



Webs For Everyone

Content Management System

Reference Guide

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CMS Manager Reference Guide

Introduction.....	1
Logging In.....	2
Navigation Explained	4
Editing a Document	5
Page Set Up.....	6
Templates.....	7
Creating the right Page Hierarchy.....	8
Editing Page Text.....	9
Adding Page Images	10
Creating the Right Page Style	12
Save the Document	12
Publishing a Page.....	13
Sorting a Menu List	15
Creating new pages.....	17
Templates.....	19
Creating the Right Page Hierarchy	19
Completing Template Variables	20
Publishing a Page.....	21
Duplicating Pages and Sections.....	23
Adding Linked Pages.....	25
Preview	29
Page Preview.....	29
Site Preview	30
Managing Users	31
Adding New Users.....	31
Editing Users.....	35
Changing User Passwords.....	37
Deleting Users.....	40
Uploading New Images to the Gallery.....	41
Logging Out	43
Summary	44
Notes	45

Introduction

The Reference Guide covers all the main areas of managing your web site. These include:

- Editing pages
- Editing images
- Publishing and un-publishing a page
- Page Sorting
- Creating new pages
- Duplicating pages and sections
- Adding Linked Pages
- Previewing a page
- Uploading new images
- Creating New Users
- Managing users

The site consists of a public website front end and a Content Management System (CMS) Manager back end for the management of the public website. The CMS Manager has restricted access.

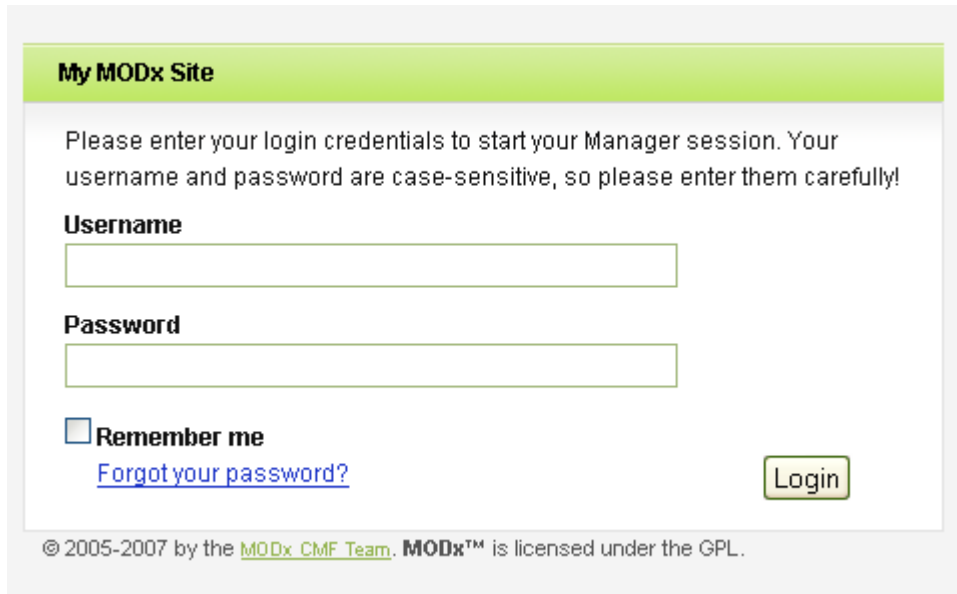
The web address for your CMS Manager will be the same as for your site with the addition of /manager at the end.

e.g. http://www.my_website_name.co.uk/manager

Your Login Details will be provided to you via an email.

Logging In

To log into the CMS Manager and enter your username and password as provided by your website administrator.



My MODx Site

Please enter your login credentials to start your Manager session. Your username and password are case-sensitive, so please enter them carefully!

Username

Password

Remember me
[Forgot your password?](#)

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Figure 1 Log in Screen

After you have successfully logged in you will be presented with the initial home screen as shown in Figure 2.

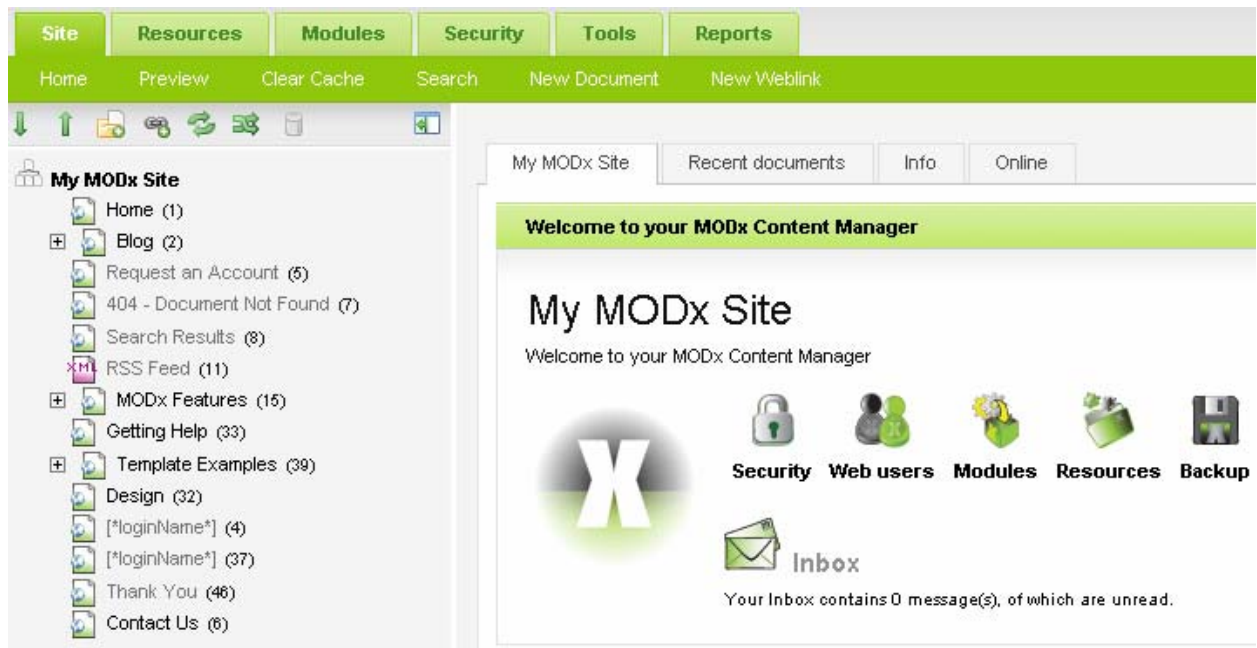


Figure 2 CMS Manager Home Screen

Navigation Explained

The left hand side navigation allows you to manage the pages on your site. All pages on your site are listed down the left hand menu in a tree structure like a family tree with parent, child and grandchild pages listed. When you first log in the tree will be closed only showing parent pages. The Main Screen will contain the content of the pages you will be updating.

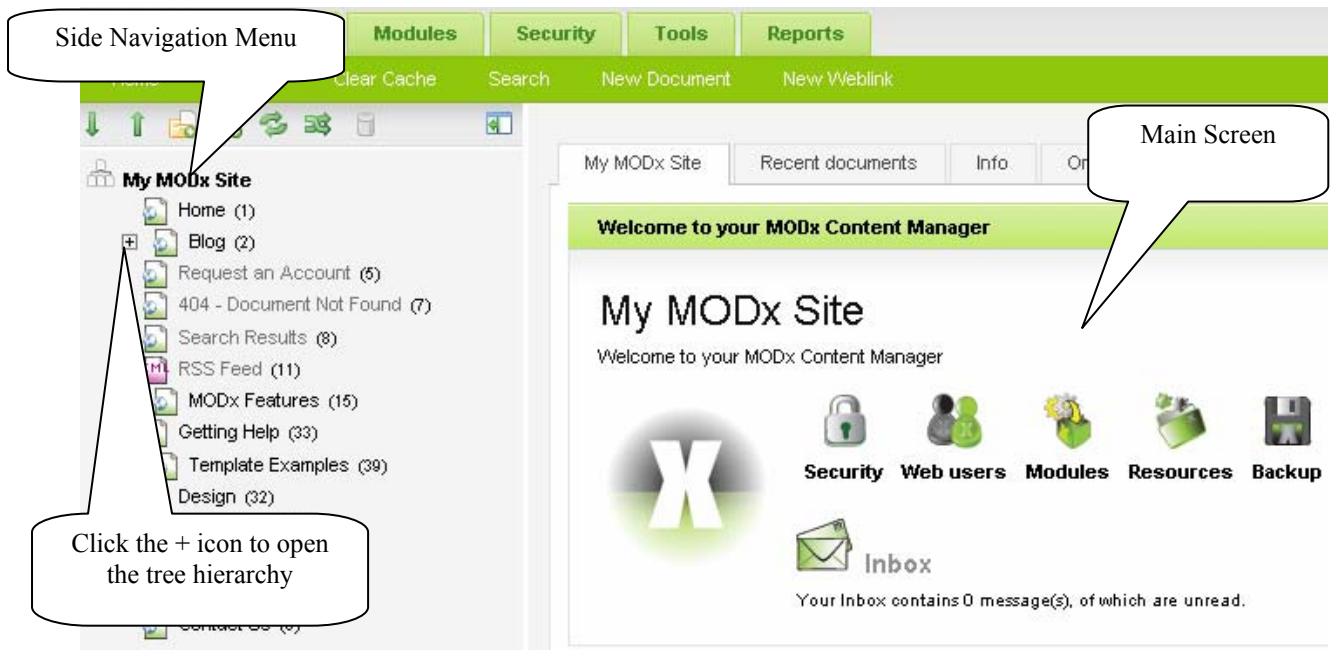


Figure 3 Navigation

Clicking the + icon on the left side menu will open the page tree structure of your site and reveal the child pages, clicking the + icon of a child will open the grandchild pages for the selected child page.

Editing a Document

Clicking the title of any page on the left menu will open the page in summary format on the main screen. Click Edit to open the current page for editing.

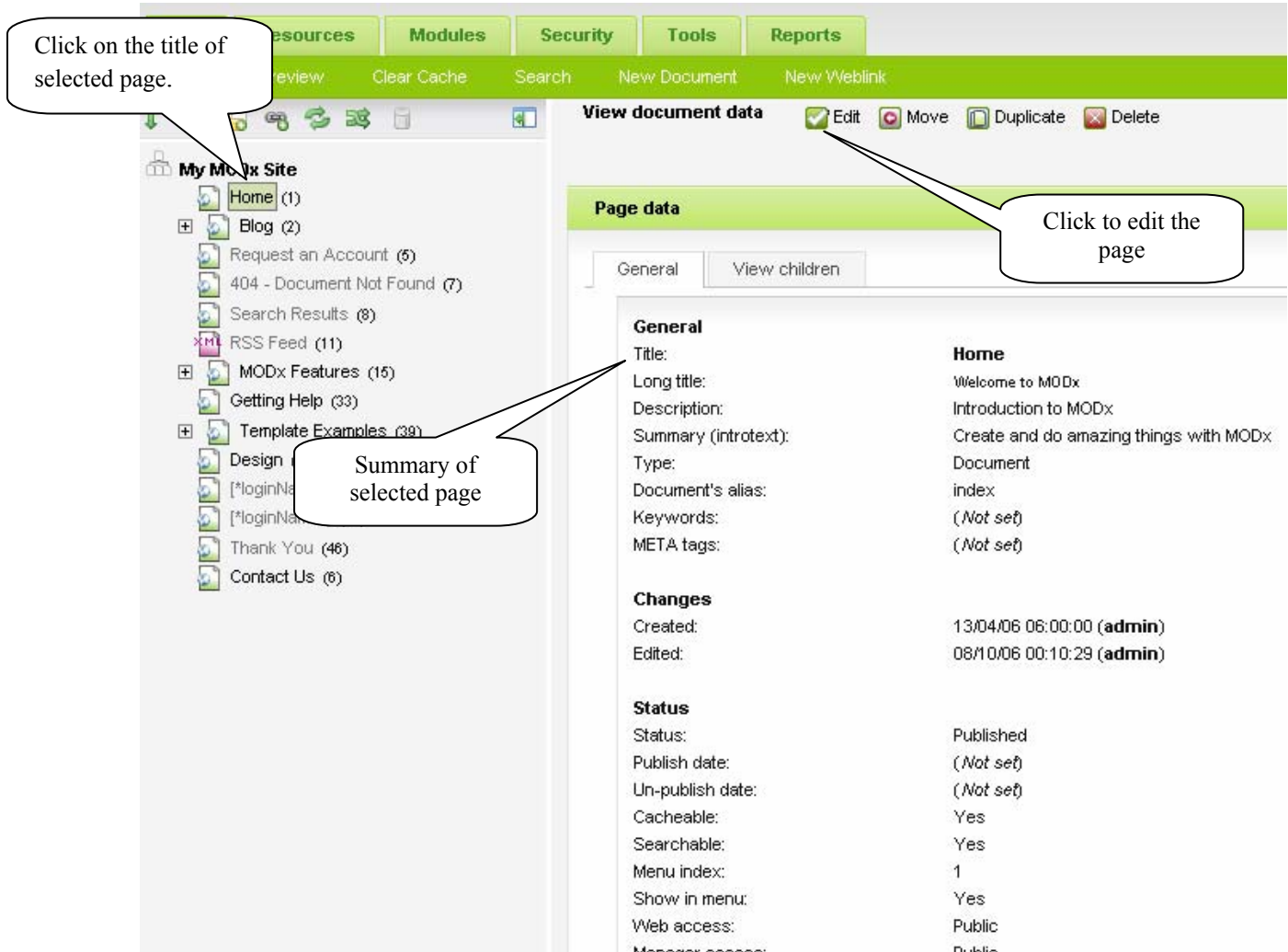


Figure 4 Page Summary

Page Set Up

The first field you are presented with on the page is the page title. You should choose a title that reflects the page. The text that appears on the Menu on the site will be taken from the Menu Title field. These may not always be the same but are very helpful in the maintenance of your site if they match.

The next important piece of information to note is the template that is used on a page. This determines the way the information and images will appear on the front end of your site. Each template places the elements of the page in specific places according to the rules of that template.

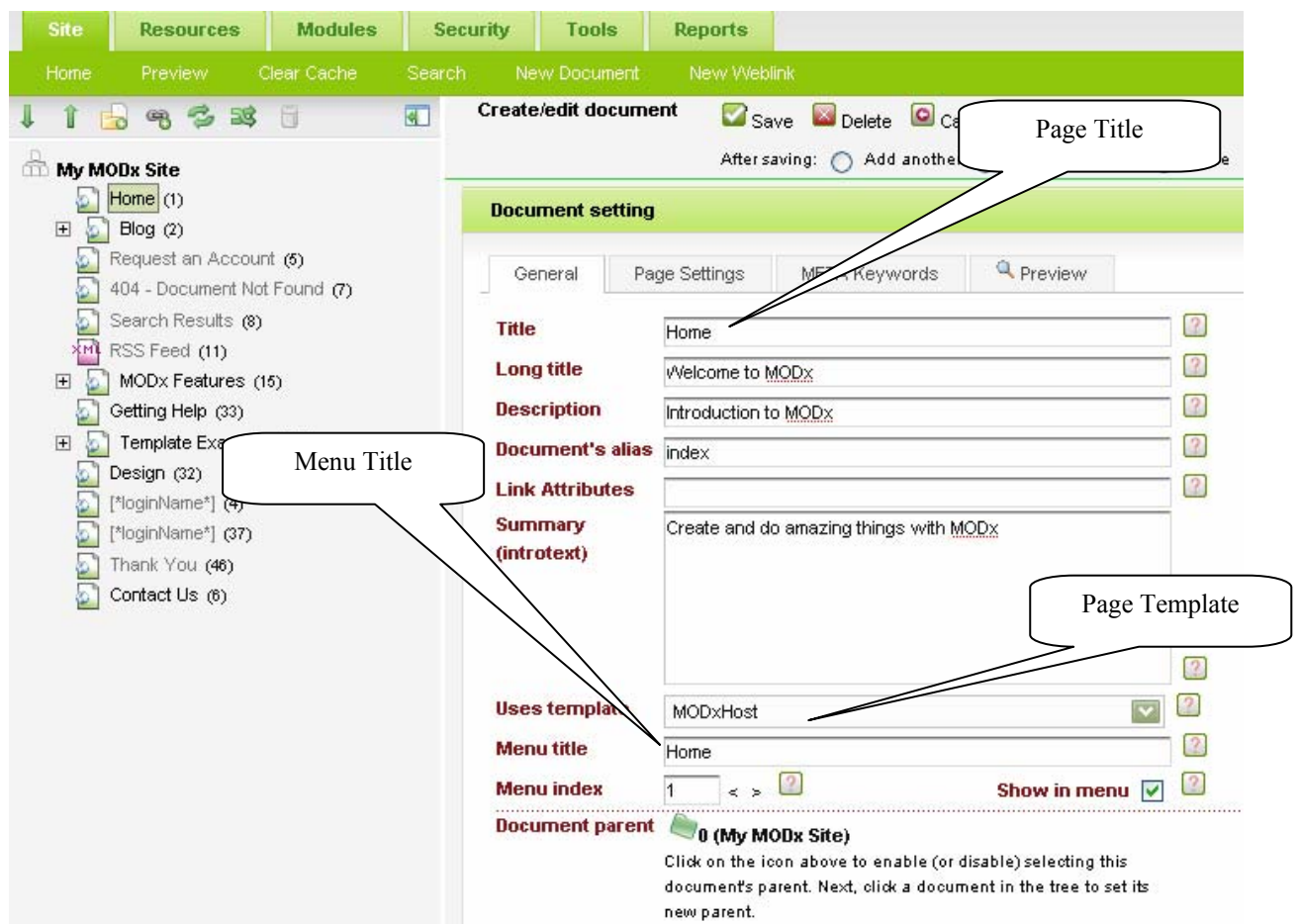


Figure 5 Edit Page

Templates

The CMS Manager currently offers a number of templates. A full description is available in Appendix B of the Reference Guide.

