#### picoCMS Client Training - A pico-cms.com

Find Our User Manual at <u>http://pico-cms.com/user-manual</u> Login: URL(domain name/login)

## Layout to training:

- I. Overview about pico
- II. Users
  - a. Adding a User
  - b. Edit Existing User
- III. Content
  - a. Edit Interior Pages
  - b. Basic Toolbar
  - c. Adding text
  - d. Links
  - e. Images
  - f. Linking PDFs
  - g. Blog
- IV. Pages
- V. Support & Help

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# Overview about pico

Toolbar is at the bottom of the page:





- Add New Content = New content box to page (green lines around striped boxes
- Edit Content = Edit current content (blue lines around striped boxes)
- Remove Content = Removes a content box itself not the content inside (red lines around striped boxes)
- Add Existing Content = Adds new existing content box to page (green lines around striped boxes)
- Move Content = Move boxes around the page (yellow lines around striped boxes)

#### **ICON KEY:**

- **Up & Down Arrows =** adjust order
- **Red X** = Deletes from navigation only (not from Site)
- **Green + =** Adding a Sub-navigation
- **Side Arrow =** Hides or Shows pages within Navigation

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# II. Users

| Ad | din | g | а | U | se | r |
|----|-----|---|---|---|----|---|
|    |     | - |   |   |    |   |



- 1. User > Add New User
- 2. Fill Out: (passwords are case sensitive)

| ministrator 💠 |                |
|---------------|----------------|
|               |                |
|               |                |
|               |                |
|               |                |
| •             |                |
|               |                |
|               | lministrator ÷ |

- Moderator
- Author
- Registered User

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## **Edit Existing User**

1. User>Manage Current Users



2. Select User = click Green arrow Red arrow to delete current user

| Manage       | e Users             |   |                      |              |           |         |
|--------------|---------------------|---|----------------------|--------------|-----------|---------|
| Search for u | ser:                | Search                                  | Bro                  | wse by page: | 1 ‡       |         |
| Username     | Access              | Last Login                              | E-mail Address       | First Name   | Last Name | Actions |
| admin        | Super Administrator | 03:23 January, 23 2014<br>69.207.33.12  | aj@sisarina.com      |              |           |         |
| rebecca      | Administrator       | 04:17 February, 16 2014<br>68.50.12.161 | rmcelhatten@vosm.com |              |           |         |
| sisarina     | Administrator       | 01:19 March, 13 2014<br>69.140.36.15    | info@sisarina.com    |              |           |         |

**3.** Fill Out: (passwords are case sensitive)

| Add New Us                | ser              | x |
|---------------------------|------------------|---|
| Required Inform           | nation           | Т |
| Username                  |                  | L |
| Password<br>6+ Characters |                  |   |
| Confirm                   |                  | L |
| E-mail Address            |                  | l |
| User Access               | Administrator \$ | L |
| Optional Inform           | ation            | L |
| First Name                |                  | L |
| Last Name                 |                  | L |
| Profile Informat          | ion              | L |
| User Group/Profile        | • •              |   |
| Add User                  |                  |   |

User Access = Level of Responsibility

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## III. Content Editing Interior Pages

1. Content / Edit Content

| • | Add New Content      |
|---|----------------------|
| • | Add Existing Content |
| • | Edit Content         |
| • | Remove Content       |
| • | Move Content         |
|   | •••••                |

\*\*Select Edit Content again to get out of editing mode\*\* 2. Click on gray striped area of editable box

\*\*Always select stripes & not links\*\*

## **Basic Toolbar:**

| Edit Content  |   |
|---|---|
| Source       Source | Options<br>Content<br>CSS<br>Javascript<br>Display Settings<br>Authors<br>HTML Settings |



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# Adding Text:

#### **Clipboard Options:**

| Ed | it Content |   |   |   |   |   |   |    |   |            |
|----|------------|---|---|---|---|---|---|----|---|------------|
| l  | Source     | X | 6 | Ē | Ē | Ē | ٩ | ₽ţ | F | <u>I</u> x |

- 1. Type directly into box. It will automatically set the correct font/size.
  - Header: set to H1, keep uniform on every page.
  - Other: use H2, H3 and Normal

2. Paste as plain text: Removes styling & outside code: SAFEST WAY

3. Paste from Word: Removes excess coding that word documents carry, but keep most of the formatting. Font styles/colors often different from website settings.

