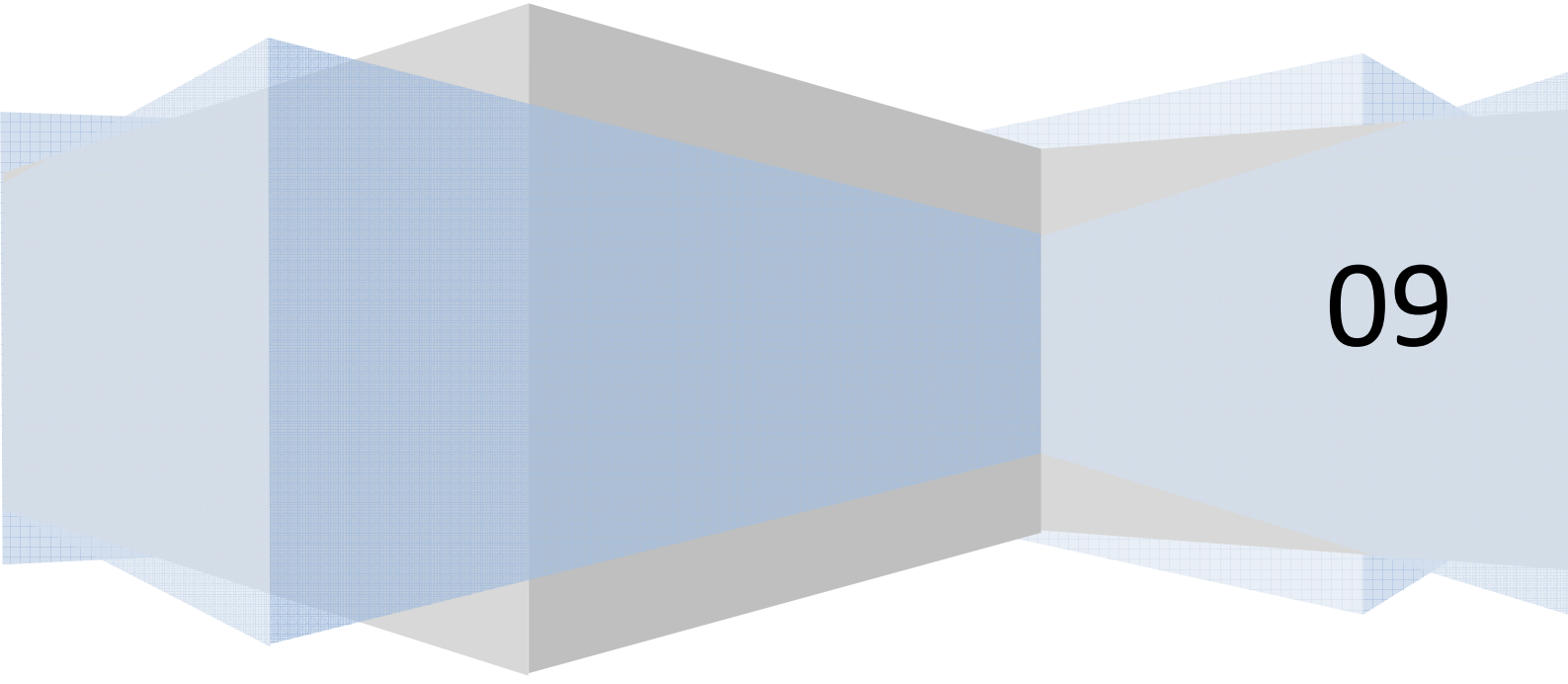
Whalley Websites

Website Builder - Getting Started Guide

Help Guide – Read this from cover to cover, it is all useful

Last updated 2011-06-13



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Content Management System Getting Started Guide

Introduction

Hello and welcome to your comprehensive Getting Started Guide. First of all you should know that only you can edit your website, as only you know your administrators username and password that enables the editing features. Visitors to your website can't change the text. You might think this is obvious, and well it is, but I just thought I'd mention it.

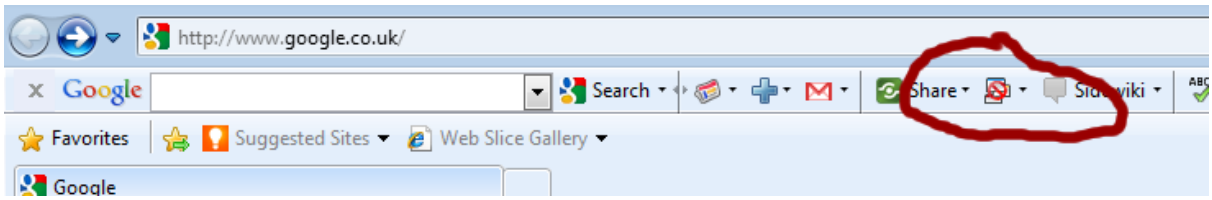
> The administrator's username and password puts you in God Mode. You can practically do anything you like, which is a double edged sword, meaning you can delete text and images as well as add them.

Terms used in this document

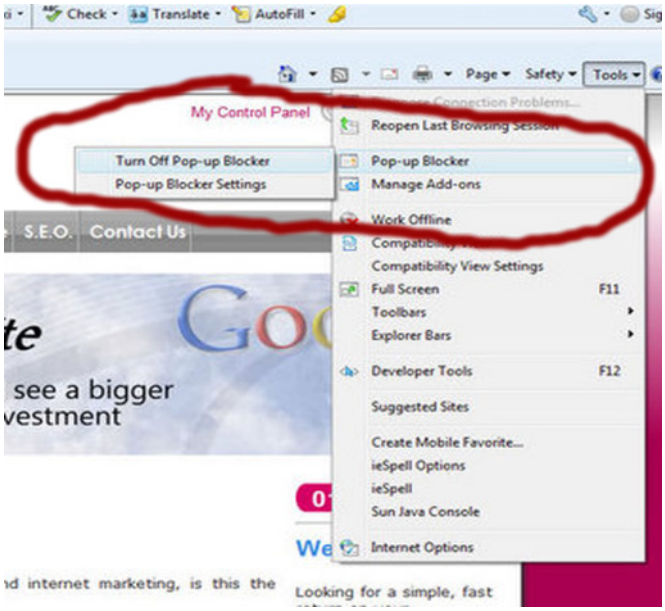
CMS – This stands for Content Management System. This is also known as the "Website Builder" or "Website Editor". It is the system you use to change the content of your website (pictures and text).

Turn off any popup blockers you may have

You should turn off any popup blockers you may have turned on in Internet Explorer.
If you have a Google popup blocker installed (it'll look similar to below), click the Popups Blocked/Okay button so it looks like below.



If you have the standard internet explorer popup blockers installed, then click on Tools-> Pop-up Blocker -> Turn off popup blocker.

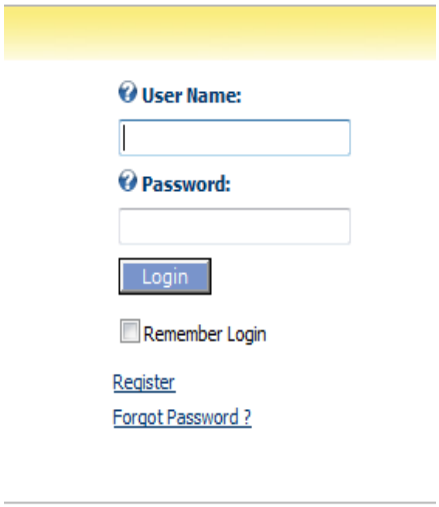


Logging In to your website

The first step is to get you logged in to your website so the website knows that you want to make changes. Navigate to your website using internet explorer. So go to your website address by typing it fully into the address bar of your internet explorer window (or by any other means).

Have a good look around because somewhere on your website there will be a link called 'Login'. When you find it click on it. If you can't find it call us and we'll help you find it.

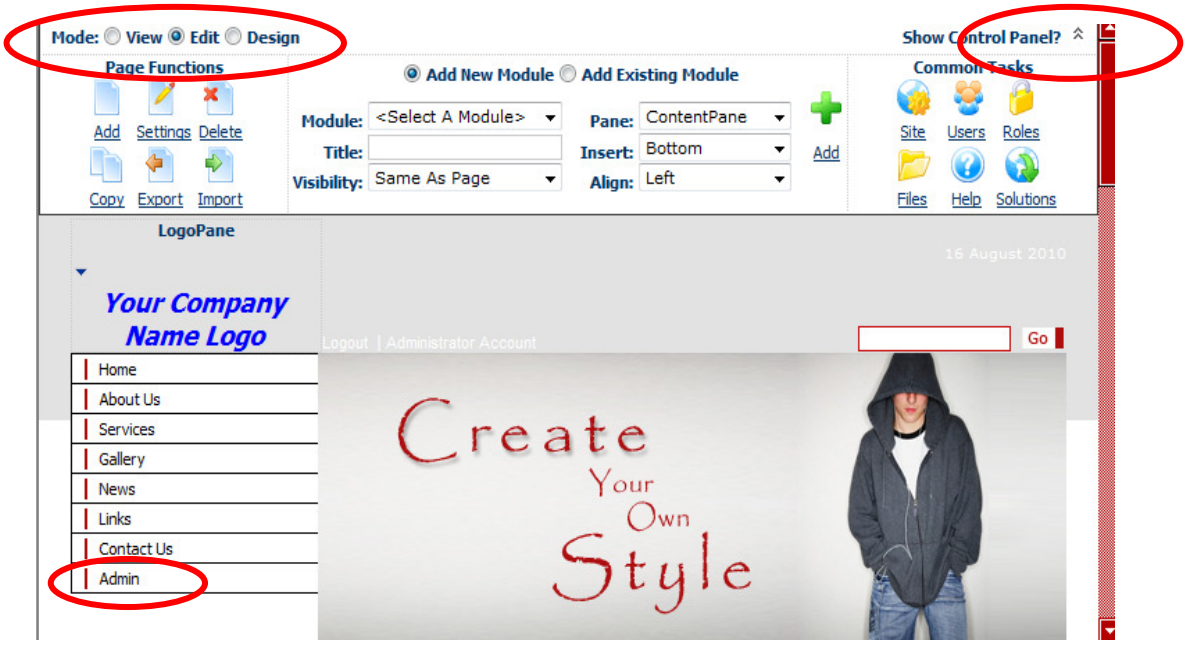
You will then be asked to enter your username and password (given to you by us).