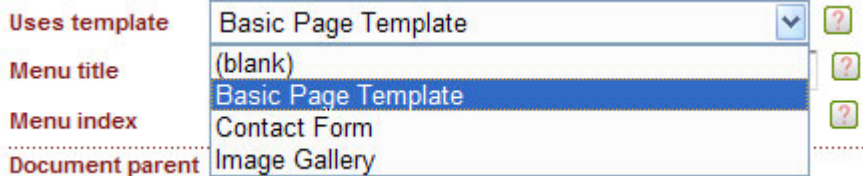



Figure 6 Templates

Creating the right Page Hierarchy

The Document Parent determines under which parent this page will appear. If this is a top level parent page will be set to . For any other level page you need to specify where you want the page to appear in the menu. To do this, click on the Parent Document folder and then click on the title of the parent page in the main menu. The parent page field will be updated.

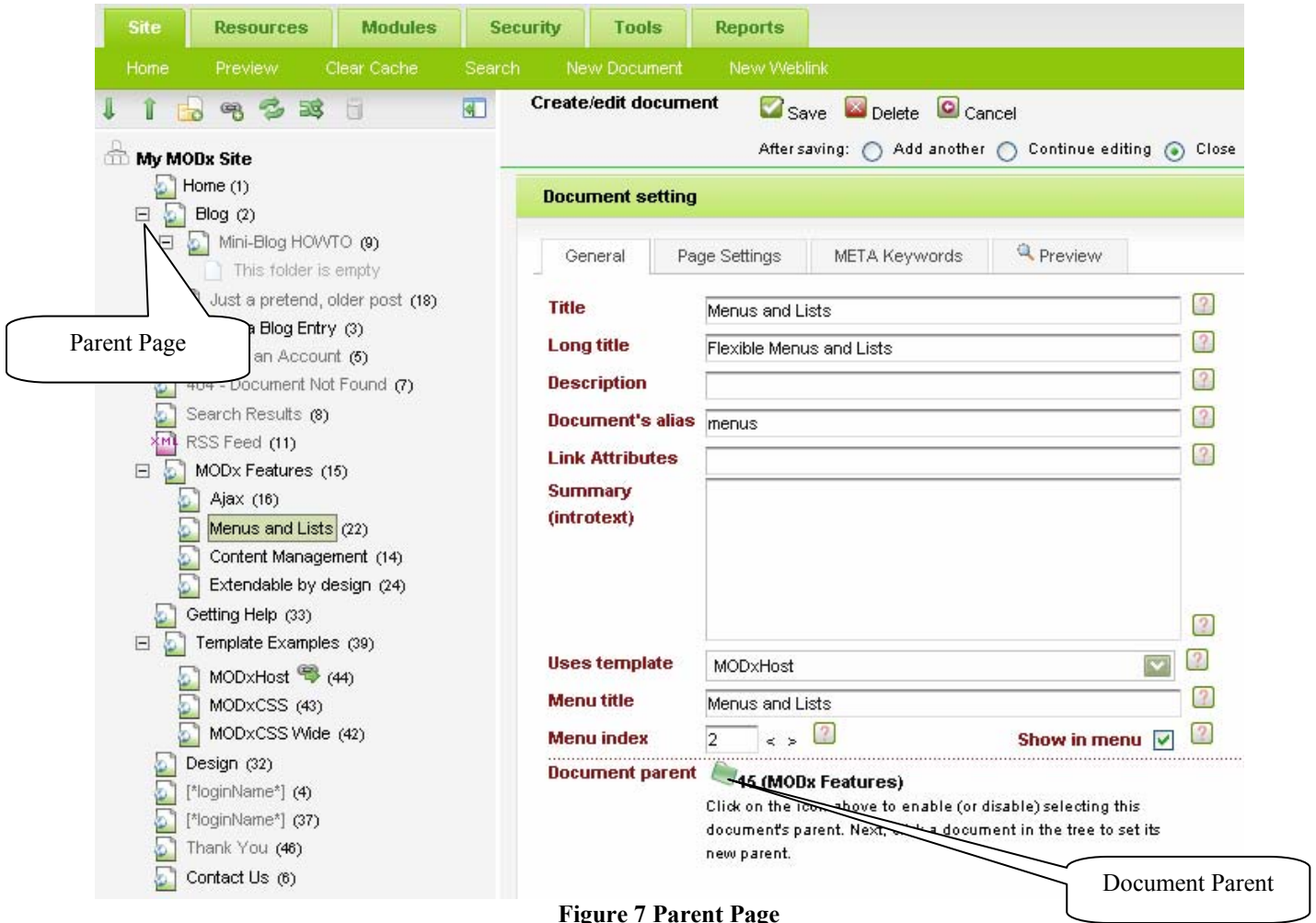


Figure 7 Parent Page

Editing Page Text

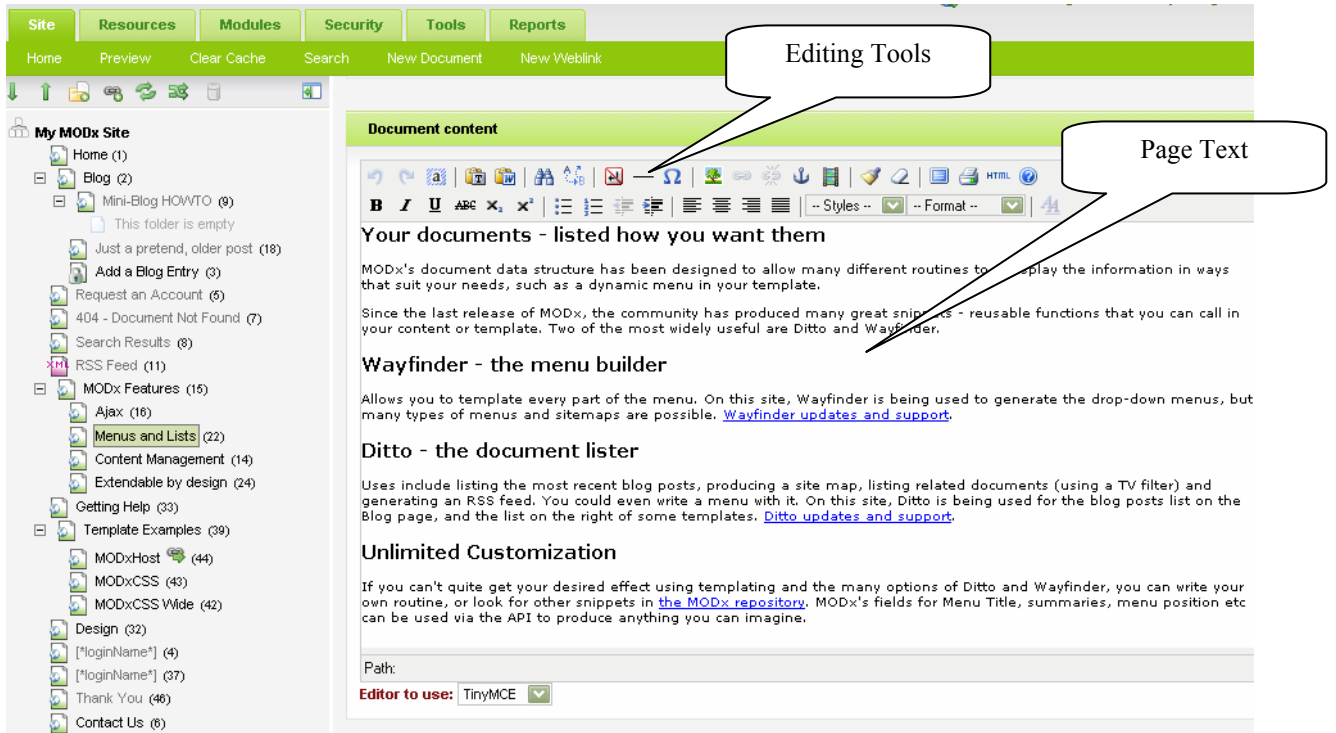


Figure 8 Edit Page Text

Enter the text for your page into the Document Content field using the editing tools to format the text. It is important to remember that the font and sizes for your site have been set elsewhere so that your site maintains a consistent look throughout.

Adding Page Images

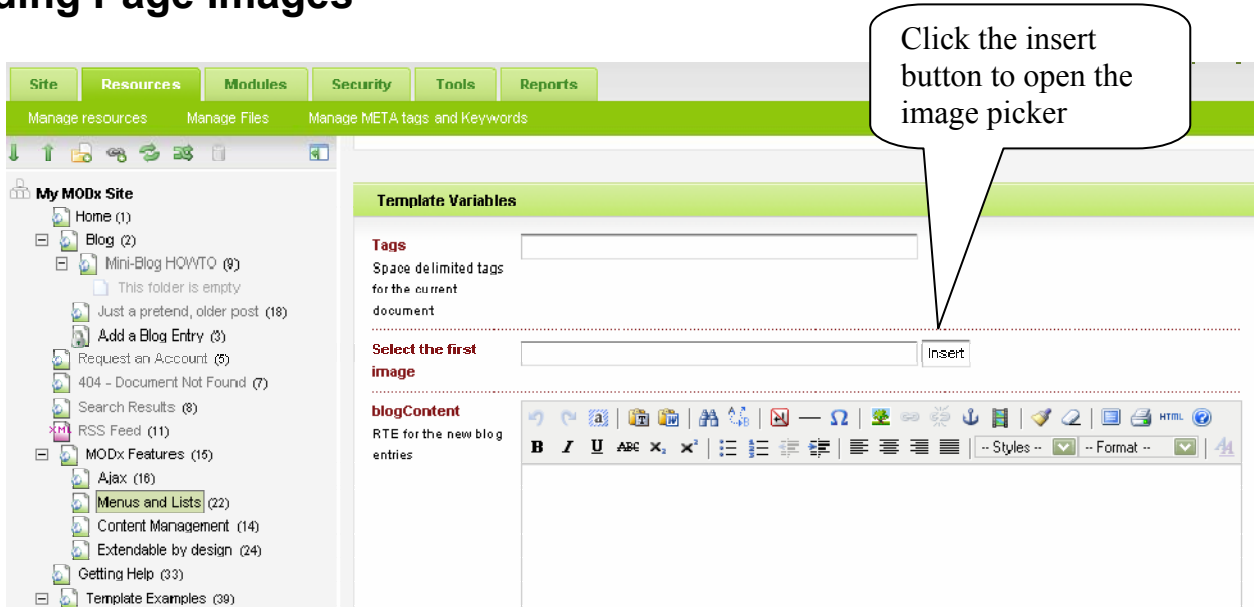


Figure 9 Inserting Images

By clicking the insert button alongside the image field you wish to update, the image picker shown in Figure 9 will open in a new window. Navigate through the folders to locate the appropriate image for the field selected.

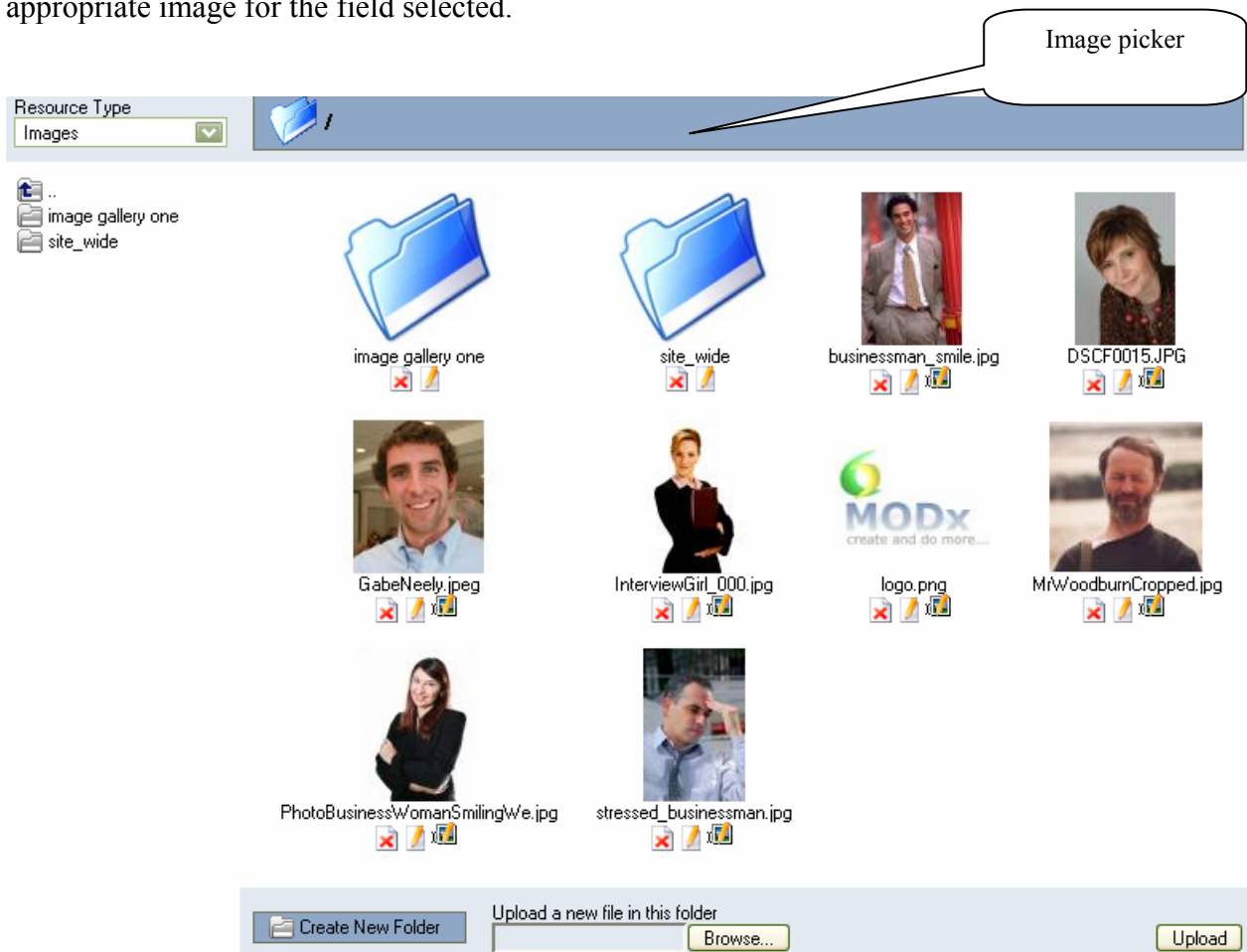


Figure 10 Image Picker

The right size and shape image should be selected for the page and image position you are updating.

Appendix A lists all the image sizes for your site.

Double click on the image you want to select to add to your page and the image picker will close and the image filename and file path will be added to the page.

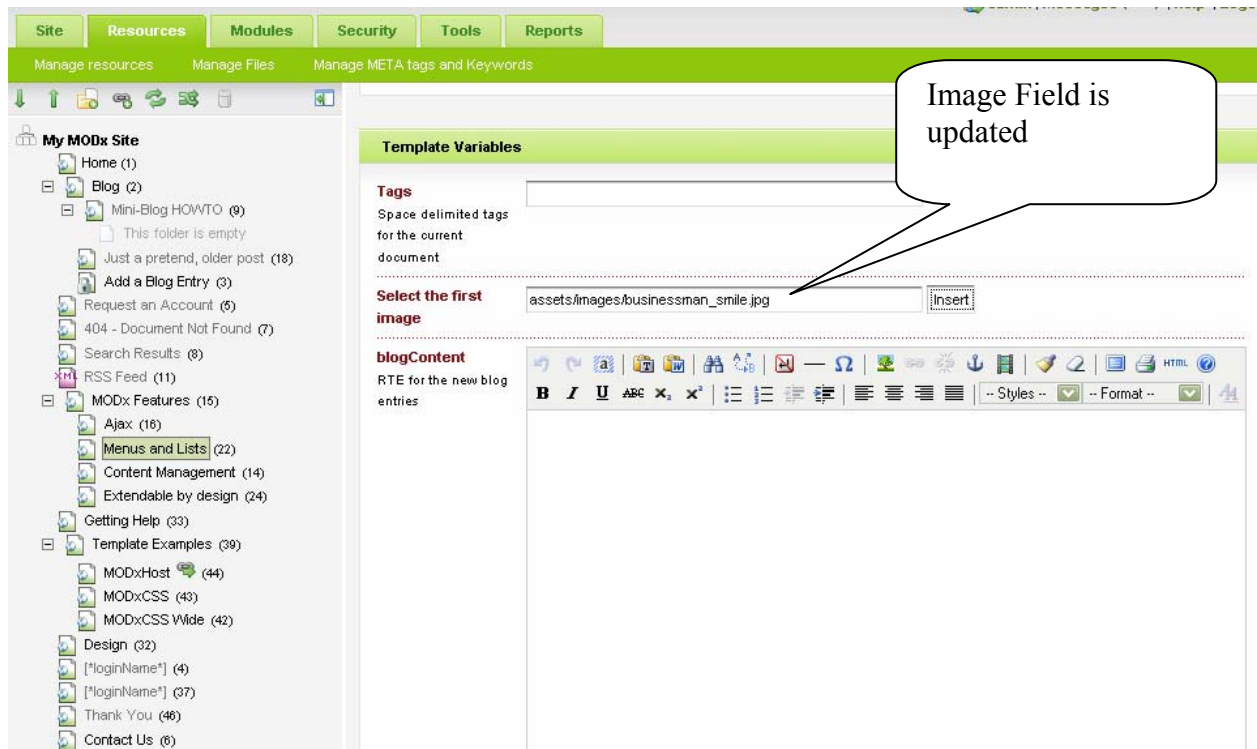


Figure 11 Image Field Updated

Creating the Right Page Style

One last item on the page that needs to be updated is the level in the tree that this page appears. Select Top Level for a Heading Page, Second Level for a second tier page and Third Level for a third tier page. This will determine the heading style used on the page.