4. Copy and paste directly into content box.

• Clear formatting using remove format icon. This takes out the styling elements, but keeps basic structure and links.



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Links:



- 1. Content>edit content
- 2. Click content box you are adding link to (stripped boxed area)
- 3. In editing window: Highlight text you want to link
- 4. Clink Link Icon (on the toolbar)



6. Link box appears, copy and paste link

| Link X                    |  |
|---------------------------|--|
| Link Info Target Advanced |  |
| URL ¢                     |  |
| Protocol URL              |  |
| Browse Server             |  |
|                           |  |
|                           |  |
| Cancel                    |  |

7. Click target tab and select New Window (when finished click OK)

| Target                    |    |      |  |
|---------------------------|----|------|--|
| <frame/>                  |    |      |  |
| <popup window=""></popup> |    |      |  |
| New Window (_blank)       |    |      |  |
| Topmost Window (_top)     |    |      |  |
| Same Window (_self)       |    |      |  |
| Parent Window (_parent)   |    |      |  |
|                           |    |      |  |
|                           |    |      |  |
|                           |    |      |  |
|                           |    |      |  |
|                           | C. | maal |  |

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Link to address outside site: Type in or copy and paste the URL

- Select Target: Choose from drop down menu: (usually new window in this case)
- Select Advanced: to put advisory title if desired.
- Link within site. Type: /name of page on site (example: /about; /team-sisarina)
- · Protocol will automatically switch to "other"

## Images:

## 2 Step Process:

## Step 1

- 1. Click image button on toolbar
- 2. Image Properties Window Appears:

| mage Properties  | ×  |  |
|--|--|--|
| Image Info Link Advanced   |  |  |
| JRL  |  |  |
|  | Browse Server                              |  |
| Alternative Text   |  |  |
|  |  |  |
| Nidth Preview  |  |  |
| Lorem ipsum dolor sit amet, co   | nsectetuer adipiscing                      |  |
| Height   | at diam. Maecenas                          |  |
| non, facilisis vitae, nulla. Aenea                                       | an dictum lacinia                          |  |
| Sorder felis euismod neque, sed ornar                                    | culls aliquam, orci<br>re massa mauris sed |  |
| velit. Nulla pretium mi et risus. I<br>tempor id, cursus ac, ullamcorr   | Fusce mi pede,                             |  |
| ISpace tortor. Curabitur molestie. Duis                                  | velit augue,                               |  |
| pellentesque egestas eros. Inte  | eger cursus, augue in                      |  |
| /Space cursus faucibus, eros pede bib<br>tempus tellus justo quis ligula | endum sem, in<br>Etiam eget tortor         |  |
| Mignmont   |  |  |
| <pre><not set=""></not></pre>  |  |  |
|  |  |  |
|  | Cancel                                     |  |
|  |  |  |

Browse server: takes you to images already on your server
 Click Browse again to upload a new image

- Create folders for categories of images: example: blog images
   Open to the desired folder before you upload new images
- · To check and adjust image properties click camera on upper right
- Options to resize or manually enter dimensions
- Click resize, save and add.
- Rename image accordingly
- Click on name of image to add to page.

#### Step 2: To Upload a new image

- Open to the appropriate folder
- Click Browse
- Click Open
- Alternative text: important to add
  - 1. SEO-if image is broken people see text and still linked
  - 2. Google searches based on words, not images
  - 3. Blind people using readers
- Sizing/alignment
- Link to add url; set target
- Advanced to add advisory title
- Can type in URL, but recommend upload images to server for more control
- Make sure not to have any spaces in image name

#### Notes:



## Linking PDFs

- 1. Highlight the text you want to link
- 2. Select the link button



4. (a new box appears) click Browse Server again



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# 5. select correct PDF

6. (it will now appear in the list of images) select it

# 7. (the URL will now be filled in)

9.