And that's it. First step done. Easy? Of course it was.

A bit of theory

Ok so we're logged in now. It's time for a bit of theory about how the CMS works. Once you're logged in to your website I want you to notice that there are now a few extra things on the screen which allow you to make changes to the text, pictures, menu etc.



You will notice at the top of your website now that there is a massive control panel area stretching right across the screen above your websites banner picture. There's a lot of buttons on there and you can play with them later, but for now we will concentrate on only a few of them. (If you cannot see the control panel it's probably because the control panel is collapsed out of view, so there's a 'Show Control Panel' button at the top right for you to click if you want to display/hide the control panel.)

You will notice at the top left of the control panel, there are 3 modes for you to be in whilst making changes to the website – View, Edit, Design. Feel free to switch between them and observe what happens. We suggest you stay in the Edit Mode while working on your website, as it allows you to see the content of your website as you are working on it. But you might find the other modes useful as you progress.

On your menu area you will see a new additional 'admin' menu option. This is only displayed to you, the administrator. There are lots of options on this 'admin' menu, if you hover your mouse over it to display its menu options. But we will only play with the file explorer, 'pages' (sometimes called Tabs) and the site settings section later. The rest can be ignored and aren't too important for most simple websites.

You will also notice that the rest of your menu appears as normal. If you click on one of the menu options on your website's menu, it will still take you to that website page on your website. So if we wanted to make changes to the home page of your website, we would click on the 'home' menu option (assuming it is called home on yours, it is on ours), and we would see your home page come up, and from there we can make changes to it (exactly how is discussed later). I only want you to recognise that we can only the edit a page on our website, when we are looking at it. It seems obvious, but I thought I would mention it.

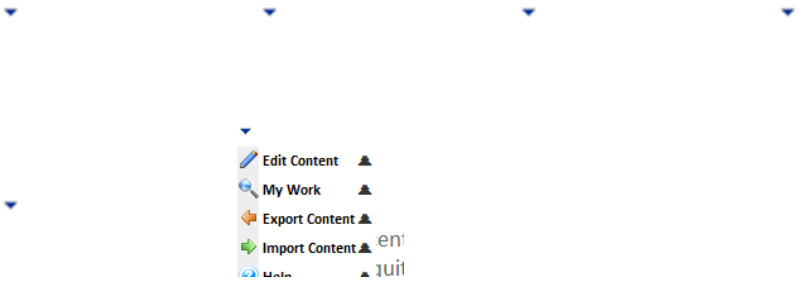
If you look at your website's home page area where all the text and pictures are about your business, you will see there are strange looking sections/segments that now appear, these are known as panes or Panels – typically these are called Logo Pane, Left Pane, Content Pane, Right Pane, and at the bottom – Bottom Pane. **If you cannot see your panes**, it's because you're not in Layout mode. Click on Layout mode in the top left of your control panel. Then go back to edit mode.

These are only visible to you, the administrator. They allow you to tell the Website Editor where you want to place items (such as textboxes for placing pictures and text into) on to your web page. So if you wanted to place a new section of text onto your web page on the left hand side, you will tell the CMS to place it into the Left Pane. And so on for the rightpane, bottompane etc. and slowly but surely your website can be built to exactly how you want it as you place more texts and pictures on to your web page in the different panes, some on the right, some in the middle (which is called the content pane), some at the top, and so on. It is really easy, but we'll get on to that later. So for now just accept this and be aware these extra things exist.

And that is it for the theory, for now. ☺

Textboxes – Textboxes – Textboxes

What is a module action menu?? You will see on your website lots of these arrows shown below. Every module on your page has one. When you hover over it with your mouse the menu that appears is called the module action menu. If it is a textbox type module then you'll see the 'edit content' or 'edit text' option on that module action menu.

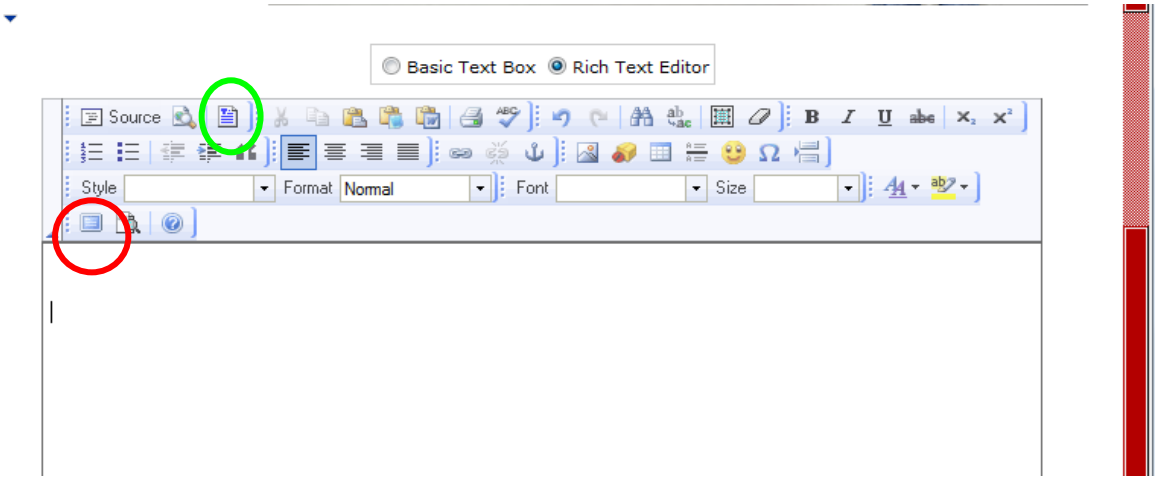


Editing a Textbox

Each text box has some settings. These can be accessed by clicking on the Settings menu option of the Module Action Menu. More on this later.

So to edit the text in the text box bring up the textbox's module action menu and click 'edit text' or 'edit content'. If you don't see an edit content then it isn't a textbox and you should continue looking for a menu that does give you the option.

You will then be taken to a textbox editor screen made especially for editing a text box's contents. It is like a word processor.



You will notice in the bottom left hand corner of the top section there is a square looking icon (highlighted in red). This button makes the textbox editor screen – full screen size. Which makes it easier for editing larger amounts of text. If you **do** go into full-screen mode, you will need to press it again later to come out of full-screen editing mode. **When in a textbox editor, you must regularly save you work, as it will timeout after 20 minutes or so. It's the nature of web pages I'm afraid, all advanced web sites have to have this timeout feature. So just be aware of that.**

Then it is like a Word Processor, if you want to put a title at the top of the text box then click near the top and start typing and formatting the text. And then click elsewhere inside the textbox to start typing other text. Just type some text in to get used to doing this.

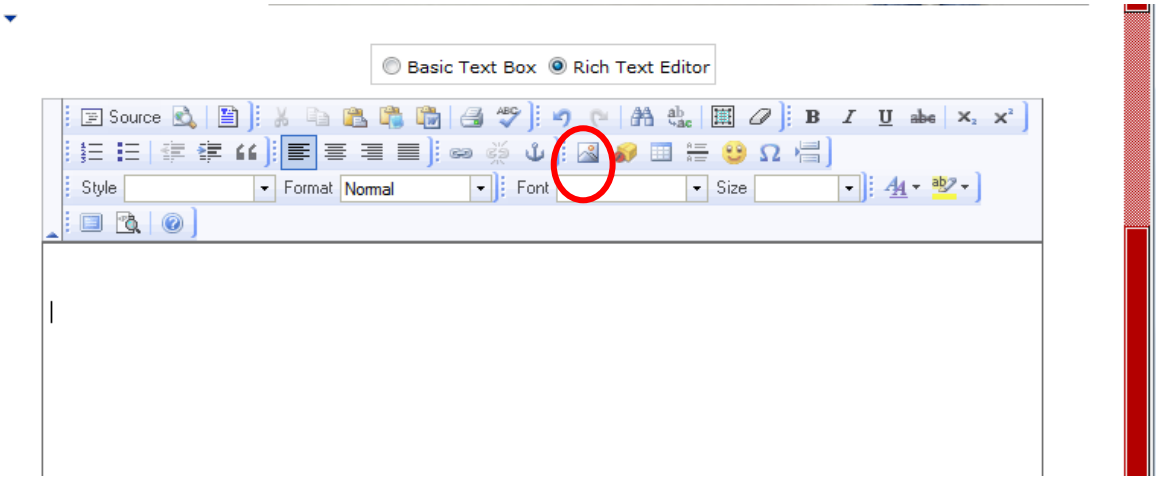
For best results we find that it's best to type the text out into the text box. Then select the text with your mouse and use the formatting tools at the top of the textbox editor to format the text i.e. make it bigger, smaller, bold, underlined etc. Just like in Microsoft Word. This getting started guide document assumes you know how to format text like in Microsoft Word.