Save the Document

Click Save to save your changes or Cancel to abort the changes you have made and return the page to its previous status.

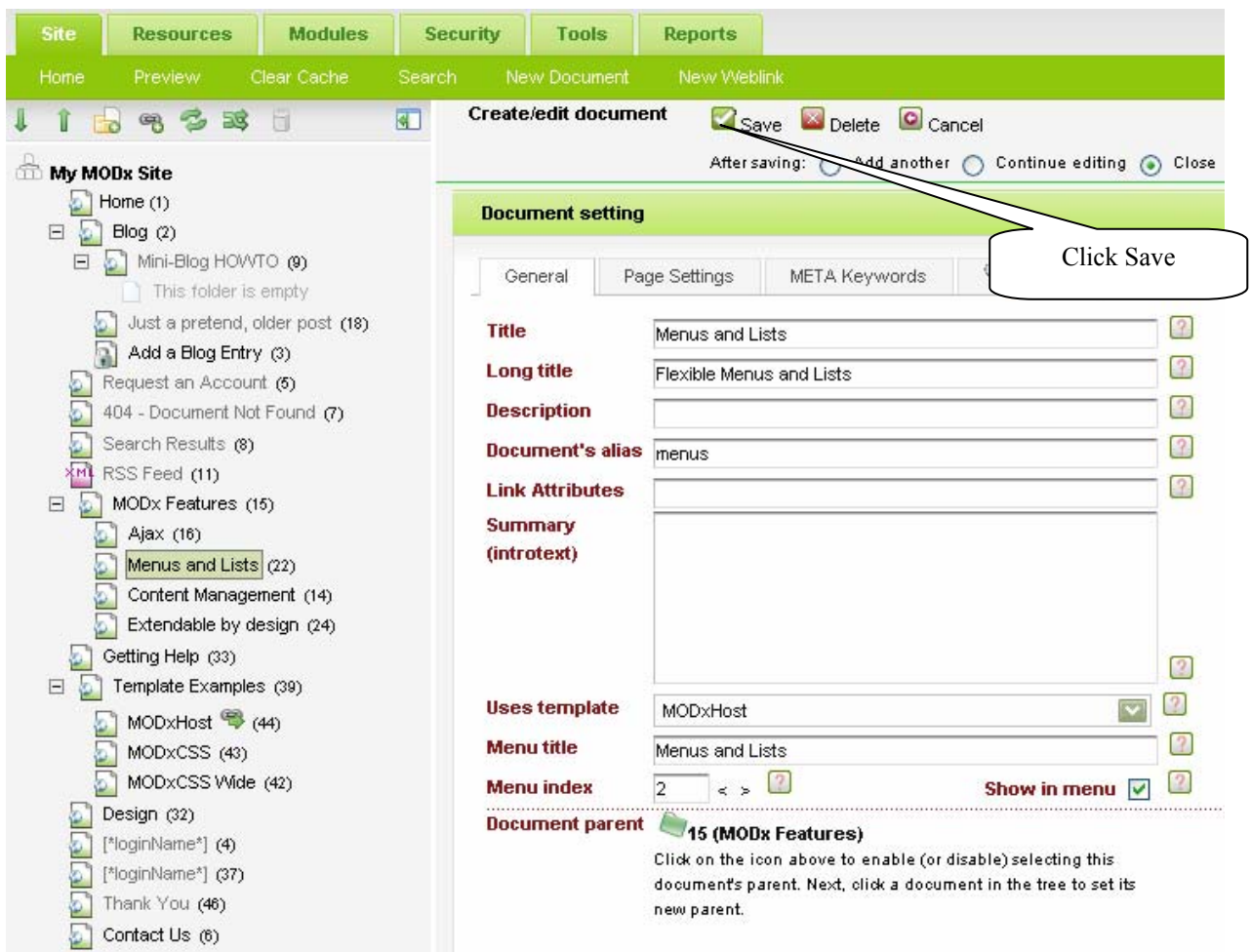


Figure 12 Save

Publishing a Page

Once your page is edited and saved it is ready for publishing. To publish a page click edit and then click on the Page Setting tab on the top of the page.

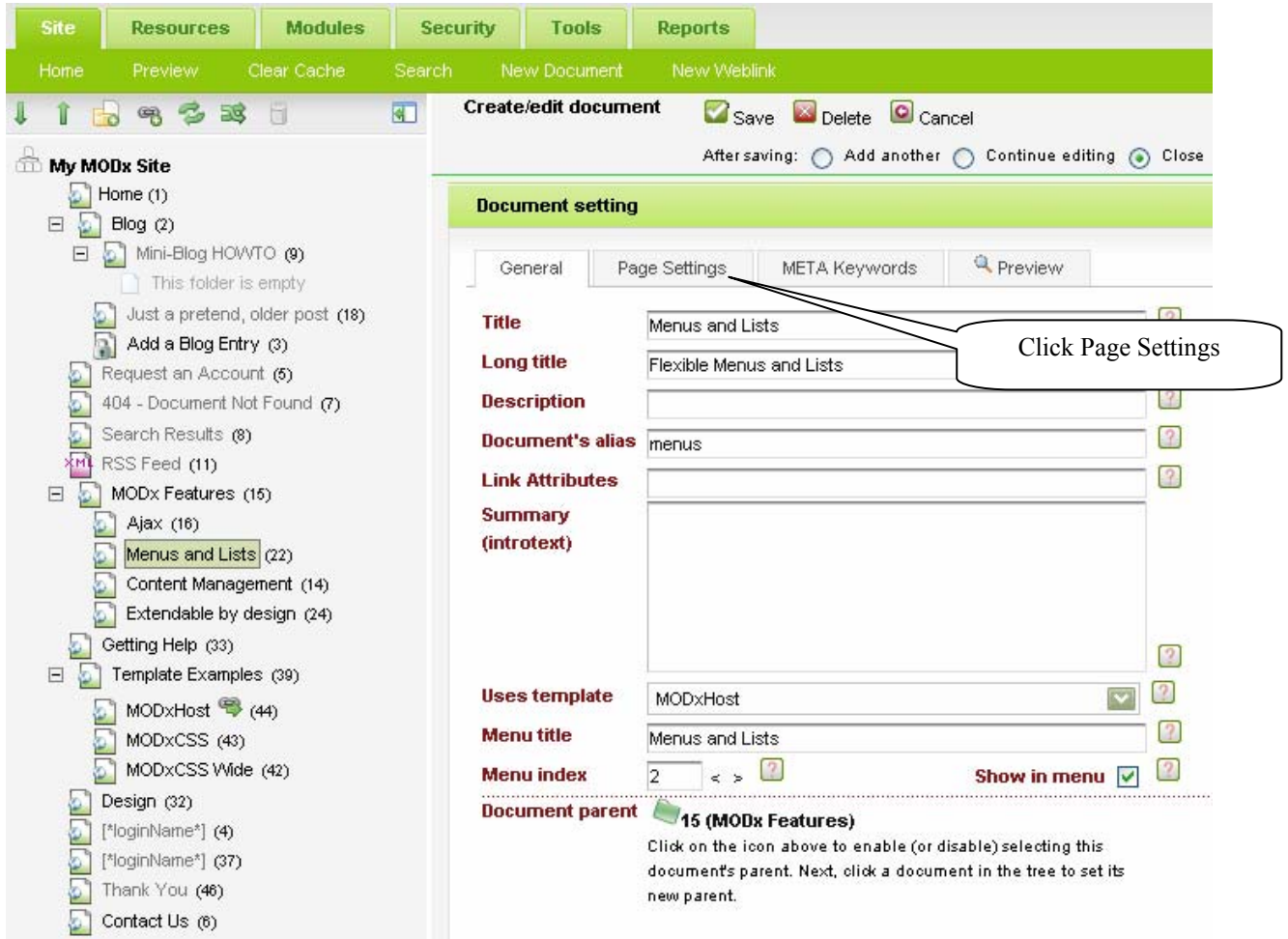


Figure 13 Page Settings

Tick the Published check box if you want the page to appear on the website immediately or to leave un-published leave the box unchecked.

The CMS Manager also allows you to set a date that you wish the page to appear on your site. For example, this may be useful in a situation where you may want a career opportunity to appear first thing on Monday or if you wish a page to become available after another the first of the next month.

Pages may also be marked up with an un-publish date. Pages will then cease to be visible on the web site once that deadline passes. An example where that may be useful could be where a career opportunity should only be available on the web site until a certain date.

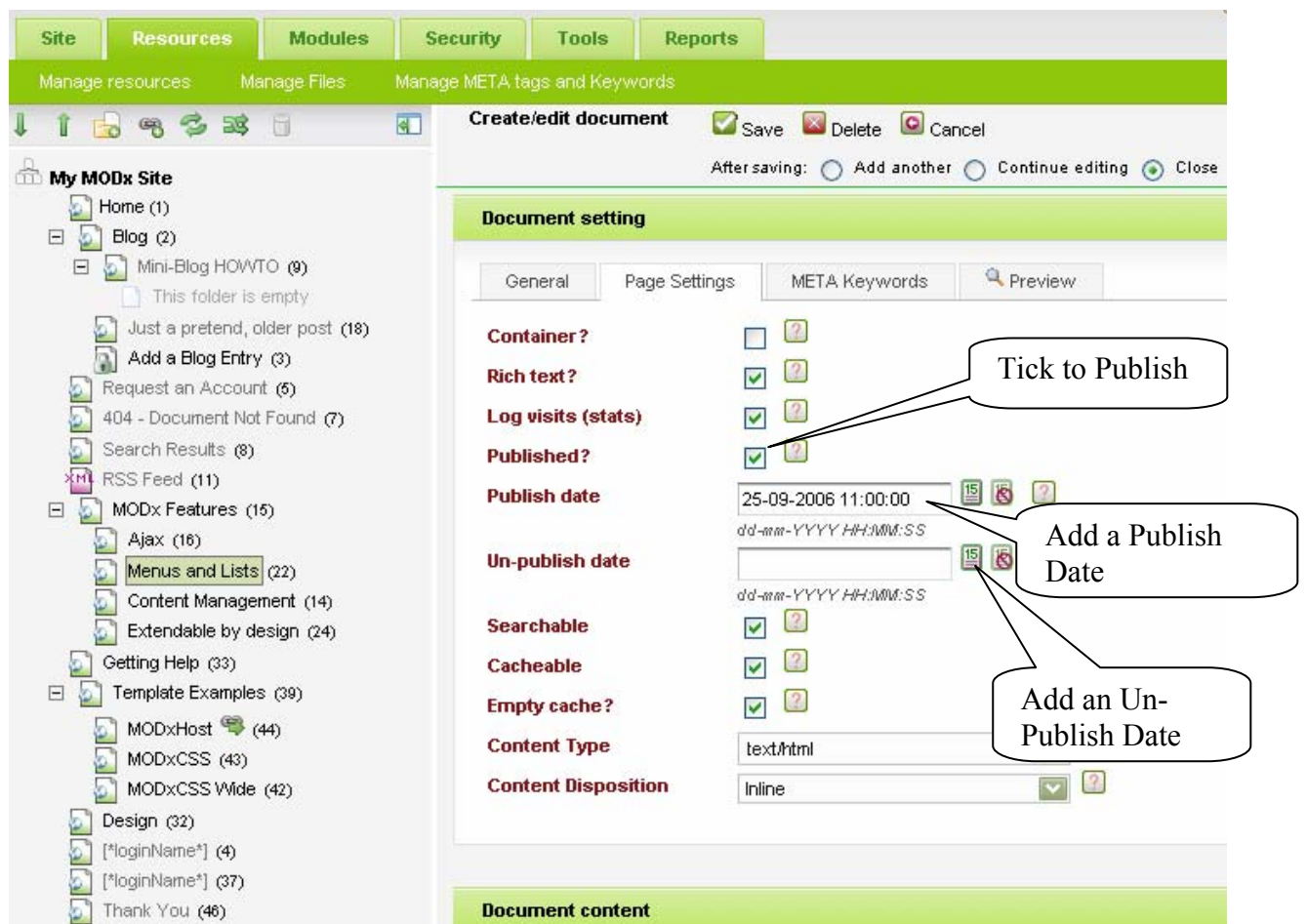


Figure 14 Publish

Sorting a Menu List

The CMS Manager provides a sorting tool to enable you to easily order and re-order the pages in a menu or within a submenu. To use this tool click on Modules in the top green tab menu, then Doc Manager in the solid green menu and Sort Menu Items on the main screen tab.

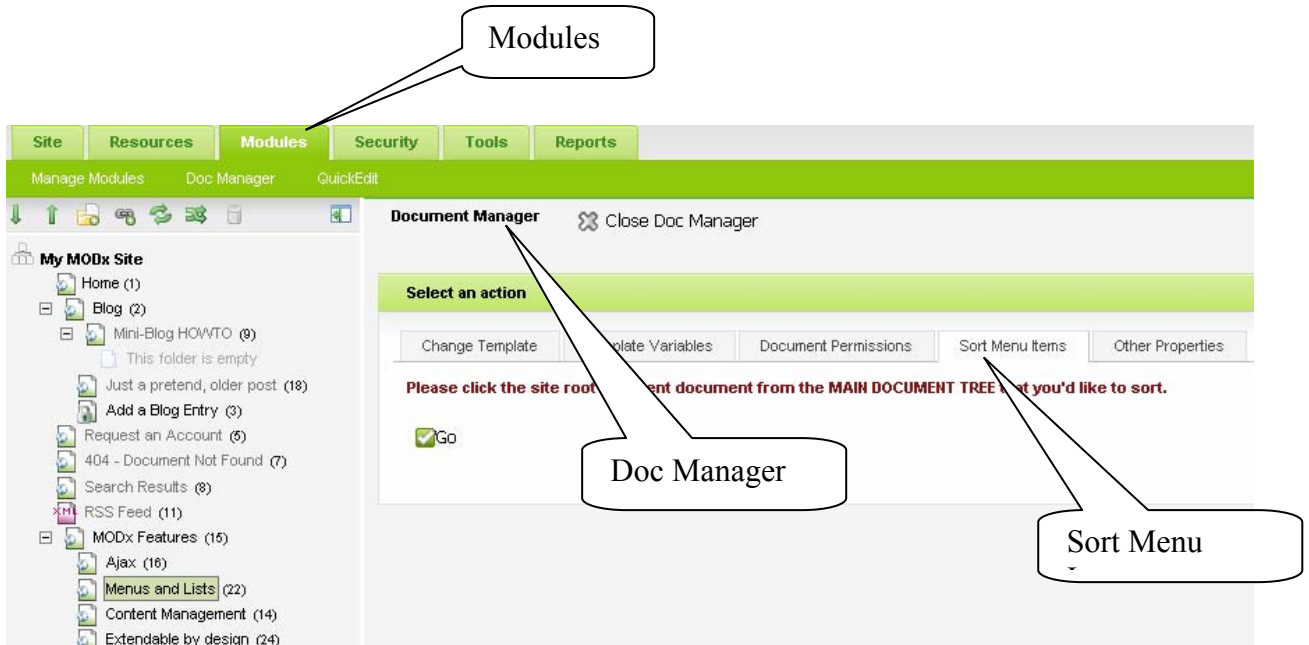


Figure 15 Sort Tool

Once you are in the Sort Menu Tool, click on the parent menu item you wish to have sorted. For example clicking on About the School , then click Go.



Figure 16 Sort Sub-menu

The child items of the selected parent page will be listed and are available to be moved and re-ordered using your cursor.