| Link  | × |
|---|---|
| Link Info Target Advanced                       |   |
| Link Type                                       |   |
| URL \$  |   |
| Protocol UPI                                    |   |
| <pre>cother&gt; 	 /upload/placebolder.pdf</pre> |   |
|   |   |
| Browse Server                                   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |
|   |   |

8. click on the tab that says Target and select New Window from drop down

|          | Link   | ×                   |  |
|----------|--|---------------------|--|
|          | Link Info Target Advanced  |                     |  |
|          | Target   |                     |  |
|          | <pre>✓ <not set="">   <frame/>   <popup window=""></popup></not></pre>                         |                     |  |
|          | New Window (_blank)<br>Topmost Window (_top)<br>Same Window (_self)<br>Parent Window (_parent) |                     |  |
|          |  |                     |  |
|          |  | Cancel OK           |  |
| click OK |  |                     |  |
|          | Sisarin  | PANDED. 240 470 074 |  |

# Blog



- 1. Content / Edit Content
- 2. Opens Blog Editing Window

| Edit Content                 |                  |            |    | X                                |
|------------------------------|------------------|------------|----|----------------------------------|
|                              |                  |            |    | Options                          |
|                              |                  |            |    | Content                          |
|                              |                  |            |    | Javascript                       |
|                              | All Posts        |            |    | Display Settings<br>Blog Options |
| An Inside Track to the Emmys |                  | 09/13/2013 | ⊳ജ |                                  |
|                              |                  |            |    |                                  |
|                              |                  |            |    |                                  |
|                              |                  |            |    |                                  |
|                              |                  |            |    |                                  |
|                              |                  |            |    |                                  |
| Filter by title:             |                  |            | 1  |                                  |
|                              |                  |            |    |                                  |
|                              | -or-             |            |    |                                  |
|                              | Start a new post |            |    |                                  |
| Post/Story Title:            |                  |            |    |                                  |
|                              |                  |            |    |                                  |
| Post/Story Date:             | 09/24/2013       |            |    |                                  |
|                              | Start new post   |            |    |                                  |
|                              |                  |            |    |                                  |
|                              |                  |            |    |                                  |

3. Click green arrow next to existing post OR Start new post

4. Same editing window as regular content boxes

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| <b>Options</b>                                      |  |
|---|--|
| Edit Post<br>Advanced<br>Saves<br>Image<br>Comments |  |
| comments  |  |

- Advanced: add author/categories/tags
- · Saves: to restore to previously saved versions
- Image: to add a thumbnail image to the blog summary



- Preview to show appearance of post before publishing
- Save
- Save & Publish
- Back to All Posts

#### **Blog: Right Side of Page**

- Content>Edit Content Under Recent Posts to select number of entries
- Content>Edit Content on Search to change order or hide what appears

## Notes:

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#### picoCMS Client Training Checklist:

Here is the link for your site while on our development server:

- 1. \_\_\_\_ I have been told about using Firefox or chrome and NOT using Internet Explore as my browser.
- 2. \_\_\_\_ I have been told about clearing my cache.
- 3. \_\_\_\_ I was told about updating PICO and the importance of doing this on a regular basis.
- 4. \_\_\_\_ I have been setup as an <u>Admin</u> user in picoCMS.

Username: Password: (case sensitive)

- 5. \_\_\_\_ I feel comfortable setting up additional users if needed.
- 6. \_\_\_\_ I feel comfortable navigating through the Basic Toolbar.
- 7. \_\_\_\_ I am capable of creating a link within my website.
- 8. \_\_\_\_ I am aware of the size requirements when uploading images and the

problems that can occur if these requirements are not followed.

i. Images should be no larger then 800 pixels / 1MB.

- 9. \_\_\_\_ I understand and feel comfortable creating tables.
- 10. \_\_\_\_ I am comfortable cloning pages.
- 11. \_\_\_\_ I have setup my account for using support.sisarina.com services and I feel comfortable with starting a support ticket if/when needed.