When you've finished editing a textbox with the textbox editor (come out of full screen mode if you are in it), scroll down to the bottom of the page and click update/save.

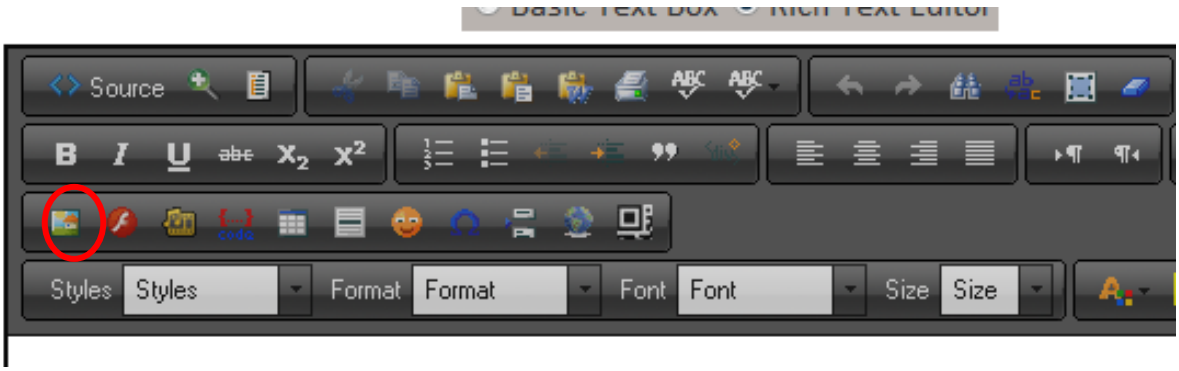
Inserting an image into a Textbox

Ok so you should be now realising how you are going to make changes to your website in the future using this textbox contents to piece together a web page full of text. You can also insert images into your textbox.

When editing your textbox you will notice a picture button along the top (marked with the red circle in the image below). Place your mouse cursor into the text box where you want to place you picture. Then click this button.

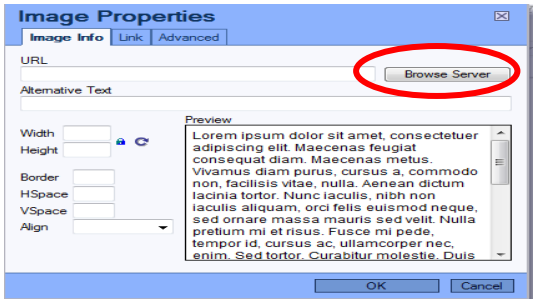


The button might look like this:

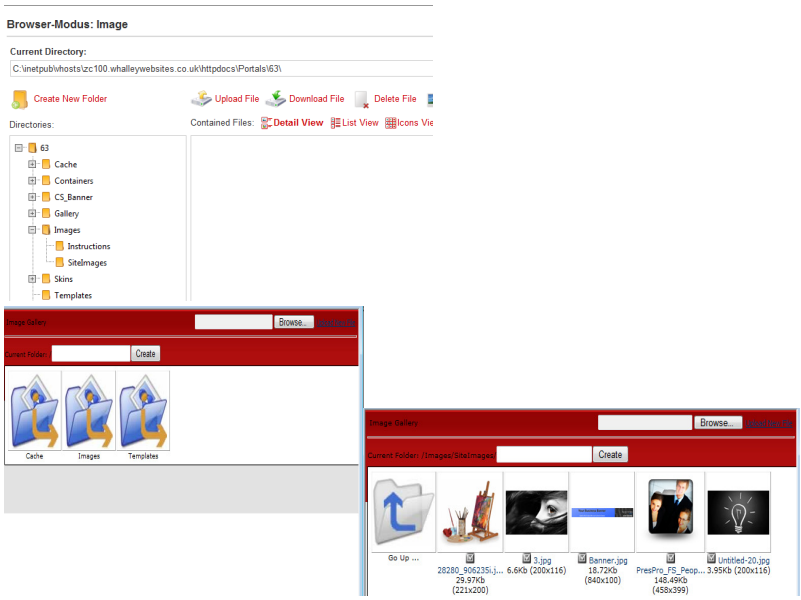


Please note you will need to turn off all pop-up blockers in Internet Explorer for this to work as windows will popup when you are inserting an image.

An ‘Image Properties’ window will popup. First thing we need to do is click the ‘Browse Server’ button to find the picture we want to insert. You will then see an ‘Image Gallery’ window popup.



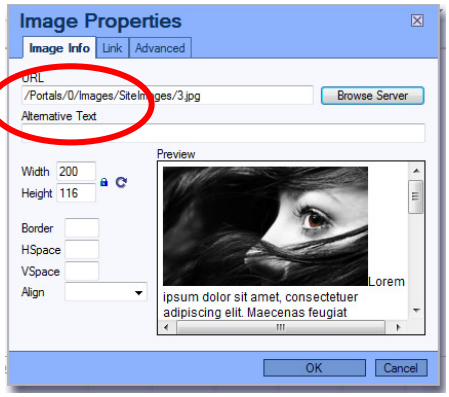
The image gallery will either look like one of these screenshots:



You can then browse the folders on the left hand side by clicking on the plus signs. Or by clicking on the folder icons.

If your picture hasn’t been uploaded to the server yet then click the browse button (or Upload File button) at the top of the image gallery window to browse your computer’s picture folder for the image you want to display. When you’ve found the picture click Open, and then you’ll be taken back to the image gallery where you’ll need to click the ‘Upload New File’ link (top right) to actually upload your image to the image gallery that is stored on our server.

Once you have the picture in the Image Gallery it is just a case of clicking on the image thumbnail you want, and it will take you back to the image properties window.



Ok you now need to choose the width and height the image shall be on the screen. This is in pixels, you'll get used to how many pixels looks good eventually. But for now if the image size is bigger than 800 pixels wide it's probably too big, so reduce it to 400 or 200 at a guess. You can always come back to this screen later (see: changing an image) if the image is too big or too small when you look at it later on.

Choose from the Align drop-down, either left or right.

And that's it, click OK. And it will take you back to your text box editor.

If when you look at it the image is too big, just right click on the image with your right mouse button and click Image Properties on the menu that pops up and it will take you back to the image properties screen where you can modify the size again, and click OK.

You will also notice the Link tab at the top, use this link to enter a URL (a website address) and the picture will become a link to THAT website address!!!

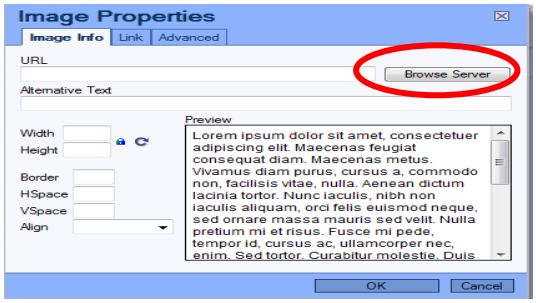
And that's it you have now inserted an image in to the text box. Easy.

Changing an image in a Textbox for another

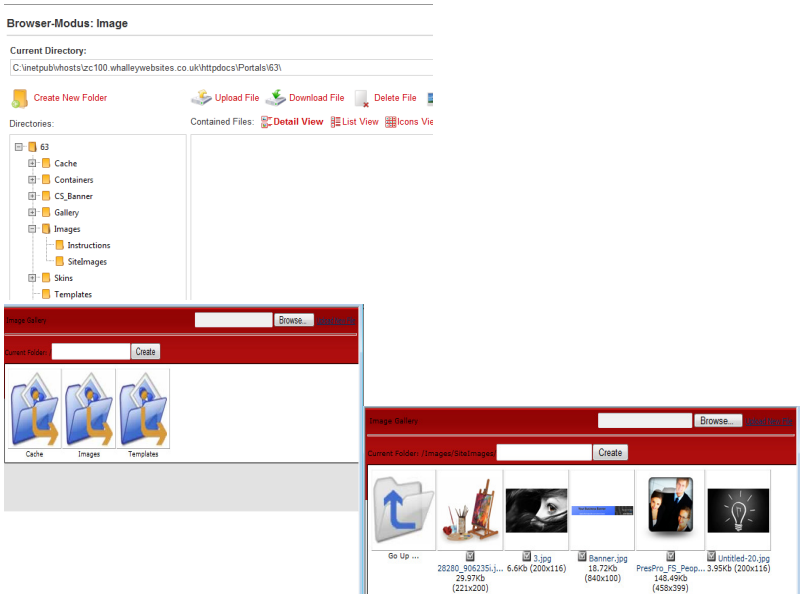
You need to be editing the textbox. See Editing a Textbox section

Lets say you want to change an image for another image, inside a textbox. or change the width and height.

1) Click on the image you want to change.
2) Then **Right** Click the image. Click on Image Properties.
3) An 'Image Properties' window will popup. Here you can change the width and height very easily.
4) If you want change the image to another image then First thing we need to do is click the 'Browse Server' button to find the picture we want to insert. You will then see an 'Image Gallery' window popup.



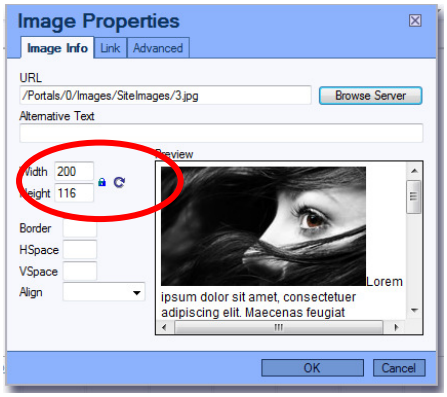
The image gallery will either look like one of these screenshots:



You can then browse the folders on the left hand side by clicking on the plus signs. Or by clicking on the folder icons. Until you see the image you want to change it for.

