that you don't want members to receive any email. You indicate this in your Workspace Settings.

Daily Notification

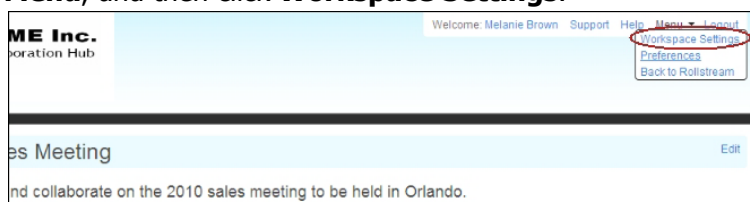


Specifying notification settings (such as Daily Notification) does not guarantee that all workspace members will receive emails; workspace members can override your notification setting by updating their Preferences. For details, see ["Receiving Emails of Recent Workspace Changes" on page 338](#).

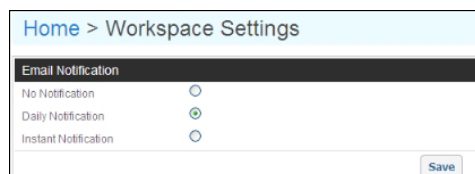
Note: Keep in mind that if you specify No Notification, you and other workspace members may still receive email reminders about upcoming events, based on their contact role in their profile. For example, someone in your workspace might create a Sales Meeting event and specify all Sales Reps to receive an email notification. If you have a contact role of Sales Rep in your profile, then you will receive an upcoming event reminder via email.

To set workspace email notifications

- 1 After clicking **Applications > Workspaces**, and opening a workspace, click **Menu**, and then click **Workspace Settings**.



- 2 On the Workspace Settings page, specify how often you want workspace members to receive notifications about workspace activity.

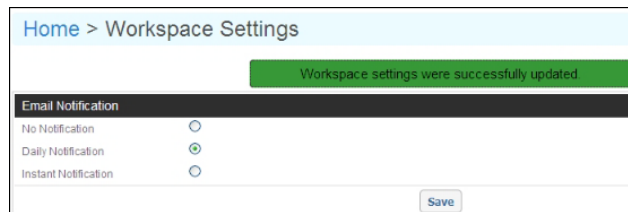


The following table describes the available options.

Click...	To...
No Notification	Not send any email about workspace activity. The exception is event reminders; depending on a person's contact role in their profile, they may receive upcoming event reminders for the workspace. This is controlled by the person who creates the event. For details, see "Adding, Editing, and Deleting Events" on page 325 .

Click...	To...
Daily Notification	<p>Send a daily email (usually in the evening) summarizing all of the changes to the workspace over the past 24 hours. The email contains:</p> <ul style="list-style-type: none"> ■ The name of the workspace ■ A list of changes, such as events added, conversations started, and people added ■ The names of the people who made the changes ■ Links to updated conversations
Instant Notification	<p>Send an email every time a change occurs in the workspace. For example, if someone is added to the workspace, members will automatically receive a single-line email notifying them of the change. Similarly, if someone replies to a conversation topic, members will receive an email with a link to the updated conversation.</p> <p>Important: Depending on the level of participation in your workspace, this setting may result in a large number of email notifications. You might consider switching to Daily Notification if the number of emails becomes overwhelming.</p>

3 Click **Save**.



Adding People to a Workspace

A workspace member is a person in your community (i.e., someone who already has a contact profile) who participates in or views your workspace. Typically, they are fellow trading partners, suppliers, customers, or internal staff who need to collaborate around a central purpose or concept. For example, you may invite someone to:

- Comment on a conversation topic on how to innovate the supply chain
- Add a file containing the latest product logos and price sheet
- Post a meeting announcement for a Gold Team RFP review

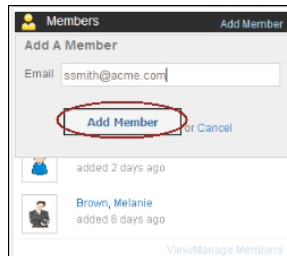
When adding a member, you automatically assign a role to them which grants them access to part or all of the workspace. For details, see [“Workspace Roles” on page 81](#).

Note: You cannot add disabled contacts (that is, any contact that is unavailable in your Contacts list) or external contacts (that is, a contact that is not in your community) to your workspace.

In order to add people, you must have Add Members permission in the workspace. Typically, this is granted to Community and Workspace Administrators.

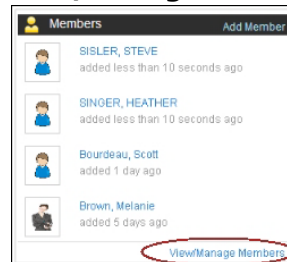
To add people to a workspace

- 1 After clicking **Applications > Workspaces**, and opening a workspace, click **Menu**, and then click **Workspace Settings**.
- 2 If you know the email address of the person that you want to add as a member, click **Add Member** on the workspace home page. Type the email address and click **Add Member**.



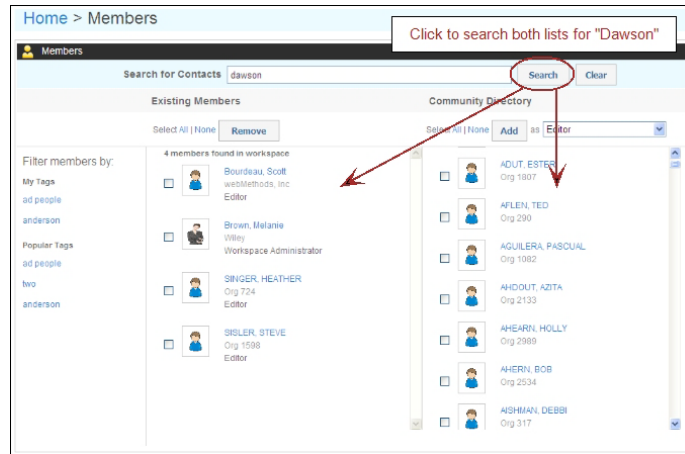
If the email address is matched to a contact profile in your community, the person is added to the workspace (with an Editor role, which allows them to do most tasks except add and remove people). You can skip the rest of this procedure.

- 3 If you don't know the email address of the person you want to add, click **View/Manage Members**.



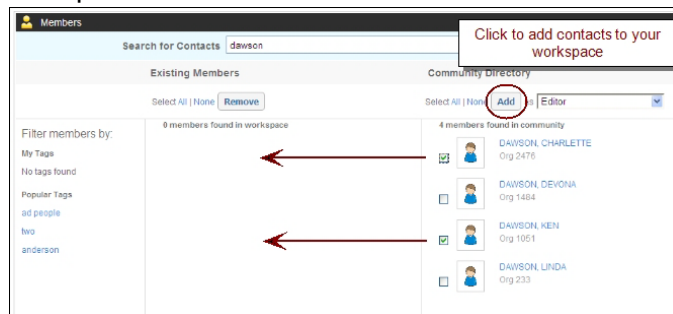
- 4 On the Members page, search for the people you want to add from the Community Directory. To do this, do one of the following:
 - Type the name, email address, or company name of the people you want to find and click **Search**. Keep in mind that this will search both the Existing Members and the Community Directory.
 - Click a tag to show all contacts in Existing Members and the Community Directory that are assigned that tag. These tags are the same as those in your community Contacts list. (To create tags, you must close the

workspace and go back to your community Contacts list. For details, see [“Tagging Search Results with Keywords”](#) on page 107.



- 5 In the search results list, click the check boxes for the people you want to add. In the drop-down list of roles (Editor, etc.), select the level of access that you want them to have in your workspace. For example, if you want a contact to only be able to view the workspace content, click **Observer**. For details, see [“Workspace Roles”](#) on page 81.

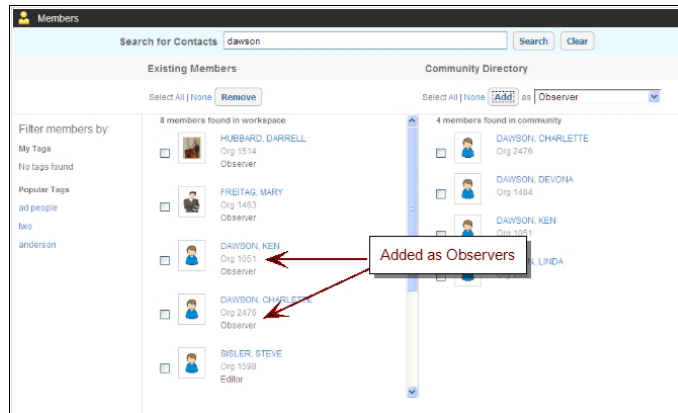
Note: If you add someone from the Community Directory who is already in your workspace, keep in mind that whatever role you selected when you added the person will change their role to the new one. For example, if Joe Smith is an Editor in the workspace, and you select Joe Smith from the Community Directory and add him as an Observer, then Joe Smith's new role in the workspace will be Observer.



- 6 Click **Add**. These people are now part of the workspace and can participate in it as their role allows (such as starting conversations, adding events, etc.). For details, see [“Workspace Roles”](#) on page 81.

Note: If you have set your Workspace Settings to send email notifications about workspace activity, then your newly-added members will also receive those emails. Each member can change how often they receive notifications via

their Preferences. For details, see [“Receiving Emails of Recent Workspace Changes”](#) on page 338.



Sharing Workspace Files

You can easily share documents, logos, product images, and other files with your partners and suppliers by adding files to the File Library in the workspace. When you add them to the File Library, everyone in the workspace can see them automatically. In addition, you can quickly link to any document in the File Library within a conversation, saving time and disk space.

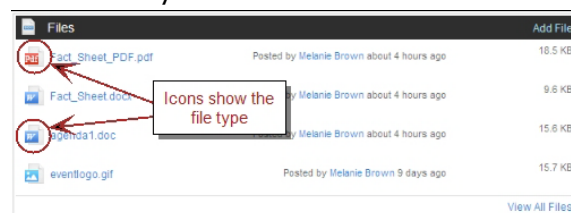
You can also store multiple versions of the same document, enabling you to collect review comments from distributed teams and keep an auditable “paper trail” of changes. If you want to add a new version, simply follow [“Adding a File to a Workspace”](#) on page 336.

Topics include:

- [“Workspace File Types”](#) on page 335
- [“Deleted Files”](#) on page 336
- [“Adding a File to a Workspace”](#) on page 336
- [“Deleting a File from the Workspace”](#) on page 337
- [“Getting Previous Versions of a File”](#) on page 337

Workspace File Types

You can add any kind of file - document, spreadsheet, image, or video, to name a few. The only limitation is that the file must be under 50 MB in size.



Deleted Files

When you delete a file from the File Library, it is permanently removed from the workspace. It can no longer be seen by people and any links to the file within conversations are removed. If you delete a file with multiple versions (hover over the file name to detect versions), then only the most recent version is deleted; the previous version of the file then becomes active.

If you want to delete all versions of a file, you must delete them individually.

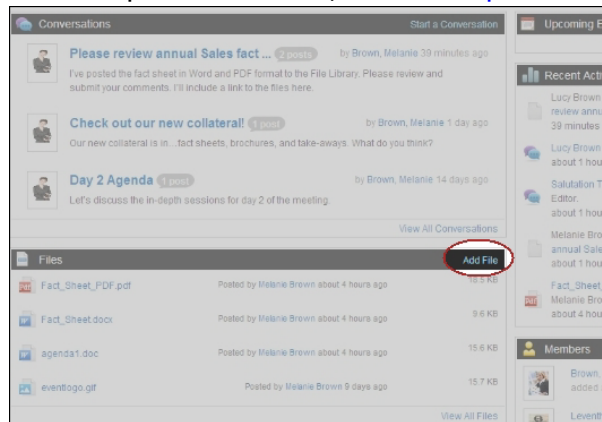
Note: To add or delete a file, you must have Add Files or Delete Files permission in the workspace, respectively. Typically, this is allowed for all workspace roles except Observer. For details, see [“Workspace Roles” on page 81](#).

Adding a File to a Workspace

To add a file to a workspace

- 1 Click **Applications > Workspaces**, and then click **Add File**.

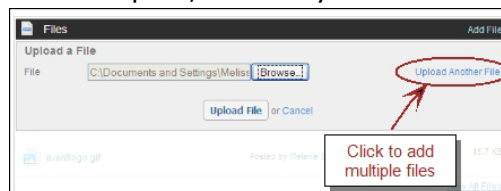
Note: If you do not see the link, then you do not have Add Files permission in the workspace. For details, see [“Workspace Roles” on page 81](#).



- 2 In the Upload a File box, click **Browse**. Navigate to the file on your computer, and click **Open**.

Note: Your file must be 50 MB or less in size.

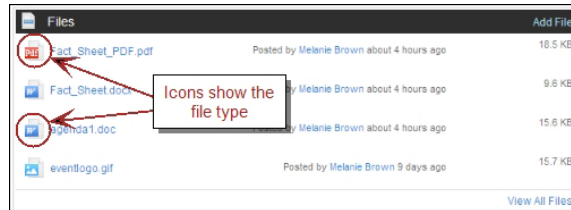
- If you want to add several files at once... **Click Upload Another File** for each file that you want to add.
- If you want to add a new version of a shared file already in the workspace... Simply add the file as if it was a new file to the library. The File Library will automatically detect that the file already exists in the workspace, and add your file as the newest version (“at the top”).



- 3 Click **Upload File**. The file or files that you specified now display in the File Library, with icons to show the type of file (document, spreadsheet, etc.). If you added a file that is already in the library, it is added as the most current version

of that file. To view older versions, see [“Getting Previous Versions of a File”](#) on page 337.

Now that your files are in the library, you can link to them from within conversations. For details, see [“Starting or Replying to a Conversation”](#) on page 340.

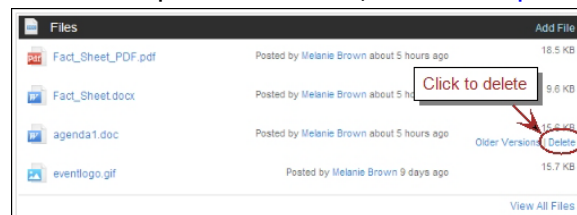


Deleting a File from the Workspace

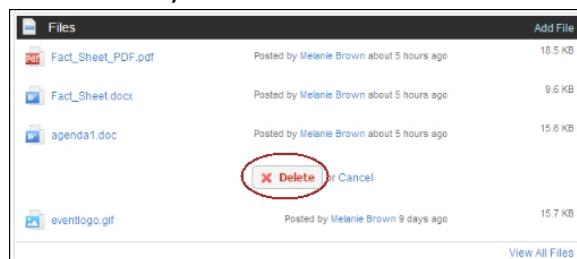
To delete a file

- 1 Click **Applications** > **Workspaces**, and then hover your mouse over the name of the file. Click **Delete**.

Note: If you do not see the link, then you do not have Delete Files permission in the workspace. For details, see [“Workspace Roles”](#) on page 81.



- 2 Confirm that you want to delete the file and click **Delete** again.



- 3 The file is removed from the File Library. If you had any conversation topics that contained links to the file, then those links are also removed. If the file had multiple versions, then only the current version is deleted; the previous version then becomes active in the File Library.

Getting Previous Versions of a File

An important feature of the File Library is the ability to add different versions of the same file. For example, suppose you have a PowerPoint sales presentation that you want workspace members to review. They can each revise the sales deck and add it to the File Library. The Library will show the original file and all revised files that were added by reviewers as versions in a simple collapsible view.

You can view or download copies of each version directly from the File Library. The most current version is always shown at the top of the collapsible list.

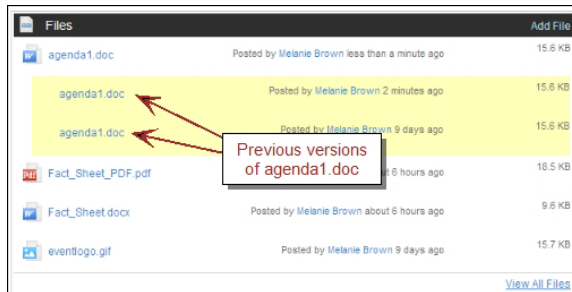
Note: When you delete a file with multiple versions from the File Library, only the most current version is deleted; previous versions are retained. If you want to delete all versions of a file, you must delete them individually.

To get a previous version of a file

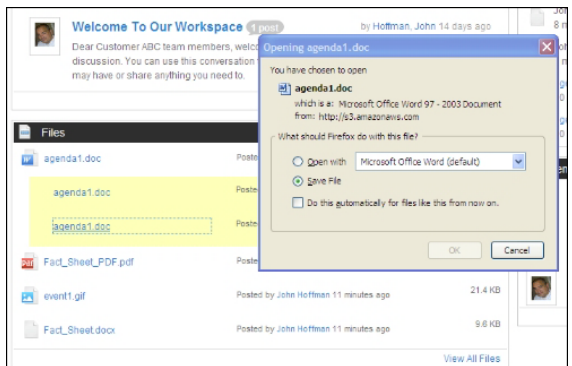
- 1** In the File Library, hover your mouse over the file and click **Older Versions**.



- 2** Click the file name of the version that you want to get.



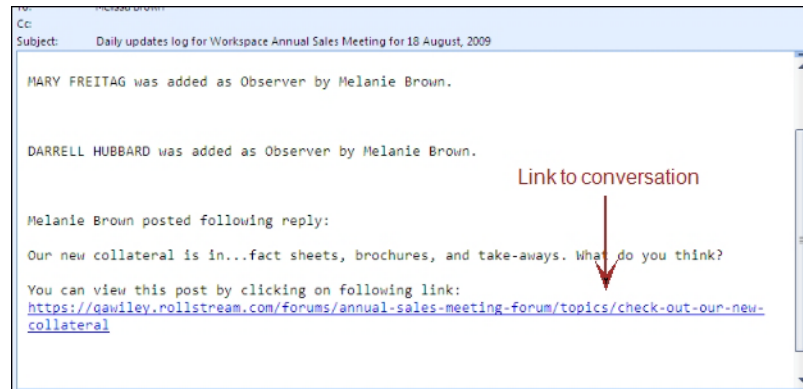
- 3** Open or save the file to your computer. Keep in mind that after you save the file, you can make changes to it and add it as a new version to the File Library.



Receiving Emails of Recent Workspace Changes

To keep up-to-date with recent workspace changes, you can receive alerts of workspace activity by email on an instantaneous basis (one email per change) or daily basis (one email with a summary of the day's activity). You indicate this in your workspace Preferences.

Here is a sample daily notification

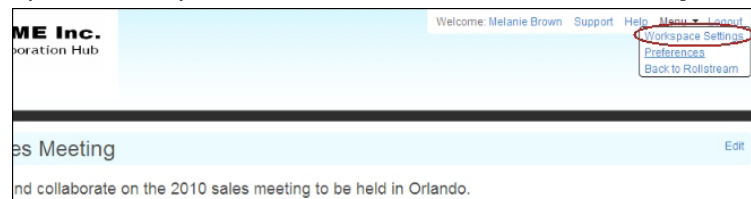


If you do not specify a preference, you will receive email notifications based on the setting that the Workspace Administrator set when they created the workspace. For example, if the person who created the workspace set email notifications to be sent daily, then you will receive an email daily until you specify otherwise.

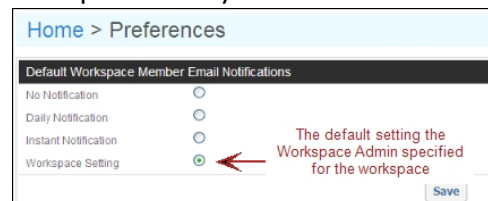
Note: Keep in mind that if you specify that you do not want to receive any notifications, you still may receive email reminders about upcoming events, based on your contact role in your profile. For example, someone in your workspace might create a Sales Meeting event and specify all Sales Reps to receive an email notification. If you have a contact role of Sales Rep in your profile, then you will receive an upcoming event reminder via email. For details, see [“Adding, Editing, and Deleting Events” on page 325](#).

To get recent changes by email

- 1 Click **Applications > Workspaces**.
- 2 Open a workspace, click **Menu**, and then click **Workspace Preferences**.



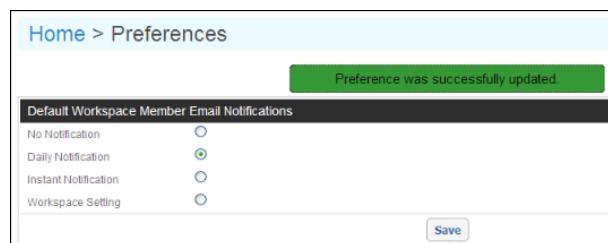
- 3 On the Preferences page, specify how often you want to receive emails about workspace activity.



The following table describes the available options.

Click...	To...
No Notification	Not receive any email about workspace activity. The exception is event reminders; depending on your contact role in your profile, you may receive upcoming event reminders for the workspace. This is controlled by the person who creates the event. For details, see "Adding, Editing, and Deleting Events" on page 325.
Daily Notification	Receive a daily email (usually in the evening) summarizing all of the changes to the workspace over the past 24 hours. The email contains: The name of the workspace A list of changes, such as events added, conversations started, and people added The names of the people who made the changes Links to updated conversations
Instant Notification	Receive an email every time a change occurs in the workspace. For example, if someone is added to the workspace, you will receive a single-line email notifying you of the change. Similarly, if someone replies to a conversation topic, you will receive an email with a link to the updated conversation. Depending on the level of participation in your workspace, this setting may result in a large number of email notifications. You might consider switching to Daily Notification if the number of emails becomes overwhelming.
Workspace Setting	Use the default notification setting that the Workspace Administrator set for the workspace. Every workspace has a default notification setting, such as Daily Notification or Instant Notification. When a person creates a workspace (the Workspace Administrator), he or she can specify how often they want workspace members to receive notifications. You can override this setting by selecting any of the other notification settings in Preferences.

4 Click Save.



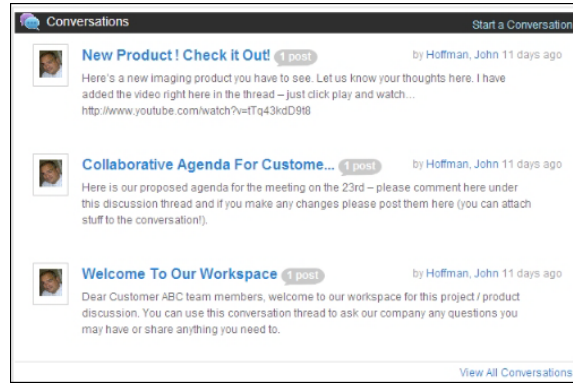
Starting or Replying to a Conversation

Collaboration around a topic in a workspace is known as a conversation.

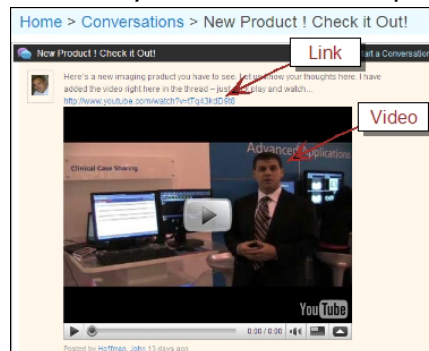
A *conversation* is a topic that in a workspace about any subject or issue that you can post to collaborate with or obtain feedback from partners and suppliers. Similar to an online forum, your partners and customers can post replies to conversations to provide their input on a topic.

For example, you might start a conversation to:

- Encourage ideas on how to innovate the supply chain with Sales and Marketing staff
- Discuss the latest product logos and price sheet with suppliers
- Collaborate on design refinements for the latest surgical bandage product



Within a conversation, you can include links to Web sites of interest, attach documents and images, embed videos, and other media. In addition, you can leverage your workspace file library by linking to shared documents and files that are already stored in the workspace.



Note: To start or reply to a conversation, you must have Start/Reply to Conversations permission in the workspace. Typically, this is allowed for all workspace roles except Observer. For details, see ["Workspace Roles" on page 81](#).

- ["Starting a Conversation" on page 342](#)
- ["Replying to a Conversation" on page 344](#)

Starting a Conversation

To start a conversation

- 1 After clicking **Applications > Workspaces**, and opening a workspace, click **Menu**, and then click **Start a Conversation**.

Note: If you do not see the link, then you do not have Start/Reply to Conversations permission in the workspace. For details, see “[Workspace Roles](#)” on page 81.



- 2 On the Start a New Conversation page, type the subject and body of the topic. Any links to web sites will be automatically converted to clickable links in the conversation, so you can easily paste links to web sites that you want your partners and suppliers to view.

- 3 If you want to include a document, image, video, or any other file, click **Attach a File**.

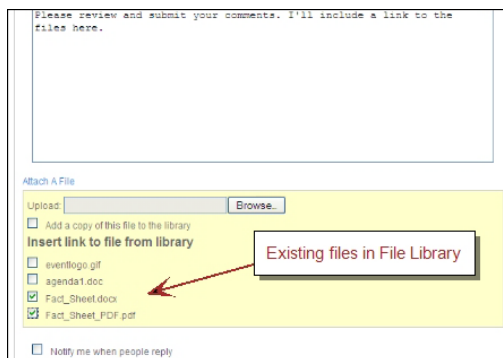
Note: If you do not see the link, then you do not have Add Files permission in the workspace. For details, see “[Workspace Roles](#)” on page 81.

- If you want to attach a new file, click **Browse**, navigate to the file on your computer, and click **Open**. If you also want to share the file with other partners and suppliers by adding it to the workspace File Library, click the **Add a copy of this file to the library** check box. This can be helpful if you know that you will need to share or reference a document in the future.

Note: Your file must be 50 MB or less in size.

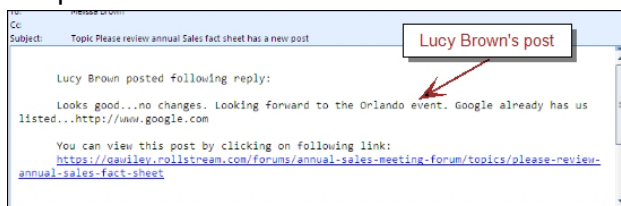
- If you want to link to a shared file already in the workspace, select the check box for the file to which you want to include a link. All of the files listed have been added to the workspace File Library. When a partner or

supplier clicks the link, it will take them directly to the file in the File Library and open it.

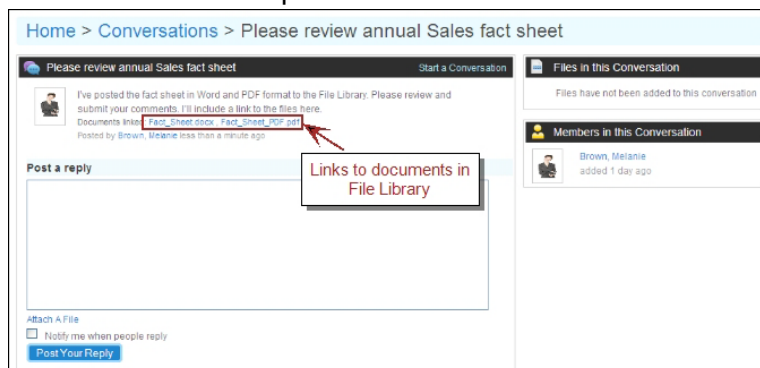


- 4 If you want an email sent to you when others post feedback to your conversation, click the Notify me when people reply check box.

Sample Email Notification



- 5 Click **Post Topic**. Any files that you attached or linked to automatically become clickable links in the topic.

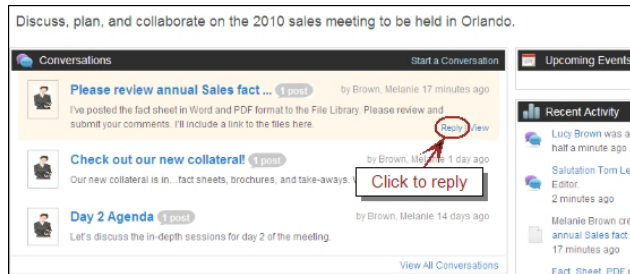


Replying to a Conversation

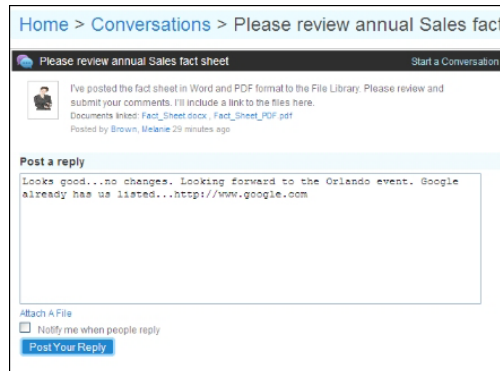
To reply to a conversation

- 1 After clicking **Applications > Workspaces**, and opening a workspace, hover your mouse over the title of the conversation. Click **Reply**.

Note: If you do not see the link, then you do not have Start/Reply to Conversation permission in the workspace. For details, see “Workspace Roles” on page 81.



- 2 On the Conversation page, type the subject and content of your reply. Any links to web sites will be automatically converted to clickable links in the conversation, so you can easily paste links to web sites that you want your partners and suppliers to view.



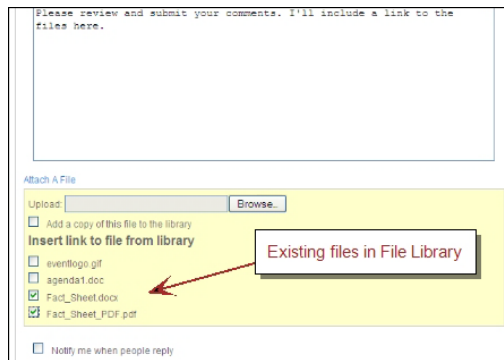
- 3 If you want to include a document, image, video, or any other file, click **Attach a File**.

- If you want to attach a new file... Click Browse, navigate to the file on your computer, and click Open. If you also want to share the file in the workspace File Library, click the Add a copy of this file to the library check box. This can be helpful if you know that you will need to share or reference a document in the future.

Note: Your file must be 50 MB or less in size.

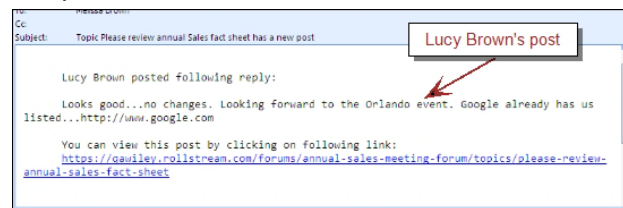
- If you want to include a link to a shared file already in the workspace... Select the check box for the file to which you want to include a link. All of the files listed have been added to the workspace File Library. When a

partner or supplier clicks the link, it will take them directly to the file in the File Library and open it.

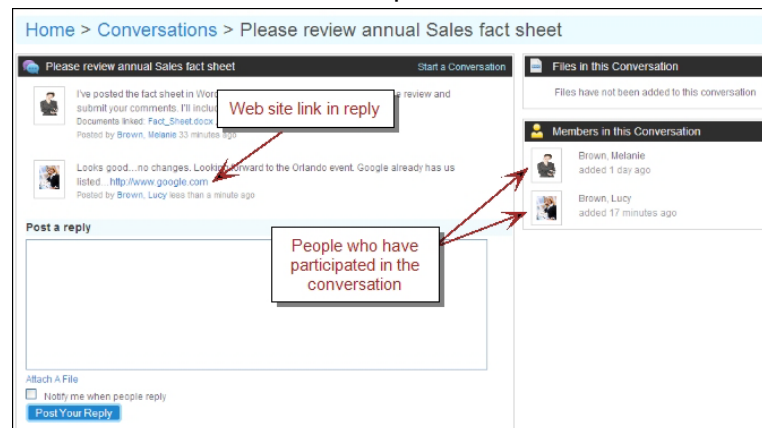


- 4 If you want an email sent to you when others post a reply to your conversation, click the Notify me when people reply check box.

Sample Email Notification



- 5 Click **Post Your Reply**. Any files that you attached or linked to automatically become clickable links in the topic.



Switching Between Different Workspaces

To open a different workspace from the current workspace

- 1 After clicking **Applications > Workspaces**, and opening a workspace, click the **Workspaces** drop-down list.
- 2 Select the workspace you want from the list.

A *web form* is an electronic form that lets a Community Administrator gather survey information about business contacts, trading partners, suppliers, and other contacts. A web form can be used to prompt contacts for information. The contacts can be inside your Active Community community or they can be outside of it. For example, you can create a supplier survey to ask if suppliers are compliant with an industry standard. Or, you can create a trading partner survey to prompt partners for company information, such as average sales volume or inventory.

Topics include:

- ["Web Forms Overview" on page 347](#)
- ["Creating a Web Form for Inside Your Community" on page 355](#)
- ["Creating a Web Form for Outside Your Community" on page 358](#)
- ["Adding Question Choices for Shared Formats" on page 362](#)
- ["Adding Question Choices for Web Form Formats" on page 363](#)
- ["Copying a Web Form to Create a New One" on page 367](#)
- ["Testing a Web Form" on page 368](#)
- ["Publishing a Web Form" on page 370](#)
- ["Distributing a Web Form" on page 372](#)
- ["Viewing Web Form Results" on page 373](#)
- ["Working with Web Forms" on page 374](#)

Web Forms Overview

A *web form* is an electronic form that allows you to gather survey information about contacts inside or outside your community.

Topics include:

- ["Web Form General Settings" on page 348](#)
- ["Groups, Questions, and Choices" on page 349](#)
- ["Web Form Question Formats" on page 350](#)
- ["Web Form Planning" on page 352](#)
- ["Web Form Setup Process" on page 353](#)
- ["How Do I?" on page 353](#)

Web Form General Settings

Active Community provides two types of web forms, those for contacts:

- Inside an Active Community community, called *community* web forms
- Outside an Active Community community, called *public* web forms

Community Web Forms (Tracked or Anonymous Responses)

Community web forms are web forms sent to contacts *inside* an Active Community community. Community web forms must be associated with an activity in a project (see ["Adding an Activity to a Project" on page 290](#)).

Community web forms can be configured to track responses, gather anonymous responses, or collect responses by company. That is, Active Community can:

- Track responses and identify participants by name in the results

- Create anonymous responses so the hub sees only answers to questions, not the names of the respondents
- Collect company-level responses instead of individual contact responses. When any participant in a company responds, the project activity is marked as complete for the company. You define "complete by company" settings when adding an activity to a project.

Existing custom field questions can be copied to and included in community web forms. *Custom fields* supplement the basic information in core fields in contact and company profiles.

See ["Creating a Web Form for Inside Your Community" on page 355](#).

Public Web Forms (Anonymous Responses)

Public web forms gather information about contacts who are *outside* of an Active Community community. Contacts use a URL to access the web form. You can add the contacts to your community later by ["Importing Companies and Contacts Using CSV Files" on page 128](#).

For example, after conducting a national sales meeting, you can decide to send a survey to registrants who are not yet part of your community.

Public web forms are associated with a project, but they are not associated with a project activity.

General Settings:
Please select one of the following to be the default setting for this Web Form:

Community (with tracked responses)

Community (with anonymous responses)

Public

Responses are anonymous. The Community Administrator can view answers to web form questions, but cannot view information about the contact who responded.

See [“Creating a Web Form for Outside Your Community” on page 358.](#)

Groups, Questions, and Choices

Web form questions are organized into groups that contain related questions. Each question has choices that contacts select or type when answering a question. For example, a group could be named “Colors,” and the a question might be “What is your favorite color?” The choices associated with the question might be red, green, yellow, and blue.

Web form questions are similar to custom field questions. Both contain groups, questions and choices.

- A *group* is a group of related questions that are in a named section.
- A *question* is a question in a group.
- A *choice* is a selection that contacts make when responding to a question in a group.

In the Group column, the table displays two custom field groups, Company Information and Company Ownership. For each group, the Question and Choices columns contain questions and choices. The same concepts apply to web forms.

Groups	Questions	Choices
<ul style="list-style-type: none"> ■ Company Information 	<ul style="list-style-type: none"> ■ What is your industry? 	<ul style="list-style-type: none"> ■ Manufacturing ■ Processing ■ Distribution
	<ul style="list-style-type: none"> ■ In which countries do you operate? 	List of countries
	<ul style="list-style-type: none"> ■ How many employees? 	Number field
<ul style="list-style-type: none"> ■ Company Ownership 	<ul style="list-style-type: none"> ■ Who owns your company? 	Text fields for names
	<ul style="list-style-type: none"> ■ Percentage ownership? 	Number fields for numbers

Important: You should review [“Custom Field Overview” on page 221](#) and [“Working with Custom Fields” on page 258](#) to better understand basic concepts.

The table indicates where contacts answer custom field or web form questions.

For...	Contacts answer them:
Custom field questions	When updating a contact or company profile in Active Community
Web form questions	By responding to questions in a web form

Web Form Question Formats

Most, but not all, web form question formats are the same as custom field question formats. A question's format determines how the question displays in a web form or a company or contact profile.

The following question formats are shared between questions for web forms and custom fields. Click a link to see more information, including an example, of the format as users see it.

- ["Drop List"](#)—Creates a field that is a drop-down list with multiple options.
- ["Multiple Choice"](#)—Creates a custom field with one or more check boxes.
- ["Radio Button List"](#)—Creates a custom field with a list of one or more answers with radio buttons. Users can select one answer.
- ["True/False"](#)—Creates a pair of radio buttons with True or False as the answer to the question.
- ["Yes/No"](#)—Creates a pair of radio buttons with Yes and No as the answer to the question.
- ["Text"](#)—Creates a text box with a single line of text (up to 256 characters).
- ["Number"](#)—Creates a box that contains a single line of numbers.
- ["Date"](#)—Creates a a calendar date in MM/DD/YYYY format.
- ["Text Area"](#)—Creates a text box that can contain multiple lines of text.
- ["Display Image"](#)—Creates a custom field that allows contacts to upload and show an image file, such as a logo or product image, in a custom field.
- ["File Upload"](#)—Creates a custom field that allows contacts to upload a file to their profile in Active Community.
- ["Company Link"](#)—Creates a custom field with a company hyperlink that can be used to navigate to more detailed data within Active Community.
- ["Specialized"](#)—Creates a custom field that has pre-configured formatting based on the type of configuration selected. Configurations include:
 - An Email option that allows hubs to collect one or more email addresses which must be in the correct format.
 - A Tax ID (EIN) option that allows hubs to collect one or more tax identification numbers which must be in the correct format.

The following question formats are unique to web form questions. They are not available for custom field questions.

Topics include:

- ["Company Profile" on page 351](#)
- ["Contact Profile" on page 351](#)
- ["Collect Contact" on page 351](#)
- ["Custom Field..." on page 352](#)

Company Profile

This question format is unique to web form questions.

Use the Company Profile format to create a web form and have recipients update core fields in their company profiles. Active Community uses the recipient's answers to record and overwrite existing data in their company profiles.

For procedural information, see ["Adding Question Choices for Web Form Formats"](#) on page 363.

Contact Profile

This question format is unique to web form questions.

Use the Contact Profile format to create a web form and have recipients update core fields in their contact profiles. Active Community uses the recipient's answers to record and overwrite existing data in their contact profiles.

For procedural information, see ["Adding Question Choices for Web Form Formats"](#) on page 363.

Collect Contact

This question format is unique to web form questions.

Use the Collect Contact format to collect contacts for existing companies and assign them to different contact (business) roles already setup in your community. The question format lets you add, edit, or disable roles for all active contacts in your community.

Select functional roles to be collected for contacts:			
Available Roles	Hidden	Required	Optional
Contact	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Admin	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
CEO	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VP	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employee	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pooja Business Role	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
add role	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

For procedural information, see ["Adding Question Choices for Web Form Formats"](#) on page 363.

Custom Field...

This question format is unique to web form questions.

Use the Custom Field... format to create a web form to have recipients update custom field information in their company or contact profiles. Use the Custom Field... format to copy contact or company profile fields into the web form.

Important: The copied custom fields display in the web form and include data in contact or company profiles (if the profile has data). When contacts respond to questions in the web form, their answers overwrite existing data in their contact or company profiles.

Custom fields supplement core field information stored in contact and company profiles. If you do not have the View Question Group permission assigned to your role for a custom field, those groups are not displayed in the Choose a Custom Field drop-down list.

Editing New Custom field

Choose the type of Custom Field:

Custom Field...

Choose a Custom Field:

- Contact - Parent Group - Display Text
- Contact - Parent Group - Display Text
- Contact - Parent Group - Display Text
- Contact - Parent Group - New Question
- Contact - Parent Group - New Question
- Contact - Parent Group - Specialty
- Contact - Parent Group - What are your annual sales in millions?
- Contact - Parent Group - Number of shifts per week

For procedural information, see ["Adding Question Choices for Web Form Formats"](#) on page 363.

Web Form Planning

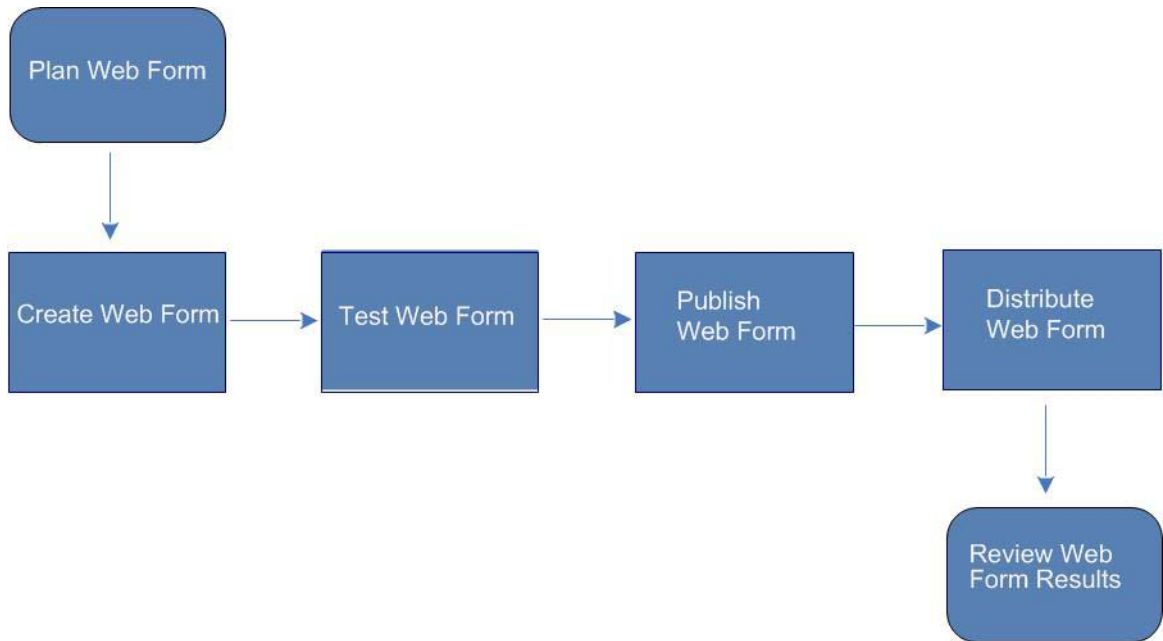
Web forms provide many options for surveying contacts inside and outside an Active Community community. Careful planning is required.

Follow this process to send a web form to a set of suppliers in your community:

- 1 Create a project (see ["Creating a Regular or Activity Managed Project"](#) on page 287).
- 2 Create a web form that contains survey questions and possible answers as described in this section.
- 3 In the project, create an activity that emails the web form to suppliers.
- 4 In the activity, associate the web form to the activity and add suppliers (contacts) to the participant list (see ["Adding Participants to an Existing Activity"](#) on page 299).

Web Form Setup Process

The graphic outlines the phases in the web form creation process.



Note: For a summary of planning options, see ["How Do I?"](#) on page 353.

How Do I?

Based on how a web form is to be used to gather survey responses, you must plan which options to choose when you create a web form. You choose from among the options in the table.

If you want to...	Choose (or use) the following option:	When you are:
Create a web form for contacts: <ul style="list-style-type: none"> Inside your community 	In General Settings, select: <ul style="list-style-type: none"> Community (with tracked responses) or Community (with anonymous responses) 	"Creating a Web Form for Inside Your Community" on page 355
<ul style="list-style-type: none"> Outside your community 	In General Settings, select: <ul style="list-style-type: none"> Public 	"Creating a Web Form for Outside Your Community" on page 358
Track responses: <ul style="list-style-type: none"> Anonymously 	In General Settings, select: <ul style="list-style-type: none"> Community (with anonymous responses), or Public 	<ul style="list-style-type: none"> "Creating a Web Form for Inside Your Community" on page 355
<ul style="list-style-type: none"> By contact 	<ul style="list-style-type: none"> Community (with tracked responses) 	<ul style="list-style-type: none"> "Creating a Web Form for Outside Your Community" on page 358
<ul style="list-style-type: none"> By company 	In Activity Settings, select: <ul style="list-style-type: none"> Complete by Company 	"Adding an Activity to a Project" on page 290

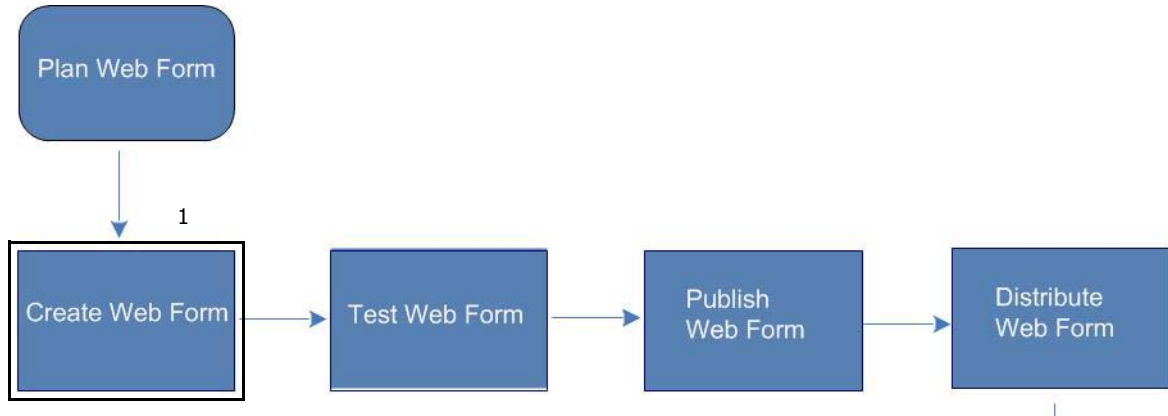
If you want to...	Choose (or use) the following option:	When you are:
Use Custom Fields		
Use question formats shared by web forms and custom fields	Formats: <ul style="list-style-type: none"> ■ Drop List ■ Multiple Choice ■ Radio Button List ■ True/False ■ Yes/No ■ Text ■ Number ■ Date ■ Text Area ■ Display Image ■ File Upload ■ Company Link ■ Specialized 	"Adding Choices to Custom Field Questions by Format" on page 248
Use question formats unique to web forms	Formats: <ul style="list-style-type: none"> ■ Company Profile ■ Contact Profile ■ Collect Contacts ■ Custom Field... 	"Adding Question Choices for Web Form Formats" on page 363
Copy custom field questions to a web form	<ul style="list-style-type: none"> ■ For contacts inside your community, click Edit Form Information. 	"Editing Web Form Questions" on page 375
Test a Web Form		
Test a web form	<ul style="list-style-type: none"> ■ Click Test. 	"Testing a Web Form" on page 368
Publish a Web Form		
Publish a web form	<ul style="list-style-type: none"> ■ Click Publish. 	"Publishing a Web Form" on page 370
Distribute a Web Form		
Distribute a web form to contacts <ul style="list-style-type: none"> ■ Inside a community 	<ul style="list-style-type: none"> ■ Add an activity to a project and associate the web form with the activity 	"Adding an Activity to a Project" on page 290 or "Distributing a Web Form" on page 372
<ul style="list-style-type: none"> ■ Outside a community 	<ul style="list-style-type: none"> ■ Distribute the web form URL to contacts outside a community 	"Distributing the URL for a Public Web Form" on page 377
View Web Form Results		
Export web form results <ul style="list-style-type: none"> ■ In a community 	<ul style="list-style-type: none"> ■ Projects > Select a project > Click the: <ul style="list-style-type: none"> ■ Activities tab > Select the activity > Click the Web Forms tab > Click View > Click Export All. 	<ul style="list-style-type: none"> ■ "Viewing Web Form Results" on page 373 ■ "Exporting Web Form Results" on page 378
<ul style="list-style-type: none"> ■ Outside a community 	<ul style="list-style-type: none"> ■ Web Forms tab > Click View > Click Export All. 	
Print web form responses	<ol style="list-style-type: none"> 1 Login to Active Community or click a link in an email. 2 Respond to questions, then click Submit > Print. 	"Responding to Web Forms" on page 379

Creating a Web Form for Inside Your Community

Permissions required:

- Security: Add Projects (Admin > Security Roles tab)
- Project: Web Form-related permissions (Projects > Permissions tab)

A web form allows you to quickly and easily collect information from your business contacts by using a survey called a web form. The first phase of the web form set up process is to name the web form, define how you want it to collect responses, and setup up custom field groups, questions and question choices.



Create Web Form:

Key	Description
1	To create a web form: <ul style="list-style-type: none"> ■ Give it a name ■ Define how to collect responses ■ Create question groups, questions, and choices

Important: Before creating a web form, you must create a project. After the web form has been created, you associate the web form with an activity (see [“Web Form Planning” on page 352](#)).

To add a web form

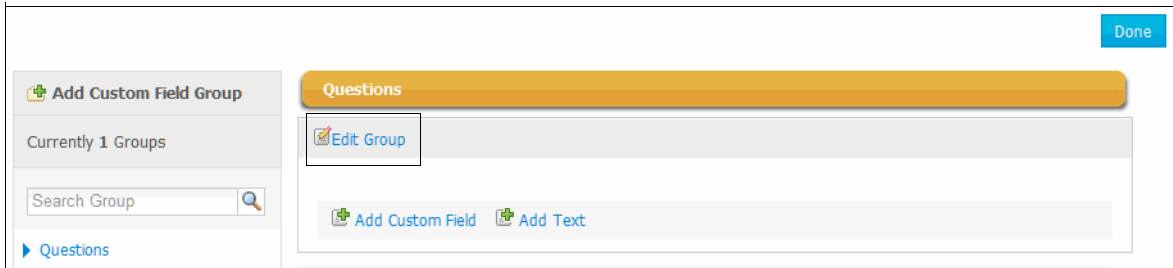
- 1 Click **Projects** and locate and open the project to which you want to add a web form.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 Click **Add Web Form**.

The Creating a New Web Form page opens.

- 4 In Web Form Name, type the name of the web form, which can be a survey, poll, or request for information (required). Example: Supplier Diversity Survey
- 5 In Description, type optional text that provides more detail about the web form, such as its purpose and the deadline for responses.

Note: Recipients see the description, as well as all other fields in the form.
- 6 In General Settings, select either:
 - Community (with tracked responses)—Creates a community web form to be sent to contacts in the Active Community community. Respondents are identified by name and company in survey results.
 - Community (with anonymous responses)—Creates a community web form to be sent to contacts in the Active Community community. Removes the respondents' First Name, Last Name, Company Name, and Company ID from web form results. The Community Administrator sees only answers to questions, not information about the contact who responded to the questions.
- 7 Click **Save Changes**.

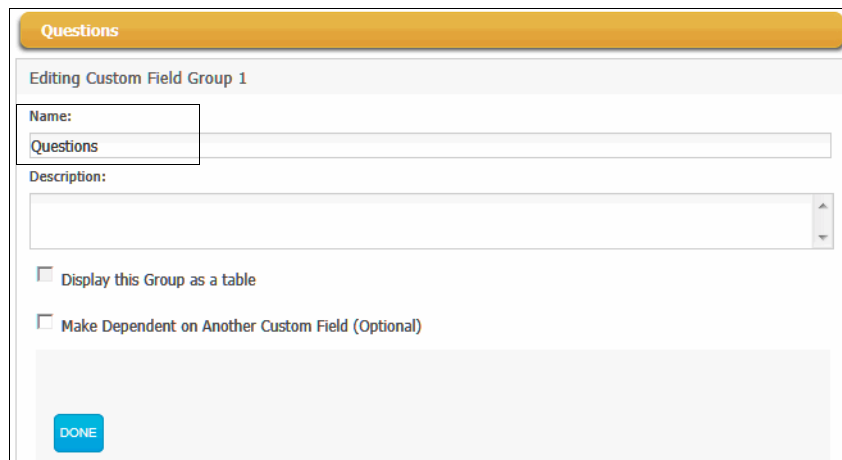
The question group, called "Questions," opens.



Note: A *question group* is a grouping of related questions. The questions are in a separate section.

8 Click **Edit Group**.

The Editing Custom Field Group page opens.



9 In Name, type over the word "Questions" and give the group a name, such as "Level of Performance."

10 In Description, type more detail about the question group; for example, "Information about the quality and frequency of communication with suppliers." Contacts who respond to the survey can see the description.

11 Perform the appropriate action (optional):

Select...	To:
<ul style="list-style-type: none"> ■ Display this group as a table 	Display all questions in the group in a data table, which allows multiple answers to each question (see "Creating Questions in Data Tables" on page 262).
<ul style="list-style-type: none"> ■ Make dependent on another question (optional) 	Make a question conditional based on the answer to another question (see "Creating Dependent Questions" on page 259).

12 Click **Done**.

You have created a web form with a question group. At the top of the page, the name of the group refreshes with the name you typed in step 9.

13 Next steps (required):

- a** Add *questions* to the group (go to ["Adding Custom Field Questions to Groups"](#) on page 243).
- b** Define *choices* for contacts to select for each question based on question's format. Perform the appropriate action:

For these question formats...		Go to:
<ul style="list-style-type: none"> ■ Drop List ■ Multiple Choice ■ Radio Button List ■ True/False ■ Yes/No ■ Text ■ Number 	<ul style="list-style-type: none"> ■ Date ■ Text Area ■ Display Image ■ File Upload ■ Company Link ■ Specialized 	"Adding Question Choices for Shared Formats" on page 362
<ul style="list-style-type: none"> ■ Company Profile ■ Contact Profile 	<ul style="list-style-type: none"> ■ Collect Contact ■ Custom Field... 	

Creating a Web Form for Outside Your Community

Permissions required:

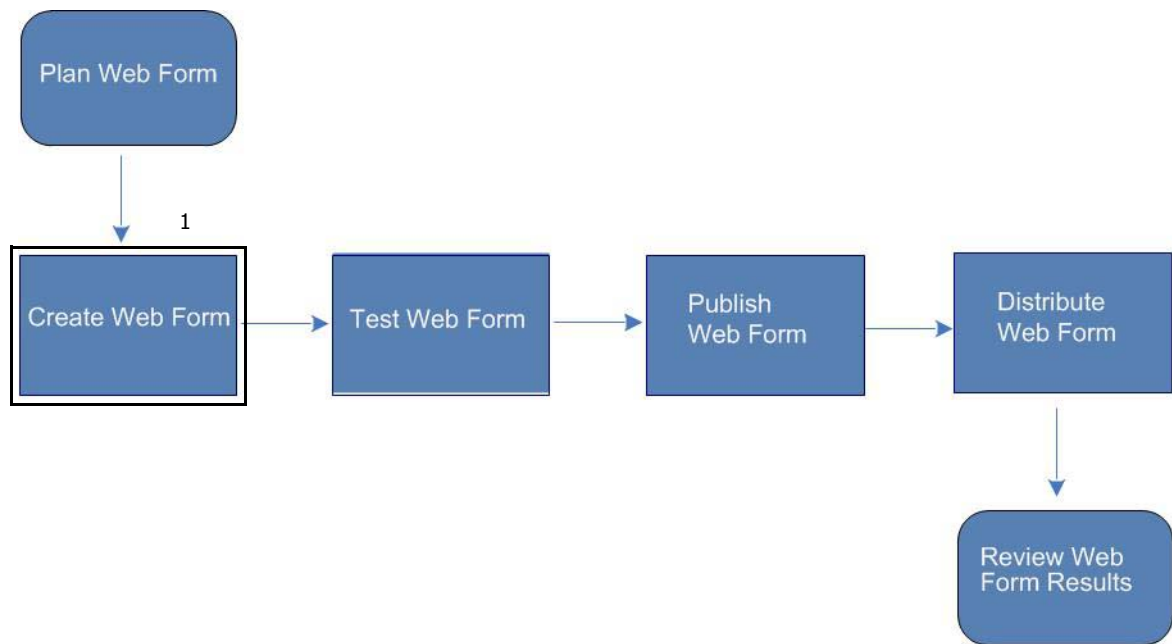
- Security: Add Projects (Admin > Security Roles tab)
- Project: Web Form-related permissions (Projects > Permissions tab)

A web form allows you to quickly and easily collect information from your business contacts by using a survey called a web form. Public web form results are similar to community web form results, except responses are anonymous.

Because respondents are not yet part of your Active Community community, you cannot use custom fields in the web form. *Custom fields* supplement the basic information contained in core fields in contact and company profiles. You can, however, add groups, questions, and choices to a public web form.

After the form has been created, tested, and published, use an email to distribute the web form URL to contacts. There is no need to link a public web form to an activity in a project.

The first phase of the web form setup process is to name the web form, define how you want it to collect responses, and setup up web form groups, questions and question choices.



Create Web Form:

Key	Description
-----	-------------

- | | |
|---|---|
| 1 | To create a web form: <ul style="list-style-type: none"> ■ Give it a name ■ Define how to collect responses ■ Create question groups, questions, and choices |
|---|---|

Important: Before creating a public web form, you must create a project.

To add a web form

- 1 Click **Projects** and locate and open the project to which you want to add a web form.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 Click **Add Web Form**.

The Creating a New Web Form page opens.

- 4 In Web Form Name, type the name of the web form, which can be a survey, poll, or request for information (required). Example: Supplier Diversity Survey
- 5 In Description, type optional text that provides more detail about the web form, such as its purpose and the deadline for responses.
Note: Recipients see the description, as well as all other fields in the form.
- 6 In General Settings, select **Public** to generate a link (URL) to the web form after the web form has been published.
 The host distributes the URL to contacts outside an Active Community community.
- 7 Click **Save Changes**.

The question group, called "Questions," opens.

Note: A *question group* is a grouping of related questions. The questions are in a separate section.

8 Click Edit Group.

The Editing Custom Field Group page opens.

- 9** In Name, type over "Question" and give the group a name, such as "Level of Performance."
- 10** In Description, type more detail about the question group; for example, "Information about the quality and frequency of communication with suppliers." Contacts who respond to the survey can see the description.
- 11** Perform the appropriate action (optional):

Select...	To:
<ul style="list-style-type: none"> ■ Display this group as a table 	Display all questions in the group in a data table, which allows multiple answers to each question (see "Creating Questions in Data Tables" on page 262).
<ul style="list-style-type: none"> ■ Make dependent on another question (optional) 	Make a question conditional based on the answer to another question (see "Creating Dependent Questions" on page 259).

12 Click Done.

You have created a web form with a custom field group. At the top of the page, the name of the group refreshes with the name you typed in step 9.

13 Next steps (required):

- a** Add *questions* to the group (go to ["Adding Custom Field Questions to Groups" on page 243](#)).

- b** Define *choices* for contacts to select for each question based on question’s format. Perform the appropriate action:

For these question formats...		Go to:
<ul style="list-style-type: none"> ■ Drop List ■ Multiple Choice ■ Radio Button List ■ True/False ■ Yes/No ■ Text ■ Number 	<ul style="list-style-type: none"> ■ Date ■ Text Area ■ Display Image ■ File Upload ■ Company Link ■ Specialized 	“Adding Question Choices for Shared Formats” on page 362
<ul style="list-style-type: none"> ■ Company Profile ■ Contact Profile 	<ul style="list-style-type: none"> ■ Collect Contact ■ Custom Field... 	

Adding Question Choices for Shared Formats

Web forms share the following question formats with custom fields:

- Drop List
- Multiple Choice
- Radio Button List
- True/False
- Yes/No
- Text
- Number
- Date
- Text Area
- Display Image
- File Upload
- Company Link
- Specialized

To add question choices for shared formats

- Go to step 2 in [“Adding Choices to Custom Field Questions by Format” on page 248](#).

Adding Question Choices for Web Form Formats

Security role: Community Administrator

Security permissions required: Custom Field Permissions > Manage Custom Fields, View Question Group

Important: This procedure describes how to add choices for question formats that are *unique to web forms*, such as Company Profile, Contact Profile, Collect Contact, and Custom Fields. To learn how to add choices to formats shared by custom fields and web forms, see [“Adding Choices to Custom Field Questions by Format” on page 248](#).

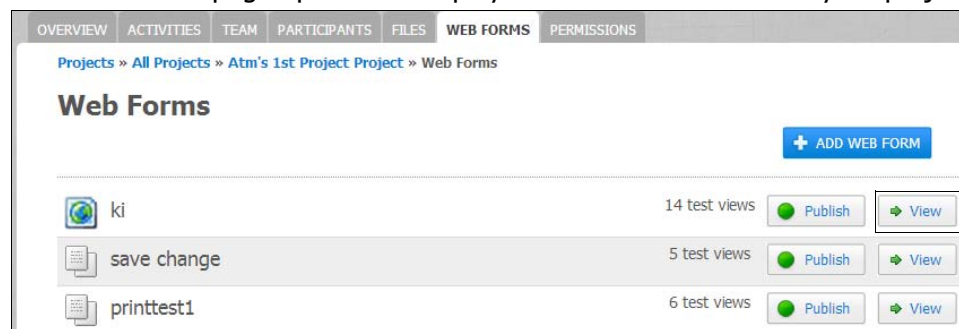
The next phase in creating web forms is to define the *choices* you want users to use when they respond to web form questions.

Use this procedure to add choices to a question in a group.

To add choices to web form questions

- 1 Click **Projects**, open the project in which you want to add a question choice to a web form, and click the **Web Forms** tab.

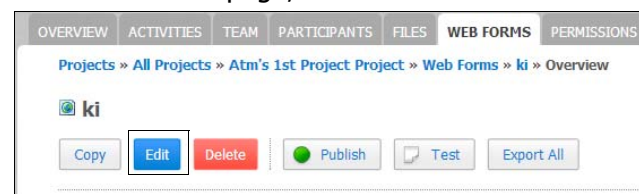
The Web Forms page opens and displays a list the web forms for your project.



- 2 Click **View** for a web form.

