OXIEM

Marketing Technology

O2 CMS User's Manual

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Chapter

1

Getting Started

This section will introduce how to log into your website and start editing content.

I n order to make changes to your website you must first log in. Once logged in you will be able to make quick edits on each page, and you will have access to the **Management Toolbar** where you can make more in-depth changes.

How to Log in:

1. In your web browser's address bar, type **"/login.html"** after your site's domain name.
   For example: **http://www.hillikerymca.org/login.html.**
2. At the Login page, type in your **User Name**.

3. Enter your **Password**
4. Left click **Login**.

You will be redirected to a Welcome page.

NOTE:

If you'd like to go directly to the Administrative Section, type "o2" after your site's domain and login there.

Editing your Account Details:

1. At the Welcome page, click the "Edit Account Details link.
2. At the Edit Account page, you can change your **User Name, Password, First Name, Last Name,** and **Email** adddress. Please be sure that your Email address is valid.
   If you forget your password, it will be sent to this email address.

Welcome

+ Edit Account Details

The Management Toolbar:

Once you are logged in you'll notice the **Management Toolbar** at the top of the page. This toolbar only appears when you are logged in and viewing a page where you have permission to edit content.
.
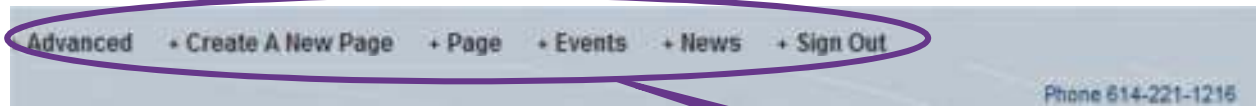
We will cover each option in the **Management Toolbar** in a later secti[on]

- ➢ For more information on the +**Page** tab go to pg. 13
- ➢ For more information on the +**Events** tab go to pg. 12
- ➢ For more information on the +**News** tab go to pg. 11
- ➢ For more information on the +**Advanced** tab go to pg. 15

Depending upon the exact configuration of your site, you may see more or fewer tabs on the **Management Toolbar.**

Remember to click the +**Sign Out** tab when you are finished making changes.

Chapter

2

"Front End" Editing

O nce you are logged in, you have access to make edits to your site. The O2 CMS allows you to make many edits from the "front end" of your site. The "front end" refers to all the pages of your website that can be viewed by anyone. The "back end" or **Administrative Section** is accessed through the **Advanced** tab of the **Management Toolbar.** The "back end" is the administrative area that can only be accessed by those who have user accounts with the right permissions. Many routine updates and edits can be performed through the "front end," including, editing text, adding links and adding images.

Editing In Place

This website employs an **Edit in Place (EIP)** system for users to make quick and easy content changes. **Edit in Place** means that you can make changes to text, images, etc. right where they live on the site. The majority of the elements of your website can be edited in this way. There are exceptions however. As a general rule, anything that is part of the primary design or main navigation of the site cannot be edited in place. If the element is part of a page's unique content, it can.

> **Right Click on the text you want to change.**

Editing Text:

1. To begin editing, go to a page you would like to edit by either entering the URL or navigating to it through the links on the site.
2. To edit any of the text simply right click where you want to make the change.

    WE HELP SCHOOLS BUY MORE FOR LESS

    As you can see, a small text editor will open containing the segment of text you clicked on.

    We Help Schools Buy [...]re for Less
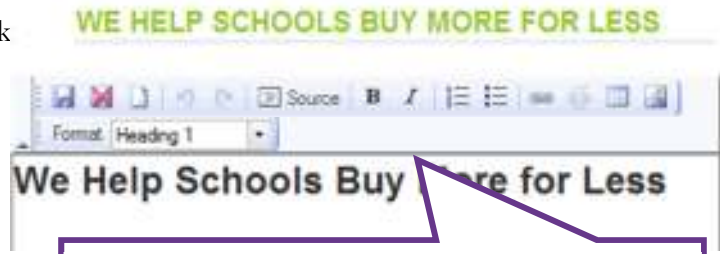
> **Use these tools to format the text as desired. See the list on the next page for the function of each tool.**

3. Place your cursor, and add, edit, or delete text as necessary.
4. Use the tools to format the text.
5. Click the Save button 🖫 to keep any changes you have made. Click the Cancel button ✖ to reject any changes you have made.

- "New Page" – erases all text so that you can start from scratch.

- "Undo" and "Redo"

- "Bold," "Italic," "Numbered List," "Bulleted List"

- "Insert Link" and "Remove Link"

- "Insert/Edit Table"

- "Insert/Edit Image"

Format Normal - The "Format" dropdown lets you change the style of the text
   Normal – used for regular paragraph text
   Heading 1 – used for the main title of the page
   Heading 2 – used as a subtitle to the main title
   Heading 3 – used as a heading for individual paragraphs
   Heading 4, 5,6… - rarely used, sometimes for subsection headings

NOTE:

If you are using a Word document to add content to your page, **DO NOT** copy and paste directly from Word into the editor. First, paste into **Notepad** (or some other plain text editor). Then copy from Notepad. Finally, paste into the editor. This will take care of any formatting problems that occur when pasting directly from word processing software.

Creating and Editing Links:

1. Right click on the segment of text where you want to place or edit a link.
2. Highlight the text where you want the link to be, and then click the **Insert/Edit Link** button.

   The Link dialogue window will appear. Essentially, there are 5 types of links: **Internal**, **External**, **E-mail**, **Document**, and **Anchor**.