If your picture hasn't been uploaded to the server yet then click the browse button (or Upload File button) at the top of the image gallery window to browse your computer's picture folder for the image you want to display. When you've found the picture click Open, and then you'll be taken back to the image gallery where you'll need to click the 'Upload New File' link (top right) to actually upload your image to the image gallery that is stored on our server.

Once you have the picture in the Image Gallery it is just a case of clicking on the image thumbnail you want, and it will take you back to the image properties window.



Ok you now need to choose the width and height the image shall be on the screen. This is in pixels, you'll get used to how many pixels looks good eventually. But for now if the image size is bigger than 800 pixels wide it's probably too big, so reduce it to 400 or 200 at a guess. You can always come back to this screen later (see: changing an image) if the image is too big or too small when you look at it later on.

Choose from the Align drop-down, either left or right.

And that's it, click OK. And it will take you back to your text box editor.

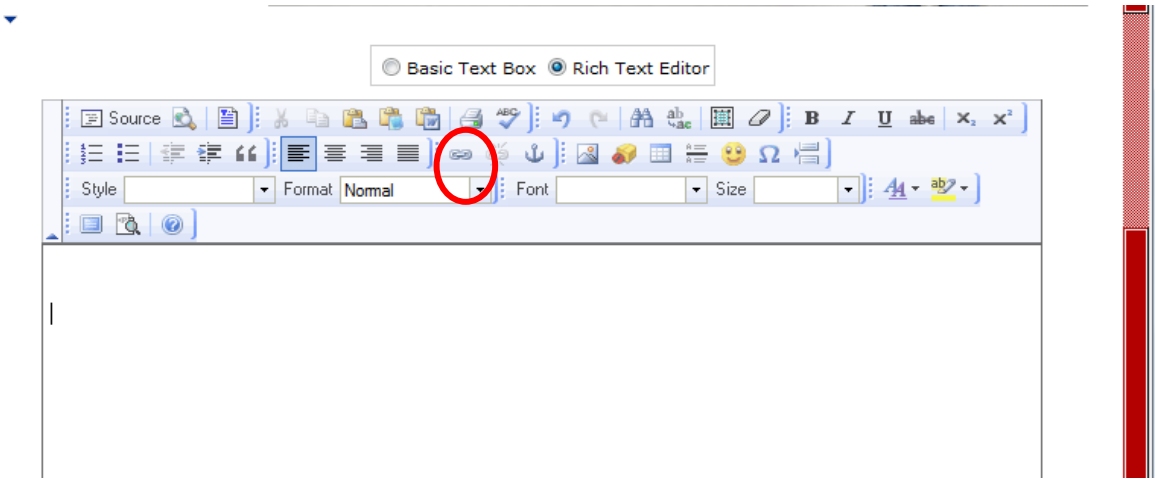
If when you look at it the image is too big, just right click on the image with your right mouse button and click Image Properties on the menu that pops up and it will take you back to the image properties screen where you can modify the size again, and click OK.

You will also notice the Link tab at the top, use this link to enter a URL (a website address) and the picture will become a link to THAT website address!!!

And that's it you have now inserted an image in to the text box. Easy.

Inserting a Link into a Textbox

The best thing to do here is type the text that you want to be a link; into the textbox for example "This is a link to another website". Then select that text and click the link button at the top (which is the red circle in the picture below.)



A Link window will popup. You can either link to another website (for example www.yahoo.com) by entering that website address into the URL field. Or if you want to link to another web page (or indeed a pdf download file for your visitors to download) on your website, then click the 'Browse Server' button, and then choose the appropriate option. Then either choose the page on your website from the drop-down if you want to link to a page on your website. Or if it is a download file you want to link then choose the folder from the 'File Location' drop-down and the particular file from 'File Name' drop-down.

Click 'Use Selected Link'

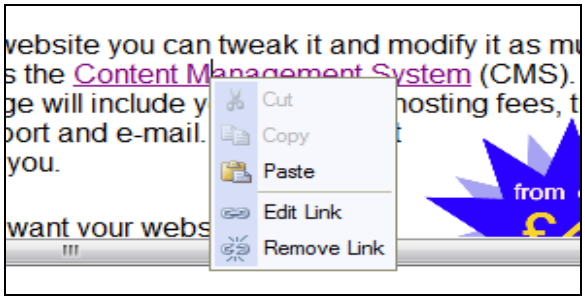
Click Ok.

And you're done.

How to Edit or change a Link that is already on a page

If you have already placed a link on to a page and find that you want to change it, then there are two ways of doing this. You of course have to be editing the text box in which the link is located to be able to edit the link, see earlier section if you're unsure.

The first method of editing a link is to delete the link using the backspace key. The second and preferred option is to right click on the link when a popup menu will appear upon doing so.



On the popup menu is the option to 'Edit Link'.

Once in here change the 'Link Info' and 'Target' information to whatever values you want them to be.

Then press Ok.

(Press update at the bottom of the text editor if you're finished with the textbox contents)

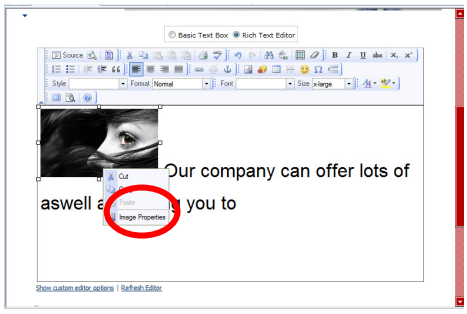
Job done.

How to Edit or change a Link that is already on a page

How to make an image become a link

If you have inserted an image into a textbox and you want to make it into a link so that it links to another page on your site, an external website (i.e. www.yahoo.com), or links to a file to download then this is how that is done.

Insert an image in to your textbox in the already described way.



Right click on the image and left-click on 'Image Properties'. A new window will popup for the Image Properties.

At the top of the Image Properties window you will see the 'Link' tab. Click on that.

If you know the website address you want to link to (http://www.yahoo.com for example) then type that into there. If you are wanting to link to a web page on your site, or link to a file on your site to download then click on browse server and choose from the appropriate option.

When you have selected the file or page you are wanting to link to click 'Use Selected Link'.

Click on Image Info at the top to see a preview of the image. You might see a border around the image in the preview, if you don't want this border then enter a '0' (zero) into the border field (which tells the website editor to have a border of thickness value zero).

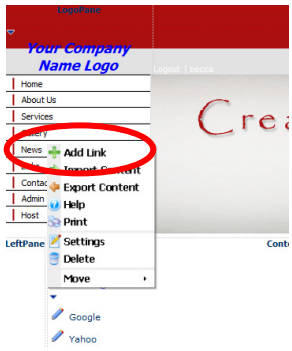
Then click Ok

And you're done.

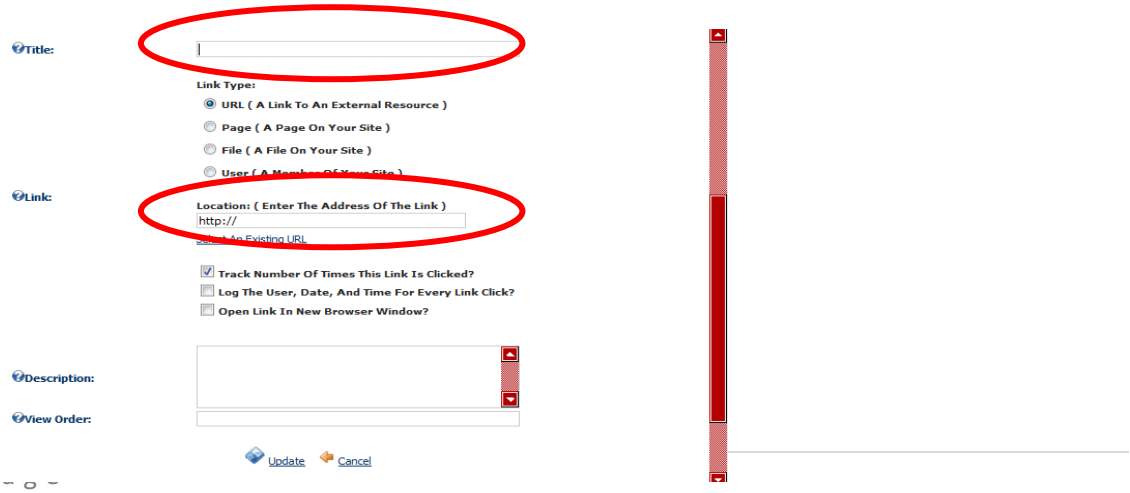
How to add a link to your links page

We know how useful it can be to show potential customers all of the linked websites with your company. This is why we have already added for you a links page which allows you to you're your website to other websites therefore providing your customers with links you think are useful. To add a link to your links page click on the link menu .

On this page you will see a heading LINKS PAGE this will have a module action arrow underneath it. Hover over the module action arrow and a module action menu will appear.