The web form you selected opens.

- 3 On the web form page, click **Edit**.



- 4 Select the custom field group to which you want to add a choice.

- 5 Click **Insert Custom Field Here**.


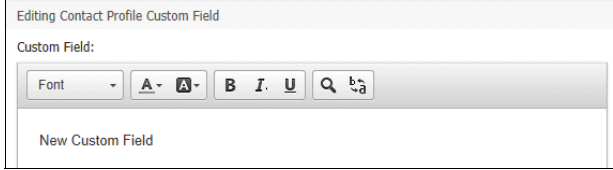


The Editing New Custom Field section opens at the selected location in the question group.

- In the Choose the Type of Custom Field drop-down list, select the type of *web form-unique question* you want to create (Company Profile, Contact Profile, Collect Contact, or Custom Field).

Note: To add question choices for formats shared with custom fields, see ["Adding Question Choices for Shared Formats"](#) on page 362.

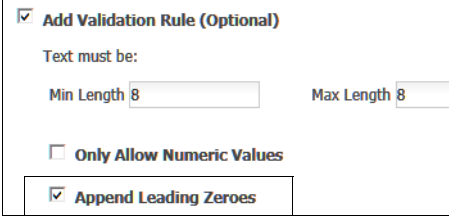
- Perform the appropriate action:

If you selected...	Do this:
Company Profile	<ol style="list-style-type: none"> Click Next. In Custom Field, type the question text, such as "What is your buying area?" to replace the "New Custom Field" text that displays automatically. <p>Note: If needed, use the formatting icons to emphasize any text in the question, such as making a word bold or changing the font.</p>  <ol style="list-style-type: none"> In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question. Go to step 8.
Contact Profile	<ol style="list-style-type: none"> Click Next. In Custom Field, type the question text, such as "What is your buying area?" to replace the "New Custom Field" text that displays automatically. <p>Note: If needed, use the formatting icons to emphasize any text in the question, such as making a word bold or changing the font.</p>  <ol style="list-style-type: none"> In Instructions, type the help text for a question. The text displays when contacts click the help icon for the question. Go to step 8.

If you selected...	Do this:																																				
Collect Contact	<ol style="list-style-type: none"> 1 Click Next. 2 In Custom Field, type the question text. 3 In Instructions, edit the help text for the question. The text displays when contacts click the help icon for the question. 4 In Select Functional Roles to be Collected for Contacts, select the roles you want contacts to select in the web form based on the column headings: <table border="1" data-bbox="815 520 1455 709"> <thead> <tr> <th colspan="4">Select functional roles to be collected for contacts:</th> </tr> <tr> <th>Available Roles</th> <th>Hidden</th> <th>Required</th> <th>Optional</th> </tr> </thead> <tbody> <tr> <td>Contact</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Admin</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>CEO</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>VP</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Employee</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Pooja Business Role</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> <tr> <td>add role</td> <td><input type="radio"/></td> <td><input type="radio"/></td> <td><input type="radio"/></td> </tr> </tbody> </table> <ul style="list-style-type: none"> ■ Hidden Roles—Roles you do not want to show or collect in the web form. ■ Required Roles—Roles that display with an asterisk in the web form. The contact completing the web form must add a new contact or assign an existing contact from the list to the contact (business) role. ■ Optional Roles—Roles that show in the web form, but the contact completing the web form has the option of adding a new contact or assigning an existing contact to the contact (business) role. 5 Go to step 8. 	Select functional roles to be collected for contacts:				Available Roles	Hidden	Required	Optional	Contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	CEO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	VP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Employee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Pooja Business Role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	add role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Select functional roles to be collected for contacts:																																					
Available Roles	Hidden	Required	Optional																																		
Contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
Admin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
CEO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
VP	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
Employee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
Pooja Business Role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
add role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																																		
Custom Field Important: If you do not have the View Question Group permission assigned to your role for a custom field, the group is not displayed in the drop-down list.	<ol style="list-style-type: none"> 1 Click Next. 2 In the Choose a Custom Field drop-down list, select the company or contact custom fields whose questions you want to copy. 3 If the field you are copying has parent/child dependencies, use the check boxes to select the dependencies you want to be copied to the web form custom field. <table border="1" data-bbox="815 1329 1455 1566"> <thead> <tr> <th colspan="2">Company - child_dependent_droplist - multiplechoice_dl_child_dependent</th> </tr> </thead> <tbody> <tr> <td>Search</td> <td><input type="text"/></td> </tr> <tr> <td></td> <td><input type="checkbox"/> Add All</td> </tr> <tr> <td>parent_droplist</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>droplist parent 2</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>child_dependent_droplist</td> <td><input type="checkbox"/></td> </tr> <tr> <td>droplist dl child</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> 4 Click Copy. Active Community copies the company or contact profile custom fields into the web form. Important: The copied custom fields display in the web form. When responding to web form questions, contacts write data directly into their profiles. 5 Go to step 8. 	Company - child_dependent_droplist - multiplechoice_dl_child_dependent		Search	<input type="text"/>		<input type="checkbox"/> Add All	parent_droplist	<input checked="" type="checkbox"/>	droplist parent 2	<input checked="" type="checkbox"/>	child_dependent_droplist	<input type="checkbox"/>	droplist dl child	<input checked="" type="checkbox"/>																						
Company - child_dependent_droplist - multiplechoice_dl_child_dependent																																					
Search	<input type="text"/>																																				
	<input type="checkbox"/> Add All																																				
parent_droplist	<input checked="" type="checkbox"/>																																				
droplist parent 2	<input checked="" type="checkbox"/>																																				
child_dependent_droplist	<input type="checkbox"/>																																				
droplist dl child	<input checked="" type="checkbox"/>																																				

8 Select any options that are appropriate to the custom field.

Important: Not all options are available for all formats. Based on your selection, additional fields might display. The fields let you refine the question further.

Select...	To:
Make Field Read-Only (Optional)	Make the field read-only. Contacts cannot enter values in the field.
Require Answer to Question (Optional)	Make the question mandatory.
Add Comment Field (Optional)	Allow the contact to add text comments (up to 256 characters) when answering the question.
Add Validation Rule (Optional)	<p>Specify a condition such as:</p> <ul style="list-style-type: none"> ■ "On or before today" or "On or after today" (Date format) ■ "Min Number" and "Max Number" (Number format) ■ "Only Allow Numeric Values (Text format) ■ "Min Length" and "Max Length" (Text format) <p>If the same number is entered in both fields, the Append Leading Zeroes field displays.</p>  <p>Select it if you want zeroes to be appended in front of the entered data.</p> <p>For example, if the value in min/max length is 8 and a question is answered as 123456, Active Community adds two zeroes in front of the answer so the total number of characters equals the min/max length (in this example, 00123456).</p> <p>The Append Leading Zeroes field can be used with or without the Only Allow Numeric Values field; that is, you can append zeroes to both numeric and alphanumeric values.</p>
Add New Contacts (Optional)	Allow the contact completing the web form to add a new contact and assign the contact to a contact (business) role.
Edit Existing Contacts (Optional)	Allow the contact completing the web form to edit the contact profile of a person listed. Can be used, for example, when reviewing and updating a job title, phone number, address, etc.
Disable Existing Contacts (Optional)	Allow the contact completing the web form to disable a contact from the list, such as if a contact is no longer with the company.
Make Dependent on Custom Field (Optional)	Make a question conditional based on the answer to another question. The other question must have already been defined (see "Creating Dependent Questions" on page 259).
Set Default Answer (Optional)	Specify a default value for the answer in the text box.

Select...	To:
Enable Multiple Values (Optional)	Allow more than one value to be added where values are separated by a comma.
Enable Masking (Optional)	This option cannot be changed for a copied custom field. The check box is unavailable and the selection that was made for the original company custom field remains intact. If the Enable Masking check box is selected, and you have "View Masked Field" permission, you will see masked field values in the response. Spoke users see masked field values for their companies if they have "View My Company" permission (see "Security Role Permission Descriptions" on page 57)

9 Click **Done**.

If the type of custom field you are creating is a Company Profile or Contact Profile, the company or contact profile opens with new question groups and choices. If you modified question choices copied from a custom field group, your changes display.

Copying a Web Form to Create a New One

Security role permissions required:

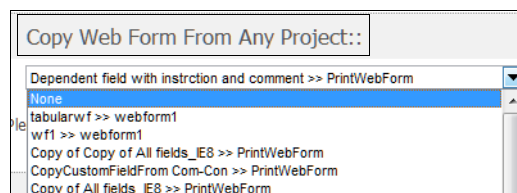
- View Web Forms
- Add Web Forms Project

Use this procedure to create a web form by copying an existing web form from any project. All questions and settings are copied to the new web form. Any existing responses are removed.

You can copy both unpublished and published web forms. Active Community creates the new form in an unpublished state.

To copy a web form

- 1 Click **Projects** and locate and open the project to which you want to add a web form.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 Click **Add Web Form**.
The Creating a New Web Form page opens.
- 4 Under Copy Web Form from Any Project, click the drop-down list and select the existing web form you want to copy to the new web form.
The name (and project) for all web forms in the community are listed.



- 5 Type the name and description of the new web form.
- 6 Under General Settings, indicate if you want the web form to be for contacts inside or outside your community.
 - Community (with tracked responses)—Creates a community web form to be sent to contacts in an Active Community community. Participant names are identified in survey results.
 - Community (with anonymous responses)—Creates a community web form to be sent to contacts in an Active Community community. Removes the respondents' First Name, Last Name, Company Name, and Company ID from the web form results. The Community Administrator sees only answers to questions, not information about the contact who responded to the questions.
 - Public—Generates a link (URL) to the web form after the web form has been published. The host distributes the URL to contacts outside an Active Community community. Responses to survey questions are anonymous.
- 7 Click **Save Changes**.

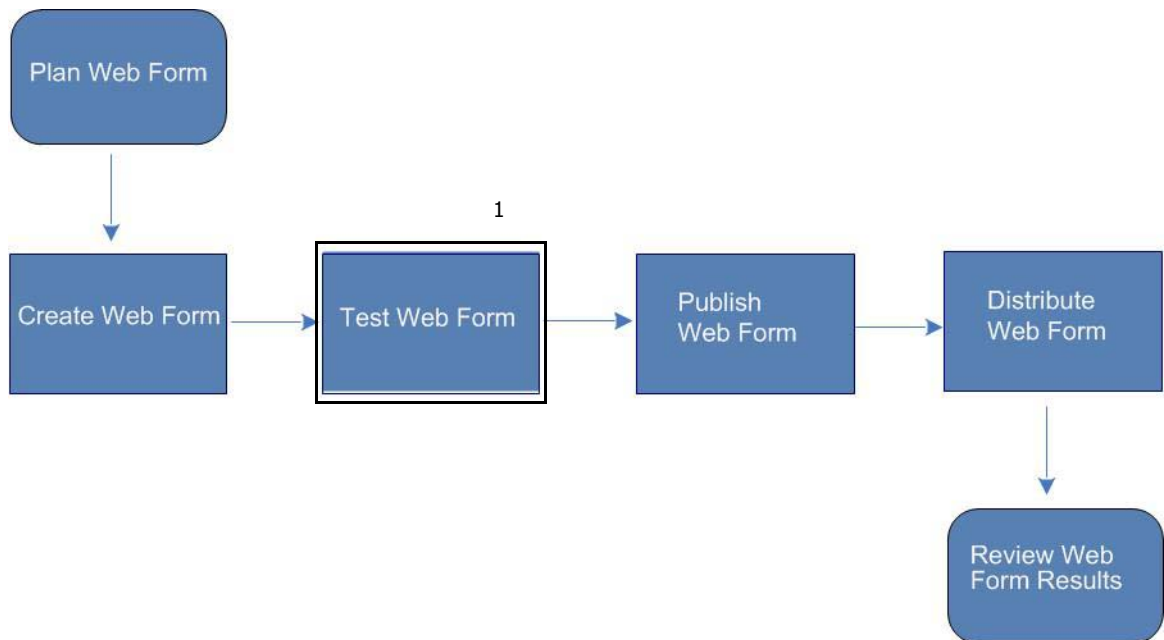
The new web form opens with all questions from the original web form.
- 8 Edit the questions and question groups as needed, and click **Done**.

The web form is ready to be published and used in an activity in a project or to be distributed as a URL to contacts outside your community.

Testing a Web Form

The next phase of the web form setup process is to test the web form. By doing so, you verify the survey is working as expected and can make modifications as needed before publishing the form. Testing lets you see the web form in exactly the same way as survey recipients see it. You can answer questions and see your responses. Active Community *does not* save your test responses.

Before starting this procedure, you must have created a web form.



Test Web Form:

Key Description

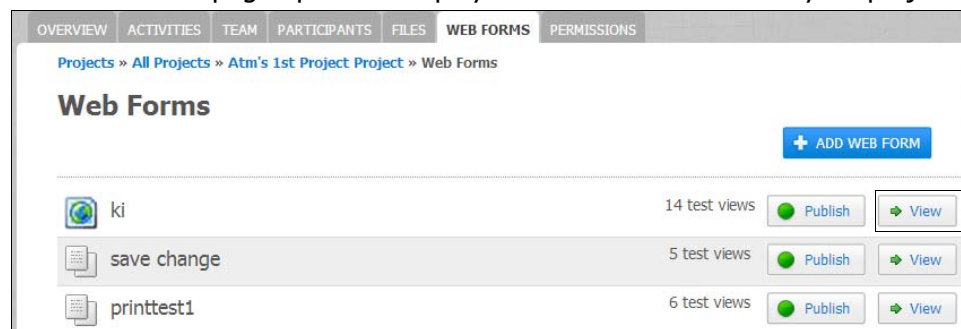
- 1 Test web form and make changes as needed

Important: When testing a public web form, which is one sent to contacts outside your community, you are not able to change it to a non-public (inside your community) web form after it has been tested.

To test a web form

- 1 Click **Projects**, open the project in which you want to test a web form, and click the **Web Forms** tab.

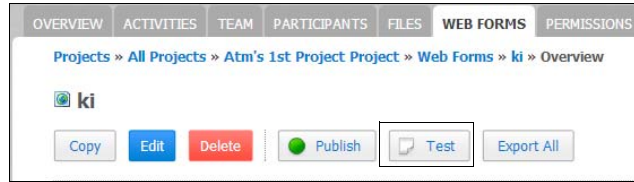
The Web Forms page opens. It displays a list the web forms for your project.



- 2 Click **View** for a web form.

The web form you selected displays.

3 On the web form page, click **Test**.



4 Respond to the questions on the web form, then click **Save Changes**.

Important: This action *tests* your changes; it does not save or update web form data.

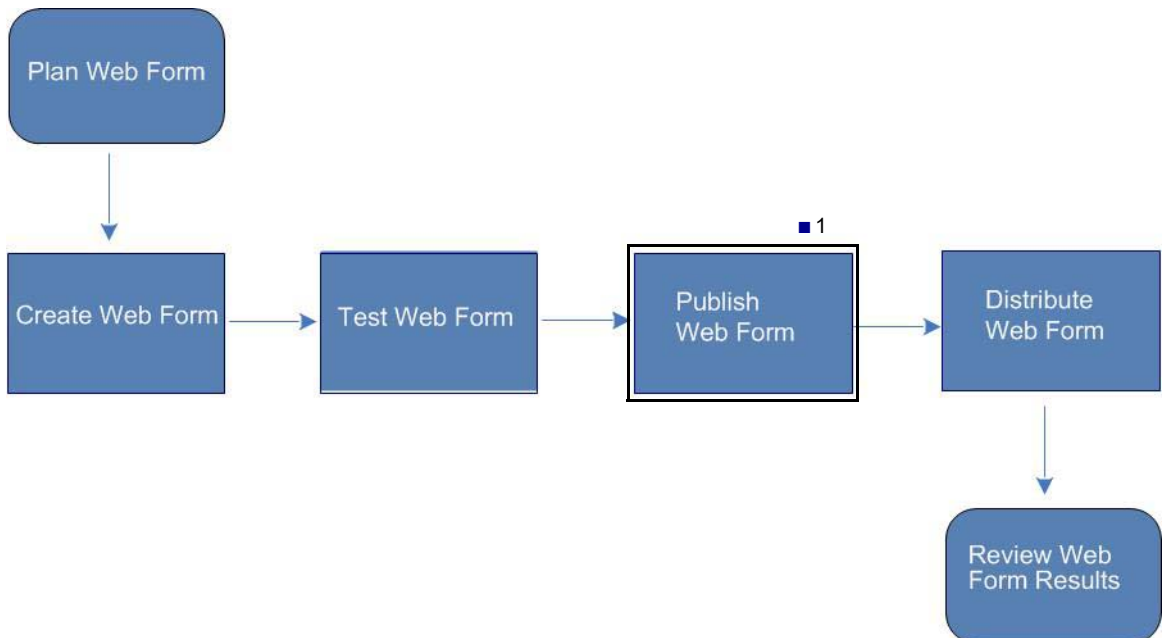
The page displays the test values you entered. Your answers are recorded in test response statistics. After you leave the page, Active Community deletes the test responses.

5 Perform the appropriate action:

To...	Do this
Modify the web form	<ul style="list-style-type: none"> Click Back, then click Edit to make your changes.
Print your responses	<ul style="list-style-type: none"> Click Print.
Publish the web form	<ul style="list-style-type: none"> Click Publish (see "Publishing a Web Form" on page 370)

Publishing a Web Form

After creating and testing a web form, publish it so it can be distributed to your partners to gather survey information.



Publish Web Form:

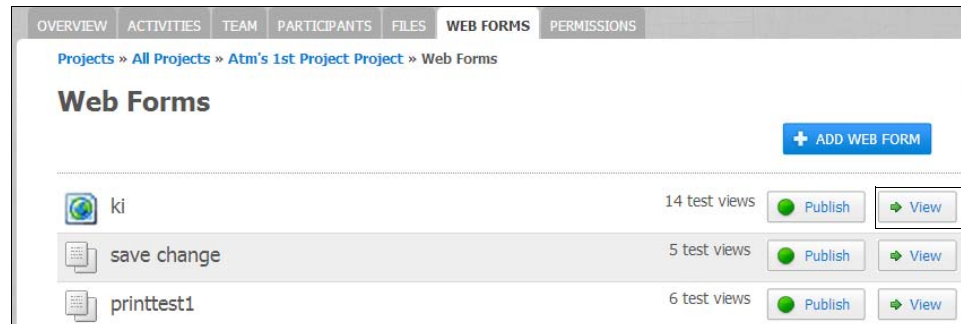
Key **Description**

1 Publish a web form so it can be distributed to contacts

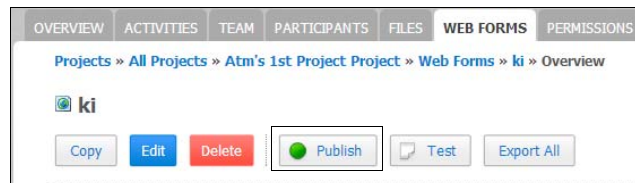
To publish a web form

- 1 Click **Projects**, open the project in which you want to publish a web form, and click the **Web Forms** tab.

The Web Forms page opens. It displays a list web forms for your project.



- 2 Click **View** for a web form.
The web form you selected opens.
- 3 On the web form page, click **Publish**.

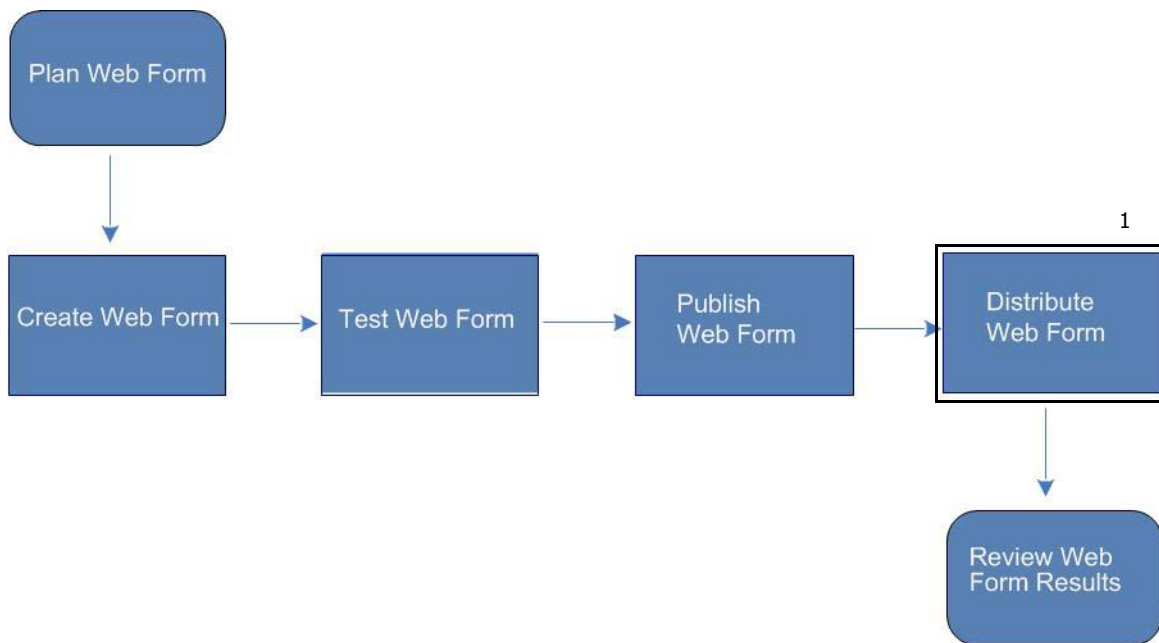


A message indicates the web form has been published. The web form can be associated with an activity in a project for web forms inside your community. For web forms for outside your community, the URL can be distributed to contacts in an email. For Public web forms, the URL displays following the row of buttons.

- 4 Go to ["Distributing a Web Form" on page 372](#).

Distributing a Web Form

The next phase of the web form setup process is to distribute it so the hub can gather contact answers to web form questions.



Distribute Web Form:

Key	Description
-----	-------------

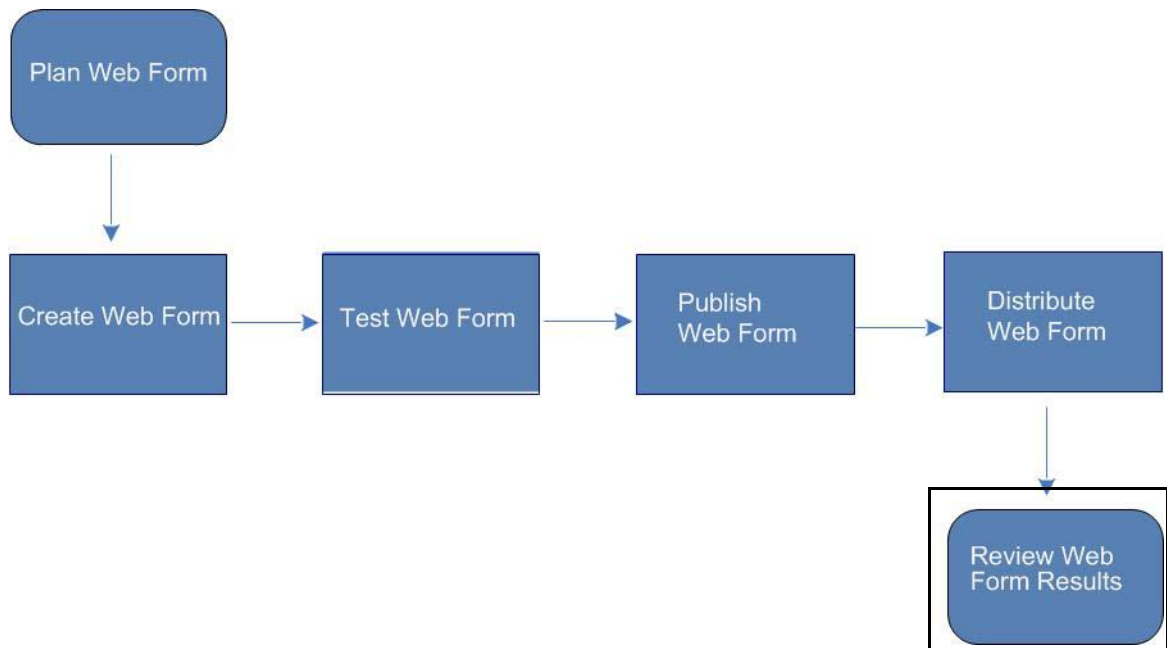
- | | |
|---|--|
| 1 | <ul style="list-style-type: none"> ■ Inside a community: Add an activity to a project and associate the web form with the activity ■ Outside a community. Send an email with the public web form URL |
|---|--|

For web forms for contacts:

- Inside an Active Community community, add an activity to a project and select the published web form. Go to [“Adding an Activity to a Project” on page 290](#).
- Outside an Active Community community, use an email to distribute the web form URL as described in [“Distributing the URL for a Public Web Form” on page 377](#).

Viewing Web Form Results

The final phase of the web form setup process is to view contact responses to web form questions.



Use this procedure to view contact responses to web form questions.

To see a summary of responses to web form questions

- 1 Click **Projects** and locate and open the project in which you want to view web form responses.
- 2 To access the web form, either:
 - a Click the **Web Forms** tab, or
 - b Click the **Activities** tab, select an activity, and click the **Web Forms** tab.
- 3 Select a web form, then click **View**.

The page shows a summary of responses by question.
- 4 To generate an Excel report of all responses, click **Export All** (see also [“Exporting Web Form Results” on page 378](#)).

Working with Web Forms

The following topics describe how to change web forms.

- “Editing a Web Form’s General Settings” on page 374
- “Adding a Logo to a Web Form” on page 374
- “Editing Web Form Questions” on page 375
- “Distributing the URL for a Public Web Form” on page 377
- “Exporting Web Form Results” on page 378
- “Responding to Web Forms” on page 379
- “Deleting a Web Form” on page 379

Editing a Web Form’s General Settings

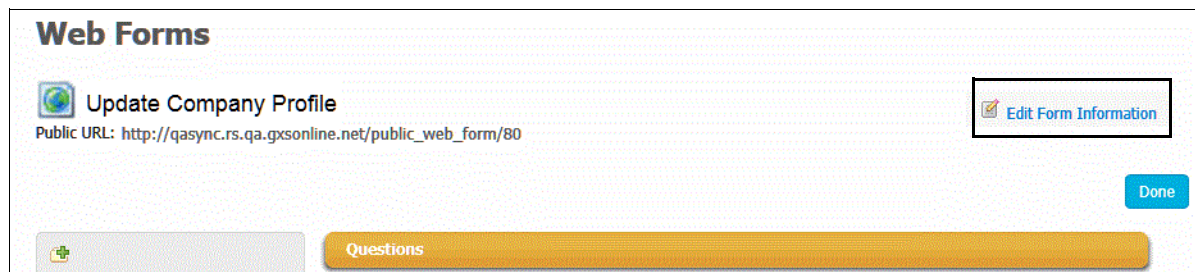
Permissions required:

- Security: Add Projects (Admin > Security Roles tab)
- Project: Web Form-related permissions (Projects > Permissions tab)

Use this procedure to edit the general properties of a web form, such as name, description, or the general settings that determine if the web form is to be used inside a community or outside a community.

To edit a web form

- 1 Click **Projects** and locate and open the project to which you want to edit a web form.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 For the web form you want to edit, click **View** > **Edit**.
- 4 Click **Edit Form Information**.



- 5 Change the name, description, and general settings as needed.
- 6 Click **Save**.

Adding a Logo to a Web Form

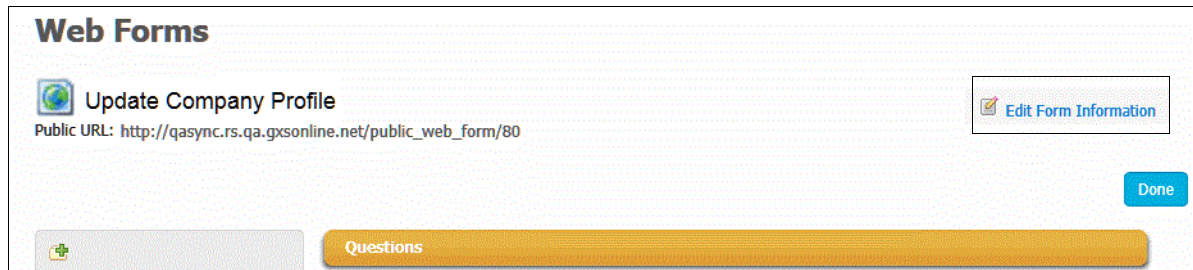
Permissions required:

- Security: Add Projects (Admin > Security Roles tab)
- Project: Add Web Form/Edit Web Form (Projects > Permissions tab)

Use this procedure to add a logo to a web form.

To add a logo to a web form

- 1 Click **Projects** and locate and open the project to which you want to add a logo.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 For the web form you want to edit, click **View** > **Edit**.
- 4 Click **Edit Form Information**.



- 5 Change the name, description, and general settings as needed.
- 6 To add a logo, click **Browse**.
- 7 In the Choose File to Upload dialog box, navigate to an image file on your hard drive (for example, .GIF), select it and click **Open**. The logo is resized (if applicable) and displayed.
Note: The maximum file size is 50 MB.
- 8 Click **Save**.

Editing Web Form Questions

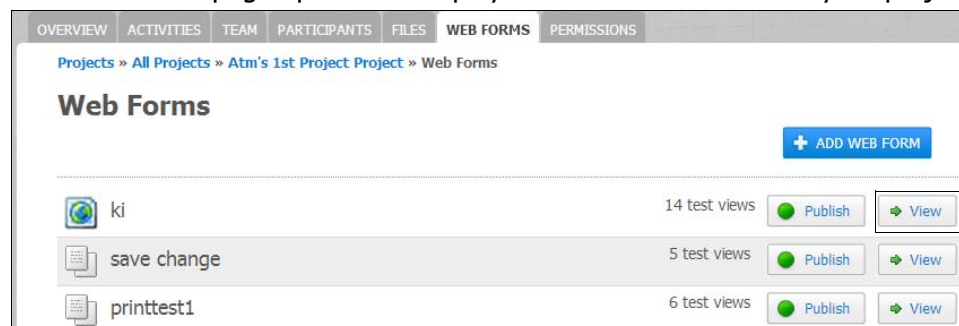
Use this procedure to edit questions in a web form. Any changes you make are reflected in the web form when a contact accesses the form. That is, if you already published and sent the web form to your partners, but they have not submitted responses, the updated web form opens when they click the link or log in to Active Community.

Note: After it has been published, a web form cannot be deleted. In addition, its general settings (community or public) cannot be changed.

To edit a web form

- 1 Click **Projects**, open the project in which you want to edit web form questions, and click the **Web Forms** tab.

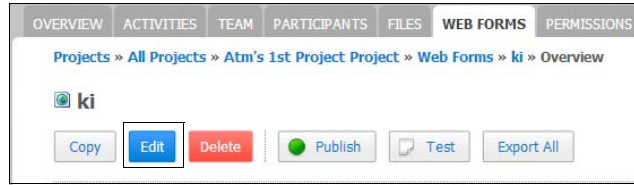
The Web Forms page opens and displays a list the web forms for your project.



- 2 Click **View** for a web form.

The web form you selected opens.

- 3 On the web form page, click **Edit**.



- 4 Click **Edit Form Information** and update the general information as described in ["Editing a Web Form's General Settings"](#) on page 374.

- 5 Click **Save Changes**.

Note: If you changed the web form's General Settings from Community to Public, all profile fields are removed.

- 6 To add or copy question groups, use the following links.

Click...	To...
Add Question Group	Add a question group to the web form. For details, see "Creating a Web Form for Inside Your Community" on page 355.
Copy Question Group	Copy a question group from a contact or company profile's custom fields (see "Copying a Custom Field Question" on page 268). Note: Option unavailable for public web forms.

- 7 To add questions to groups, use the following links.

Click...	To:	See also:
Insert Custom Field Here	Add a question before the current question.	"Adding Custom Field Questions to Groups" on page 243
Add Question	Add a question after the current question.	

- 8 To resequence, edit, or delete question groups, use the following links.

Click...	To...
Move Down/Move Up	Resequence question groups.
Select a question and drag it to a new position	Resequence questions in a group.
Edit Group	Change the name and description of the question group. Note: If the form has been published, you cannot select or deselect Display This Group as a Table.
Delete	Remove the question group from the form.

- 9 When the form is complete, click **Done**.

Your changes are saved to the web form. Any changes you made are reflected in the web form when a contact accesses the form.

Distributing the URL for a Public Web Form

Permissions required:

- Security: Add Projects (Admin > Security Roles tab)
- Project: Web Form-related permissions (Projects > Permissions tab)

Use this procedure to find a public web form URL so you can distribute it to contacts outside your Active Community community.

To distribute the URL for a public web form

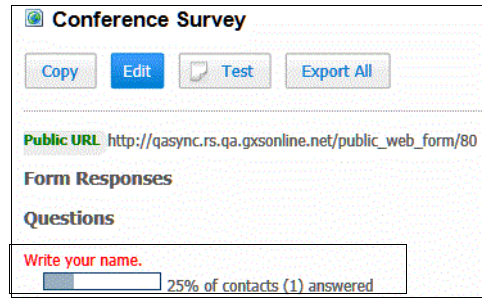
- 1 Click **Projects** and locate and open the project to which you want to edit a web form.
- 2 Select the **Web Forms** tab.
The Web Forms list page opens.
- 3 For the public web form, click **View** > **Edit**.
The URL is listed following the row of buttons on the Edit page.

- 4 Copy the URL and paste it in an email to send it to contacts outside your community.

When contacts click the link, the web form opens in Active Community so they can respond to the questions.

Important: After contacts click **Submit**, their answers are submitted to Active Community.

5 Follow steps 1 through 3 of this procedure to view the results.



6 Go to "Exporting Web Form Results" on page 378

Exporting Web Form Results

Use this procedure to export web form results to an Excel spreadsheet.

Important: Contacts can re-submit a web form until an activity is suspended or completed. For web form results that are exported to Excel, the Submitted Date column in the spreadsheet lists the most recent submitted date. The data in the spreadsheet is the most recent data.

To export web form results

- 1 Click **Projects** and locate and open the project to which you want to edit a web form.
- 2 Perform the appropriate action:

To export web form results...	Do this;
Inside a community	<ol style="list-style-type: none"> 1 Click the Activities tab. The Activities list page opens. 2 Select an activity, then click the Web Forms tab. 3 Go to step 3.
Outside a Community	<ol style="list-style-type: none"> 1 Click the Web Forms tab. The Web Forms list page opens. 2 Go to step 3.

- 3 For the web form you want to export, click **View**, then click **Export All**.
- 4 At the prompt, indicate if you want to Open or Save the results. If you click:
 - **Open**, the .xlsx file opens.
 - **Save**, navigate to a location on your computer where you want to save the file, and click **Save**.

The Excel file opens and shows the results of the web form survey.

Responding to Web Forms

Use this procedure to print responses to web form questions.

To respond to web form questions

- 1 Perform the appropriate action:

If you received...	Do this:
A web form as part of an activity	<ol style="list-style-type: none"> 1 Login to Active Community. 2 Click Home > Inbox tab. 3 Open the activity. 4 Click the link to the web form.
An email with a link to the web form	<ul style="list-style-type: none"> ■ Click the link in the email to open Active Community.

- 2 Respond to the questions in the web form. The options you see depend on the format selected when the web form was created.
- 3 Perform the appropriate action:
 - To print your responses, click **Print**.
 - To submit your responses, click **Submit**.

Your answers are submitted to Active Community.

Deleting a Web Form

Permissions required:

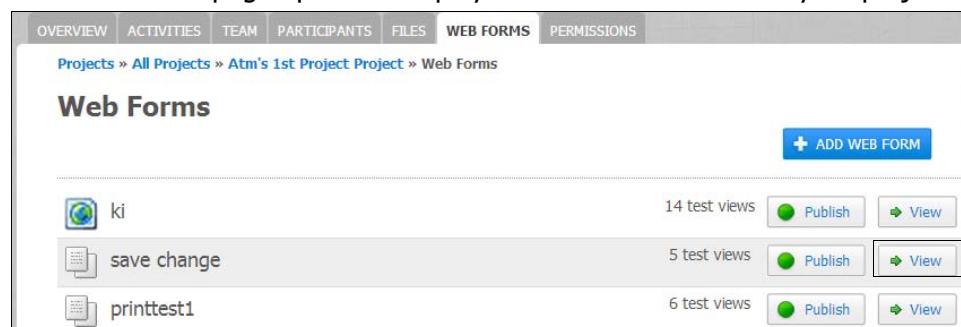
- Security: Add Projects (Admin > Security Roles tab)
- Project: Delete Web Forms (Projects > Permissions tab)

Use this procedure to delete an *unpublished* web form. After a web form has been published, it remains part of the project and cannot be deleted.

To delete a web form

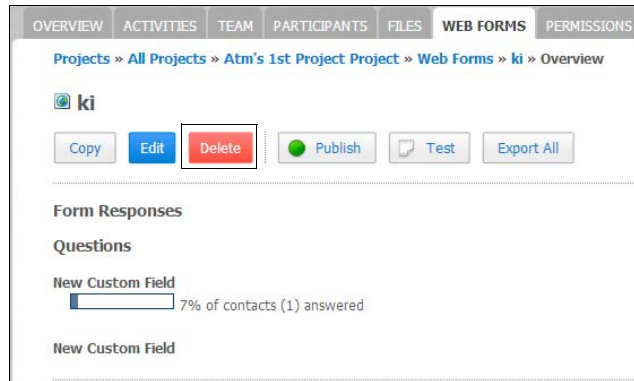
- 1 Click **Projects**, open the project in which you want to delete a web form, and click the **Web Forms** tab.

The Web Forms page opens. It displays a list for web forms for your project.



- 2 Click **View** for a web form.
The web form opens.

- 3 Select the web form you want to delete.



- 4 At the confirmation prompt, click **OK**.
Active Community removes the web form and all test responses from the project.

Active Community can send alert emails based on conditions you define in an alert configuration. Active Community checks alert conditions every hour, and sends emails as needed.

Note: Event Date alerts do not run every hour, as the other alerts do. They run at midnight Eastern Time (ET).

If an activity is associated with an alert, the alert triggers an activity email.

Topics include:

- [“Alert Components” on page 381](#)
- [“Adding an Alert Configuration” on page 387](#)
 - [“Defining Alert Triggers and Conditions” on page 389](#)
 - [“Selecting Alert Email Recipients” on page 394](#)
- [“Configuring an Alert Email Template” on page 396](#)
- [“Working with Alerts and Email Templates” on page 399](#)
 - [“Editing an Alert” on page 399](#)
 - [“Deleting an Alert” on page 400](#)
 - [“Activating an Alert Email Template” on page 400](#)
 - [“Editing an Alert Email Template” on page 401](#)
 - [“Deleting an Alert Email Template” on page 402](#)

Alert Components

An alert configuration includes the following components, which are available from the Configure Alert page (Admin > Alerts > Add New Alert).

- [“Basic Information” on page 382](#)
- [“Alert Triggers” on page 382](#)
- [“Alert Conditions” on page 383](#)
- [“Recipients of an Alert Email” on page 385](#)
- [“Email Templates” on page 386](#)

Basic Information

Basic information describes the name and description of the alert, whether the alert is active, and the type of change that triggers the alert.

The screenshot shows a form titled "Application/Profile Selected: Contact". It includes the following fields:

- Alert Name***: A text input field with the placeholder "Required Field".
- Active**: A checkbox.
- Description**: A text area.
- Trigger**: A section containing:
 - Select Trigger Type**: A dropdown menu with "Contact Profile" selected.
 - When Contact Profile is:** Two radio buttons, "Created" (selected) and "Modified".

See ["Adding an Alert Configuration" on page 387.](#)

Alert Triggers

Triggers are user actions that cause an alert email to be sent to recipients. Emails can be sent when users create or modify profiles, modify core or custom fields, or require notification of an upcoming (or past) event.

Note: An additional option (XML Push) is available for company alerts, but can only be used by OpenText Managed Services customers.

Emails are sent to users depending on the trigger type. Trigger types include:

- **Contact Profile** - Alert is sent when a contact profile is create or modified.

The screenshot shows the "Trigger" section of the configuration form:

- Select Trigger Type**: A dropdown menu with "Contact Profile" selected.
- When Contact Profile is:** Two radio buttons, "Created" (selected) and "Modified".

- **Company Profile** - Alert is sent when a company profile is created or modified.

The screenshot shows the "Trigger" section of the configuration form:

- Select Trigger Type**: A dropdown menu with "Company Profile" selected.
- When Company Profile is:** Two radio buttons, "Created" (selected) and "Modified".

- **Core and Custom Fields** - Alert is sent when a core or custom field is modified.

The screenshot shows the "Trigger" section of the configuration form:

- Select Trigger Type**: A dropdown menu with "Core and Custom Fields" selected.
- When the following field changes:** A dropdown menu with "Salutation" selected.

- Event Date - Alert is sent at a predetermined interval. For example, a hub wants to send an alert *x days before* the expiration date of a spoke's certificate (represented by a custom field).

Important: If your trigger type is an event date, the alert must have at least one date field with the Before or After operator as one of the conditions.

The screenshot shows the 'Trigger' configuration section. Under 'Select Trigger Type', 'Event Date' is selected. Below, the 'Condition(s)' section contains the instruction 'Match the following condition(s). Please select at least one (1) date field.' There are two radio buttons for 'All' and 'Any'. Below that, a condition is defined: 'Certificate - Valid Until' (selected from a dropdown), followed by the operator 'Before' (selected from a dropdown), a text input field, and the unit 'Days'.

Note: Event Date alerts do not run every hour, as the other alerts do. They run at midnight Eastern Time (ET).

- XML Push - Alert sends company profile data in XML format to a pre-configured Managed Services staging environment. Should only be used by communities that have integrated Active Community with OpenText Managed Services.

The screenshot shows the 'Trigger' configuration section. Under 'Select Trigger Type', 'XML Push' is selected. Below, there are two radio buttons: 'Profile Push' (which is selected) and 'Tabular Push'.

See [“Adding an Alert Configuration” on page 387](#) and [“Defining Alert Triggers and Conditions” on page 389](#).

Alert Conditions

Conditions are statements that describe the situations in which an alert email is sent. You use fields from company or contact profiles, or core and custom fields, to define conditions. You can:

- Match *all* or *any* condition
- Use *or* and *and* between sets of conditions
- Include the following operators (not all operators are available for all fields):
 - Contains/Does Not Contain
 - Is Equal To/Is Not Equal To
 - Is Less Than/Is Greater Than
 - Starts With/Ends With
 - Is On or Before/Is On or After
 - In Last 24 Hours
 - Changes (does not apply to the following custom fields: Text Area, File Download, Display Image, Company Link, Formula field types)

This condition allows you to be notified when specific data in your company changes in one of the following ways:

- From no value (blank) to a value (specific or non-specific)

- From a value (specific or non-specific) to another value (specific or non-specific)
- From a value (specific or non-specific) to no value (blank)
- After/Before
- All/None

Conditions can be defined individually and/or defined as *sets of* conditions.

Note: When defining alert conditions, note these differences for company and contact alerts:

- Company Alerts—only company custom fields can be used.
- Contact Alerts—company custom fields and contact custom fields can be combined to create alert conditions.

The type of alert, either company or contact, determines the custom fields that are available for selection.

Example 1 - “Is Equal To” / “Is Not Equal To” Operator

Using company profile fields, you might define this set of conditions:

- State/Province/Region Is Equal to Maryland **AND** City Is Not Equal to Baltimore.

The screenshot shows a configuration window titled "Condition(s)" with the instruction "Match the following condition(s)". It features two condition blocks. The first block has a dropdown menu set to "State / Province / Region", an operator dropdown set to "Is Equal to", and a text input field containing "Maryland". The second block has a dropdown menu set to "City", an operator dropdown set to "Is Not Equal to", and a text input field containing "Baltimore". Between the two blocks, there are radio buttons for "OR" and "AND", with "AND" selected. The interface includes "All" and "Any" buttons for each block, a "+ Add Condition Block" link at the top right, and a "- Remove Condition Block" link at the bottom right.

In the example, Active Community sends an alert email if the state is Maryland *and* the city is not Baltimore.

Example 2 - Event Date Trigger with “Before” Operator

Using a custom field with a Date format, you might define a condition that sends an alert email 30 days before the expiration date of a certificate. To accomplish this, select Event Date as the trigger, then use a custom field that represents a date, such as “Certification - Valid Until” (in this example), the Before operator, and a specified number of days, such as 30.

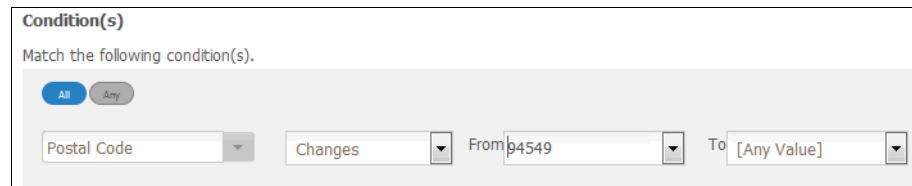
The screenshot shows a configuration window titled "Condition(s)" with the instruction "Match the following condition(s)". It features a single condition block with a dropdown menu set to "Certificate - Valid Until", an operator dropdown set to "Before", a text input field containing "30", and the word "Days" to the right of the input field. The interface includes "All" and "Any" buttons for the block.

In the example, Active Community sends an alert email if the current date is 30 days before the value in the custom field. Alert recipients will receive an alert email based on the value of the specific expiration date.

Example 3 - "Changes" Operator

Using company profile fields, you might define this condition:

- Postal Code Changes from 94549 to another value.



Condition(s)
Match the following condition(s).
All Any
Postal Code Changes From 94549 To [Any Value]

In the example, Active Community sends an alert email if the Postal Code changes from 94549 to any other value.

See ["Adding an Alert Configuration" on page 387](#) and ["Defining Alert Triggers and Conditions" on page 389](#).

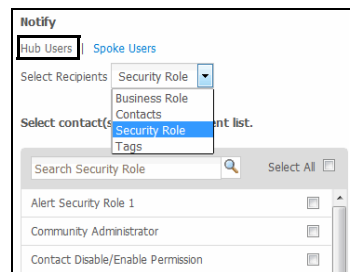
Recipients of an Alert Email

The recipients of an alert email can be hub users, spoke users, or both.

Hub Recipients

You can determine the hub recipients of an alert email based on one of the following:

- Security role (all contacts assigned to the selected Security Role receive the email)
- Business Role (all contacts assigned to the selected Business Role receive the email)
- Contacts (specific contacts receive the email)
- Tags (contacts who have the selected tag receive the email)



Notify
Hub Users Spoke Users
Select Recipients Security Role
Business Role
Contacts
Select contact(s) Security Role Contact list.
Tags
Search Security Role Select All
Alert Security Role 1
Community Administrator
Contact Disable/Enable Permission

Spoke Recipients

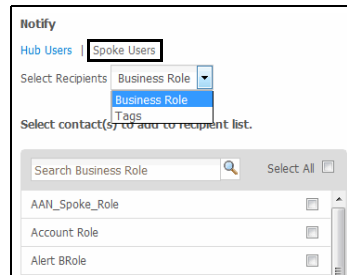
An alert can be set up to go to the spoke contact (based on business role) of the company that triggered the alert.

For example, spoke contact John Smith has a business role of Auditor. The hub creates an alert to go out to the spoke (Auditor business role)

You can determine the spoke recipients of an alert email based on one of the following:

- Business Role (all contacts assigned to the selected Business Role receive the email)

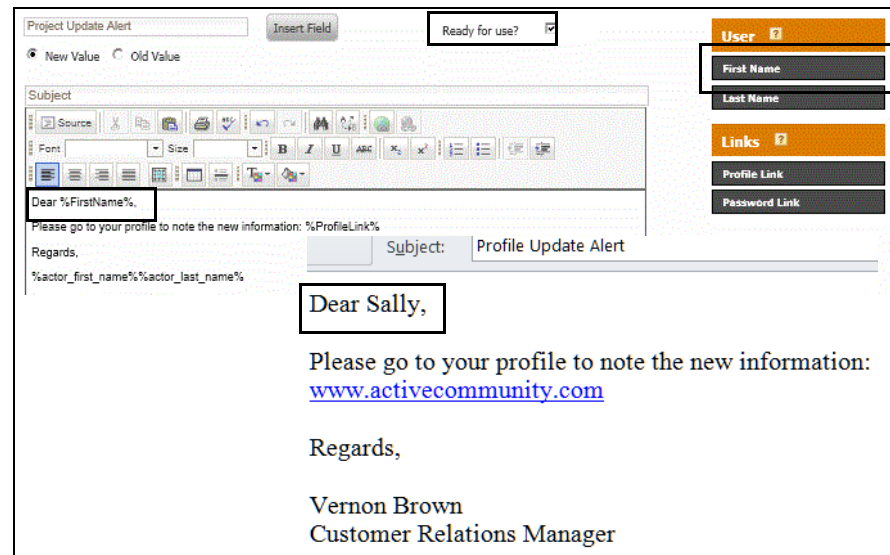
- Tags (contacts who have the selected tag receive the email)



See “Adding an Alert Configuration” on page 387 and “Selecting Alert Email Recipients” on page 394.

Email Templates

Email templates control the content and formatting in emails. The templates use *merge fields* to include values found in the recipient's company or contact profile or in custom fields. The merge field acts as a “placeholder” for profile information you want Active Community to insert in the email. For example, to insert a recipient's first name in an email, you select **First Name** when configuring an email template. The `%FirstName%` merge field is inserted in the message text. When it sends an email, Active Community uses the first name in the recipient's profile, such as John or Sally, to replace the `%FirstName%` merge field “placeholder” in the email message. Instead of “Dear %FirstName%,” the email text reads “Dear Sally.”



You can also use merge fields to indicate old and new values such as when using an alert to notify someone information has changed. For example, “John Smith changed his email address from jsmith@sample.com to john.smith@sample.com.”

Important: The **Ready for Use** check box must be selected before the email template can be selected.

See “Adding an Alert Configuration” on page 387 or “Configuring an Alert Email Template” on page 396.

Adding an Alert Configuration

Security permissions: Community or Company Permissions > Manage Alerts

Use this procedure to configure settings for an alert that sends emails based on the conditions you define.

The configuration includes the:

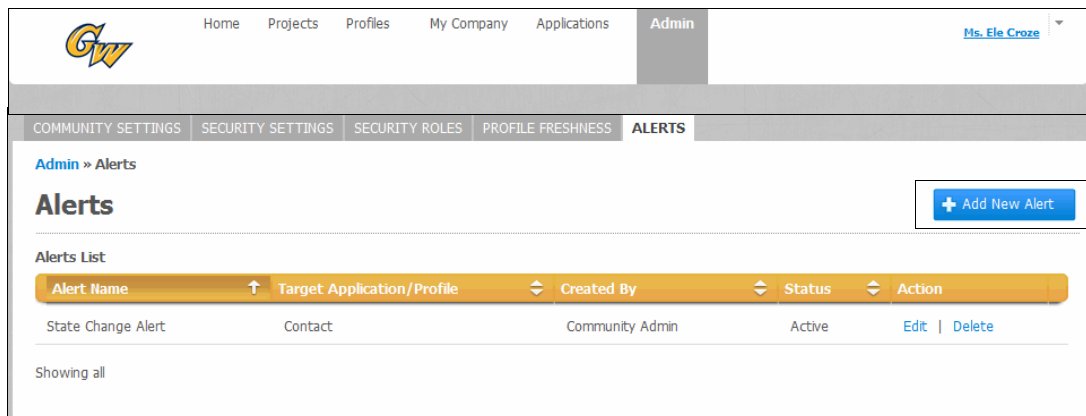
- Email template Active Community uses when the alert email is sent
- Email triggers and the conditions under which the alert email is sent
- Recipients who receive the alert email by security or business role, tags, or contacts.
- Settings related to a web form or message type of activity (optional)

Note: If an activity is associated with an alert configuration, contacts might receive two emails after alert conditions are met. One email is related to the alert configuration. The other email is related to the activity.

To add basic information about an alert

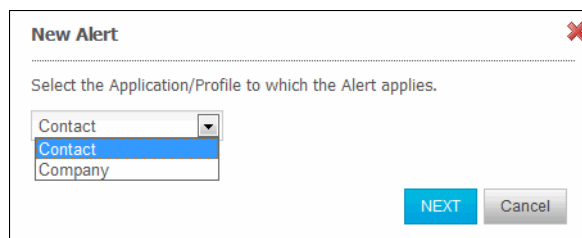
- 1 Click **Admin > Alerts** tab.

The Alerts page opens.



- 2 Click **Add New Alert**.

The New Alert dialog box opens.



- 3 Select the type of alert you want to create, **Contact** or **Company**, and click **Next**.

The Configure Alert page opens.

- 4 Type or select basic information about the alert:
 - In Alert Name, type a name for the alert.
 - In Description, type a description for the alert.
 - Scroll down to the Notify section. In Email Template, click the **Search** icon.

The Email Templates page opens.

Recent Templates:			
Name	Description	Created By	Action
Contact State Update		Community Admin	Select
State Change to Mary...	Notify recipients when State cha...	Ele Croze	Edit Delete Select
State Update Alert E...		Community Admin	Select
test		Community Admin	Select

- 5 In the Action column, click **Select** for the email template you want to use for the alert.

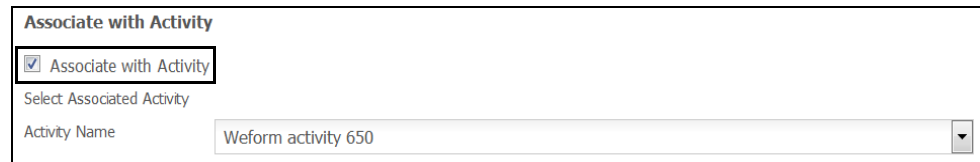
Note: If the Select link is not available, the email template cannot be selected. Ensure the **Ready for Use** check box is selected in the email template.

You return to the Configure Alert page.

- 6 To enable the alert configuration, select the **Active** check box.

Note: When an alert is active, Active Community evaluates alert conditions every hour to see if the conditions are met. If they are, it sends alert emails and/or triggers activity emails.

- To associate an activity with an alert, scroll down to the Associate with Activity section and select the **Associate with Activity** check box.



Associate with Activity

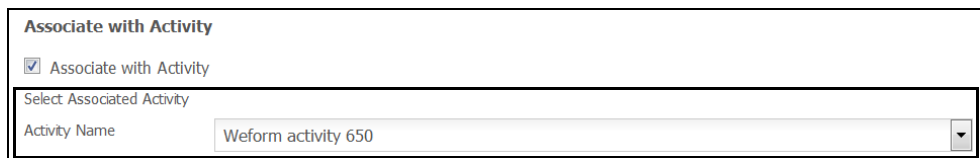
Associate with Activity

Select Associated Activity

Activity Name Weform activity 650

The Configure Alerts page refreshes with additional fields and sub-tabs.

- Under Select Associated Activity, in Activity Name, select the web form or message activity that you want to trigger an activity email if alert conditions are met.



Associate with Activity

Associate with Activity

Select Associated Activity

Activity Name Weform activity 650

- Complete the alert configuration by:
 - “Defining Alert Triggers and Conditions” on page 389
 - “Selecting Alert Email Recipients” on page 394

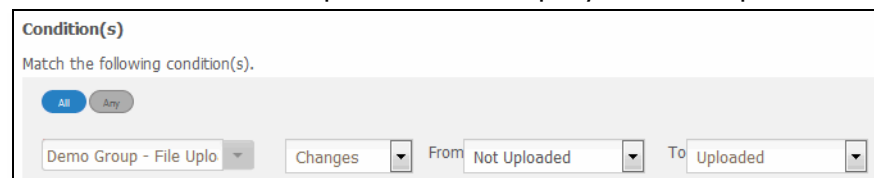
Defining Alert Triggers and Conditions

Security permissions: Community or Company Permissions > Manage Alerts

Use this procedure to define the settings for alert triggers and the conditions under which emails are sent, such as:

- Changes to contact or company profiles
- Changes to core or custom fields
- Alerts based on an event date, for example, an alert 30 days before a date custom field that might represent when a certificate expires, or an alert 10 days after a date custom field that might represent when an invoice is due.
- Alerts to send selected company profile data in XML format to Managed Services. Only available for company alerts and communities who use OpenText Managed Services.

Note: If a File Upload custom field has been created, you can select it as a custom field trigger (see “Custom Field Question Formats” on page 226). Recipients are sent an email if a file is uploaded to a company or contact profile.



Condition(s)

Match the following condition(s).

All Any

Demo Group - File Uplo Changes From Not Uploaded To Uploaded

To define alert triggers and conditions

- 1 After completing the steps in “Adding an Alert Configuration,” go to the Trigger part of the Configure Alert page.

- 2 Perform the appropriate action:

This option	Triggers an email based on	Do This:
Contact (or Company) Profile	Changes or modifications to a contact or company profile	Go to step 3.
Core and Custom Fields	Modifications to a core or custom field	Go to step 6.
Event Date	An event date	Go to step 9.
XML Push	Push data to Managed Services as an XML file. Note: The following limitations apply: <ul style="list-style-type: none"> ■ Only available for Company alerts ■ Only available for communities who use OpenText Managed Services ■ Must be configured with the assistance of Professional Services 	Go to step 10.

- 3 Select **Contact** (or **Company**) **Profile**.

- 4 Under “When Contact/Company Profile is,” select:
 - Created—Sends an email when a new contact or company is created, and one of the fields matches the conditions you set.
 - Modified—Sends an email when the conditions you define for field(s) are met. That is, one or more the fields in the profile are changed.

- 5 Go to step 12.

- 6 Select **Core and Custom Fields**.

- 7 Under “When the following field changes,” select one of the following:
 - The core or custom field you want to monitor so that an email is sent to recipients if the field changes.
 - A File Upload custom field you have created. If selected, recipients receive an email when a file is uploaded to a company or contact profile.

Note: If data masking is enabled for a company custom field and you do not have permission to view it, the field is unavailable in the drop-down list. If you later mask a custom field used in the alert, the alert configuration is *not* updated. You must edit the alert and select different conditions (see “Editing an Alert” on page 399).

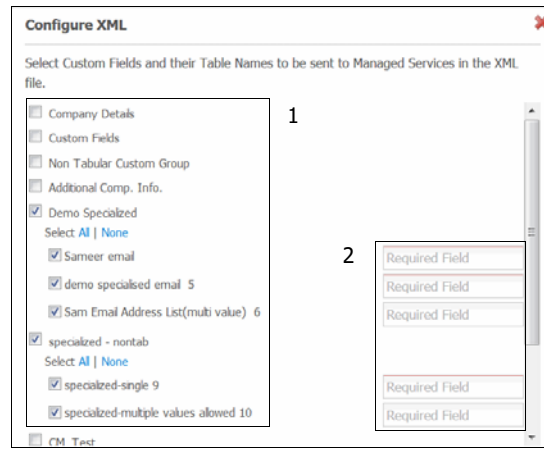
- 8 Click **Add Conditions**. Go to step 12.

- 9 Select **Event Date**. Go to step 12.

- 10 Select **XML Push**. Only available for company alerts and communities who use Managed Services.

- 11 Select one of the following options:
 - Profile Push—Allows the user to select company profile data (core/custom fields) to be pushed to Managed Services as an XML File.

- 1 In the Configure XML File section, click **Select Custom Fields**. The Configure XML dialog opens.
- 2 Select the custom fields and their table names that you want to send to Managed Services in the XML file.



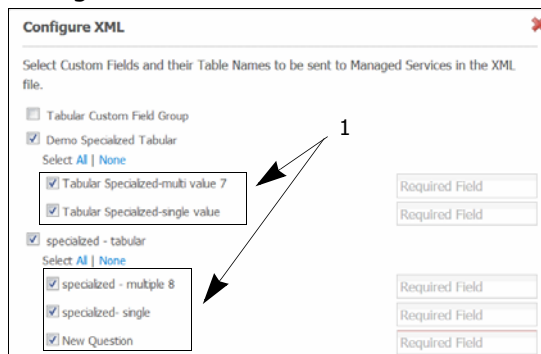
The sections on the page:

Key Description

- | | |
|---|---------------|
| 1 | Custom fields |
| 2 | Table names |

- Tabular Push—Allows the user to select ONLY custom fields which are part of a Table displayed field group to be pushed to Managed Services as an XML File.

- 1 In the Configure XML File section, click **Select Custom Fields**. The Configure XML dialog opens.
- 2 Select the custom fields and their table names that you want to send to Managed Services in the XML file.



Key Description

- | | |
|---|-----------------|
| 1 | Table data only |
|---|-----------------|

- 12 Under Condition(s), define the conditions for sending an alert email or triggering an activity email. The more conditions you use, the more conditions that must be met before an email is sent. You can define one or more

conditions, including *sets of* conditions. The type of alert, either contact or company, determines the custom fields that are available in the drop-down lists.

Note: If your trigger type is an event date, you must select at least one date field with the Before or After operator as one of the conditions.

- a Select one of the following:
 - **All** to send alert emails if *all* conditions are met.
For example, the State/Province/Region Is Equal to Maryland **AND** City Is Not Equal to Baltimore.
 - **Any** to send alert emails if *any* conditions are met.
For example, State/Province/Region Is Equal to Maryland **OR** City Is Not Equal to Baltimore.
- b When selecting conditions, note the following differences between Company and Contact alerts. The type of alert determines your action:
 - Company Alerts—only company custom fields can be used. Go to step c.

- Contact Alerts—company custom fields and contact custom fields can be combined to create alert conditions. Select **Contact** or **Company** from the drop-down list.

- c Do one of the following:
 - For Company alerts, from the drop-down list, select an option, such as State.
 - For Contact alerts—from the drop-down list, select an option, such as State.
- d In the operator drop-down list, which initially displays Contains, select the operator that describes how you want Active Community to apply the

condition, such as Contains or Is Not Equal To (not all operators are available for all fields). Your options might include:

- Contains/Does Not Contain
- Is Equal To/Is Not Equal To
- Is Less Than/Is Greater Than
- Starts With/Ends With
- Is On or Before/Is On or After
- In Last 24 Hours
- Changes (does not apply to the following custom fields: Text Area, File Download, Display Image, Company Link, Formula field types)

This condition allows you to be notified when specific data in your company changes in one of the following ways:

- From no value (blank) to a value (specific or non-specific)
 - From a value (specific or non-specific) to another value (specific or non-specific)
 - From a value (specific or non-specific) to no value (blank)
 - After/Before
 - All/None
- e In the final field or drop-down list, type or select the remaining part of the condition, such as State Is Not Equal To **California**.

f To add another row of conditions, click the + icon, and repeat steps a through e.

