silktide
the web development experts

Silktide
Site Manager
User Guide

For further support:
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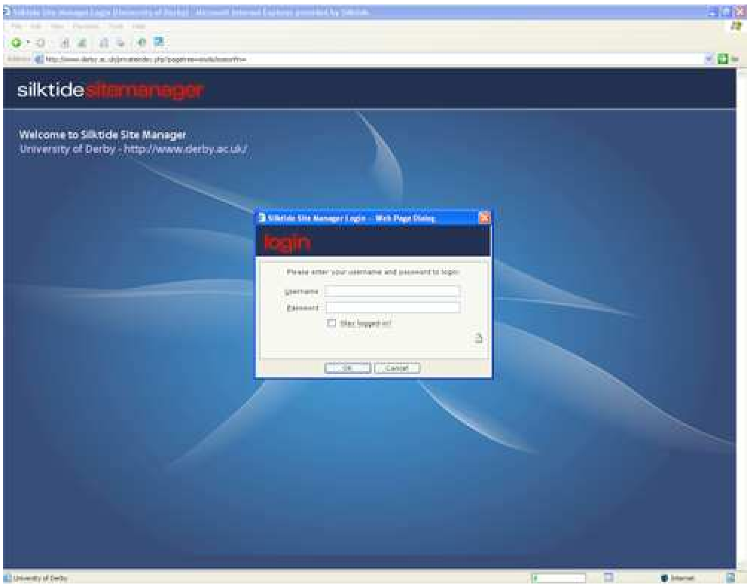
Getting Started

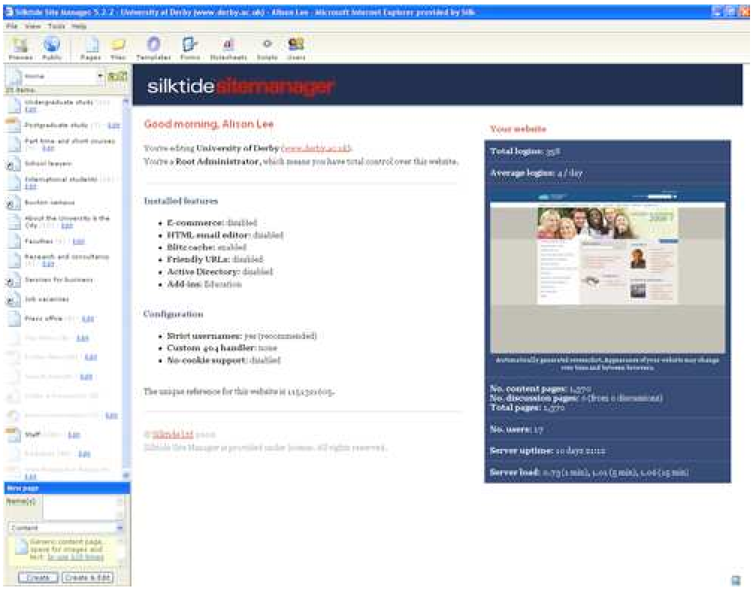
Logging in

In Internet Explorer, go to www.yourwebaddress.com/login e.g. www.silktide.com/login.

You should be presented with the following screen. If it does not appear, check that any pop-up software* is set to allow pop-ups from the site.



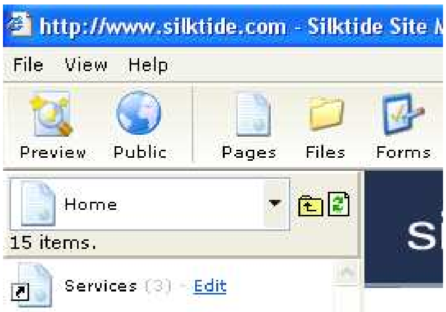
Enter your username and password and click on **OK.** A new window should open and present you with a welcome screen:



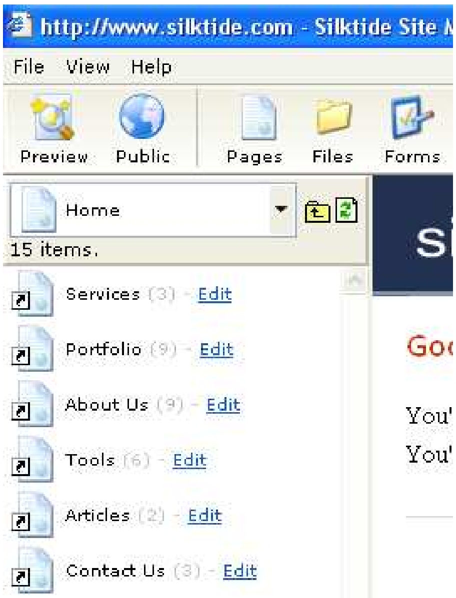
* Common pop-up blockers include Windows XP SP2 and the Google, Yahoo and MSN toolbars. Some anti-virus and anti-spam software also blocks pop-ups.