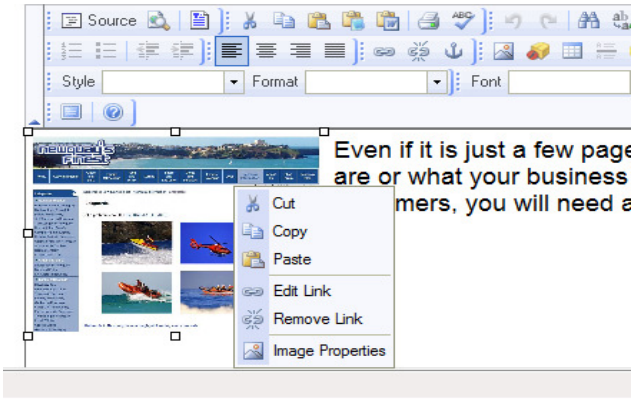
Click on the module arrow under LINKS PAGE and then on the module action menu click on add link.



Creating a simple image popup

Usually you have a small image on your web page that you want to 'blow up' to your visitors when they click on it. So you need to create a link for this image that links back to itself, and pops up in a new window. This process is similar to creating an image link, and you are going to link to the same image that you are displaying on the web page.

Insert an image in to your textbox in the already described way.



Right click on the image and left-click on 'Image Properties'. A new window will popup for the Image Properties.

At the top of the Image Properties window you will see the 'Link' tab. Click on that.

Click on browse server and choose the 'File (A File on your Site)' option. Select the location of the image from the 'File Location' drop-down. Then select the 'File Name' of the image you want to popup in a new window when this image is clicked (usually this is the same image).

When you have selected the image you are wanting to link to click 'Use Selected Link'.

Choose from the 'Target' drop-down the 'New Window (_blank)' option.

Click on Image Info at the top to see a preview of the image. You might see a border around the image in the preview, if you don't want this border then enter a '0' (zero) into the border field (which tells the website editor to have a border of thickness value zero).

Then click Ok

And you're done.

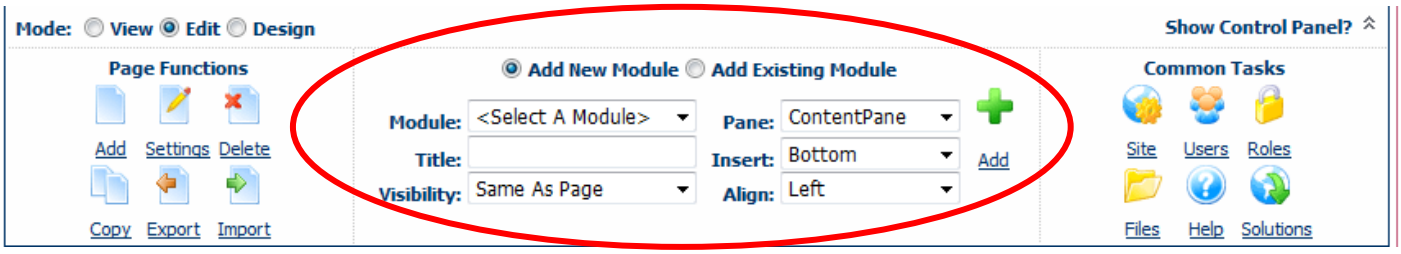
Deleting a Textbox from a page

To delete a textbox off the page bring up the Textbox's Module action menu (by hovering your mouse over the arrow in the top left hand corner of the textbox). On the menu you will see the Delete command. Click this and confirm you want to delete it by pressing OK.

Easy.

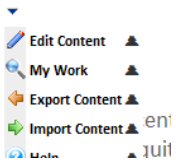
Adding a new blank Textbox to a page

We're going to add a new text box to the Content Pane (you could equally add a text box to the rightpane or leftpane or any of the panes). Using the control panel at the top, select 'Text/HTML' or 'HTML' from the module drop-down, make sure contentpane is selected from the Pane drop-down, and then click the Add button.



You will then have a brand new text box in the content pane of your new page. It'll look something similar to below

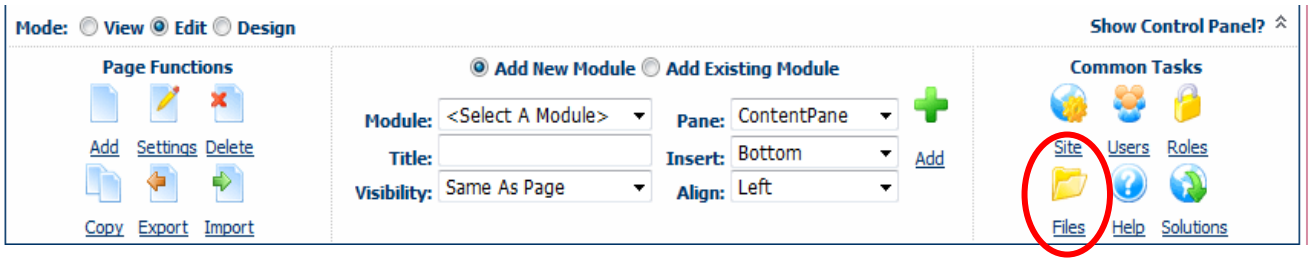
And when you hover over it it will show something like



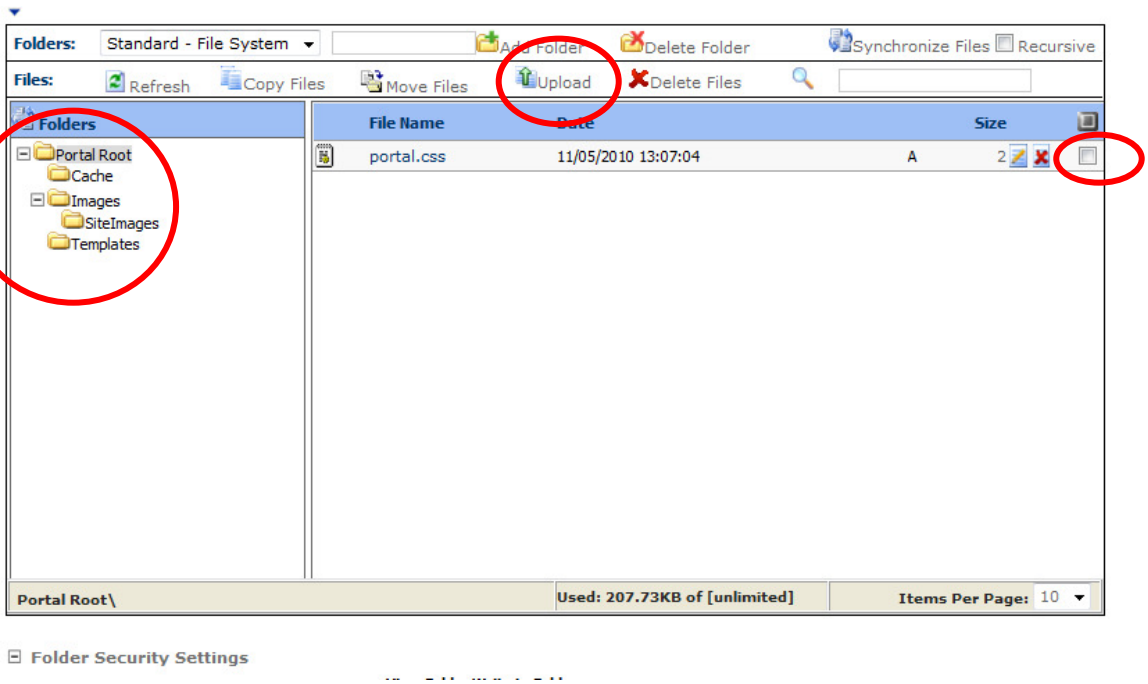
The menu shown above is called the Module Action Menu. As you may already know.

The File Manager

To access the file manager from the Control Panel. Click on the Files icon on the right hand side. See below



The file manager allows you to see all the files (whether they are pictures, PDFs, etc) that are inside your website's webspace on the server. You can use it to organise your files by creating new folders with meaningful names, delete files/folders, and upload new files from your PC.



On the left hand side is the hierarchy of folders in your website's webspace (your webspace is called a Portal in your file manager).

To look inside a folder in your portal/webspace click on the plus sign next to the folder to expand it. Click on a folder of your choice and it will show you the contents of that folder on the right hand side. Each line on the right hand side represents a file.

To delete a file from a folder you can click the red cross next to each line, or tick a few files and then click Delete Files at the top.

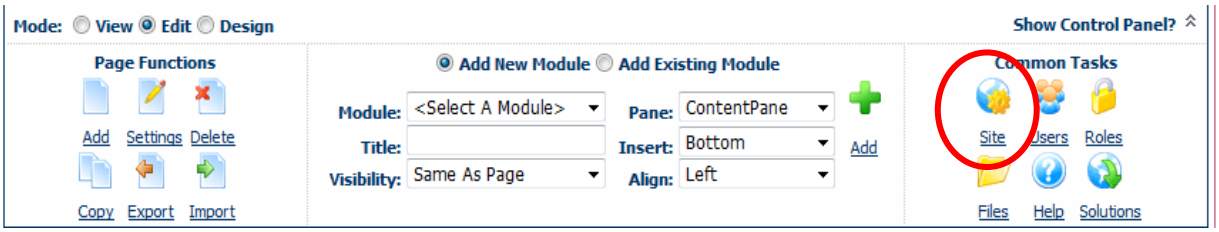
To upload new files from your PC **into the folder that you are currently looking at**, click the Upload button at the top of the File Manager.

Click browse to find the image you want to upload in your Pictures folder on your PC. Once you've done that click the Upload File link button. Then you will be returned to the File Manager where you will be able to see the image you've just uploaded in the list of files on the right hand side.

If you want to add a new folder **inside the folder that you are currently looking at**, then type the name of the folder into the field at the top (next to the Add Folder button), and click the Add Folder button.