13 To add sets of conditions, click **Add Condition Block**, and specify additional conditions in the boxes provided.

Note: Condition blocks combine sets of conditions.

Company Alerts

Contact Alerts

- 14 Select one of the following:
 - **AND** to match *both* sets of conditions before an email is sent.
 - **OR** to match *either* set of conditions before an email is sent.
- 15 If defining conditions for a File Upload custom field, use the **Is Equal to** and **Uploaded** drop-down lists as part of the condition.
- 16 Go to ["Selecting Alert Email Recipients" on page 394](#).

Selecting Alert Email Recipients

Security permissions: Community or Company Permissions > Manage Alerts

Use this procedure to select email recipients for an alert based on roles, tags, or specific contacts. You can add multiple recipients for each available category.

To select the recipients for an alert

- 1 After completing the steps in ["Adding an Alert Configuration" on page 387](#) and ["Defining Alert Triggers and Conditions" on page 389](#), go to the Notify part of the Configure Alerts page.

- 2 If the alert:
 - Has an activity associated with it, go to step 3.
 - Does not have an activity associated with it, go to step 5.

- Under Notify, click the **Activity** sub-tab in order to send activity emails based on the alert configuration. The email can subsequently include a link to the activity for the appropriate participants to complete.

- Click the **Alert** sub-tab so recipients receive alert emails based on the configuration.

Important: If the same contacts are selected from the Alert and Activity sub-tabs, each contact receives two emails after alert conditions are met. One email is related to the alert configuration. The other email is related to the *activity*. The activity email can include a link to a form for recipients to complete.

- From the Select Recipients drop-down list, select one of the following types of recipients. Based on previous selections, all options might not be available.
 - **Business Role**—Select from all business roles defined for the community. At least one business role is required.
 - **Security Role**—Select from all security roles defined for the community.
 - **Contacts**—If available, select from all contacts in the community.
 - **Tags**—If available, select from all tags defined in the community.
- Do one or more of the following to select recipient(s) for the alert:
 - Click **Select All** to select all of the roles, contacts, or tags. Clear the check boxes for any roles, contacts, or tags you do not want to receive emails.

- To search for a contact, business or security role, or tag, in the Search box, click the **Search** icon and select the contact, role, or tag from the list.

- Select the check box for the contact, role, or tag you want to use. The contacts, roles, or tags are added to the Selected Recipients section at the bottom of the page.

7 To add contacts of a different type, repeat steps 5 and 6.

8 Click **Save**.

The alert configuration is saved, and a success message displays.

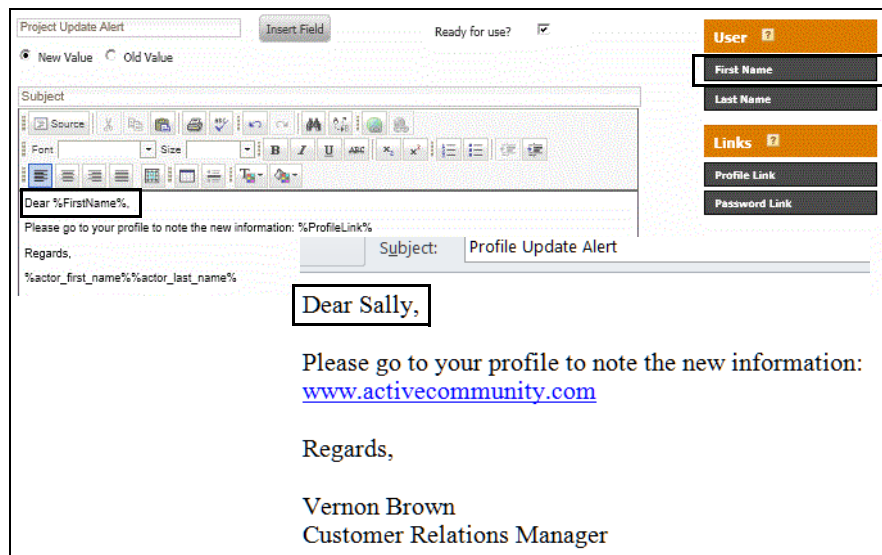
Active Community checks alert conditions on an hourly basis, and sends an email or triggers an activity email if conditions are met.

Configuring an Alert Email Template

Security permissions:

Community, Company, or Contact Permissions > Manage Alerts

Email templates, which control the content and formatting in emails, use *merge fields* to include values found in the recipient's company or contact profile or in custom fields. The merge field acts as a "placeholder" for profile information you want Active Community to insert in the email. For more information, see "Email Templates" on page 386.



After one email template has been configured, it can be copied and updated to create new templates.

Important: As described in this procedure, the **Ready for Use** check box must be selected before the email template can be selected.

To create an email template

1 Click **Admin > Alerts** tab > **Add New Alert**.

The New Alert dialog box opens.

2 Select the type of alert you want to create, **Contact** or **Company**, and click **Next**.

The Configure Alert page opens.

3 Scroll down to the Notify section.

4 In the Email Template field, click the **Search icon**.

A screenshot of a form field labeled "Email Template*" with a "Required Field" indicator. A search icon (magnifying glass) is highlighted with a red box.

The Email Template page opens.

A screenshot of the "Email Templates" page. It features a search bar, a "New Email Template" button highlighted with a red box, and a table of recent templates. The table has columns for Name, Description, Created By, and Action.

Name	Description	Created By	Action
Contact State Update		Community Admin	Select
State Change to Mary...	Notify recipients when State cha...	Ele Croze	Edit Delete Select

5 Click **New Email Template**.

The Create Email Template page opens.

A screenshot of the "Create Email Template" page. The "Name" and "Description" input fields are highlighted with red boxes. The page includes sections for "Available Merge Fields", a rich text editor for the "Subject", and a sidebar for "Recipients", "User", and "Links".

6 Type or select values in the fields:

- a In Name, type a name for the email template.
- b In Description, type a description for the email template.

7 Do one of the following:

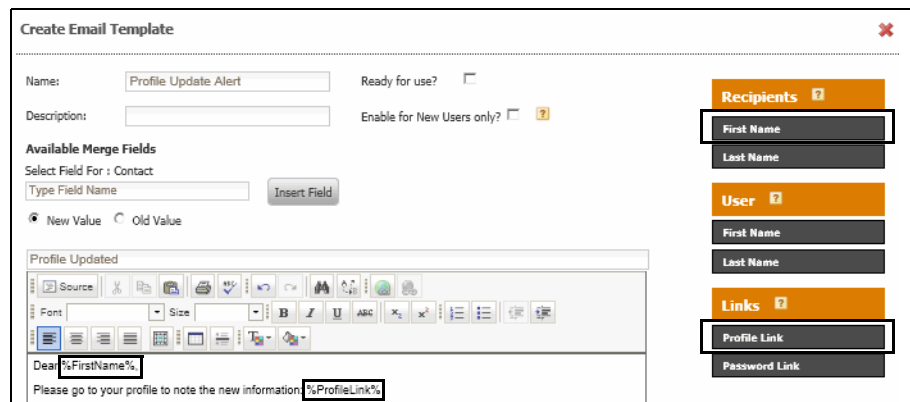
- If you are creating an email template for a company alert, go to step, 8.
- If you are creating an email template for a contact alert, select the type of merge field (**Contact** or **Company**) you want to insert into the email.

A screenshot of the "Available Merge Fields" section. It shows radio buttons for "Contact" (selected) and "Company", a "Type Field Name" input field, and an "Insert Field" button. Below are radio buttons for "New Value" (selected) and "Old Value".

- 8 To insert merge fields into the subject line or body, put your cursor where you want to insert the merge field.

Note: There are two ways to insert merge fields. You can type the name of any custom field in the text box under Available Mail Merge Fields, or you can use the Insert buttons to insert the merge fields.

- 9 To use the Available Mail Merge Fields text box, start typing the name of the field. The box automatically fills with field names that contain the characters you type, such as Email.
 - a Select a field, and click **Insert Field**.
The mail merge field displays in the body of the email.
 - b Use the Old Value option to insert an old value merge field. For example, to be notified that "John Smith changed his email address from jsmith@sample.com to john.smith@sample.com," do the following:
 - In the Email merge field, select the **Old Value** option. Active Community inserts the merge field for the old email address (%pcore_old_email%) into the template
 - In the other Email merge field, select the **New Value** option (default). Active Community inserts the merge field for the new email address (%pcore_email%) into the template.



- 10 To use the Insert buttons to insert merge fields quickly, click the buttons you want. For example:

- Recipients—Click the first and/or last name of the person to receive the alert email
- User—Click the first and/or last name of the user making the updates
- Links—Click **Profile Link** to add a link to the company or contact profile. Click **Password Link** to add a link to change a contact’s password.

Note: Passwords are not sent in emails. The email message contains a link that opens a page in Active Community (password links are *not* available for integrated communities). The recipient of the email uses the link to create a new password.

- 11 To activate the email template, select the **Ready for use?** check box at the top of the page.

Ready for use?

- 12 For contact alerts only, to send the alert email to only new users (for example, when using the alert as a type of Welcome Email), select the **Enable for New Users only?** check box.
- 13 Click **Save**.
Your email template is saved. You return to the Email Templates page.
- 14 Click the **X** to return to the Configure Alert page.

Working with Alerts and Email Templates

After email templates have been created, you can edit or delete an alert or an email template.

Topics include:

- ["Editing an Alert" on page 399](#)
- ["Deleting an Alert" on page 400](#)
- ["Activating an Alert Email Template" on page 400](#)
- ["Editing an Alert Email Template" on page 401](#)
- ["Deleting an Alert Email Template" on page 402](#)

Editing an Alert

Security permissions:

Community, Company, or Contact Permissions > Manage Alerts

Use this procedure to edit an alert configuration.

To edit an alert configuration

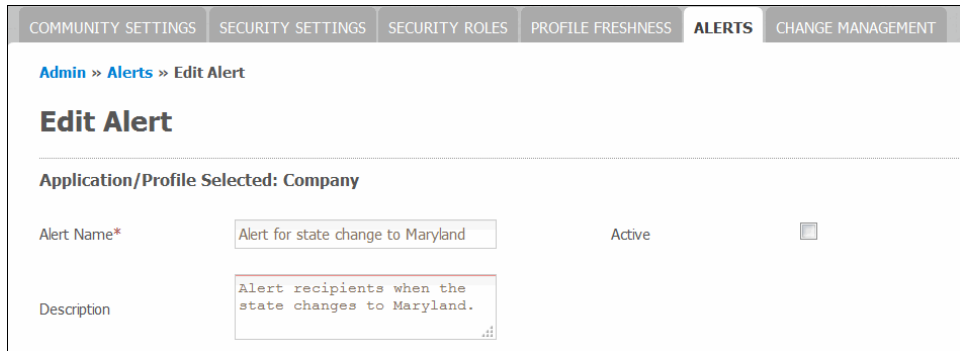
- 1 Click **Admin** > **Alerts** tab.

The Alerts page opens.

Alert Name	Target Application/Profile	Created By	Status	Action
Alert for state change to Maryland	Contact	Ele Croze	Active	Edit Delete
State Change Alert	Contact	Community Admin	Active	Edit Delete

- 2 Click **Edit** for the alert configuration you want to update.

The Edit Alert page opens.



3 Edit the fields (see “Adding an Alert Configuration” on page 387 for field descriptions).

4 Click **Save**.

The alert configuration is saved. A success message displays.

Alert conditions are checked on an hourly basis. An email is sent if the conditions are met.

Deleting an Alert

Security permissions:

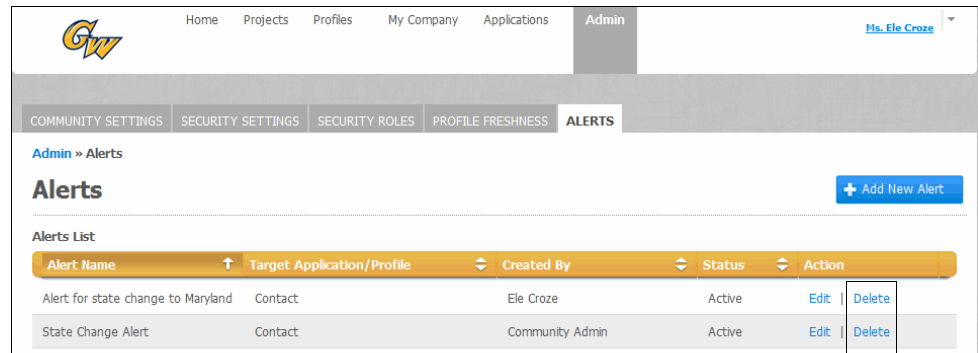
Community, Company, or Contact Permissions > Manage Alerts

Use this procedure to delete an alert configuration.

To delete an alert configuration

1 Click **Admin > Alerts** tab.

The Alerts page opens.



2 Click **Delete** for the alert configuration you want to delete.

A dialog box asks you to confirm you want to delete the alert.

3 Click **OK**.

The selected alert configuration is deleted.

Activating an Alert Email Template

Security permissions:

Community, Company, or Contact Permissions > Manage Alerts

To activate an alert email template

- Ensure the **Ready for Use?** check box is selected (see “Configuring an Alert Email Template” on page 396 or “Editing an Alert Email Template”).

Editing an Alert Email Template

Security permissions:

Community, Company, or Contact Permissions > Manage Alerts

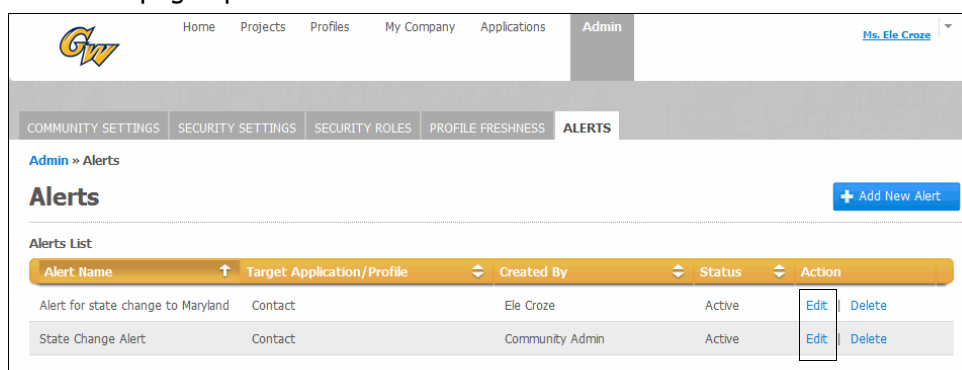
Use this procedure to edit an email template associated with an alert configuration. You can only edit email templates that you created.

Note: To quickly create a new template, save an existing template with a new name and modify it.

To edit an alert email template

- 1 Click **Admin > Alerts** tab.

The Alerts page opens.



- 2 Click **Edit** for the alert configuration you want to update.

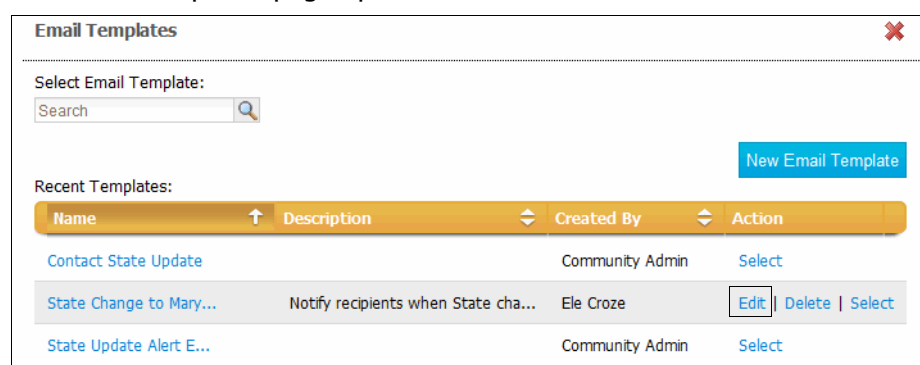
The Edit Alert page opens.

- 3 Scroll down to the Notify section.

- 4 In the Email Template field, click the **Search icon**.

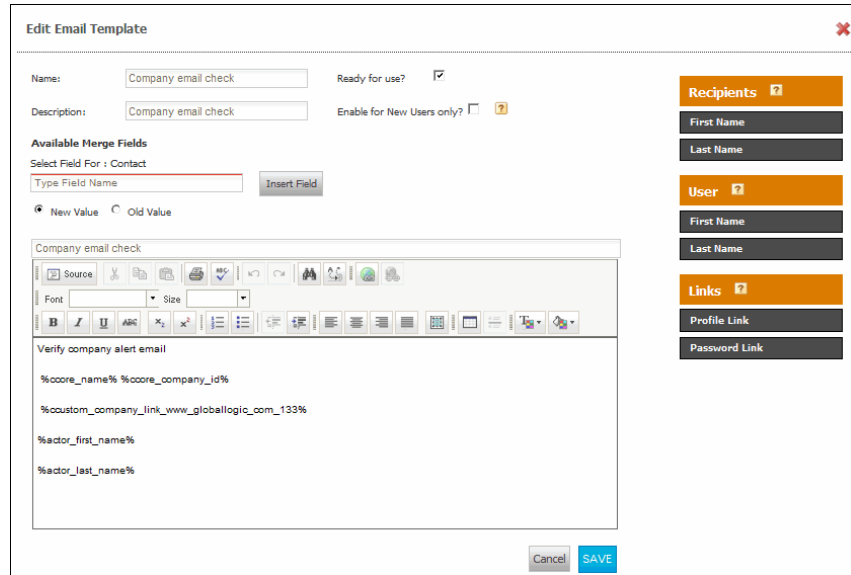


The Email Templates page opens.



- 5 Click **Edit** for the email template you want to edit.

The Edit Email Template page opens.



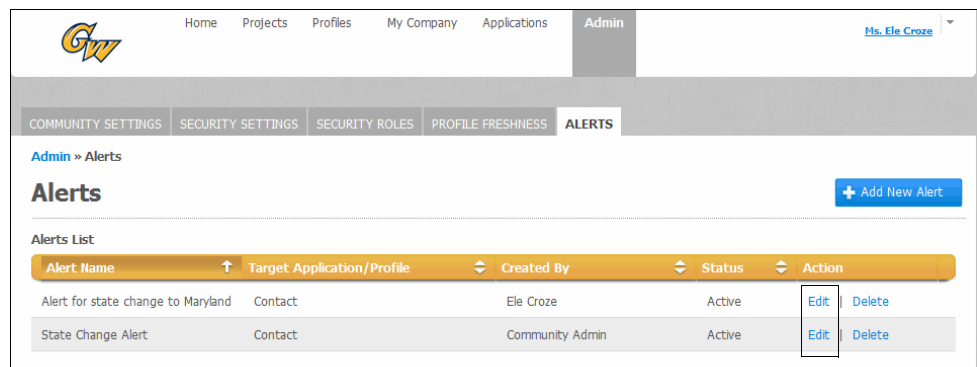
- 6 Edit the fields (see "Configuring an Alert Email Template" on page 396 for field descriptions).
- 7 Click **Save**.
Changes to the email template are saved. You return to the Email Templates page.
- 8 Click the **X** to return to the Configure Alert page.

Deleting an Alert Email Template

Security permissions:
Community, Company, or Contact Permissions > Manage Alerts
Use this procedure to delete email templates you created.

To delete an alert email template

- 1 Click **Admin** > **Alerts** tab.
The Alerts page opens.



- 2 Click **Edit** for the alert configuration you want to update.
The Edit Alert page opens.
- 3 Scroll down to the Notify section.

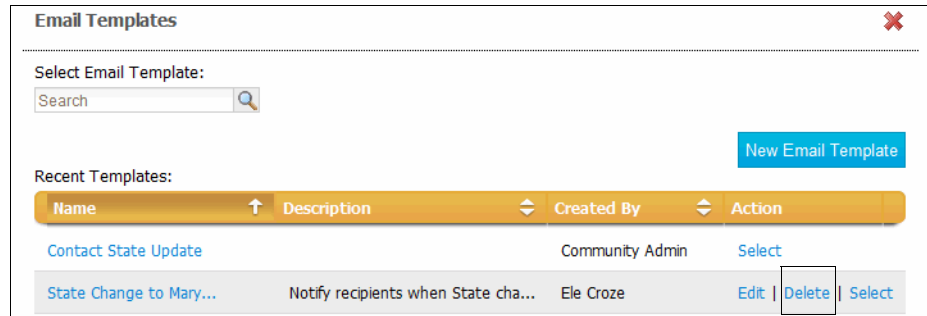
- 4 In the Email Template field, click the **Search icon**.



Notify


Email Template* *Required Field* 

- 5 In the Email Template field, click the **Search icon**.
The Email Templates page opens.



Email Templates ✕

Select Email Template:

Search 

[New Email Template](#)

Recent Templates:

Name	Description	Created By	Action
Contact State Update		Community Admin	Select
State Change to Mary...	Notify recipients when State cha...	Ele Croze	Edit Delete Select

- 6 Click **Delete** for the email template you want to delete.
A dialog box asks you to confirm you want to delete the email template.
- 7 Click **OK**.
The email template is deleted.

Active Community Change Management (CM) is a process solution designed to help hubs manage and track changes.

CM is available for company core fields as well as the following company custom fields:

- "Drop List"
- "Multiple Choice"
- "Radio Button List"
- Tax ID (EIN), ("Specialized")
- "True/False"
- "Yes/No"
- "Text"
- Email, ("Specialized")
- "Number"
- "Date"
- "Text Area"
-

A Community Administrator can create a change management process that requires approval of any change made to a company core or company custom field. Approval or rejection of the change is decided by contacts belonging to a selected business role that has been assigned as the change management approver(s).

All contacts in the business role can receive an email notification that a field change has been submitted for review. A report is available to provide the details of any change management instance, including where in the approval process the change is and who is reviewing it.

The change management process allows hubs to be alerted to, and approve or reject, changes such as:

- a spoke changing a bank account number
- a hub user changing a vendor code or ID that requires executive approval

Topics include:

- ["Change Management Overview" on page 405](#)
- ["Creating a Change Management Process" on page 409](#)
- ["Working with Change Management Processes" on page 414](#)
- ["Working with Change Management Tasks" on page 418](#)

Change Management Overview

Change Management (CM) allows you to easily:

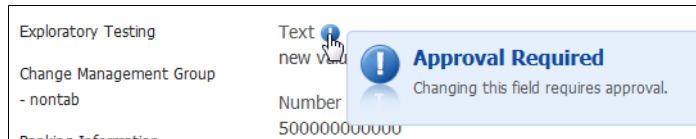
- Monitor and ensure that specific information is not changed without the proper approval (based on a business role)

- Receive notification when a company core or company custom field change has been submitted for review and when the change has been approved or rejected. One email is sent for each CM process even if multiple fields change within that process.

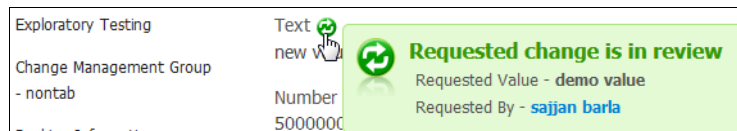
Note: Change management does not apply to all custom fields.

- Ensure (with role-based security) that the field change has been approved by the relevant personnel

If a company core or company custom field has been defined as a trigger for a change management process, the trigger field in a company profile displays an Approval Required icon and rollover text indicating that approval is required to change the field.



If you edit the company profile and change the field, the field displays an icon and rollover text indicating that the requested change is in review (the change to the field value is pending approval). The current value (if one exists) and requested value are displayed, as well as the person requesting the change.



While in review, the field can not be changed; you need to wait until the Requested change is in Review icon reverts to the Approval Required icon. This occurs after the change has been approved or rejected; the icon reverts to the Approval Required icon and the rollover text indicates that approval is required for any change to the field.

Topics include:

- ["Change Management Process" on page 406.](#)
- ["Tasks Tab" on page 407](#)
- ["Approval/Rejection of Changes" on page 407](#)
- ["Company Core and Company Custom Fields" on page 409](#)

Change Management Process

Community Administrators can create a change management (CM) process for a company core or company custom field(s). Creating a CM process includes:

- Creating a process name and description
- Selecting the field(s) and, optionally, the conditions that trigger the change management workflow
- Selecting the business role(s) that have authority to approve/reject the change
- Deciding whether approvers will be notified by email and whether they will see the original and new value(s) for the changed field(s)

Only one active CM process can exist for a specific custom field(s) at any given time. Multiple company core and company custom fields can be used to trigger a given CM process; however, once a field is used for a CM process, it cannot be used again for another CM process.

When a change is made to the field(s) that is designated to trigger the workflow, and defined conditions have been met, the CM process creates an instance of the requested change. If more than one change (for example, from different spokes) triggers the CM workflow, then more than one instance is created.

For example, each spoke may be taking action on any of a hub's 5 custom fields at a given time, so potentially there can be many instances. To the hub, each change request would appear "separate" because each spoke is separate when viewed in Active Community.

Tasks Tab

The Tasks tab (Home > Tasks) displays all open and completed change management tasks.

After a change management (CM) instance is created, an open task is created for approvers to take action on; they can approve or reject the change. The open task displays in the Open Tasks section of the Tasks tab.

Note: The Tasks tab in the user interface (UI) is the only way to approve/reject CM tasks

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	03 company	newcmp3	In Progress	Varun Lau	Release Approve Reject View

Once a CM task is complete (the proposed change(s) has been approved or rejected), the completed task displays in the Completed Tasks section.

Note: The Completed Tasks section only displays tasks that *you* have approved or rejected.

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Globallogic ...	glo_banglore	Approved	Varun Lau	View
01 S_nontabular Text	Falcons514 c...	falcons514	Approved	Varun Lau	View
01 S_nontabular Text	Cmp3832999	Cmp3832999	Approved	Varun Lau	View

Approval/Rejection of Changes

If you are a member of a business role that has been assigned to approve/reject changes associated with a change management (CM) process, your CM tasks display on the Home > Tasks tab.

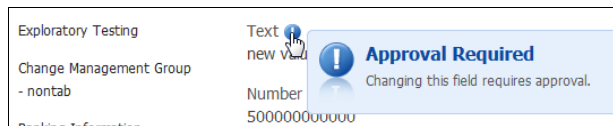
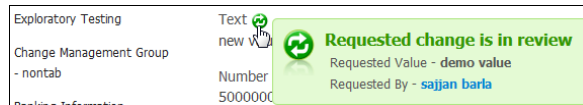
Each task consists of approving or rejecting the change. Any of the members of the assigned business role(s) can take action on a task. When a member takes action on a task, it is on a first come, first serve basis.

To take action on a task, a business role member claims the task from the queue and assumes ownership of it. If you claim a task and then decide that you do not want to assume ownership of it, you can release the task back to the queue for another member to claim.

Approvals

When a task is approved, the following occurs:

- The change(s) is approved and the task moves from the Open Tasks section to the Completed Tasks section (this section only displays tasks that *you* have taken action on).
- The person who changed the field(s) that triggered the CM workflow receives an email notification that their change was approved. At this time, notification cannot be turned off. One email is sent for each CM process approval.
- In the company profile, the field(s) is updated with the new value(s).
- In the company profile, the Requested change is in review icon and rollover text revert back to the Approval Required icon and rollover text that indicates that approval is required for any change to the field.

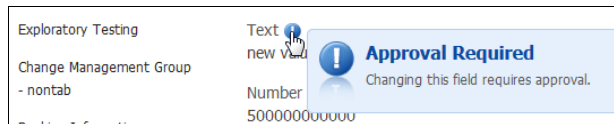
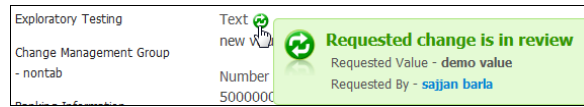


Rejections

When a task is rejected, the following occurs:

- The change is rejected and the task moves from the Open Tasks section to the Completed Tasks section (this section only displays tasks that *you* have taken action on).
- The person who changed the field(s) that triggered the CM workflow receives an email notification that their change was rejected. At this time, notification cannot be turned off. One email is sent for each CM process rejection.
- In the company profile, the field(s) retains the original value(s) and is *not* updated with the requested change(s).

- In the company profile, the Requested change is in review icon and rollover text revert back to the Approval Required icon and rollover text that indicates that approval is required for any change to the field.



Company Core and Company Custom Fields

There are a few things to be aware of when you select a company core or company custom field to be subject to change management (CM):

- In a company profile, if multiple fields are changed simultaneously, and one or more are CM-dependent fields, the non-CM-dependent fields are updated immediately when the profile is saved. The CM-dependent fields must wait for their changes to be reviewed and acted upon.
- If you copy a change management enabled custom field into a web form (from Profile), any update to the copied custom field will trigger the CM workflow before its value is committed to the profile.
- Parent-child dependent fields can be used as CM triggers. If you select a “child” field in a parent-child relationship, the “parent” field is automatically selected too.
- Multiple fields can be used as CM triggers within a CM process. If multiple dependent fields are used, they must be part of the same CM process.
- Tabular fields and tabular field groups are not supported.

Creating a Change Management Process

Security role: Community Administrator

Security permission: Change Management Permissions > Create/Edit/Delete Change Management Process

To create a change management process

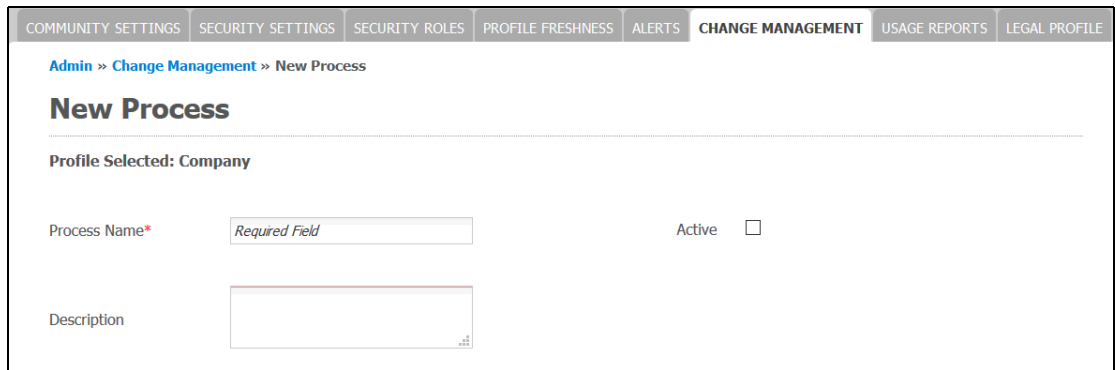
- 1 Click **Admin > Change Management** tab.

The Change Management Process page opens.



2 Click Add New Process.

The New Process page opens.



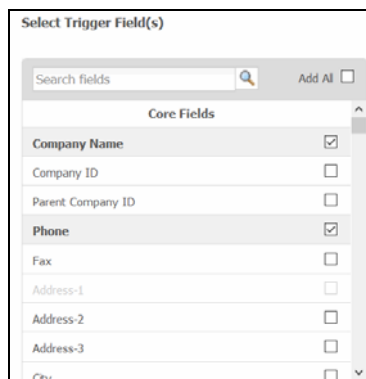
3 Under Profile Selected: Company, specify the following:

- Process Name—The name by which you want to identify this process.
- Description—A description of the process.
- To enable the change management process, select the **Active** check box.

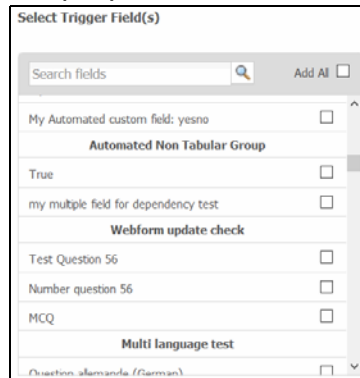
Note: When a CM process is active, change management instances will occur every time the selected field(s) (trigger field(s) selected in Step 4) is changed for any company profile.

4 Under Select Trigger Field(s), select the field(s) that you want to trigger the workflow when the field(s) changes according to the conditions you set in the next step (optional). Both company core fields and company custom fields are displayed.

- Company core fields.



- Company custom fields are organized by custom field groups.



Note the following:

- If data masking is enabled for a field, and you do not have permission to view the field, the field is unavailable and cannot be selected.
- If a field has already been used in another CM process, it is unavailable and cannot be selected.
- If you select a “child” field in a parent-child relationship, the “parent” field is automatically selected.
- Once the CM process is saved, you cannot change the trigger field(s); you must create a new CM process.

The trigger field(s) you select is displayed in the Selected Trigger Fields section. From here, you can easily remove a field by clicking the **x** by the field name.

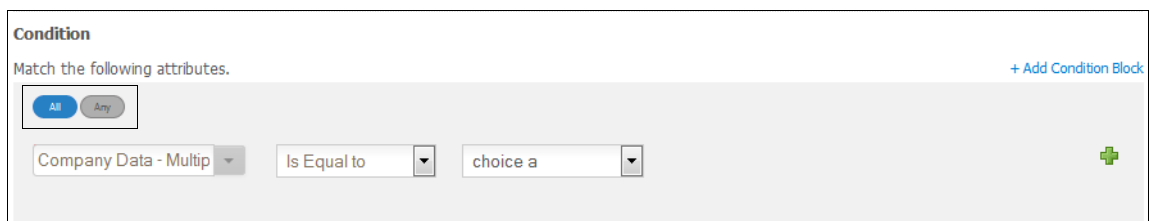


Note: If you remove the “parent” field in a parent/child relationship, the “child” field is also removed from the trigger.

- 5 Optional. Do one of the following:
 - If you do not want to set a condition, then *any* change to the trigger field starts the CM workflow. Go to [step 10 on page 413](#).
 - If you want to set a condition(s) to the trigger field, continue with [step 7 on page 412](#).

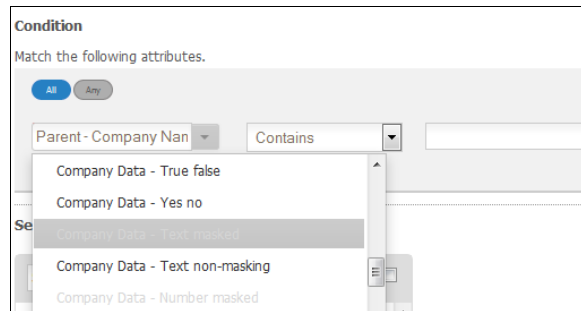
6 Click Add Conditions.

The Condition section displays.

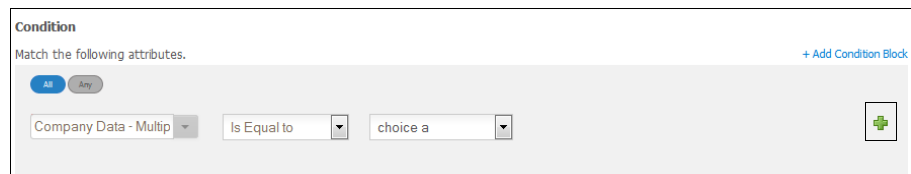


- 7 Under Condition, define the conditions for triggering a change management workflow. The more conditions you use, the more conditions must be met before a workflow is triggered. You can define one or more conditions, including *sets of* conditions.
 - a Select one of the following:
 - **All** to trigger a CM workflow if *all* conditions are met.
 - **Any** to trigger a CM workflow if *any* conditions are met.
 - b From the drop-down list, select an option, such as Company Data - Multiple choice.

Note: If data masking is enabled for a field, and you do not have permission to view the field, the field is unavailable in the drop-down list and cannot be selected.



- c In the operator drop-down list, which initially displays Contains, select the operator that describes how you want Active Community to apply the condition, such as Contains or Is Equal To. The options vary based on the field you select in the initial drop-down list. Your options may include:
 - Contains/Does Not Contain
 - Is Equal To/Is Not Equal To
 - Is Greater Than/Is Less Than
 - Starts With/Ends With
 - After/Before
 - d Based on your selection in the operator drop-down list, either type the remaining part of the condition in the text box, or select it from the drop-down list. For example, select **choice a** so the entire condition is Company Data - Multiple choice Is Equal to choice a.



- e To add another row of conditions, click the + icon, and repeat steps a through d.

- 8 To add *sets* of conditions, click **Add Condition Block**, and specify additional conditions in the boxes provided.

Note: Condition blocks combine sets of conditions.

The screenshot shows a 'Condition(s)' configuration window. At the top, it says 'Match the following condition(s)' and has a '+ Add Condition Block' button. Below this, there are two condition blocks. The first block has 'All' selected and contains two conditions: 'State / Province / Region' is 'Maryland' (operator 'Is Equal to') and 'City' is 'Baltimore' (operator 'Is Not Equal to'). The second block also has 'All' selected and contains one condition: 'Email' is 'Does Not Contain .net'. Between the two blocks, there are radio buttons for 'OR' and 'AND', with 'AND' selected. At the bottom right, there is a '- Remove Condition Block' button.

- 9 Select:

- **AND** to match *both* sets of conditions before a CM workflow is triggered.
- **OR** to match *either* set of conditions before a CM workflow is triggered.

- 10 Under Select Business Roles, select the business role(s) whose members can approve/reject any changes to the field that is triggered by the CM process.

Note: All members of a role have the same ability to approve/reject a task. The Task is approved/rejected by the first member to claim the task and act on it.

Do one or more of the following to select business role(s):

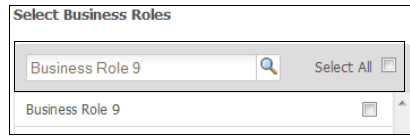
- a Select the check box for the business role whose members you want to be approvers.

The screenshot shows a 'Select Business Roles' dialog box. It has a search field labeled 'Search Role' with a magnifying glass icon and a 'Select All' checkbox. Below the search field is a list of roles with checkboxes: 'Business Role 3' (checked), 'Contact' (unchecked), and 'Business Role 1' (unchecked).

- b Click **Select All** to select all of the business roles. Clear the check boxes for any roles you do not want to be approvers.

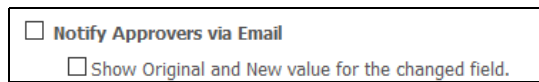
The screenshot shows the same 'Select Business Roles' dialog box. The 'Select All' checkbox is now checked. The list of roles is: 'Business Role 5' (checked), 'Business Role 2' (checked), and 'Business Role 9' (checked).

- c To search for a business role, in the Search box, type the beginning letters of the business role, and click the **Search** icon. Select the business role from the list.



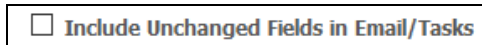
- 11 If you want approvers to receive an email when the CM workflow is triggered, select the **Notify Approvers via Email** check box. This alerts them to check the Home > Tasks tab for CM tasks they need to act on.

Note: If this check box is *not* selected, an email is not sent, and approvers must access the UI and check the Home > Tasks tab to see if there are tasks waiting for them to approve/reject.



- 12 In addition to notifying approvers that a CM task needs their attention, select the **Show Original and New Value for the changed field** check box if you want the email notification to display the original value and the new value for the field being changed.

- 13 If you want all fields that are selected as triggers for this CM process included in the alert notification email and tasks, even if the values have not changed, select the **Include Unchanged Fields in the Email/Tasks** check box. If the values have not been changed, then the old and new values displayed are the same.



- 14 Click **Save**. The CM process is created.

Working with Change Management Processes

After a change management process (CM) has been created, you can activate, edit delete, and view the details of a CM process.

Topics include:

- ["Activating a Change Management Process" on page 414](#)
- ["Editing a Change Management Process" on page 415](#)
- ["Deleting a Change Management Process" on page 416](#)
- ["Exporting a Report for Change Management Instances" on page 416](#)

Activating a Change Management Process

Security role: Community Administrator

Security permission: Change Management Permissions > Create/Edit/Delete Change Management Process

Use this procedure to activate a change management (CM) process.

Note: Only one active CM process can exist for a specific custom field(s) at any given time. Multiple company core and company custom fields can be used to trigger a given CM process; however, once a field is used for a CM process, it cannot be used again for another CM process.

To activate a change management process

- 1 Ensure the **Active** check box is selected (see "Creating a Change Management Process" on page 409).
- 2 Click **Save**.
The CM process is active.

Editing a Change Management Process

Security role: Community Administrator

Security permission: Change Management Permissions > Create/Edit/Delete Change Management Process

Use this procedure to edit a change management (CM) process.

To edit a change management process

- 1 Click **Admin > Change Management** tab.

The Change Management Process page opens.

Process Name	Trigger Field	Created By	Created On	Last Modified	Status	Action
1S_T&C Text	T&C_text	Varun Lau	12/09/2014	12/15/2014	Inactive	Edit Delete Report
1s_text2	T&C_text_NR	Sajjan Barla contact	12/09/2014	12/09/2014	Active	Edit Delete Report
Bank Account Num...	Bank Account Number	Sameer Padha	12/03/2014	12/03/2014	Active	Edit Delete Report

- 2 Click **Edit** for the CM process you want to update.

The Edit Process page opens.

Note: You cannot edit a CM process if there are active instances that are still open. Clear the Active check box to inactivate the process so that no new instances are created. You can edit the process when all open instances are complete.

Admin > Change Management > Edit Process

Edit Process

The '11company' change management process cannot be modified until all active instances are complete. Clear the Active box to inactivate the process so that no new instances are created.

Profile Selected: Company

Process Name* Active

3 Edit the fields. See “Creating a Change Management Process” on page 409 for field descriptions.

Note: You cannot change the trigger field(s) for an existing CM process; you must create a new CM process.

4 Click **Save**.

5 The CM process is saved. A success message displays.

Deleting a Change Management Process

Security role: Community Administrator

Security permission: Change Management Permissions > Create/Edit/Delete Change Management Process

Use this procedure to delete a change management (CM) process.

To delete a change management process

1 Click **Admin > Change Management** tab.

The Change Management Process page opens.

Process Name	Trigger Field	Created By	Created On	Last Modified	Status	Action
1S_T&C Text	T&C_text	Varun Lau	12/09/2014	12/15/2014	Inactive	Edit Delete Report
1s_text2	T&C_text_NR	Sajjan Barla contact	12/09/2014	12/09/2014	Active	Edit Delete Report
Bank Account Num...	Bank Account Number	Sameer Padha	12/03/2014	12/03/2014	Active	Edit Delete Report

2 Click **Delete** for the CM process you want to delete.

A dialog box warns you that deleting the process will delete all instances of the process; it asks you to confirm that you want to delete the process.

3 Do one of the following:

- Select the **Yes, I want to delete the process** check box to delete the CM process and all instances of the process. The Delete button is enabled. Click **Delete**. The selected CM process is deleted.
- Click **Cancel** to cancel the deletion request.

Exporting a Report for Change Management Instances

Security role: Community Administrator

Security permission: Change Management Permissions > Create/Edit/Delete Change Management Process

Each change management (CM) process can have multiple instances associated with it. A Community Administrator can use this procedure to export a report of open, accepted, and rejected instances associated with a particular CM process.

You can:

- View the details of each instance in a pop-up window
- Export the details of all instances to an Excel file

To export a report of change management instances

- 1 Click **Admin > Change Management** tab.

The Change Management Process page opens.

Process Name	Trigger Field	Created By	Created On	Last Modified	Status	Action
1S_T&C Text	T&C_text	Varun Lau	12/09/2014	12/15/2014	Inactive	Edit Delete Report
1s_text2	T&C_text_NR	Sajjan Barla contact	12/09/2014	12/09/2014	Active	Edit Delete Report
Bank Account Num...	Bank Account Number	Sameer Padha	12/03/2014	12/03/2014	Active	Edit Delete Report

- 2 Click **Report** for the CM process whose instance details you want to view/export.

The Report window for that instance opens.

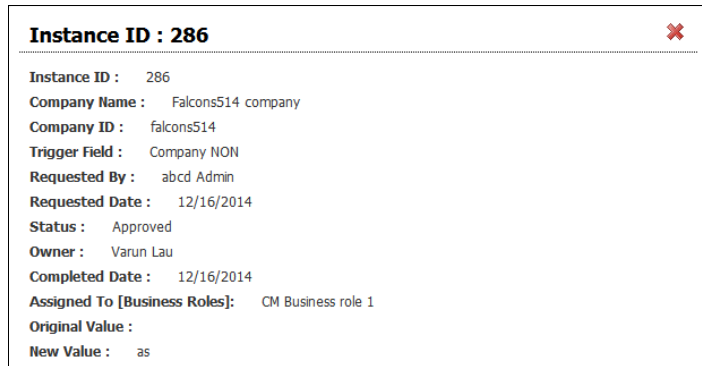
Instance ID	Company Name	Company ID	Requested Date	Status	Owner	Completed Date	Action
286	Falcons514 company	falcons514	12/16/2014	Approved	Varun Lau	12/16/2014	View
288	Falcons514 company	falcons514	12/16/2014	Approved	Varun Lau	12/16/2014	View
471	Amazon.com	amazon_id	12/18/2014	Approved	Shilpa Ahuja	12/18/2014	View
472	Amazon.com	amazon_id	12/18/2014	Approved	Shilpa Ahuja	12/18/2014	View
473	Amazon.com	amazon_id	12/18/2014	Approved	Shilpa Ahuja	12/18/2014	View
474	Amazon.com	amazon_id	12/18/2014	Open			View

(Showing all)

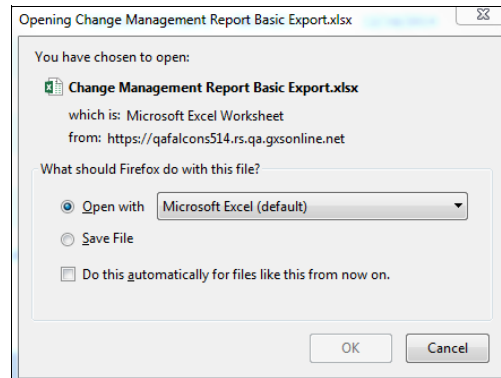
- 3 Do one of the following:

- Click **View** for the instance whose details you want to see.

A pop-up displays the details. Click the **X** to close the pop-up.



- Click **Export Report** to export the details of all instances associated with this CM process to an Excel file. A dialog box asks if you want to open or save the file. Click **OK**.



This is an example of an Excel file.

	A	B	C	D	E	F	G	H	I	J	K
1	Instance ID	Company Name	Company ID	Trigger Field	Requested By	Requested Date	Status	Owner	Completed Date	Original Value	New Value
2	286	Falcons514 company	falcons514	Company NON	abcd Admin	12/16/2014	Approved	Varun Lau	12/16/2014		as
3	288	Falcons514 company	falcons514	Company NON	abcd Admin	12/16/2014	Approved	Varun Lau	12/16/2014	as	
4	471	Amazon.com	amazon_id	Company NON	Varun Lau	12/18/2014	Approved	Shilpa Ahuja	12/18/2014		Value 1
5	472	Amazon.com	amazon_id	Company NON	Rupa Mehta	12/18/2014	Approved	Shilpa Ahuja	12/18/2014		Value 2
6	473	Amazon.com	amazon_id	Company NON	Varun Lau	12/18/2014	Approved	Shilpa Ahuja	12/18/2014	Value 2	BOFA
7	474	Amazon.com	amazon_id	Company NON	Rupa Mehta	12/18/2014	Open			Value 2	Chase

Working with Change Management Tasks

After a change management process (CM) has been created, and the conditions are met to trigger the CM workflow for the selected field, a task is opened. Approvers must take action to approve or reject the change. The task displays on the Home > Tasks tab of those users who are members of the business role(s) selected to be approvers.

Topics include:

- [“Approving/Rejecting a Change Management Task” on page 419](#)
- [“Releasing a Change Management Task” on page 421](#)
- [“Viewing Change Management Instance Details” on page 421](#)

Approving/Rejecting a Change Management Task

If you are a member of a business role that has been selected to approve/reject changes associated with a change management (CM) process, your CM tasks display on the Home > Tasks tab.

Each task consists of approving or rejecting the change. Any one of the members of the assigned business role(s) can take action on a task. This is done by claiming the task from the queue and assuming ownership of it. If you claim a task and then decide that you do not want to assume ownership of it, you can release the task back to the queue for another member of the business role(s) to claim.

To claim and approve/reject a task

- 1 Click **Home > Tasks** tab.
- 2 The Tasks page opens.

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	03 company	newcmp3	In Progress	Varun Lau	Release Approve Reject View
11 company	Amazon.com	amazon_id	Open		Claim View
12 company	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp383210	Cmp383210	Open		Claim View
14 service nontabular	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp3832987	Cmp3832987	Open		Claim View

(Showing 1 - 8 of 134 tasks)

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Globallogic ...	glo_banglore	Approved	Varun Lau	View
01 S_nontabular Text	Falcons514 c...	falcons514	Approved	Varun Lau	View
01 S_nontabular Text	Cmp3832999	Cmp3832999	Approved	Varun Lau	View

- 3 Click **Claim** for the task you want to take ownership of.

Release, Approve, Reject, and View buttons display for the task you have claimed. Your name displays as the owner of the task:

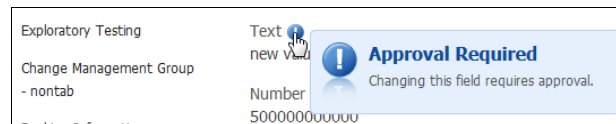
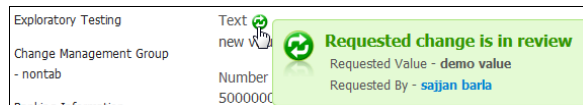


Other members of the approver business role(s) see:

- Status—In Progress
 - Owner—your name
 - Action—only the View link
- 4 Do one of the following:
 - Click **Approve**.

The following occurs:

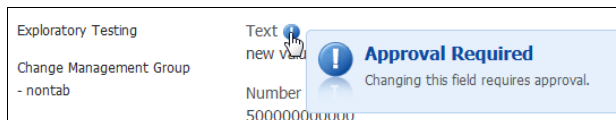
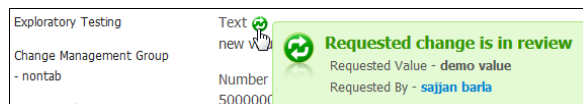
- The change is approved and the task moves from the Open Tasks section to the Completed Tasks section (this section only displays tasks that *you* have taken action on).
- The person who changed the field(s) that triggered the CM workflow receives an email notification that their change was approved. At this time, notification cannot be turned off. An email is sent for each CM process.
- In the company profile, the field(s) is updated with the new value.
- In the company profile, the Requested change is in review icon and rollover text revert back to the Approval Required icon and rollover text that indicates that approval is required for any change to the field.



- Click **Reject**.

The following occurs:

- The change is rejected and the task moves from the Open Tasks section to the Completed Tasks section (this section only displays tasks that *you* have taken action on).
- The person who changed the field that triggered the CM workflow receives an email notification that their change was rejected. At this time, notification cannot be turned off. An email is sent for each CM rejection.
- In the company profile, the field retains the original value and is *not* updated with the requested change.
- In the company profile, the Requested change is in review icon and rollover text revert back to the Approval Required icon and rollover text that indicates that approval is required for any change to the field.



Releasing a Change Management Task

If you claim a task and then decide that you do not want to assume ownership to take action on that task, you can release the task back to the queue for another member of the business role(s) to claim and act on.

To release a change management task

- 1 Click **Home > Tasks** tab.
- 2 The Tasks page opens.

Release, Approve, Reject, and View buttons display for tasks that you have claimed. Your name displays as the owner of the task.

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Falcons514 C...	falcons514	Open		Claim View
02S_tabular	Falcons514 C...	falcons514	Open		Claim View
02S_tabular	03 company	newcmp3	In Progress	Varun Lau	Release Approve Reject View
11company	Amazon.com	amazon_id	Open		Claim View
12company	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp383210	Cmp383210	Open		Claim View
14 service nontabular	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp3832987	Cmp3832987	Open		Claim View

(Showing 1 - 8 of 134 tasks)

Page 1 of 17

- 3 Click **Release** for the task you want to put back in the queue.

Release	Approve	Reject	View
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The buttons for the task change to Claim and View, and the task can now be claimed by someone else with the appropriate business role.

Claim	View
-------	------

Viewing Change Management Instance Details

You can view the details of a change management instance (open or complete task).

To view change management instance details

- 1 Click **Home > Tasks** tab.

2 The Tasks page opens.

The screenshot shows the 'Open Tasks' section of the OpenText Change Management interface. It features a table with the following data:

Approval Process Name	Company Name	Company ID	Status	Owner	Action
01 S_nontabular Text	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	Falcons514 c...	falcons514	Open		Claim View
02S_tabular	03 company	newcmp3	In Progress	Varun Lau	Release Approve Reject View
11company	Amazon.com	amazon_id	Open		Claim View
12company	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp383210	Cmp383210	Open		Claim View
14 service nontabular	Globallogic ...	glo_banglore	Open		Claim View
14 service nontabular	Cmp3832987	Cmp3832987	Open		Claim View

Below the table, it indicates '(Showing 1 - 8 of 134 tasks)' and a pagination control for 'Page 1 of 17'. Below this is the 'Completed Tasks' section, which also contains a table of completed tasks.

3 Click **View** for the instance whose details you want to see.

A pop-up displays the details. Click the **X** to close the pop-up.

The screenshot shows a pop-up window titled 'test-defaultvalues'. It displays the following details:

- Approval Process Name:** test-defaultvalues
- Company Name:** TestChangeManagement
- Company ID:** TestChangeManagement
- Status:** Approved
- Owner:** Community Admin
- Assigned To [Business Roles]:** Contact
- Trigger Field(s):** Show 5 entries

Below the details is a table with the following data:

Field Name	Original Value	New Value	Requested By	Requested Date	Completed Date
Dependent3 on Dependent2		active	Community Admin	04/04/2019	04/04/2019
droplist_dependent_default	defaultValue1	value2	Community Admin	04/04/2019	04/04/2019

At the bottom, it shows 'Showing 1 to 2 of 2 entries' and a pagination control with 'Previous', '1', and 'Next' buttons.

Note: A Community Administrator can export a report of all open, accepted, and rejected instances associated with a particular CM process. See ["Exporting a Report for Change Management Instances"](#) on page 416.

The Registration module lets a hub company register potential new suppliers in a community by sending *registration requests*. A *registration request* is an electronic form that contains information from a prospective trading partner.

After following an approval process, the trading partner information from an approved registration request is automatically added to company and contact profiles in the hub's community.

Important: Because the Registration module relies on many functions in a standard Active Community system, such as core fields, custom fields, contacts, and roles, a basic system must exist. Only then can the registration request approval process be setup.

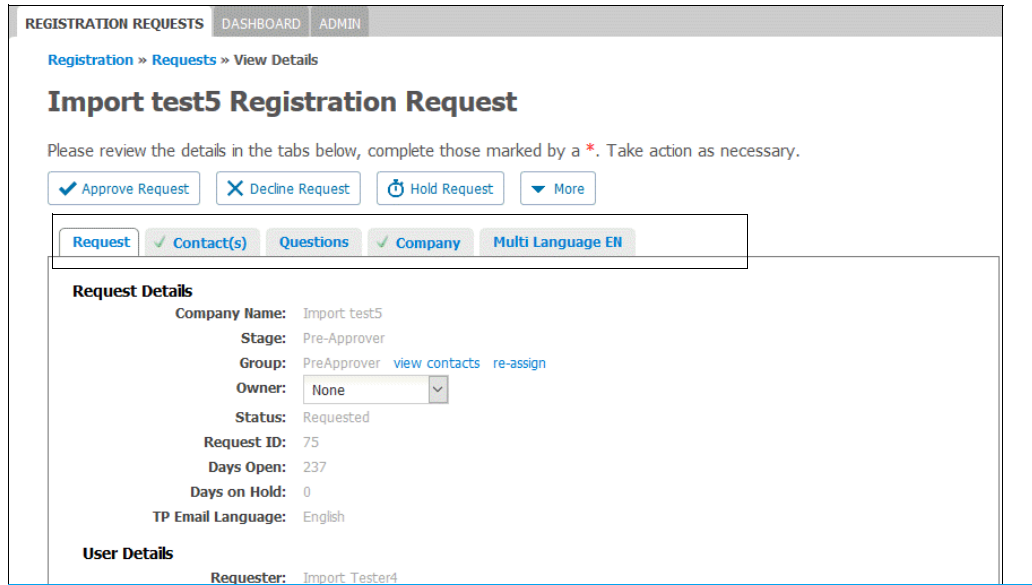
This section describes how to set up the Registration module. Topics include:

- ["Registration Setup Overview" on page 423](#)
- ["Phase 1: Plan Data to be Collected from Future Suppliers" on page 431](#)
- ["Phase 2: Design a Registration Workflow" on page 438](#)
- ["Phase 3: Customize Email Templates" on page 446](#)
- ["Phase 4: Configure Approval Levels and Groups" on page 460](#)
- ["Phase 5: Configure Other Registration Settings" on page 469](#)
- ["What's Next?" on page 475](#)

Registration Setup Overview

A *registration request* is an electronic form that contains information from a prospective trading partner. The information in the request must be approved by contacts in the hub community before the prospective supplier can be added to a community. The request is supported by a workflow that passes through several phases until the prospective trading partner is registered.

Each registration request includes tabs that contain categories of company registration information. The information can include company, contact, product, financial, and other information.



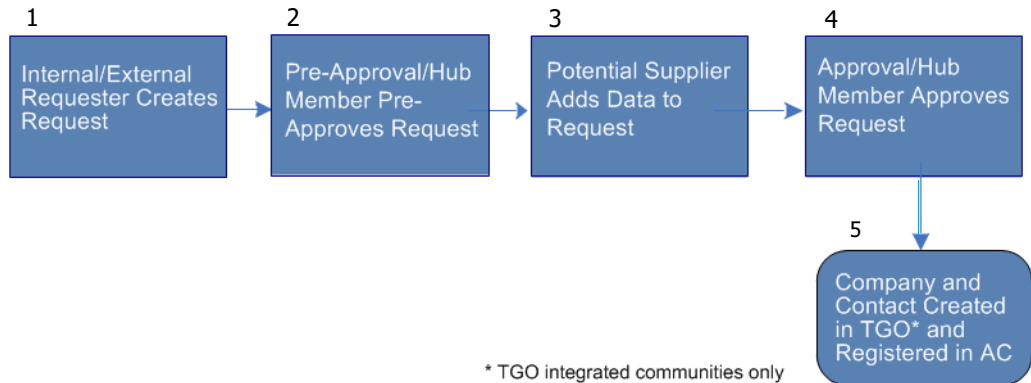
The hub customizes registration tabs to reflect information they want to collect for their community. For example, a hub might include a custom field named Terms and Conditions as a tab. Prospective suppliers must agree to the hub’s terms and conditions before they can be added to the hub’s community.

Topics include:

- [“Request Approval Process” on page 425](#)
- [“Registration Roles and Contacts” on page 425](#)
- [“Registration Email Templates” on page 427](#)
- [“Roles, Workflow Actions, and Request Buttons” on page 427](#)
- [“Registration Request Planning” on page 429](#)
- [“Registration Setup Process” on page 429](#)

Request Approval Process

A registration workflow drives the registration request approval process. For example, a registration request might follow this approval process (depending on how the registration workflow is set up).



Request Approval Process

Key	Description
1	Internal/External Requestor Creates Request
2	Pre-Approval/hub Member Pre-Approves Request
3	Potential Supplier Adds Data to Request
4	Approval/hub member Approves Request
5	Company and Contact created in TGO (only for TGO integrated communities) and Registered in Active Community

The registration workflow starts when a request is:

- 1** Submitted to the hub community by a Requester contact, such as an account manager in the hub company or a prospective trading partner.
- 2** Pre-approved by a contact in the hub community, such as a supply chain manager.
- 3** Sent to the trading partner's point-of-contact (Primary Contact) to provide supplemental information about themselves and their company.
The information might include insurance certificates, contacts in primary business roles, or payment terms.
- 4** Approved by another employee of the hub community, such as a finance manager.
- 5** After approval, for TGO integrated communities only, the trading partner is added to Trading Grid Online. In the hub's community, Active Community creates company and contact profiles for the new partner.
The newly added company or contact can be searched for and located by any member of the community.

Registration Roles and Contacts

Registration roles and contacts control the amount of information a person sees on a company registration request. The information in a request is based on a

contact's registration role or on the "part" a contact plays in the registration process. That is, the:

- Pre-Approval and Approval *roles* can be assigned to contacts in the hub community. In addition to security roles, these registration roles are assigned to contacts.
- Requesters and Primary Contacts are *contacts* inside and outside the hub community. Registration roles cannot be assigned to them.

Topics include:

- ["Requester" on page 426](#)
- ["Pre-Approval Role" on page 426](#)
- ["Primary Contact" on page 426](#)
- ["Approval Role" on page 426](#)

Note: To edit permissions for registration roles and assign roles to contacts, see ["Working with Registration Roles" on page 88](#). For a list of available permissions, see ["Registration Role Permission Descriptions" on page 89](#).

Requester

Requesters create or submit registration requests.

A Requester can be a *contact* inside or outside the hub community, such as an account manager in the hub company or a contact with a potential supplier. Requesters can be contacts with these business roles: buyer, sales representative, or supplier liaison.

Pre-Approval Role

Hub contacts in the Pre-approval role review registration requests and pre-approve them. The request then goes to the next stage in the registration process.

The Pre-Approval role can be assigned to such hub employees as category managers or buyers. Multiple Pre-Approval roles can be defined.

The hub contact must be a member of a pre-approval group.

Primary Contact

Primary Contacts receive registration requests from the hub company and complete information in the request.

A Primary Contact is the primary *contact* for a company outside the hub community.

Approval Role

Hub contacts in the Approval role validate that a Primary Contact has completed all required details in a registration request. Contacts in the role decide if they need to:

- Return the request to a Primary Contact because it contains incomplete information or
- Approve the request and register the company in their community.

Multiple Approval roles can be defined.

The hub contact must be a member of an approval group.

Registration Email Templates

Emails can be sent to all roles in the workflow, or all people involved in registration inside and outside of the hub community. They can also be sent to specific roles, such as the primary point-of-contact at the supplier.