Finding your way around Site Manager

Select the pages option in the top line of icons, shown here:



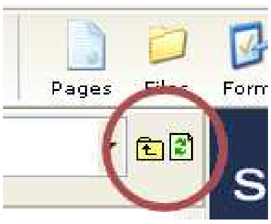
Pages within your site are shown in the menu on the left of the screen. The number in brackets is the number of sub-pages within that page.

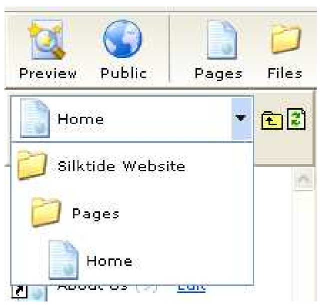


To edit a page, click on the blue Edit link beside the page name

To edit pages within a page, **double click** the page name and the list should refresh and show those pages contained within the selected page.

To return to the previous level of pages, use either the folder icon with the **arrow pointing left and up**, or click the **drop down menu**.





A Guide to Site Manager Icons

There are several different icons that you may see throughout Site Manager.

The blank page icon indicates a page in your site that can be edited. The pale version indicates that the page is 'invisible'. It can still be edited and accessed from links in your site but it will not appear in any menus or navigation.

The page icon with an orange bar indicates that the page has been edited in some way but not yet published to the public site. Again the pale version indicates an 'invisible' page.

The page icon with a green bar indicates that the page has been edited and finished but not yet published to the public site. Again the pale version indicates an 'invisible' page.

The page icon with an arrow indicates that the page is a shortcut to another. Do not edit this page as any content will be ignored and the visitor will be redirected to a different page.

This page icon with a red cross indicates that the page cannot be edited. There will be no blue edit link next to the page name.

This page icon indicates that the page is secure and uses SSL. It can be edited in the usual way.

This is the unpublished version of the above icons.

The 'home' icon indicates a microsite home page. This is like a sub-site within your website. There are unpublished and invisible versions of this icon.

Pages

Once you have clicked on the edit link for the page you wish to alter, it appears in the main area, ready to edit.

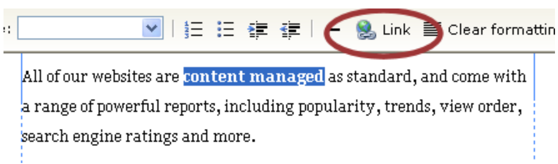
Editable areas of the page appear with blue or orange dashed borders. Text can be entered into these boxes and formatted.