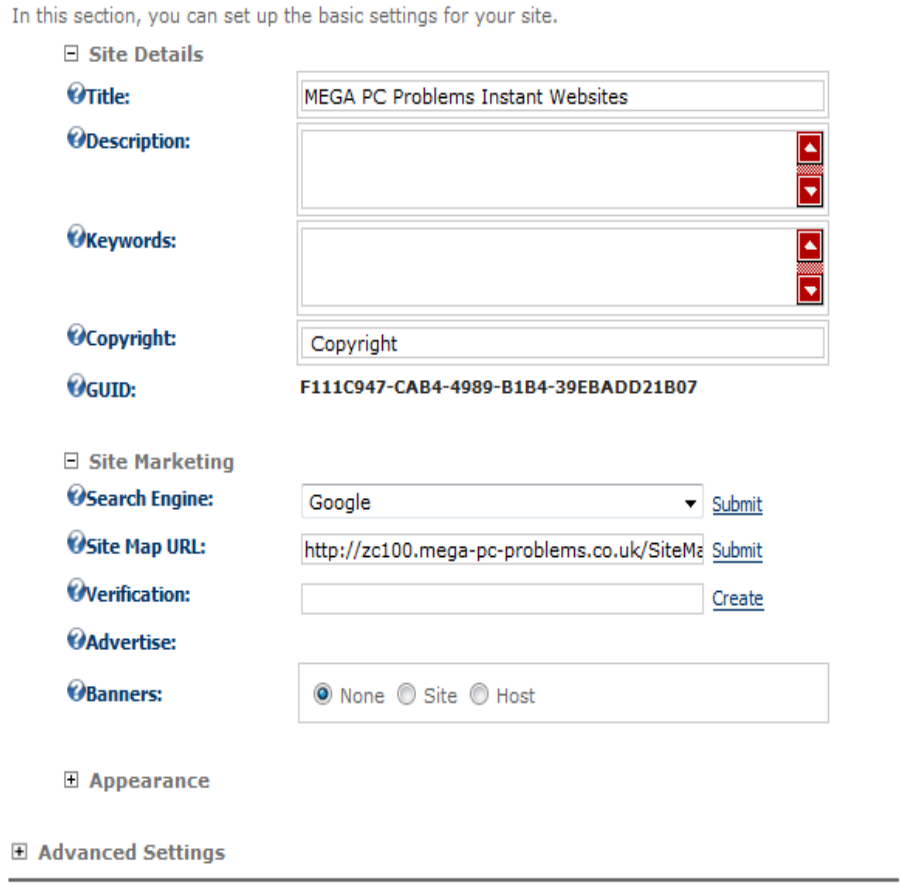
At the bottom of the File Manager you can see how much of your webspace you have used. You can also change the number of items displayed per page of files, should you have lots and lots of files to display in the File Manager. And you can also see which folder you are currently looking in at this moment in time (on the left hand side of the bottom of the File Manager).

Tip: the word 'root' means 'top level' of the hierarchy. If you see the words Portal Root, it means the top level of the portal folder structure.



Site Settings

If you click on the Site button on the right hand side of the control panel you will be shown some settings that apply to your website.



You can change the Title of your website, the keywords. please **Don't** play with the Site Marketing, we do that for you at the beginning and should only be done once, if you're not in Google yet it's because it takes a few months. And if you're not very high in the rankings we can help optimise your website in other ways, but this won't help you there.

If you expand the appearance section, the main thing in here is the Logo. If you're not happy with your current Logo Banner at the top of your website, then this is the place to upload a new one.

If you have had more than one skin (coloured theme) created for your website you can change the Website's Skin and Container using the 'Portal Skin' and 'Portal Container' drop-downs.

Ignore the Advanced Settings. Consult with us if you are thinking about playing with them as we set up all the applicable options for you right at the beginning.

Unless you are an advanced HTML and Stylesheet programmer, please don't play with the Stylesheet Editor.

Visitor Statistics

If you want professional Google analytics installing on your website then this can be done for a small cost. You can do it yourself using Google's instructions but it's a bit complicated so we can help.

http://www.whalleywebsites.co.uk/GoogleAnalytics.aspx for more information.

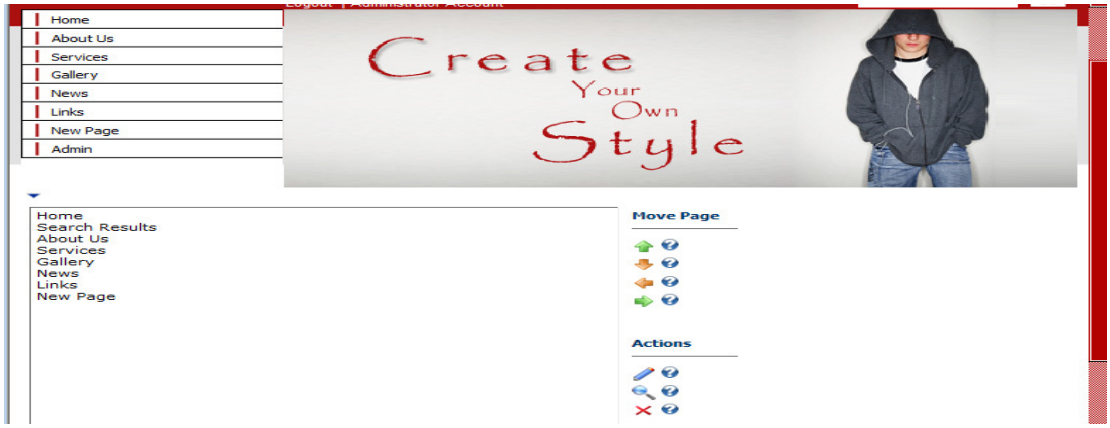
Or we can place a free counter on your website similar to:

for free

Page Management

If you want to see all the pages on your website you can. Remember the admin menu?

Hover your mouse over the admin menu. Click Pages.



You can see all the pages in the page list in the big box. You will notice if you read it carefully that the order of the page list corresponds with the order (and hierarchy if applicable) of the menu on your website. If you select one the pages you can use the Move Page section to rearrange the pages on the menu, i.e. move them up, move them down etc.

If you click on a page then you can edit that page's settings, View that page, or even delete that page using the Actions section on the right hand side.

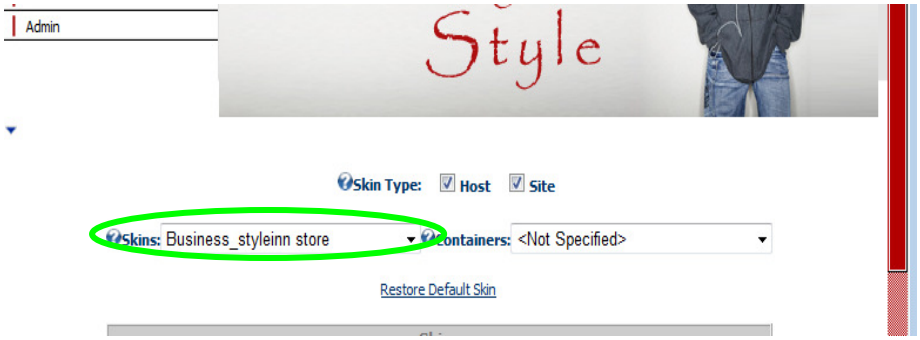
If you want to add a new page then click Add New Page at the bottom.

How to change the template on your website.

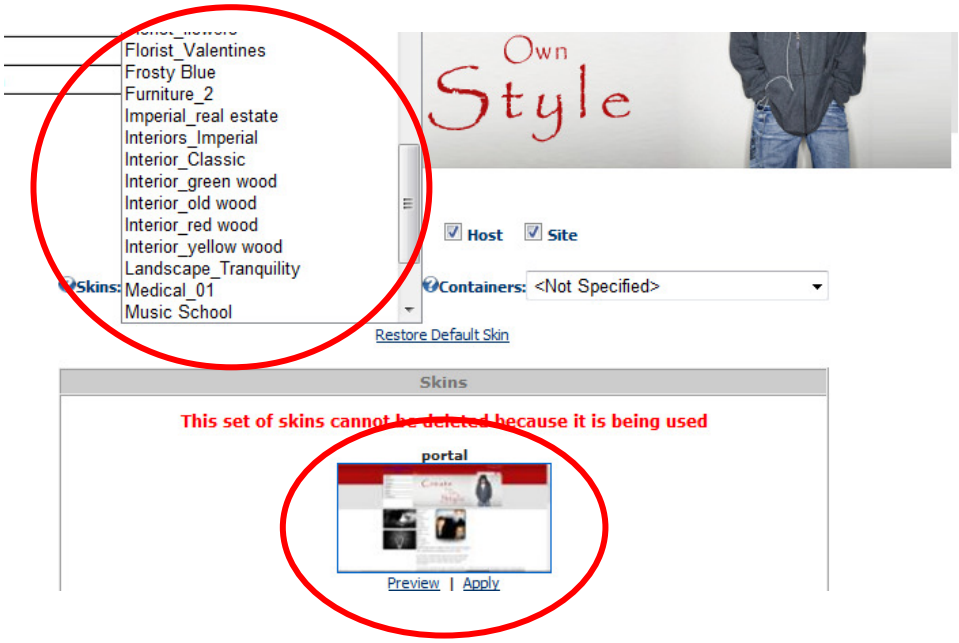
To change your template for your website hover over the admin menu and click skins. This will take you to a page with lots of icons and text.

A template is also be known as a skin.