Note: When “[Assigning Contacts to Approval Groups](#),” the Receive Emails field must be selected for users to receive emails.

Active Community uses email templates to send messages to contacts in registration roles. Standard email templates are provided and can be customized. Multiple languages are supported.

Here are the names of some standard email templates for workflow emails. Not all template names are listed.

- New Company Request
 - Copy to Requester
 - Submitted for Pre-Approval
 - Sent to Company to Complete
 - Submitted for Approval
 - Returned to Requester
 - New company request returned to all Pre-approvers
 - New company request returned to company
- New Company Request, *continued*
 - New company request declined back to Requester
 - New company request declined back to Pre-approvers
 - New company request declined back to Requester
- New Registered Company
 - Copy to Requester
 - Copy to Pre-Approvers

For all standard templates, see “[Workflow Email Templates](#)” on page 450 and “[Reminder Email Templates](#)” on page 454.

Roles, Workflow Actions, and Request Buttons

The table shows the relationship between actions selected in a registration workflow and the buttons that display (or not) in registration requests.

The last column outlines what the workflow does if contacts in a role click the button in a registration request. The button might cause the request to be returned to a different role or to different stage in the registration approval process.

For the...	If this workflow action is selected....	This button displays in a registration request...	If the button is clicked, this happens:
Requester contact			
	Re-Open	Re-Open Request	Requester contact reopens a request that was declined by a Pre-Approval role.
		Submit Request	Requester contact submits the request to the Pre-Approval role.
	Hold	Hold/Reactivate	Requestor contact puts the request on hold to obtain more information and reactivates the request when ready to continue with the request.

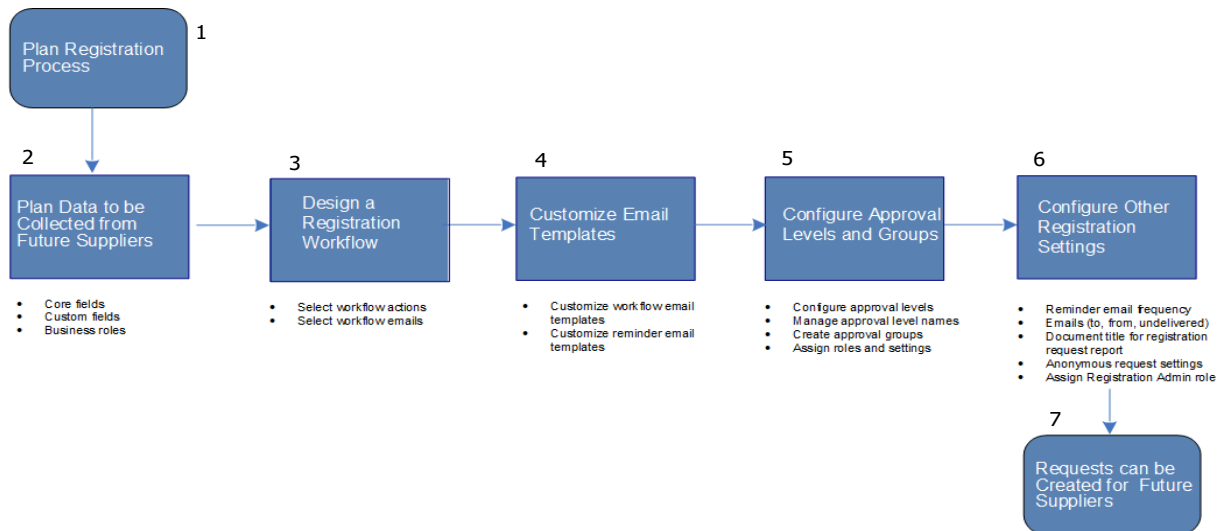
For the...	If this workflow action is selected....	This button displays in a registration request...	If the button is clicked, this happens:
Pre-Approval role (all levels)			
	Return	Return for More Information	Pre-Approval role sends request back to the Requester contact for more information.
	Decline	Decline Request	Pre-Approval role declines the request and sends it back to the Requester contact. Note: If the Re-Open action is selected in the workflow, the Requester can click Re-Open Request to reopen the request and send it back to the Pre-Approval role.
	Re-Open	Re-Open Request	Pre-Approval role re-opens a request that was declined by a company.
	Approve	Approve Request	Pre-Approval role sends request to the next level of approval (in the case of multiple levels).
	Hold	Hold/Reactivate	Pre-Approval role puts the request on hold to obtain more information and reactivates the request when ready to continue with the request approval process.
Primary Contact			
	Return	Return for More Information	Primary Contact returns the request to the Pre-Approval role for more information.
	Decline	Decline Request	Primary Contact declines the request, which is returned to the Pre-Approval role. Note: If the Re-Open action is selected in the workflow, the Primary Contact can click Re-Open Request to reopen the request and send it back the Pre-Approval role.
		Submit Request	Primary Contact submits request to the Approval role.
Approval role			
	Return	Return for More Information	Approval role returns the request to the Primary Contact for more information.
	Decline	Decline Request	Approval role declines the request and sends it back to the Requester contact.
		Approve Request	Approval role approves the request and the supplier is registered in Active Community.
		Recall Request	Recalls or withdraws a request and sends it back to the Pre-Approval stage. Information in the request can be corrected, such as an incorrect email address, and the request be resent.
	Hold	Hold/Reactivate	Approval role puts the request on hold to obtain more information and reactivates the request when ready to continue with the request approval process.

Registration Request Planning

The registration setup process requires planning on the part of the hub company. OpenText recommends the administrator at the hub work with others to design a registration request and to configure workflow, email messages, and other settings. After planning is complete, Active Community can gather information from prospective suppliers and trading partners and automatically add them to your community.

Registration Setup Process

Registration module set up involves several phases, which are listed in the graphic and in the table that follows.



Registration Setup Process

Key	Description
1	Plan Registration Process
2	Plan Data to be Collected from Future Suppliers <ul style="list-style-type: none"> ■ Core fields ■ Custom fields ■ Business roles
3	Design a Registration Workflow <ul style="list-style-type: none"> ■ Select workflow actions ■ Select workflow emails
4	Customize Email Templates <ul style="list-style-type: none"> ■ Customize workflow email templates ■ Customize reminder email templates
5	Configure Approval Levels and Groups <ul style="list-style-type: none"> ■ Configure approval levels ■ Manage approval level names ■ Create approval groups ■ Assign roles and settings

Key	Description
6	Configure Other Registration Settings <ul style="list-style-type: none"> ■ Reminder email frequency ■ Emails (to, from, undelivered) ■ Document title for registration request report ■ Anonymous request settings ■ Assign Registration Admin role
7	Requests can be Created for Future Suppliers

The table provides links to the appropriate procedures for each phase.

Choose (or use) the following options...	When you are:
"Phase 1: Plan Data to be Collected from Future Suppliers" on page 431	
Applications > Registration > Admin tab > <ul style="list-style-type: none"> ■ Core Field Settings 	<ul style="list-style-type: none"> ■ "Defining Core Fields in Registration Requests" on page 431
<ul style="list-style-type: none"> ■ TGO Invitation Codes 	<ul style="list-style-type: none"> ■ "Managing TGO Invitation Codes" on page 434
<ul style="list-style-type: none"> ■ Manage Permissions 	<ul style="list-style-type: none"> ■ "Defining Custom Field Forms in Registration Requests" on page 435
<ul style="list-style-type: none"> ■ Registration Settings 	<ul style="list-style-type: none"> ■ "Gathering Business Role Data in Registration Requests" on page 437
"Phase 2: Design a Registration Workflow" on page 438	
Applications > Registration > Admin tab > Configure Overall Workflow	<ul style="list-style-type: none"> ■ "Configuring Workflow Actions" on page 443 ■ "Configuring Workflow Emails" on page 445
"Phase 3: Customize Email Templates" on page 446	
Applications > Registration > Admin tab > <ul style="list-style-type: none"> ■ Configure Overall Workflow 	<ul style="list-style-type: none"> ■ "Customizing Workflow Email Templates" on page 456
<ul style="list-style-type: none"> ■ Registration Settings 	<ul style="list-style-type: none"> ■ "Customizing Reminder Email Templates" on page 458
<ul style="list-style-type: none"> ■ Emails in a Different (Supported) Language 	<ul style="list-style-type: none"> ■ "Configuring an Email in a Different (Supported) Language" on page 460
"Phase 4: Configure Approval Levels and Groups" on page 460	
Applications > Registration > Admin tab > <ul style="list-style-type: none"> ■ Configure Approvals 	<ul style="list-style-type: none"> ■ "Defining Approval Levels and Approval Names" on page 461 ■ "Bypassing Pre-Approval and Approval Levels" on page 468
<ul style="list-style-type: none"> ■ Manage Approval Groups 	<ul style="list-style-type: none"> ■ "Adding Approval Groups Based on Approval Levels" on page 463
<ul style="list-style-type: none"> ■ Contact Security Settings 	<ul style="list-style-type: none"> ■ "Assigning Contacts to Approval Groups" on page 464
<ul style="list-style-type: none"> ■ Map Approval Groups to Approval Roles 	<ul style="list-style-type: none"> ■ "Mapping Approval Groups to Approval Levels" on page 466
"Phase 5: Configure Other Registration Settings" on page 469	
Applications > Registration > Admin tab > <ul style="list-style-type: none"> ■ Registration Settings 	<ul style="list-style-type: none"> ■ "Defining Reminder Email Settings" on page 470
<ul style="list-style-type: none"> ■ Email Settings 	<ul style="list-style-type: none"> ■ "Configuring From, To, and Undeliverable Email Addresses" on page 472

Choose (or use) the following options...	When you are:
<ul style="list-style-type: none"> ■ Customize document title for registration request report 	<ul style="list-style-type: none"> ■ "Customize Document Title for Registration Request Report" on page 473
<ul style="list-style-type: none"> ■ Anonymous Request Settings 	<ul style="list-style-type: none"> ■ "Configuring Anonymous Request Settings" on page 473

Phase 1: Plan Data to be Collected from Future Suppliers

The first phase in the registration setup process is to define the information you want to collect from prospective suppliers.



Phase 1: Plan Data to be Collected from Future Suppliers

Key Description

- | | |
|---|---|
| 1 | <p>Plan Data to be Collected from Future Suppliers</p> <ul style="list-style-type: none"> ■ Core fields ■ Custom fields ■ Business roles |
|---|---|

Topics include:

- "Defining Core Fields in Registration Requests" on page 431
- "Managing TGO Invitation Codes" on page 434
- "Defining Custom Field Forms in Registration Requests" on page 435
- "Gathering Business Role Data in Registration Requests" on page 437

Defining Core Fields in Registration Requests

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to define which company and contact core fields you want to include in a registration request. Core fields provide basic information about a company or contact. The administrator can also select when required core fields

(both company and contact fields) become mandatory (for example, at what stage).

Fields that are required, display an asterisk during registration. Fields that are not required, do not display an asterisk.

To define core fields in registration requests

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Core Field Settings** link.

The Registration Core Fields page opens to Company in Registration link.

Registration > Admin >> Core Fields

Registration Core Fields

Company in Registration | [Contact in Registration](#)

Please select the core fields that are required for a Company in Registration.
Fields that are always required are checked and disabled.

Title	Required	Required Stage	
Name	<input checked="" type="checkbox"/>	Requestor	
Company ID	<input checked="" type="checkbox"/>	Approver	Select Field <input type="text" value=""/>
Web Site	<input type="checkbox"/>		
Email	<input type="checkbox"/>		
Phone	<input checked="" type="checkbox"/>	Pre-Approver	
Fax	<input type="checkbox"/>		
Address	<input checked="" type="checkbox"/>	Pre-Approver	
Address 2	<input type="checkbox"/>		
Address 3	<input type="checkbox"/>		
City	<input checked="" type="checkbox"/>	Pre-Approver	
State / Province / Region	<input checked="" type="checkbox"/>	Pre-Approver	
Postal Code	<input checked="" type="checkbox"/>	Pre-Approver	
Country	<input checked="" type="checkbox"/>	Pre-Approver	
# Employees	<input type="checkbox"/>		
Notes	<input type="checkbox"/>		
TGO Service	<input checked="" type="checkbox"/>	Pre-Approver	Add New Invitation Code Show Invitation Codes

Note: For TGO integrated communities, the Address, State, Postal Code, Country, and TGO Service fields are checked by default and cannot be cleared.

- 3 Select the check boxes for the *company* core fields you want included in the registration request. The Required Stage drop-down list displays if a check box is selected.

Note: If a check box is de-selected or cleared, it means the field is optional. Some fields cannot be de-selected or cleared because they are always required.

- 4 From the Required Stage drop-down list, select the approval stage for which you want this field to be required.

The default stage is the first available stage of registration, but administrators can change the stage to a later one; after a selection is made, the asterisk that indicates a field is mandatory displays for the field.

Note: The selections in the drop-down list vary depending on the number of approval levels you selected on the Configure Approval page (see ["Defining Approval Levels and Approval Names" on page 461](#)).

- 5 Optional. If you want the Company ID to be populated with a specific custom field value, select the custom field from the second drop-down list for the Company ID field.

The screenshot shows a configuration form with several fields: Name, Company ID, Web Site, Email, Phone, and Fax. Each field has a 'Required Stage' dropdown menu. The 'Company ID' dropdown is open, showing a list of custom fields. The 'Company Data - DUNS Number' field is highlighted in blue. Other fields in the list include 'Company Data - New Question', 'test 11 Custom Field Group - text (dependent)', 'test 11 Custom Field Group - number (default answer)', 'test 11 Custom Field Group - text (enable masking)', 'test 11 Custom Field Group - number', 'company non tab1 - nontab - number - limit 6', 'company non tab1 - nontab - text', and 'company non tab1 - nontab - number'.

Note: Custom fields can only be selected if they are Number, Text, or Specialized (Tax ID) custom fields and if they do *not* have any of the following options enabled: Enable Masking, Set Default Answer, and Make Dependent on Another Question.

See ["Set a Custom Field as the Company ID" on page 233](#).

- 6 TGO Service field is required for TGO integrated communities. Active Community uses Trading Grid Online (TGO) invitation codes to automatically provision a Trading Partner (registration request) with a TGO service (for example, Intelligent Web Forms (IWF), Active Orders (AO), or Active Invoices with Compliance (AIC)).

To add or view invitation codes, see ["Managing TGO Invitation Codes" on page 434](#).

- 7 At the top of the page, click the **Contact in Registration** link.
- 8 Select the check boxes for the *contact* core fields you want to included in the registration request. The Required Stage drop-down list displays if a check box is selected.

Note: If a check box is de-selected or cleared, it means the field is optional. Some fields cannot be de-selected or cleared because they are always required.

- 9 From the Required Stage drop-down list, select the approval stage for which you want to require this field.

The default stage is the first available stage of registration, but administrators can change the stage to a later one; after a selection is made, the asterisk that indicates a field is mandatory displays for the field.

Note: The selections in the drop-down list vary depending on the number of approval levels you selected on the Configure Approval page (see ["Defining Approval Levels and Approval Names" on page 461](#)).

- 10 Click **Save** to save the settings.

Your settings are reflected in the registration request.

Managing TGO Invitation Codes

Security roles: Registration Administrator

Trading Grid Online (TGO) invitation codes are required for provisioning a Trading Partner (registration request) with a TGO application such as Intelligent Web Forms (IWF), Active Orders (AO), or Active Invoices with Compliance (AIC)).

You can obtain your company’s TGO invitation code from your Implementor or by contacting your OpenText program manager.

Use this procedure to:

- Add a TGO invitation code that can be selected from a drop-down list on the registration request.
- View a list of existing TGO invitation codes.

To add or view TGO invitation codes

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Core Field Settings** link.

The Registration Core Fields page opens to Company in Registration link.

Registration > Admin > Core Fields


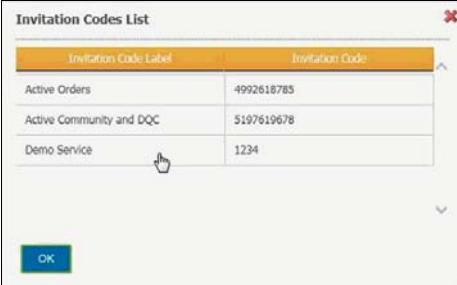
Registration Core Fields

Company in Registration | [Contact in Registration](#)

Please select the core fields that are required for a Company in Registration.
Fields that are always required are checked and disabled.

Title	Required	Required Stage	
Name	<input checked="" type="checkbox"/>	Requester	
Company ID	<input checked="" type="checkbox"/>	Approver	Select Field <input type="text" value=""/> <input type="button" value=""/>
Web Site	<input type="checkbox"/>		
Email	<input type="checkbox"/>		
Phone	<input checked="" type="checkbox"/>	Pre-Approver	
Fax	<input type="checkbox"/>		
Address	<input checked="" type="checkbox"/>	Pre-Approver	
Address 2	<input type="checkbox"/>		
Address 3	<input type="checkbox"/>		
City	<input checked="" type="checkbox"/>	Pre-Approver	
State / Province / Region	<input checked="" type="checkbox"/>	Pre-Approver	
Postal Code	<input checked="" type="checkbox"/>	Pre-Approver	
Country	<input checked="" type="checkbox"/>	Pre-Approver	
# Employees	<input type="checkbox"/>		
Notes	<input type="checkbox"/>		
TGO Service	<input checked="" type="checkbox"/>	Pre-Approver	Add New Invitation Code Show Invitation Codes

3 Perform the appropriate action.

To...	Do this:
Add a TGO invitation code	<p>1 Click Add New Invitation Code. The Add New Invitation Code pop-up opens.</p>  <p>2 In Invitation Code Label, type a name for the invitation code.</p> <p>3 In Invitation Code, type a code for the invitation code.</p> <p>4 Click Save. The invitation code is added.</p>
View a list of existing TGO invitation codes	<p>1 Click Show Invitation Codes. The Invitation Codes List pop-up opens.</p>  <p>2 When you are done viewing the list, click OK.</p>

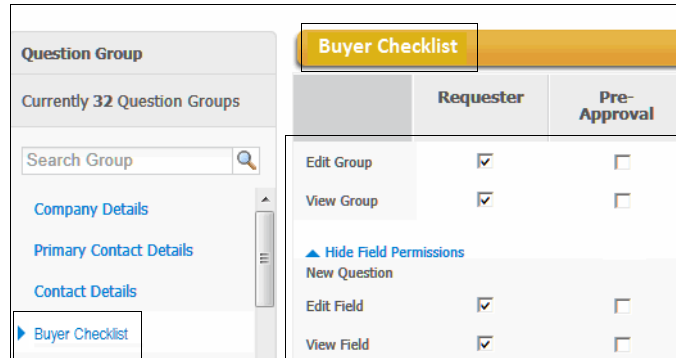
Defining Custom Field Forms in Registration Requests

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to control which custom field groups are included in a registration request. In the request, each custom field group is displayed as a tab. You select the custom field groups that can be viewed or edited by each registration role. By doing so, contacts in a role might not be able to view a particular tab (for example, the Questions tab).

For example, you want the Requester contact (a buyer or sales representative) to view and edit custom fields in a Buyer Checklist tab. You do not want contacts in the Pre-Approval role (procurement) to be able to see the same tab. The following

settings would allow Requester contacts to see the tab, but not contacts in the Pre-Approval role.



Important: Custom field information shown in request tabs is displayed or hidden based on selections in View/Edit Group or Field as described in this procedure.

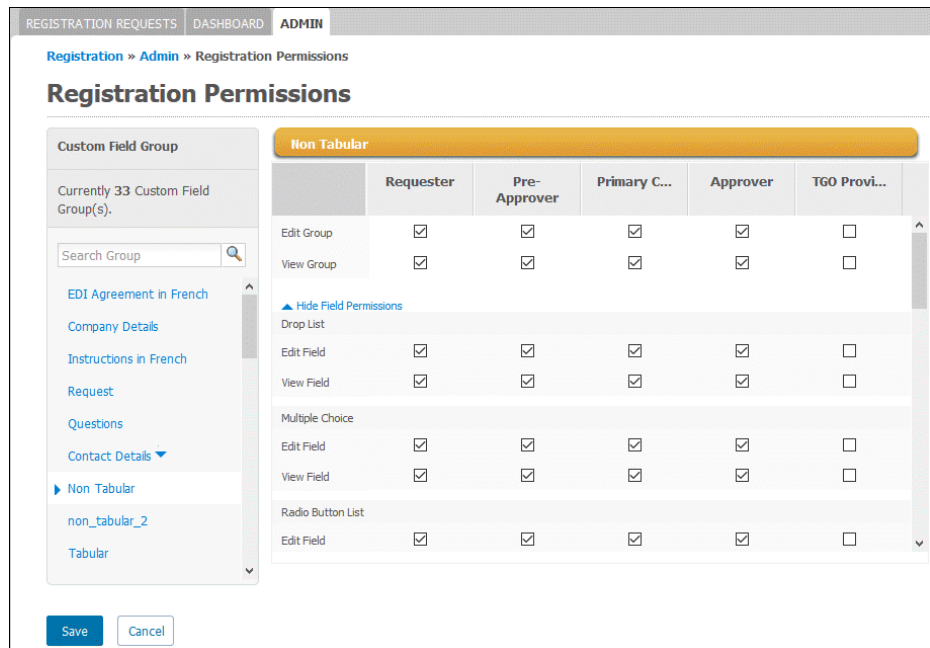
To define custom fields for registration requests

- 1 Click **Applications > Registration > Admin** tab.

The Registration Setup page opens.

- 2 Click the **Manage Permissions** link.

The Registration Permissions page opens.



- 3 For each custom field group, select or clear the check boxes for the tabs or fields you want registration roles and contacts to view or edit on a registration request.

Note: The Primary Contact Details field group (tab) is now nested under the Contact Details field group (tab).

- 4 Change the tab order of the custom and core field groups, as needed, by clicking a field group (tab) and dragging it up or down with your cursor, then releasing the cursor.
- 5 Click **Save**.

Gathering Business Role Data in Registration Requests

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to collect information about people in business or functional roles during the registration process. For example, you might want to collect the name, email address, and phone number of a supplier's chief financial officer, supply chain manager, and distribution manager.

When the request is approved and the supplier is registered in your community, the business role information is available to you in contact profiles.

To collect business role data in registration requests

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Registration Settings** link.

The Registration Settings page opens.

- 3 In the Contact Collection part of the page, indicate which business roles you want to collect from prospective suppliers during the registration process. If you select:

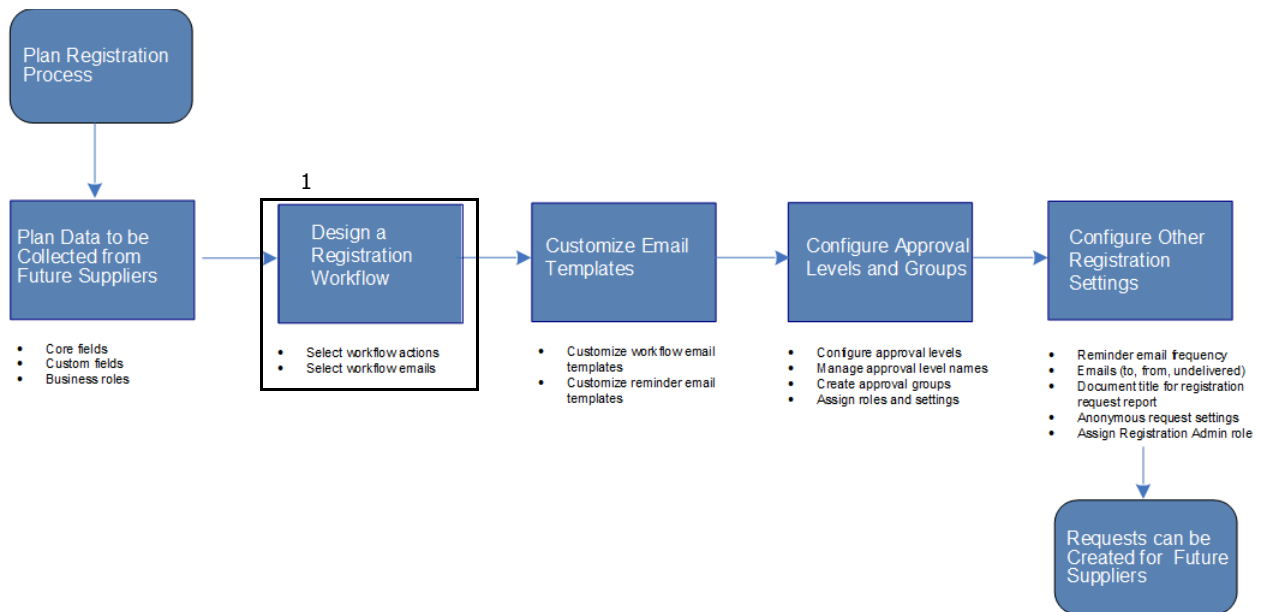
- Required—Prospective suppliers *must* provide information for at least one person for each role in the request. If they do not, their request cannot be submitted for approval.
- Not Required—Prospective suppliers *can* provide the role information, but it is not required. If they do not, their request *can* be submitted for approval.
- Optional—Prospective suppliers have the option of providing the information. Their request can be submitted for approval with or without the information.

4 Click Save.

You have saved settings for contact role collection in a registration request.

Phase 2: Design a Registration Workflow

The second phase in the registration setup process is to define the registration workflow for the hub community. Active Community provides a pre-configured workflow. The workflow can be customized to meet the hub’s business needs (see “Registration Request Planning” on page 429).



Phase 2: Design a Registration Workflow

Key Description

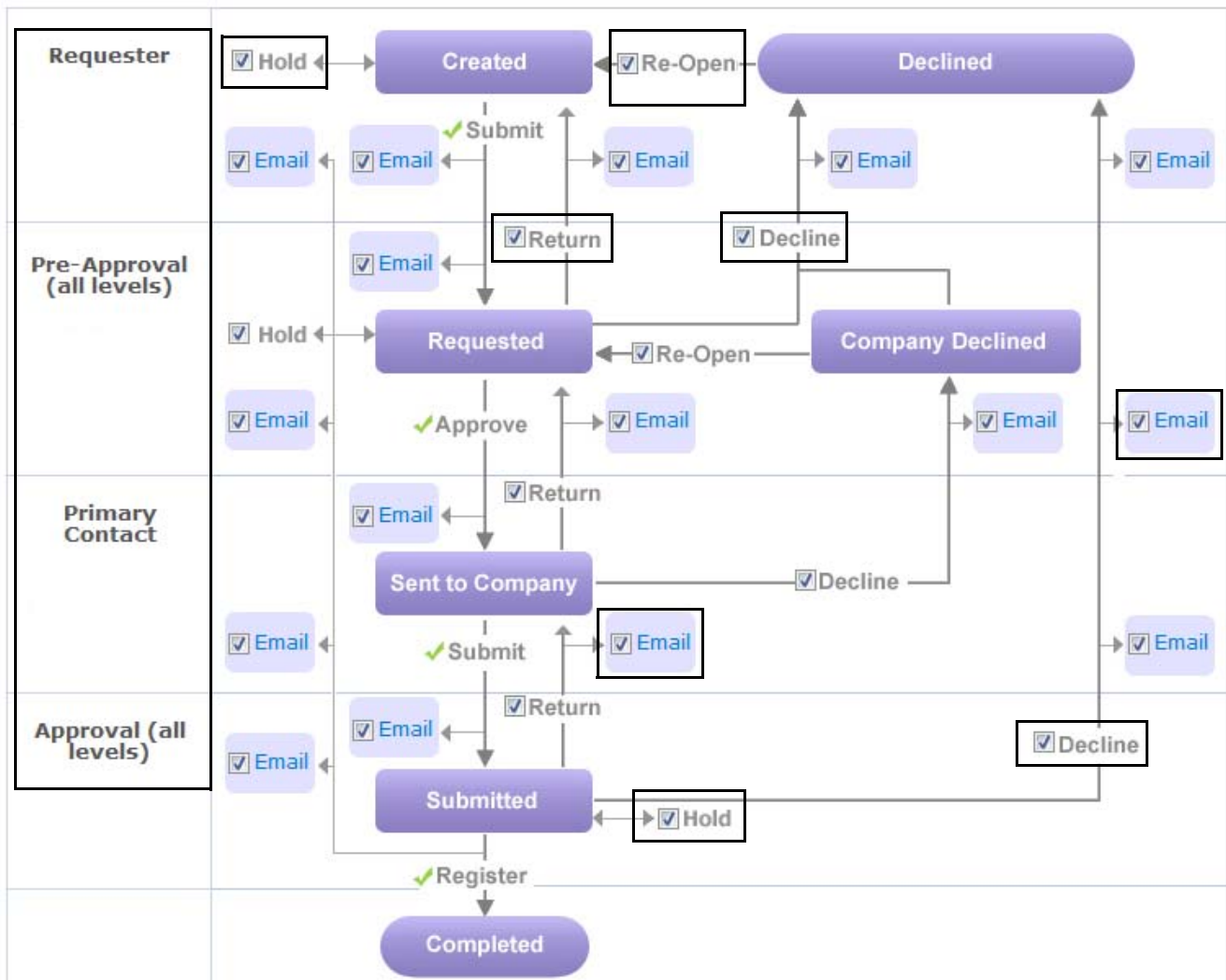
- | | |
|---|--|
| 1 | Design a Registration Workflow <ul style="list-style-type: none"> ■ Select workflow actions ■ Select workflow emails |
|---|--|

Topics include:

- “Understanding the Registration Process Page” on page 439
- “Configuring Workflow Actions” on page 443
- “Configuring Workflow Emails” on page 445

Understanding the Registration Process Page

The Registration process page shows a Registration workflow by role, including workflow actions and links to email templates.



The page lists:

- *Registration roles* and contacts (for example, Requestor, Pre-Approval, Primary Contact, Approval). The standard role and contact names can be customized (see ["Registration Roles and Contacts"](#) on page 425 and ["Defining Approval Levels and Approval Names"](#) on page 461).
- *Actions*, such as Hold, Return, Reopen, or Decline a registration request, can be *included* or *excluded* in various workflow phases, depending on a hub's business process for registering prospective suppliers. An action is shown with a check box for the role that can perform it.
- *Email templates* send email messages to contacts in registration roles. Emails can be *included* or *excluded* at many points in the workflow process. An email template is shown as a link in the box for the role that can perform it.

Important: Workflow actions and email templates are visually connected to the lines in the workflow.

To better understand how to work with the Registration Process page, see the following topics:

- [“Simple Registration Workflow” on page 440](#)
- [“Typical Registration Workflow” on page 442](#)

Simple Registration Workflow

The graphic shows a simple registration workflow where all actions go as planned. That is, the Requester submits a request, the request is approved by the Pre-Approval role, the request goes back to the Primary Contact at the supplier for more information, and the Approval role approves the request.

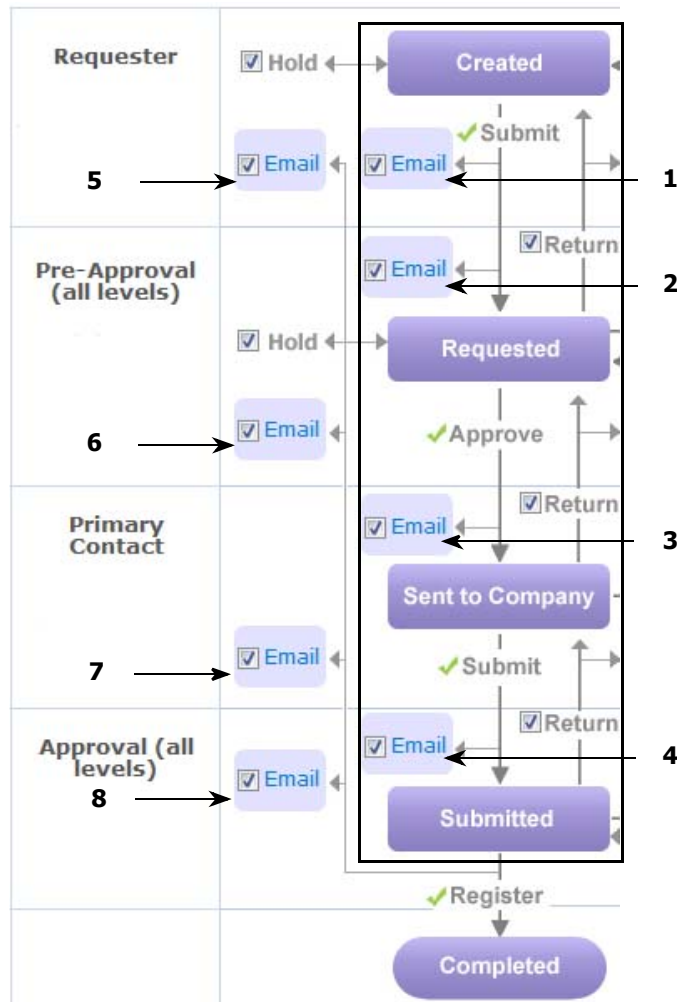
When a contact in the Approval role approves the request, Active Community:

- Creates the company and contacts based on information in the completed registration request.
- Sends emails to the Pre-Approval role and the Requester contact and the Primary Contact to notify them the company was registered in the hub’s community.

Important: Email notifications are visually tied to workflow actions, such as submit a request, pre-approve a request, and approve a request. You customize

email templates represented by the boxes by clicking the Email link associated with the workflow action.

Registration Workflow Start



Action Key

- 1 Hub sends "New Company Request, Copy to Requester" email to Requester contact
- 2 Requester contact sends "New Company Request Submitted for Pre-Approval" email to Pre-Approval role
- 3 Pre-Approval role sends "New Company Request Sent to Company to Complete" email to Primary Contact
- 4 Primary Contact sends "New Company Request Submitted for Approval" email to Approval role
- 5 Approval role sends "New Registered Company, Copy to Requester" email to Requester contact
- 6 Approval role sends "New Registered Company, Copy to Pre-Approvers" email to Pre-Approval role

- 7 Approval role sends "New Registered Company, Copy to Company" email to Primary Contact
- 8 Approval role sends "New Registered Company, Copy to All Approvers" email to all approvers at all approval levels

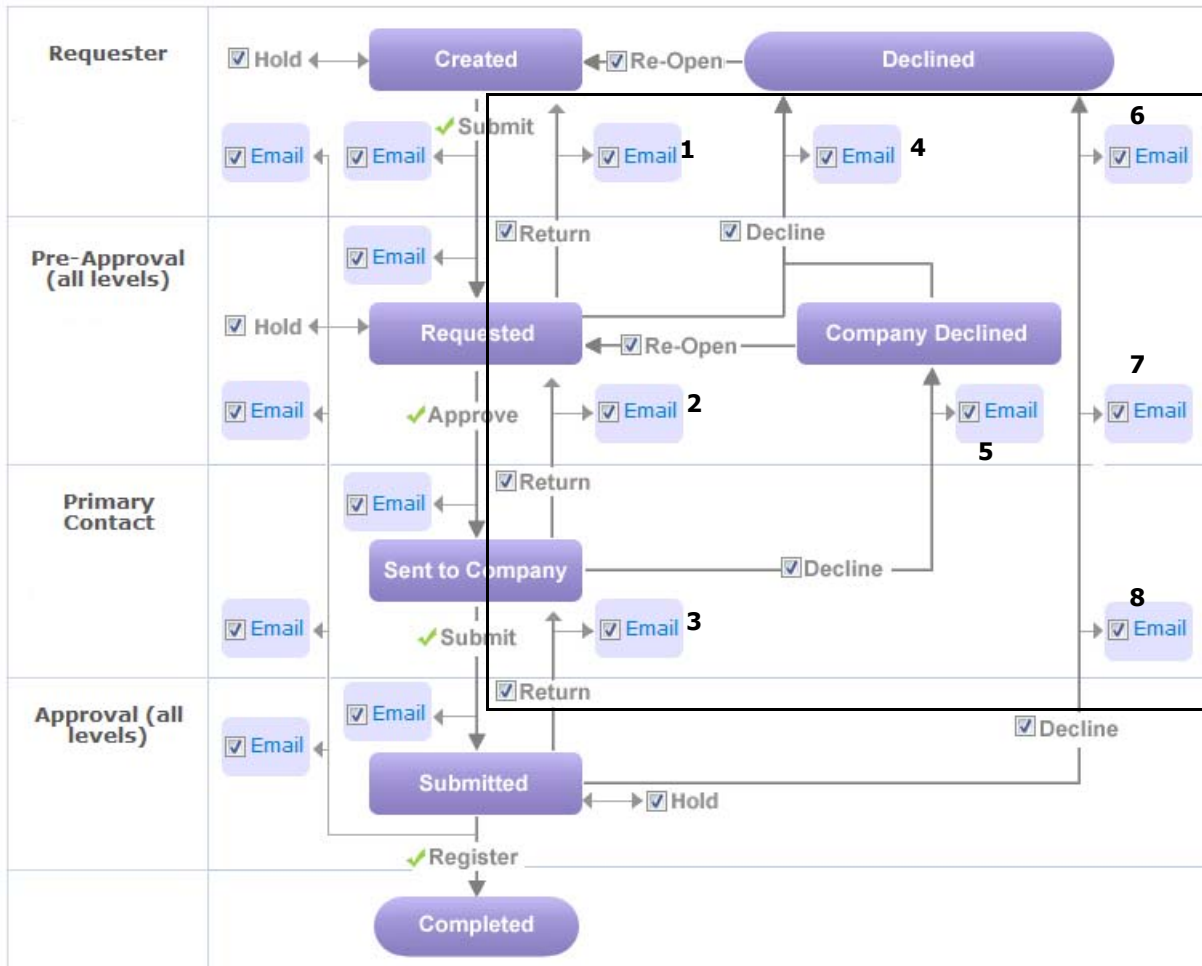
Typical Registration Workflow

This graphic shows a more complex registration workflow where registration requests are returned or declined.

When a contact in the Approval role approves the request, Active Community:

- Creates the company and contacts based on information in the completed registration request.
- Sends emails to the Pre-Approval role and the Requester contact and the Primary Contact to notify them the company was registered in the hub's community.

Important: Email notifications are visually tied to workflow actions, such as return request or decline request. You customize email templates by clicking the Email link associated with the workflow action.



Action Key

- 1 Pre-Approval role sends "New company request returned to requester" email to Requester contact

- 2 Pre-Approval role sends "New company request returned to all pre-approvers" email to Primary Contact
- 3 Approval role sends "New company request returned to company" email to Primary Contact
- 4 Pre-Approval role sends "New company request declined back to requester" email to Requester contact
Note: A request created using an anonymous URL can only be opened using the URL in the declined email message to the Requester contact. If the check box is clear or the email is unattended, the request cannot be reopened.
- 5 Primary Contact sends "New company request declined back to pre-approvers" email to Pre-Approval role
- 6 Approval role sends "New company request declined back to requester" email to Requester contact
- 7 Approval role sends "New company request declined back to requester, copy pre-approvers" email to Approval role
- 8 Approval role sends "New company request declined back to requester, copy to company" email to Approval role

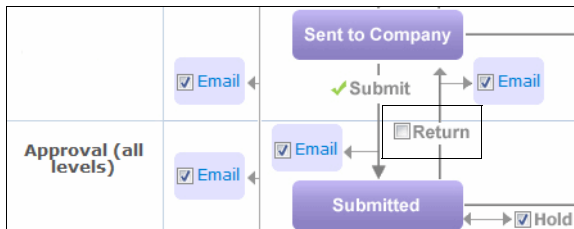
Configuring Workflow Actions

Security roles: Community Administrator and/or Registration Administrator

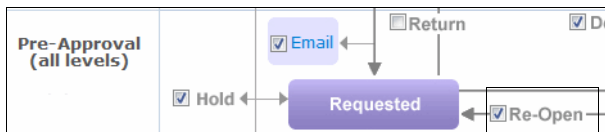
Important: Before you begin, ensure you review "Understanding the Registration Process Page" on page 439.

To configure a Registration workflow, select or clear check boxes for the actions you want to enable or disable for each registration role and contact. If you clear an action, that action button does not display in a registration request (see "Roles, Workflow Actions, and Request Buttons" on page 427). For example:

- If you clear the Return check box for the Approver role, all people in your organization who are Approvers (such as finance or supplier relations) do *not* see the **Return for More Information** button on registration requests.



- If you want your Pre-Approval role (procurement) to be able to re-submit a registration request if the supplier declines it because they do not recognize the sender, select the Re-Open check box. The **Reopen Request** button displays on registration requests.



To configure actions in a registration workflow

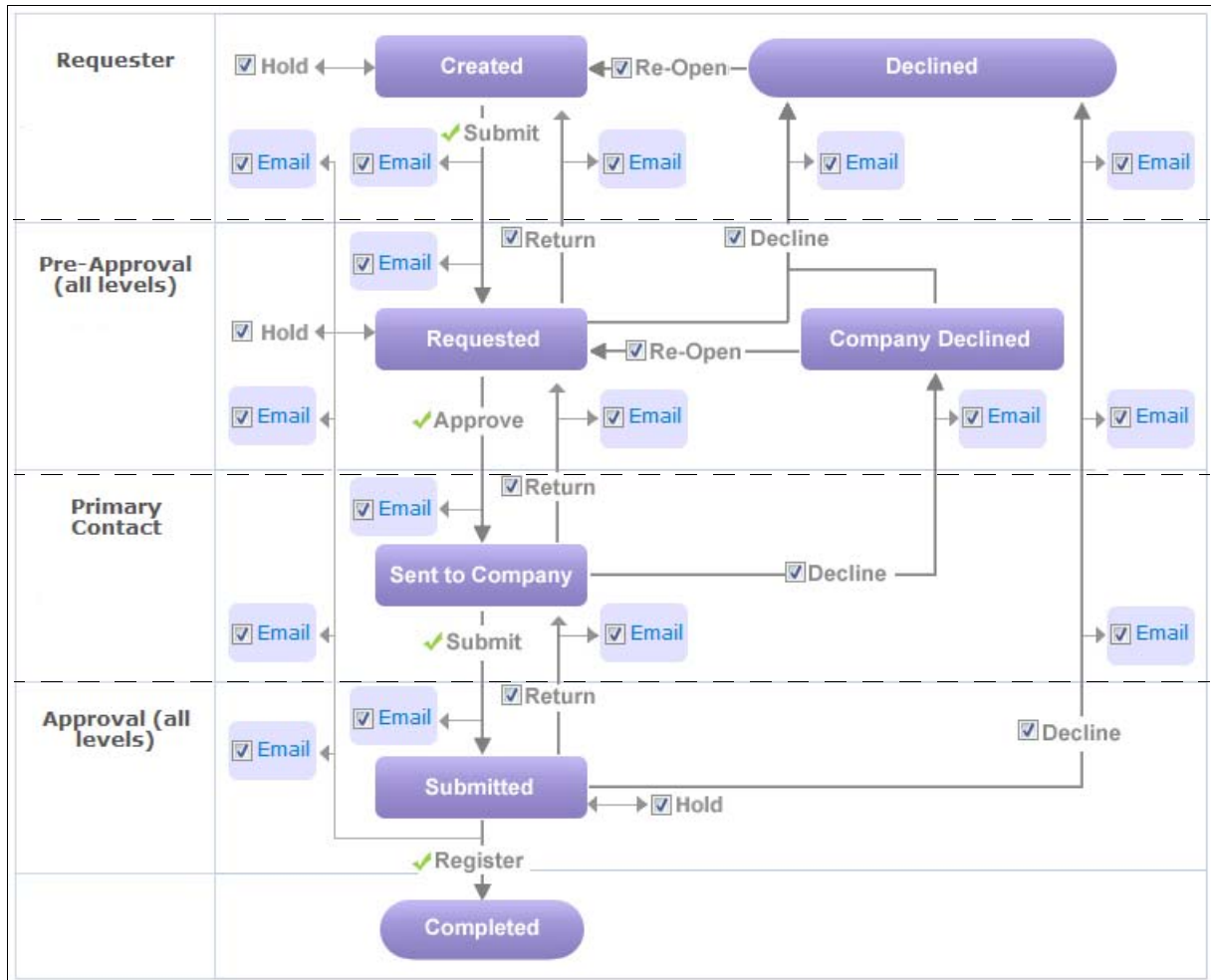
- 1 Click **Applications > Registration > Admin** tab.

The Registration Setup page opens.

- Click the **Configure Overall Workflow** link.

The Registration Process page opens.

In general, the lines with arrows that go down or up indicate workflow actions. The dotted lines (in the graphic) are a reminder that selected actions are specific to the roles and contacts listed (for example, Requestor, Pre-Approval, Primary Contact, Approval).



- Select or clear check boxes for the actions you want to enable or disable for each registration role and contact.
Important: When you clear an action, that action button does not display on the request.
- Click **Save**.
- Go to step 3 in "Configuring Workflow Emails" on page 445.

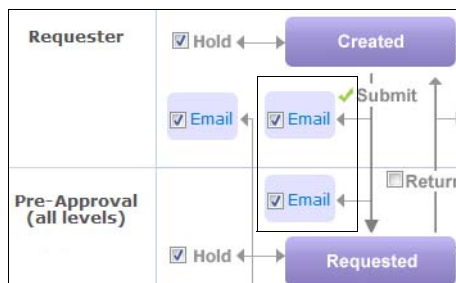
Configuring Workflow Emails

Security roles: Community Administrator and/or Registration Administrator

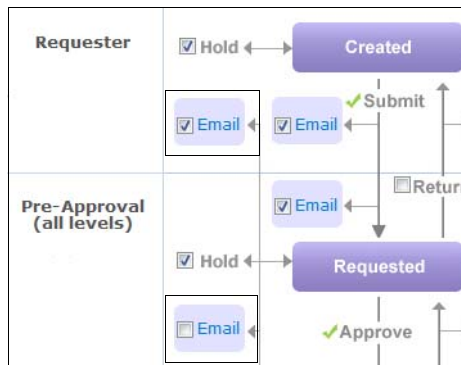
Important: Before you begin, ensure you review “[Understanding the Registration Process Page](#)” on page 439.

To configure email notifications to be sent to various roles at different stages of the registration process, select or clear check boxes for the email templates you want to enable or disable for each registration role and contact. For example:

- If you want a person who submits a registration request (buyer, sales representative, or another person) to receive an email copy of his or her request, select the Email check box. If you also want to notify the Pre-Approval role to notify him or her of a request that needs to be reviewed), select the Email check box.



- If you want a Requester contact (buyer) to receive an email when the Pre-Approval role approves the request, select the Email check box. If you do not want the Pre-Approval role to be notified (since that contact approved the request), do not select the Email check box.

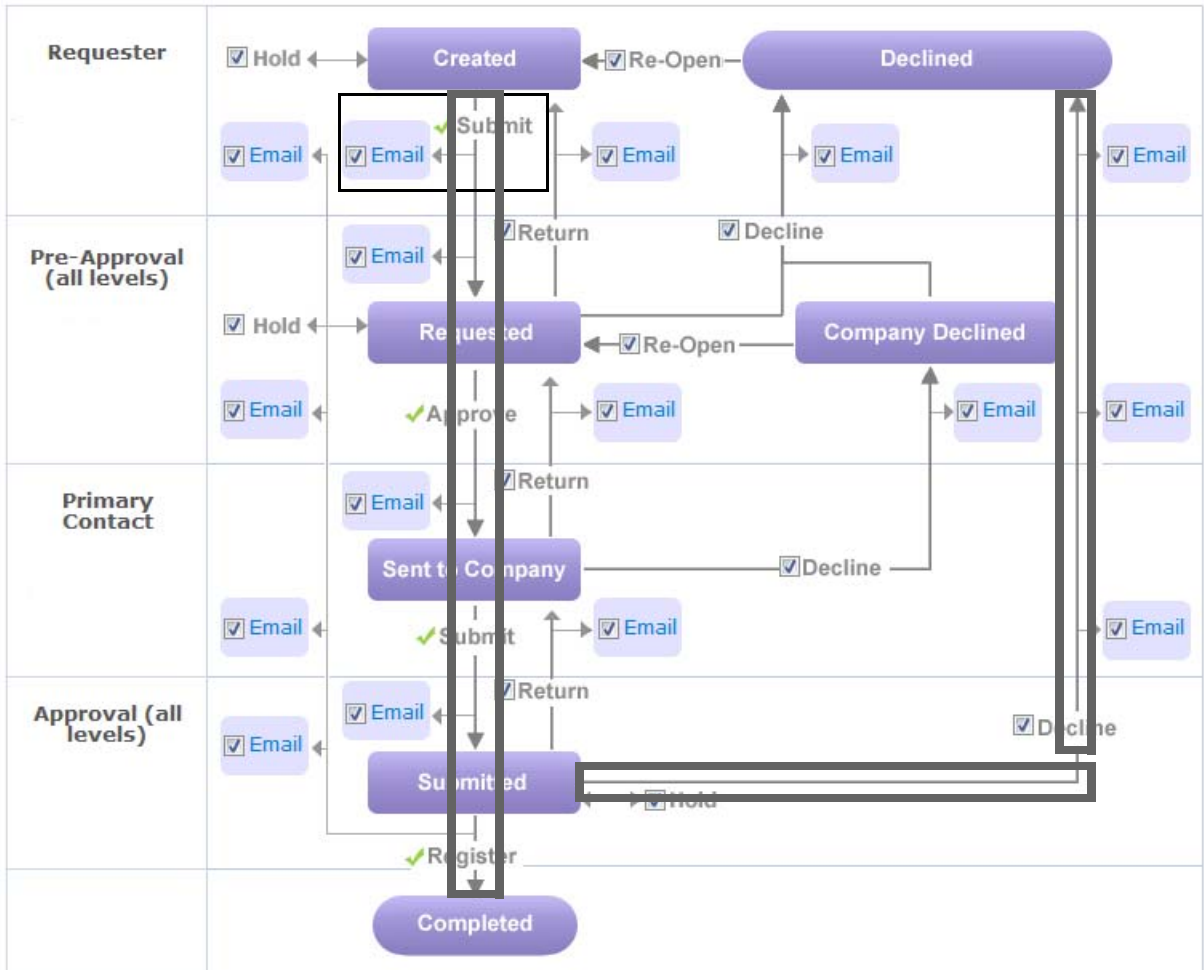


To configure emails for a registration request

- 1 Click **Applications > Registration > Admin** tab.
The Registration Setup page opens.
- 2 Click the **Configure Overall Workflow** link.

The Registration Process page opens. Emails are indicated by Email check boxes.

Note: Remember, workflow actions and email templates are visually connected to the lines in the workflow.



3 Select or clear check boxes for the emails you want to enable or disable for each registration role and contact.

Note: For example, if you want a Requester contact (buyer, sales representative, or another person) to receive an email copy of their request, select the Email check box for the Requestor for the Submit action.

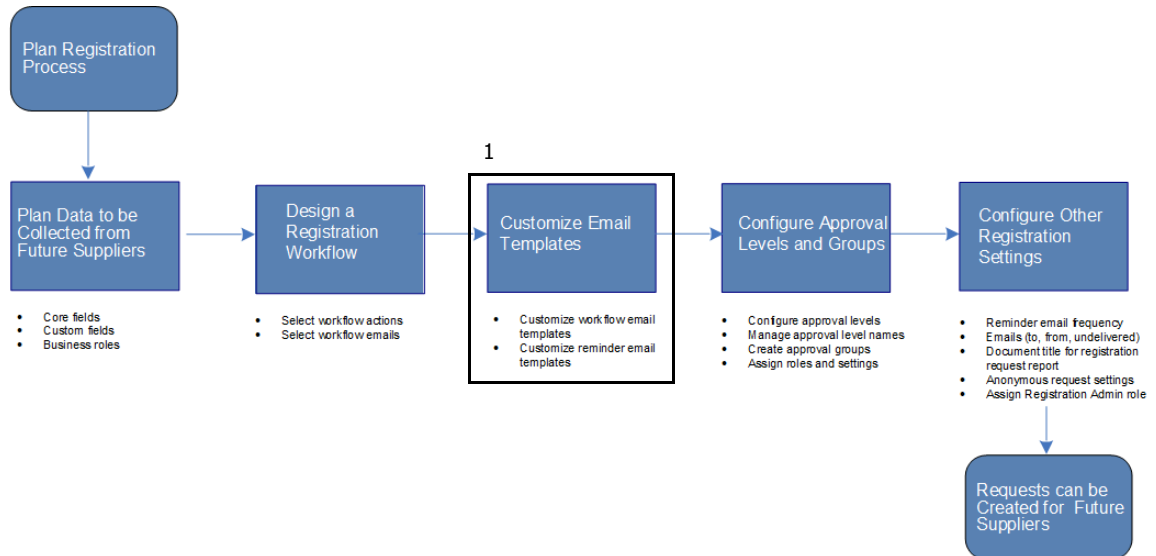
4 Click **Save**.

5 To customize the text for each email message, click the Email link to view and customize the message. For details, see “Phase 3: Customize Email Templates” on page 446.

Phase 3: Customize Email Templates

The next phase in the registration setup process is to tailor the message text for workflow or reminder email templates used by the host (that is, the email

templates selected in the registration workflow). Active Community provides standard email templates that are easily customized.



Phase 3: Customize Email Templates

Key	Description
-----	-------------

- | | |
|---|--|
| 1 | Customize Email Templates <ul style="list-style-type: none"> ■ Customize workflow email templates ■ Customize reminder email templates |
|---|--|

Email messages can be sent to new suppliers indicating they have been registered in Active Community, existing suppliers indicating their changes are being reviewed for approval, and procurement or supplier relation staff at the hub indicating requests are waiting to be reviewed and approved.

Topics include:

- [“About Form Fields” on page 447](#)
- [“Workflow Email Templates” on page 450](#)
- [“Reminder Email Templates” on page 454](#)
- [“Customizing Workflow Email Templates” on page 456](#)
- [“Customizing Reminder Email Templates” on page 458](#)
- [“Configuring an Email in a Different \(Supported\) Language” on page 460](#)

About Form Fields

Form fields (merge fields) use data extracted from core and custom fields in completed registration requests. They are “placeholder” fields that Active Community uses to insert values into email messages.

Note: The following custom field question formats are not supported as form fields in email messages: File Download, File Upload, Display Image Fields.

Percent signs (%) start and end each form field, for example, “%First Name%” and “%Last Name%”. Regular text can be included between the % signs, for example, “%From First Name%” and “%From Last Name%”.

For example, in the default email template for the “New company request second reminder” email, form fields are highlighted with bold text. The email reminds the Primary Contact to respond to a registration request.

Dear **%To First Name% %To Last Name%** ,
%Reminder - Number of Days% days ago you were sent a request to register with **%Hub Company Name%**. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.

Please click the link to **%View Request Link%**.

If you have trouble with the link, please copy and paste the following address into your browser: **%Request URL%**

Regards,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Based on form fields in the email template, the following email was sent. The form fields were filled in with the appropriate information from data in the registration request.

Dear Jane Smith,
Reminder 5 days ago you were sent a request to register with Acme Company. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.

Please click the link to www.acmecompany.com.

If you have trouble with the link, please copy and paste the following address into your browser: www.requestURL.com

Regards,
Robert Jones
713-454-7752
Acme Company

Sample Email Template Page

The graphic shows the parts of the “New company request second reminder” registration email template (see “Customizing Reminder Email Templates” on page 458).

Registration » Admin » Configure Email

New company request second reminder

TO: Primary Contact
FROM: Pre-Approval
DATE: 02 Jul 2014

Available Merge Fields

Select Field Type: Company
Select Field: Type Field Name
Insert Field

%Hub Company Name% request for %Request Company% registration second remind

Source [Icons] Arial 12

B I U S [Icons]

%From First Name%Dear %To First Name% %To Last Name% ,
%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.

Please click the link to %View Request Link%.

If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Regards,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Insert

- From First Name
- From Last Name
- From Phone Number
- From Company Name
- To First Name
- To Last Name
- To Phone Number
- To Company Name
- Request ID
- Request Type
- Request URL
- View Request Link
- Reminder - Number of Days
- Hub Company Name

Images

To and From

To and From fields are populated based on registration roles and contacts, workflow actions, and the phase of the registration process in which the email is being sent. In this example, the registration reminder email is sent based on the number of days after an initial reminder email was sent.

Insert and Available Merge Fields

Use Insert buttons to insert form fields into the subject line and body of a registration request. For example, when you click **First Name**, the field %First Name% is inserted in the message text. Active Community uses the first name in the recipient's completed registration request (for example, “John”) to replace the %First Name% “placeholder” when the message is sent.

Under **Available Merge Fields**, you can also use the drop down list and text box field to insert core and custom fields as merge fields by selecting the field type from the **Select Field Type** drop down list (for example, Company), and then type a field name into the **Select Field** box (for example, Tax ID). Then click **Insert Field** to insert the field into the body of the message text.

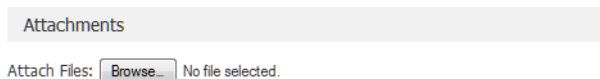
Note: The following custom field question formats are not supported as merge fields in email messages: File Download, File Upload, Display Image Fields.

Subject Line and Message Text

The Subject line and Message Text can be customized by using a combination of regular text and “placeholder” text (merge fields).

Note: The following custom field question formats are not supported as merge fields in email messages: File Download, File Upload, Display Image Fields.

The message can also include attachments, such a spreadsheets or images.



Important: So emails can flow through email servers, there is a 2 MB limit on attachments.

Workflow Email Templates

The actions in a registration workflow determine which registration emails Active Community sends to registration roles and contacts. You access and customize standard email templates from the Registration Process page, which is also used to define workflow actions. Email templates support multiple languages (see “Configuring an Email in a Different (Supported) Language” on page 460).

Each standard email template is described in the following topics:

- “Submit Action Email Templates” on page 450
- “Pre-Approve Action Email Templates” on page 450
- “Registration Request Action Email Templates” on page 451
- “Approval Action Email Templates” on page 451
- “Return Action Email Templates” on page 452
- “Decline Action Email Templates” on page 453

Submit Action Email Templates

New Company Request, Copy to Requester

The email indicates the request has been submitted for approval. It is sent from the hub community to the Requester contact.

Dear %To First Name% %To Last Name%,
Your new company request for %Request Company% has been sent for approval.
You may monitor this request at any time.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Pre-Approve Action Email Templates

New Company Request Submitted for Pre-Approval

The email indicates the request must be reviewed and approved. It is sent from the Requester contact to the Pre-Approval role.

Dear Pre-Approvers,
A new company registration request for %Request Company% has been sent for approval.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Regards from the requester
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Registration Request Action Email Templates

New Company Request Sent to Company to Complete

The email includes a link to the standard registration request for the host. It is sent from the Pre-Approval role to the Primary Contact. It is associated with the Registration Request action in the workflow.

Dear %To First Name% %To Last Name% ,
You have been accepted to register with %Hub Company Name% . We have a standard registration form that you need to complete in order to be set up.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
If you have any questions please contact me,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Approval Action Email Templates

New Company Request Submitted for Approval

The email indicates the Primary Contact submitted the completed registration request to the Approval role. It is sent from Primary Contact to the Approval role. It is associated with the Approval Action in the workflow.

Dear Approvers,
%From First Name% %From Last Name% from %Request Company% has submitted their registration forms for approval and registration.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

New Registered Company, Copy to Requester

The email notifies the Requester contact the company has been registered in the hub's community. It is sent from the Approval role to the Requester contact. It is associated with the Approval Action in the workflow.

Dear %To First Name% %To Last Name% ,
%Request Company% has been registered with %Hub Company Name%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

New Registered Company, Copy to Pre-Approvers

The email notifies the pre-approvers the company has been registered in the hub's community. It is sent from the Approval role to the Pre-Approval role. It is associated with the Approval Action in the workflow.

Dear Pre-Approvers,
%Request Company% has been registered with %Hub Company Name%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

New Registered Company, Copy to Company

The email notifies the Primary Contact the company has been registered in the hub's community. It is sent from the Approval role to the Primary Contact. It is associated with the Approval Action in the workflow.

Dear %To First Name% %To Last Name% ,
%Request Company% has been registered with %Hub Company Name%
If you have any questions please contact me,
%From First Name% %From Last Name%
%From Phone Number%
%Hub Company Name%

New Registered Company, Copy to All Approvers

The email notifies all approvers at all approval levels the company has been registered in the hub's community. It is sent from the Approval role to all approval roles. It is associated with the Approval Action in the workflow.

Dear Approvers,
%Request Company% has been registered with %Hub Company Name%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Return Action Email Templates**New company request returned to requester**

The email notifies the Requester contact they must update specific information. The email is sent from the Pre-Approval role to the Requester contact. It is associated with the Return action in the workflow.

Dear %To First Name% %To Last Name% ,
Thank you for the new company registration request for %Request Company% . I have returned the request to you to update for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

New company request returned to all pre-approvers

The email notifies the Primary Contact that they must update specific information. The email is sent from the Pre-Approval role to the Primary Contact. It is associated with the Return action in the workflow.

Dear Pre-Approvers,
%From First Name% %From Last Name% from %Request Company% has returned the request, for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

New company request returned to company

The email notifies the Primary Contact that they must update specific information. The email is sent from the Approval role to the Primary Contact. It is associated with the Return action in the workflow.

Dear %To First Name% %To Last Name% ,
Thank you for completing the %Hub Company Name% registration forms. I have returned the forms to you to update for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
If you have any questions please contact me,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Decline Action Email Templates

Important: An anonymous requester can only reopen and re-submit the request with the registration request link from a Declined email.

New company request declined back to requester

The email notifies the Requester contact their request to join the community has been declined for a specific reason. The email is sent from the Pre-Approval role to the Requester contact. It is associated with the Decline action in the workflow.

Dear %To First Name% %To Last Name% ,
Thank you for the new company registration request for %Request Company%. I have declined the request for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

New company request declined back to pre-approvers

The email notifies the Pre-Approval role that the Primary Contact has declined not to join the community for a specific reason. The email is sent from the Primary Contact to the Pre-Approval role. It is associated with the Decline action in the workflow.

Dear Pre-Approvers,
%From First Name% %From Last Name% from %Request Company% has declined the request, for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

New company request declined back to requester

The email notifies the Requester contact their request to join the community has been declined for a specific reason. The email is sent from the Approval role to the Requester contact. It is associated with the Decline action in the workflow.