Formatting text

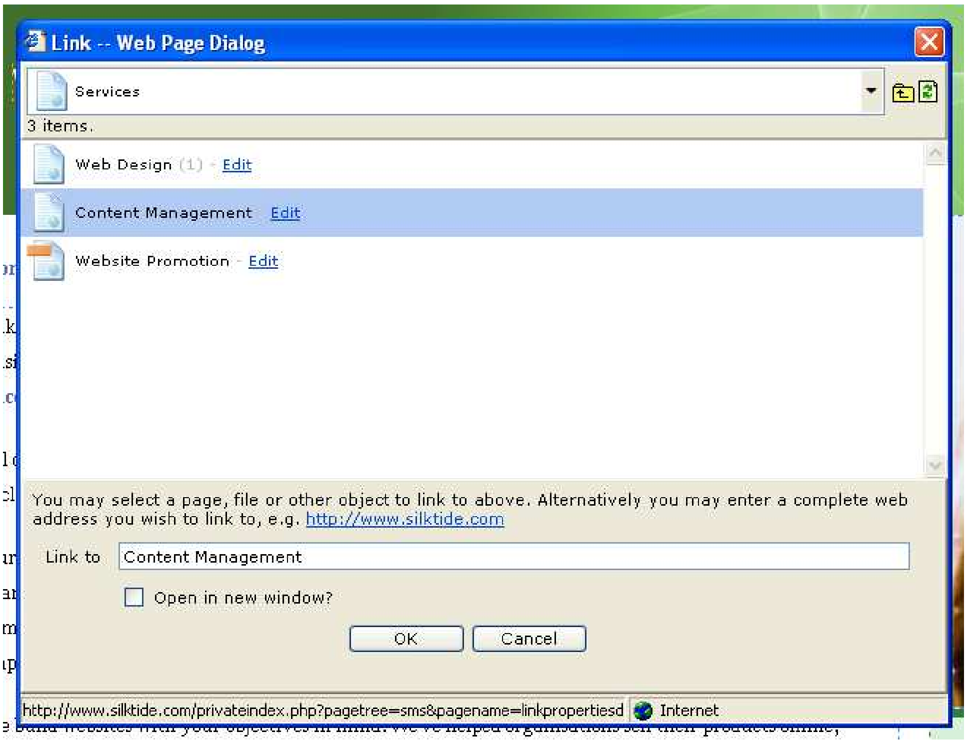
You can make text **Bold**, *Italic* or <u>Underlined</u>, insert bulleted or numbered lists, and adjust the alignment using buttons along the top of the page.

Creating links

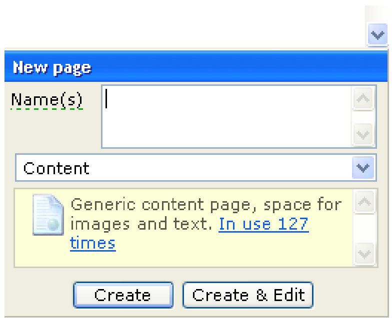
To create a link to another page, **highlight** the text you wish to use as the link and the click the link icon.



A new window will appear. Select the page you want to link to with a single click and then click on OK. Double-clicking on a page name takes to down into the sub-pages.



Creating a new page



Pages are added at the current location displayed in the left hand menu.

To add a page inside the current location, type the name of the new page inside the **Name(s)** box at the bottom left of the page.

Select the template you would like to use for the new page from the drop-down list. A short description of the template will appear below the drop down. If the template is already in use on your website, click the 'In use…' link to see an example of the template being used.

Click **Create and edit** if you wish to edit the page immediately, or **Create** if you will be editing it later. Pages can be edited at any time after creation.

The new page will appear at the bottom of the list in the left hand menu. To move the new page up the list, right click on the page name and select **Move up** from the list that appears. Repeat this until the page is in the required place.

Renaming a page

You can rename any page at a later date by **right clicking** on the required page name in the left hand menu and selecting **rename** from the menu that appears.

Creating a shortcut to a different page

Sometimes you may want to make a page forward to a different one automatically for example when one page needs to be accessed from two different menus but you don't want to add the same information twice. To do this **right click** in the left column on the page that you want to be the shortcut (NOT the destination page) and select **properties**. Towards the bottom of the **page** tab of the properties box there is a shortcut section.

To forward to another page within your own website click the **browse** button and locate the **destination page** then click **OK.** The destination will appear to the left of the browse button as a link – clicking this link will open the page in a new window so you can check the destination page is correct. To forward to a page outside of your own website enter the full address (including the http://) in the box labelled **External web address** and click **OK**.

The icon next to the page name will change to show a small arrow over the page icon indicating a shortcut is in place. You must publish this page to make the shortcut work on the live site. To remove a shortcut, open the properties box in the same way, click the **Clear** button within the shortcut section and ensure that the shortcut URL field is blank.

NOTE: Once a shortcut is in place on a page it can no longer be edited as this page is never fully loaded in the browser. To make changes to the page that loads you must edit the **destination** page.

Moving pages

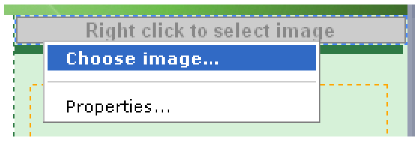
The order of the pages in the left hand menu will normally be the order they are displayed in a menu on your website.
You can change the order of these pages by right clicking on the required page name in the left hand menu and selecting **Move Up** or **Move Down**.