Internal Link:

3A. An **Internal link** directs visitors to another page within your site's domain. To make one, simply copy and paste or type the appropriate web address into the URL field.
Alternatively, you can click Browse Server , which will open a new pop-up window.
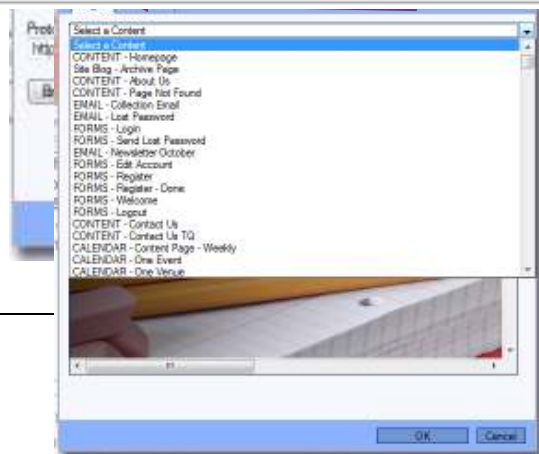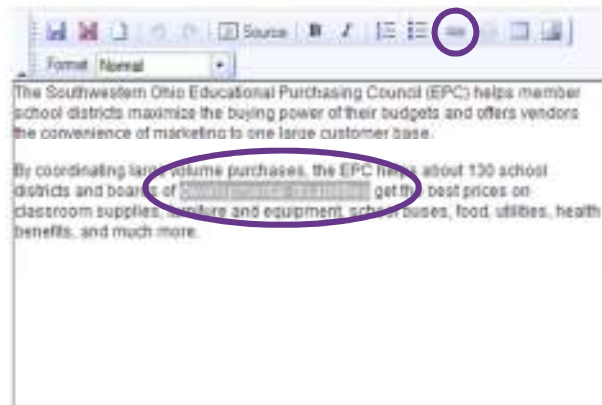
From the drop down menu under **Pages** tab of the **Link Dialog** window you can manually select any of the pages on the site.

4A. Either way, click **OK** and then the Save button ⊟ to create your new link.

External Link:

3B. An **External link** directs visitors to a web page outside of your site's domain. For these, after entering the web address into the URL field, click the **Target** tab.

4B. Then select "**New Window (_blank)**" from the drop down menu. This will make the link open up in a new browser window or browser tab so that site visitors don't inadvertently navigate away from your site.

5B. When finished, click **OK** and then the Save button ⊟ to create your new link.

Email Link:

3C. An **E-mail link** is used to open the new message window of a site visitor's mail client. To create one, use the drop down menu to change the "**Link Type**" to "**E-Mail**."

4C. Enter the address the message should go to, as well as the message's subject, and body text. The Message Subject and Message Body are optional fields.

5C. When finished, click **OK** and then the Save button ⊟ to create your new link.
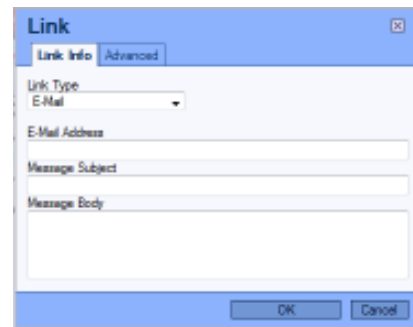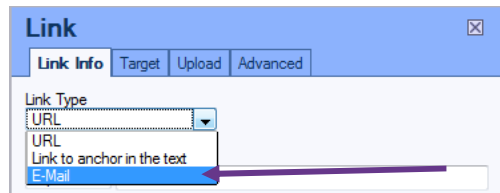
Document Link:

3D. Create a **Document link** if you want to give visitors access to a PDF of Word file. To link to a document, click **Browse Server**, and then click the **Documents** tab.

4D. Select the appropriate document listed in the drop down menu, and then click **OK**.

5D. If the document you need does not appear in the list that means it has not yet been uploaded to the server. You will need to upload it first. To do so, click the **Upload** tab.

6D. Click <u>Browse...</u> .
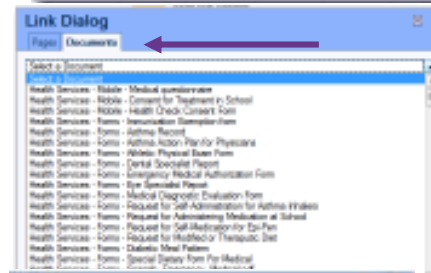
7D. A window will open up where you can select the appropriate file from your hard drive.

**8D.** Next, click <u>Send it to the Server</u>; wait for the confirmation message, and then click <u>OK</u>.

9D. Just like an **external link**, you should also go to the <u>Target</u> tab and set the target to "**New Window (_blank)**".

NOTE: Anchor Links cannot be created using **Edit in Place.** They must be created using the larger toolset which is a part of the **Collection Editor.** See the second half of this chapter for more details.

Adding and Editing Tables:

1. Right click on the segment of text where you want to place or edit a table.
2. Place your cursor where you want to place the table.
3. Click the "**Insert/Edit Table**" button .
4. Use the **Table Properties** window that appears, to define the starting size and look of the table.
5. Click <u>OK</u> .
6. Now that the table is placed on the page, you can add text to each of its cells.
7. To further customize the table, right click on it to open the contextual menu. Here you can delete the table or add and delete Columns, Rows, and Cells. Under the Cell submenu there is also a link to open up the "**Cell Properties"** window.
8. Use the fields in the "**Cell Properties**" to customize individual cells, including editing width, height, text alignment, background color, etc.
9. Click <u>OK</u> .
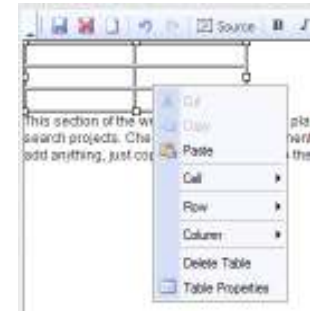
Adding and Editing Images:

1. Right click on the segment of text where you want to place the picture.
2. Place your cursor within the text about where you want to image to be.
3. Click the "**Insert/Edit Image**" button .
4. Click <u>Browse Server</u> to select an image that has already been uploaded.

5. The **File Dialog** will open. Select the appropriate image by clicking on the links to the left. This will provide a preview of each picture.
6. Click <u>OK</u> .

If the image you need does not appear in the **File Dialogue** window that means it has not yet been uploaded to the server. You will need to upload it first.

7. To do so, click the [Upload] tab.
8. Then click [Browse...].
9. In the window that opens, select the appropriate file from your hard drive and click "**Open."**
10. Next, enter and **Image Name**, select an **Image Type.**
11. Click [Send it to the Server] and wait for the confirmation message,
12. Click [OK].

Once an image has been placed on the page, you can right click on it to bring up the **Image Properties** window again.