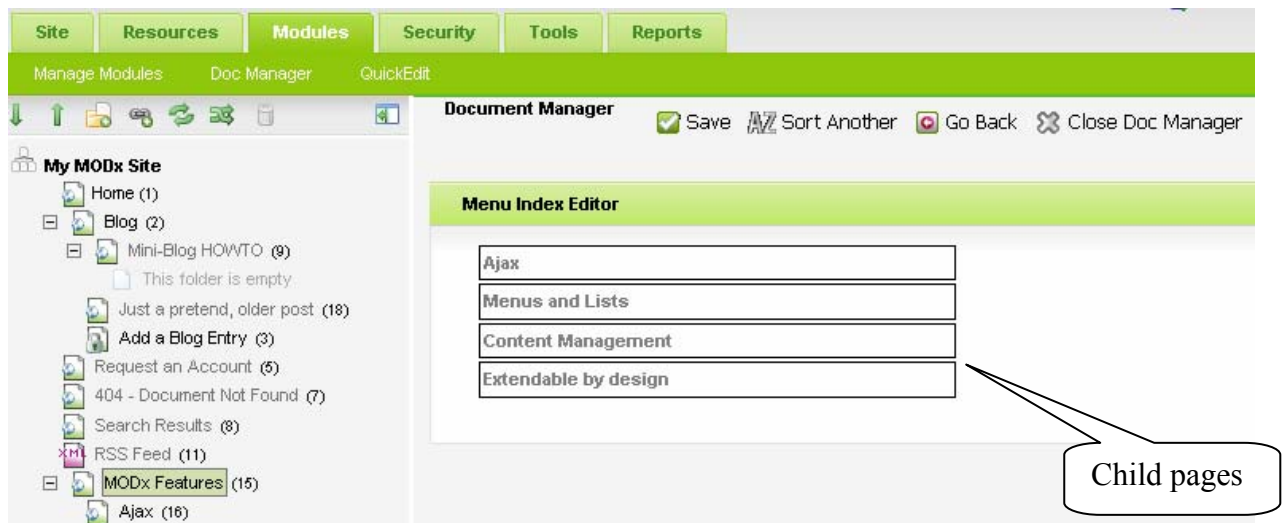


Figure 17 Create Sort Order

Creating new pages

To create a new page on your web site, click on the New Document icon in the top left tool bar.

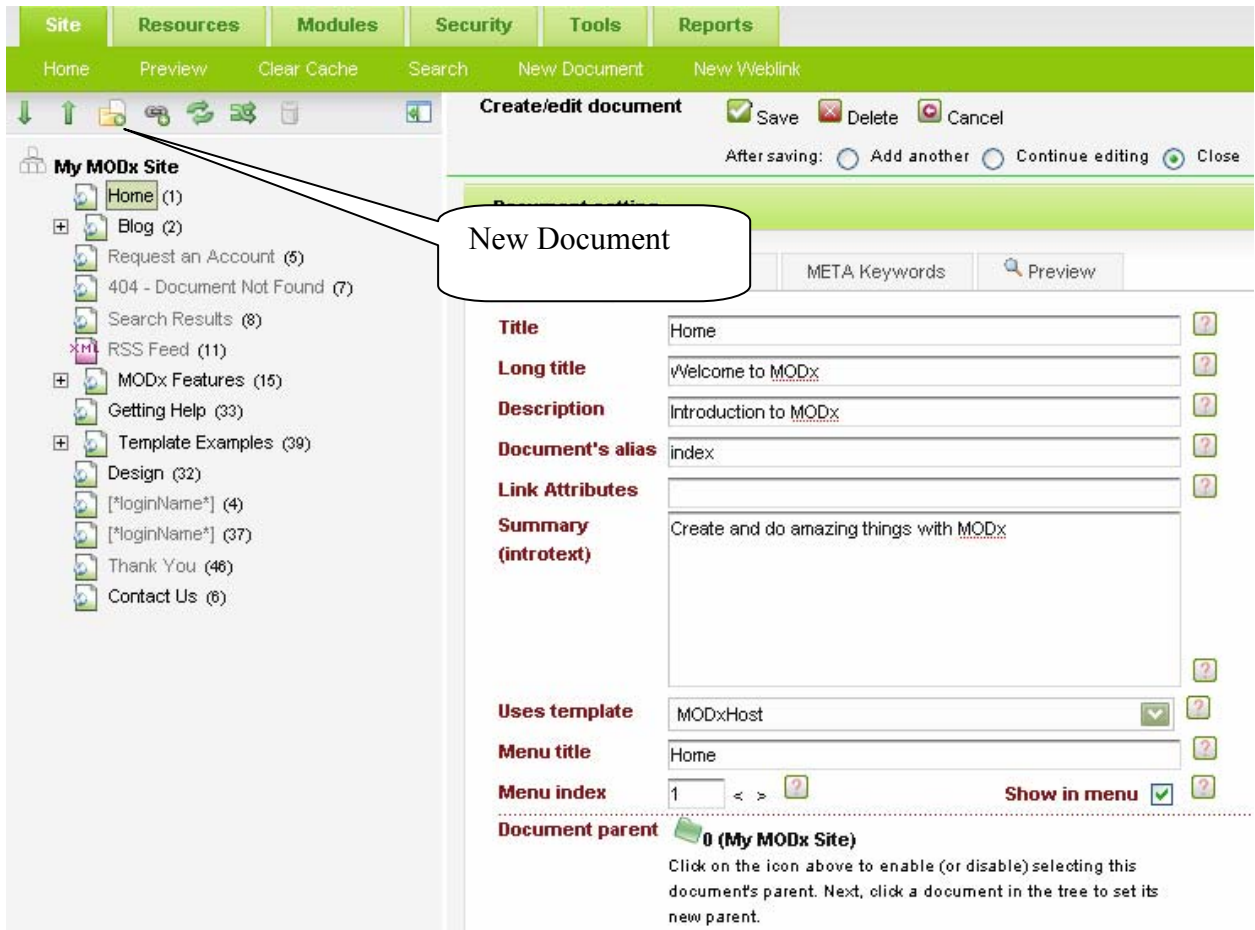


Figure 18 Create a New Document

You will be presented with a new document to edit. This is the same as editing an existing document. The necessary pieces of information in this section are the Page Title, Long Title, The Page Template. If you should you want to add the page to your menu you will need to enter the Menu Title and the Menu checkbox. The Title is used to identify the page in the Manager, The Long Title is used as the Title on the Page, and the Menu Title is used as the menu label in the side navigation. It is helpful if all three match.

The other fields are optional and may be completed if required. We will discuss Link Attributes in a later section.

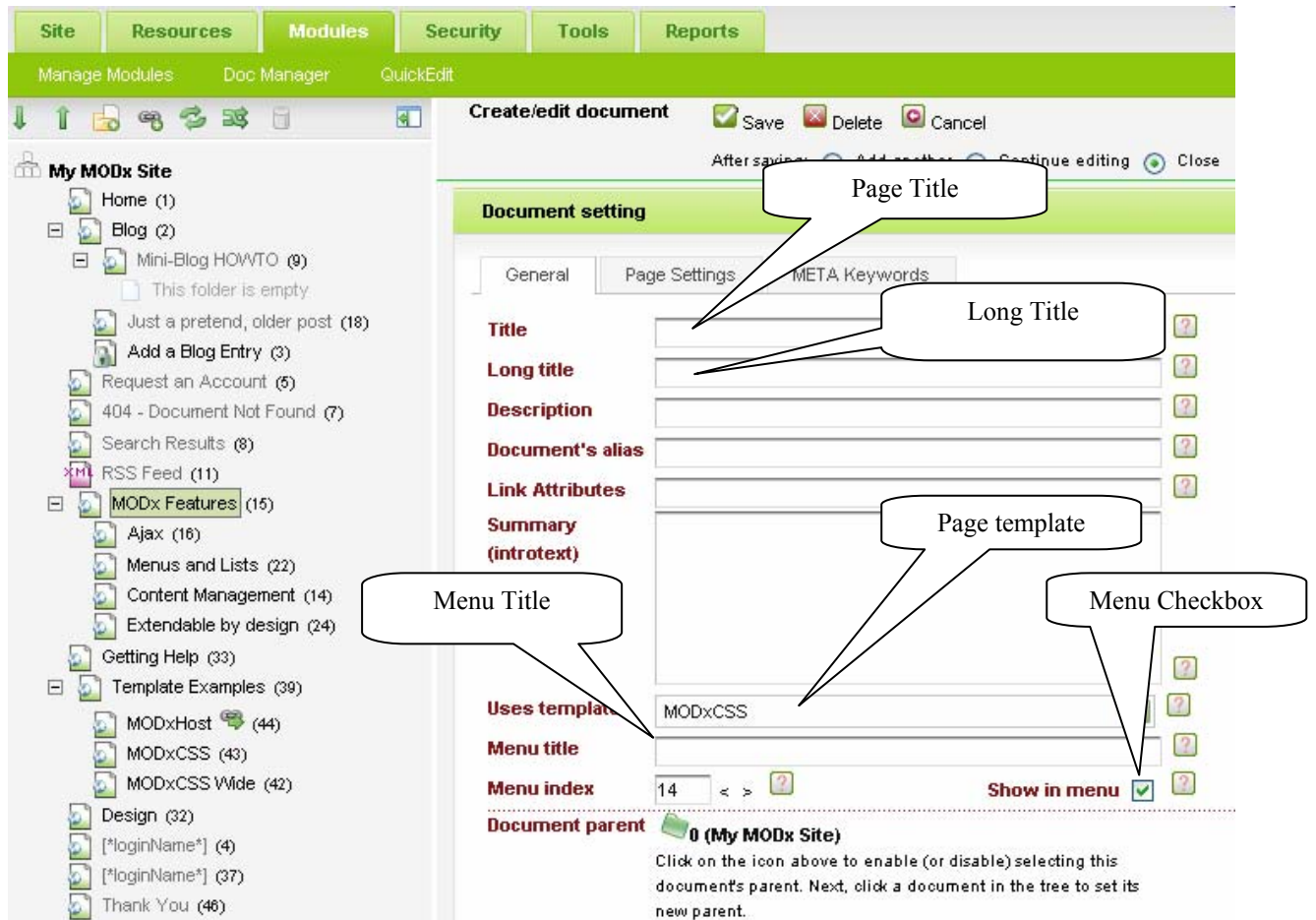


Figure 19 Completing a New Document

Templates

The Basic Page Template has been set as the default template selected. The CMS Manager offers a number of different templates. The template descriptions and their uses are listed in Appendix B. Select the template that best suits the page you are creating. Figure 20 shows the templates available on this site.

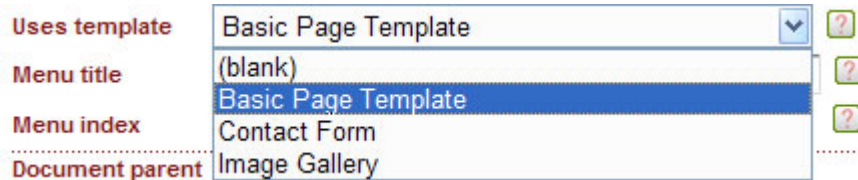



Figure 20 Template Drop Down List

Creating the Right Page Hierarchy

The Document Parent field setting determines where in the menu structure the page will appear. These pages are important in determining the menu structure.

To specify where in the menu the page will appear, click on the Parent Document folder icon  and then click on the title of the Parent Page in the main menu. This will update the Parent Page field accordingly.

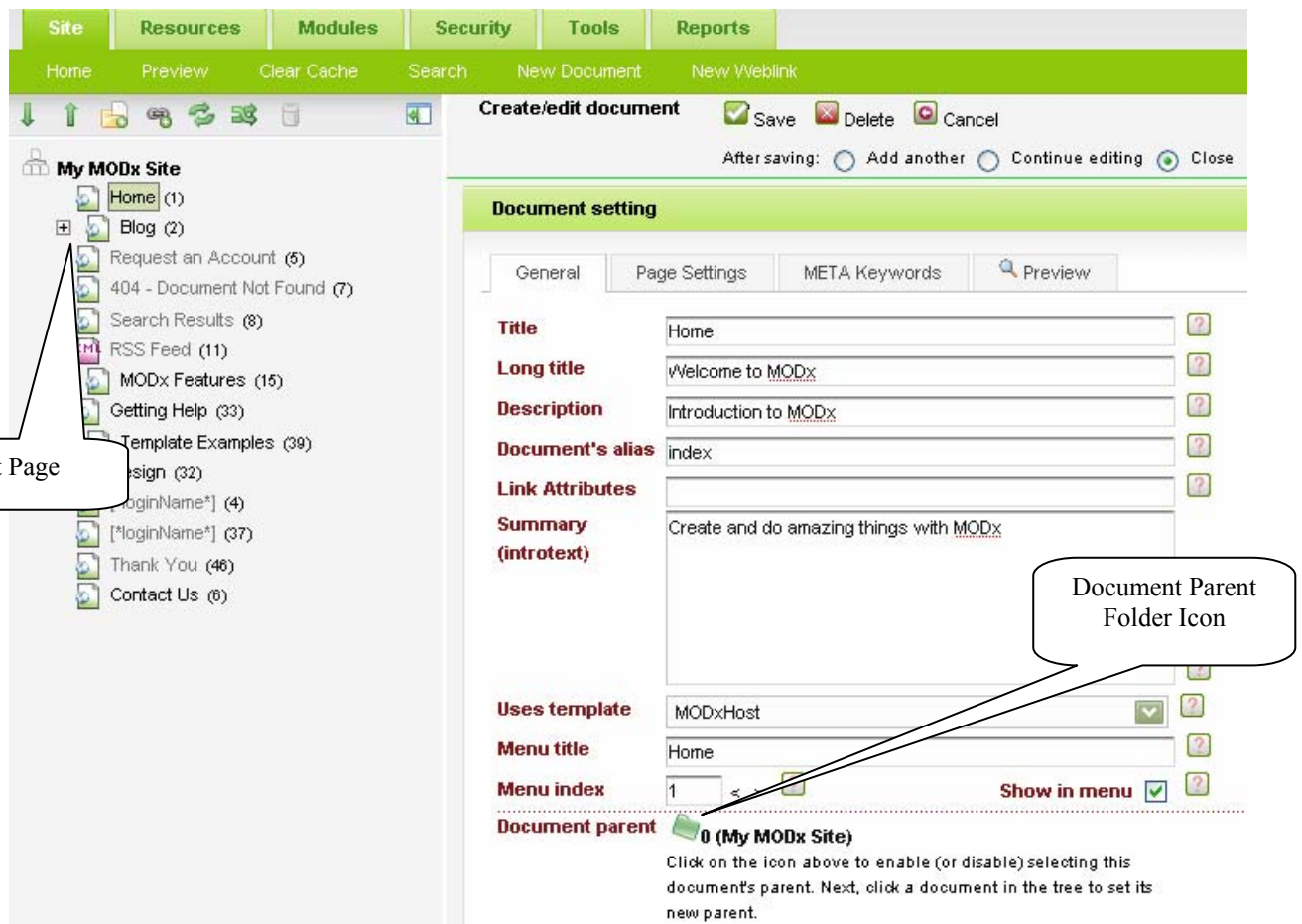


Figure 21 Page Hierarchy

Completing Template Variables

The items that appear on the page are called page variables. These variables consist mainly of images and text fields. Each template will have a specific set of variables. Each determines the look and feel of the resulting page and the content that will appear. How to complete each of these fields is covered in depth in the sections on Editing a Document.

Enter the Copy for the page in the Document Content Field.

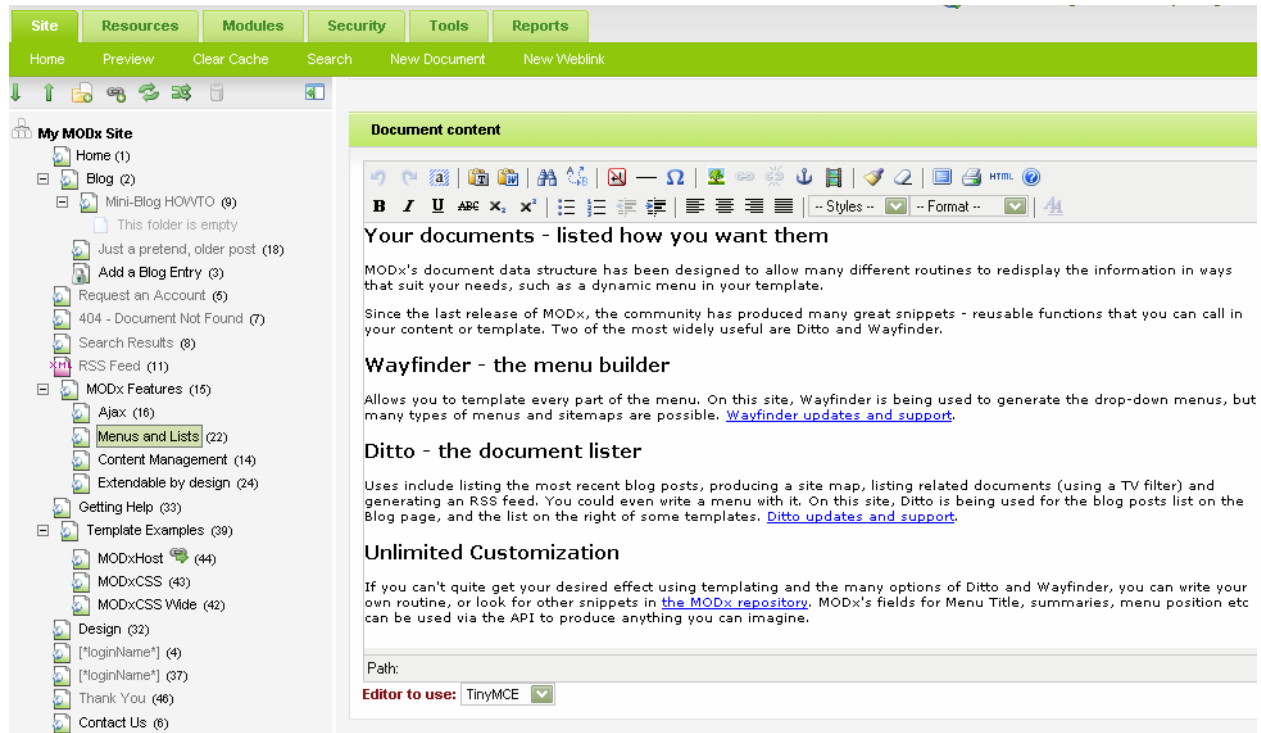


Figure 22 Enter Document Content

Publishing a Page

Once your page is edited and saved it is ready for publishing. To publish a page click edit and then click on the Page Setting tab on the top of the page.