Dear %To First Name% %To Last Name%,
The new company registration request for %Request Company% has been declined for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards
%From First Name% %From Last Name%
%From Phone Number%

%From Company Name%

New company request declined back to requester, copy pre-approvers

The email notifies the Pre-Approval role that a company's request to join the community has been declined for a specific reason. The email is sent from the Approval role to the Pre-Approval role. It is associated with the Decline action in the workflow.

Dear Pre-approvers,

The new company registration request for %Request Company% has been declined for the following reason:

%Reason%

Please click the link to %View Request Link%.

If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Regards

%From First Name% %From Last Name%

%From Phone Number%

%From Company Name%

New company request declined back to requester, copy to company

The email notifies the Primary Contact that their company's request to join the community has been declined for a specific reason. The email is sent from the Approval role to the Primary Contact. It is associated with the Decline action in the workflow.

Dear %To First Name% %To Last Name% ,

Thank you for completing the %Hub Company Name% registration forms. The registration has been declined for the following reason:

%Reason%

If you have any questions please contact me,

%From First Name% %From Last Name%

%From Phone Number%

%From Company Name%

Reminder Email Templates

Active Community sends reminder emails based on the number of days that have elapsed after a request was sent but no response has been received (see ["Defining Reminder Email Settings" on page 470](#)). Reminder emails can be sent to the Primary Contact, and to the Pre-Approval and Approval registration roles. Email templates support multiple languages (see ["Configuring an Email in a Different \(Supported\) Language" on page 460](#)).

Topics include:

- ["Primary Contact Reminder Email Templates" on page 454](#)
- ["Approval/Pre-Approval Reminder Email Templates" on page 455](#)

Primary Contact Reminder Email Templates

With increasing urgency, these email templates remind the Primary Contact to respond to a registration request. The emails are sent from the Pre-Approval role to the Primary Contact.

New Company Request First Reminder

Dear %To First Name% %To Last Name% ,

%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. We see that you have not completed the registration forms. If you are

not sure the purpose of this request or need help getting started please contact me ASAP, see my contact details below.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

New company request second reminder

Dear %To First Name% %To Last Name% ,
%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards,
%From First Name% %From Last Name%
%From Phone Number%

New Company Request Third Reminder

Dear %To First Name% %To Last Name% ,
%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. We have sent two previous reminders and offers to provide assistance with this process however, to date we see that you have not completed the registration forms. This is a final reminder. If you do not complete the registration request your organization will be dropped from the registration process in 7 days of this reminder. If you do not wish to be dropped from the registration process please contact me ASAP, see my contact details below.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards,
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Approval/Pre-Approval Reminder Email Templates

With increasing urgency, these email templates remind contacts in the Pre-Approval and Approval groups they need to review and approve registration requests. The emails are sent from the registration Administrator role to all Approval/Pre-Approval groups.

New company request Approver/Pre-Approver first reminder

Dear %To First Name% %To Last Name% ,
%Reminder - Number of Days% days ago you were sent a registration request for %Request Company% to review and approve. We see that you have not yet completed this task.
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser:
%Request URL%
Regards,
%From Company Name%

New company request Approver/Pre-Approver second reminder

Dear %To First Name% %To Last Name% ,

%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.

Please click the link to %View Request Link%.

If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Regards,

%From First Name% %From Last Name%

%From Phone Number%

%From Company Name%

New company request Approver/Pre-Approver third reminder

Dear %To First Name% %To Last Name% ,

%Reminder - Number of Days% days ago you were sent a request for %Request Company% to review and approve. We have emailed you two reminders to approve this registration request but see that you have still not completed this task. The completion of this registration request is important to our business, please review and approve as soon as possible.

Please click the link to %View Request Link%.

If you have trouble with the link, please copy and paste the following address into your browser:

%Request URL%

Regards,

%From Company Name%

Customizing Workflow Email Templates

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to customize the message text, form fields, and attachments included in email templates for workflow actions.

To customize messages in workflow email templates

- 1** Click **Applications > Registration > Admin** tab.

The Registration Setup page opens.

- 2** Click the **Configure Overall Workflow** link.

The Registration Process page opens.

- 3** Click the Email link for the workflow action for which you want to customize the message.

Important: Each Email link in the workflow corresponds to a different email template, which allows for different messages to be sent at different parts of the workflow (see "[Workflow Email Templates](#)" on page 450).

The Configure Email page opens for the selected email template.

New company request returned to requester

TO: Requester
FROM: Pre-Approval
DATE: 21 Jul 2014

Available Merge Fields

Select Field Type: Company
Select Field: Type Field Name
Insert Field

%Request Company% new company registration request returned to requester

Dear %To First Name% %To Last Name% ,
Thank you for the new company registration request for %Request Company% . I have returned the request to you to update for the following reason:
%Reason%
Please click the link to %View Request Link%.
If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%
Regards
%From First Name% %From Last Name%
%From Phone Number%
%From Company Name%

Cancel SAVE

Attachments

Attach Files: Browse... No file selected.

Insert

- From First Name
- From Last Name
- From Phone Number
- From Company Name
- To First Name
- To Last Name
- To Phone Number
- To Company Name
- Request Company
- Request ID
- Request Type
- Request URL
- View Request Link
- Reason
- View Registration Report
- Hub Company Name
- Images

4 Customize the message text as needed.

Note: You use a combination of regular text and “placeholder” text called form fields. The “placeholder” text allows you to add, for example, the recipient’s first and last name to the email message. The fields are filled in with the participant’s information when the email is sent.

- a** To use form fields, put your cursor in the email message where you want to insert the form field (see “Form Field Descriptions” on page 459).
- b** Select the appropriate form field button to insert the form field, such as Email Address.

5 To add attachments, such as spreadsheets or images, click **Browse**, navigate to and select the attachment, and click **Open**.
The attachment is added to the email template.

6 When the message is complete, click **Save**.

Important: Clicking Save does not send the message; it saves your changes to the email template. The email message is sent when a registration request reaches the appropriate stage in the workflow; for example, when a contact in the Pre-Approval role declines or approves a request.

Customizing Reminder Email Templates

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to customize the message text, form fields, and attachments included in reminder email templates.

To customize messages in reminder email templates

- 1 Click **Applications > Registration > Admin** tab.
The Registration Setup page opens.
- 2 Click the **Registration Settings** link.
The Registration Settings page opens.
- 3 In the Approval/Pre-Approval Reminders part of the page, click **Configure Email** for the appropriate reminder setting. The email's text is different based on whether it is for reminder 1, 2, or 3.

Important: Each Email link corresponds to a different email template, which allows for different messages to be sent (see "Reminder Email Templates" on page 454).

The Configure Email page opens for the selected email template.

New company request second reminder

TO: Primary Contact
FROM: Pre-Approval (all levels)
DATE: 29 Jul 2014

Available Merge Fields

Select Field Type: Company
Select Field: Type Field Name
Insert Field

%Hub Company Name% request for %Request Company% registration second remind

Dear %To First Name% %To Last Name% ,
%Reminder - Number of Days% days ago you were sent a request to register with %Hub Company Name%. This is our second reminder to you about this registration request. To date, we see that you have not completed the registration forms. The completion of this registration request is important for us to do business with you. Please contact me ASAP, see my contact details below.

Please click the link to %View Request Link%.

If you have trouble with the link, please copy and paste the following address into your browser: %Request URL%

Regards,

Cancel SAVE

Attachments

Attach Files: Browse... No file selected.

Insert

- From First Name
- From Last Name
- From Phone Number
- From Company Name
- To First Name
- To Last Name
- To Phone Number
- To Company Name
- Request ID
- Request Type
- Request URL
- View Request Link
- Reminder - Number of Da
- Hub Company Name
- Images

- 4 Customize the message text as needed.

Note: You use a combination of regular text and "placeholder" text called form fields. The "placeholder" text allows you to add, for example, the

recipient's first and last name to the email message. The fields are filled in with the participant's information when the email is sent.

- a To use form fields, put your cursor in the email message where you want to insert the form field (see ["Form Field Descriptions"](#) on page 459).
 - b Select the appropriate form field button to insert the form field, such as Email Address.
- 5 When the message is complete, click **Save**.

The Registration Settings page re-opens. A message indicates the email template was successfully updated.

Important: Clicking Save does not send the message; it saves your changes to the email template. The email message is sent based on the reminder email settings, such as four days after a first reminder email is sent.

Form Field Descriptions

The table describes form fields available as buttons in email templates used during the registration process. Some fields are common to all email templates; others are used only in specific templates. Not all form fields are shown.

Click this button...	To insert this form field in an email template:	Description
Insert <hr/> From First Name From Last Name From Phone Number From Company Name To First Name To Last Name To Phone Number To Company Name Request Company Request ID Request Type Request URL View Request Link Reason View Registration Report Hub Company Name	%From First Name%	First name of the registration role that sends the message.
	%From Last Name%	Last name of the registration role that sends the message.
	%From Phone Number%	Telephone number for the from registration role.
	%From Company Name%	Name of the hub company that is sending the registration request; for example, "Big Hub Stores."
	%To First Name%	First name of the registration request participant; for example, "John."
	%To Last Name%	Last name of the registration request participant; for example, "Smith."
	%To Phone Number%	Telephone number for the registration request participant.
	%To Company Name%	Name of the potential supplier the hub company wants to do business with; for example, "Acme Industries."
	%Request Company%	Company name to be registered.
	%Request ID%	Unique ID generated for each registration request.
	%Request Type%	Company registration is the default
	%Request URL%	URL for the request page, which is a hyperlink. Note: Each approval level has its own URL.
	%View Request Link%	Link to navigate to the request page.
	%Reason%	Reason the request is being declined, returned for more information, or re-opened.
	%View Registration Report%	A link to generate a PDF that contains the information in the registration request page.
	%Hub Company Name%	Name of the company to which the requester contact belongs (typically the hub company).

Configuring an Email in a Different (Supported) Language

Use this procedure to configure an email in a different language (one that is supported by Active Community).

After you create an email in your default language, you can configure it in a second (or more) language(s). Then, for example, when a user accesses Active Community in English, they see the email in English, and when they access Active Community in Spanish (or change the language to Spanish), they see the email in Spanish.

To configure an email in a different language

- 1 Create an email. Save your changes. See applicable topics in [“Phase 3: Customize Email Templates” on page 446](#).
- 2 Change the Active Community language to another (supported) language (see [“Changing Your Language” on page 11](#)).
- 3 In that second language, modify the same email. For example, if you changed your language to Spanish, modify the email so that it is written in Spanish. Save your changes.

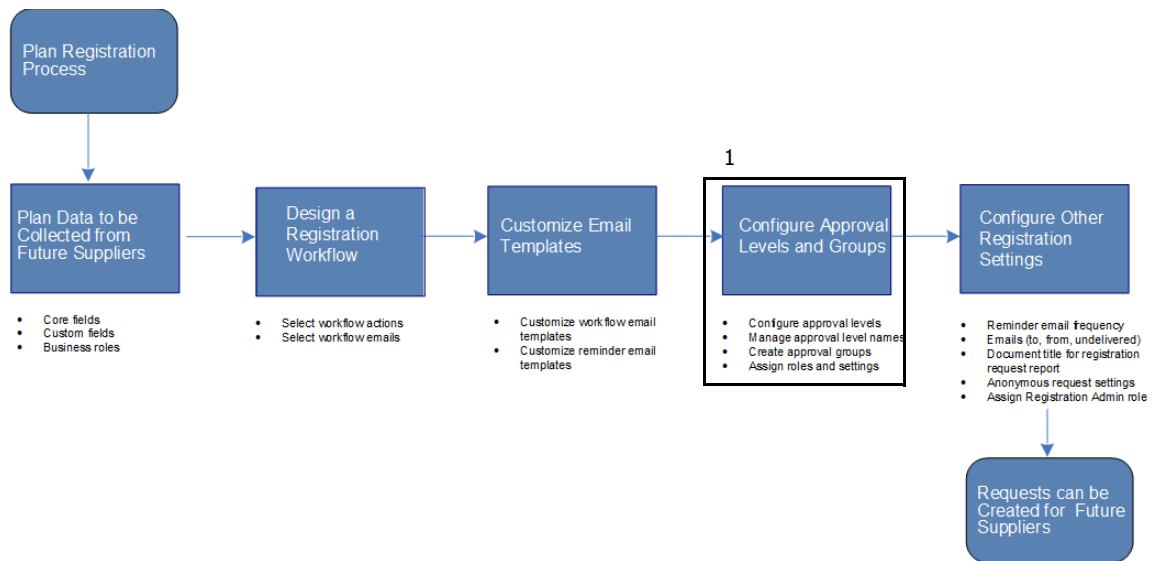
You can now change your language to either of the languages where you configured the emails, and those emails will display in either of the two languages depending on which language you select for Active Community.

Phase 4: Configure Approval Levels and Groups

In the next phase of the registration request setup process, you configure settings for approval levels, groups, and roles.

- *Approval levels* determine how many times a registration request must be approved as it flows through a registration workflow.
 - Important:** Registration requests have two approval stages: Pre-Approval and Approval. You configure the number of approval *levels* for each stage. Up to 10 approval levels are available.
- *Approval groups* are groups of contacts who have been assigned to one or more Pre-Approval or Approval levels.

- *Approval roles* include the Pre-Approval and Approval roles. The roles are assigned to contacts in addition to their security roles.



Phase 4: Configure Approval Levels and Groups

Key	Description
1	<ul style="list-style-type: none"> Configure Approval Levels and Groups <ul style="list-style-type: none"> Configure approval levels Manage approval level names Create approval groups Assign roles and settings

Topics include:

- [“Defining Approval Levels and Approval Names” on page 461](#)
- [“Adding Approval Groups Based on Approval Levels” on page 463](#)
- [“Assigning Contacts to Approval Groups” on page 464](#)
- [“Mapping Approval Groups to Approval Levels” on page 466](#)
- [“Bypassing Pre-Approval and Approval Levels” on page 468](#)

Defining Approval Levels and Approval Names

Security roles: Community Administrator and/or Registration Administrator

Approval levels determine how many times a registration request must be approved as it flows through the registration approval process.

Registration requests have two approval stages: Pre-Approval and Approval. You configure the number of approval *levels* for each stage. Up to 10 approval levels are available.

Important: Pre-Approval level 1 and Approval level 1 can *edit* a registration request. The request is read only for approval levels 2-10, but levels 2-10 can view, decline, approve, and ask questions.

To define approval levels and approval names

- 1 Click **Applications > Registration > Admin** tab.

The Registration Setup page opens.

- 2 Click the **Configure Approvals** link.

The Configure Approval page opens.

Approval Stage	Number of Levels	Routing Condition Field
Pre-approval	2 Levels	Normal Group - Drop
Approval	1 Level (Default)	

- 3 Under Configure Approval, select the number of approvals required for the Pre-Approval and Approval stages in the workflow. If you select:

- None (skip) you bypass the Pre-approval or Approval stages in the workflow. A registration request submitted by a supplier is not reviewed by approvers, and the supplier is automatically registered in Active Community and its company and contacts are created.
- Level 1 (Default) or levels 2-10, the **Map Approval Groups to Approval Roles** link is activated (see ["Mapping Approval Groups to Approval Levels" on page 466](#)).

The Routing Condition Field displays if one or more levels are selected.

Note: You cannot delete a level if that level is responsible for completing a required core field for registration (see ["Defining Core Fields in Registration Requests" on page 431](#)).

- 4 In the Routing Condition field, select or type the custom field(s) in the request that automatically route the request to an approval role.

Important: The request routes to the assigned approvals only if the Routing field is populated in the request. Drop List and Radio Button List custom fields are displayed in the drop-down list.

- 5 Under Customize Approval Stage Labels, in the Label column, type over any label you want to modify.

Note: TGO Provision displays for TGO integrated communities only.

Approval Stage	Label
Requester	Requester
Pre-Approval	OT Admin FR
Primary Contact	Company EN
Approval	OT Approval FR
TGO Provision	Tgo Provision

Default Tab : Primary Contact Details

Save Cancel

Note: There is multiple language support for the Primary Contact label. For more information on language support, see ["Language Options for Custom Field Groups, Questions, and Choices"](#) on page 238 and ["Changing Your Language"](#) on page 11.

- 6 Select a default landing tab for the primary contact. This is the tab that you want the primary contact to land on when they receive a registration request and enter the registration module.

Note: Only tabs that are parent tabs are displayed in the drop-down list and can be selected. You cannot select a dependent tab (child tab)

- 7 Click **Save**.

- 8 Go to ["Adding Approval Groups Based on Approval Levels"](#) on page 463.

Adding Approval Groups Based on Approval Levels

Security roles: Community Administrator and/or Registration Administrator

Approval groups are groups of contacts who have been assigned to one or more Pre-Approval and Approval levels for registration requests.

Use this procedure to indicate if contacts in an approval group have the ability to pre-approve or approve registration requests.

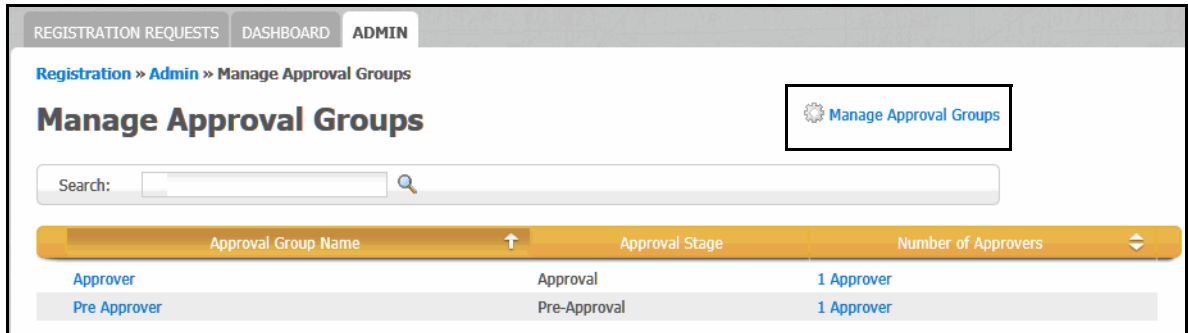
To add approval groups based on approval levels

- 1 Click **Applications > Registration > Admin** tab.

The Registration Setup page opens.

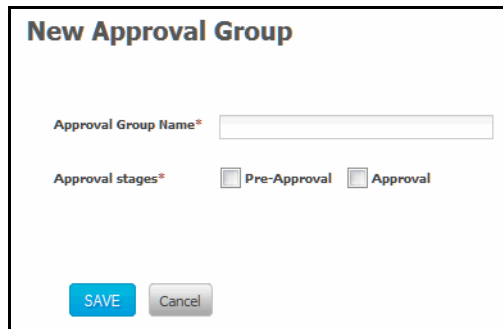
- 2 Click the **Manage Approval Groups** link.

The Manage Approval Groups page opens. It lists the approval stages and the number of reviewers assigned to each stage.



3 Click Manage Approval Groups > Add Group.

The New Approval Group page opens.



4 In Name, type a name for the approval group.

5 In Approval Stages, select Pre-Approval or Approval to indicate the approval stage to associate with a role.

6 Click **Save**.

7 Go to ["Assigning Contacts to Approval Groups"](#) on page 464.

Assigning Contacts to Approval Groups

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to assign approval roles, groups, and settings to hub contacts.

To assign roles, groups, and email settings for registration requests

1 Click **Applications > Registration > Admin** tab.

2 Click the **Contact Security Settings** link.

The Contact Security Settings page opens.

Contact Security Settings Export Contacts

Search for contacts and then select the name to add or modify the security settings.

Filter by: Role Please Select View All Requests

Group Please Select

Actions All search results

11953 Contacts (Showing 31-40 of 11953) « Previous Next »

Contact	Role	Groups	View All Requests	Receive Email
Registration contactap56				
Registration contactap56				
Registration contactap57				
Registration contactap57				
dhiren jha	Administrator Pre-Approver	Pre-Approval	✓	✓
rejal karim	Administrator Pre-Approver Approver	Pre-Approval Approval	✓	✓
rajesh kumar				
Sajjan kumar	Administrator Pre-Approver Approver	Approval Account	✓	✓

3 In the Contact column, select a hub contact.

The Configure Roles page for the selected contact opens. Two sections, Approval Role and Administrative Role, display initially.

Configure Roles for Shabe Ter

Approval Role

Please select the appropriate role for the contact to pre-qualify or approve new registration requests.

Pre-Approval Role

Approval Role

Administrative Role

Please add this contact to the administrative role. This will allow the contact to address undeliverable email issues and re-assign requests to different approval groups

Admin Role

4 In Approval Roles, select one or both approval roles to assign to the hub contact.

If either approval role is selected, Approval Group and Approval Settings display on the page.

Approval Role

Please select the appropriate role for the contact to pre-qualify or approve new registration requests.

Pre-Approval Role

Approval Role

Approval Group

Please select the appropriate approval group for the contact to pre-qualify or approve registration requests.

Pre-Approval	Pre-Approval x
Approval	Approval x

Please Select

+ Add to List

Approval Settings

Please select View All or Send Email to display or send emails to the contact, for all group requests not just those for which they are the owner.

View All Requests

Receive Emails

Administrative Role

Please add this contact to the administrative role. This will allow the contact to address undeliverable email issues and re-assign requests to different approval groups

Admin Role

- 5 In Approval Group, select the Approval or Pre-Approval groups to assign to the contact. To assign the contact to multiple approval groups, select the groups and click **Add to List**.
- 6 In Approval Settings, select one or more check boxes. Based on your selections, you can let the contact view or receive emails for all group requests, not just the requests for which they are the owner.
 - View All Requests—View all registration requests.
 - Receive Emails—Receive all emails related to registration requests.

Note: If the check box for Receive Emails is clear, the contact does not receive any registration emails.
- 7 In Administrative Role, select the check box to assign the Registration Administrator role to the contact.

Important: The role allows the contact to address undeliverable email issues and re-assign requests to different approval groups.
- 8 Click **Save**.
- 9 Go to ["Mapping Approval Groups to Approval Levels"](#) on page 466.

Mapping Approval Groups to Approval Levels

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to select the approval group you want to pre-approve and approve registration requests for each approval level. Based on your selections, Active Community routes registration requests to contacts in the approval group.

Important: To use this functionality, the Number of Levels field for each approval stage must have Level 1 (Default) or levels 2-10 selected (see [“Defining Approval Levels and Approval Names”](#) on page 461).

To map approval groups to approval levels

1 Applications > Registration > Admin tab.

The Registration Setup page opens.

2 Click the **Map Approval Groups to Approval Roles** link.

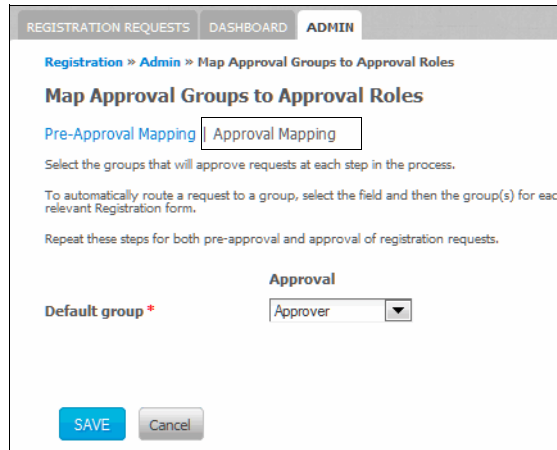
The Map Approval Groups to Approval Roles page opens for Pre-Approval Mapping.

Note: The information on this page is based on settings in the Number of Levels for pre-approvers (see [“Defining Approval Levels and Approval Names”](#) on page 461).

3 Use the drop-down lists to select the approval group for the appropriate approval level, and click **Save**.

At the top of the page, click **Approval Mapping**.

The Map Approval Groups to Approval Roles page opens for Approval Mapping.



Note: The information on this page is based on settings in the Number of Levels for approvers (see ["Defining Approval Levels and Approval Names" on page 461](#)).

- 4 Use the drop-down lists to select the approval group for the appropriate approval level, and click **Save**.

Bypassing Pre-Approval and Approval Levels

Security roles: Community Administrator and/or Registration Administrator

To onboard companies with little or no manual intervention, you can bypass the Pre-Approval and/or Approval levels during registration. As a result, registration requests submitted by any supplier are not reviewed by any approvers. Instead, the supplier is automatically registered in Active Community and its company and contact profiles created.

Limitations:

- The Requester and Primary Contact levels cannot be skipped.
- If final approval is Skipped, ensure the Auto Generate Company IDs field is selected (Admin > Community Settings).
- The Questions tab cannot be used if approval levels are skipped.

To bypass approval levels for registration requests

- 1 Click **Applications > Registration > Admin** tab.
The Registration Setup page opens.
- 2 Click the **Configure Approvals** link.

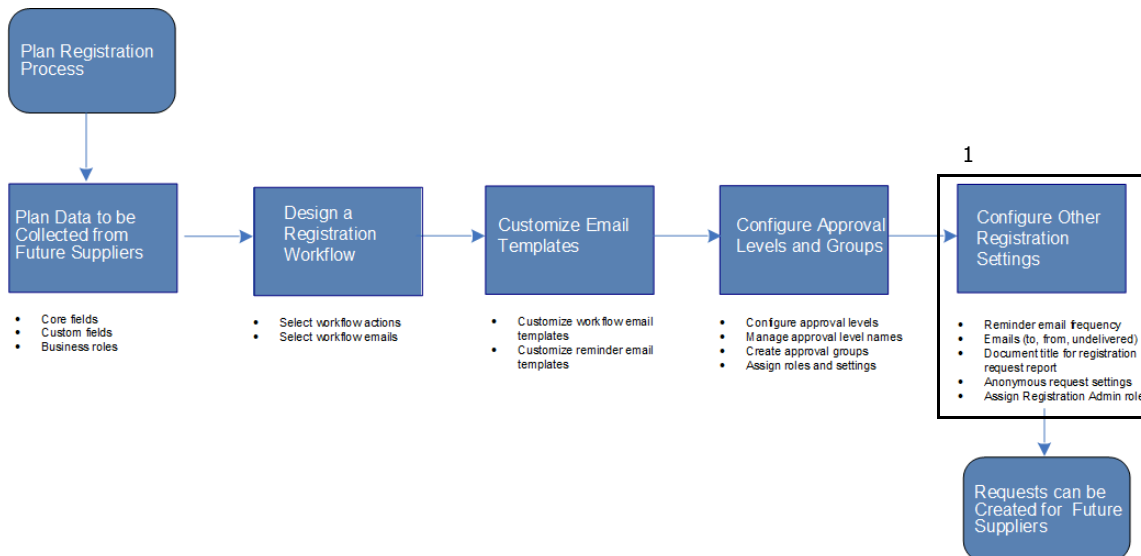
The Configure Approval page opens.

Approval Stage	Number of Levels	Routing Condition Field
Pre-approval	None (skip)	
Approval	None (skip)	

- 3 To bypass the Pre-approval stage, from the Pre-approval drop-down list, select **None (skip)**.
- 4 To bypass the Approval stage, from the Approval drop-down list, select **None (skip)**.
- 5 Click **Save**.

Phase 5: Configure Other Registration Settings

The final phase in the registration setup process is to configure miscellaneous request settings, including reminder email frequency and anonymous request settings.



Phase 5: Configure Other Registration Settings

Key	Description
-----	-------------

- | | |
|---|--|
| 1 | Configure Other Registration Settings <ul style="list-style-type: none">■ Reminder email frequency■ Emails (to, from, undelivered)■ Document title for registration request report■ Anonymous request settings■ Assign Registration Admin role |
|---|--|

Topics include:

- [“Defining Reminder Email Settings” on page 470](#)
- [“Configuring From, To, and Undeliverable Email Addresses” on page 472](#)
- [“Customize Document Title for Registration Request Report” on page 473](#)
- [“Configuring Anonymous Request Settings” on page 473](#)
- [“Assigning the Registration Administrator Role” on page 475](#)

Defining Reminder Email Settings

Security roles: Community Administrator and/or Registration Administrator

To automatically prompt contacts in the Primary Contact, Pre-Approval, or Approval roles to respond to requests for information or approve a registration request, you can:

- Send up to three automatic reminders after a request has been submitted. Active Community sends a reminder email after a specific number of days has passed.
- Tailor the message text for each reminder email, insert form fields (such as the first and last name of the recipient), and attach files (such as pictures) to the message.

For example, you might send a registration request to the Primary Contact at the prospective supplier and asked him or her to complete information gaps in the request, but have not yet received a response. Or, you might want to remind contacts in the Pre-Approval or Approval roles that a registration request is waiting to be reviewed and approved.

To configure reminder email settings for primary contacts and approvers

- 1 Click **Applications** > **Registration** > **Admin** tab.
- 2 Click the **Registration Settings** link.

The Registration Settings page opens.

3 Perform the appropriate action:

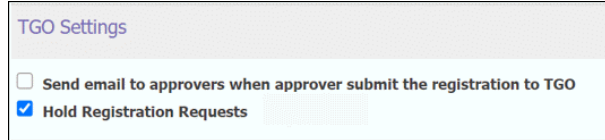
To define settings for...	Do this:
Reminder emails for Primary Contacts and/or Approval and Pre-Approval roles	Go to step 4.
Business role data collection from prospective suppliers	Go to step 7.

4 In Primary Contact Reminders and/or Approval/Pre-Approval Reminders:

- a** Click the check boxes for the first, second, and third reminder emails.
- b** In Number of Days, type a number for the reminder you want to send.
 - Note:** You define actual days or business days in step 5.
- c** To customize message text, click **Configure Email** for the appropriate reminder. The email text is different based on whether it is for reminder 1, 2, or 3.
 - 1** Click **Save** to save any registration settings you have already made.
 - 2** Modify the message text, insert form fields, and attach files to the message as needed (see "Reminder Email Templates" on page 454).
 - 3** After formatting the email message, click **Save**.

The Registration Settings page re-opens. A message indicates the email template was successfully updated.

- 5 In Calendar Settings, select Business Days or Actual Days to indicate how you want Active Community to calculate the number of elapsed days before it sends reminder emails.
- 6 (Optional) If you are using Trading Grid Online (TGO) integrated with Active Community), the TGO Settings section displays.



TGO Settings

- Send email to approvers when approver submit the registration to TGO
- Hold Registration Requests

Indicate the following:

- If you want emails to be sent to approvers when an approver submits a registration to TGO, select the appropriate check box.
 - If you want registration requests to be held until you send to TGO for auto provisioning, select the appropriate check box.
- 7 In the Contact Collection part of the page, indicate which business roles you want to collect from prospective suppliers during the registration process. If you select:
 - Required—Prospective suppliers must provide information for at least one person for each role in the request. If they do not, their request cannot be submitted for approval.
 - Not Required—Prospective suppliers can provide the role information, but the information is not required before the request can be submitted for approval.
 - Optional—Providing the information is optional.
 - 8 Click **Save**.

You have saved registration settings related to reminder emails and contact role collection.

Important: Active Community uses the settings to send reminder emails after the specified number of days have elapsed. It uses the contact collection settings to include the information in a registration request.

Configuring From, To, and Undeliverable Email Addresses

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to specify email addresses used for all registration approval and reminder email messages. You can also define an email addresses for emails that “bounce” due to incorrect email address information. The email address receives the bounced emails and contacts can identify which email addresses are incorrect.

To configure email from, to, and undeliverable addresses

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Email Settings** link.

The Email Settings page opens.

- 3 In From Address, type the email address used as the from address for all registration approval and reminder emails.
- 4 In Reply to Address, type the email address to which all registration request replies are sent.
- 5 In Undeliverables Address, type the email address that is to receive all bounced or returned registration emails.
- 6 Click **Save**.

Customize Document Title for Registration Request Report

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to customize the document title of the registration request report so that it has a specified name when the registration request is downloaded as a PDF.

To customize the document title of the registration request report

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Registration Settings** link to open the Registration Settings page.
- 3 Select the **Use custom report title for Company Registration Report** check box, and enter the name of the title you want to use for the report.

- 4 Click **Save**.

Configuring Anonymous Request Settings

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to configure gateways and email domains so contacts inside and outside the hub community can create anonymous registration requests from a link in an email or web site.

To configure gateways and email domains for anonymous requests

- 1 Click **Applications > Registration > Admin** tab.
- 2 Click the **Anonymous Request Settings** link.

The

The Anonymous Request Settings page opens.

Anonymous Request Settings

Anonymous Requester URL

http://qamercorial.rs.qa.gxsonline.net/anonymous_user_request/11/6f549ea234400a33e67314ff8e28125ea03a05d0

Restrict Access to Companies and Contacts tabs

An anonymous requester can see the Companies & Contacts in the community by checking the below options.

Show Companies Tab

Show Contacts Tab

Gateway IP address(es)

Allow access to visitors accessing the Anonymous Requester Page from the following Gateway IP address(es).

to Add IP Addresses

You may enter a single IP address or a range of addresses.

Validate Anonymous Requester Email Address

Specify text required in domain of the requester's email address

Add Email Domain

Important: Use the Anonymous Requester URL at the top of the page to create an anonymous registration request. The hub posts the link on external websites for Requester contacts who do not have access to Active Community. (The URL is generated when the Registration module is activated.)

- 3 In Restrict Access to Companies and Contacts, select the Show Companies Tab and/or Show Contacts Tab check boxes to indicate if you want anonymous Requester contacts to view those tabs in the request.

Important: This setting lets anonymous Requester contacts view companies and/or contacts to avoid creating duplicate suppliers.

- 4 In Gateway IP Address(es), type one or a range of Gateway IP addresses to allow access to the anonymous requester page, and click **Add IP Addresses**.
- 5 In Validate Anonymous Requester Email Address, type the text required in the domain of the Requester contact's email address, and click **Add Email Domain**.

Note: Only users with specified domain email addresses can create a request.

- 6 Click **Save**.

Assigning the Registration Administrator Role

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to assign the Registration Administrator role to hub contacts.

To assign the registration administrator role

1 Click **Applications > Registration > Admin** tab.

2 Click the **Contact Security Settings** link.

The Contact Security Settings page opens.

3 Select a hub contact.

The Configure Roles page for the selected contact opens. Two sections, Approval Role and Administrative Role, display.

Configure Roles for Shabe Ter

Approval Role

Please select the appropriate role for the contact to pre-qualify or approve new registration requests.

Pre-Approval Role

Approval Role

Administrative Role

Please add this contact to the administrative role. This will allow the contact to address undeliverable email issues and re-assign requests to different approval groups

Admin Role

Cancel SAVE

4 In Administrative Role, select the check box to assign the Registration Administrator role to the contact.

Important: The role allows the contact to address undeliverable email issues and re-assign requests to different approval groups.

5 Click **Save**.

What's Next?

After setting up the Registration module, the hub company can send registration requests to prospective suppliers. For more information, see "[Registration Requests](#)" on page 477

A *registration request* is an electronic form used to gather information about prospective suppliers. The hub customizes the information in a registration request by identifying the types of information it wants to collect from prospective suppliers.

Each registration request includes tabs that contain categories of registration information. The information can include company, contact, product, financial, legal, and other information. For example, a hub might include a custom field named Terms and Conditions as a tab in a request. Prospective suppliers must agree to the hub's terms and conditions before they can be added to the hub's community.

Topics include:

- ["Registration Request Overview" on page 479](#)
- ["Creating a Registration Request" on page 484](#)

Working with Requests

- ["Finding Registration Requests" on page 499](#)
- ["Asking and Responding to Questions" on page 502](#)
- ["Verifying a Tax ID" on page 503](#)
- ["Pre-Approving or Approving a Request" on page 504](#)
- ["Approving Requests in Bulk" on page 505](#)
- ["Putting a Request On Hold" on page 508](#)
- ["Putting Requests On Hold in Bulk" on page 509](#)
- ["Reactivating a Request that is On Hold" on page 511](#)
- ["Reactivating Requests in Bulk" on page 512](#)
- ["Declining a Request" on page 514](#)
- ["Reopening a Request" on page 515](#)
- ["Returning a Request for More Information" on page 515](#)
- ["Recalling and Resending a Request" on page 516](#)
- ["Deleting Registration Requests" on page 517](#)
- ["Downloading a Registration Request as a PDF" on page 519](#)
- ["Canceling a Re-registration Request" on page 518](#)
- ["Resending Registration Emails" on page 520](#)
- ["Correcting Undeliverable Email Addresses" on page 521](#)

- [“Re-submitting Requests Stuck in TGO Provisioning Status” on page 522](#)

Tracking Requests and Using Charts and Reports

- "Using the Registration Dashboard to Track Requests" on page 523
- "View and Download Chart Data" on page 525
- "Working with Registration Custom Exports" on page 527
- "Downloading a Registration Request History Report" on page 534
- "Viewing and Exporting an EIN (Tax ID) Usage Report" on page 535

Registration Request Overview

A registration request is part of an online request and approval process that lets the hub automatically register suppliers in their community. The information contained in the request is specified as the first part of the "Registration Setup" process, "Phase 1: Plan Data to be Collected from Future Suppliers" on page 431.

The graphic shows a sample registration request. The tabs contain information that must be filled in before the request is submitted to or approved by the hub.

REGISTRATION REQUESTS | DASHBOARD | ADMIN

Registration » Requests » View Details

Import test5 Registration Request

Please review the details in the tabs below, complete those marked with a *. Take action as necessary.

Request Details

Company Name: Import test5
Stage: Pre-Approver
Group: PreApprover [view contacts](#) [re-assign](#)
Owner: None
Status: Requested
Request ID: 75
Days Open: 237
Days on Hold: 0
TP Email Language: English

User Details

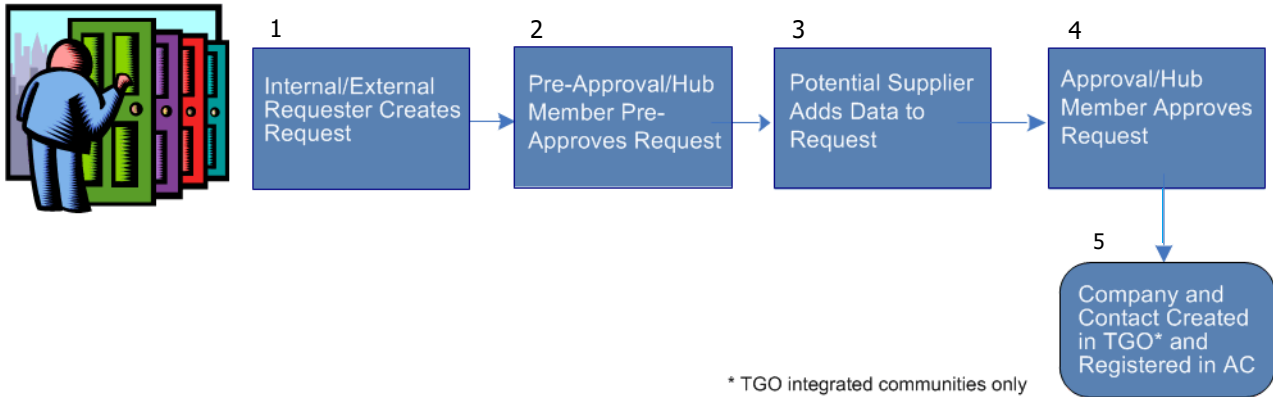
Requester: Import Tester4
Email: actest707+importtester4@gmail.com [edit](#)
Phone: (868) 757-5757
Date Requested: 30 October 2018 00:00:00
Primary Contact: Import Tester4
Email: actest707+importtester4@gmail.com [edit](#)
Phone: (868) 757-5757

Topics include:

- "Request Approval Process" on page 480
- "Registration Request Roles and Contacts" on page 481
- "Request Tabs" on page 482
- "Request Buttons, Roles, and Workflows" on page 483

Request Approval Process

A *registration workflow* drives the online request and approval (commonly referred to as "onboarding") process. For example, a registration request might follow the approval process outlined in the graphic.



Request Approval Process

Key	Description
1	Internal/External Requestor Creates Request
2	Pre-Approval/Hub Member Pre-Approves Request
3	Potential Supplier Adds Data to Request
4	Approval/Hub Member Approves Request
5	Company and Contact Created in TGO (only for TGO integrated communities) and Registered in Active Community

Important: The approval process depends on how a registration workflow is configured for the hub community.

The process starts when an internal or external requester creates a registration request. The following process is typical.

- 1 A Requester creates a request and submits it to the hub community.
Important: A Requester can be an account manager in the hub company or a prospective supplier who clicks a link in an anonymous URL.
- 2 The request is Pre-approved by a contact in the hub community, such as a supply chain manager.
- 3 The request is sent to the supplier’s point-of-contact (Primary Contact). The Primary Contact provides information about themselves and their company when they register. The information might include insurance certificates, contacts in primary business roles, or payment terms.

- 4 The request is Approved by a contact in the hub community, such as a finance manager.
- 5 After approval, for TGO integrated communities only, the trading partner is added to Trading Grid Online. In the hub's community, Active Community creates company and contact profiles for the new partner.
The newly added company or contact can be searched for and located by any member of the community.

Registration Request Roles and Contacts

Your registration role controls the amount of information you see on a registration request. In addition to security roles, registration roles are assigned to contacts in a community.

Important: Pre-Approval and Approval *roles* can be assigned to contacts in the hub community. Requesters and Primary Contacts can be *contacts* inside and outside the hub community.

Requester

Requesters create or submit registration requests. A Requester can be a *contact* inside or outside the hub community, such as a supplier liaison at the hub or a sales representative with a potential supplier.

Pre-Approval Role

The Pre-Approval role reviews registration requests and pre-approves them. After pre-approval, the request moves to the next stage in the registration process. The Pre-Approval role might be assigned to such hub employees as category managers or buyers.

Note: Hub contacts can be assigned a Pre-approval role in addition to their security role.

Primary Contact

A Primary Contact is the main point-of-contact for a company outside the hub community. Primary Contacts receive registration requests from the hub, fill out information in the request, and submit completed requests to the hub company.

Important: By default, all primary contacts have "View Masked Fields" permission; this enables them to see the data for masked company custom fields in the request. See "[Roles and Permissions](#)" on page 49.

Approval Role

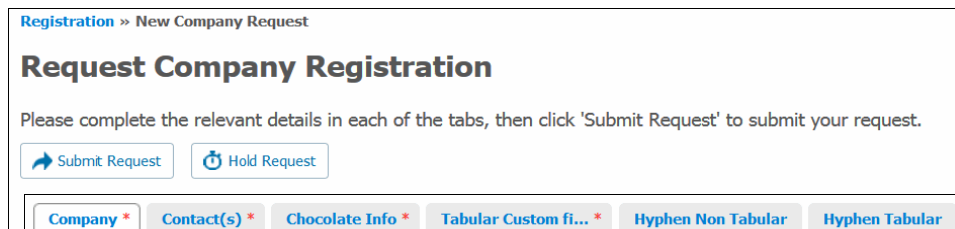
The Approval role validates that a Primary Contact has completed all required details in a registration request. After approval, the trading partner is added to the hub's community. Company and contact profiles are created. The newly added company or contact can be searched for and located by any member of the community.

Note: Hub contacts can be assigned to the Approval role in addition to their security role.

Important: If the Approver does not have "View Masked Fields" permission, they *cannot* see the data for masked company custom fields in the request. See "[Roles and Permissions](#)" on page 49.

Request Tabs

When hub contacts create a request, they fill in information on the following tabs:



The screenshot shows a web interface for 'Request Company Registration'. At the top, it says 'Registration >> New Company Request'. Below that is the title 'Request Company Registration'. A message reads: 'Please complete the relevant details in each of the tabs, then click 'Submit Request' to submit your request.' There are two buttons: 'Submit Request' and 'Hold Request'. At the bottom, there is a row of tabs: 'Company *', 'Contact(s) *', 'Chocolate Info *', 'Tabular Custom fi... *', 'Hyphen Non Tabular', and 'Hyphen Tabular'.

Company Tab

The Company tab is used to specify company information about the prospective supplier. At a minimum, the requester must provide the name of the prospective company that is being asked to register with the hub company.

Important: An initial request is completed by someone internally (an employee of the hub) or externally (the potential new company).

Contact(s) Tab

Before a request is submitted, the Contact(s) tab is used to provide details about the primary contact at the prospective supplier. This person receives the email with a link to the registration forms. Required fields: First Name, Last Name, Email, and Phone number.

After a request is submitted, the Contact(s) tab displays additional fields. The fields allow the hub to provide additional address and phone information for the primary contact and to select additional business roles.

After a request is submitted, the tab allows the hub to add additional contacts such as accounts payable, EDI, sales, or legal contacts. The contact that is designated as the primary contact can also be changed.

Custom Field Group Tabs

Multiple custom field tabs can display based on the custom field permissions assigned to registration roles.

Each tab represents a custom field group designed by the hub to gather information for the initial request. For example, a hub might have forms around Certificate of Insurance, Terms & Conditions, EDI, Diversity Classification Information, Shipping Returns, Invoicing, etc.

Specialized Tax ID (EIN) Custom Field

Tax ID (EIN) is a specialized custom field that allows hubs to collect a federal tax ID and verify that it is correctly formatted as an EIN (Employer Identification Number). The value is *not* verified unless you have the Tax ID Verification option enabled for your community. To enable the option, contact Support.

Note: Custom field forms are designed by clicking Company > Settings > Custom Fields. The hub decides which forms to include in the request using Applications > Registration > Admin tab > Manage Permissions (see ["Custom Fields" on page 221](#) and ["Registration Setup" on page 423](#)).

After a hub contact clicks Submit, *additional* tabs display on the new request page so the information can be reviewed before the request is sent.

Finance Help Registration Request

Please review the details in the tabs below, complete those marked by a *. Take action as necessary.

✓ Approve Request ✕ Decline Request ↻ Hold Request ▾ More

Request Questions Company * Contact(s) * ✓ Chocolate Info Tabular Custom fi... * SCF Group

Tabular SCF Group Hyphen Non Tabular Hyphen Tabular

Request Tab

The Request tab shows all details for the request, including the contact who created the request, the contact who approved the request, the number of days it has been open, and when it was created, submitted, and approved. The tab also contains information that indicates if the request has been returned for more information or it was declined. The language that was selected by the requestor or pre-approver for sending out TP emails is displayed.

Questions Tab





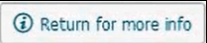




The Questions tab is used by contacts in the Primary Contact and Pre-Approval roles to ask and respond to questions while completing a registration request. Questions might be around why the hub needs such a high insurance amount, if certain information is necessary, or even a discussion to negotiate some of the terms. For more information, see ["Asking and Responding to Questions" on page 502.](#)

Request Buttons, Roles, and Workflows

Action buttons might or might not display in a registration request based on:

- Your role in the registration process
- How the hub's:
 - Registration workflow is configured
 - Note:** Applications > Registration > Admin tab > Configure Overall Workflow
 - Approval levels are configured
 - Note:** Applications > Registration > Admin tab > Configure Approvals, Manage Approval Groups, Contact Security Settings, and Map Approval Groups to Approval Roles
- The workflow phase the request is in
- Actions done by others to the request

The table lists the reasons an action button might *not* display in a registration request.

For this Button to Display	You Must Have this Role	The button does NOT display if:	
		In the workflow, the...	The request is not ready/other...
Approve Request 	<ul style="list-style-type: none"> Pre-Approval Approval 	Approve action is not selected. OR In Approval Levels, the Pre-Approval and Approval levels are skipped.	The request is not ready for approval. Example: If a request does not include business contact information from the Primary Contact, it cannot be <i>approved</i> until the information is provided.
Decline Request 	<ul style="list-style-type: none"> Pre-Approval Primary Contact Approval 	Decline action is not selected.	The request is not ready to be declined. Example: If a request to modify a company's certification information has already been approved by another Approver in your community, it cannot be declined by you.
Put Request on Hold 	<ul style="list-style-type: none"> Requester Pre-Approval Approval 	Hold action is not selected.	
Reactivate a Request 	<ul style="list-style-type: none"> Requester Pre-Approval Approval 	Hold action is not selected (the Hold action controls both the Hold and Reactivate buttons)	
Return for More Information 	<ul style="list-style-type: none"> Pre-Approval Primary Contact Approval 	Return action is not selected.	The request is not ready to be returned. Example: If a request does not include business contact information from the Primary Contact, it cannot be <i>returned</i> for more information until the information is provided.
Recall Request 	<ul style="list-style-type: none"> Pre-Approval 	Request's status is not "Assigned to Primary Contact"	
Reopen Request 	<ul style="list-style-type: none"> Requester Pre-Approval 	<ul style="list-style-type: none"> Re-Open action is not selected. Request's status not "Declined" 	
Re-register Request 	<ul style="list-style-type: none"> Registration Administrator 	The company is not being re-registered.	
Cancel Re-registration 	<ul style="list-style-type: none"> Registration Administrator 	The company is not being re-registered.	

Creating a Registration Request

There are several ways registration requests can be created:

- By a hub contact with access to Active Community
- By a contact outside the hub who has access to an anonymous URL

- By importing registration requests into Active Community and specifying a registration status and request approval stage

The contact who adds a request is considered the Requester contact in the registration approval process.

Note: Requests can also be made by a Community Administrator sending a registered company back through registration (that is, re-registration).

Topics include:

- ["Creating a Request" on page 485](#)
- ["Creating a Request Using an Anonymous URL" on page 492](#)
- ["Importing Registration Requests Using CSV Files" on page 493](#)

Creating a Request

Registration role: Requester at the hub company

Use this procedure to create a registration request. By creating a request, a hub contact becomes the Requester contact in the registration approval process.

Note: The hub can design its registration process to collect legal profile information at the same time it collects company information. If collected during registration (see [step 3](#) in this procedure), the trading partner company is created for the hub, and the legal profile is created for AIC.

To add a registration request

1 Do one of the following:

- Click **Applications > Registration**.

The Requests for My Approval page opens to the Registration Requests tab. Continue with [step 2](#).

- If the Registration Administrator is re-registering a company, and has successfully initiated a request for re-registration from Base (Profiles > Companies), go to [step 9 on page 488](#) to move the request forward to activate the Re-registration process.

2 Click **Add Request**.

The Request Company Registration page opens.

Registration >> New Company Request

Request Company Registration

Please complete the relevant details in each of the tabs, then click 'Submit Request' to submit your request.

Submit Request Hold Request

Company * Contact(s) * Test * Tabular Group * rk nontab * Organization Info... PraveenTest

Company Details

* Company Name

Web Site

Email

Phone

Fax

Address

Address 2

Address 3

City

State / Province / Region

Postal Code

Country

Employees

TGO Service

Notes

Legal Profile Form

TP Email Language

Next

3 On the Company tab, type the required information for the prospective company, then click **Next**.

Note the following:

- For TGO integrated communities only, the TGO Service field displays. This field is used to select a pre-defined invitation code. To populate this list or see a list of existing TGO invitation codes, see ["Managing TGO Invitation Codes" on page 434](#).

Employees

TGO Service *

Notes

Active Orders - 992618785

Active Community and DQC - 5197619678

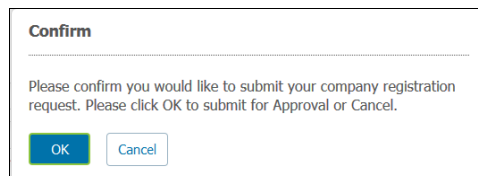
Demo Service - 1234

- To include legal profiles in the registration process, select the legal profile for the trading partner's country from the drop-down list. The legal profile form must be published to display on the list.
- TP Email Language - From the drop-down list of languages that Active Community supports, select the language you want the system to use when sending out trading partner registration emails. You can select

different languages for different trading partners. The selected language displays on the **Request** tab. The default language is English.

Note:

- The hub needs to configure the registration email in a supported specific language before the trading partner can see the email in the selected language. For details, see ["Configuring an Email in a Different \(Supported\) Language" on page 460](#).
 - The selected language is only valid for TP registration emails. For all other communication with the TP (for example, activities and other emails from the hub), the language selected by the trading partner is used.
 - The "TP Email Language" field is available for Registration custom export under the Registration Company Details group (see ["Working with Registration Custom Exports" on page 527](#)).
- 4 On the Contact(s) tab, type the required information for the primary contact at the prospective company, then click **Next**.
 - 5 On the remaining tabs, type the required information, then click **Next**.
 - 6 Do one of the following:
 - Put the request on hold - After you have added all required information, if you are not ready to submit the request, you can put the request on hold. See ["Putting a Request On Hold" on page 508](#).
 - Submit the request - Continue with step 7.
 - 7 On the last tab, click **Submit Request**.
A confirmation dialog opens.



- 8 Click **OK** to submit the request.
A New Company Request is created. The page displays additional tabs, such as Questions so you can provide additional information in the request. On the

Contact(s) tab, you can add additional information for the primary contact, as well as add additional contacts.

REGISTRATION REQUESTS | DASHBOARD | ADMIN

Registration » Requests » View Details

Import test5 Registration Request

Please review the details in the tabs below, complete those marked by a *. Take action as necessary.

Request Details

Company Name: Import test5

Stage: Pre-Approver

Group: PreApprover [view contacts](#) [re-assign](#)

Owner:

Status: Requested

Request ID: 75

Days Open: 237

Days on Hold: 0

TP Email Language: English

User Details

Requester: Import Tester4

Email: actest707+importtester4@gmail.com [edit](#)

Phone: (868) 757-5757

Date Requested: 30 October 2018 00:00:00

Primary Contact: Import Tester4

Email: actest707+importtester4@gmail.com [edit](#)

Phone: (868) 757-5757

- 9 Before you start the registration request approval process, review and revise any information in the request.

Note: If you are not ready to start the approval process, you can put the request on hold. See ["Putting a Request On Hold" on page 508](#).

To...	Do this...
Download a PDF for your records	<ul style="list-style-type: none"> ■ Click Download PDF.
Start a conversation	<ol style="list-style-type: none"> 1 Click the Questions tab. 2 Go to "Asking and Responding to Questions" on page 502.
Verify a tax ID	<ol style="list-style-type: none"> 1 Click the Custom Field Group tab that contains the Specialized Tax ID (EIN) custom field that has been enabled for verification. Only one Specialized Tax ID (EIN) custom field can be enabled for verification at a time. 2 Go to "Verifying a Tax ID" on page 503. <p>Note: To take advantage of the Tax ID Verification option, it must be enabled for your community. Contact Support for assistance.</p>

Refer to the following table to make changes on the Request tab.

The screenshot shows the 'Import test5 Registration Request' page. At the top, there are navigation links for 'REGISTRATION REQUESTS', 'DASHBOARD', and 'ADMIN'. Below that, the breadcrumb 'Registration > Requests > View Details' is visible. The main heading is 'Import test5 Registration Request'. A message states: 'Please review the details in the tabs below, complete those marked by a *. Take action as necessary.' Below this message are four buttons: 'Approve Request' (checked), 'Decline Request', 'Hold Request', and 'More'. There are four tabs: 'Request' (active), 'Contact(s)', 'Questions', and 'Company'. The 'Request' tab contains the following details:

- Request Details:**
 - Company Name: Import test5
 - Stage: Pre-Approver
 - Group: PreApprover (with links for 'view contacts' and 're-assign')
 - Owner: None (dropdown menu)
 - Status: Requested
 - Request ID: 75
 - Days Open: 237
 - Days on Hold: 0
 - TP Email Language: English
- User Details:**
 - ster: Import Tester4
 - Email: actest707+importtester4@gmail.com (with 'edit' link)
 - Phone: (868) 757-5757
 - Date Requested: 30 October 2018 00:00:00
 - Primary Contact: Import Tester4
 - Email: actest707+importtester4@gmail.com (with 'edit' link)
 - Phone: (868) 757-5757

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a 'Next' button in the bottom right corner.

To...	Do this...
Assign an owner to the request	<ol style="list-style-type: none"> 1 Click the Request tab. 2 In Owner, select an owner from the drop-down list. 3 Click OK in the Change of Owner confirmation dialog box. 4 Click Save.
Assign a request to a different approval group	<ol style="list-style-type: none"> 1 Click the Request tab. 2 In Group, click the re-assign link. 3 Select the group. 4 Click OK. 5 Click Save.
Review members in an approval group	<ol style="list-style-type: none"> 1 Click the Request tab. 2 In Group, click the view contacts link. 3 Click OK.
Change the Primary Contact email address	<ol style="list-style-type: none"> 1 Click the Request tab. 2 Under User Details, click edit for Email. 3 Update the email address. 4 Click Save.

Refer to the following table to make changes on the Contact(s) tab.

Request
Questions
Company *
Contact(s) *
Custom Fields *
Demo Specialized ...

Confirm the main contact for your company and provide any missing information. Add additional contacts below, and ensure that there is a contact for every required business role. ✓ Save Changes

Primary Contact

First Name*

Email*

Company

Last Name*

Phone*

Title

Business Role(s) *Marked Business Role(s) are mandatory for atleast one contact.

Contact*

[Additional Information](#) ▾

Additional Contacts

Add Contacts for the following role(s): + Add Additional Contact

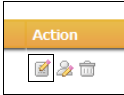

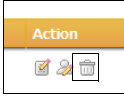
Roles

Contact*

Contact Name	Email ID	Business Role	Action
Joe Dozier	joe.dozier@opentext.com	Contact	

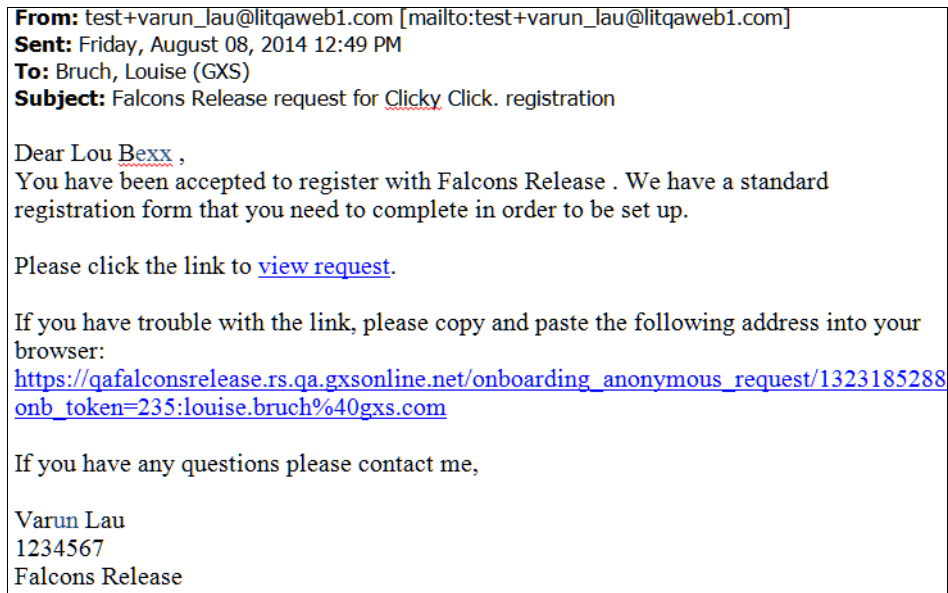
« Previous
Next »

To...	Do this...
Change primary contact information	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Primary Contact, update primary contact information, and click Save.
Select additional business roles for the primary contact	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Primary Contact, select the business role(s) you want to associate with the primary contact. 3 Click Save.
Add additional address and phone information for primary contact.	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Primary Contact, click the Additional Information link. 3 Add additional information for the primary contact 4 Click Save.
Add contacts to the request Note: Contacts added to the request are registered in Active Community when the request is approved.	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Additional Contacts, click Add Additional Contact. 3 Type the required information. 4 Click Save.

To...	Do this...
<p>Edit an additional contact's information. You can also:</p> <ul style="list-style-type: none"> ■ Add business roles for the contact ■ Add additional address and phone information for the contact 	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Additional Contacts, click the Edit icon for the name of the contact you want to edit.  <ol style="list-style-type: none"> 3 Type and/or select your changes. 4 Click Save.
<p>Assign a different contact as the primary contact for the request</p> <p>Note: This option is not available when re-registering a company.</p>	<ol style="list-style-type: none"> 1 Click the Contacts tab. 2 Under Additional Contacts, click the Make this Contact as Primary Contact icon for the name of the contact you want to make the primary contact.  <ol style="list-style-type: none"> 3 Click OK in the Make Primary Contact confirmation dialog box. 4 Click Save.
<p>Delete an additional contact from the request</p>	<ol style="list-style-type: none"> 1 Click the Contact(s) tab. 2 Under Additional Contacts, click the Delete icon for the name of the contact you want to delete.  <ol style="list-style-type: none"> 3 Click OK in the Delete Contact confirmation dialog box.

10 Click Approve Request.

Active Community sends the appropriate email notifications, including an email to the Primary Contact. The email contains a link to the request so the Primary Contact can complete the request form and submit it back to the hub.



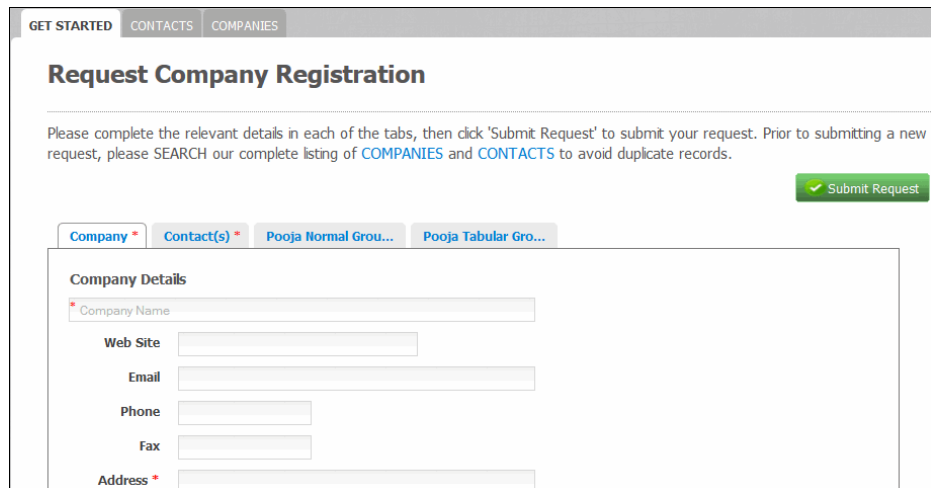
Creating a Request Using an Anonymous URL

Use this procedure to create a registration request from a URL posted on a web site or given to you in an email. By creating a request, the person becomes the Requester contact in the registration approval process.

To create a registration request

- 1 Copy and paste the URL into your browser window.