From here you can change a number of the image's characteristics. You can add a black **Border** around the image, and also change the amount of horizontal blank space (**HSpace**) and vertical blank space (**VSpace**) around the image. These fields read values as number of pixels). From the **Align** drop down menu, you can change how the image lines up with the text. (Using the **Width** and **Height** fields or dragging and dropping the corners of the image can lead to distortion and excessive pixilation. We recommend against changing the size of the image this way.)
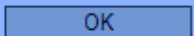
To Resize or Crop and image:
1. Click [Edit Image] and the **Edit Image Dialog** will open up
2. Enter a name for the picture under **New Filename Details**
3. To resize, click the check box next to **Preserve ration on resize.**
4. Enter a new value in the **Width** or **Height** field**.**
5. Click "**go**."
6. To crop, click "**Start Crop.**" A small white box will appear on the image.
7. Enter values into the **Width** and **Height** and click "**go**" to change the size of the crop.
8. Drag the white box to where you want the crop to take place.
9. Click "**Apply Crop**"
10. Click [OK].

Placing a link on the image:

1. Click on the [Link] tab.
2. Type in or copy/paste the appropriate web address into the **URL** field.
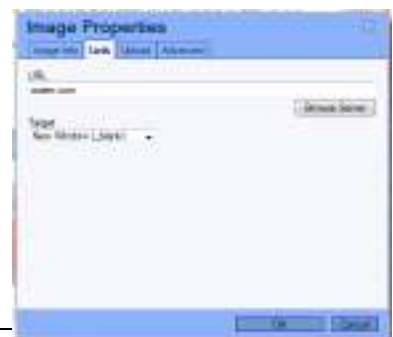
3. If you are creating an external link, set the **Target** to "New Window (_blank)."
4. Click [OK].

The Collection Editor

Several features on the site can be easily edited from the "front end," but not edited in place. These elements can be edited using the **Collection Editor**. However, as with **Edit in Place**, the editing process is often initiated by right clicking on the item you want to change. In some cases you can also open the **Collection Editor** using one of the links in the **Management Toolbar.** The elements that are edited with the **Collection Editor** include **News Articles**, **Calendar Events**, etc. The exact items that can be edited with the **Collection Editor** will vary depending upon the design of your site. When in doubt, try right clicking on the item you want to change. More often than not a window will open so that you can make the desired change.

NOTE: Important Terms

<u>Collection:</u> The website is created by accessing data and displaying information from a database. The database is organized into **collections**. Each **collection** is composed of one distinct kind of data. For instance, there are separate **collections** for Images, Documents, Content, News Articles, Calendar events, etc.

<u>Row</u>: Each item within a **collection** is called a **row**. For instance, each News Article constitutes one **row** within the News **collection.**

Edit this Page's Content:

Sometimes you'll want to edit the whole page at once rather than individual pieces using **Edit in Place.** This might occur if you want to more extensively restructure the layout of the page. You might also find that the tool set provided with the **Edit in Place** editor doesn't contain the necessary tool for an edit you'd like to make. You can solve both problems by opening up the **Collection Editor.**

1. Let your cursor hover over the **+Page** tab of the **Management Toolbar.**
2. Click **Edit This Page's Content**
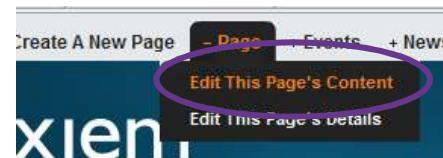
This opens the **Collection Editor** for the **Content Profile** collection. The Content Profile collection controls nearly all visual content for each page. There are 3 tabs as part of the **Collection Editor.** The **Row Selector** tab allows you to choose a different row to
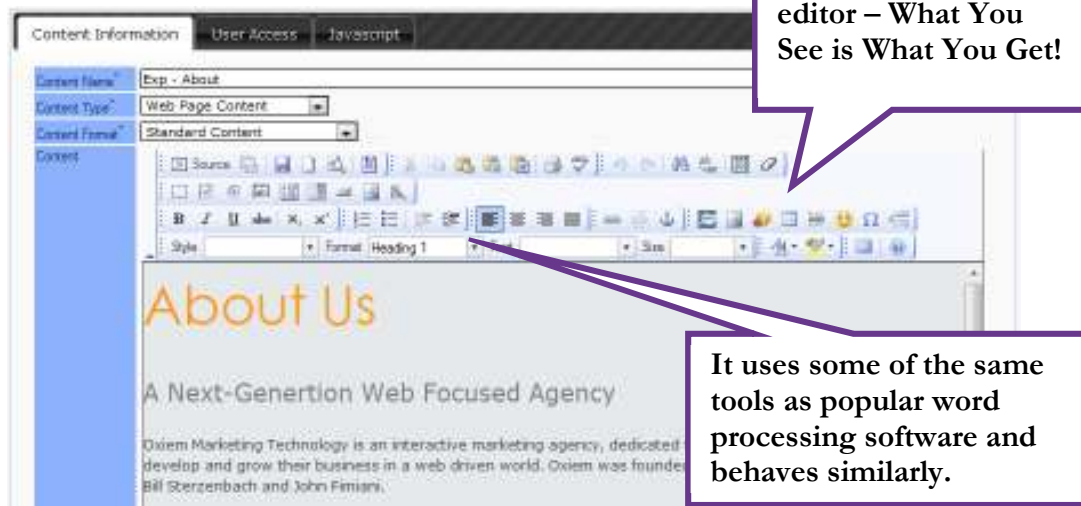
work with. The **Filter Rows** tab allows you to reduce the size of the list of rows by filtering by any of the fields in the collection. The **Row Editor** tab (which you are automatically directed to) allows you to make changes to the row.

3. Edit each field as necessary.

The **Content Name** field is used solely for organizational purposes. The **Content Type** and **Content Format** fields are set up during the initial development of the site and rarely need to be changed afterward.

The **Content** field contains a **WYSIWYG** (What You See Is What You Get) editor where you can make changes to the text and images on the page.

This is a WYSIWYG editor – What You See is What You Get!

It uses some of the same tools as popular word processing software and behaves similarly.

This editor contains many more tools than the **Edit in Place** editor. Most of the additions will behave very much like similar tools behave in popular word processing software. Many of the other additional tools are very rarely used.

For more information on this open source editor see:

http://docs.cksource.com/FCKeditor_2.x/Users_Guide

4. When you are done editing, left click the Save Row button to keep your changes.

Tips and Warnings:

- *Copying from Microsoft Word* - If you are using a Word document to add content to your page, **DO NOT** copy and paste directly from Word into the **WYSIWYG** editor. First, paste into the **Content Notes** field near the bottom. Then copy from the **Content Notes** box. Finally, paste into the **WYSIWYG** editor. This will take care of any formatting problems that occur when pasting directly from a word processor. You can also use the **Content Notes** box as a filtering tool.