: Domain Name \_\_\_\_\_: Pin

sarin

| ign: | Date:   |
|------|---|
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|      | $\Lambda \Lambda \Lambda \Lambda \Lambda \Lambda \Lambda$ |

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# Tables

1. Click on table icon

Edit Content

|                                       | Javascript                                   |
|---------------------------------------|--|
| Styles • Normal • Font • Size • A+ A+ | Display Settings<br>Authors<br>HTML Settings |

- 2. Set number of columns and rows
- 3. Width/Height adjustable
- 4. Headers
- 5. Border size 0 = Borders become invisible

| Table Properties      | Advanced     |
|-----------------------|--------------|
| Rows                  | Width        |
| 3                     | 500          |
| Columns               | Height       |
| 2                     |              |
| Hoodors               | Coll spacing |
| None 4                | 1            |
| Border size           | Cell padding |
| 1                     | 1            |
| Alignment             |              |
| <not set=""> \$</not> |              |
|                       |              |
| Caption               |              |
|                       |              |
| Summary               |              |
|                       |              |
|                       | Canaal       |
|                       | Cancer       |

Once Tab

1. Right click = table properties a. Add cells/add rows/add columns

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**Pages** 



1. Pages / Edit This Page

Edit This Page: (Filled out for every page)

| Edit Page                         | <b>2</b> |
|-----------------------------------|----------|
| Page Name                         | Inner    |
| URL Alias                         | inner    |
| Theme                             | inner +  |
| <title> tag</title>               |          |
| Meta Keywords                     |          |
| Meta<br>Description               |          |
| Required<br>Access                | Anyone   |
| Group Access                      |          |
| Home Page                         | •        |
| Disable<br>Analytics<br>Edit Page |          |

Page Name = Change/Add Page Name
URL Alias = What appears in the search plane
<title> tag = What appears on the window tab on the browser
Meta Keywords = Helps with SEO
Meta Description = not SEO, Snippet of text that appears under URL in a Google search

Reminders:

\*\*Ignore everything below Meta Description\*\* \*\*Remember to Click Edit Page to save changes\*\*

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## Creating a New Page: \*\* DO NOT SELECT Add New Page\*\*

#### Only clone interior pages

Cloning pages with modules (blog page) breaks them.

1. Go to Inner page



2. Click Clone This Page

| Content | Add New Page     Site Hierarchy     Edit This Page |
|---------|--|
| 题 Pages | Delete This Page                                   |
|         | Delete This Fage                                   |
|         | <ul> <li><u>Clone This Page</u></li> </ul>         |
| Users   | <ul> <li>Bulk Add Pages</li> </ul>                 |
|         |  |

## 3. Window appears

| Clone Page    | <b>X</b> |
|---------------|----------|
| New Page Name |          |
| Clone Page    |          |
|               |          |
|               |          |
|               |          |

- 4. Add page name
- 5. Tab out of window
- 6. Click "Clone Page"
- 7. Create internal links to this new page where desired
  - a. Reference training Document 1 if you need help

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## ADDING A PAGE TO THE NAVIGATION



1. Content / Edit Content

\*\* Click on the Navigation bar, but do not click on a link\*\* \*\*Your Site Hierarchy will appear\*\*

| Site Heirarchy                        | 2 |
|---------------------------------------|---|
| A      Suy Doors      Set      Dulink |   |
| ← ♥ How to DIY 😂 Dunlink              |   |
| △                                     |   |
| ← ⊽ Finishing 🈂 Dunlink               |   |
| △▽ Who We Are 😂 🖓 Dunlink             |   |
| ← ♥ Our Craftmanship 😂 🖓 🕑 Unlink     |   |
| ← Practice 😂 C Unlink                 |   |
| △▽ Contact Us 🍀 🗘 ▷ Unlink            |   |
| Add Top Level Item                    |   |

## **ICON KEY:**

- Up & Down Arrows = adjust order
- **Red X** = Deletes from navigation only (not from Site)
- **Green + =** Adding a Sub-navigation
- **Side Arrow =** Hides or Shows pages within Navigation

| 🛆 🤝 Buy Doors 😂 🖓 🕞 Unlink  |   |
|-----------------------------|---|
| ← マ How to DIY 😂 🖓 🏱 Unlink | - |