The Get Started tab opens to the registration request.



- 2 On the Company tab, type the required information for your company, then click **Next**.
- 3 On the Contact(s) tab, type the required information for the primary contact at the company, then click **Next**.

- 4 On the remaining tabs, type the required information, then click **Next**.
- 5 On the last tab, click **Submit Request**.
A confirmation dialog opens for the anonymous request.

Confirm

Confirm you would like to submit your Company Registration Request. Please enter your own details, so we can keep you updated with progress on the request.

First Name Last Name

Email Phone

Your Company Name

- 6 Type your name, email address, phone number, and company name in the fields, then click **OK** to submit the request.
You are notified by email when the request moves to the next stage in the approval process.

Importing Registration Requests Using CSV Files

You can import new registration requests into the Registration module by using a file saved in comma separated value (CSV) format. You must adhere to the guidelines for importing company and contact information described in ["Importing Companies and Contacts Using CSV Files"](#) on page 128.

Note: Import cannot be used to update registration requests.

General Import Requirements Summary

Here is a *high-level* summary of .csv file requirements:

- The first row of the file (header row) must contain the same column headings that are mandatory in the user interface.
 - For example, for contacts, it would be Last Name, First Name, Communication Email, and Company ID. User ID is only mandatory when using the import to update profiles.
 - For example, for companies, it would be Company Name and Company ID.
- The data values to be imported must start in the second row of the file (body rows). For example, Jones, Bob, bob.jones@example.com, CFO, ABC123, mycomp_id.

	A	B	C	D	E	F
1	Last Name	First Name	Communication Email	Title	Company Name	Company ID
2	Jones	Bob	bob.jones@example.com	CFO	ABC123	mycomp_id
3	Smit	John	john.smit@example.com	Sales Director	ABC123	mycomp_id
4	Dexter	Lea	lea.dexter@example.com	Operations Supervisor	ABC123	mycomp_id
5	Potter	Silas	silas.potter@example.com	Community Admin	ABC123	mycomp_id

The parts of the file:

Key	Description
1	Header row.
2	Body row.

- Upper or lower case letters can be used for most values. Only custom field values are case sensitive.
- Use commas, tabs, or pipes to separate the information in each column.

Registration Import Requirements

The fields included in a .csv file depend on the stage and status (Open, On Hold, Declined, Completed) to which you want to import the requests, as well as the information included in the registration request.

These fields are required in the .csv file:

- Basic information about the Primary Contact, Requester, and Company:

- | | | |
|-------------------|------------------------|-----------------------|
| ■ Primary Contact | ■ Requester | ■ Company |
| ■ First Name | ■ Requester First Name | ■ Company Name |
| ■ Last Name | ■ Requester Last Name | ■ Company Address |
| ■ Email | ■ Requester Email | ■ Company City |
| ■ Phone | ■ Requester Phone | ■ Company State |
| | ■ Requester Company | ■ Company Postal Code |
| | ■ Requested Date | ■ Company Country |
| | ■ Assigned Date | ■ Company Phone |

- All required custom fields that the hub configured as mandatory for a request.
- Unless the Auto Generate Company IDs field is selected for the hub (Admin > Community Settings), Company ID must be included.
- To specify which legal profile to assign to a trading partner in a .csv file, use the identifier for the legal profile found in the first column of the Provisioning Configuration list page (**Admin > Legal Profile** tab). Map the identifier to the Legal Profile Form field during the import process.

Registration Import Requirements for Tabular Data

You can import tabular data during registration by using a file saved in comma separated value (CSV) format.

In addition to following the ["General Import Requirements Summary" on page 493](#) and the ["Registration Import Requirements" on page 494](#), you must adhere to these requirements:

- The first body row of a given company of the file is for non-tabular data.
- The company name needs to be repeated for all rows of the tabular data.

Note: The company name must be in the first column of the file.

- Tabular data can be entered beginning with the second body row for a given company.

A	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY
Company Name	Radio Button List	True/False	Yes/No	Text	Number	Date	Text Area	Email	Tax ID	TB Qopp List	TB Multiple Choice	TB True/False	TB Yes/No
TestCompany1902_1	Test1	True	Yes	Text	12345	02/07/2019	textarea	actest707+1902_1@gmail.com	11-1111111				
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1											Test1,Test2	True	Yes
TestCompany1902_1										Test1		True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_1										Test1	Test1	True	Yes
TestCompany1902_2	Test_2	False	No	Text2	987654	02/07/2019	textarea	actest707+1902_1@gmail.com	11-1111111				
TestCompany1902_2										Test1	Test1	False	No
TestCompany1902_2											Test1,Test2	False	No
TestCompany1902_2										Test2		False	No
TestCompany1902_2										Test2	Test1,Test2	False	No
TestCompany1902_2										Test2	Test1,Test2	False	No
TestCompany1902_2										Test2	Test1,Test2	False	No
TestCompany1902_2										Test2	Test1,Test2	False	No

In this example,

- The company name is in the first column of the file.
- Body row 2 (the first body row for the first company, TestCompany1902_1) contains all the non-tabular data for the first company.
- The first company, TestCompany1902_1, is repeated in column A for all the rows of tabular data for that company (rows 3-14).
- Tabular data for TestCompany1902_1 begins in column AV in the second body row for the company (row 3) and continues in subsequent columns AW, AX, AY, etc. and subsequent rows 4-14.
- Body row 15 (the first body row for the second company, TestCompany1902_2) contains all the non-tabular data for the second company.
- The second company, TestCompany1902_2, is repeated in column A for all the rows of tabular data for that company (rows 16-23).
- Tabular data for TestCompany1902_2 begins in column AV in row 16 and continues in subsequent columns AW, AX, AY, etc. and subsequent rows 17-23.

Importing Registration Requests in a .csv File

Security roles: Community Administrator

Permissions:

- Company Permissions > Import Companies
- Contact Permissions > Import Contacts

When importing a .csv file, you are prompted to map or link each **column header** in your .csv file to a **field** that exists in the registration request. The column heading might be the name of a core field, such as Last Name, or it might be a custom field specific to your community, such as Hire Date. If a non-required field is *not* included in the .csv file, you select IGNORE for that field when mapping the fields in the request to the fields in the .csv file.

Use this procedure to import registration requests using a .csv file.

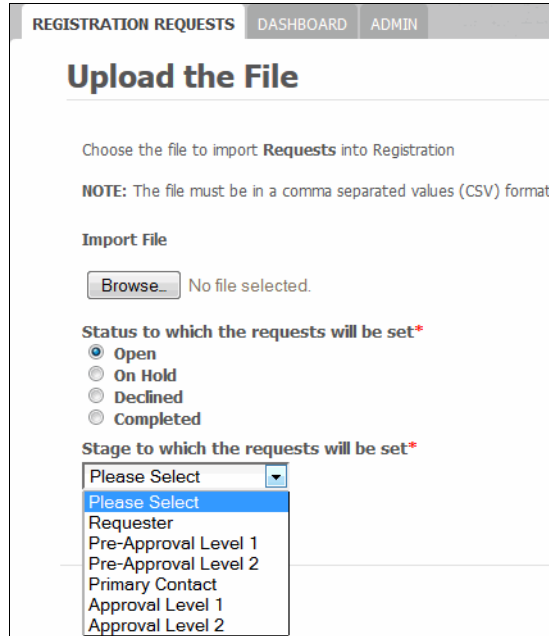
To import registration requests using a .csv file

- 1** Click **Applications > Registration**.

The Registration Requests tab opens.

- 2** Click **Import**.

The Upload the File page opens.



- 3** In Import File, click **Browse** to navigate to the file location, select the file, and click **Open**.
- 4** In Status, select a status, such as Open, On Hold, Declined, or Completed, to which you want the new requests set.
- 5** (Optional). Do one of the following to set the workflow stage to which you want the requests set:
 - If Open is selected, select Requester, Primary Contact, Pre-Approval, or Approval.
 - If On Hold is selected, select Requester, Pre-Approval, or Approval.
- 6** Click **Next**.

The Map the Fields page opens.

F	G	H	I	J	K
Requester First Name	Requester Last	Requester Email	Requester Phone	Requester Company	Company Name
Louise	Bruce	lbruch@opentext.com	404 467 3793	OpenText	KitKat
James	Bond	jbond#mi6.com	44 1932 776380	British Intelligence	Goldfinger
Ray	Dickens	ray.dickens@abc.com	768 333 5678	Acme Trading	Asia Emports

REGISTRATION REQUESTS DASHBOARD ADMIN

Map the Fields

1 2 3 4 Step 2 of 4

You now need to tell us which fields map to the data in the Registration database.

Request Details

Registration Field	Import Field
Requested Date * →	IGNORE
Assigned Date * →	IGNORE
Company ID →	IGNORE
Parent Company ID →	IGNORE
Hold Reason * →	IGNORE
Requester First Name * →	Requestor First Name
Requester Last Name * →	Requestor Last Name
Requester Email * →	Requestor Email
Requester Phone * →	Requestor Phone
Requester Company * →	Company Name

Company Details

Registration Field	Import Field
Company Name * →	Company Name
Company Web Site →	IGNORE
Company Email →	IGNORE

When you import a .csv file that contains tabular data, the Map the Field page contains sections for tabular data as well.

company_link_2 →	IGNORE
email_2 →	email_2
tax_id_2 →	tax_id_2

Tabular

Registration Field	Import Field
TB Drop List →	TB Drop List
TB Multiple Choice →	TB Multiple Choice
TB True/False →	TB True/False
TB Yes/No →	TB Yes/No
TB Text →	TB Text
TB Number →	TB Number
TB Date →	TB Date
TB Text Area →	TB Text Area
TB Company Link →	IGNORE

- 7 In the drop-down lists, specify the required, core and custom fields in your .csv file that correspond to the fields in the user interface.

Note: IGNORE is the default value for any core or custom fields that do not automatically match a column header value in the .csv file. If a field is not included in the .csv file because you are not importing it, keep the default IGNORE setting for that field.

- 8 Click **Next**.

The Preview Import page opens. It shows the values for the first row of your .csv file mapped to the fields in the registration request.

F	G	H	I	J	K
Requester First Name	Requester Last	Requester Email	Requester Phone	Requester Company	Company Name
Louise	Bruce	lbruch@opentext.com	404 467 3793	OpenText	KitKat
James	Bond	jbond#mi6.come	44 1932 776380	British Intelligence	Goldfinger
Ray	Dickens	ray.dickens@abc.com	768 333 5678	Acme Trading	Asia Emports

Preview import 1 2 3 4

Step 3 of 4

Sample Data to be Imported

Request Details	Data
Requested Date	10/31/2014
Assigned Date	
Company ID	ytytyt
Parent Company ID	
Requester First Name	Louise
Requester Last Name	Bruce
Requester Email	lbruch@opentext.com
Requester Phone	4044673793
Requester Company	OpenText
Company	
Company Name	KitKat
Web Site	
Email	123@dd.com

The Preview Import for tabular data displays.

Tabular							
	TB Drop List	TB Multiple Choice	TB True/False	TB Yes/No	TB Text	TB Number	TB Date
1	Test1	Test1	True	Yes	text	13245	02/07/2019
2		Test1, Test2	True	Yes	text	13245	02/07/2019
3	Test1		True	Yes	text	13245	02/07/2019
4	Test1	Test1		Yes	text	13245	02/07/2019
5	Test1	Test1	True		text	13245	02/07/2019
6	Test1	Test1	True	Yes		13245	02/07/2019
7	Test1	Test1	True	Yes	text		02/07/2019
8	Test1	Test1	True	Yes	text	13245	
9	Test1	Test1	True	Yes	text	13245	02/07/2019
10	Test1	Test1	True	Yes	text	13245	02/07/2019
11	Test1	Test1	True	Yes	text	13245	02/07/2019
12	Test1	Test1	True	Yes	text	13245	02/07/2019

tabular_2							
	tb_drop_list_2	tb_multiple_choice_2	tb_true_false_2	tb_yes/no_2	tb_text_2	tb_number_2	tb_date_2
1	test1	test1	True	Yes	text	13245	02/07/2019
2		test1, test2	True	Yes	text	13245	02/07/2019
3	test1		True	Yes	text	13245	02/07/2019
4	test1	test1		Yes	text	13245	02/07/2019

9 Click **Next**.

The Import Queue page opens. It notifies you that your import file was added to the queue for processing.

Import Queue 1 2 3 4

Step 4 of 4

Your information has been added to the import queue.

This process may take a while. You may navigate away from this page while we continue with the import.

We will email you once the import is complete.

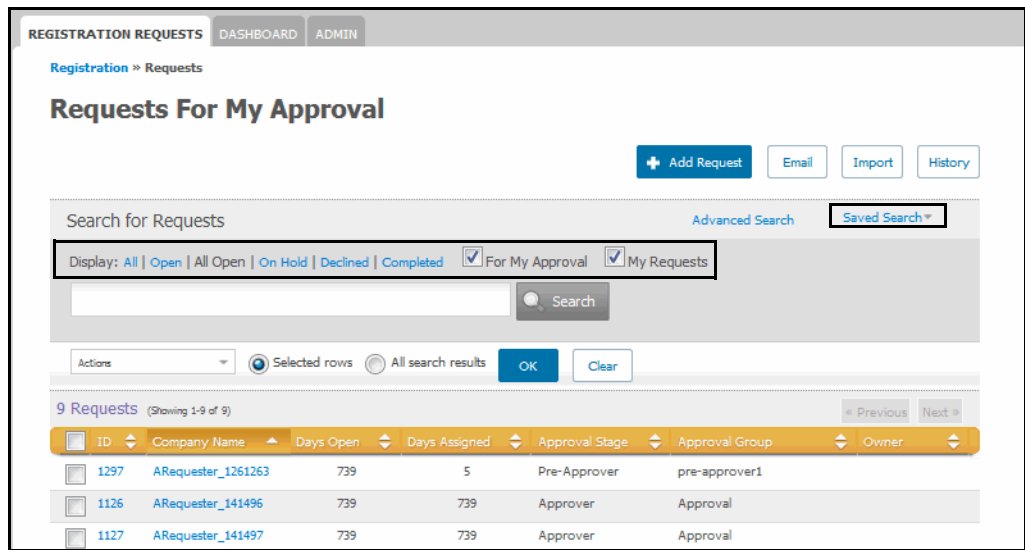
After processing the file, Active Community sends you an email that details the number of rows that were successfully or unsuccessfully imported.

10 (Optional) In the email, click **Download Reject CSV File**, and review the Error Messages column for hints about how to fix the invalid data.

Finding Registration Requests

Use the search links at the top of the Registration Requests tab to monitor and manage your registration list. By default, you see Open requests in your lists. To view requests in any other completion or ownership status (On Hold, Declined,

Completed, For Your Approval, etc.), you must change the filter criteria on your request list.



Use this procedure to find requests using different search criteria.

Note: You can also access your request list by clicking a link to a request in an email.

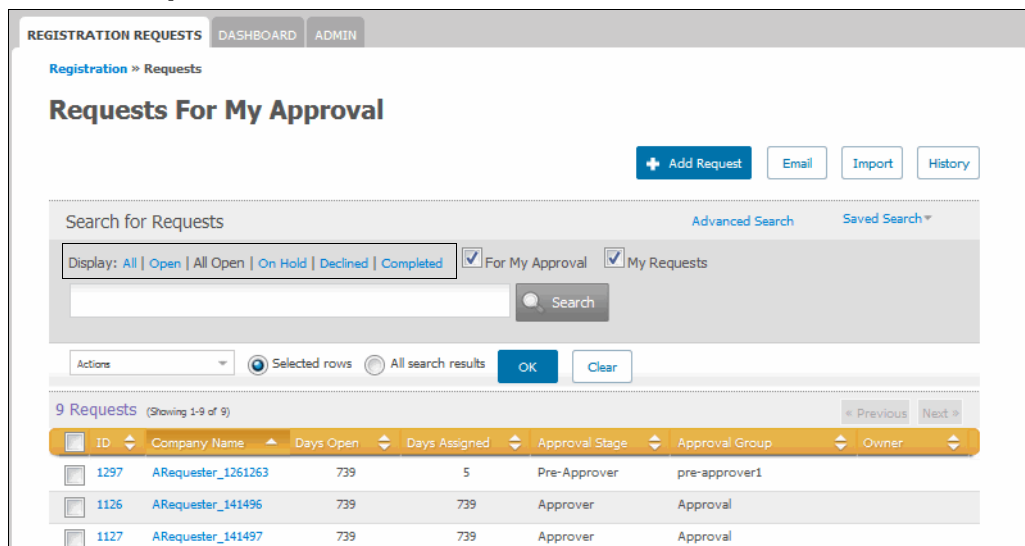
To find registration requests

1 Click **Applications > Registration**.

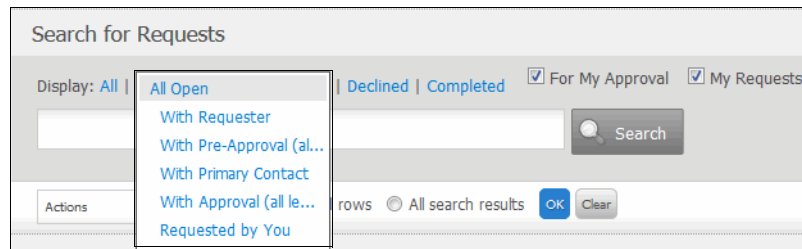
The Registration Requests tab opens. Because the For My Approval and My Requests check boxes are selected, the page lists Open requests you need to pre-approve or approve and requests you created.

2 To change the filter on your request list, perform the appropriate action:

- To find all requests or requests by status, click **All**, **On Hold**, **Declined**, or **Completed**.



- To find open requests by registration role or requests you created, click **Open**, then select the role the request is open with based on the hub's approval process.



Options include:

- **Requester** contact
 - **Pre-Approval** role (all levels)
 - **Primary Contact**
 - **Approval** role (all levels)
 - **Requested by You**
- To sort requests by Days Open, Days Assigned, or Approval stage, click a column heading. For example, you might want to sort the registration request list by Days Assigned to identify any approval delays or by Declined to view all declined requests so you can review and re-submit them.
 - To sort requests by dates, custom field values, status, etc, click Advanced Search (see ["Advanced Searches"](#) on page 93.)

The page lists requests based on your search criteria.

- 3 To act on a request, click its link and go to the appropriate procedure:
 - ["Asking and Responding to Questions"](#) on page 502
 - ["Verifying a Tax ID"](#) on page 503
 - ["Resending Registration Emails"](#) on page 520
 - ["Pre-Approving or Approving a Request"](#) on page 504
 - ["Approving Requests in Bulk"](#) on page 505
 - ["Putting a Request On Hold"](#) on page 508
 - ["Putting Requests On Hold in Bulk"](#) on page 509
 - ["Reactivating a Request that is On Hold"](#) on page 511
 - ["Reactivating Requests in Bulk"](#) on page 512
 - ["Declining a Request"](#) on page 514
 - ["Reopening a Request"](#) on page 515
 - ["Returning a Request for More Information"](#) on page 515
 - ["Recalling and Resending a Request"](#) on page 516
 - ["Deleting Registration Requests"](#) on page 517
 - ["Resending Registration Emails"](#) on page 520

- “Correcting Undeliverable Email Addresses” on page 521
- “Re-submitting Requests Stuck in TGO Provisioning Status” on page 522

Asking and Responding to Questions

The Primary Contact and Pre-Approval roles can use the Questions tab to ask and respond to questions about the request. Files can be attached to the question.

Note: Asking and responding to questions does not send emails. If approvals are skipped, the Questions tab cannot be used.

Topics include:

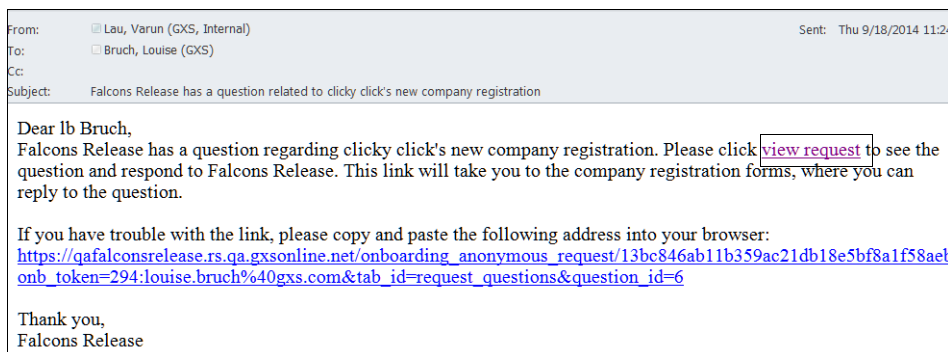
- “Asking Questions About a Registration Request” on page 502
- “Responding to Questions (Pre-Approval Role)” on page 502
- “Closing Request Conversations” on page 503

Asking Questions About a Registration Request

As a Primary Contact, use this procedure to ask a question about a request.

To ask questions about a request

- 1 Click the **view request** link in the request email to access the request.



- 2 In the registration request, click the **Questions** tab.
- 3 Click **Start a Question**.
- 4 In Subject and Question, type the subject and text of the question.
- 5 If needed, click **Browse** to attach a file to the request.
- 6 Click **Send Question**.

The Pre-Approval role receives an email that states a question has been posted.

Responding to Questions (Pre-Approval Role)

You might need to respond to questions as part of the request process.

To respond to questions in a request

- 1 If you receive an email that indicates a Primary Contact asked a question related to a request, log in to Active Community, find and open the request, and click the **Questions** tab to post a reply.

- 2 Find the question asked by the Primary Contact, and click **Post**.
- 3 Type your answer to the question.
- 4 If needed, click **Browse** to attach a file to your response.
- 5 Click **Post Your Reply**.

Your response is sent to the Primary Contact who asked the question, who must click the **view request** link in the email to view your reply.

Closing Request Conversations

Important: When a request is registered, all questions must be closed. If they are not, the contact in the Approval role receives a validation error.

To close a conversation

- 1 Follow the instructions in “Finding Registration Requests” on page 499 to find the request with questions that need to be closed.
- 2 In a registration request, click the **Questions** tab.
- 3 Find the question you want to close, and select the **Question Closed** check box.

A screenshot of a user interface element titled "Question Closed". It contains a single checkbox with the label "Check when the question has been resolved". The checkbox is currently unchecked.

The question is closed. If the request is at the final Approval stage, the company can be registered.

Verifying a Tax ID

The Specialized Tax ID (EIN) custom field allows hubs to collect a federal tax ID and verify that it is correctly formatted as an EIN (Employer Identification Number). The value is *not* verified unless the Tax ID Verification option is enabled for your community. To enable the option, contact Support.

After the Tax ID Verification option is enabled for your community, you can use a Specialized Tax ID (EIN) custom field in your registration request, and verify the Tax ID using the Verify Tax ID link.

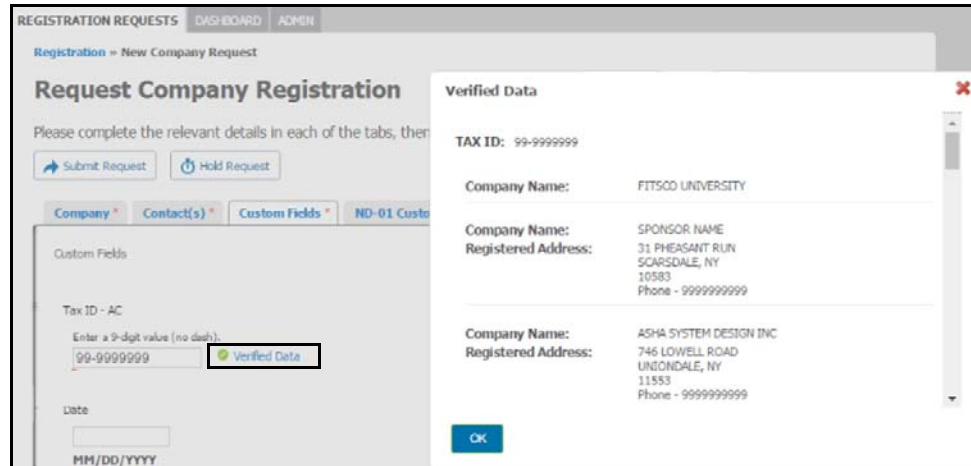
A screenshot of a registration form interface. At the top, there are tabs for "Company *", "Contact(s) *", "Custom Fields *", "ND-01 Custom Group", "Tabular Field Group *", and "dependent Custom ...". The "Custom Fields" tab is selected. Below the tabs, the text "Custom Fields" is displayed. Underneath, there is a field labeled "Tax ID - AC *". Below this field is the instruction "Enter a 9-digit value (no dash)." and an input box. To the right of the input box is a blue link with a magnifying glass icon labeled "Verify Tax ID". Below the input box and link is a button labeled "Tax ID not verified".

To verify a tax ID (EIN)

- 1 After a Tax ID is entered in the Tax ID custom field, **click Verify Tax ID**. The system attempts to verify the tax ID.
- 2 One of the following occurs:

- The Tax ID is not valid. A message displays saying that the Tax ID cannot be found. You can correct the tax ID and click Verify Tax ID again.
- The Tax ID is valid. The Verified Data pop-up opens and displays the details associated with the Tax ID.

The verified data is then accessible on the Company tab, the Request tab, and the Custom Fields tab, so you can copy it from the pop-up window and use it to fill in the request form.



Pre-Approving or Approving a Request

Registration role: Pre-Approval, Approval

Use this procedure to pre-approve or approve a registration request.

Important: Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows"](#) on page 483).

To approve a request

1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists Open requests you need to approve and requests you created.

2 Click the link for the request you want to approve, review the information, and do one of the following:

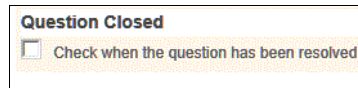
- Pre-approver - Click **Approve Request**.
- Approver - Click **Register Request** (or click **Re-register a Request** if the request is a subsequent registration (re-registration)).

3 At the confirmation message, click **OK**.

The request moves to the next phase in the registration approval process. If a registration request is:

- *Pre-approved* - the request is sent to the prospective supplier's Primary Contact to collect information about the company and business contacts.

- *Approved* - the company is registered in your community. A company profile is added to your Companies list and any contact profiles are added to your Contacts list. The link in the original registration request becomes inactive.
- 4 For final approvals, before the request is registered, the approver must ensure:
 - The Question Closed check box is selected in the request. The check box indicates a question has been resolved. To select the check box:
 - 1 Go to the request.
 - 2 Click the **Question** tab.
 - 3 Select **Question Closed**.

A screenshot of a form element titled "Question Closed". It contains a single checkbox with the label "Check when the question has been resolved". The checkbox is currently unchecked.

The question is closed. If the request is in the final Approval stage, the company can be registered.

- If a company ID is not created automatically, the Approval role must enter the Company ID and/or the Parent Company ID when registering the request.

Note: If the Auto-generate Company ID check box is selected under Admin > Community Settings, Active Community creates the Company ID automatically.

Approving Requests in Bulk

Security roles: Community Administrator and/or Registration Administrator

Use this procedure to approve more than one registration request at a time (in bulk).

Note: Approving requests in bulk is available only for TGO integrated communities.

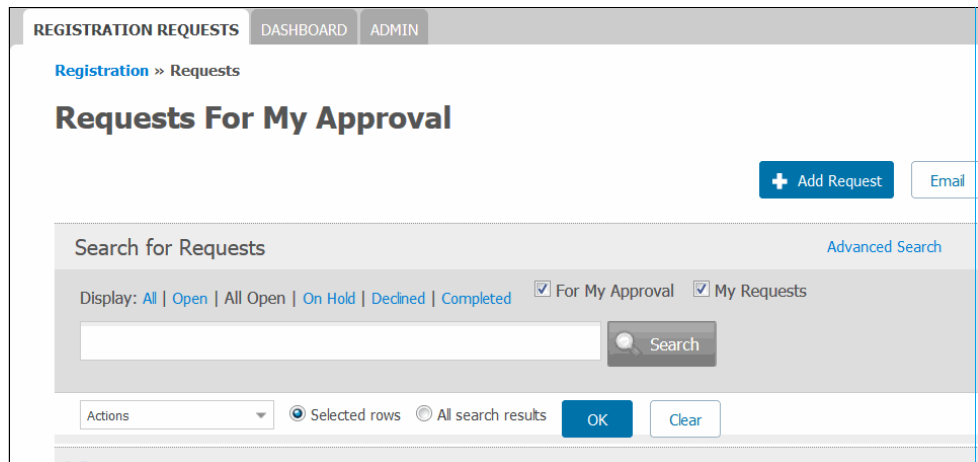
Requirements and limitations for using this feature include:

- OpenText must enable it for your community.
- Bulk approval of registration requests is allowed only when the **Auto-generate Company IDs** check box is selected (Admin > Community Settings tab).
- Bulk approval only works for requests in the Approval stage (for example, moving between approver levels or completing the final registration).

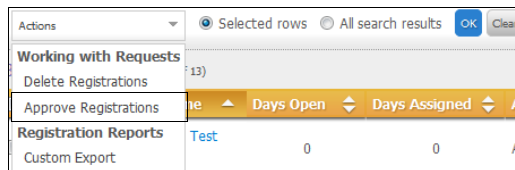
To approve requests in bulk

- 1 Click **Applications** > **Registration**.

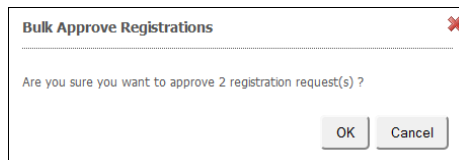
The Registration Requests tab opens. The page lists Open requests you need to approve and requests you created.



- 2 Do one of the following:
 - Select check box(es) for the requests you want to approve.
 - Search for the requests you want to approve. Select **All Search Results**. This allows you to select more results than are displayed on the first page.
- 3 From the Actions drop-down list, select **Approve Registrations**, and click **OK**.




A dialog box opens and asks you to confirm the approval of the selected registration requests.



- 4 Click **OK** to approve the selected registration requests. A message indicates that the registration request(s) have been submitted for approval.
- 5 The Request for My Approval page displays an icon for each request that has been submitted for bulk approval. Rollover text displays, "In Approval Process."

ID	Company Name	Days Open	Days Assigned
14	Cmp64264210	26	
104	Cmp642642100	26	
15	Cmp64264211	26	
16	Cmp64264212	26	
17	Cmp64264213	26	

If you try to submit a request (s) that has already been submitted, a message displays to indicate that the request (s) is in progress and cannot be re-submitted for approval.

 The following requests are in progress and could not be submitted for approval:
14, 104

When the system completes processing the requests, it sends you an email.

----- Forwarded message -----
From: <falconrelease512+sgun@gmail.com>
Date: Tue, Dec 23, 2014 at 5:15 PM
Subject: Active Community Registration Process Complete: Falcons514
To: falconrelease512+ssajan@gmail.com

Dear Sajjan Barla contact,

Your approval request has been processed

1 requests have been successfully approved.

1 requests have been rejected.

Rejected Approve Request File can be downloaded by clicking the following link
[Rejected Approve Request File](#)

Your file will be available from this link for 7 days before being deleted.

Thanks,
The Active Community Team.

The email contains the number of requests that have been successfully approved, the number of requests that have been rejected (if any), and a link to a file that contains details of the rejected requests.

The file is available for 7 days before being deleted.

The request moves to the next phase in the registration approval process. If a registration request is:

- Between approval levels, it moves to the next approval level.
 - In the final approval level, the request is registered in your community. A company profile is added to your Companies list (Profiles > Companies > Directory tab) and any contact profiles are added to your Contacts list. The link in the original registration request becomes inactive.
- 6** For final approvals, before the request is registered, the approver must ensure:
- The Question Closed check box is selected in the request. The check box indicates a question has been resolved. To select the check box:
 - 1** Go to the request.
 - 2** Click the **Question** tab.
 - 3** Select **Question Closed**.

Question Closed

Check when the question has been resolved

The question is closed. If the request is in the final Approval stage, the company can be registered.

Putting a Request On Hold

Registration role: Requester at the hub company, Pre-Approval, Approval

Use this procedure to put a registration request on hold, for example, if you need to obtain more information. Putting a request on hold applies only to requests in the Requestor, Pre-approval, or Approval stages (for example, before the request is submitted or for a request in the pre-approver or approver stages).

Important: The Hold button displays only if the Hold action has been activated in the registration workflow (See ["Phase 2: Design a Registration Workflow"](#) on page 438)

Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows"](#) on page 483).

Cumulative Days on Hold

If you put a registration request on hold, reactivate it, and then put it on hold again, the Days on Hold number that displays in Request Details is the cumulative number of days that the request was on hold during its lifetime in the registration workflow.

The screenshot shows a web interface for 'Request Details'. At the top, there are tabs: 'Request', 'Questions', 'Company', 'Contact(s)', and 'Custom Fields-1 n...'. The 'Request' tab is active. Below the tabs, the 'Request Details' section contains the following information:

- Company Name: ABCD Comp
- Stage: Approval
- Group: Approver-1 [view contacts](#) [re-assign](#)
- Owner: None (dropdown menu)
- Status: Submitted
- Request ID: 296
- Days Open: 11
- Days on Hold: 2 (highlighted with a red box)

To put a request on hold

- 1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

- 2 Find requests that you want to put on hold by changing your filter settings as described in ["Finding Registration Requests"](#) on page 499.

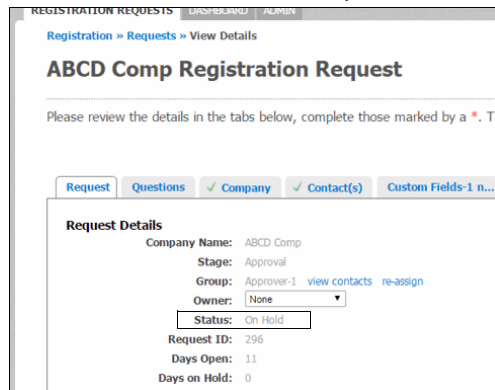
- 3 Click the link for the request you want to put on hold, and click **Hold**.

- 4 In the Confirm dialog box, type the reason for putting the request on hold.

This reason is available in the Registration Request History Report (see ["Downloading a Registration Request History Report"](#) on page 534) as well as the registration custom export (see ["Creating General Settings for a Registration Custom Export"](#) on page 528).

- 5 Click **OK**.

A message indicates that the registration request has been put on hold. The status indicates that the request is on hold.



One of the following occurs:

- If the request is in the pre-approval or approval stage, an email notification is sent to each contact in that approval group (for example, all Pre-Approval 1 contacts or all Approval 2 contacts) notifying them that the request is on hold.
- If the request is in the Requestor stage, the requestor does not receive an email notification.

Note: Only a user in the same group level as the user who put the request on hold can reactivate the request (see [“Reactivating a Request that is On Hold” on page 511](#)).

Putting Requests On Hold in Bulk

Registration role: Requester at the hub company, Pre-Approval, Approval

Use this procedure to put on hold more than one registration request at a time (in bulk). Putting a request on hold applies only to requests in the Requestor, Pre-approval, or Approval stages (for example, before the request is submitted or for a request in the pre-approver or approver stages).

Important: The Hold button displays only if the Hold action has been activated in the registration workflow (see [“Phase 2: Design a Registration Workflow” on page 438](#)).

Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see [“Request Buttons, Roles, and Workflows” on page 483](#)).

Cumulative Days on Hold

If you put a registration request on hold, reactivate it, and then put it on hold again, the Days on Hold number that displays in Request Details is the cumulative

number of days that the request was on hold during its lifetime in the registration workflow.

Request Details

Company Name: ABCD Comp

Stage: Approval

Group: Approver-1 [view contacts](#) [re-assign](#)

Owner: None

Status: Submitted

Request ID: 296

Days Open: 11

Days on Hold: 2

To put requests on hold in bulk

1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists Open requests you need to approve and requests you created.

REGISTRATION REQUESTS DASHBOARD ADMIN

Registration > Requests

Requests For My Approval

+ Add Request Email Import History

Search for Requests [Advanced Search](#) [Saved Search](#)

Display: All | Open | All Open | On Hold | Declined | Completed For My Approval My Requests

Search

Actions Selected rows All search results OK Clear

8 Requests (Showing 1-8 of 8) Previous Next

ID	Company Name	Days Open	Days Assigned	Approval Stage	Approval Group	Owner
41	10001	17	17	Pre-Approval Level 1	Pre-Approval	
42	101 aa reg	14	14	Pre-Approval Level 1	Pre-Approval	
56	company name	11	11	Approval	Approval	
52	final req	11	11	Approval	Approval	
49	Finance Help	12	0	Pre-Approval Level 1	Pre-Approval	
46	Sameer test	14	14	Pre-Approval Level 1	Pre-Approval	

2 Do one of the following:

- Select check box(es) for the requests you want to put on hold.
- Search for the requests you want to put on hold. Select **All Search Results**. This allows you to select more results than are displayed on the first page.

3 From the Actions drop-down list, select **Hold**, and click **OK**.

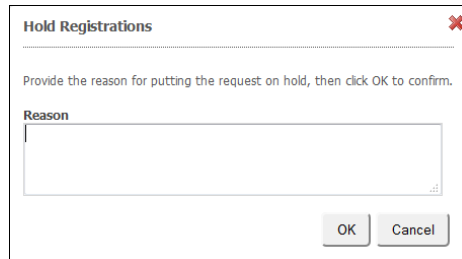
Actions Selected rows All search results OK Clear

Working with Requests

- Delete Registrations
- Approve Registrations
- Hold**
- Reactivate
- Registration Reports
- Custom Export

4 In the Hold Registrations dialog box, type a reason for putting the selected registration requests on hold.

This reason is available in the Registration Request History Report (see ["Downloading a Registration Request History Report" on page 534](#)) as well as the registration custom export (see ["Creating General Settings for a Registration Custom Export" on page 528](#)).



5 Click **OK**.

A message indicates that the registration request(s) have been put on hold.

One of the following occurs:

- If the request(s) are in the pre-approval or approval stage, an email notification is sent to each contact in that approval group (for example, all Pre-Approval 1 contacts or all Approval 2 contacts) notifying them that the request(s) are on hold. A separate email is sent for each request that was put on hold.
- If the request is in the Requestor stage, the requestor does not receive an email notification.

Note: Only a user in the same group level as the user who put the request on hold can reactivate the request (see ["Reactivating a Request that is On Hold" on page 511](#)).

Reactivating a Request that is On Hold

Registration role: Requester at the hub company, Pre-Approval, Approval

Use this procedure to reactivate a registration request that has been put on hold. The request must have a Hold status. Only a user in the same group level as the user who put the request on hold can reactivate the request.

Important: The Reactivate button displays only if the Hold action has been activated in the registration workflow (see ["Phase 2: Design a Registration Workflow" on page 438](#)).

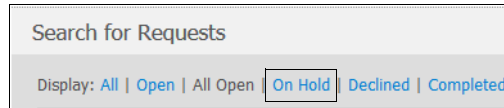
Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows" on page 483](#)).

To reactivate a request

1 Click **Applications** > **Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

2 Under Search for Requests, click **On Hold**.

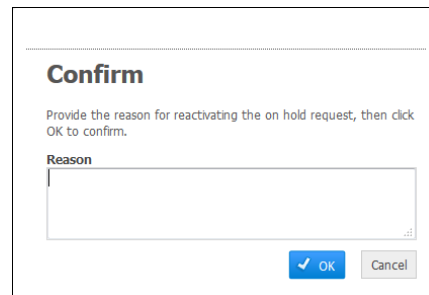


The page lists On Hold requests that can be reactivated (see also ["Finding Registration Requests" on page 499](#)).

3 Click the link for the request you want to reactivate, and click **Reactivate**.

4 In the Confirm dialog box, type the reason for reactivating the request.

This reason is available in the Registration Request History Report (see ["Downloading a Registration Request History Report" on page 534](#)) as well as the registration custom export (see ["Creating General Settings for a Registration Custom Export" on page 528](#)).



5 Click **OK**.

A message indicates that the registration request has been reactivated.

One of the following occurs:

- If the request is in the pre-approval or approval stage, an email notification is sent to each contact in that approval group (for example, all Pre-Approval 1 contacts or all Approval 2 contacts) notifying them that the request is reactivated.
- If the request is in the Requestor stage, the requestor does not receive an email notification.

Reactivating Requests in Bulk

Registration role: Requester at the hub company, Pre-Approval, Approval

Use this procedure to reactivate more than one registration request (in bulk) that has been put on hold. The requests must have a Hold status. Only a user in the same group level as the user who put the requests on hold can reactivate the requests.

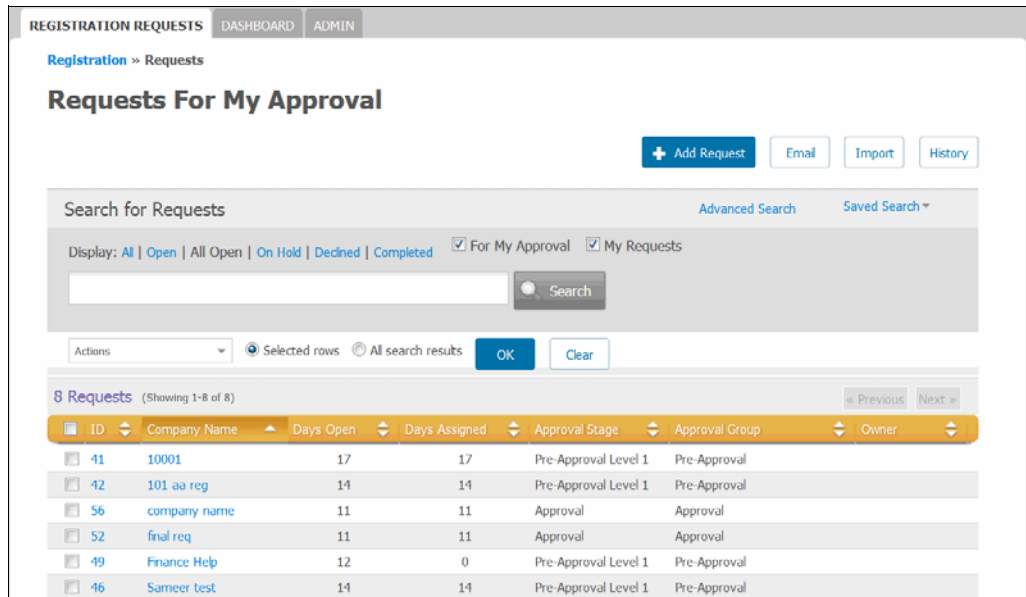
Important: The Reactivate button displays only if the Hold action has been activated in the registration workflow (see ["Phase 2: Design a Registration Workflow" on page 438](#)).

Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows" on page 483](#)).

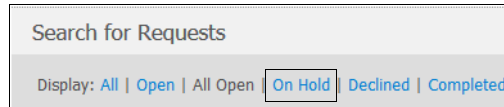
To reactivate requests in bulk

1 Click Applications > Registration.

The Registration Requests tab opens. The page lists Open requests you need to approve and requests you created.



2 Under Search for Requests, click On Hold.

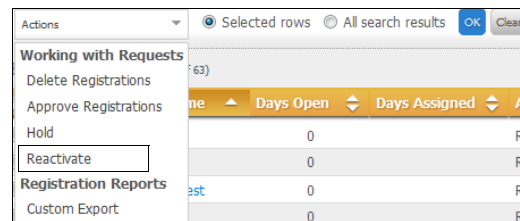


The page lists On Hold requests that can be reactivated (see also ["Finding Registration Requests"](#) on page 499).

3 Do one of the following:

- Select check box(es) for the requests you want to reactivate.
- Search for the requests you want to reactivate. Select **All Search Results**. This allows you to select more results than are displayed on the first page.

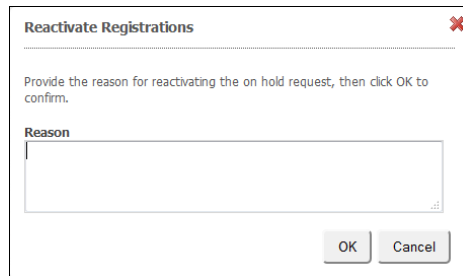
4 From the Actions drop-down list, select Reactivate, and click OK.



5 In the Reactivate Registrations dialog box, type a reason for reactivating the selected registration request(s).

This reason is available in the Registration Request History Report (see ["Downloading a Registration Request History Report"](#) on page 534) as well as

the registration custom export (see ["Creating General Settings for a Registration Custom Export"](#) on page 528).



6 Click **OK**.

A message indicates that the registration request(s) have been reactivated.

One of the following occurs:

- If the request(s) are in the pre-approval or approval stage, an email notification is sent to each contact in that approval group (for example, all Pre-Approval 1 contacts or all Approval 2 contacts) notifying them that the request(s) are reactivated. A separate email is sent for each request that was reactivated.
- If the request is in the Requestor stage, the requestor does not receive an email notification.

Declining a Request

Registration role: Pre-Approval, Primary Contact

Use this procedure to decline a registration request, for example, if the company or contact already exists in your community or the prospective supplier is not optimal. Depending on your settings, the original requester might be able to reopen the request.

Important: Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows"](#) on page 483).

To decline a request

Note: If you are a primary contact for a prospective supplier and decide to decline a request, open the link in the registration request email, and click **Decline Request**.

1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

2 Find requests that you want to decline by changing your filter settings as described in ["Finding Registration Requests"](#) on page 499.

3 Click the link for the request you want to decline, review the information, and click **Decline Request**.

4 At the confirmation message, click **OK**.

The request moves to the next phase in the registration approval process. If a request is *declined*, it is sent back to the previous request stage, such as back to the Requester or to the prospective supplier's Primary Contact. Depending on workflow settings, registration requests can be re-submitted after they have been declined.

Reopening a Request

Registration role: Requester, Pre-Approval

If a registration request was declined, it can be reopened and re-submitted if you are the original Requester or are in a Pre-Approval role, such as a procurement director or category manager. For example, procurement might want to reopen, edit, and re-submit a request to register a new supplier if the original request was declined by the supplier's Primary Contact.

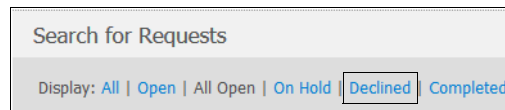
Important: Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows"](#) on page 483).

To reopen a declined request

1 Click **Applications** > **Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

2 Under Search for Requests, click **Declined**.



The page lists declined requests that can be reopened (see also ["Finding Registration Requests"](#) on page 499).

3 Click the link for the request you want to reopen, modify the information, and click **Reopen Request**.

4 At the confirmation message, click **OK**.

The request moves to the next phase in the registration approval process. If a request is *reopened*, it is sent to the next person in the registration process, typically the Pre-Approval role or the Primary Contact at the prospective supplier.

Returning a Request for More Information

Registration role: Pre-Approval, Primary Contact

Use this procedure to return a registration request to the previous person in the process, such as the original Requester (buyer, sales representative, or member of your community), a Pre-Approval role (category manager, supplier relations) or the

Primary Contact at the prospective supplier to be registered. You are prompted to provide a reason why the request is being returned for more information.

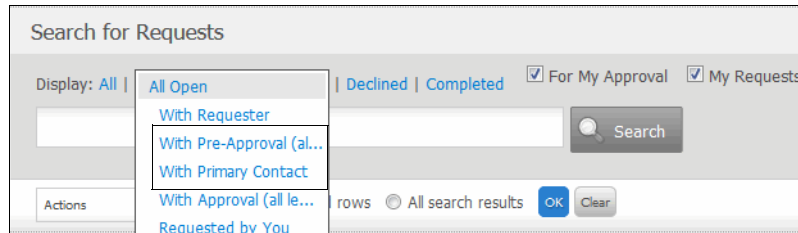
Important: Depending on your role and the part of the approval process the request is in, you might see different buttons in the request (see ["Request Buttons, Roles, and Workflows"](#) on page 483).

To return a request for more information

- 1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

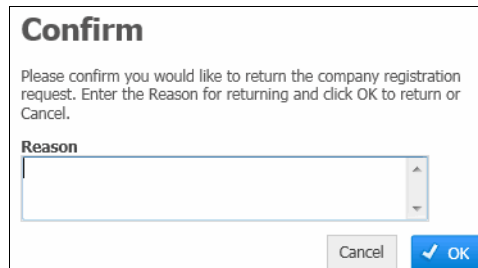
- 2 Under Search for Requests, click **Open > With Pre-Approval (all levels)** or **Open > With Primary Contact**.



The page lists requests that are open (see also ["Finding Registration Requests"](#) on page 499).

- 3 Click the link for the request you want to return, review the information, and click **Return for More Information**.

A confirmation dialog opens.



- 4 Type the reason the request is being returned, and click **OK**.

The request moves to the next phase in the registration approval process. If a request is *returned*, the person who submitted the request (or someone else with the same role, such as procurement or finance) can open and edit the request, provide more information, and send the request back for review.

Recalling and Resending a Request

Registration role: Pre-Approval and Registration Administrator

Use this procedure to send a request back to yourself so you can edit any information that might be incorrect, such as the Primary Contact’s email address.

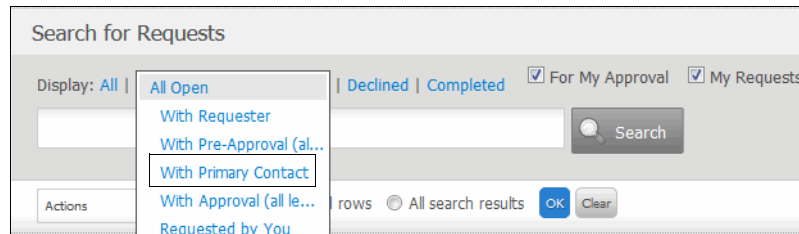
By recalling a request, you move it back to the Pre-Approval stage. After recalling a request, you can update information in the request and resend it to a Primary Contact.

To recall and resend a request

1 Click **Applications > Registration**.

The Registration Requests tab opens. The page lists open requests you need to approve and requests you created.

2 Under Search for Requests, click **Open > With Primary Contact**.



The page lists requests that are open and with the Primary Contact (see also [“Finding Registration Requests” on page 499](#)).

3 Click the link for the request you want to recall, review the information, and click **Recall Request**.

A message indicates the request was recalled successfully.

Important: The request is sent back to the Pre-approval role, such as the category manager or supplier relations.

4 To find the recalled request, click **Open > Pre-Approval**.

5 Click the request’s link to determine why it was not completed by the prospective supplier, such as an incorrect email address.

6 Correct the information, click **Save**, and click **Approve Request**.

The email with the link to the request is sent to the Primary Contact.

Deleting Registration Requests

Security roles: Community Administrator and/or Registration Administrator

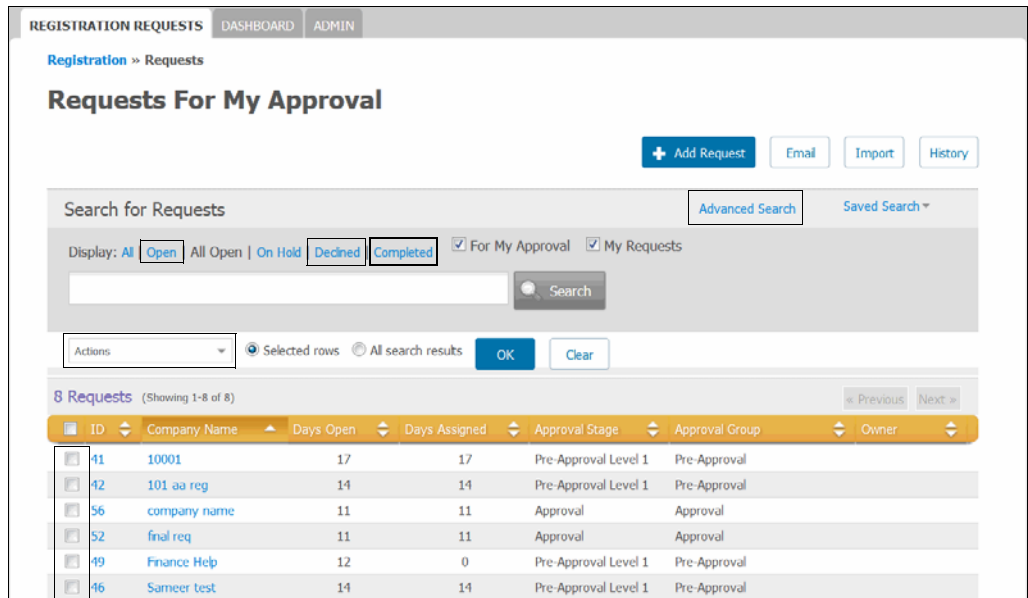
You can delete registration requests that are no longer needed. The requests must have an Open, Declined, or Completed status.

Note: When a registration is deleted, the related company profile is no longer eligible for re-registration.

To delete a registration request

1 Click **Applications > Registration**.

The Requests for My Approval page opens.



- 2 At the top of the page, perform the appropriate action:
 - Click **Declined**, **Open**, or **Completed** to search for requests that were declined, are still open, or are complete.
 - Click **Advanced Search**, provide additional search criteria, and search for Declined, Open, or Completed requests.
- 3 Select check box(es) for the requests you want to delete.
- 4 From the Actions drop-down list, select **Delete Registrations**, and click **OK**. A dialog box opens and asks you to confirm the deletion of the selected registration requests.
- 5 Click **OK** to delete the selected registration requests. A message indicates the request(s) were deleted.

Note: When a registration is deleted, the related company profile is no longer eligible for re-registration.

Canceling a Re-registration Request

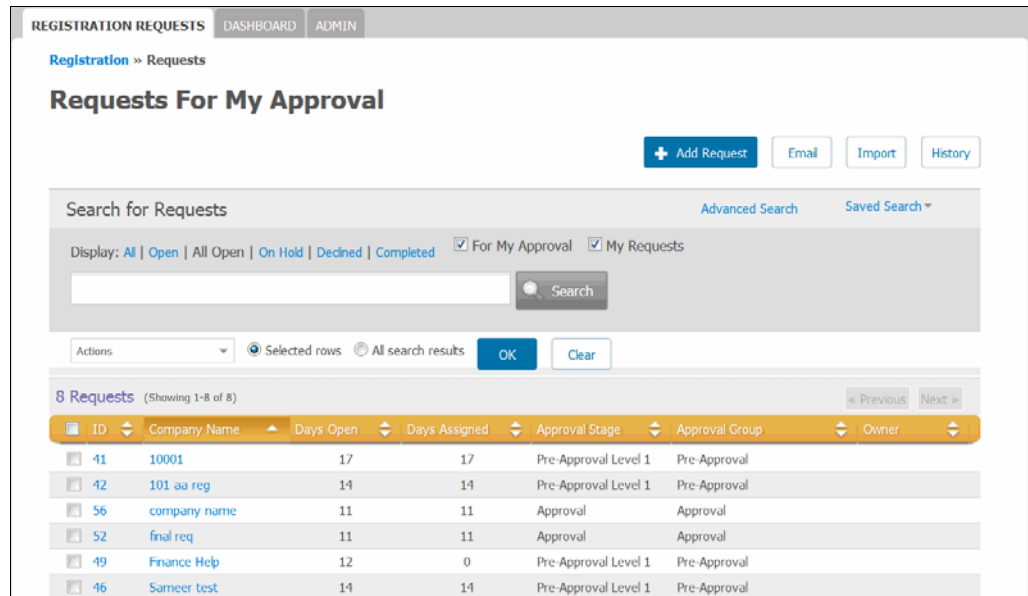
Security roles: Requestor and/or Registration Administrator

You can cancel a re-registration request which results in unlocking the company profile in the directory.

To cancel a registration request

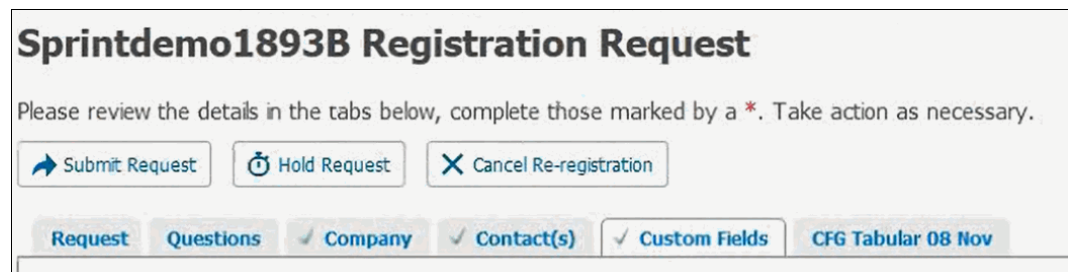
- 1 Click **Applications > Registration**.

The Requests for My Approval page opens.



- 2 Search for and click on the name of the company whose re-registration you want to cancel.

The company's registration request page opens.



- 3 Click **Cancel Re-registration**.

A dialog box opens and asks you to confirm the cancellation of the selected re-registration request.

- 4 Click **OK** to cancel the selected re-registration request.

A message indicates the request was canceled. The company profile in Base is unlocked.

Downloading a Registration Request as a PDF

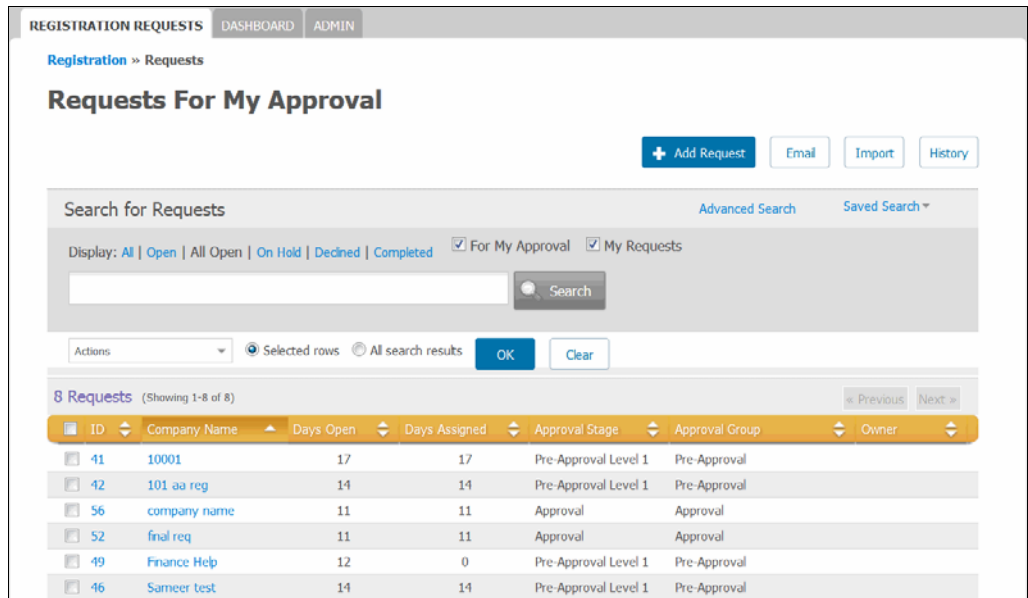
Security roles: Requestor and/or Registration Administrator

You can download a registration request as a PDF.

To download a registration request as a PDF

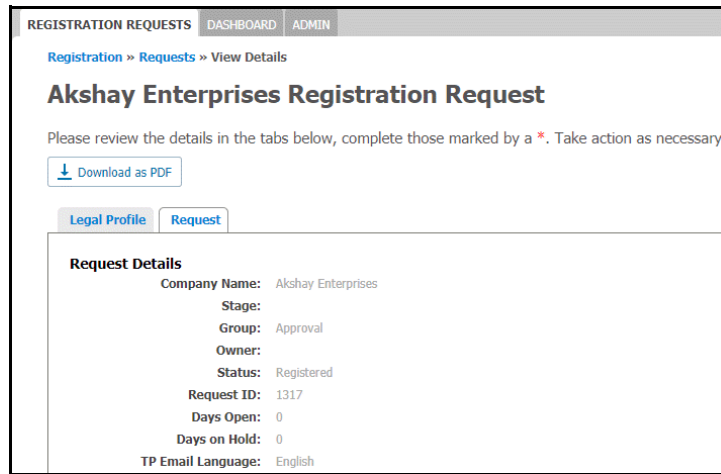
- 1 Click **Applications > Registration**.

The Requests for My Approval page opens.



- 2 Search for and click on the name of the company whose registration you want to download.

The company's registration request page opens.



- 3 Click **Download as PDF** (which might display in the **More** drop-down list). Check your Download folder for the file, or click the **Open file** link to view it.

Note: To customize the name of the document title in the PDF, see ["Customize Document Title for Registration Request Report" on page 473.](#)

Resending Registration Emails

Security roles: Community Administrator and/or Registration Administrator

You can resend a copy of the original registration email to Primary Contacts and/or the Pre-approvers/approvers. The emails remind contacts they need to respond to a registration request to complete it, approve it, or add more information to it.

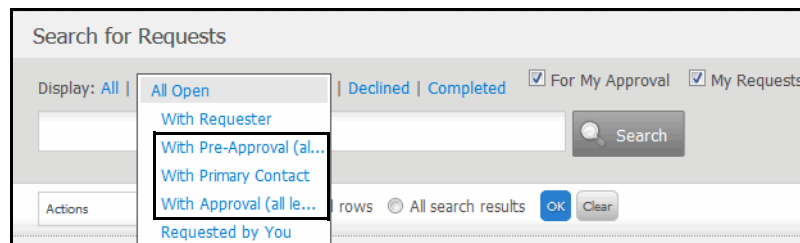
Note: Up to three reminder messages can be defined (see [“Defining Reminder Email Settings”](#) on page 470). The content in reminder emails can be customized (see [“Reminder Email Templates”](#) on page 454).

To resend a request

1 Click **Applications > Registration**.

The Registration Requests tab opens.

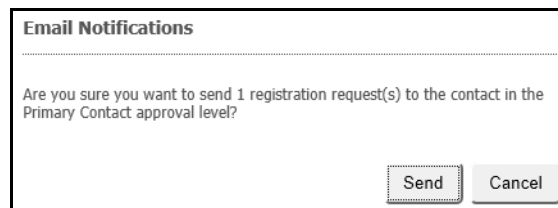
2 Under Search for Requests, click **Open > With Pre-Approval (all levels), With Primary Contact, or With Approval (all levels)**.



The page lists open requests for the selected role (see also [“Finding Registration Requests”](#) on page 499).

3 Click **Email**.

A confirmation message asks if you want to send registration requests to the contact(s) in the selected role.