- ***Avoid Deleting Smarty Codes – *** *Smarty Codes* (Pictured) are icons that represent lines of code on the page. The lines of code are often used to bring in other visual elements to the page. For instance, *Smarty Codes* are used to add main and sub-navigation links to the page. They are also sometimes used to add forms and adlets to pages.

Edit this Page's Details:

Letting your cursor hover over the **Page** tab opens a drop down menu with two options: **Edit this Page's Content**, and **Edit this Page's Details**. We just discussed the use of the **Edit the Page's Content** link. A "Page's Details" refers to some of the aspects of each page on your site that are present in the background. This includes defining the URL for a page and selecting which row of content will be seen on the page.
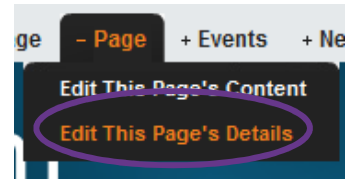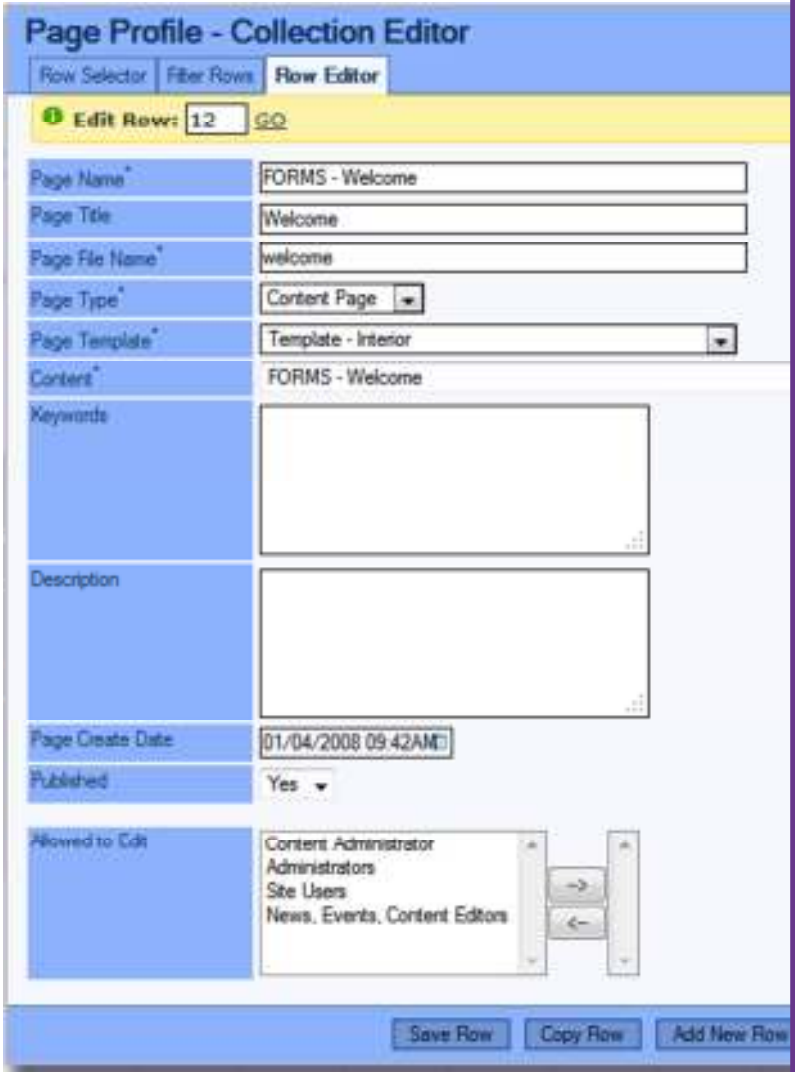
NOTE:

Every page on the website is really built from two separate pieces. On the one hand there is the page's **content**. The **content** is what a user actually sees on the page: the text, the images, the links, the forms, etc. On the other hand there are the page's **details**, the things that actually make the page accessible on the internet. Most importantly, page **details** include the page's URL address and what piece of **content** is associated with that web address.

To edit any of the page's details:

1. Let your cursor hover over the **Page** tab.

2. Click **Edit This Page's Details.** This opens the **Collection Editor** for the **Page Profile** collection and automatically directs you to the row editor tab. You will see the information for whichever page you were viewing.

3. Make changes to any of the fields as necessary (See below for descriptions of each field.)

4. Click **Save Row.**

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Page Profile - Collection Editor

Row Selector | Filter Rows | Row Editor

ⓘ Edit Row: 12 GO

Page Name*	FORMS - Welcome
Page Title	Welcome
Page File Name*	welcome
Page Type*	Content Page ▾
Page Template*	Template - Interior ▾
Content*	FORMS - Welcome
Keywords	
Description	
Page Create Date	01/04/2008 09:42AM
Published	Yes ▾
Allowed to Edit	Content Administrator / Administrators / Site Users / News, Events, Content Editors → ←

Save Row | Copy Row | Add New Row

Page Name – used for sorting; it will not appear to users, but should be accurate

Page Title – will appear to site users in the heading of their browsers

Page File Name – will be used to create the URL.

*NOTE: this field cannot have any spaces.

URL for that page will be: **http://"domain name"/test-page.html**

You must type in everything you want to appear in the web address after ".com/" except for ".html"

Page Type – this field is used during initial site development; you will probably never need to adjust it. Most pages are set to "Content Page."

Page Template – this field is used during initial site development; you will probably never need to adjust it. Most pages are set to "Main Template"

Content – this is the field that selects which content row will be seen at this page

Keywords and **Description** – these fields are sometimes used by search engines to help generate results. Keyword is for a list of comma separated terms. Description is for a short sentence or two.

Page Create Date – generates automatically

Published – set to "Yes"

Allowed to Edit – lets you grant access to edit this row to certain user groups. If left blank, only top-level administrators will have access

News Articles

The **News Module** allows you to add and edit up to date stories about your organization. The exact implementation of the module varies from site to site, but most sites include "**Recent News**" and "**News Archives**" pages as well as a feed of the most recent news stories to the home page. Adding a new article is quite easy.

Adding a new article:

1. Let your cursor hover over the **News** tab of the **Management Toolbar**. Click **Add News**.
   This opens the **Collection Editor** for the **News Articles** collection and automatically directs you to the `Row Editor` tab.
2. You will see a series of blank fields. Add in the appropriate information for this news article.
3. Click the **Add Row** button.
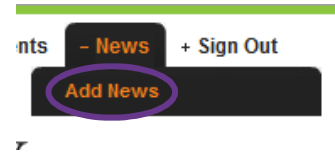
The chart below will describe the function of each field.