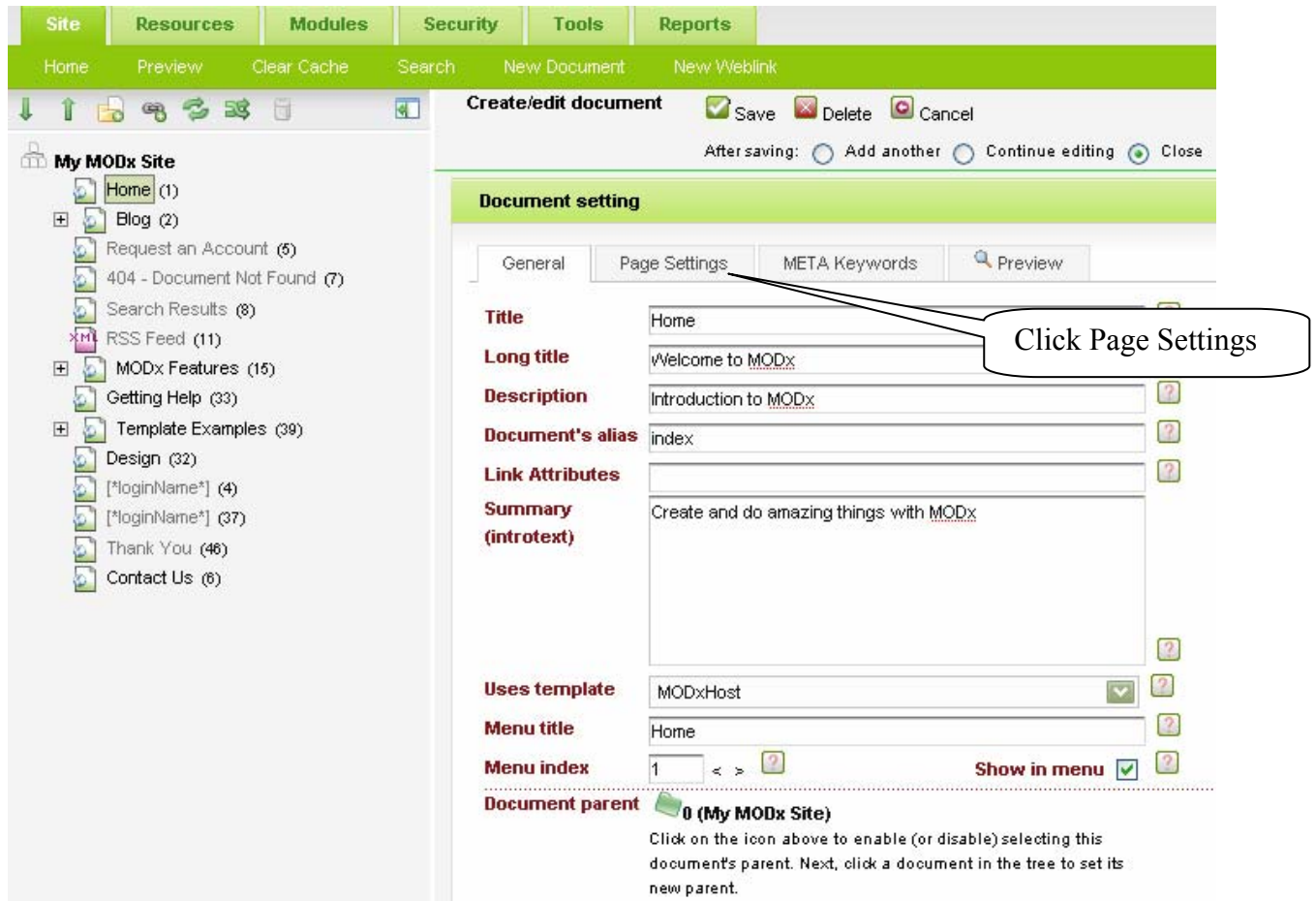


Figure 23 Page Settings

Tick the Published check box if you want the page to appear on the website immediately or to leave un-published leave the box unchecked.

The CMS Manager also allows you to set a date that you wish the page to appear on your site. For example, this may be useful in a situation where you may want a career opportunity to appear first thing on Monday or if you wish a page to become available after another the first of the next month.

Pages may also be marked up with an un-publish date. Pages will then cease being visible on the web site once that deadline passes. An example where that may be useful could be where a career opportunity should only be available on the web site until a certain date.

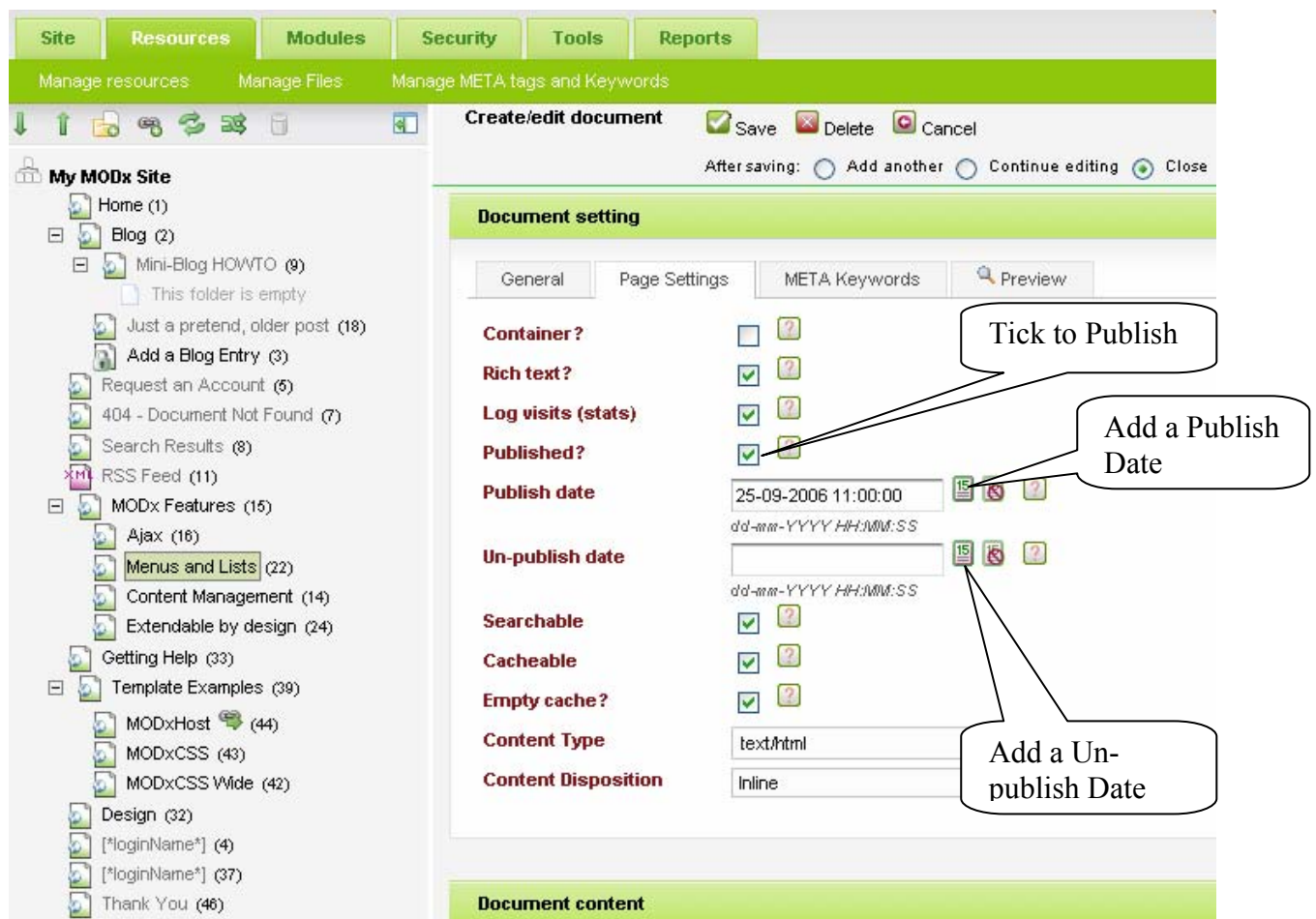


Figure 24 Publish the page

Duplicating Pages and Sections

Pages can be created as a new document or a page can be created as a duplicate of an existing page. The Duplicate function creates an exact copy of the original with a name 'Duplicate of' the original page name and a new page identification number. The Duplicate function also raises many issues you need to be aware of before using the duplicate function.

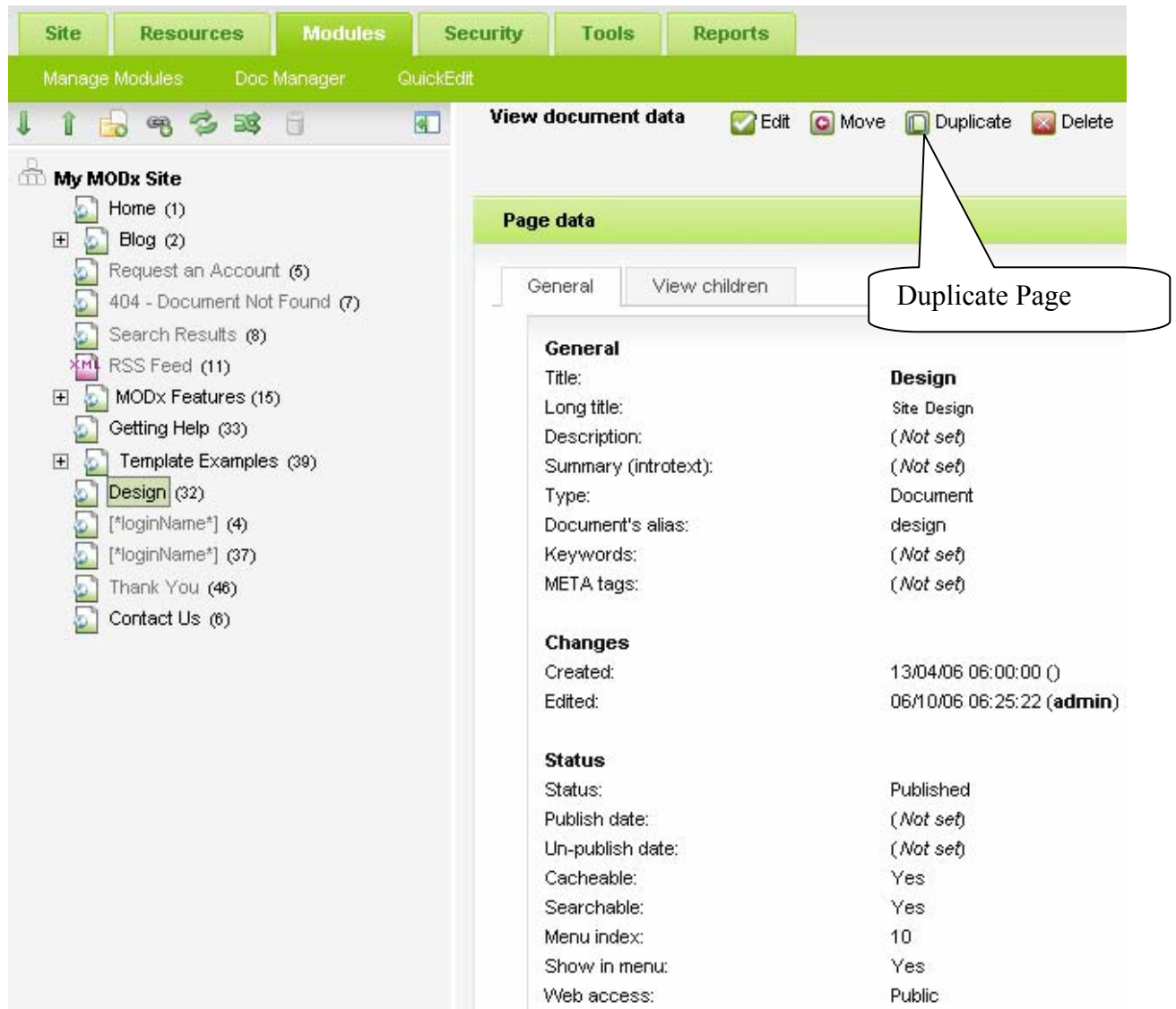


Figure 25 Duplicate Page

Firstly, if the original document is published, the new page will also be published automatically. Secondly if the original page has any child pages then the same page structure will be created for the duplicate page. That is to say if the original page has 10 child pages, the new duplicate page will be created with 10 child pages.

This function is however the quickest and easiest way to create a complicated page or group of pages that is similar to an existing page.

Remember to un-publish these new pages until they are updated and ready for your site as they will be published if your original page was published. See Figure 29

To duplicate a page open the page to be copied in the summary view, then click the Duplicate icon from the top document menu.

The page can then be edited by clicking the edit icon.

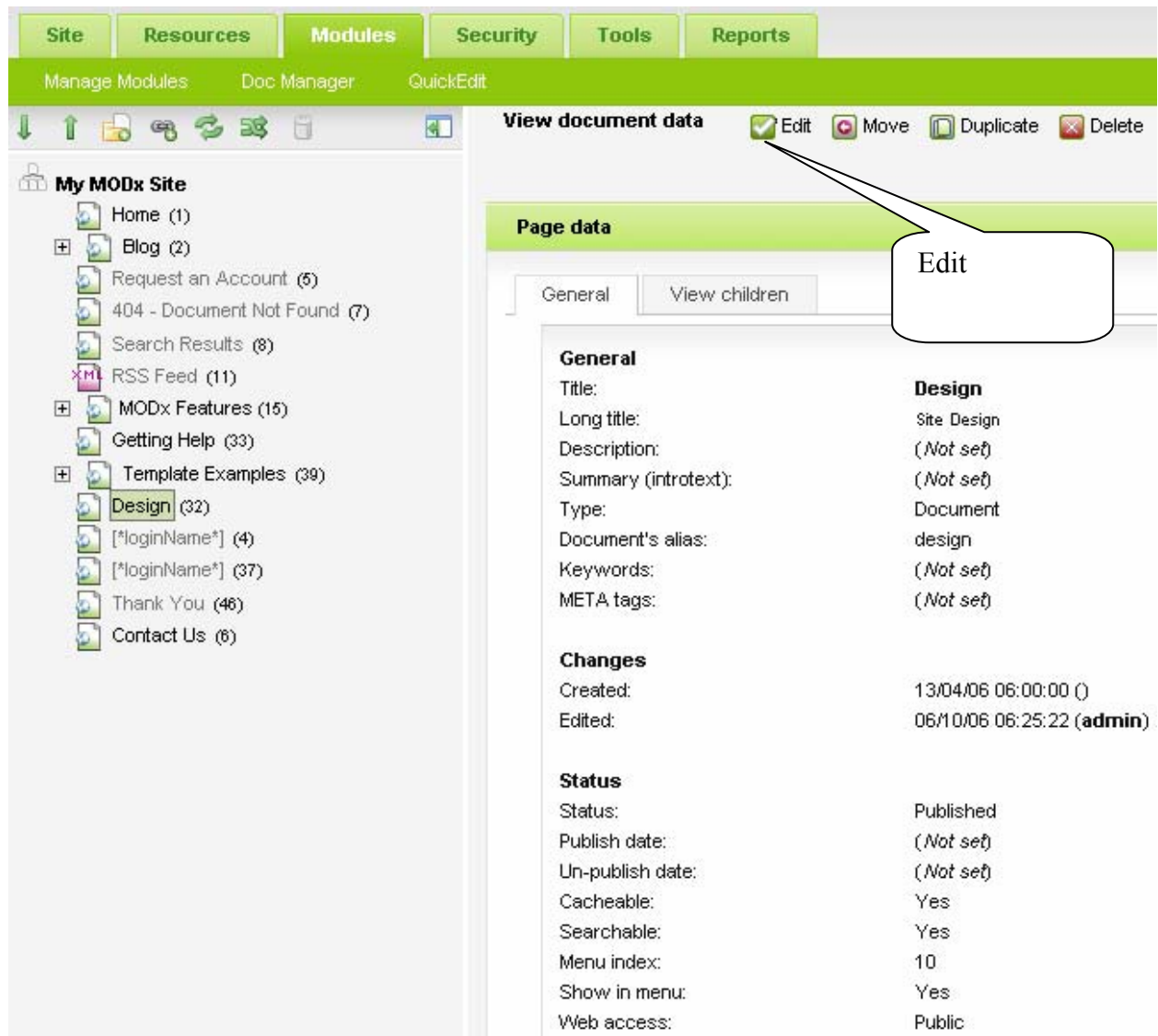


Figure 26 Duplicated Page

Adding Linked Pages

Pages can be linked to other pages within the site or to pages on another website or a resource such as an image or file on the Internet. Figure 27 shows an example of a linked page.