4 Click **Send**.

The email is sent.

Correcting Undeliverable Email Addresses

Registration role: Pre-Approval, Approval

When prospective suppliers do not respond to prompts for information, the delay might be caused because incorrect email addresses for Primary Contacts were specified in the request. In addition, email notifications can “bounce” back to the sender due to unexpected, obsolete, or incorrect email address information.

Note: The email address that receives all bounced or returned registration emails is defined during Registration setup (see [“Configuring From, To, and Undeliverable Email Addresses”](#) on page 472).

To correct an email address for a primary contact

- 1 Click **Applications > Registration**.

The Requests for My Approval page opens.

- 2 Find the request for the email address you want to correct, and click its link (see "Finding Registration Requests" on page 499).

The request opens to the Request tab.

The screenshot shows a web interface with tabs for Request, Questions, Company, Contact(s), and Pooja Norma. The 'Request Details' section includes: Company Name: Acme Office Supplies; Stage: Pre-Approval Level 1; Group: Pre Approval 1 with links for view contacts and re-assign; Owner: None; Status: Requested; Request ID: 286; Days Open: 3. The 'User Details' section includes: Requester: Sajjan Barla; Email: qafalcons+sajjan@gmail.com; Phone: (231) 231-2213; Date Requested: 11 May 2015 20:32:33. Under 'Pre-Approval Level 1', it lists Sajjan Barla with the same email and phone. The 'Primary Contact' section lists Jim Doe with email jmdoe@gmail.com (with an 'edit' button) and phone (632) 657-1983.

- 3 Under User Details, click **edit** for Email.

The Change Primary Contact Email dialog opens.

The dialog box is titled 'Change Primary Contact Email'. It contains the text: 'Change the Primary Contact's email address and click "Save" to change the Email of primary contact.' Below this is a text input field labeled 'Primary Contact Email Address' containing 'qafalcons+company@gmail.com'. At the bottom are two buttons: 'Save' and 'Cancel'.

- 4 Update the email address, and click **Save**.

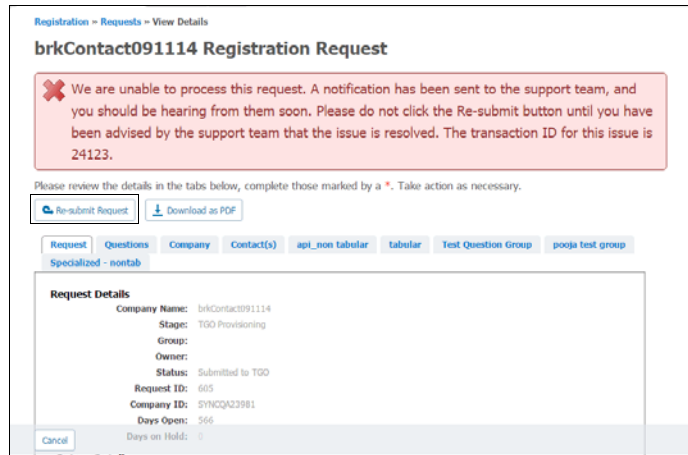
Re-submitting Requests Stuck in TGO Provisioning Status

Customers with Active Community/Trading Grid Online (TGO) integrated communities have the ability to resolve registration requests stuck in "TGO Provisioning" status.

After a registration request is submitted, one of the following occurs:

- If the request can be set up, the registration is processed normally.
- If the request cannot be processed, the following occurs:
 - a The user receives an error message with additional information.
 - b Support receives a copy of the issue and begins an investigation.

- c Support notifies the user when the request can be successfully re-submitted a final time.
- d Support instructs the user to click **Re-Submit Request** (the button displays 15 hours after submitting a registration request).



An icon displays for requests that have already been re-submitted.

ID	Company Name	Days Open	Days Assigned	Approval Stage	Approval Group	Owner
2392	As_Comp3Feb1	38	38	Tgo Provisioning		
605	brkContact091114	183	183	Tgo Provisioning		
1137	bulk request test 2312 dec	80	80	Tgo Provisioning		
1138	bulk request test 24 dec	79	79	Tgo Provisioning		
2499	Cmp69169110	83	11	Tgo Provisioning		
2500	Cmp69169111	83	11	Tgo Provisioning		
2501	Cmp69169112	83	11	Tgo Provisioning		
2229	Cmp7797913		44	Tgo Provisioning		

Using the Registration Dashboard to Track Requests

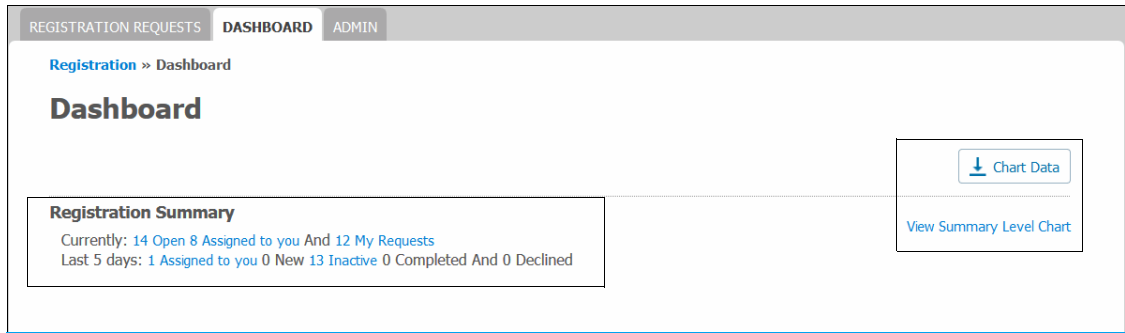
The Registration Dashboard lets you view the number of open requests, requests assigned to you, and other statistics. It also provides views of registration activity over a period of days and months, which helps track trends and issues.

For example, you might note the average number of days to register a company increases by 30 percent during the month of July because people are out on vacation.

The Dashboard consists of two parts:

- Registration Summary - the links take you to the Registration Requests tab so you can, for example, view a list of all requests with an Open status or a list of

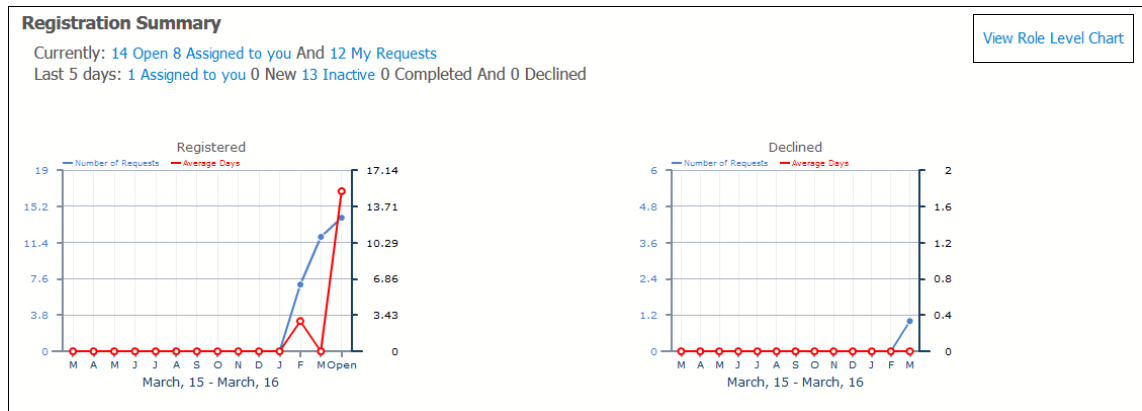
requests you created. Click a link to open a request and act on it as described in “Finding Registration Requests” on page 499.



- Chart Data - the links allow you to view and download registration data.
 - Download Chart Data lets you view chart data in .xls format. See “View and Download Chart Data” on page 525.
 - View Summary Level Chart and its counterpart View Role Level Chart are accessed by toggling the two links; you can view request data in chart format by status or registration role.

Registration Summary Level Chart

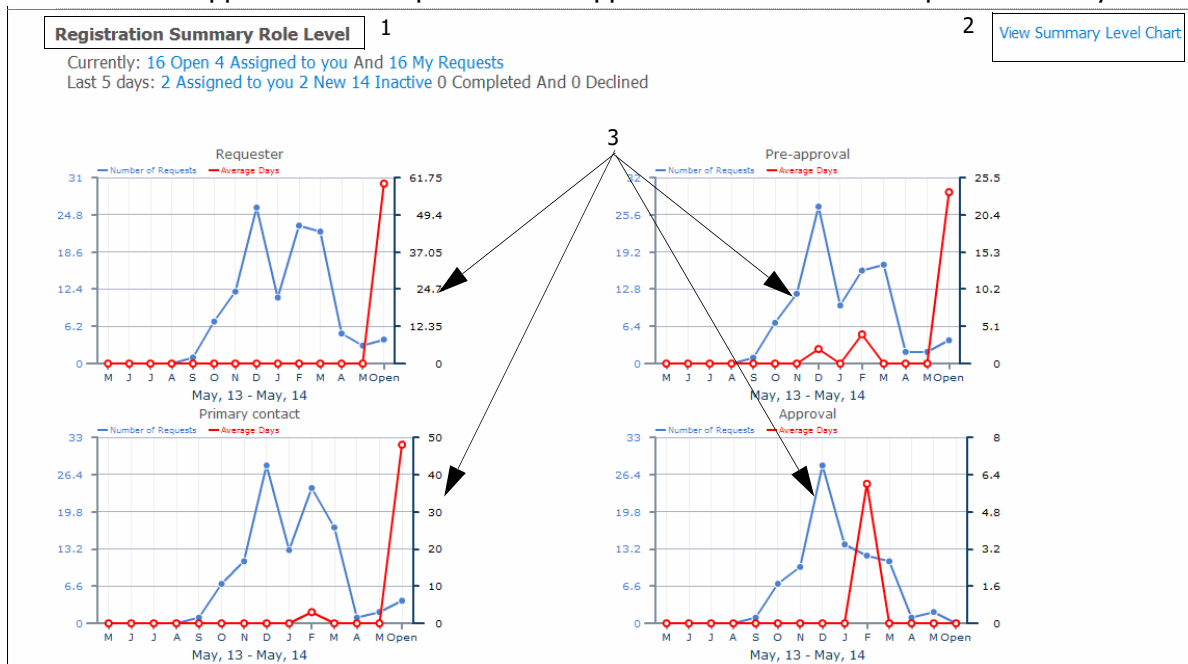
The Registration Summary Level chart displays request data for the past five days. It includes charts for requests with Registered and Declined statuses.



Registration Summary Role Level Chart

The Registration Summary Role Level chart displays request data for the past five days by registration role. The chart can help you analyze request activity by groups of people in your registration process.

For example, you might want to see how request processing is trending by the Pre-Approval role compared to the Approval role over the first quarter of the year.



The key parts of the page:

Key	Description
1	Registration Summary Role Level data
2	Link to View Summary Level Chart view
3	Registration roles

The axes on the chart are defined as follows:

- Horizontal axis represents Average Number of Days Open (by month).
- Vertical axis represents Number of Requests.

Note: If you hover your mouse over a point in the chart, the statistics for that period display.

View and Download Chart Data

Ageing reports are based on chart data by status and role. They can be run in .xls format. The reports let you analyze requests over a period of time. For example, you can see the number of requests processed over a given month to provide statistics on the efficiency and frequency of your supplier registration process.

Use this procedure to view and download reports in .xls format.

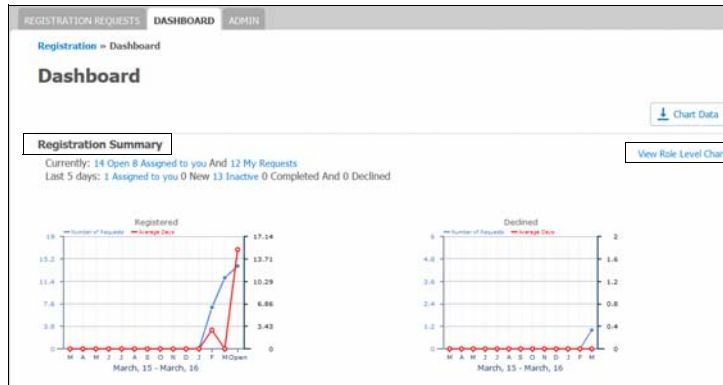
To view and download chart data in Excel format

- 1 Click **Applications** > **Registration** > **Dashboard** tab.

The Dashboard page opens.



2 Click **View Summary Level Chart** to display registration summary data.



3 If you want to download:

- Registration summary level data, click **Chart Data**.
- Registration summary role level data, click **View Role Level Chart**, then click **Chart Data**.

Note: Click the **View Summary Level Chart** and **View Role Level Chart** links to switch between the two charts and view the data by registration status or by role.

4 Do one of the following:

- Click **Open with**, and select the program you want to use to open and display the report (for example, Microsoft Excel).
- Click **Save File**, and navigate to a location on your computer where you want to save the file.

5 Click **OK**.

If you selected open with Microsoft Excel, the Excel file opens and displays the report.

Working with Registration Custom Exports

Create custom exports to use for reporting, analysis, or problem resolution.

Registration custom exports let you define the general criteria and custom fields to include in the export. You can also specify additional export options for the Excel file.

The custom export contains every detail about requests in Active Community registration in your community. Exports are commonly used for keeping a printed file copy of request information.

Note: If you have permission to view the data in a masked company custom field, the data displays. If you do not have permission to view the data, 10 asterisks display instead.

Important:

- Basic request information is on one tab of the Excel file. The information includes current status, names of contacts in the Pre-Approval and Approval roles, and time/dates of submission and modification.
- Custom field information displays in other tabs at the bottom of the file. The tabs correspond to each tab in a registration request. If the Add Summary Export check box is selected when configuring the export, summary data displays on a separate tab (see ["Formatting a Registration Custom Export" on page 530](#)).

Request ID	Company Name	Request Type	Status	Action	Assigned Role	Created Date	Modified
2	Kramerica	Company Registration	Submitted	Submit	approver	08/06/2009 17:38:27	19/06/2009
3	Vandolay Industries	Company Registration	Requested	Request	pre approver	08/06/2009 21:15:40	08/06/2009
4	Gecko Co	Company Registration	Created	Re-Open	requester	09/06/2009 13:42:05	30/06/2009
5	18 Wayne Enterprises	Company Registration	Requested	Request	pre approver	10/06/2009 13:37:20	10/06/2009
6	19 Addingham	Company Registration	Sent to Company	Approve	primary contact	10/06/2009 21:53:32	10/06/2009
7	20 Kamco	Company Registration	Sent to Company	Approve	primary contact	11/06/2009 04:24:46	11/06/2009
8	22 United Car Rental	Company Registration	Requested	Request	pre approver	11/06/2009 09:09:51	11/06/2009
9	23 Avis Rent a Car	Company Registration	Created	Return	requester	11/06/2009 09:10:44	22/06/2009
10	24 HouseTex	Company Registration	Sent to Company	Approve	primary contact	11/06/2009 09:11:35	11/06/2009
11	40 Addington	Company Registration	Created	Return	requester	17/06/2009 10:23:41	22/06/2009
12	42 Arabian Perfumes	Company Registration	Sent to Company	Approve	primary contact	18/06/2009 07:37:07	18/06/2009
13	45 Redding Institutional Company	Company Registration	Sent to Company	Approve	primary contact	30/06/2009 15:09:16	01/07/2009
14	46 Bradleigh Inc.	Company Registration	Sent to Company	Approve	primary contact	30/06/2009 19:05:56	30/06/2009

If you do not have registration permissions to view information in a request (such as the request tabs for custom fields), the tab is not included in the export file (see ["Registration Roles and Contacts" on page 82](#)).

For more information, see ["Registration Setup" on page 423](#), especially the section, ["Defining Custom Field Forms in Registration Requests" on page 435](#)

Note: If you have permission to view the data in a masked company custom field, the data displays. If you do not have permission to view the data, 10 asterisks display instead.

Topics include:

- ["Creating General Settings for a Registration Custom Export" on page 528](#)
- ["Formatting a Registration Custom Export" on page 530](#)
- ["Running a Registration Custom Export" on page 531](#)
- ["Editing a Registration Custom Export" on page 532](#)
- ["Deleting a Registration Custom Export" on page 533](#)

Creating General Settings for a Registration Custom Export

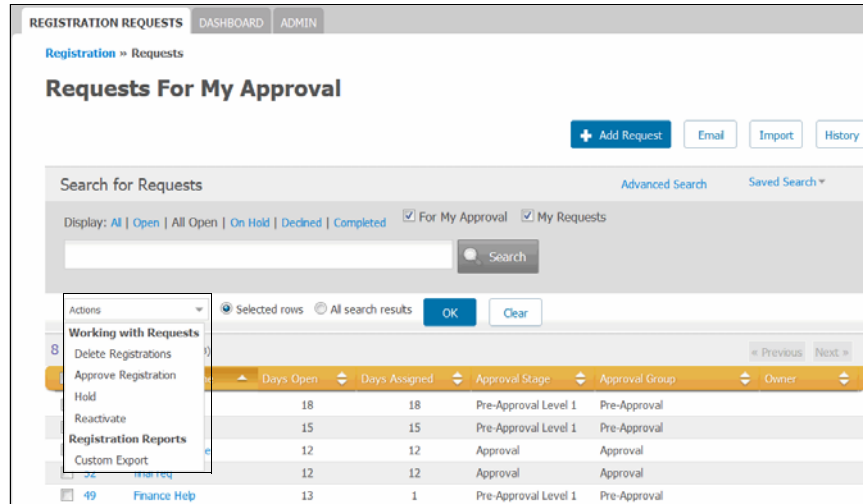
Use this procedure to define the data you want to include in an Excel (.xls) file when exporting registration data.

Note: To define how you want the data look in the Excel file, go to [“Formatting a Registration Custom Export”](#) on page 530 after completing this procedure.

To create the general settings for a registration custom export

- 1 Click **Applications > Registration**.

The Requests For My Approval page opens.

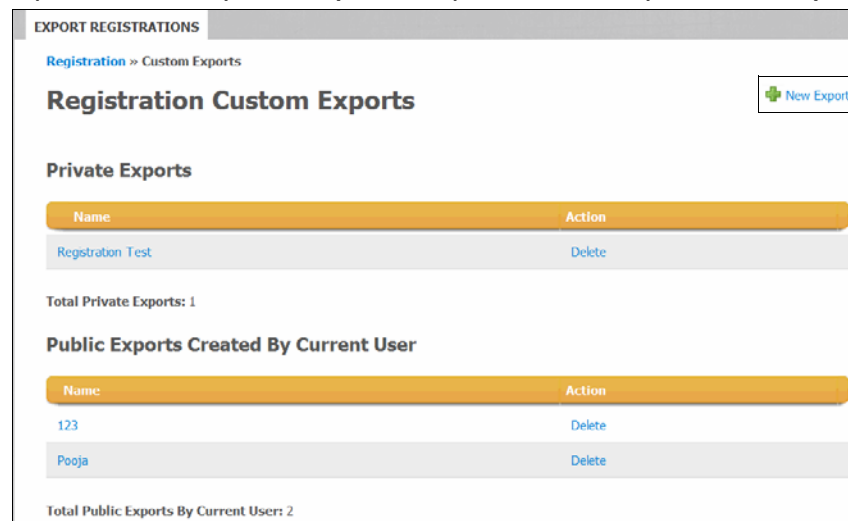


- 2 From the Actions drop-down list, select **Custom Export**.

- 3 Select the registration requests you want to include in the export.

- To include all requests, select **All Search Results**, then click **OK**.
- To include specific requests, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Registration Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Other Users).



- 4 To define the general settings for a new custom export, click **New Export**. The Registration Custom Export page opens.

- 5 Complete the following:
- In **Name**, type the name of the custom export.
 - In **Public?**, if you want the export to be:
 - Private, do not select the **Public?** check box.
 - Available to other users, select the **Public?** check box.
 - Select the **Export Identifiers** check box if you want to export the identifiers, in addition to the labels, for the custom fields. For example:

Multiple Choice (Label)	Multiple Choice
Hammer	H0023

Note: Exporting the identifiers provides the information that is needed to import the file back into Active Community. Applies only to Multiple Choice, Drop List, and Radio Button List custom fields. Only available to users with appropriate permissions.

- Select the **Export Additional Comments** check box if you want to export the "Additional Comments" associated with the custom field values. The export of additional comments for a custom field is only available if the "Add Comment Field" has been enabled for that field.
- 6 In the **Select custom fields for groups to include in export** check boxes, select the custom fields or groups for which you want to include data in the export. As you select a check box, additional fields display so you can include or exclude them from the custom export.
- 7 Click **Save**.
The Registration Custom Export page refreshes and lists the new export.
- 8 Go to ["Formatting a Registration Custom Export."](#)

Formatting a Registration Custom Export

Use this procedure to define settings that control how exported registration data looks in the Excel file.

Important: If you want registration information to be summarized on a separate tab on the Excel spreadsheet, be sure to select the Add Summary Export check box as described in this procedure.

To configure the format for a registration custom export

- 1 After "Creating General Settings for a Registration Custom Export" on page 528, on the Registration Custom Exports page, click the name of a custom export.
- 2 To define Excel format settings for the export, click **Configure Export**. The Configure Export page opens. The top part of the page is shown.

- 3 Under Export Options, select one of the radio buttons to indicate how you want to export multiple choice fields. You can export them as:
 - Individual Columns
 - Comma separated values in one cell
- 4 Under Summarize Fields (the bottom part of the page is shown), select the **Add Summary Export** check box if you want registration information to be summarized on a separate tab on the Excel spreadsheet.

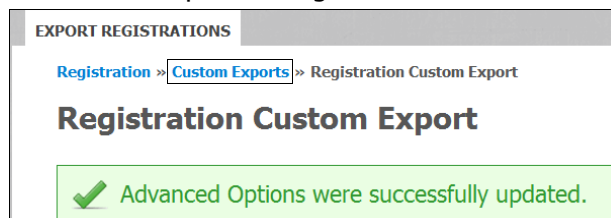
Additional fields display.

- 5 Do any of the following:

- In the summary, each field is displayed as a percentage. Optionally, choose the **Show Count** and **Show Total** check boxes if you want to include the count and/or total for the fields.
- To select the fields by which you want to group the data, make selections from the **Group by Field** drop-down list. Click the **+** icon to add up to five groups.
- To select how you want the information to be summarized, make a selection from the **Summarize On** drop-down list. If you select:
 - Do Not Summarize—The registration summary information is not summarized.
 - Custom Fields (for example, # of Employees)—Add additional parameters to the export. Use the Type drop-down list and **+** icon to indicate additional parameters.

6 Click **Save**.

The custom export settings are saved. You have completed the procedure.



7 To run the export, click **Run**.

8 When the Run Custom Export page opens, click **Run** again.

Note: Default file name: *Custom_Export_Name_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

9 Open or save the file to your computer.

Running a Registration Custom Export

You can run a custom export you created previously (see [“Creating General Settings for a Registration Custom Export”](#) on page 528 and [“Formatting a Registration Custom Export”](#) on page 530).

Note: If you have permission to view the data in a masked company custom field, the data displays. If you do not have permission to view the data, 10 asterisks display instead.

To run a registration custom export

1 Click **Applications > Registration**.

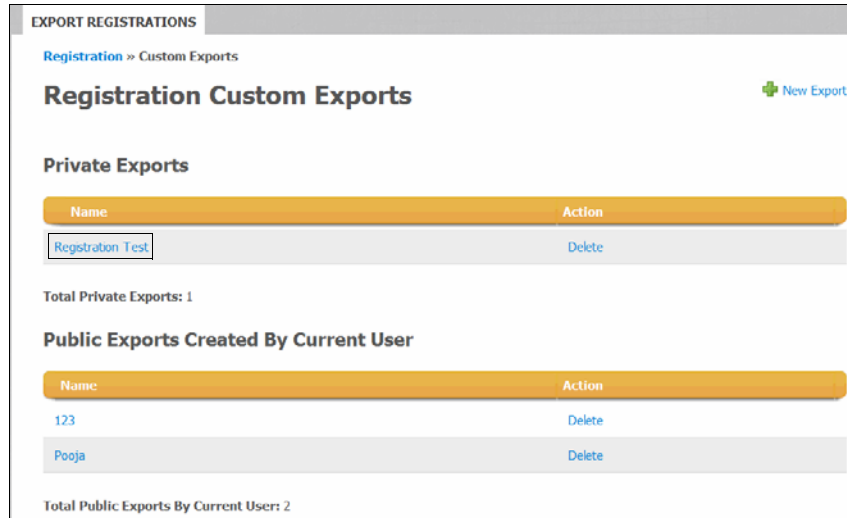
The Requests For My Approval page opens.

2 From the Actions drop-down list, click **Custom Export**.

3 Select the registration requests you want to include in the export.

- To include all requests, select **All Search Results**, then click **OK**.
- To include specific requests, select the check boxes for the contacts you want to include in the export, select **Selected Rows**, and click **OK**.

The Registration Custom Exports list page opens.



- 4 Click the name of the registration custom export you want to run. For example, click **Registration Test**.

The page that opens shows the saved export settings for the export.

- 5 Click **Run**.

The Run Summary dialog box opens.

- 6 Change the filename, if needed, and then click **Run**.

- 7 Type a file name, and click **Run**.

Note: Default file name: *Custom_Export_Name_MM_DD_YYYY* where MM_DD_YYYY represents the month, day, and year the export is run.

- 8 Open or save the file to your computer.

Note: Large exports (processing times of more than 30-40 seconds) run in the background, and the generated export file is sent to you as a download link in an email. The link is available for 7 days. Smaller exports are downloaded instantly.

Editing a Registration Custom Export

You can change the settings in any custom export that you created.

Note: You cannot edit a custom export created by other users.

To edit a registration custom export

- 1 Click **Applications > Registration**.

The Requests For My Approval page opens.

- 2 From the Actions drop-down list, click **Custom Export**.

- 3 Select **All Search Results**, then click **OK**.

The Registration Custom Exports list page opens. It lists saved exports you created (Private Exports and Public Exports Created by Current User) and exports created by others (Public Exports Created by Others).

Name	Action
Registration Test	Delete

Total Private Exports: 1

Name	Action
123	Delete
Pooja	Delete

Total Public Exports By Current User: 2

- 4 Click the name of the custom export you want to edit.
Note: You cannot edit a custom export created by other users.
- 5 Modify the export as described in ["Creating General Settings for a Registration Custom Export"](#) on page 528.
- 6 Click **Save** to save your changes.

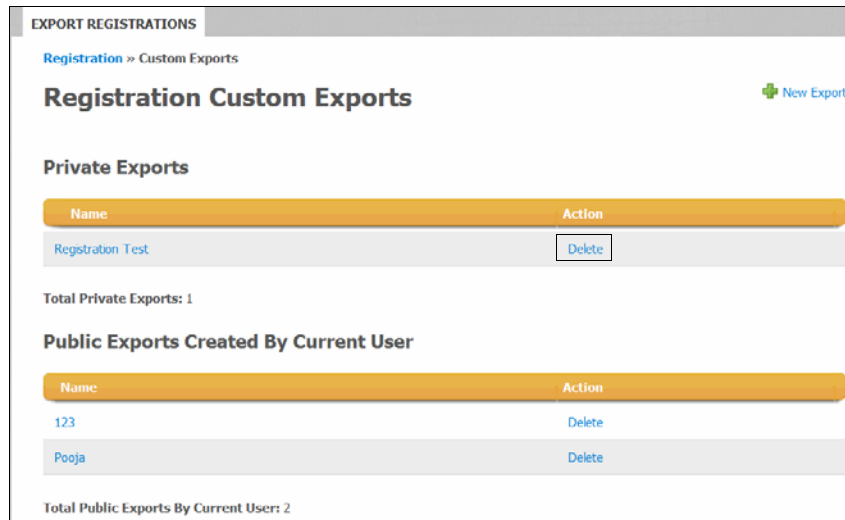
Deleting a Registration Custom Export

Users who create a custom export, as well as Community Administrators, can delete the custom export.

To delete a company custom export

- 1 Click **Applications > Registration**.
The Requests For My Approval page opens.
- 2 From the Actions drop-down list, click **Custom Export**.
- 3 Select **All Search Results**, then click **OK**.

The Registration Custom Exports list page opens.



- 4 Click **Delete** for the export you want to delete.
 A message asks you to confirm the deletion.
- 5 Click **OK**.
 The export is deleted.

Downloading a Registration Request History Report

The Registration Request History Report lists all auditable changes to registration requests in a hub community. The report is used for internal auditing of request information.

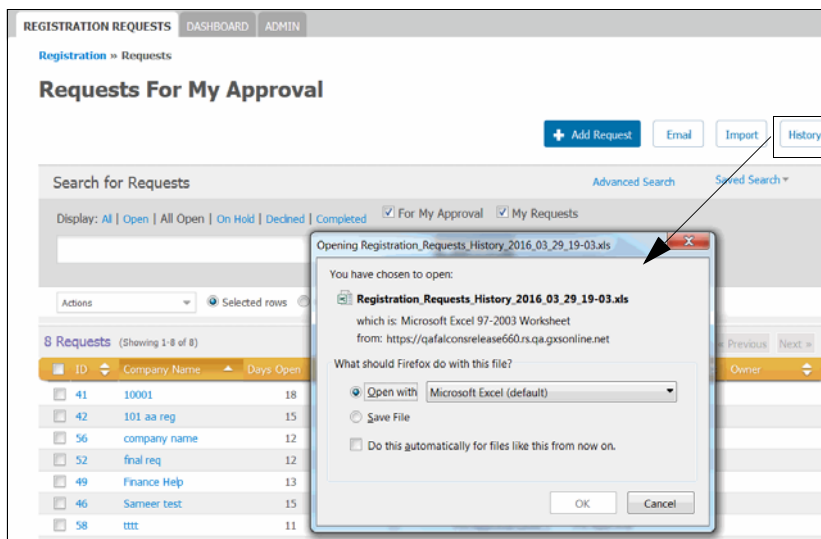
In the report, request changes are reflected in transaction rows. Each row names the contact who made the change, the time and date of the change, and the request information at the time of the change. Reasons for putting requests on hold and/or reactivating them are also available in the History Report.

Note: If you have permission to view the data in a masked company custom field, the data displays. If you do not have permission to view the data, 10 asterisks display instead.

To run and download a request history report

- 1 Click **Applications > Registration > Registration Requests** tab.
 The Requests For My Approval page opens.
- 2 Click **History**.

The Opening Registration Requests History dialog box opens.



3 Do one of the following:

- Click **Open with**, and select the program you want to use to open and display the report (for example, Microsoft Excel).
- Click **Save File**, and navigate to a location on your computer where you want to save the file.

4 Click **OK**.

If you selected open with Microsoft Excel, the Excel file opens and displays the report.

A	B	C	D	E	F	G	H
Request ID	Transaction ID	Company Name	Request Type	Status	Action	Stage	Approved By Grot Owner
278	705	P6 Test	Company Registrat	Requested	Request	Pre-Approval Level 1	
278	751	P6 Test	Company Registrat	Sent to Company	Update	Primary Contact	
278	752	P6 Test	Company Registrat	Sent to Company	Update	Primary Contact	
278	753	P6 Test	Company Registrat	Sent to Company	Update	Primary Contact	
278	754	P6 Test	Company Registrat	Sent to Company	Update	Primary Contact	
278	706	P6 Test	Company Registrat	Sent to Company	Approve	Primary Contact	Pre Approver
278	763	P6 Test	Company Registrat	Requested	Recall	Pre-Approval Level 1	
286	742	P15	Company Registrat	Requested	Request	Pre-Approval Level 1	
286	743	P15	Company Registrat	Requested	Exec Approve	Pre-Approval Level 1	Pre Approver
286	744	P15	Company Registrat	Sent to Company	Approve	Primary Contact	Pre Approver
286	745	P15	Company Registrat	Requested	Recall	Pre-Approval Level 1	
286	758	P15	Company Registrat	Requested	Exec Approve	Pre-Approval Level 1	Pre Approver
288	755	LB CO	Company Registrat	Requested	Request	Pre-Approval Level 1	

Viewing and Exporting an EIN (Tax ID) Usage Report

Each time you attempt to verify a Tax ID (EIN), Active Community creates a log with the details of the verification attempts. The data in these logs, such as the Company name, the time and date of the verification, and whether or not the verification was successful comprises the EIN Usage Report.

Note: Only the Community Administrator has access to this report.

There are two ways to obtain the usage report:

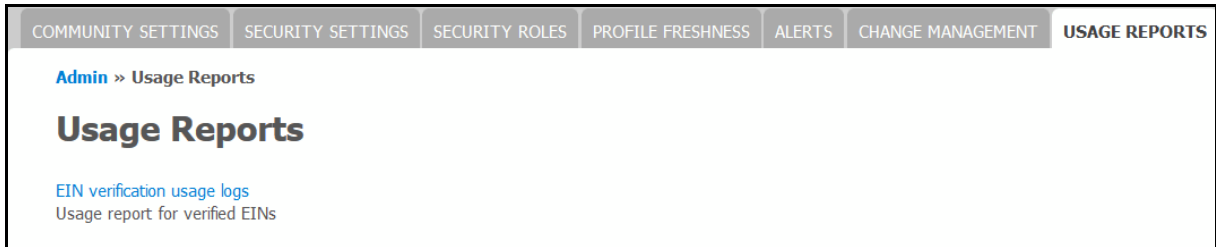
- View the EIN usage data for a 6 month period. If a verification was successful, verified data is available in a pop-up window.

- Export the EIN usage data for a 12 month period. In the exported report, verification requests are reflected in transaction rows. Each row displays the person who requested the verification, the Company name, the EIN, the status of the verification (Fail or Success), and the time and date the EIN was verified.

To view or export an EIN Usage Report

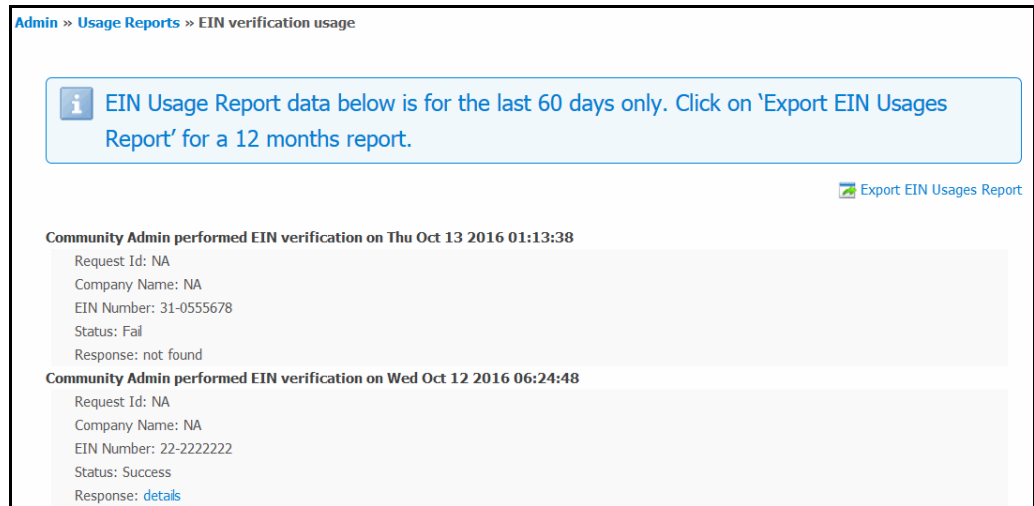
- 1** Click **Applications > Admin > Usages Reports** tab.

The Usage Reports window opens.



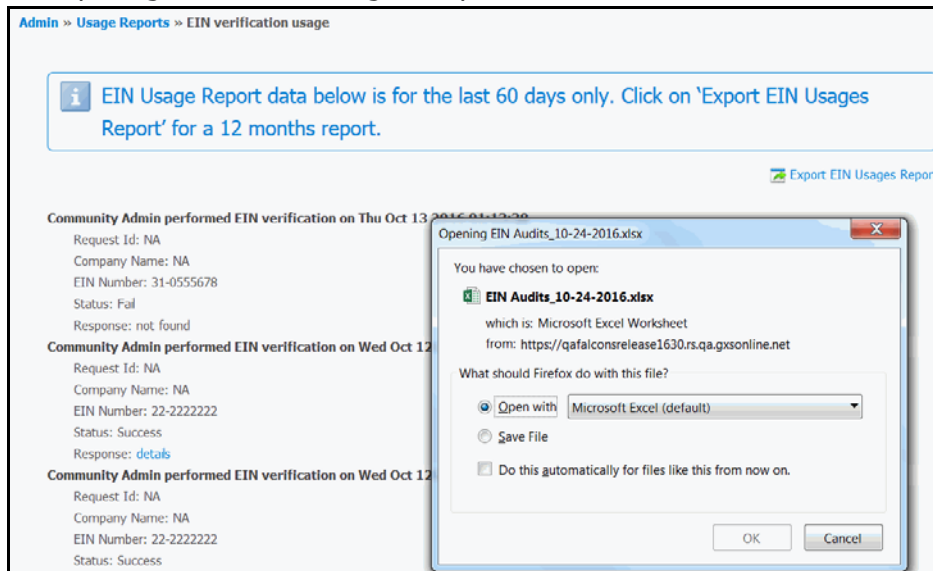
- 2** Click **EIN verification usage logs**.

The EIN Usage Report data for the last 60 days displays.



- 3** To export an EIN Usage Report with 12 months data, click **Export EIN Usages Report**.

The Opening EIN Audits dialog box opens.



4 Do one of the following:

- Click **Open with**, and select the program you want to use to open and display the report (for example, Microsoft Excel).
- Click **Save File**, and navigate to a location on your computer where you want to save the file.

5 Click **OK**.

If you selected open with Microsoft Excel, the Excel file opens and displays the report.

	A	B	C	D	E	F
1	Person	Request Id	Company Name	EIN Number	Status	Verified on
2	Community Admin	NA	NA	31-0555678	Fail	2016-10-13 01:13:38 UTC
3	Community Admin	NA	NA	22-2222222	Success	2016-10-12 06:24:48 UTC
4	Community Admin	NA	NA	22-2222222	Success	2016-10-12 04:14:07 UTC
5	Community Admin	NA	NA	44-4444444	Success	2016-10-12 04:03:51 UTC
6	Community Admin	NA	NA	22-2222222	Success	2016-10-07 09:42:05 UTC
7	Community Admin	NA	NA	22-2222222	Success	2016-10-07 08:51:11 UTC
8	Community Admin		213 ESCOE BLISS INC	99-9999999	Success	2016-10-07 07:40:33 UTC
9	Community Admin		197 PPPSERT	22-2222222	Success	2016-10-07 07:22:05 UTC
10	Community Admin		221 CCG	34-3434343	Fail	2016-10-07 07:14:07 UTC
11	Community Admin		221 CCG	99-9999999	Success	2016-10-07 07:11:41 UTC

Active Community AIC Provisioning is a process solution designed to help hubs implement application services such as Active Invoices with Compliance (AIC).

Note: AIC Provisioning is available for TGO integrated communities only, and must be enabled for your community. Contact Support for assistance.

Topics include:

- [“Legal Profile Provisioning for AIC - Overview” on page 539](#)
 - [“Configuring the Hub for AIC” on page 540](#)
 - [“Trading Partner \(Spoke\) Requirements” on page 540](#)
- [“AIC Provisioning - Legal Profile Forms” on page 540](#)
 - [“Creating a Legal Profile Form with AIC Custom Field Groups” on page 541](#)
 - [“Adding AIC Custom Fields to a Legal Profile Form” on page 543](#)
- [“AIC Provisioning - Working with AIC Custom Fields” on page 547](#)
- [“AIC Provisioning - Working with Legal Profile Forms” on page 556](#)
- [“AIC Subscriptions - Legal Profiles for Trading Partners” on page 559](#)
 - [“Submitting a Legal Profile” on page 560](#)
 - [“Editing a Legal Profile” on page 561](#)
 - [“Viewing a Legal Profile” on page 563](#)
 - [“Deleting a Legal Profile” on page 563](#)

Legal Profile Provisioning for AIC - Overview

Active Invoices with Compliance (AIC) is a compliance service that takes an invoice sent by a trading partner (TP) and ensures that the invoice meets certain criteria. The invoice is officially signed, and is logged by a country for tax purposes. A trading partner must create and submit a legal profile to AIC so it can use the AIC service.

Topic include:

- [“Configuring the Hub for AIC” on page 540](#)
- [“Trading Partner \(Spoke\) Requirements” on page 540](#)

Configuring the Hub for AIC

From a hub or Community Administrator perspective, multiple components must be set up to implement the AIC service for TP use. They include:

- Using a TGO invitation code specific to AIC provisioning (see [“Managing TGO Invitation Codes” on page 434](#))
- Creating legal profile forms for relevant countries and/or business units (see [“Creating a Legal Profile Form with AIC Custom Field Groups” on page 541](#))
- Publishing the legal profile form (see [“Publishing a Legal Profile Form” on page 558](#))

For AIC Provisioning, OpenText Professional Services collaborates with an OpenText AIC integrator to create a legal profile form (Community Administrator permissions are required). The form consists of a name, a description, and the required AIC custom fields for a specific country and/or business units. The custom fields are those that can be accepted and used by the AIC API. After a legal profile form is created and published, the form can be used by a TP to create their legal profile as part of their AIC service (see [“Creating a Legal Profile Form with AIC Custom Field Groups” on page 541](#) and [“Publishing a Legal Profile Form” on page 558](#)).

Trading Partner (Spoke) Requirements

From a Trading Partner or spoke perspective, TPs must meet two requirements before using the Active Invoice with Compliance (AIC) service. Trading partners must complete the registration process, and they must create and submit a legal profile as part of their AIC subscription.

Note: If the hub designed its registration process to collect legal profile information at the same time it collects company information, a trading partner does not need to create a legal profile manually.

For manual creation, the trading partner creates a legal profile by selecting the appropriate legal profile form for the country of interest, completes the required AIC custom fields, and submits the form to AIC (see [“Submitting a Legal Profile” on page 560](#)). The legal profile becomes a permanent part of the TP’s record. The TP can now use their AIC subscription.

AIC Provisioning - Legal Profile Forms

The AIC Provisioning process includes creating a legal profile form for a TP to use as the basis for a legal profile.

The form consists of the following components:

- Name and description of the form and whether it is based on another form or is being created from scratch.
- AIC custom fields groups (for example, Legal Entity, Contact, or Delivery) and custom fields (for example, the Legal Entity custom field group might contain Unique ID, Name, and State custom fields).

Topics include:

- “Creating a Legal Profile Form with AIC Custom Field Groups” on page 541
- “Adding AIC Custom Fields to a Legal Profile Form” on page 543

Creating a Legal Profile Form with AIC Custom Field Groups

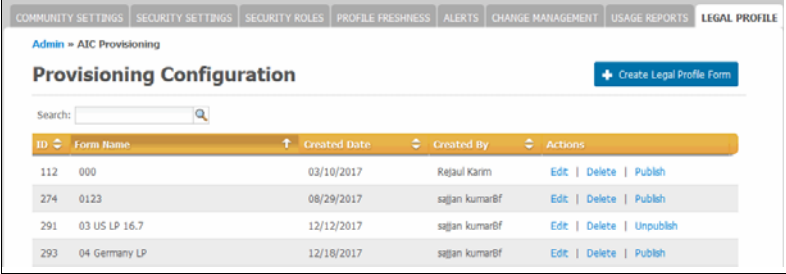
Use this procedure to create a legal profile form and add AIC custom field groups to it.

Security role: Community Administrator

To create a legal profile form and add AIC custom field groups

- 1 Click **Admin > Legal Profile** tab.

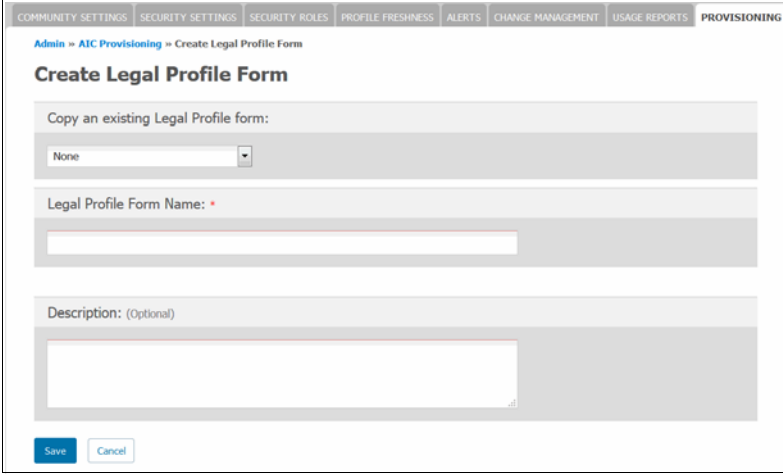
The Provisioning Configuration page opens.



ID	Form Name	Created Date	Created By	Actions
112	000	03/10/2017	Rajaul Karim	Edit Delete Publish
274	0123	08/29/2017	sajan kumarBf	Edit Delete Publish
291	03 US LP 16.7	12/12/2017	sajan kumarBf	Edit Delete Unpublish
293	04 Germany LP	12/18/2017	sajan kumarBf	Edit Delete Publish

- 2 Click **Create Legal Profile Form**.

The Create Legal Profile Form page opens.

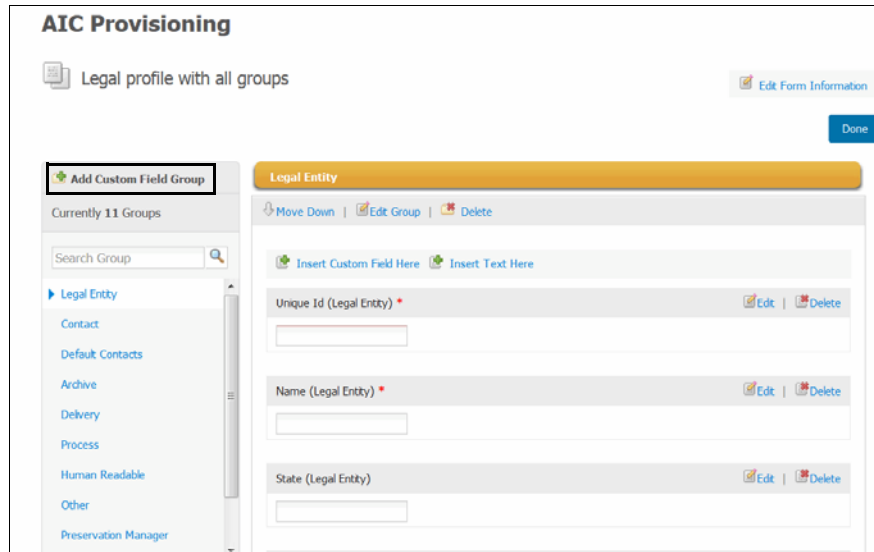


- 3 Specify the following:

- Choose whether to create a form from scratch or use an existing legal profile form as the basis for a new form. Do one of the following:
 - To create a new form from scratch, leave the default **None** in the drop-down list.
 - To use an existing legal profile form as the basis for a new form, select the form you want to copy from the drop-down list.
- Legal Profile Form Name—Required. Type the name by which you want to identify the legal profile form.
- Description—Type a description of the form.

4 Click Save.

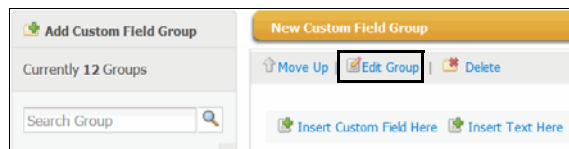
The AIC Provisioning page opens.



Any AIC custom field groups that have been defined display as tabs. When a tab is selected, AIC custom fields that have been defined for the group display.

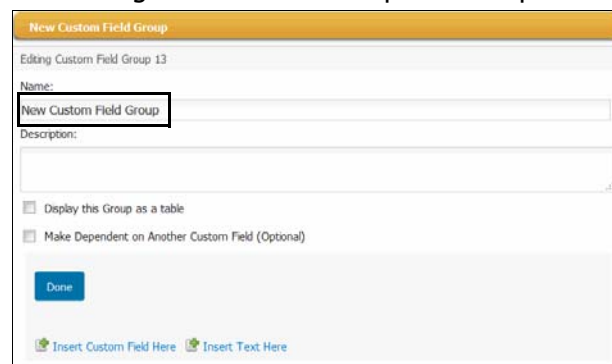
5 Click Add Custom Field Group.

The New Custom Field Group section opens. You are replacing the “New Custom Field Group” name in step 7.



6 Click Edit Group.

The Editing Custom Field Group section opens.



7 In Name, type over “New Custom Field Group” and give the group a name, such as “Legal Entity” or “Delivery.”

8 In Description, type a general description of the custom group, such as the nature of the custom fields it contains.

- 9 Select the appropriate check boxes at the bottom of the page to perform the actions described in the following table:

If you want custom fields in the group to...	Do this:
Display as columns in a table	<ul style="list-style-type: none"> ■ Select the "Display this Group as a table" check box (see "Creating AIC Custom Fields in Data Tables" on page 550).
Be conditional based on the answer to another custom field	<ul style="list-style-type: none"> ■ Select the "Make Dependent on Another Custom Field (Optional)" check box (see "Creating Dependent AIC Custom Fields" on page 548).

- 10 Click **Done**.

You have created an AIC custom field group. At the top of the page, the name of the group refreshes with the name you typed in step 7.

- 11 Repeat steps 5-10 to add more AIC custom field groups.

- 12 To add AIC custom fields to the AIC custom field groups, go to step 4 in ["Adding AIC Custom Fields to a Legal Profile Form" on page 543](#).

Adding AIC Custom Fields to a Legal Profile Form

Security role: Community Administrator

Use this procedure to add AIC custom fields to an AIC custom field group. Before you begin, be sure the AIC custom field group to which you want to add the custom fields has been created (see step 5 ["Creating a Legal Profile Form with AIC Custom Field Groups" on page 541](#)).

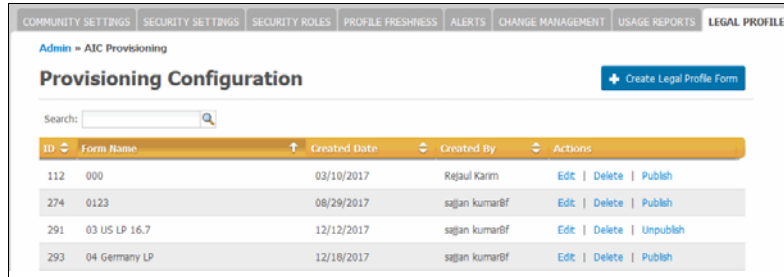
As part of this procedure, you are:

- Selecting the options you want to apply to the custom field, and
- Entering instructions to help users understand what to enter in the custom field.

To add AIC custom fields to an AIC custom field group

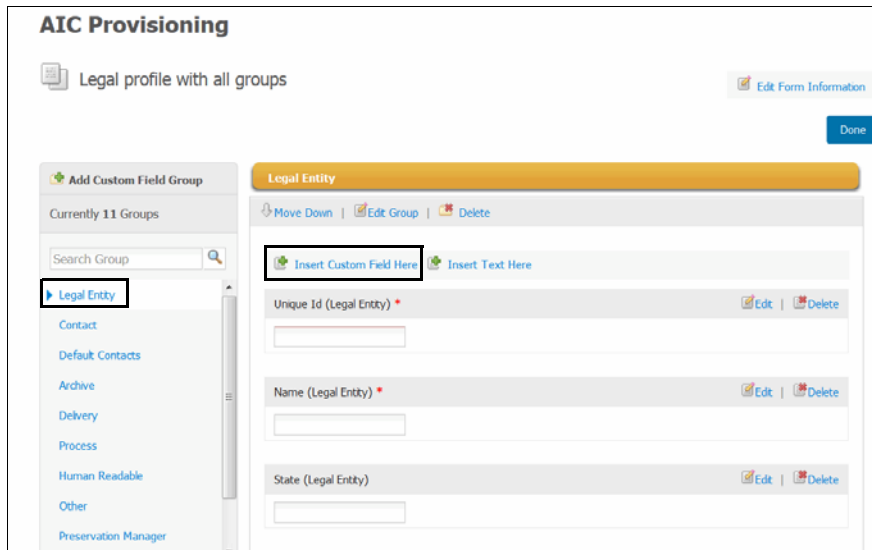
- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



- 2 Search for the legal profile form to which you want to add AIC custom fields.
- 3 Click **Edit** for the legal profile form.

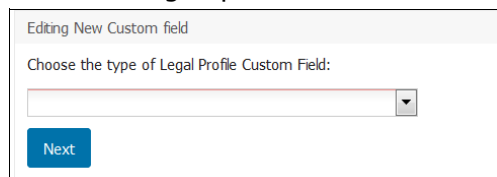
The AIC Provisioning page opens.



Any AIC custom field groups that have been defined display as tabs. When a tab is selected, AIC custom fields that have been defined for the group display.

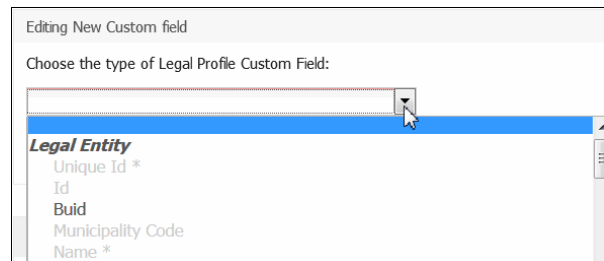
- 4 Select the tab for the AIC custom field group to which you want to add AIC custom fields.
- 5 Click **Insert Custom Field Here**.

The Editing New Custom Field section opens at the selected location in the AIC custom field group.



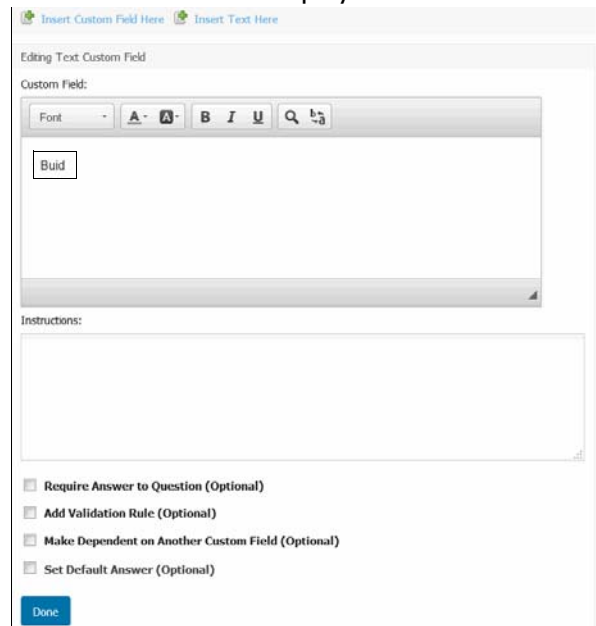
- 6 From the drop-down list, select the AIC custom field you want to add.

Note: Each AIC custom field can be added only once. Once the field is used, it is unavailable.



- 7 Click **Next**.

The AIC custom field displays in the text box.



Note: If needed, use the formatting icons to emphasize any text in the custom field, such as making a word bold or changing the font.

- 8 In Instructions, type the help text for the custom field. The text displays when contacts click the help icon for the custom field.

9 Select options that you want to apply to the AIC custom field.

Important: Based on your selection, additional fields might display. The additional fields let you refine the custom field further.

Option	Description
Require Answer to Custom Field (Optional)	<p>Make the custom field mandatory.</p> <p>Note: Selecting this option displays another option, "Mandatory based on." This option is not applicable at this time.</p>
Add Validation Rule (Optional)	<p>Specify a condition such as:</p> <ul style="list-style-type: none"> ■ Only Allow Numeric Values ■ Min Length" and "Max Length <p>If the same number is entered in both the Min Length and Max Length fields, the Append Leading Zeroes field displays. Select this if you want zeroes to be appended in front of the entered data.</p> <p>For example, if the value in the min/max length is 8 and a custom field is answered as 123456, Active Community adds two zeroes in front of the answer so the total number of characters equals the min/max length (in this example, 00123456).</p> <p>The Append Leading Zeroes check box can be used with or without the Only Allow Numeric Values check box; that is, you can append zeroes to both numeric and alphanumeric values.</p> <div data-bbox="794 989 1374 1226" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Add Validation Rule (Optional)</p> <p>Text must be:</p> <p>Min Length <input type="text" value="8"/> Max Length <input type="text" value="8"/></p> <p><input checked="" type="checkbox"/> Only Allow Numeric Values</p> <p><input checked="" type="checkbox"/> Append Leading Zeroes</p> </div>
Make Dependent on Another Custom Field (Optional)	<p>Make an AIC custom field conditional based on the answer to another AIC custom field. The other AIC custom field must have already been defined (see "Creating Dependent AIC Custom Fields" on page 548).</p>
Set Default Answer (Optional)	<p>Type the default answer.</p> <p>Selecting the check box displays an additional field that allows you to make the AIC custom field read-only.</p> <div data-bbox="738 1461 1206 1564" style="border: 1px solid black; padding: 5px;"> <p><input checked="" type="checkbox"/> Set Default Answer (Optional)</p> <p><input type="text" value="Enter default answer here"/></p> <p><input type="checkbox"/> Make Field Read-Only (Optional)</p> </div>

10 Click **Done**.

You have added an AIC custom field to an AIC custom field group.

Note: If an AIC custom field is required, an asterisk displays for the field. If an AIC custom field is dependent on another AIC custom field or is mandatory based on another AIC custom field, the details are displayed.

AIC Provisioning - Working with AIC Custom Fields

These topics describe how to tailor AIC custom field groups and AIC custom fields to meet your needs.

Topics include:

- "Finding AIC Custom Field Groups" on page 547
- "Creating Dependent AIC Custom Fields" on page 548
- "Creating AIC Custom Fields in Data Tables" on page 550
- "Re-Sequencing AIC Custom Field Group Tabs" on page 552
- "Adding Instruction Text" on page 553
- "Creating Help Icon Text" on page 553
- "Deleting an AIC Custom Field Group" on page 554
- "Deleting an AIC Custom Field" on page 555

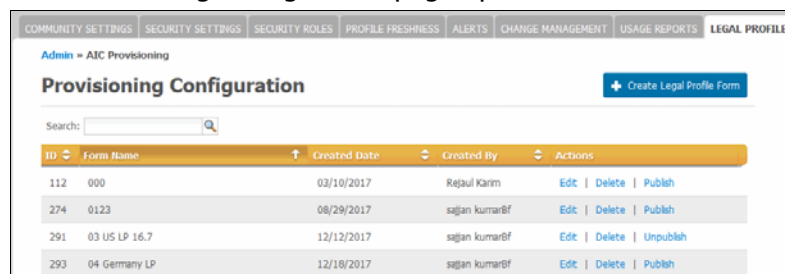
Finding AIC Custom Field Groups

Use this procedure to search for and find AIC custom field groups so you can work with the AIC custom fields they contain.

To search for AIC custom field groups

- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.

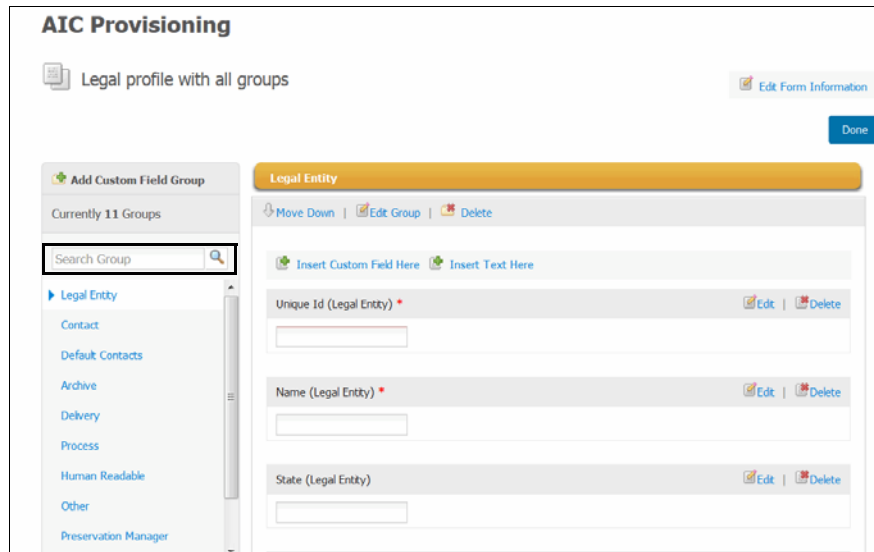


The screenshot shows the 'Provisioning Configuration' page in the Admin interface. It features a search bar and a table with columns for ID, Form Name, Created Date, Created By, and Actions. The table contains four rows of data.

ID	Form Name	Created Date	Created By	Actions
112	000	03/10/2017	Rajaul Karim	Edit Delete Publish
274	0123	08/29/2017	sajan kumarBf	Edit Delete Publish
291	03 US LP 16.7	12/12/2017	sajan kumarBf	Edit Delete Unpublish
293	04 Germany LP	12/18/2017	sajan kumarBf	Edit Delete Publish

- 2 Search for the legal profile form whose AIC custom field groups you want to work with.
- 3 Click **Edit** for the legal profile form.

The AIC Provisioning page opens.



Any AIC custom field groups that have been defined display as tabs.

- 4 In Search Group, start typing the name of the group you want to find. The auto-fill feature lists the groups based on the letters you type.
- 5 Select the group you want to work with. The AIC custom fields in the group display.

Creating Dependent AIC Custom Fields

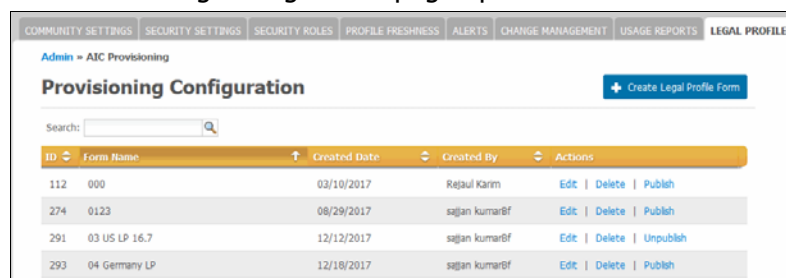
Use this procedure to hide or display an AIC custom field group based on a contact's answer to another AIC custom field.