Date Start – the day and time when the news article will begin to be published on the site.

Date End – the date and time when the article will be moved into the news archive

Headline – the main title of the article

Subhead – a subtitle (optional)

Abstract – a short introduction to the story (optional)

Article Content – the main text of the story

Image – Where this appears depends on the design of the site. Usually, it will appear in the upper right hand corner of the article

Small Image – Where this appears depends on the design of the site. Often it appears on the homepage news feed or the Recent News page. Sometimes it's not used at all.

**Article URL** – This field is usually non-functional

Always Alive Article – This field is usually non-functional

News Categories – You must place each article into a category for it to display on the site.

Allowed to Edit – by selecting a user group you grant permission to edit this news article to members of that group

Editing a news article:

1. Navigate to the news article you'd like to edit.
2. Let your cursor hover over the **News** tab of the **Management Toolbar.** Click **Edit News.** This opens the **Collection Editor** for the **News Articles** collection and automatically directs you to the `Row Editor` tab.
3. You will see all of the fields filled in with the details of the article. Edit any of the fields as necessary.
4. Click `Save Row` and then `OK` to keep the changes you've made.
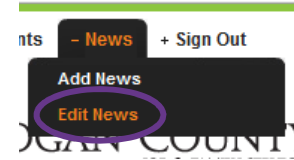
   NOTE: If you want to delete the news article all together, click `Delete Row`.

Calendar Events

The **Events Module** allows you to add and edit calendar events for your web site. The exact implementation of the module varies from site to site, but most sites include "**Calendar**" and page with monthly, weekly, and daily views as well as a feed of upcoming events to the home page. Adding a calendar event is quite easy.

Adding an event:

1. Let your cursor hover over the **Events** tab of the **Management Toolbar**. Click **Add Event**. This opens the **Collection Editor** for the **Events** collection and automatically directs you to the `Row Editor` tab.
2. You'll see two tabs: **Tools** and **Advanced Tools**, as well as a series of blank fields. Both tabs allow you to precisely define your event. Add information into the fields as appropriate. See below for a description of the function of each field.
3. Click the **Add Row** button.
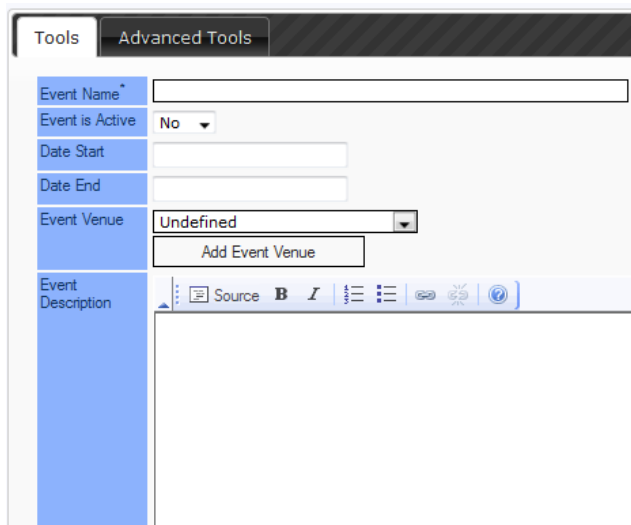
Tools Tab:

Event Name* - the title for the event

Event is Active – set to "Yes" for article to display
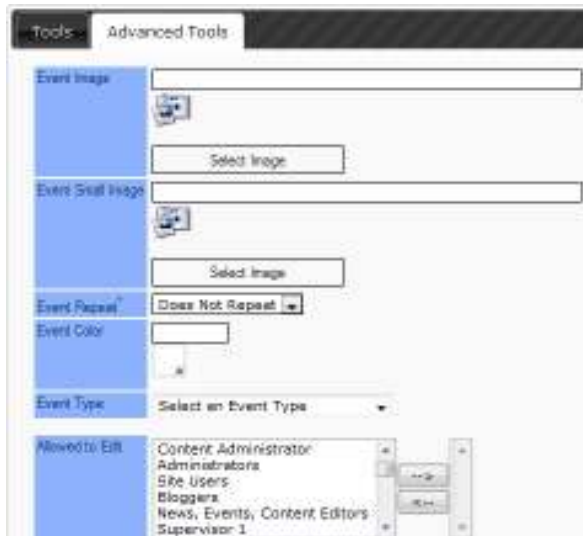
Date Start – the start date and time for the event.

Date End – the end date and time for the event

Event Venue – select where the event will take place. If you need to, click the **Add Event Venue** button to add a location.

Event Description – use this basic text editor to add a description of the event.

Advanced Tools Tab:

Event Image - Where this appears depends on the design of the site. Usually, it will appear in the upper right hand corner of the event description page

Event Small Image – Where this appears depends on the design of the site. Often it appears on the homepage events feed. Sometimes it's not used at all.

Event Repeat – You can create events that repeat Daily, Weekly, Monthly, or Yearly. Each selection will present you with more options to exactly define the repeating event.

Event Color – select the color of the text listing on the calendar pages

Event Type – select a type to associate with the event. More types can be added from the Dashboard

Allowed to Edit – by selecting a user group you grant permission to edit this news article

Editing a calendar event:

1. Navigate to the calendar page.
2. Click on the event you'd like to edit.
   This opens the **Collection Editor** for the **Events** collection and automatically directs you to the ⸢Row Editor⸣ tab.
3. You'll see a series of fields filled with the details of the event. Edit any of the fields as necessary.
4. Click ⸢Save Row⸣ and then ⸢OK⸣ to keep the changes you've made.

NOTE: If you want to delete the event all together, click ⸢Delete Row⸣.

Creating a New Page

With our "Create a New Page" wizard, adding a brand new page to the site is very easy.

1. Navigate to the page you'd like to use as a template for this new page. It is best to use a page that looks very much like your new page and lives in the same section.
2. Click **Create A New Page** in the **Management Toolbar.**
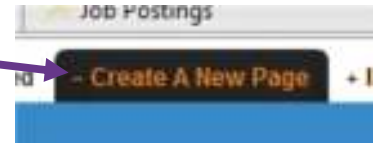
The **Create A New Page** window will open. There are three tabs. To create a new page and place it on the site you need to use the three tabs in order, from left to right.