Find the box which is labelled skins, circled in green below and click on the arrow.



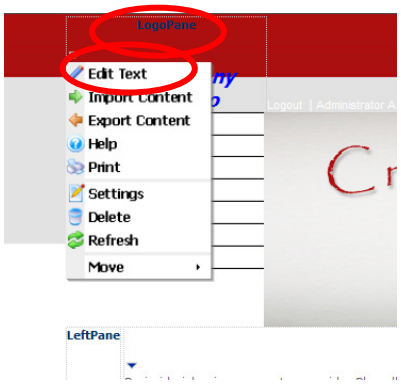
A list of possible templates will shown, circled in red below. Once a skin has been picked an icon of the image is shown, if you are happy with your selection click apply, if not choose again from the list.

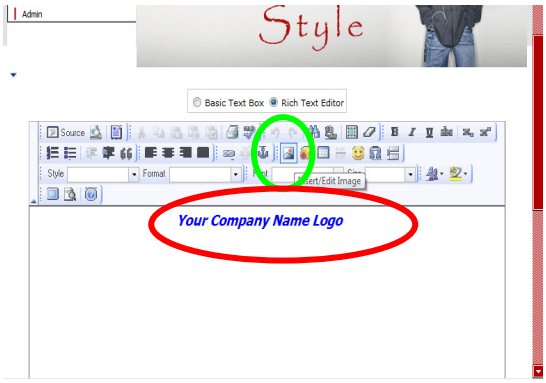


A small image showing what the website will look like is called a portal

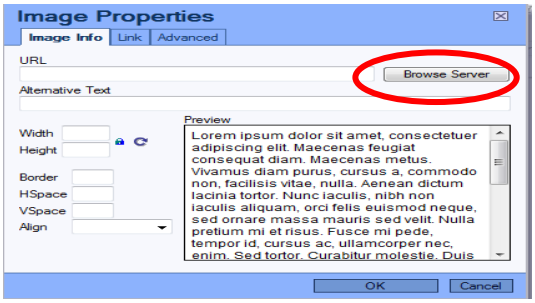
How to upload a logo to your website

Many businesses find it useful to have a logo or a slogan, as this helps potential customers identify and remember who and what the business is. Therefore it would be profitable to have your logo or slogan visible on your website; this is why we have made a purposeful pane, labelled Logo pane, for you to place your logo or slogan along with your brand name. This is located at the top left corner where it is most likely to catch your potential customer's attention. The logo pane is on every page of every template so the customers see it at every chance.





To upload a logo to your website you need to find the pane which is named logo pane, usually located top left on your website. Hover over the module action arrow, this will show the module action menu, as shown above. To edit the information that it is in this textbox click on select edit text. If you want to enter a form of written text, i.e. brand, slogan, and then click where it says Your Company Name Logo and enter your text. If you wish to enter a logo then click on the icon circled green above. An 'Image Properties' window will popup. First thing we need to do is click the 'Browse Server' button to find the picture we want to insert. You will then see an 'Image Gallery' window popup.



If you're picture hasn't been uploaded to the server yet then click the browse button at the top of the image gallery window to browse your computer's picture folder for the image you want to display. When you've found the picture click Open, and then you'll be taken back to the image gallery where you'll need to click the 'Upload New File' link (top right) to actually upload your image to the image gallery that is stored on our server. For more help refer back to section inserting an image into a textbox.

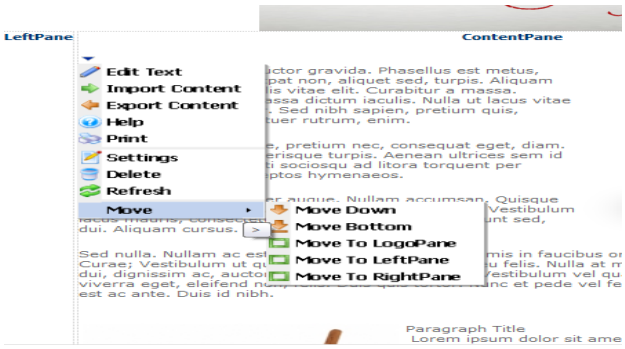
Once you have the picture in the Image Gallery it is just a case of clicking on the image thumbnail you want, and it will take you back to the image properties window.

Then just press ok when you're happy and it's all done!

How to move a textbox from one pane to another

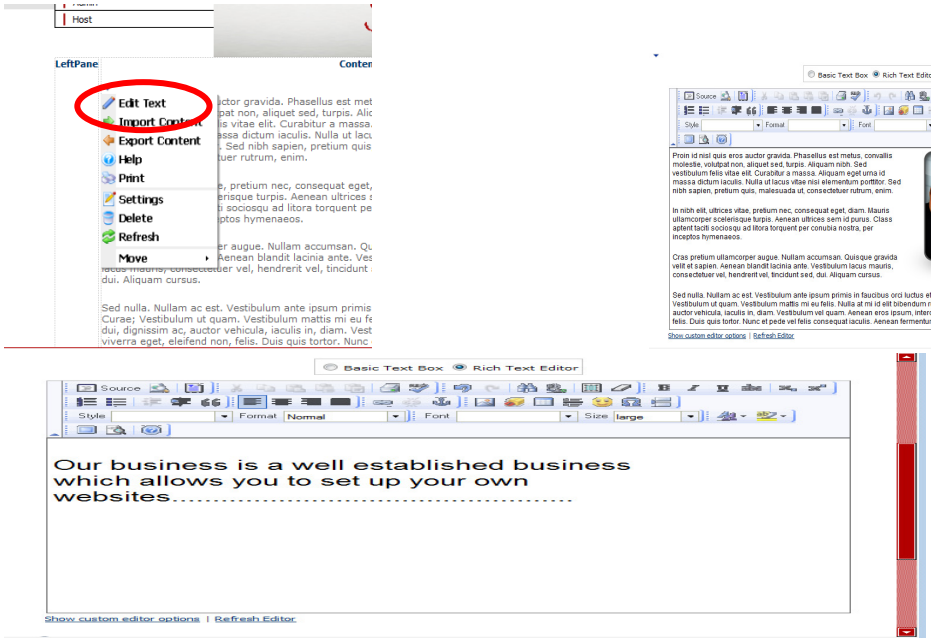
If you have inserted a textbox into a pane but decide you would like to move it then first you need to click on the module action arrow for that textbox which will show the module action menu, circled shown below. In this menu several options will be given to you. At the bottom of the module action menu will be an option to MOVE the textbox, hover over this option and another module action menu will be shown to you. Using this menu you will be able to move this textbox to another pane by selecting move to left pane, move to right pane etc.

If you wanted to rearrange the textboxes within the pane, e.g swap the top and bottom textboxes over, then click on the module action arrow and then continue on to hover over the MOVE option which will allow you to move the textbox, up/down/ move to the top/move to the bottom. These options allow you to position your textbox's wherever you want to within the panes.



How to edit text within a textbox

As you will notice example textboxes have already been inserted into your templates. Within these textboxes are written texts to delete this text simply hover over the module action arrow and then click on edit text on the module action menu. Highlight all of the text in the text box and press delete, this should leave you with an empty textbox to start typing in.



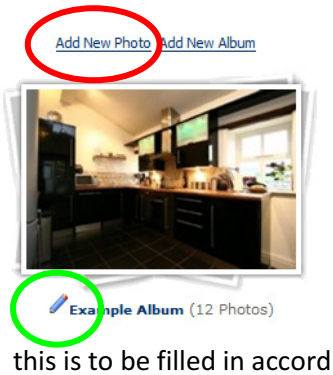
Gallery

How to add pictures to your Gallery

We know how important images and photos are when trying to capture a potential customer's attention. However text information is just as important, meaning most photos and images don't get shown. For that reason we have added a gallery page which allows you to show information about your business not only through text but images aswell. Photo albums can be made allowing customers to see visual examples of your work.

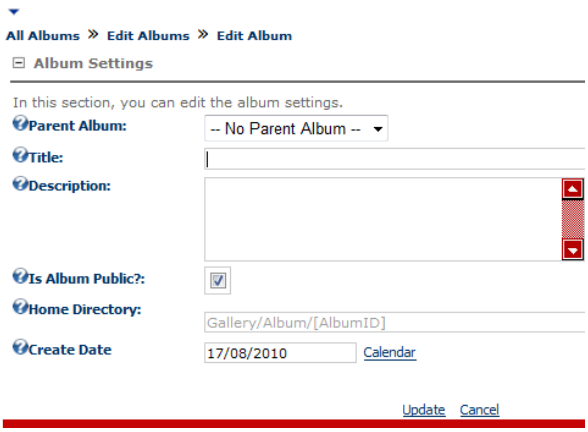
To add a picture to your gallery start by clicking on the gallery menu. This will direct you to another page, on this page we have already made an example album showing you what you can do with your photos.

To add a new photo(s) click on the add new photo button, as circled below. This will direct you to another page. Choose if you wish to update or create a new album and fill in the details, album name etc, and then click next to continue. Click select images, this will take you to your computer desktop where you can choose which images you wish to upload to your gallery. If you wish to select more than one image hold shift and highlight which images you want. Once you have chosen your pictures press open and wait for your pictures to upload click next. Then save all and you will have a new album with new photos in.