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# ADDING A PAGE TO THE NAVIGATION cont'd

- 2. Select Heading your adding a sub navigation to (the lighter gray area)
- 3. Select desired page from List on Right
- 4. Click Add (It will now appear in the darker gray area)

\*\* You DO NOT NEED TO FILL OUT Name & URL\*\*

| >▼ Buy Doors 😂 P Unlink   | Select pages   |
|---|--|
| How to DIY ♀♀ ▷ Unlink  | Home<br>Inner<br>test<br>* Log In/Out                                  |
| Who We Are      Solution     Description     Control Control     Contro     Control     Control     Control     Control |  |
| ▲ ▼ Contact Us 築 ↓ ▷ Unlink<br>d Top Level Item   |  |
|   | (hold down CTRL to select multiple items)<br><b>Or add a menu item</b> |
|   | Name<br>URL<br>Add   |
|   |  |
|   |  |
|   |  |
| Silaning  | 1  |

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#### **Adding Video**

Adding a link to a video is the same as creating any other link on your site.



- 1. Content>edit content
- 2. Click content box you are adding link to (stripped boxed area)
- 3. In editing window: Highlight text you want to link
- 4. Clink Link Icon (on the toolbar)

| Edit Content                          | X   |
|---------------------------------------|---|
|                                       | Options<br>Content<br>CSS<br>Javascript<br>Display Settings |
| Styles • Normal • Font • Size • A• A• | Authors<br>HTML Settings                                    |

6. Link box appears, copy and past url of the video

| Link X                    |  |
|---------------------------|--|
| Link Info Target Advanced |  |
| Link Type<br>URL ¢        |  |
| Protocol URL              |  |
| Browse Server             |  |
|                           |  |
|                           |  |
|                           |  |
| Cancel                    |  |

7. Click target tab and select New Window (when finished click OK)

| Link Info     Target       Advanced       Target       ✓ cnot set> <frame/> <popup window="">       New Window (_blank)       Topmost Window (_self)       Parent Window (_parent)</popup> | Link                      |        | ×  |  |
|--|---------------------------|--------|----|--|
| Target<br>✓ <not set=""><br/><frame/><br/><popup window=""><br/>New Window (_blank)<br/>Topmost Window (_top)<br/>Same Window (_self)<br/>Parent Window (_parent)</popup></not>            | Link Info Target Advanced |        |    |  |
| <pre><frame/> <frame/> <pre> <pre> <pre> </pre> </pre> <pre> New Window (_blank) Topmost Window (_cop) Same Window (_self) Parent Window (_parent) </pre></pre></pre>                      | Target                    |        |    |  |
| Apopup window>     Apopup window>     New Window (_blank)     Topmost Window (_self)     Same Window (_self)     Parent Window (_parent)   | <frame/>                  |        |    |  |
| New Window (_blank)<br>Topmost Window (_seif)<br>Same Window (_seif)<br>Parent Window (_parent)  | <popup window=""></popup> |        |    |  |
| Topmost Window (_top)<br>Same Window (_self)<br>Parent Window (_parent)  | New Window (_blank)       |        |    |  |
| Same Window (_self) Parent Window (_parent)  | Topmost Window (_top)     |        |    |  |
| Parent Window (_parent)  | Same Window (_self)       |        |    |  |
|  | Parent Window (_parent)   |        |    |  |
|  |                           |        |    |  |
|  |                           |        |    |  |
|  |                           |        |    |  |
|  |                           | Cancel | ОК |  |

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## Don't Forget

You can always go to <u>http://pico-cms.com/user-manual</u> with questions or if you need guidance.

• It offers tutorials & Frequently Asked Questions



## You can Get there right from PICO:



#### ALSO

Use <a href="http://support.sisarina.com">http://support.sisarina.com</a> if you need submit a ticket for help.
\*\* Directly connects you to our developer \*\*
\*\*Provides time stamps showing when a project is being worked on\*\*

| SUPPORT SYSTEM                      |
|-------------------------------------|
|                                     |
| Domain (example.com)                |
| PIN                                 |
| LOG IN                              |
| Need an account?   Forgot your PIN? |

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