3. Select a page to copy. From the drop down menu select a page that closely resembles what your new page will eventually look like. (The dropdown menu will default to which ever page you were looking at.)

4. Click **Section to Place Page** .
5. Select which menu item this new page should fall under.

This is a menu tree representing the main and sub-navigation links on the website. Click on the menu heading under which you'd like your new page to live.

6. Click **Page Details** .
7. Edit the new page's details.

Page Name – what the system will call the page and what this page will be called in the site's menu

URL – enter the web address for the page. Do not type in the domain name, just everything that should appear after.
It should reflect the section the page will live in.

SEO Description and **SEO Keywords** – text entered here is sometimes used by search engines to generate results.

Click **OK** .
Once you click **OK**. The new page will be created and you will be redirected to it.

8. Edit the contents of the page.

Now that the page has been created and placed in the site's menu structure, all you need to do is edit the content of the page using the **Edit in Place** system or by clicking the **Edit this Page's Content** button and using the **WYSIWYG** editor
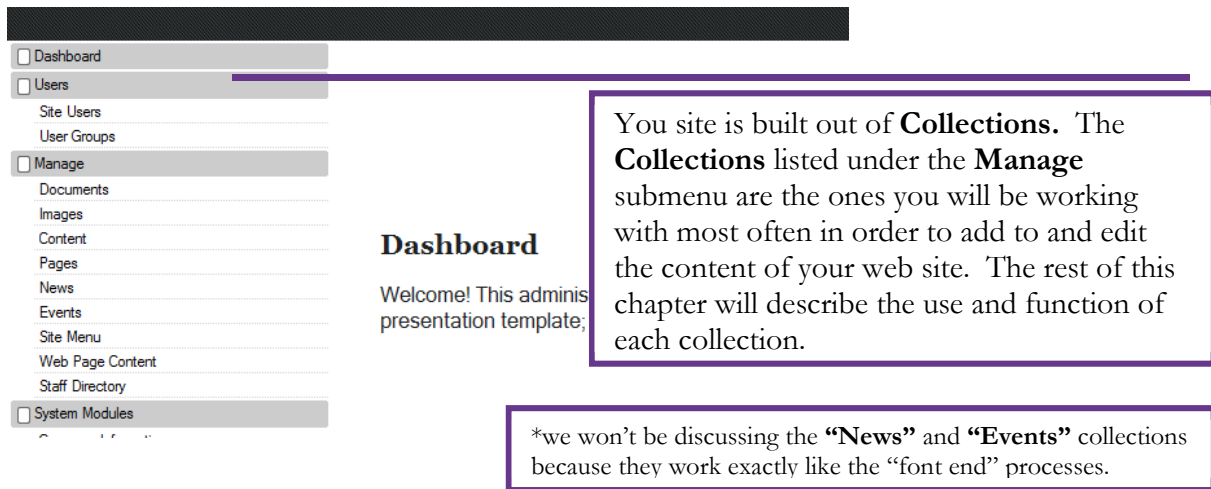

A Smarter Approach to Web Development

People expect much more from websites than they did five or ten years ago. Sites that act as online brochures are on the way out, making way for online toolkits that share news, interact with audiences and host rich media.

Oxiem specializes in creating high-performing, elegantly designed, branded and intuitive site solutions. Engaging the audience, measuring effectiveness and optimizing search engine traffic is seamless across all of the sites we build. From e-commerce, e-newsletters and e-marketing, we can incorporate any custom features and research your users' needs to create an engaging site interface and user experience.

Chapter

3

The Administrative Section

This section will discuss the function and use of the Admin Section of your site.

A nything you can do from the **"front end"** of your site (editing content, adding links, etc.) can be performed in the **Administrative section** or **"back end"** of your site. Several tasks must be performed in the **Administrative** section. This chapter will discuss both sets of tasks.
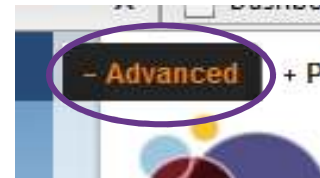
To access the **Administrative section** of your website click the link labeled **Advanced** on the **Management toolbar.** Alternatively, you can simply type **/o2** after your site's domain name into your browser's address bar. You will then be at the **Dashboard**.

You site is built out of **Collections.** The **Collections** listed under the **Manage** submenu are the ones you will be working with most often in order to add to and edit the content of your web site. The rest of this chapter will describe the use and function of each collection.

*we won't be discussing the **"News"** and **"Events"** collections because they work exactly like the "font end" processes.

NOTE: Important Terms

Collection: The website is created by accessing data and displaying information from a database. The database is organized into **collections**. Each **collection** is composed of one distinct kind of data. For instance, there are separate **collections** for Images, Documents, Content, News Articles, Calendar events, etc.

Row: Each item within a **collection** is called a **row**. For instance, each News Article constitutes one **row** within the **News collection.**

Users Collections:

The collections listed under the **Users menu** control your site's login accounts. We'll be looking at each collection in turn.

Site Users

Each row in this collection represents one user. If you need to add a new user simply fill in the appropriate fields and click **Add**. If you need edit an already existing user, click on the username in the **Row Selector**, edit the fields as needed, and click **Save**. See below for descriptions of each field.
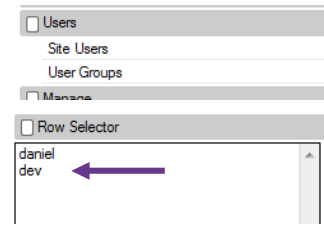
User Name* – the login name

Password* – type in the account's password

First Name, Last Name – the account holder's name.

Email* – the email address associated with the account – used to send forgotten passwords

Active – activate or disable the account.

User Create Date, User Last Login Date – both generate automatically

Receive Newsletter – usually non-functional

Allowed to View – select the User Groups in which you want to place this user

Allowed to Edit – by selecting a user group you grant permission to edit this user account to members of that group.

User Groups

Each row in this collection represents one group of users. Defining user groups is one step in the process of creating a tiered permission system for your site's users. If you need to add a new group simply fill in the appropriate fields and click **Add**. If you need edit an already existing group, click on the group name in the **Row Selector**, edit the fields as needed, and click **Save**. See the descriptions of each field.

Group Name* – give the group a title.

Group is Admin – if you select "Yes" members of the group will have all permissions.

Group Can Add – gives members of the group permission to add rows.