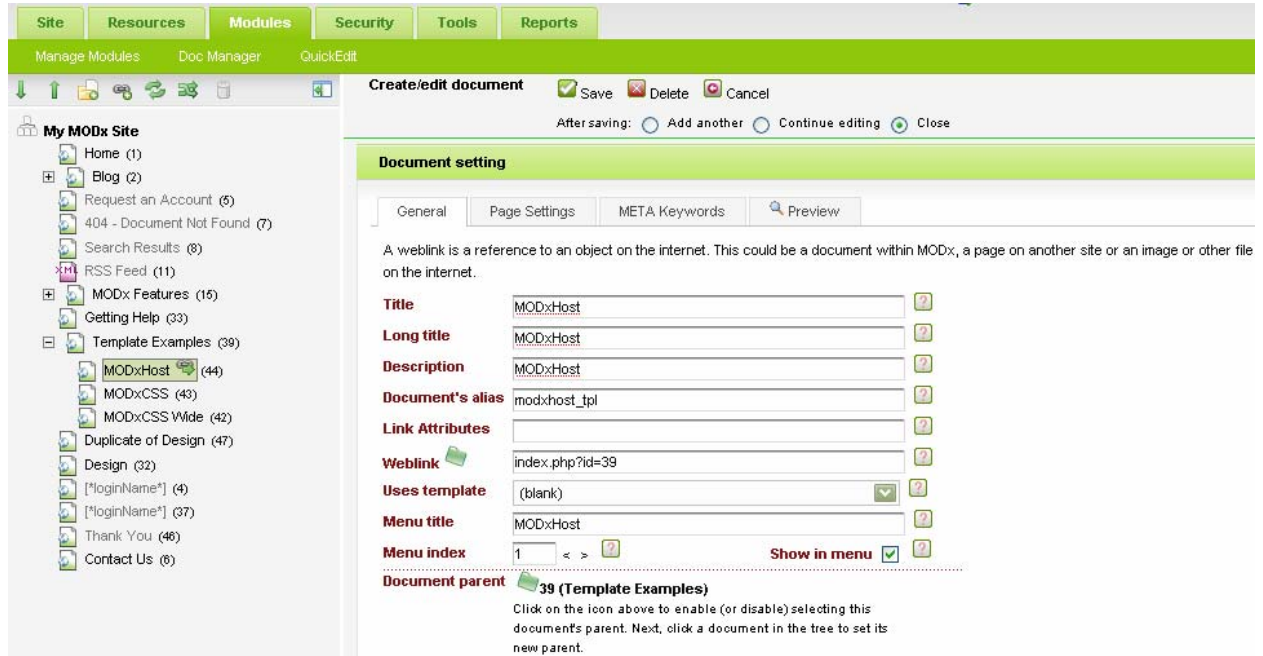


Figure 27 Web link Page

A linked page is essentially a pointer to another page. Instead of recreating a page that already exists either on your site or on another part of the internet, you simply point to that page. This allows you to incorporate resources into your site without the need to update them in multiple places.

The page can be linked to an external site, or to a page within your site (you would enter the identification number of the original page into the Weblink field). If the original page changes, you only need to update the page with the original id, not both pages. The linked page simply points to the original page and therefore reflects the updates automatically.

To create a linked page, click on the New Weblink icon as shown in Figure 28.

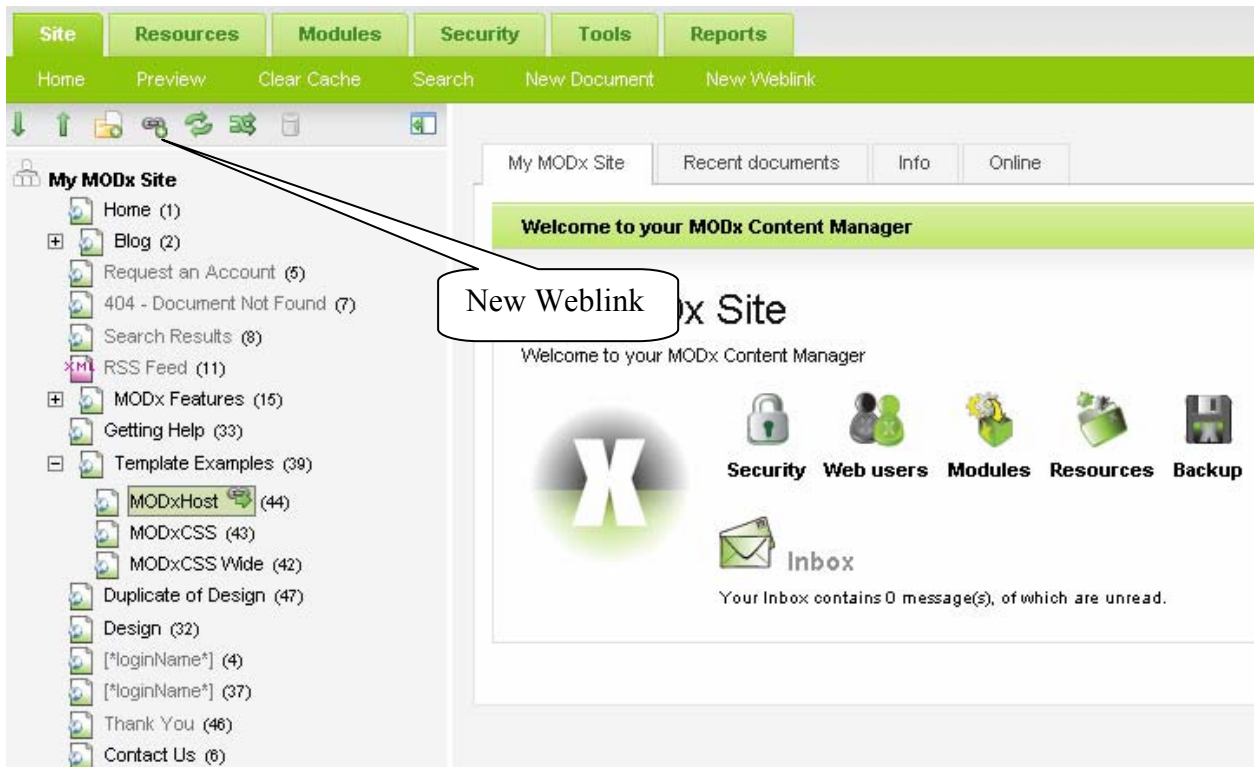


Figure 28 Create a New Weblink Page

A page will be created. Enter a Page Title, and then enter the link you wish to the new page to use as its content. If you are linking to a page within the same site, enter the number of the page id. If you are linking to a resource outside of the site, enter the web address (URL) of the site you wish to use.

Next change the template to unselect any default template by selecting (blank) from the template drop down list.

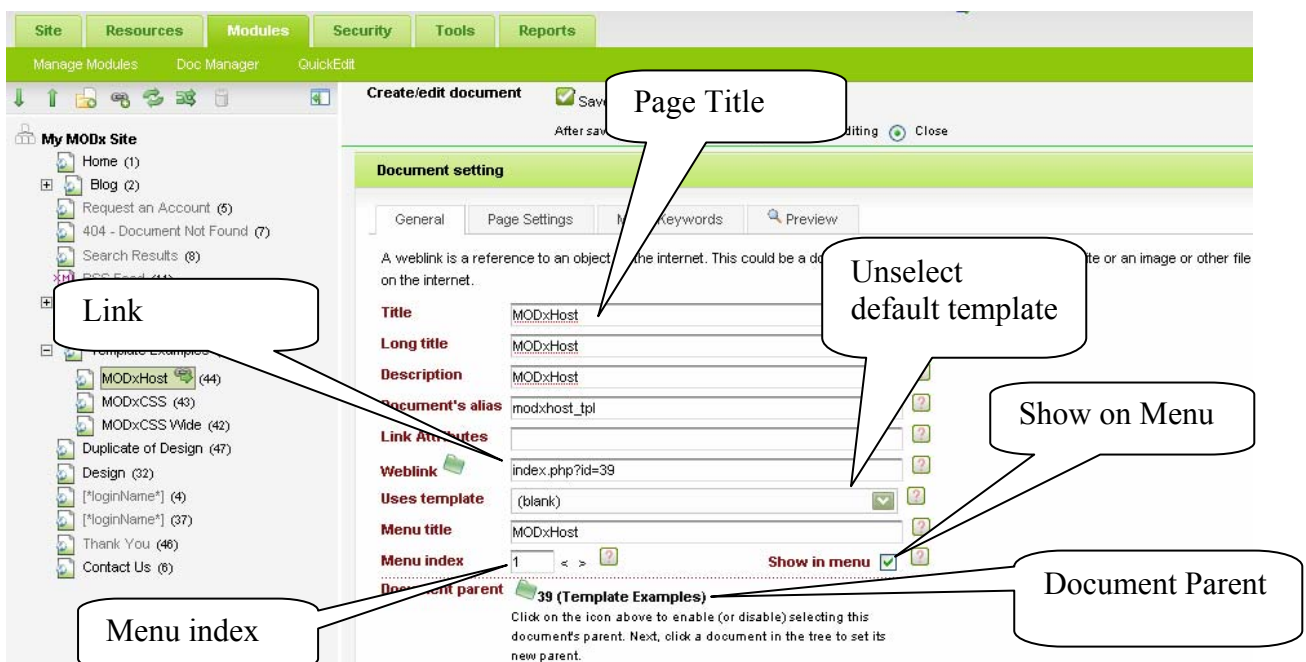


Figure 29 New Weblink Page

Update the menu index and parent document as you would for any other document.

The page will need to be published as would any other page before it becomes visible on the site.

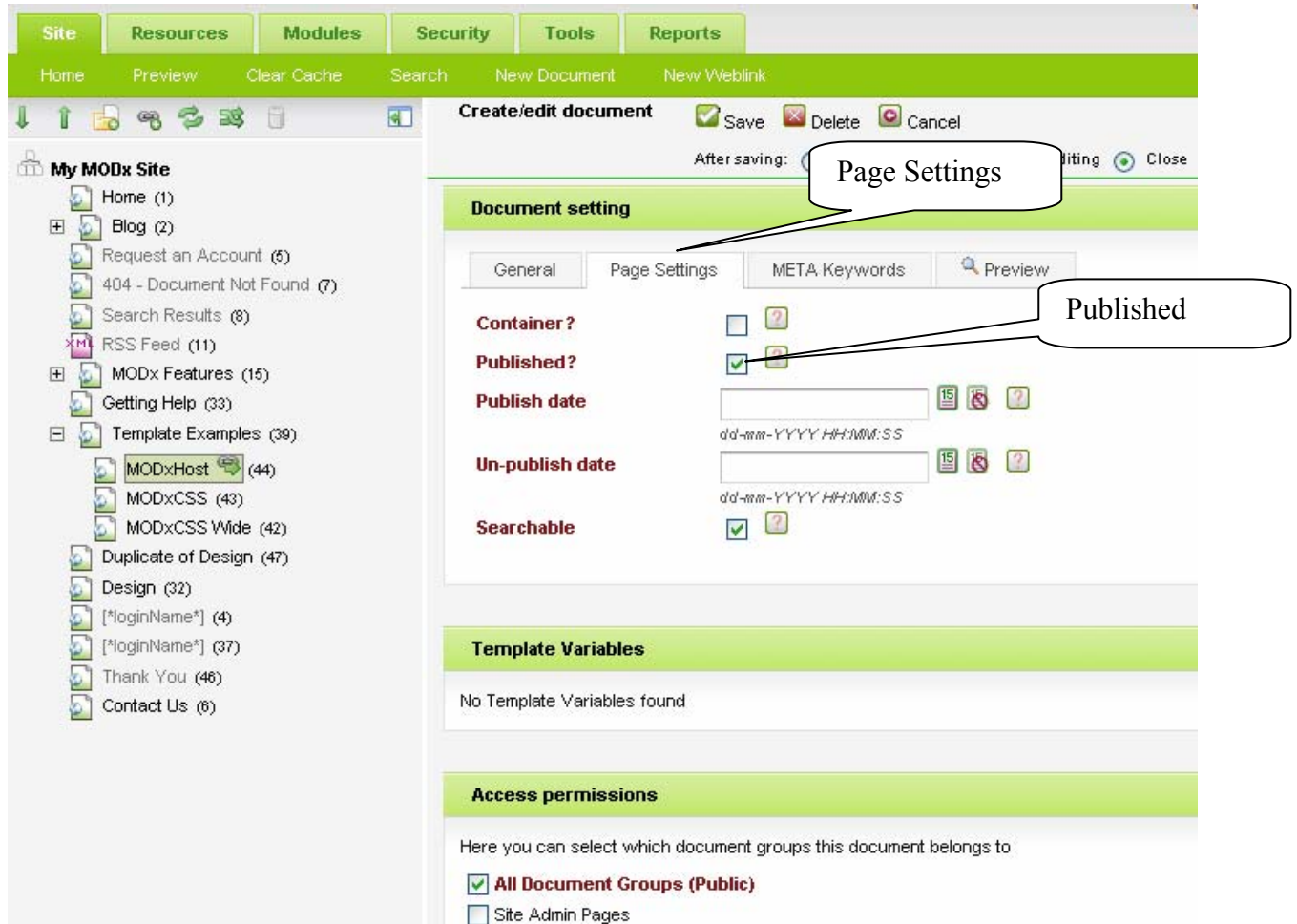


Figure 30 Publish Your Weblink Page

You need to click save as always to save your changes.

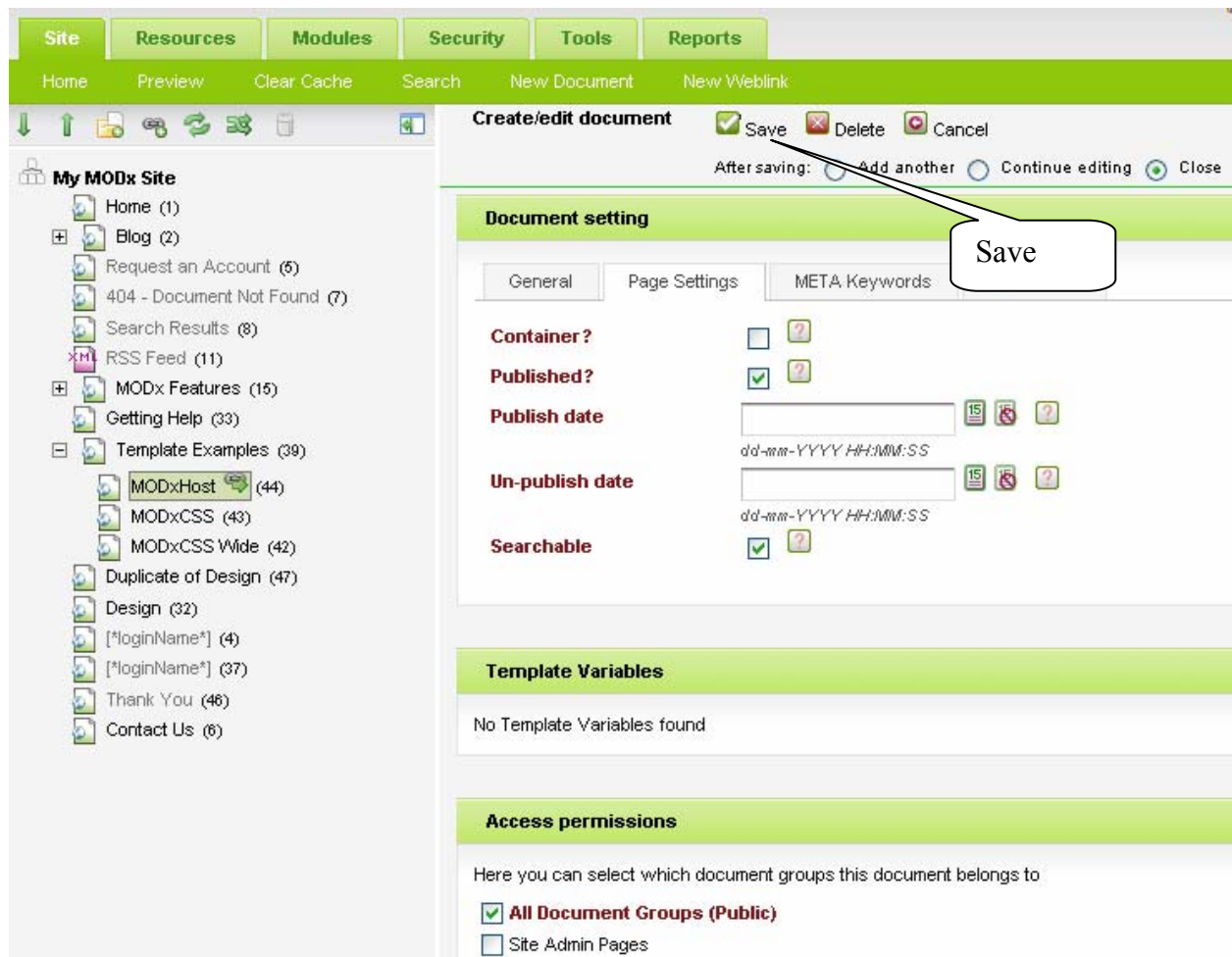


Figure 31 Save Your Changes

Preview

Page Preview

When you have finished creating your page, and saved it, you have the option to preview the page. Click preview tab on the Document Settings tool bar. The last saved changes will appear on the main screen.