Dependent custom fields are defined when creating or editing an AIC custom field group.

To create an AIC custom field group that is dependent on an answer to another AIC custom field

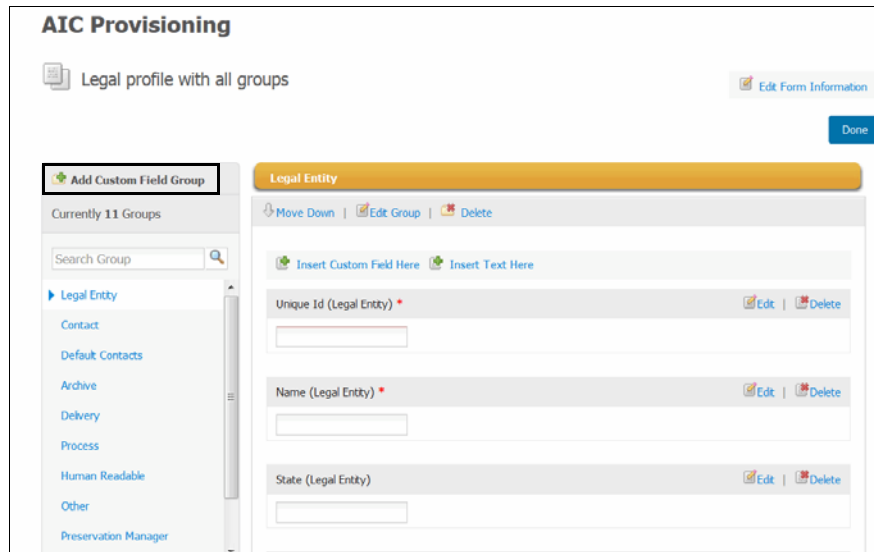
- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



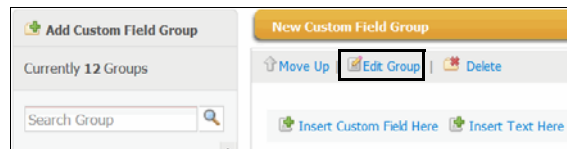
- 2 Search for the legal profile form whose AIC custom field groups you want to work with.
- 3 Click **Edit** for the legal profile form.

The AIC Provisioning page opens.



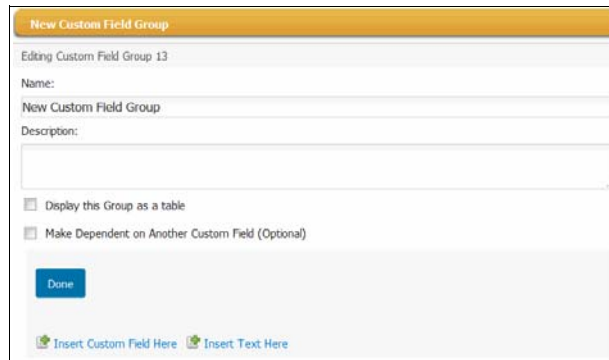
4 Do one of the following:

- If you are adding a new AIC custom field group, click **Add Custom Field Group**. The New Custom Field Group section opens.
- If you are editing an existing AIC custom field group, click the name of the group you want to edit. The Custom Field Group section for the AIC custom field group you selected opens.



5 Click **Edit Group**.

The Editing Custom Field Group section opens.



6 At the bottom of the page, select the "Make Dependent on Another Custom Field (Optional)" check box.

Additional fields display.

- 7** In Custom Field Name, select the name of the AIC custom field on which you want this AIC custom field to depend, such as Reprocess of Others.

- 8** In Answer, select the answer on which you want this custom field to depend, such as True.

- 9** Select the OR or AND button if you want to make the custom field dependent on one or more custom fields.

Note: If AND is selected and two options are highlighted, then both options must be selected for the dependent field to display.

- 10** Click **Done**.

Text that describes the dependency displays under the custom field group.

In the example, Active Community displays this AIC custom field group in a profile only if the answer to the Reprocess of Others custom field is True.

Creating AIC Custom Fields in Data Tables

To allow contacts to provide more than one answer to a custom field, most custom fields can be displayed as headings in a table. Each column heading in the table is a custom field.

Use this procedure to display all AIC custom fields in an AIC custom field group as column headings in a table.

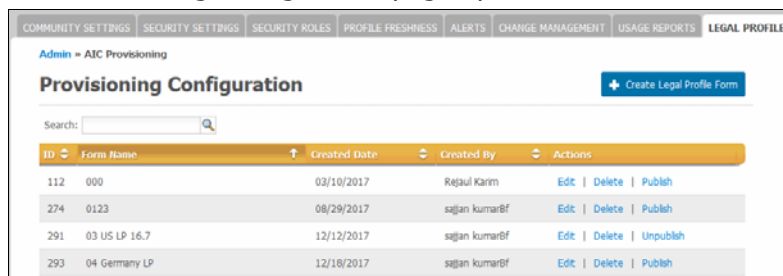
When adding AIC custom fields to the group, create one AIC custom field for each column you want to display in the table. Each column heading is an AIC custom field.

Note: Data table custom fields are defined when creating an AIC custom field group. They cannot be defined when editing a group.

To create AIC custom fields in a data table

- 1 Click **Admin > Legal Profile** tab.

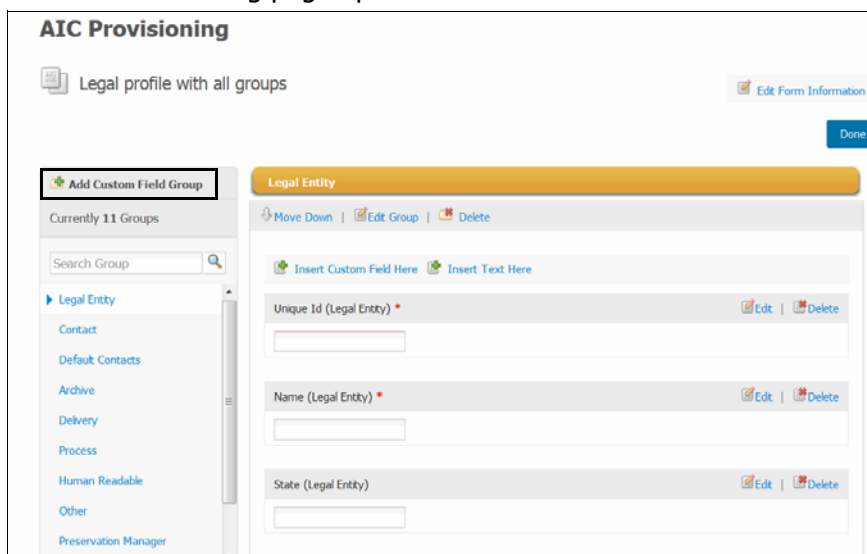
The Provisioning Configuration page opens.



- 2 Search for the legal profile form whose AIC custom field groups you want to work with.

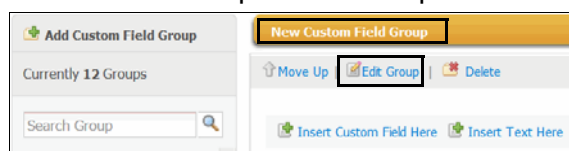
- 3 Click **Edit** for the legal profile form.

The AIC Provisioning page opens.



- 4 Click **Add Custom Field Group**.

The New Custom Field Group section opens. You are replacing the "New Custom Field Group" name in step 7.



- 5 Click **Edit Group**.

The Editing Custom Field Group section opens.

- 6 In Name, type over "New Custom Field Group" and give the group a name, such as "Legal Entity" or "Delivery."
- 7 In Description, type a general description of the custom group, such as the nature of the custom fields it contains.
- 8 At the bottom of the page, select the "Display this Group as a table" check box.

- 9 When adding AIC custom fields to the group, create one AIC custom field for each column you want to display in the table.
- 10 Select the format that is appropriate for the column.

Important: You add custom fields in data tables as described in "Adding AIC Custom Fields to a Legal Profile Form" on page 543. The table doesn't display until contacts edit their profiles.

	Owner Name	U.S. Citizen?	Percentage Ownership
1	Alex Smith	Yes	50
2	Maryanne Brown	Yes	15
3	Elizabeth Winston	No	35

- 11 Define the custom field, then click **Done**.

Re-Sequencing AIC Custom Field Group Tabs

Use this procedure to change the display order of AIC custom field group tabs.

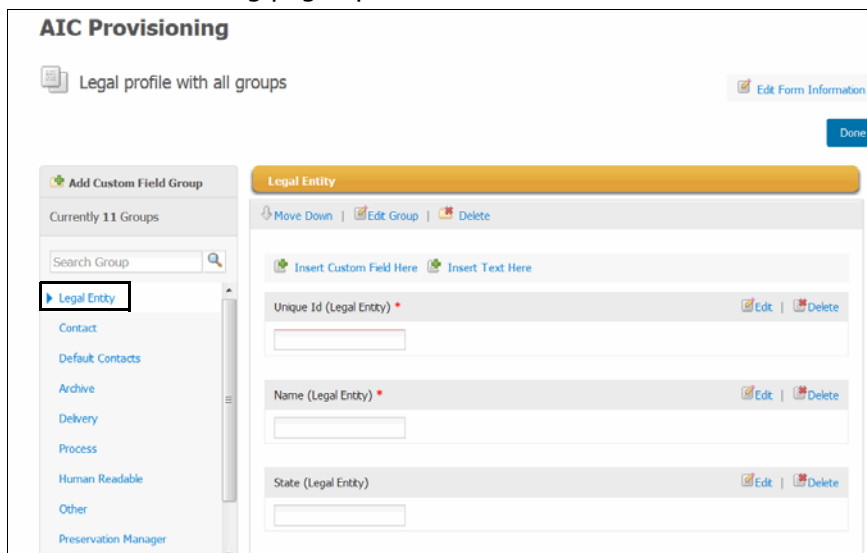
To change the sequence of AIC custom field group tabs

- 1 Click **Admin > Legal Profile** tab.

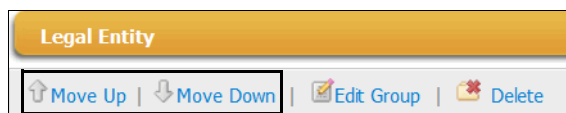
The Provisioning Configuration page opens.

ID	Form Name	Created Date	Created By	Actions
112	000	03/10/2017	Rajaul Karim	Edit Delete Publish
274	0123	08/29/2017	sajan kumarBf	Edit Delete Publish
291	03 US LP 16.7	12/12/2017	sajan kumarBf	Edit Delete Unpublish
293	04 Germany LP	12/18/2017	sajan kumarBf	Edit Delete Publish

- 2 Search for the legal profile form whose AIC custom field groups you want to work with.
- 3 Click **Edit** for the legal profile form.
The AIC Provisioning page opens.



- 4 Select the tab for the custom field group you want to re-sequence.
- 5 Click **Move Up** or **Move Down** to re-sequence the order in which the tab displays on this page and in the legal profile form.



The tab order changes.

- 6 Click **Done**.

Adding Instruction Text

To add instruction text to a custom field

- When defining an AIC custom field, use the **Insert Text Here** link to type any special instructions, such as descriptions, titles, or general information.

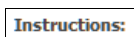


The text displays in the body of the custom field.

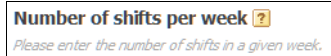
Creating Help Icon Text

To add help icon text to an AIC custom field

- When defining an AIC custom field, use the Instruction field to type help text for the custom field.



The text displays when the contact clicks the help icon for the custom field.



Deleting an AIC Custom Field Group

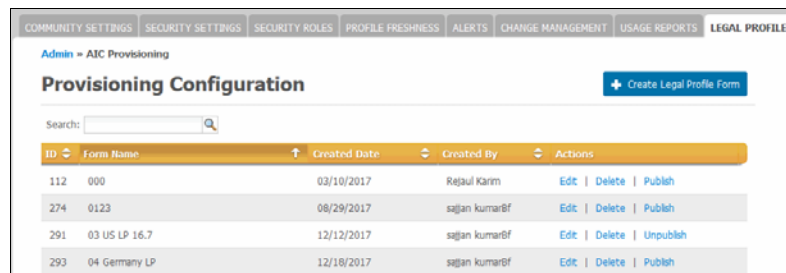
Use this procedure to delete AIC custom field groups, which deletes all AIC custom field in the group.

Note: You cannot delete AIC custom field groups or AIC custom fields that are dependent on other AIC groups or AIC custom fields. You must delete the dependent group or custom field before you can delete the AIC custom field group.

To delete an AIC custom field group

- 1 Click **Admin > Legal Profile** tab.

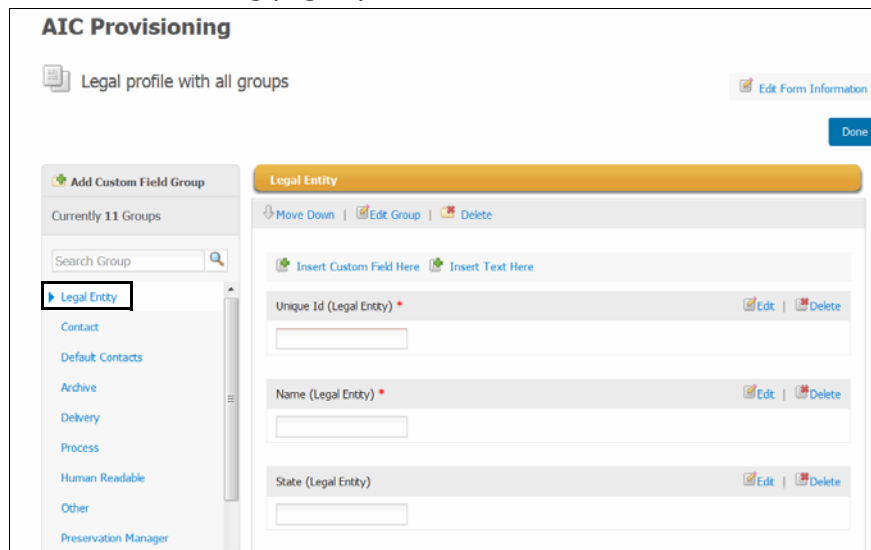
The Provisioning Configuration page opens.



- 2 Search for the legal profile form whose AIC custom field groups you want to work with.

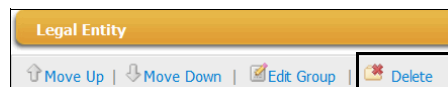
- 3 Click **Edit** for the legal profile form.

The AIC Provisioning page opens.



- 4 Select the AIC custom field group you want to delete.

- 5 Click **Delete**.



The group, and all custom fields in it, are deleted.

Deleting an AIC Custom Field

Use this procedure to delete AIC custom fields in an AIC custom field group.

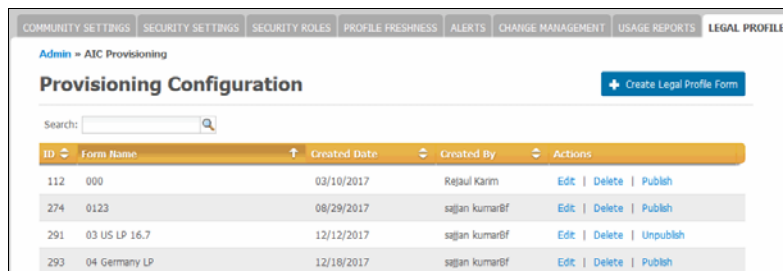
Note: You cannot AIC delete custom field groups or AIC custom fields that are dependent on other AIC groups or AIC custom fields. Before starting this procedure, you must either:

- Delete the dependent AIC custom field, or
- Edit the AIC custom field group or AIC custom field and clear the “Make Dependent on Another Custom Field (Optional)” check box.

To delete an AIC custom field

- 1 Click **Admin > Legal Profile** tab.

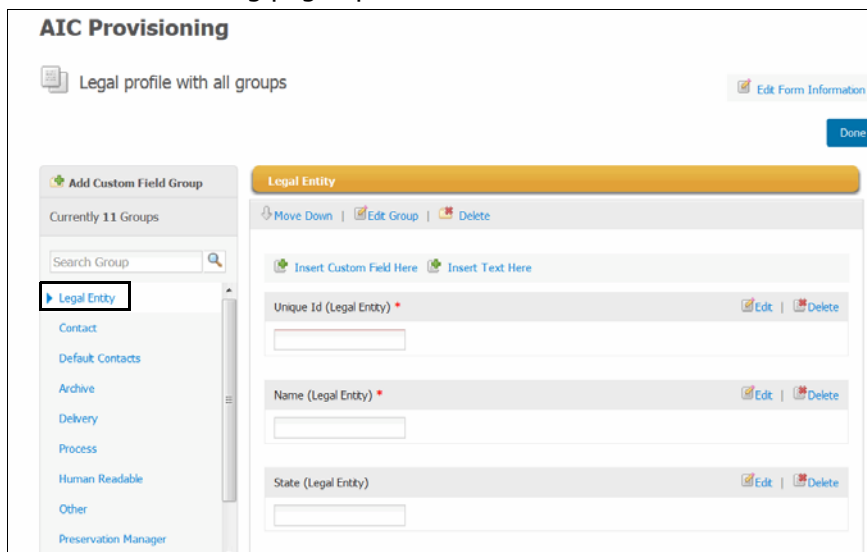
The Provisioning Configuration page opens.



- 2 Search for the legal profile form whose AIC custom field you want to delete.

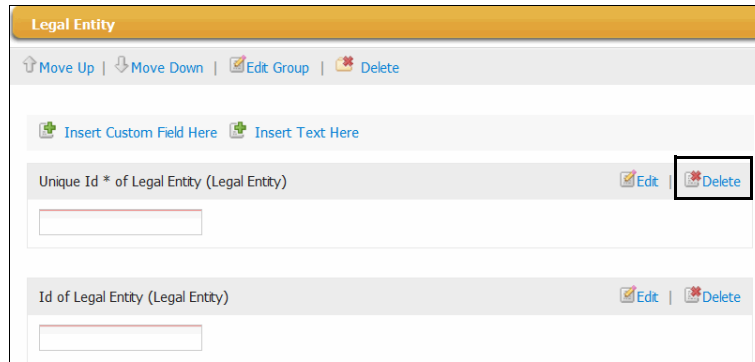
- 3 Click **Edit** for the legal profile form.

The AIC Provisioning page opens.



- 4 Select the AIC custom field group that contains the AIC custom field you want to delete.

5 Click Delete.



The AIC custom field is deleted from the group.

AIC Provisioning - Working with Legal Profile Forms

After a legal profile form has been created, you can edit, delete, publish, and unpublish the form.

Topics include:

- "Editing a Legal Profile Form" on page 556
- "Editing a Legal Profile Form Name or Description" on page 557
- "Deleting a Legal Profile Form" on page 558
- "Publishing a Legal Profile Form" on page 558
- "Unpublishing a Legal Profile Form" on page 559

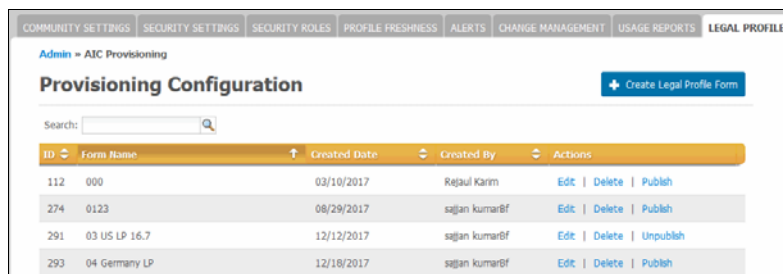
Editing a Legal Profile Form

Security role: Community Administrator

To edit a legal profile form

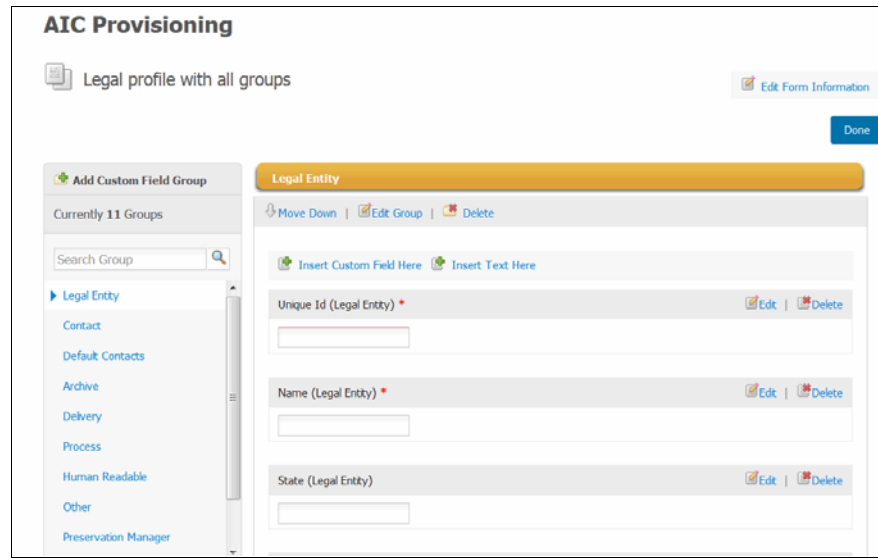
- 1** Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



- 2** Click **Edit** for the legal profile form you want to edit.

The AIC Provisioning page opens.



- 3 Edit the fields. See “Creating a Legal Profile Form with AIC Custom Field Groups” on page 541 for field descriptions.
- 4 Click **Save**.
- 5 The legal profile form is saved. A success message displays.
- 6 To edit legal profile form information such as the form name or description, see “Editing a Legal Profile Form Name or Description” on page 557.

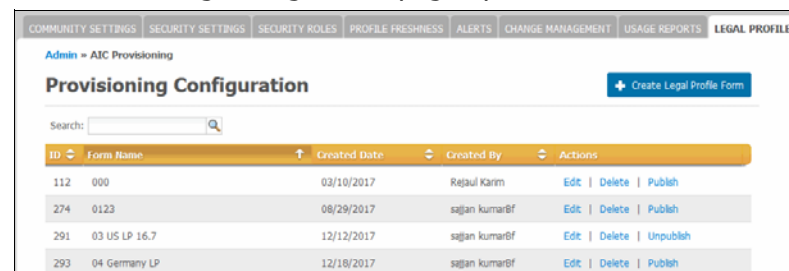
Editing a Legal Profile Form Name or Description

Security role: Community Administrator

To edit a legal profile form name or description

- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



- 2 Click **Edit** for the legal profile form you want to edit.
The Edit Legal Profile Form page opens.
- 3 Click **Edit Form Information**.
The AIC Provisioning page opens.
- 4 Edit the legal profile form name or description.
- 5 Click **Done**.

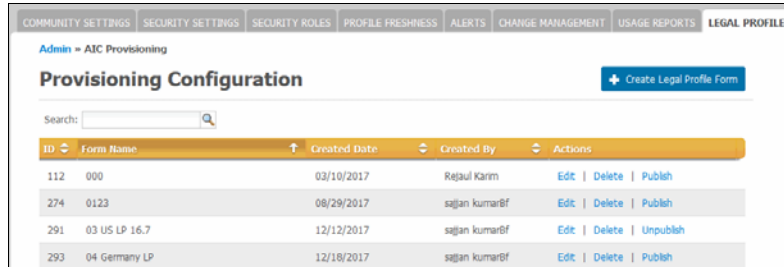
Deleting a Legal Profile Form

Security role: Community Administrator

To delete a legal profile form

- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



- 2 Click **Delete** for the form you want to delete.

A dialog box asks you to confirm that you want to delete the form.

- 3 Click **OK**.

The form is deleted.

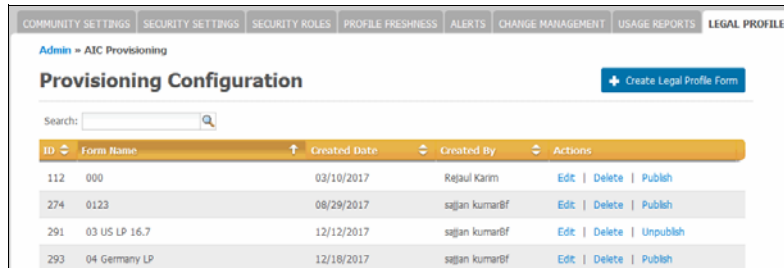
Publishing a Legal Profile Form

Security role: Community Administrator

To publish a legal profile form

- 1 Click **Admin > Legal Profile** tab.

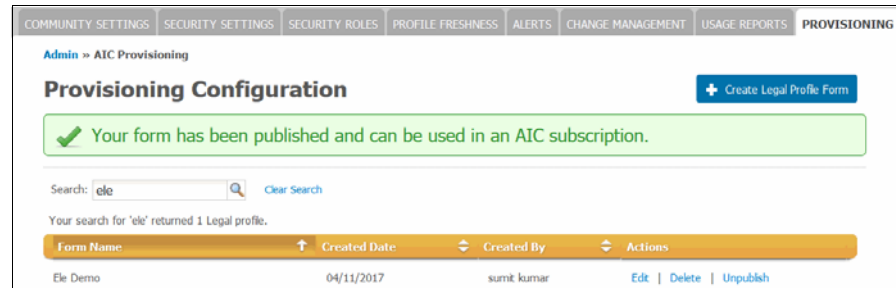
The Provisioning Configuration page opens.



- 2 Search for the form you want to publish.

- 3 Click **Publish**.

The legal profile form is published and can be used in an AIC subscription.

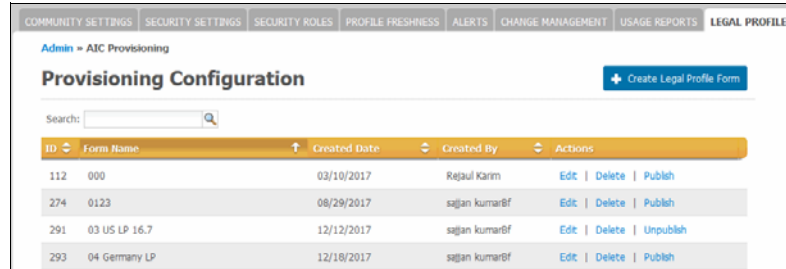


Unpublishing a Legal Profile Form

Security role: Community Administrator

- 1 Click **Admin > Legal Profile** tab.

The Provisioning Configuration page opens.



- 2 Search for the form you want to unpublish.

- 3 Click **Unpublish**.

The legal profile form is unpublished and no longer available for use in an AIC subscription.



AIC Subscriptions - Legal Profiles for Trading Partners

From a Trading Partner or spoke perspective, TPs must meet two requirements before using the Active Invoice with Compliance (AIC) service. Trading partners must complete the registration process, and they must create and submit a legal profile to AIC as part of their AIC subscription.

Note: If the hub designed its registration process to collect legal profile information at the same time it collects company information, a trading partner does not need to create a legal profile manually.

For manual creation, the trading partner creates a legal profile by selecting the appropriate legal profile form for the country of interest, completes the required AIC custom fields, and submits the form to AIC. The legal profile becomes a permanent part of the TP's record, and the TP can use their AIC subscription.

Topics include:

- "Submitting a Legal Profile" on page 560
- "Editing a Legal Profile" on page 561
- "Viewing a Legal Profile" on page 563
- "Deleting a Legal Profile" on page 563

Submitting a Legal Profile

Security role: My Company Permissions > Edit My Company

If information about a legal profile was not collected as part of the registration process, a trading partner (TP) must create a legal profile for their company and submit it to AIC.

To create a legal profile

- 1 Click **My Company > Legal Profile** tab.

The Current Subscription list for your company displays.

Legal Profile	Created Date	Submitted Date	Status	Actions
ND Profile	04/18/2017 11:00		Saved	Edit Delete
uk form 001	04/10/2017 15:24		Saved	Edit Delete
LP Form-2303	04/07/2017 11:39		Saved	Edit Delete
LP Form-2303	04/07/2017 07:38	04/07/2017 07:43	Created	View
LP form for Brazil01	04/07/2017 07:27	04/07/2017 07:34	Created	View

- 2 Click **Add Legal Profile**.

The Creating Legal Profile page opens.

- 3 From the drop-down list, select the legal profile form you want to use to create the legal profile.

Note: Only legal profile forms that were created and published through Provisioning (**Admin > Legal Profile** tab) display in the list. See [“Creating a Legal Profile Form with AIC Custom Field Groups” on page 541](#) and [“Publishing a Legal Profile Form” on page 558](#)).

- 4 Click **Next**.

The Legal Profile Form page opens.

5 Answer the questions displayed in the form.

6 Do one of the following:

- Click **Save** to save your responses, but not submit the legal form to AIC. You can return at another time to complete the form or change your responses.
- Click **Submit to AIC** to send your completed form to AIC for subscription to the AIC application service.

Note: Once a legal profile has been submitted to AIC, it can only be viewed. It cannot be edited or deleted.

- Click **Cancel** to discard your changes and return to the Current Subscription list page.

Editing a Legal Profile

Security role: My Company Permissions > Edit My Company

A trading partner (TP) can edit a legal profile for their company.

Use this procedure if a legal profile was created as part of the registration process and it has a Saved status on the **My Company > Legal Profile** tab. Follow this procedure to modify the information on the form, and click **Submit to AIC**. The form's status changes from Saved to Created.

To edit a legal profile

- 1 Click **My Company > Legal Profile** tab.

The Current Subscription list for your company displays.:

Legal Profile	Created Date	Submitted Date	Status	Actions
ND Profile	04/18/2017 11:00		Saved	Edit Delete
uk form 001	04/10/2017 15:24		Saved	Edit Delete
LP Form-2303	04/07/2017 11:39		Saved	Edit Delete
LP Form-2303	04/07/2017 07:38	04/07/2017 07:43	Created	View
LP form for Brazil01	04/07/2017 07:27	04/07/2017 07:34	Created	View

2 Do one of the following:

- Click the name of the legal profile you want to edit.
- Find the legal profile you want to edit and in the Actions column, click **Edit** for that profile.

The Legal Profile Form for the profile opens.

3 Modify the fields as needed.

4 Do one of the following:

- Click **Save** to save your responses, but not submit the form to AIC. You can return at another time to complete the form or change your responses.
- Click **Submit to AIC** to send your completed form to AIC for subscription to the AIC application service.

Note: Once a legal profile has been submitted to AIC, it can only be viewed. It cannot be edited or deleted.

- Click **Cancel** to discard your changes and return to the Current Subscription list page.

Viewing a Legal Profile

Security role: My Company Permissions > Edit My Company

A trading partner (TP) can view a legal profile for their company.

To view a legal profile

- 1 Click **My Company > Legal Profile** tab.

The Current Subscription list for your company displays.:

Legal Profile	Created Date	Submitted Date	Status	Actions
ND Profile	04/18/2017 11:00		Saved	Edit Delete
uk form 001	04/10/2017 15:24		Saved	Edit Delete
LP Form-2303	04/07/2017 11:39		Saved	Edit Delete
LP Form-2303	04/07/2017 07:38	04/07/2017 07:43	Created	View
LP form for Brazil01	04/07/2017 07:27	04/07/2017 07:34	Created	View

- 2 Find the legal profile you want to view and in the Actions column, click **View** for that profile.

The Legal Profile Form for the profile opens.

Legal Entity	uniqueId	LP_3103_1
	id	blank
	buid	blank
	municipalityCode	blank
	name	23
	state	Alabama
	type	SENDER
	address1	100 street

Deleting a Legal Profile

Security role: My Company Permissions > Edit My Company

A trading partner (TP) can delete a legal profile for their company.

To delete a legal profile

- 1 Click **My Company > Legal Profile** tab.

The Current Subscription list for your company displays.

My Company » ARrequester_191191103 (CMPID923) » Legal Profile

Current Subscription:
AOAIC_HP_SYSEDI_TEST2012

[+ Add Legal Profile](#)

Legal Profile	Created Date	Submitted Date	Status	Actions
ND Profile	04/18/2017 11:00		Saved	Edit Delete
uk form 001	04/10/2017 15:24		Saved	Edit Delete
LP Form-2303	04/07/2017 11:39		Saved	Edit Delete
LP Form-2303	04/07/2017 07:38	04/07/2017 07:43	Created	View
LP form for Brazil01	04/07/2017 07:27	04/07/2017 07:34	Created	View

- Find the legal profile you want to delete and in the Actions column, click **Delete** for that profile.

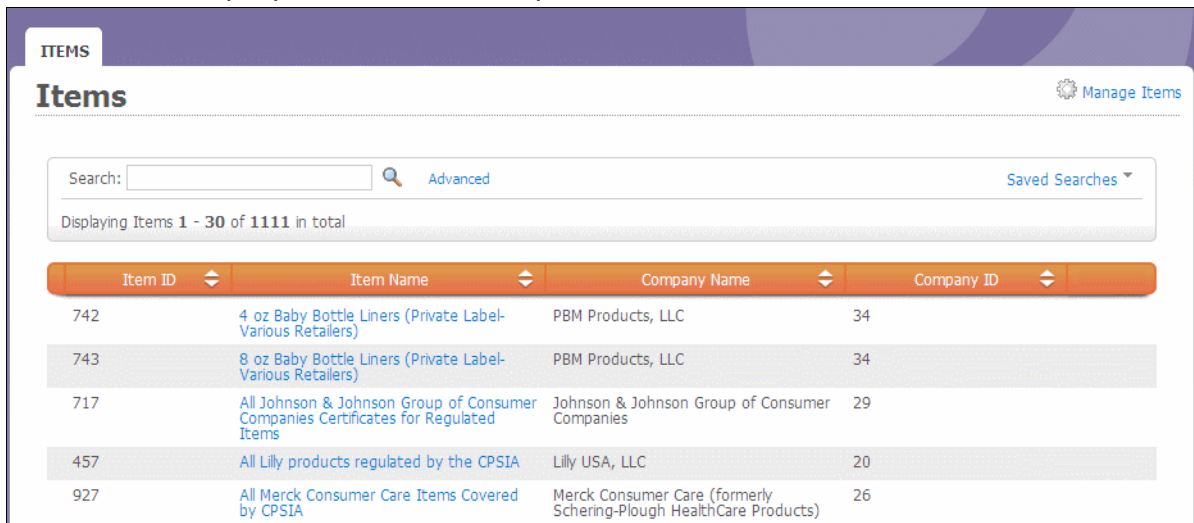
A message asks you to confirm that you want to delete the profile.

- Click **OK**.

This section describes Item Management, which allows you to monitor trading partner performance and risk by tracking product or part-level information.

An *item* represents the product or custom information about a product in an Active Community community. Depending on your user permissions, you can add or search items in a community.

All items including the product unique identifier and name are associated with a company in Active Community.



The screenshot shows a web interface for managing items. At the top, there is a search bar with a magnifying glass icon and the text 'Advanced'. To the right of the search bar is a 'Saved Searches' dropdown menu. Below the search bar, it says 'Displaying Items 1 - 30 of 1111 in total'. The main content is a table with the following columns: Item ID, Item Name, Company Name, and Company ID. The table contains five rows of data.

Item ID	Item Name	Company Name	Company ID
742	4 oz Baby Bottle Liners (Private Label-Various Retailers)	PBM Products, LLC	34
743	8 oz Baby Bottle Liners (Private Label-Various Retailers)	PBM Products, LLC	34
717	All Johnson & Johnson Group of Consumer Companies Certificates for Regulated Items	Johnson & Johnson Group of Consumer Companies	29
457	All Lilly products regulated by the CPSIA	Lilly USA, LLC	20
927	All Merck Consumer Care Items Covered by CPSIA	Merck Consumer Care (formerly Schering-Plough HealthCare Products)	26

Topics include:

- ["Adding Items Manually" on page 565](#)
- ["Importing Items" on page 566](#)
- ["Importing a Data File" on page 568](#)
- ["Deleting Items" on page 571](#)
- ["Exporting Items" on page 571](#)

Adding Items Manually

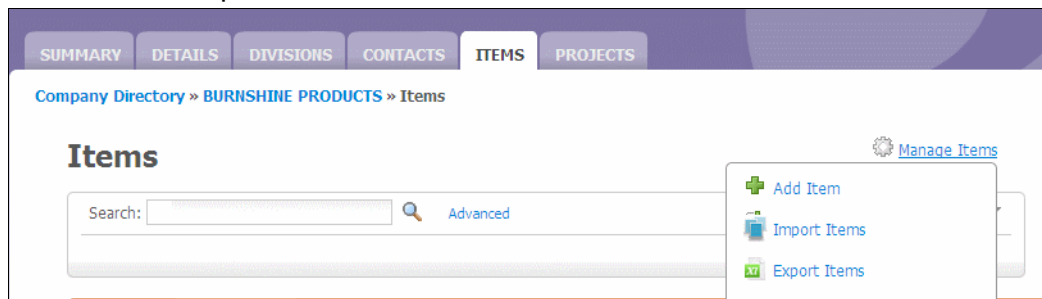
Depending on your user permissions, you can add items to your community. To do this, you can either import them automatically (see ["Importing Items" on page 566](#)) or add them manually using the pages.

The following procedure describes how to add items manually.

When you add items to a community, you must associate them with a company that already exists in Active Community. If the company does not exist yet, add the company first, and then add the item. An item added to a company is automatically viewable to users with view items access. For details, see “[Editing Permissions for Community Security Roles](#)” on page 56.

To add an item

- 1 Click **Profiles > Companies**, and click the profile of the company to which the item will belong.
- 2 Select the **Items** tab, click the **Manage Items** link, and then select **Add Item** from the drop-down list.



- 3 On the New Item page, provide the item Name and any other required fields. All required fields are denoted by an asterisk.
Note: Active Community automatically generates the unique identifier for each new item added to the community.
- 4 Click **Save**.
The item is added and automatically returns you to the Items tab for that company.

Importing Items

Depending on your user permissions, you can import new items into your community.

During the importing process, you will be prompted to map each column from your data file to a field that exists in your community profiles. This can be a standard profile field (such as Item Name) or one specific to your community (such as Product Weight). After mapping your data, Active Community provides you a preview of the Item data to be imported to prevent you from importing incomplete or incorrect information.

OpenText recommends that you import companies first into your community. This allows you to easily import items into existing companies.

Topics include:

- “[Data File Requirements](#)” on page 567
- “[Data File Details](#)” on page 568
- “[Importing a Data File](#)” on page 568

Data File Requirements

- The file to be imported must be in comma delimited format and must have a filename extension of .csv. For example, ContactData.csv.
 - Note:** In Excel, you can save a file in CSV format by clicking **File > Save As** and choosing CSV (Comma delimited) in the Save as type box.
- If you have more than 1000 items to import, it is recommended that you create separate CSV files containing a maximum of 1000 records each to improve import performance. For example, if you have 7000 items to import, you should arrange the data in 7 CSV files containing 1000 items each.
- The first row of the file must contain the column headings. For example, Item Name, Product Description, CompanyID, Quantity. The data values to be imported must start in the second row of the file. For example, Tissues, Soft 2-Ply Tissues, Acme, 20.
- Your file must not contain the # (pound) character, the : (colon) character, or paragraph returns (line breaks). These characters will cause errors during the importing process.
- If you have date fields in your file, they must be formatted as follows: MM/DD/YYYY. For example, January 7, 2009 should be entered as 01/07/2009. If you do not format dates correctly, it will cause errors during the importing process.
- Blank rows between data rows in the file should be eliminated before importing.

Data File Details

If you are importing...	Then you must...
Items	<ul style="list-style-type: none"> ■ Have at a minimum these fields in your data file: Item Name and CompanyID. These fields cannot be blank. ■ Have a Company ID value that matches a company in your community for each item in your file. If the Company ID does not exist in your community, you must import or create the company first, then import items. <p>Note: If you are importing from a company profile directory rather than the Items list page, a companyID is NOT required.</p>
Custom Field Values	<ul style="list-style-type: none"> ■ Create custom fields (for example, Material, Quality Testing) in items in your community before importing. For example, if you have a column in your import file called "Material" containing an item's material content, "Material" should be defined as a custom field in item profiles. In addition, custom field values are case-sensitive; that is, any values in your import file must exactly match those allowed your profiles. ■ Separate multiple-choice answers with a single comma. In addition, you must use the multiple-choice Identifier for the values, not the Label. For an example, see importing multiple-choice custom fields in "Custom Field Requirements for Importing Data" on page 133. ■ Include columns for any required custom fields, and make sure that they are not blank. If they are missing, your data will not be imported.

Importing a Data File

Important: Before importing a data file, be sure it meets the requirements outlined in ["Data File Requirements" on page 567](#) and ["Data File Details" on page 568](#).

To import a data file

- 1 Click **Profiles > Companies**, and click the profile of the company to which the item will belong.
- 2 Select the **Items** tab, and click the **Manage Items** link, and then select the **Import Items** option.

Note: You must ensure that each item in the file has a corresponding Company ID that already exists in Active Community. If the company does not exist in Active Community, you must import or manually create the company first, then import items.

3 On the Upload the File page, click **Browse** to specify the file to be imported.

Upload the File 1 2 3 4
Step 1 of 4

Choose the file to import **Items** into RollStream.

NOTE: The file must be in a comma separated values (CSV) format.

Import File

4 Click **Next**.
The Map the Fields page opens.

Map the Fields 1 2 3 4
Step 2 of 4

Select the field in your file that should be imported into each RollStream field. Mandatory fields are marked in Red with an asterisk (*).

Help Us Identify Your Items

RollStream Field	Import Field
Company ID * →	<input type="text" value="CompanyID"/>
Item Name * →	<input type="text" value="Item Name"/>
Item ID →	<input type="text" value="Item ID"/>
Document →	<input type="text" value="Document"/>
Code →	<input type="text" value="Code"/>
Description →	<input type="text" value="Description"/>
Lot Number →	<input type="text" value="Lot #"/>

5 Use the drop-down lists to map the fields in Active Community that correspond to the fields in the file to be imported.

When importing items, you **MUST** specify a column that contains the Company ID (if importing from the Items list page). Keep in mind that the Active Community field you map to must match the data format of the imported column. For example, you should not map a Product Code (letters and numbers) to a Shipped Date (DD/MM/YYYY).

If a field is *not* included in the .csv file, select IGNORE for that field.

Note: If you do not have the security role of Community Administrator, custom fields contained in tabs to which you do not have View and Edit Question Group permissions are not available for mapping. For details, see ["Editing Permissions for Community Security Roles" on page 56](#).

6 Click **Next**.

The Preview Import page opens.

Item Fields	Value
Item ID	19151
Item Name	Tissues
Company Name	
Company ID	Acme123
Document	http://www.example.org
Code	98-12340
Description	2-ply square tissues
Lot Number	4520190

The first valid row of your file is shown with the Active Community fields that you mapped. (If you are importing data into tables, this does not display.)

If you have item information in your file that will overwrite an existing profile, the Before and After columns show how the profile will be changed after you import your file.

7 Click **Next**.

The Import Queue page opens,

Your information has been added to the import queue.

This process may take a while. You may navigate away from this page while we continue with the import.

We will email you once the import is complete.

[Go to Items.](#)

A message confirms that your import file has been added to the queue for processing.

You can continue to navigate to other parts of Active Community while the import file is processed. To do this, click the **Go to Items** link or one of the main menu options.

Once the file been processed, you will receive an email notification detailing the number of rows that have been successfully or unsuccessfully imported. For those rows that could not be imported due to validation errors, a link to the Download Reject CSV file is also provided.

8 To troubleshoot errors, click **Download Reject CSV File** and examine the Error Messages column for hints on fixing the invalid data. See the format requirements in ["Data File Requirements"](#) on page 567.

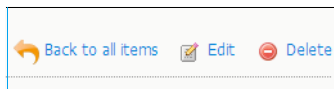
9 Go to the Items page to view your imported data.

Deleting Items

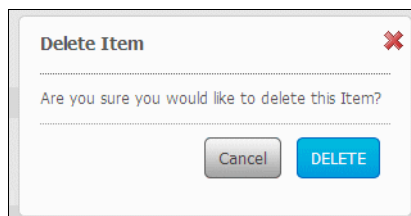
Depending on your user permissions, you can delete items from your community. To do so you must know to which company the item record is related.

To delete an item

- 1 Click **Profiles > Companies**, and click the profile of the company to which the item will belong.
- 1 Select the **Items** tab.
- 2 On the profile, click the ItemID of the item you would like to delete.
- 3 Select the **Delete** link.



- 4 Click **DELETE** to confirm deletion.



Exporting Items

You can export items from a community to a Microsoft® Excel file.

- The first row of the file contains the column headings that correspond to the fields that were exported; for example, Item Name, Product Description, CompanyID, Quantity.
- The second row and beyond contains the data for example, Tissues, Soft 2-Ply Tissues, Acme, 20.

All item fields are exported (including custom fields, even if there are no values in them).

Important: If the user does not have the View Items permission, items cannot be exported for that user.

To export items to an Excel (XLS) file

- 1 Click **Profiles > Companies** or **Contacts**, and click the profile of the company or contact to which the item belongs.

- 2 Select the **Items** tab, and display the list of results that you want to export.
Note: When you first display the Items page, all companies or contacts are listed. You can narrow that list by using Search to display a subset of companies or contacts.

Search

Item ID

Item Name
Tissue

Document

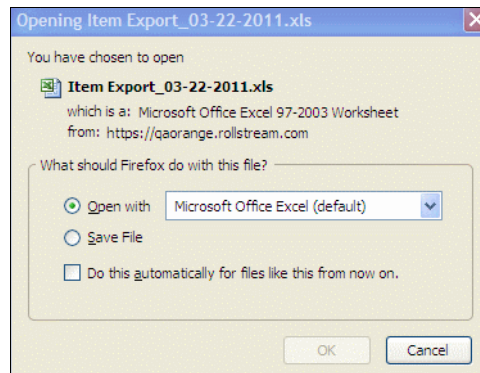
Company ID ?

Company Name
Burnshine

Code

Lot Number

- 3 Click the **Manage Items** link, and select **Export Items**.
A dialog box opens prompting you to open or save the file. If you click **Save File**, you can customize the name of the file and select a destination on your hard disk.



- 4 When you open the file in Excel, you should see all profile fields, including custom fields (regardless of whether they have values in them).
Note: If you do not have View Item permission you cannot export item information.

Frequently Asked Questions **17**

This section explains some of the frequently asked questions (FAQs) about Active Community. It contains the following topics:

- [“Profiles” on page 573](#)
- [“Projects” on page 574](#)
- [“Activities” on page 574](#)
- [“Custom Fields” on page 576](#)
- [“Data Tables” on page 577](#)
- [“Web Forms” on page 578](#)
- [“Roles and Permissions” on page 579](#)

Profiles

- [“What is a profile?” on page 573](#)
- [“What are the sections of a profile?” on page 573](#)
- [“Why is my profile photo distorted?” on page 573](#)

What is a profile?

A *profile* represents you, another person, or a company in an Active Community community. It contains contact information, a photo, and any community-specific information in custom fields. For a profile to be considered 100% complete, most fields need to be filled in.

What are the sections of a profile?

The profile is divided into two main sections: core fields and custom fields (or credentials). Core fields include name, address, phone, and other contact information. The second section of the profile contains custom fields. You can customize the custom fields section according to the information you want to collect from your partners.

Why is my profile photo distorted?

If the profile photo you uploaded is larger than the recommended image size of 114 pixels wide by 152 pixels high, it may be distorted. If your photo is wider than 114 pixels, the width will be resized and scaled down. If your photo is more than 152 pixels high, it may appear cropped at the bottom.

Projects

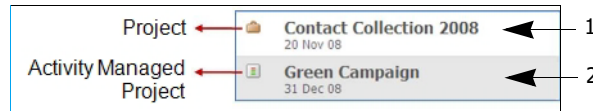
- [“What are projects?” on page 574](#)
- [“Why should I create a project?” on page 574](#)

What are projects?

A *project* is a workspace to help you organize and track activities, files, web forms, and other items to be completed. Whenever you create an item (such as a message or web form), it is archived in the project.

There are two types of projects: regular and activity managed.

- Regular projects can be used for ongoing projects, such as updating your community directory.
- Activity managed projects are ideal for campaigns that have fixed start and end dates, and have steps to be completed in order. You can assign due dates to each step, so that if one step is incomplete, the remaining steps won't start. For details on activity managed projects, see [“Activity Managed Projects” on page 277](#).



Key	Description
1	Project
2	Activity Managed Project

Why should I create a project?

A project is necessary to communicate or collaborate with your business contacts, partners, vendors, or suppliers. Each project contains activities which represent an action or step to be performed. For example, one activity might be to send a satisfaction survey to a specific group of your suppliers. Another activity might be to inform all of your trading partners about new policy changes. Depending on your user permissions, you may not be able to create a project directly; you may need to contact your Community Administrator to do so.

Activities

- [“What is an Activity?” on page 574](#)
- [“What do I need before I create an activity?” on page 575](#)
- [“What happens after I start an activity?” on page 575](#)
- [“What is activity management?” on page 575](#)
- [“How do I turn on activity management?” on page 575](#)

What is an Activity?

An *activity* is any item that can be completed within a project. For example:

- Send a survey to suppliers
- Issue a letter to the entire community
- Update a business contact's profile

An activity can be assigned to one or more contacts in your community.

What do I need before I create an activity?

Before creating an activity, you must create a project. In addition, it is recommended that you create any web forms needed prior to creating an activity. This will improve activity creation.

Example: Suppose you want to send a survey to a set of suppliers. After creating a project, you do the following:

- Create a web form that contains the survey questions and possible answers
- Create an activity and link it to the web form
- Add suppliers as participants in the activity

What happens after I start an activity?

After starting an activity, communications are sent to the activity participants (the trading partners you selected to receive the survey or email message). For example, if you created an activity to send an email reminder to all participants to update their profile, the email is sent when you click Start on the activity in a regular project. (In an activity managed project, the activity is started when the project is started, or when the previous activity is complete.)



After an activity is started, you can add but not remove participants from it.

What is activity management?

Activity management describes projects that contain activities with due dates and dependencies. These projects also have start and end dates. By enabling activity management for a project, you can:

- Schedule a project to automatically start in the future
- Have an activity automatically start after another activity is completed
- Automatically send activity reminder email messages to participants

Activity managed projects are identified by their icon in the project summary list.

Project	 Contact Collection 2008 20 Nov 08	← 1
Activity Managed Project	 Green Campaign 31 Dec 08	← 2

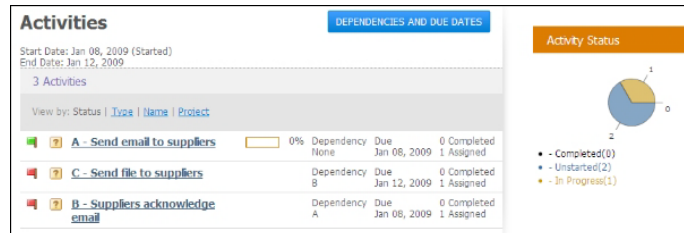
Key	Description
1	Project
2	Activity Managed Project

How do I turn on activity management?

To use activity management, all you need to do is to check the Enable Activity Management check box when you create a project. After you do this, you can add

activities and set their due dates, dependencies, and reminder notifications. For details, see [“Creating a Regular or Activity Managed Project”](#) on page 287, [“Adding an Activity to a Project”](#) on page 290, and [“Customizing Upcoming and Overdue Reminder Messages”](#) on page 315.

Below is an example of an activity managed project with three activities. Note that Activity A (Send Email to Suppliers) is in progress; Activity B (Suppliers Acknowledge Email) will not begin until Activity A is complete.



Custom Fields

- [“What are custom fields?”](#) on page 576
- [“When do I use a custom field?”](#) on page 576
- [“Who can see and edit custom fields?”](#) on page 576
- [“What is the difference between a custom field and a tag?”](#) on page 576
- [“How do I get custom field values into Active Community?”](#) on page 577
- [“How do I ensure my partners keep custom field data up-to-date?”](#) on page 577

What are custom fields?

A *custom field* is a question or input field that allows you to gather and retain key information about your trading partners, customers, sales reps, or other contacts in your community. Custom fields are located on your partner's profile.

When do I use a custom field?

Use a custom field to expand and tailor the information contained in the company and contact profiles in your community, thereby adding value and increasing usability.

Who can see and edit custom fields?

Each custom field group has its own view and edit permissions. If you are a Community Administrator, you can control which community members can see particular custom field groups. If you have Active Community Registration enabled, any custom fields you create can display in your company registrations.

What is the difference between a custom field and a tag?

Tags are intended for ad hoc grouping of companies or contacts by any user in your community. A tag is comprised of a single keyword or phrase and does not

contain detailed information. Tags are often used during the process of searching for a set of profiles in a community.

Custom fields are more structured than tags, as they collect detailed information about your trading partners (including documents and images). In addition, only Community Administrators can (usually) create and modify custom fields.

How do I get custom field values into Active Community?

After creating a custom field, you need to complete it with information from your community. There are several ways you can do this:

- Copy the custom field to a web form, then issue the web form as a survey. For details, see ["Creating a Web Form for Inside Your Community" on page 355](#).
- Send an email message to your community, prompting them to update their profiles. For details, see ["Adding an Activity to a Project" on page 290](#).
- Import custom field values from a text file. For details, see ["Adding Custom Field Groups" on page 240](#).
- If you have Registration enabled, you can collect information for any custom field in your community via a Registration approval process. After final approval, Company will be created with collected values for the custom field.

How do I ensure my partners keep custom field data up-to-date?

The easiest way is to have automatic email reminders sent to your partners when their contact or company profile becomes stale. For details, see ["Setting Time Intervals for Profile Reminder Emails" on page 45](#).

Data Tables

- ["What is a data table?" on page 577](#)
- ["How do I create a data table?" on page 577](#)
- ["How do I add custom fields to a data table?" on page 578](#)
- ["How do I fill in a data table?" on page 578](#)

What is a data table?

A data table is one where all custom fields in the group are organized into a data table or grid. A data table allows for multiple answers to each question, and enables sharing of data.

How do I create a data table?

To create a data table, you select the Display this group as a table option when creating the group. For example, you might have a data table called "Company Ownership" which will contain custom fields that indicate the company owners and their percentage of ownership in the business.

How do I add custom fields to a data table?

After you create the group, you add custom fields that correspond to each column in the grid. For example, you might have custom fields to contain the names of the company owners, their citizenship, and their percentage of ownership in the company. [“Custom Field Requirements for Data Tables” on page 134](#)

How do I fill in a data table?

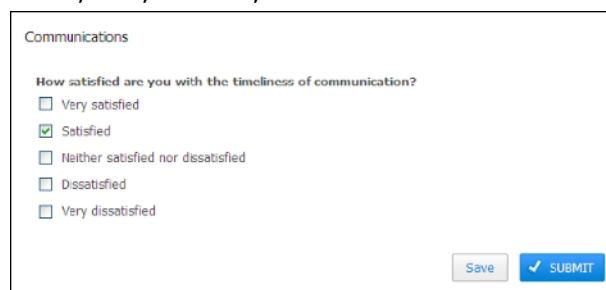
Working with a data table is similar to working with a spreadsheet in Microsoft Excel: there are rows, resizable columns, and column headings. To fill in data, click **Add Row** and click on a cell in the table. Clicking the cell makes it editable. As you input data, you can press the TAB key to move from one cell to the next.

Web Forms

- [“What is a web form?” on page 578](#)
- [“How is a web form used?” on page 578](#)
- [“How do I collect company-level responses?” on page 579](#)
- [“Can my business contacts respond anonymously?” on page 579](#)
- [“What is a public web form?” on page 579](#)
- [“Why should I use a public web form?” on page 579](#)
- [“How do I create a public web form?” on page 579](#)

What is a web form?

A *web form* is an electronic form that allows you to gather or survey information about the trading partners, customers, sales reps, or other contacts in your community. The web form's questions and input fields can include text boxes, data tables, lists, buttons, and check boxes.



Communications

How satisfied are you with the timeliness of communication?

Very satisfied

Satisfied

Neither satisfied nor dissatisfied

Dissatisfied

Very dissatisfied

Save SUBMIT

How is a web form used?

You can use a web form to quickly and conveniently prompt your business contacts, trading partners, suppliers, and other community members for information. For example, you can create a survey to issue to suppliers to ask whether they are compliant with an industry standard. Or, you can create a form to issue to trading partners to prompt for company information such as average sales volume and inventory.

How do I collect company-level responses?

To collect company responses (instead of individual contact responses) to a survey, you can set a Complete by Company option in the activity.

Can my business contacts respond anonymously?

Yes. You can set the web form to Community (with anonymous responses) or Public which means that the First Name, Last Name, Company Name, and Company ID of the contact will not display in your web form results. Only the answers to questions will be shown.

What is a public web form?

A public web form is a form that can be sent to contacts outside the Active Community community. These contacts access the web form via a link (URL) which allows them to complete the web form without having to be part of the Active Community community. After they submit the web form, the results are recorded in Active Community as anonymous responses.

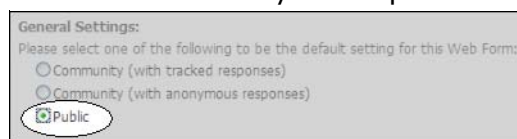
Why should I use a public web form?

You may want to use a public web form when you want to gather information about contacts that are not yet part of your Active Community community. For example, suppose you conducted a national sales meeting and you want to send a survey to registrants that are not yet part of your Active Community community. Later, you can easily add these people to your community by ["Importing Companies and Contacts Using CSV Files" on page 128](#).

How do I create a public web form?

To create a public web form, you select the Public option when creating the form. Since respondents are unknown, you cannot add profile custom fields to be part of the form. After you save the public form, keep in mind that you cannot go back and make it accessible by contacts in Active Community unless:

- You have not published it, and
- You do not have any test responses



General Settings:
Please select one of the following to be the default setting for this Web Form:

- Community (with tracked responses)
- Community (with anonymous responses)
- Public

After you create the form, all you need to distribute to your contacts is the URL of the public web form. You do not need to link the form to a project activity.

Roles and Permissions

- ["What is a role?" on page 580](#)
- ["What is a permission?" on page 580](#)
- ["What is a security role?" on page 580](#)

- "How do I get a security role?" on page 580
- "How do I change permissions for a security role?" on page 581

What is a role?

In Active Community, you can control user access through the use of security roles and permissions. As a Community Administrator, you can grant or deny access to all areas of Active Community, including contacts, companies, projects, and custom fields. You cannot grant or deny access to an individual user; you must control access via the user's role.

Note: A *role* is a set of permissions that control the actions the contact can perform in the Community and projects. For example, a Contact with a role of Project Administrator can add a new Project.

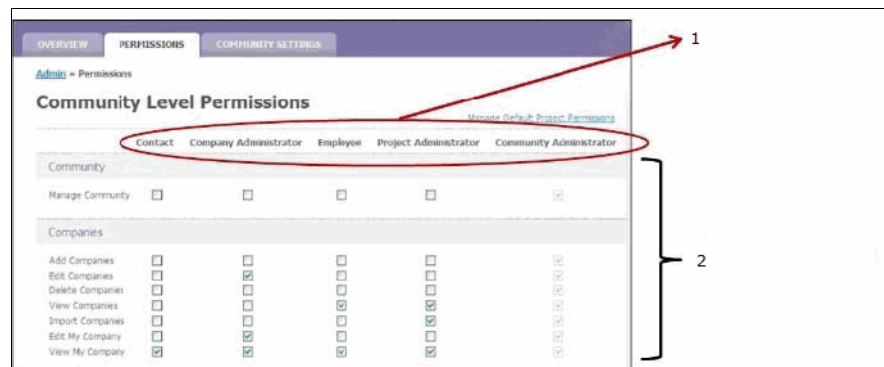
What is a permission?

A *permission* is a right that controls access to functionality in Active Community. In other words, it controls whether a user has the right to perform a specific action. For example, the right to edit a company profile, add an activity to a project, or view a custom field.

A group of permissions comprise a security role.

What is a security role?

A *security role* consists of a set of permissions that control the amount of access the user has in the community. For example, a contact with a security role of Project Administrator can add a new project, import companies, and view custom fields.



Key	Description
1	Security Roles
2	Permissions

How do I get a security role?

Every Active Community user has a security role. The default security role for all contacts added to a community is Everyone.

By default, only Community Administrators can change roles for a user. To do so, the administrator edits the user's profile in Active Community. Some roles are

automatically assigned by virtue of performing an action in Active Community; for example, you become a Project Owner upon creating a project.

How do I change permissions for a security role?

By default, only Community Administrators can edit the permissions associated with a security role. For details, see ["Editing Permissions for Community Security Roles"](#) on page 56 or ["Ensuring Contacts Respond to Custom Field Questions"](#) on page 271.

Glossary

This section contains definitions of various terms used within Active Community.

A

activity—An item that can be completed within a Project. For example, send a survey, issue a letter, update profile, etc. An Activity can be assigned to one or more contacts within a company.

C

community—Group of all Contacts and Companies.

company—An organization to which Contacts belong. A Company can be a parent organization or a division within another Company.

contact—A person who has a profile in Active Community. A Contact is always associated with a Company. The actions the Contact can perform are controlled by their role in the system. Examples of contacts include a supplier, vendor, distributor, customer, or employee.

custom field—A question or indicator that categorizes Companies or Contacts.

custom field group information specific to a community that uniquely identifies or categorizes Companies or Contacts.

F

freshness—The update status of a profile.

O

owner—A Contact who is responsible for maintaining the community (name, logo, etc).

P

permission—A right that allows a user to perform an action in Active Community. For example, "Manage Community." A set of permissions comprise a Role.

profile—profile represents you, another person, or a company in an Active Community community. It contains contact information, a photo, and any community-specific information in custom fields.

project—A workspace for organizing a set of activities, files, web forms, and other items to be accomplished. A Project includes a specific group of Contacts (known as Participants). By default, Active Community provides a basic Project containing all Contacts as Participants (All Your Contacts).

Q

question—Prompts the recipient for information within a web form. Usually comprised of question text and possible answers with check boxes, radio buttons, and lists.

question group—A logical group of questions in a web form, contained in a separate section with a name and description.

R

role—A set of permissions that control the actions the contact can perform in the Community and projects. For example, a Contact with a role of Project Administrator can add a new Project.

T

tag—A keyword or phrase specific to a community that uniquely identifies or groups Companies or Contacts.

title—A named role within an Organization (VP, etc)

W

web form—An electronic form that allows a user to gather Contact and Company data that will be stored in Active Community. The form may consist of question text, boxes, lists, buttons, and other prompts for information.

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