Group Can Edit – gives members of the group permission to edit rows.

Group Can Delete – gives members of the group permission to delete rows.

WelcomeContentID – selects which content the user group will see upon login.

Allowed to Edit – by selecting a user group you grant permission to edit this group to members of that group.

Collections in the Manage Menu:

The collections in the **Manage Menu** control many of the visible elements of the site. If you need to any work at all from the **Dashboard**, these are the collections you'll use most often.
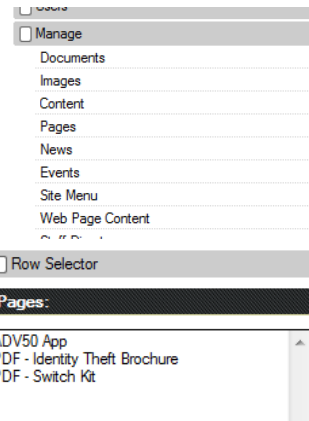
Documents:

Each row in the **Documents** collection represents one downloadable or viewable text file (Word, PDF, etc). If you need to add a new document simply fill in the appropriate fields and click **Add**. If you need to edit an already existing document, click on the document name in the **Row Selector**, edit the fields as needed, and click **Save.** See the descriptions of each field.
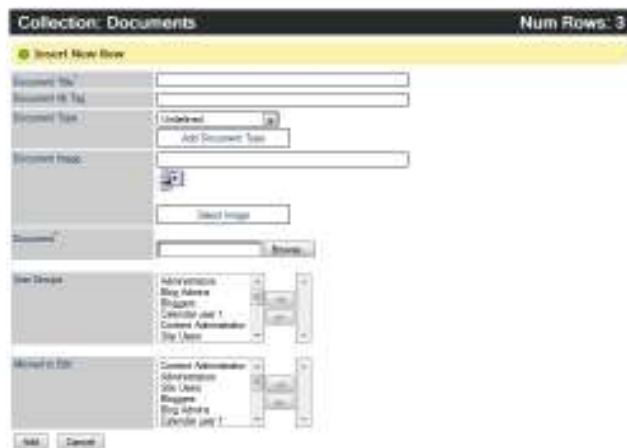
Document Title - a memorable name for the document

Document Alt Tag – allows you to add an alt attribute to the document

Document Type – select which type of document it is (almost always optional)

Document - Click "Browse…" to find and select the document on your hard drive.

User Groups (Allowed to View) – lets you password protect the document to any groups you select

Allowed to Edit – allows you to grant access to certain user groups to edit this document

NOTE:

To add a new row to a collection after you have already added one, you must first left click **ADD ROW** beneath the row selector box. This will bring up a new set of blank fields.

Images:

Each row in the **Images** collection represents one picture. If you need to add a new image simply fill in the appropriate fields and click **Add**. If you need to edit an already existing document, click on the image name in the **Row Selector**, edit the fields as needed, and click **Save.**

See the descriptions of each field.

Image Title – simply a name for the file

**Image Alt Tag** – allows you to add an alt attribute to the document

Image Category – place the image in a category (almost always optional)

**Image Path** - Click "Browse…" to find and select the image on your hard drive.

Allowed to Edit – allows you to grant access to certain user groups to edit this image

Content:

Each row in the **Content** collection represents one viewable web page element. If you need to add a new piece of content, it is not recommended to simply fill in the appropriate fields and click **Add**. Instead, select a piece of content to use as a template. Click **Copy Row** and then edit the copy you just made. Finally click **Save**. If you need to edit an already existing piece of content, click on the content name in the **Row Selector**, edit the fields as needed, and click **Save.**

☐ Manage
Documents
Images
Content
Pages
News
Events
Site Menu
Web Page Content
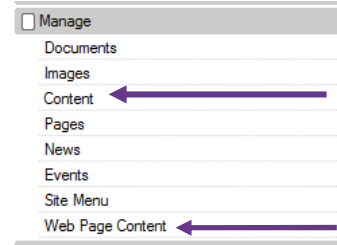
The tools you see in the Content Collection are identical to what you see when you click **Edit This Page's Content**. See pg 8 for more information.
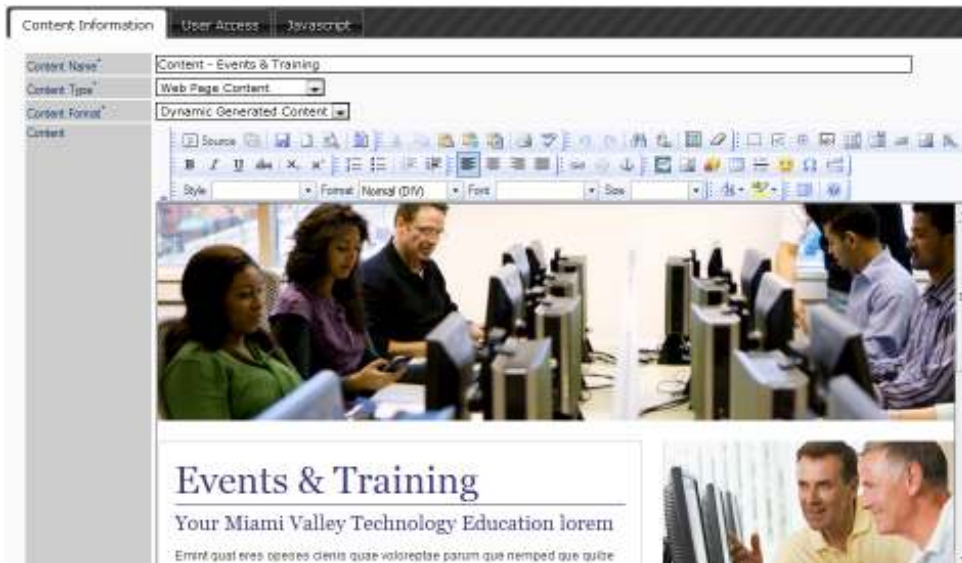
Pages:

Each row in the **Pages** collection represents one unique web page. If you need to add a new page, simply fill in the appropriate fields and click **Add**. If you need to edit the details of an already existing page, click on the page name in the **Row Selector**, edit the fields as needed, and click **Save.**

See the descriptions of each field.

Page Name – used for sorting in the Administrative section; it will not appear to users

Page Title – will appear to site users in the heading of their browsers

Page File Name –used to create the URL.

NOTE: **Page File Name** cannot have any spaces.