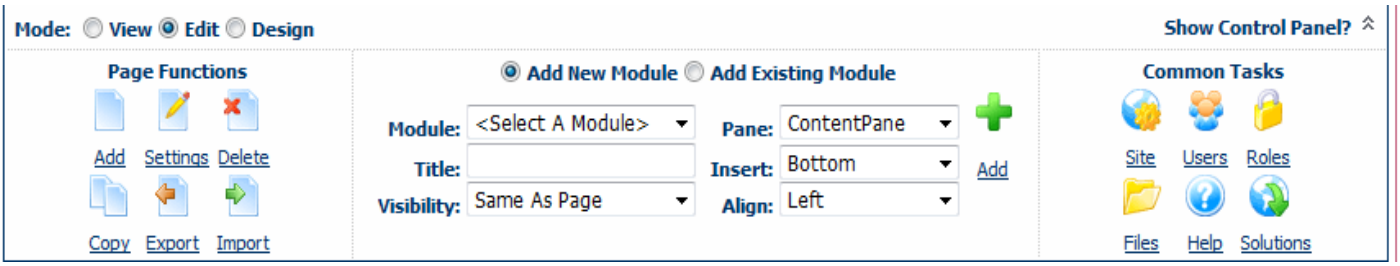
Another way to create a new album is by clicking on the add new album next to the add new photos which will direct you to the page below, this is to be filled in accordingly and then click update and it's done!

If you wanted to edit a photo or an album then click on the pencil image next to it circled in green above and the edit the information as you wish.



The control panel

Ok so we're happy that this picture below is the control panel – yes? Great. It looks complicated but you'll only use bits of it at a time.

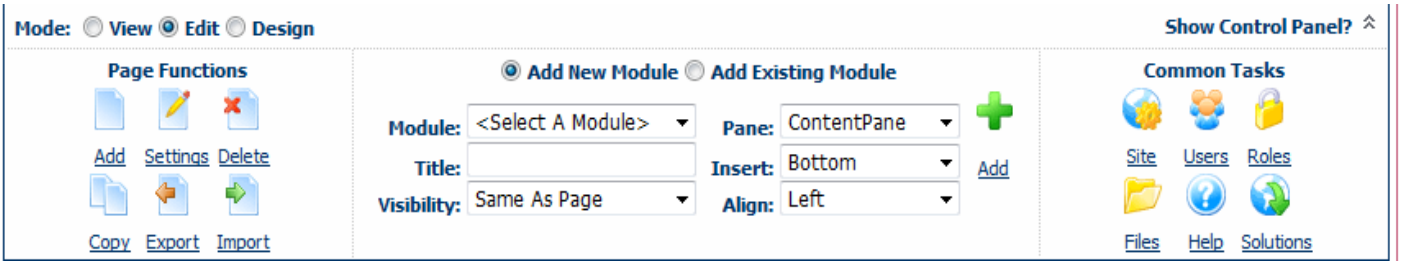


On the left hand side of it we can add a new page or delete the page we're looking at (at the time). We can look at the settings for a page, copy a page (which is useful if you have one page you like, and you know you need a second page that needs to look similar to this one – just click Copy and you'll have a second copy of it (in a reasonably much quicker time than if you were to recreate the second page from a blank new canvas, hence this button's usefulness)). Export and import allow you to backup a page, but don't use these please, they're not important.

In the middle section you have the contents section. Each page is made up of one of more modules that are placed onto the panes we talked about earlier (left, right, content panes). We'll go through this later, but basically to add a textbox or text area that you can type text into and place images on, you select the 'Text/HTML' module from the Module drop-down. Tell the CMS which pane to place it into from the 'Pane' drop-down menu (so choosing the 'content pane' will place the module into the middle pane on the page, shown in earlier screenshot).
Then click the add button.

The other options are only for advanced use, but quickly: Title gives the textbox a meaningful name, Visibility decides if the module should be visible to everyone who looks at the page (most commonly you want it to be visible to everyone), Insert decides where on the 'Pane' to place the module (not very useful), and Align decides how the module should be aligned on the page, Left, Centred, Right.

> This is probably a bit too much to take in, but we'll cover it later again so just accept it for now and it'll fall together later on



Ok so still looking at the control panel. On the right hand side you can see some more common tasks, which aren't directly related to editing the page. The Site link takes you to all the settings related to the entire website, you won't need to go in there but have a look if you want to. It allows you to change the name of your website, change your logo banner at the top of your website, and there are some redundant options which aren't useful to you unless otherwise stated, so it is best not to touch those settings once they're setup correctly.

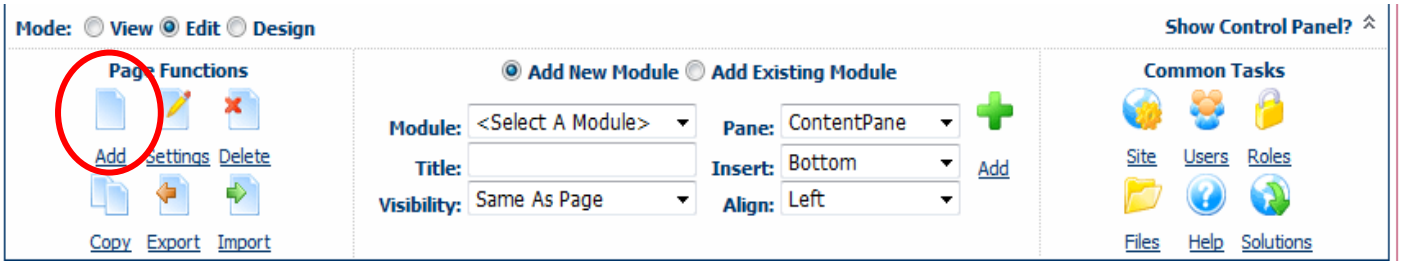
The users section is great for controlling which users can view which pages on your website but that is an advanced feature and is beyond the scope of this document, but it is possible. The same applies for Roles, and Solutions. I wouldn't bother clicking on these; they're not useful for your week-to-week tasks as an administrator.

The Files option opens up the File Manager and allows you to upload the images you want to display on your website's web pages. You can also create folders to organise and store your images in if you plan on having a lot of images/pictures it's a good idea to organise them.

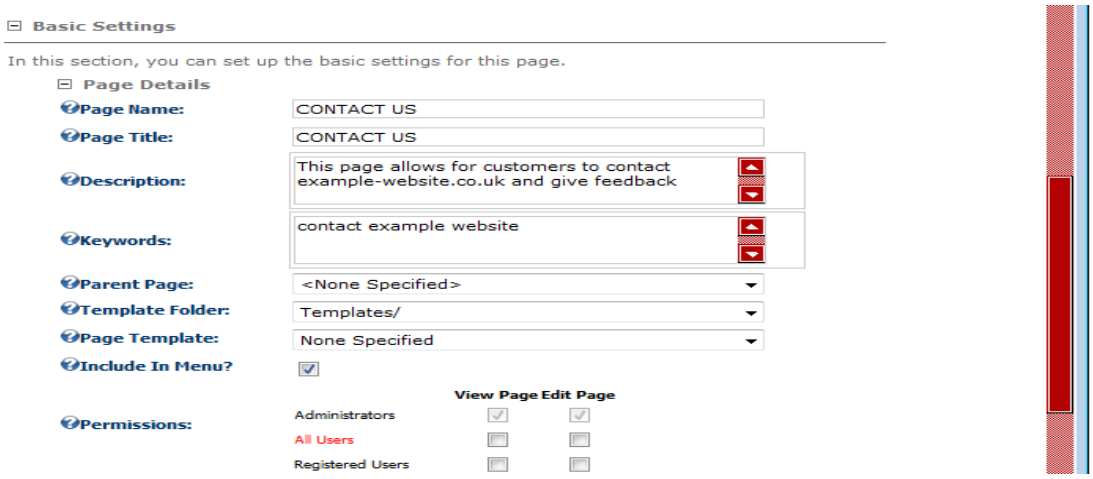
The help section is actually for us, your 'hosts', for when we get stuck, so ignore that and just ask us if you get stuck and we'll modify our help documents to include any new questions that are raised to help you and other customers too.

Create a new page

Ok let's create a new page. Assuming you are already logged in and can see the control panel at the top of the page, click on the Add button in the top left hand corner of the control panel.



You are then presented with the Add New Page screen:



Starting from the top fill in the Page Name, Page Title and a short description for the page.

The parent page drop-down allows you to create a parent-child hierarchy, which is also reflected in the menu, for example if you selected the Home page from the parent page drop-down option, the page you are creating would appear on the submenu of the Home page menu option when you hover the mouse over the Home page menu option. It's difficult to explain but if you choose a parent page then you will see what is meant by this next time you hover your mouse over the menu later on.

Continuing on is the option to 'Include in Menu?' If you uncheck this then a link to this new page will not appear in the menu. Sometimes this is useful to keep the menu from being clogged up and too busy. But that is a decision for you to make, as your website grows in size over time.

Continuing on, the next option is the Permissions option. You will notice there are two columns, one for selecting who can View this new page, and one column for selecting who can edit this page. Ordinarily you would want all visitors to view this new page, so just put a tick under 'View Page' next to 'All Users'. And you **wouldn't** want all users to be able to edit the page so you **shouldn't** put a tick under the 'edit page' column/permission. Do you see how it works?

Scroll down to the bottom and click on Update. And that's it – easy enough? Great. You've now added a brand new page. You will see it appear in the menu now, and so will all visitors to your site.

Please note you can only add as many pages as your tariff limit allows. Please contact us if you run out of pages to discuss options.

Conclusion

Ok so you've been walked through all the main components of the Content Management System. You will know by now that a website is not built instantly, or by magic. It relies on a bit of time being spent on it and desirable effects can be achieved through either careful planning or trial and error.

Most importantly, enjoy the freedom and flexibility of this truly excellent tool.