Any saved page may be previewed in this way, this includes both published and un-published pages and normal and web link pages. This feature can be very helpful if pages need to be approved before being published to your site.

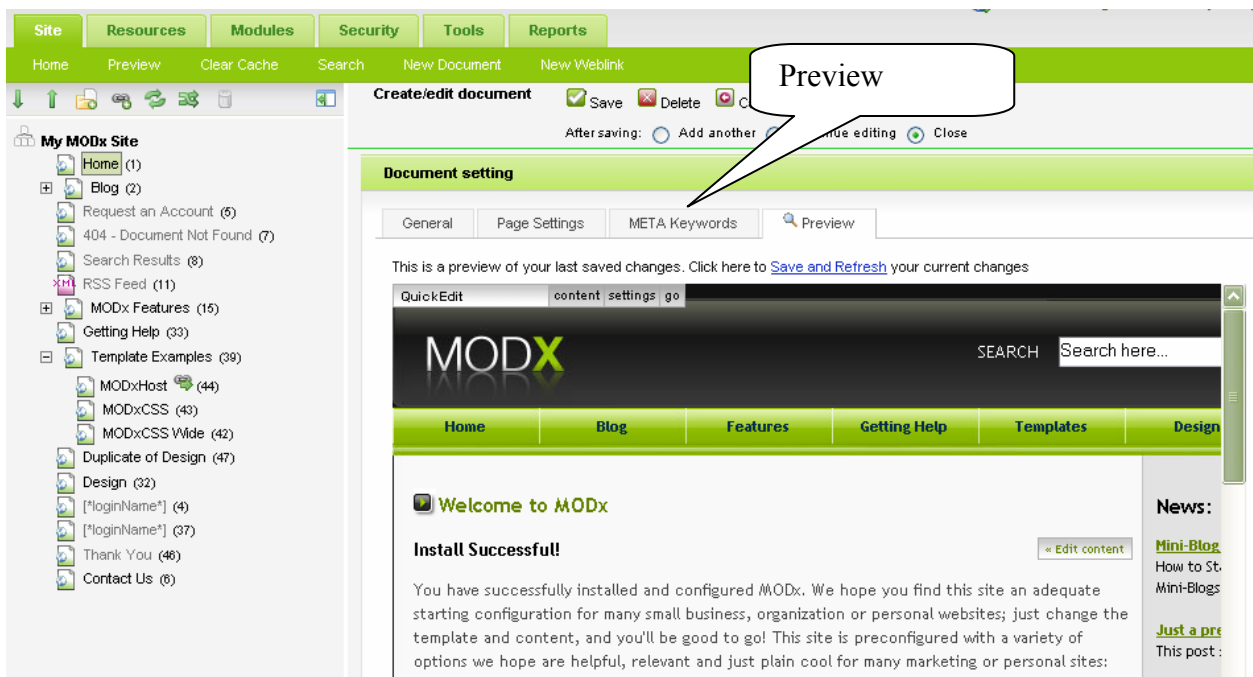


Figure 32 Preview Page

Site Preview

The Preview option on the dark green menu opens the site in a new window. This is useful when doing major changes to a site and you want to view the site as a whole. However in this situation only published pages will appear. This function is particularly useful if you have a staging site.

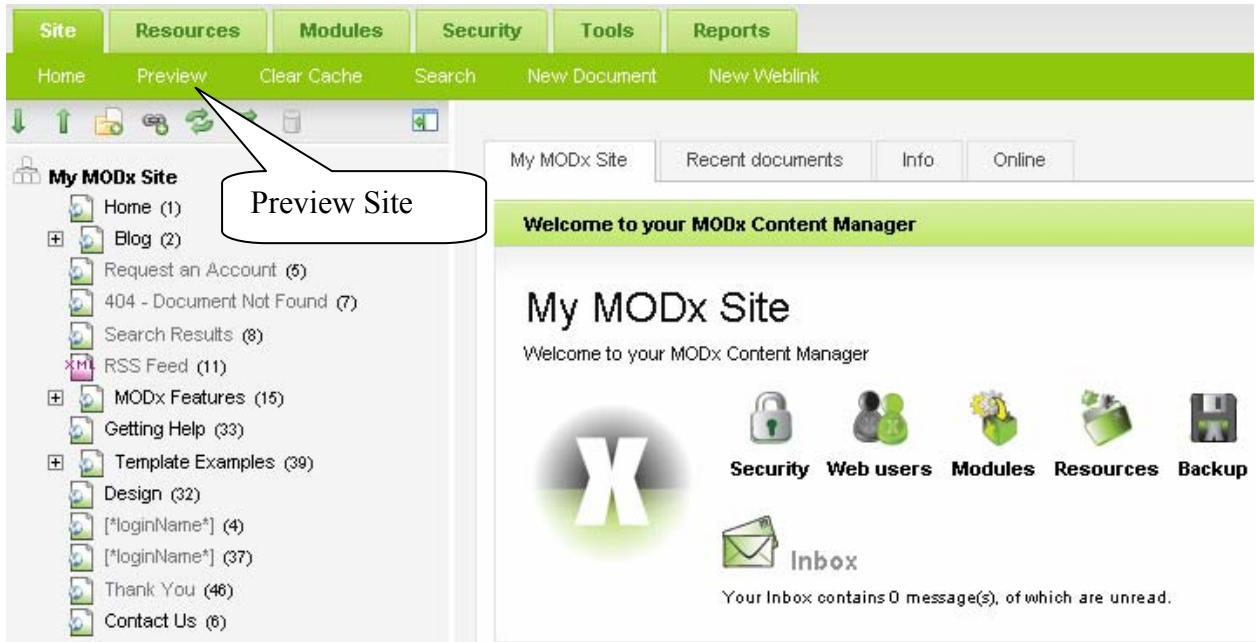


Figure 33 Site Preview

Managing Users

Adding New Users

To manage the users on your site click the Security Link from the home page on your manager and shown in Figure 34.



Figure 34 Security

This will open the Manage users section of your manager site as shown in Figure 35.

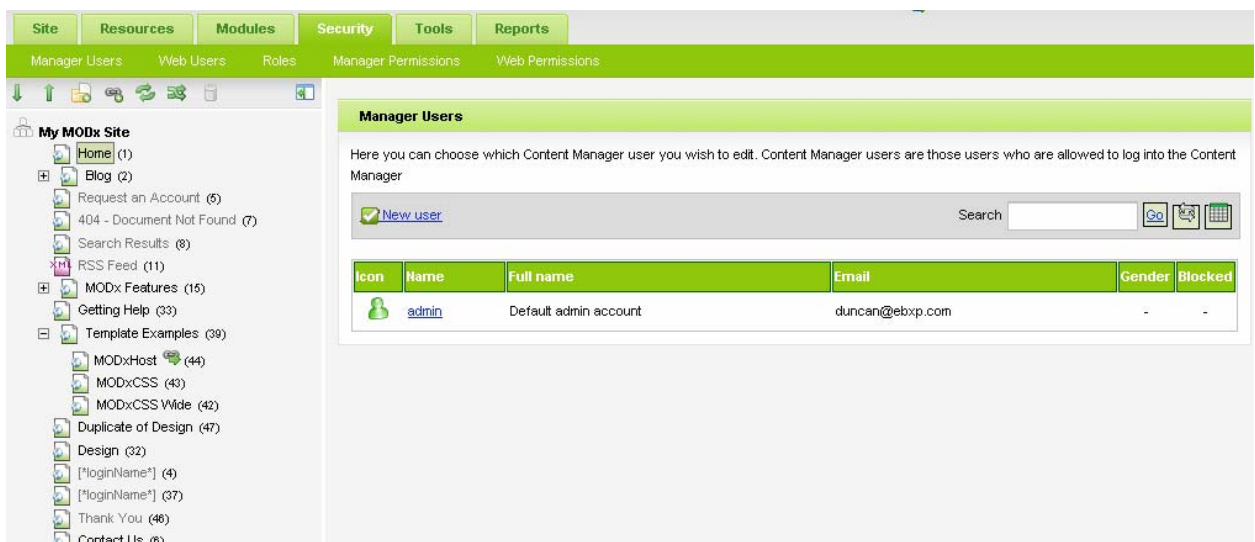


Figure 35 Manage Users

The same page is also accessible using the light green Security tab, and then clicking Manage Users from the second (light green) menu.

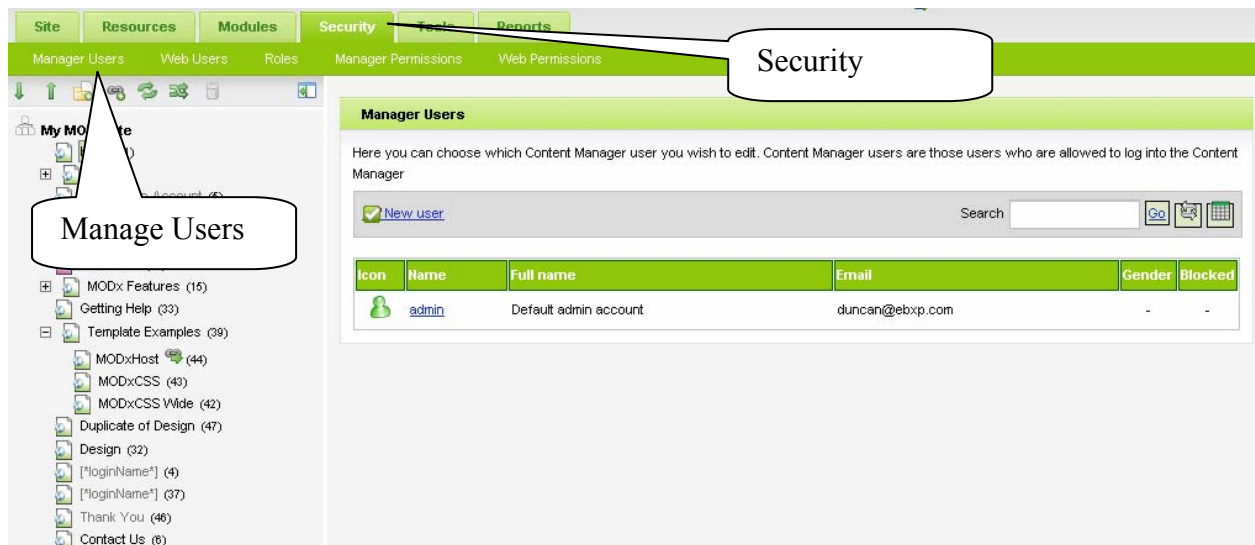


Figure 36 Manage Users

To add a new user, click the New user link as shown in Figure 37.

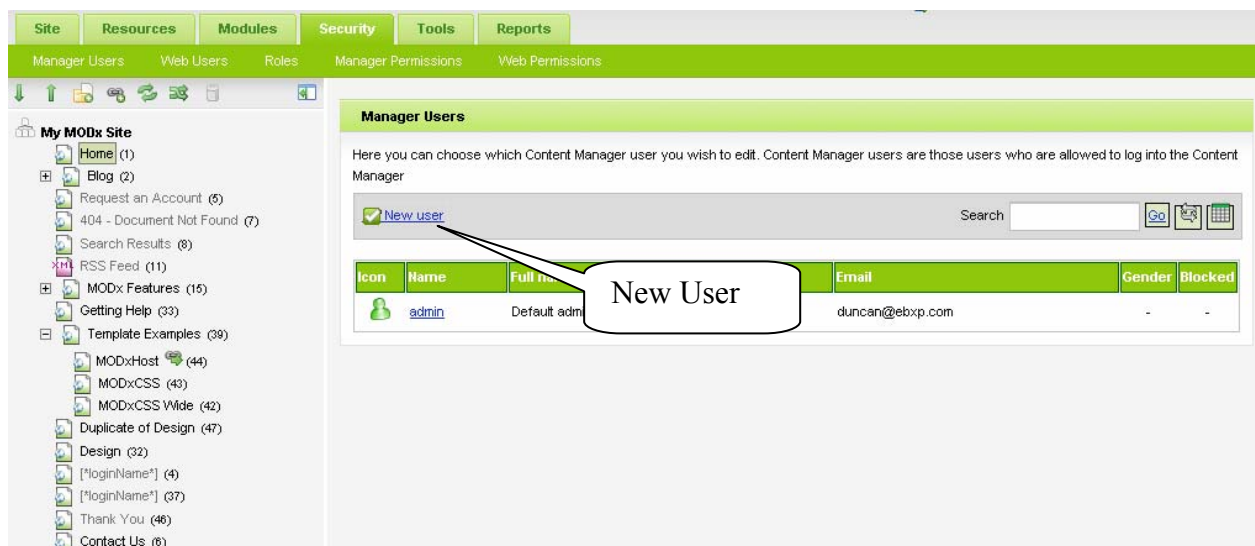


Figure 37 New user

CMS Manager Reference Guide

Enter the details of your new user by completing the details as shown in Figure 38.

Enter a username in the Username field. Then select either to enter a password manually or for the system to create one for you. If you select to create your own password it will need to be at least 6 characters long. It is always good practice to include upper and lowercase letters and both alpha and numeric characters in your passwords.

Re-enter the password and select to have the password emailed to the user at the address you enter in the email address field or to display on your screen.

Create/Edit user
 Save
 Delete
 Cancel

After saving: Add another Continue editing Close

Create/Edit user

General

User

Photo

Username:

Password:

New password method

- Let MODx generate a password.
- Let me specify the password:

New password:
 Confirm password:

The password you specify needs to be at least 6 characters long.

Password notification method

- Send the new password by e-mail.
- Show the new password on screen.

Full name:

E-mail address:

User's role:

Phone number:

Mobile phone number:

Fax:

State:

Zip:

Country:

Date of birth:

Gender:

Comment:

Access permissions

Here you can select which user groups this user belongs to:

"Scroll up"
 Save
 Delete
 Cancel

Figure 38 New User Details

These three fields are the most important to be completed. The remaining fields may be completed or left empty based on your company policy. There is only one user type in the basic CMS Manager set up giving all users complete access to the manager.

Always remember to click Save.

Editing Users

To edit an existing user click the relevant username on the user list as shown in Figure 39.

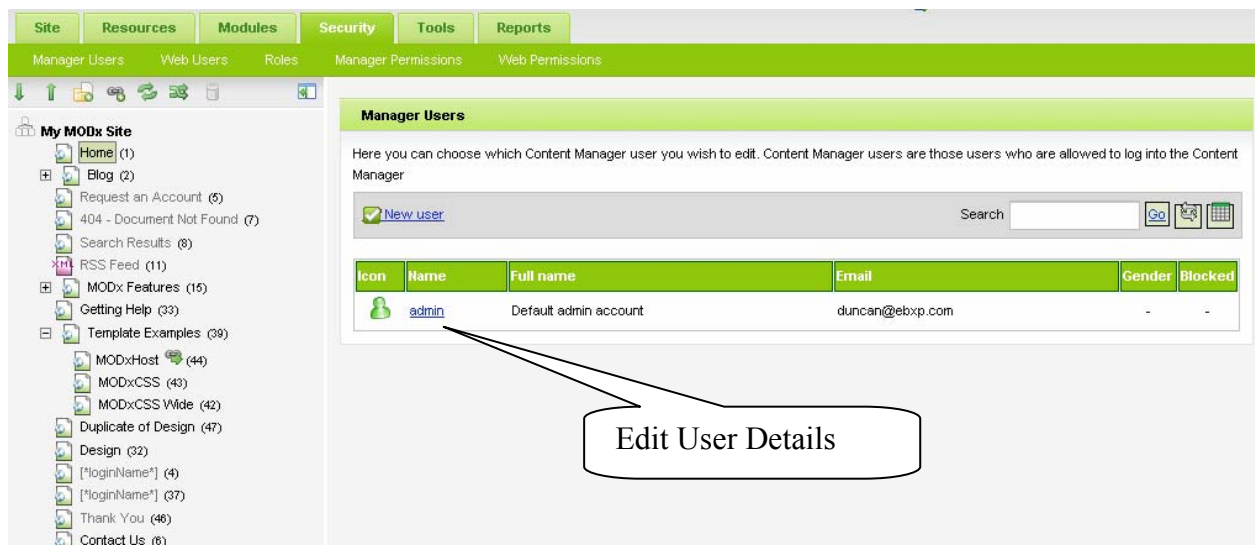


Figure 39 Edit User Details

The user details will be opened as shown in Figures 40.