Example: **Page File Name =** test-page URL for that page will be: **http:// "domain name"/test-page.html**

You must type in everything you want to appear in the web address after ".com/" except for ".html"

Page Type – Set to **Content Page**

Page Template – Set to **Main Template**

Content – This is the field where you select which content will be associated with this URL address.

Keywords and **Description** – used for sorting, and search engine optimization; will not appear to users

**Page Create Date** – generated automatically

Published – set to "Yes." If set to "No" the page will return a "Page Not Found" error

Allowed to Edit – allows you to grant access to certain user groups to edit this page

Site Menu:

The **Site Menu** collection controls the main and sub navigation links on your site. Each row in this collection represents one link in that menu structure. If you need to add a new site menu link simply fill in the appropriate fields and click **Add**. If you need to edit an already existing link, click on the link name in the **Row Selector**, edit the fields as needed, and click **Save.**

See the descriptions of each field.
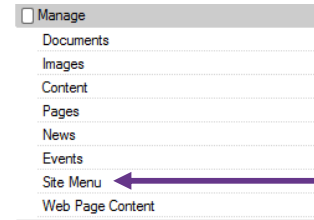
Menu Name – designates what the link will be called in the menu.

Menu Link – type in the URL of the page you want to link to. This is an Auto-Complete field so when you start typing the system will guess which page you're trying to link to.

Sort Order – a numerical value describing where you want the link listed. Lower numbers appear toward the beginning. Higher numbers appear toward the end

Show in Site Menu – set to **Yes**.

Hidden – set to **No**.

Open in New Window – set to **Yes** if making an external link.

Parent Menu – select from the drop down menu or the menu tree, the section under which you want your new link to live.

Allowed to Edit – allows you to grant access to certain user groups to edit this site menu link

Using Filters:

Filters are a great tool to very quickly find the specific row in a collection you want to work on.

1. Under the **Manage menu**, click the collection (ex. Images, Document, News, etc.) you would like to filter. We'll use the **Content** collection as an example.
2. Scroll to the bottom and click **Filter Data**.

This menu will open up.

3. Click **"Add Filter."**

4. In the **Select a Column** pull down menu, choose the column you want to filter by.

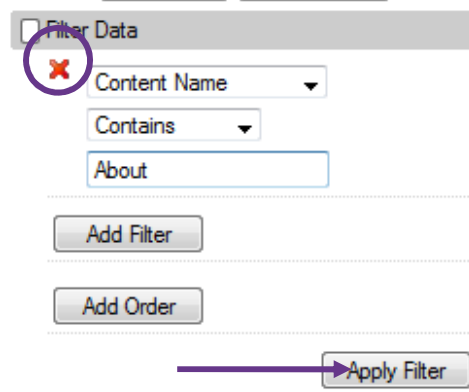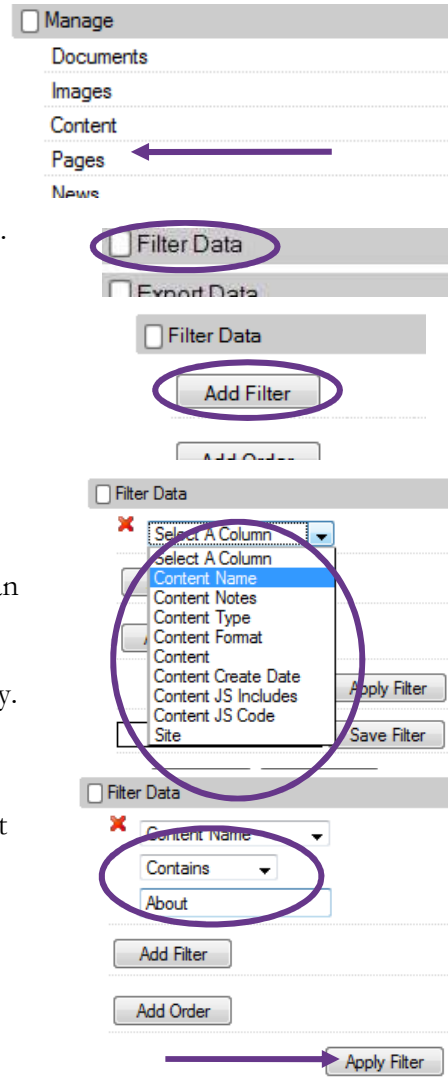5. Change **Equal** to **Contains** (unless you are entering an exact name).

6. Fill in the box below with the text you wish to filter by.

7. Click **Apply Filter.**

Finally, only the items in the **Collection** that have the text you filtered by will be visible in the **"Row Selector"** window.
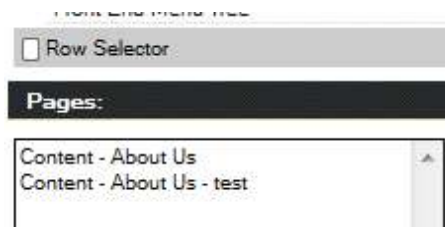
NOTE: To remove the filter, click the red X, and then click **Apply Filter.**

Exporting Collection Spreadsheets:

For some collections it may be helpful to export that information into an Excel spreadsheet. This process is possible for all collections but may be of less utility for some. Here are the steps in that process.

1. Navigate to the collection you want to export, by clicking on the link in the **Manage** menu.

2. Click **Export Data** under the **Row Selector**

3. Enter a **File Name**

4. Select a Column to **Order Result by.**

5. Choose an **Ascending** or **Descending** order.

6. Select whether or not to add headers to the exported columns.

7. Click **Add Column to Export** and select a column you want to include in the spreadsheet. Repeat until you've selected each desired column.

8. Click **Export to Excel**

9. Save the file.

Appendix A: Homepage Rotators

This feature **CAN** be edited with the Collection Editor from the front end of the site. Remember to right click on the item you want to change. Like everything else on the site, this feature can also be edited in the appropriate collection on the back end. See below for a description of each field. This collection creates and controls each large banner image that displays on the homepage. See below for a description of each field.

Picture Title – this text identifies the rotator and is not visible on the front end

Picture Subtitle – this is not utilized on your site

Picture – Click "Select Image" to choose a banner image (960 px × 368 px). The text is embedded in the photo

Picture Active – set to "Yes" or "No"

Picture Sort Order – a numerical value entered here controls the order of the rotation

Picture Link – enter a URL here to make the picture link to a page.

Allowed to Edit – allows you to grant access to certain user groups to edit each homepage rotator.