Create/Edit user Save Delete Cancel

After saving: Add another Continue editing Close

Create/Edit user

General | **User** | Photo

Username:

Password:

New password method

Let MODx generate a password.

Let me specify the password:

New password:

Confirm password:

The password you specify needs to be at least 6 characters long.

Password notification method

Send the new password by e-mail.

Show the new password on screen.

Full name:

E-mail address:

User's role:

Phone number:

Mobile phone number:

Fax:

State:

Zip:

Country:

Date of birth:

Gender:

Comment:

Access permissions

Here you can select which user groups this user belongs to:

Save Delete Cancel

"Scroll up"

Enter the details in the appropriate fields and then click save, either at the top or at the bottom of the page.

Figure 40 Edit User

Changing User Passwords

From time to time you may be required to change a users password for security reasons or if they have forgotten it.

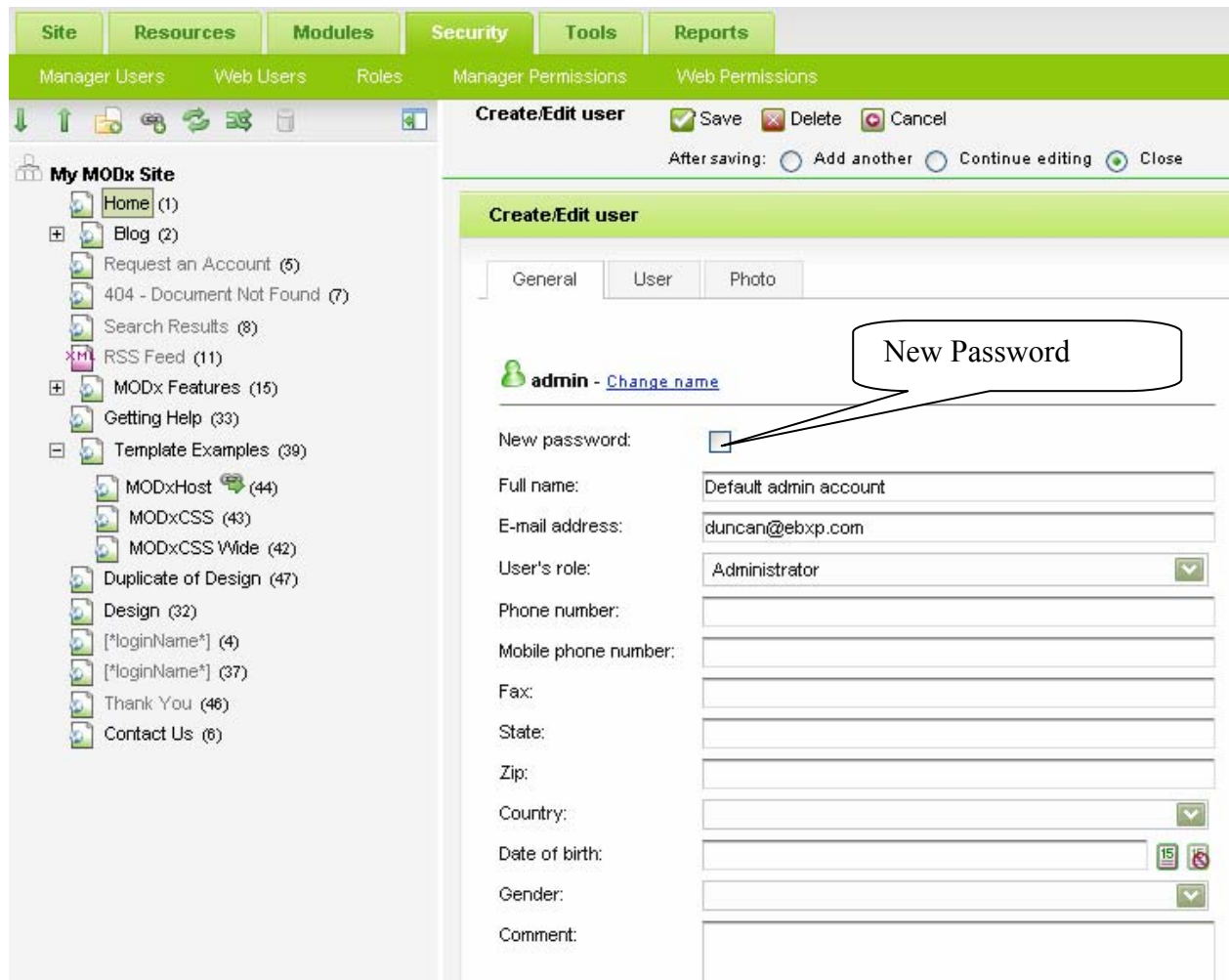


Figure 41 New Password Checkbox

To do this edit the user and check the New password checkbox as shown in figure 41.

The page will be refreshed to allow you to enter a new password or to have one created for you by the system and for the new password to be displayed on the screen or to be sent to the user's email address.

The screenshot shows the 'Create/Edit user' interface in the CMS Manager. The left sidebar displays a tree view of the site structure under 'My MODx Site'. The main content area is titled 'Create/Edit user' and includes a navigation bar with 'General', 'User', and 'Photo' tabs. The 'User' tab is active, showing the user 'admin' with a 'Change name' link. The 'New password' section is checked, and the 'New password method' is set to 'Let me specify the password'. The 'Password notification method' is set to 'Show the new password on screen'. The user's full name is 'Default admin account', the email address is 'duncan@ebxp.com', and the role is 'Administrator'. There are also fields for 'Phone number' and 'Mobile phone number'.

Figure 42 Enter New Password



Figure 43 Reset Blocked User

A user may have been blocked after three unsuccessful login attempts. To allow the user to login again reset the password as set out above and click reset on the number of failed attempts and uncheck the Blocked checkbox.

The Blocked Until and Blocked After fields can be used if an employee is taking leave or if a employee is to be given temporary access to the CMS Manager.

Don't forget to click save.

Deleting Users

To delete a user if access is no longer required to the CMS Manager, open the user for editing and click Delete.

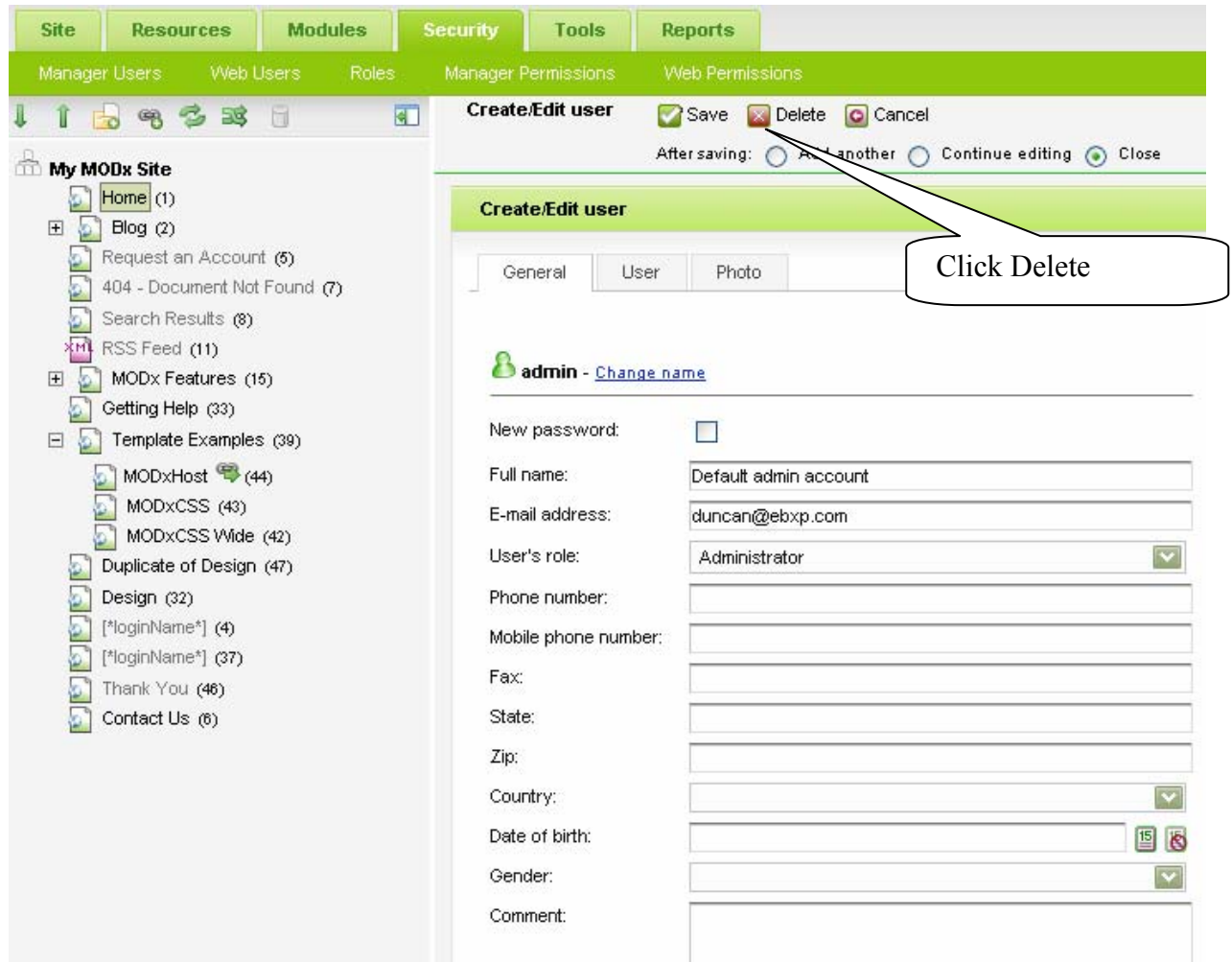


Figure 44 Delete User

Uploading New Images to the Gallery

There are two ways to update your image library. For individual images it is easier to use the Image Picker within the CMS Manager. If you are uploading a number of images you will find it easier to use an FTP client to upload the images directly into the image folders.

Using the CMS Manager, select the page you wish to upload the image to and open it for editing. Click on the Insert button against the appropriate image field to open the Image Picker. Open the folder you wish to add the image to.

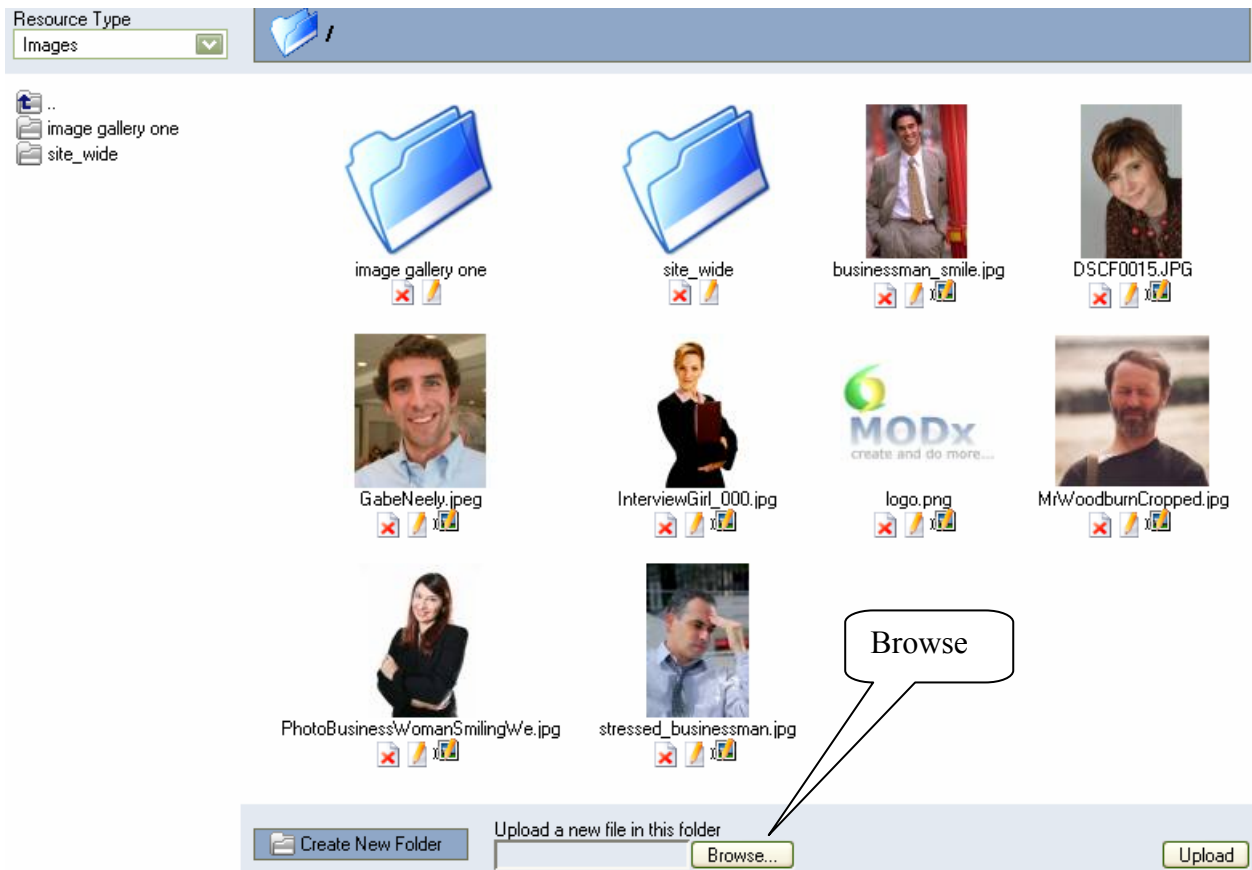


Figure 45 Image Picker

Click the Browse button to locate the appropriate image file on your system. When you have selected the image file click the Upload button as shown in Figure 46.

CMS Manager Reference Guide



Figure 46 Upload Image File

The image will be added to the open folder. Click on the new image to add to the field on the page originally selected.

Logging Out

To Log out click the on the top right hand side of Logout button from the right hand control menu.

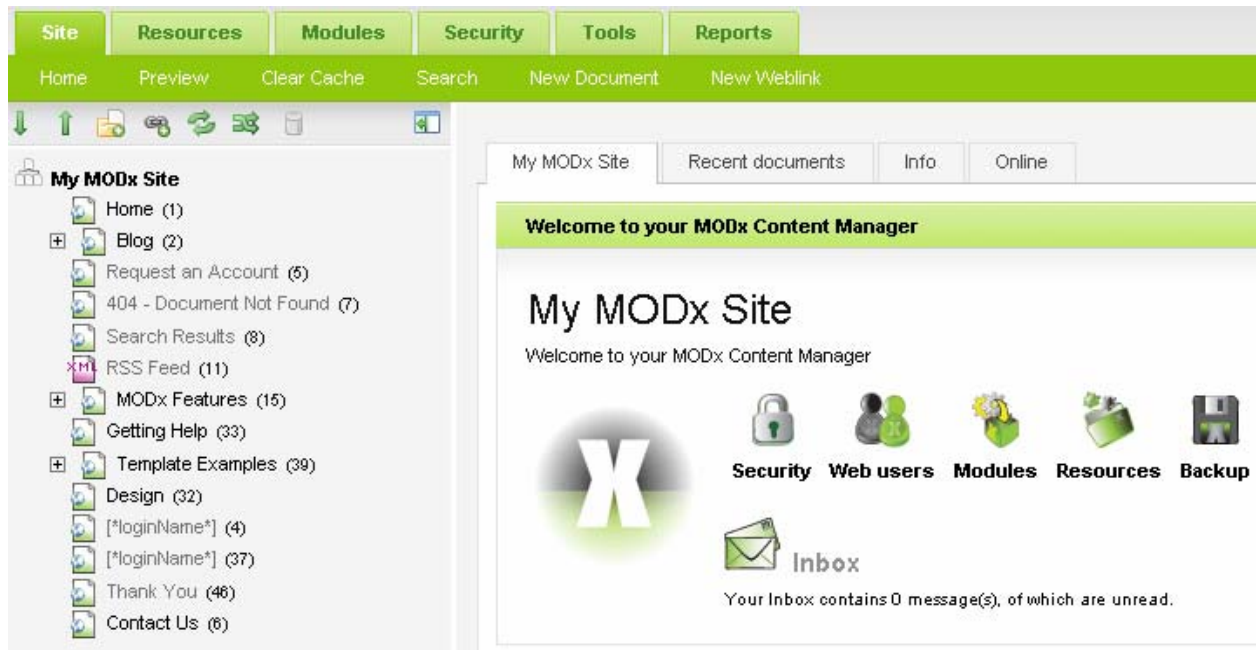


Figure 47 Logging Out

Summary

The CMS is a very powerful tool that contains a great deal of functionality. This guide covers many of the functions needed to manage the site in its existing format.

Additional functions are available within your CMS Manager include:

- Creating new templates
- Logging user activity
- Create additional user types

These are more technical in nature and not covered here.

Appendix A

- Image Sizes

Appendix B

- Templates