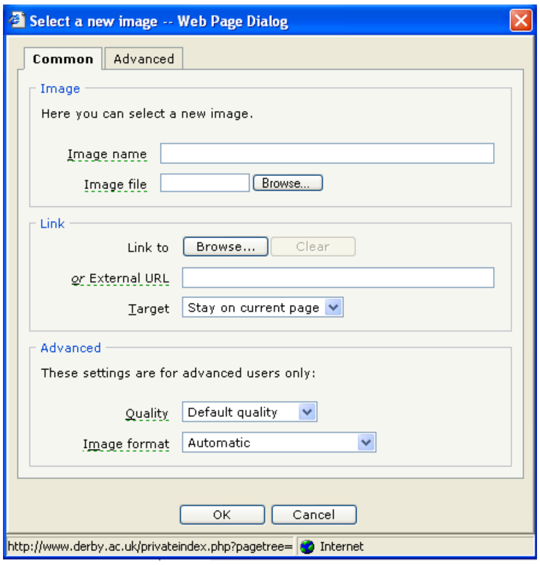
You can sort pages alphabetically by right clicking any page and selecting **Sort Pages Alphabetically**.

Images

Inserting a new image

To insert an image, **right click** on the grey box and select **Choose image**. A window will pop-up.





In the new window in Image Name, enter a **description of the image**. This will appear instead of the image in text only browsers.

Use the **Browse** button to locate the file on your computer. Select the file and click Open.

NOTE: Images must be in jpg or png format, gif is NOT recommended.

Click OK to use the new image on the page. The image will re-sized and compressed automatically to work best on the web.

You can make your image link to another page in the link section of the properties. To link to a page within your own website click on the **Browse…** button, locate the destination page and click **OK**. To link to a page outside your own website enter the full address (including the http://) in the **External URL** field. To can also specify whether the new page will open in the same browser window as the current page or open in a new window using the drop down menu.

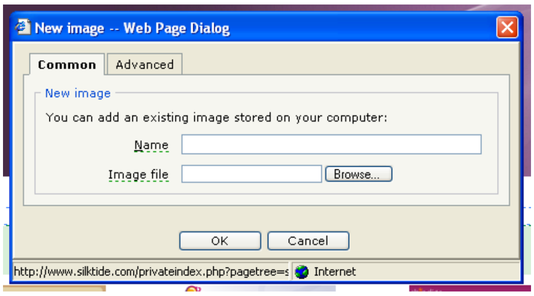
Changing an existing image

To change an existing image, right click on the image and follow the steps above. The new image will replace the old one.

Using an image gallery

Pages containing an image gallery will appear as a group of image thumbnails on the page editor with a pale green bar above them.

To **add** a new image, **right click** on the green bar and select **Add image**. In the box that pops up enter the text that you would like to appear underneath the thumbnail into the **name** box, then click on the **browse** button and select the image you would like to appear in the gallery. Click OK and the page will refresh and show you the new image in the gallery.



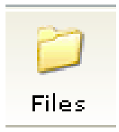
To **delete** an image from the gallery, right click on the green bar and select **view/edit images**. The left column will change to display the images currently in the gallery. **Right click** on the <u>image you wish to delete</u> in the left column, select **delete** and click **OK**.

The **edit the text** displayed underneath a thumbnail, right click on the <u>image you wish to change</u> in the left column and select **rename**. Enter the new text and click **OK**.

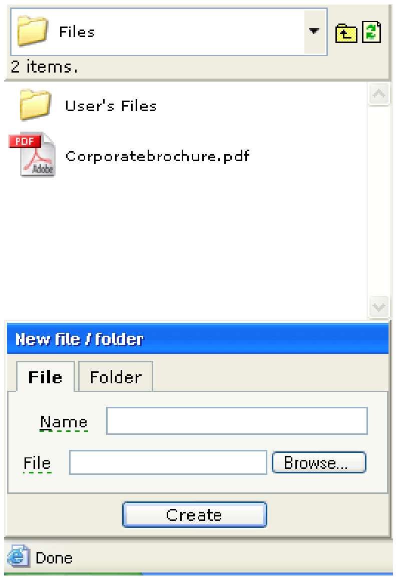
Files

Adding files manually

To add a file to the site, e.g. a PDF document that you want people to be able to download, click on the **Files** icon on the top menu bar.



The left menu should refresh to show you the file area, including any files you may already have in your site.



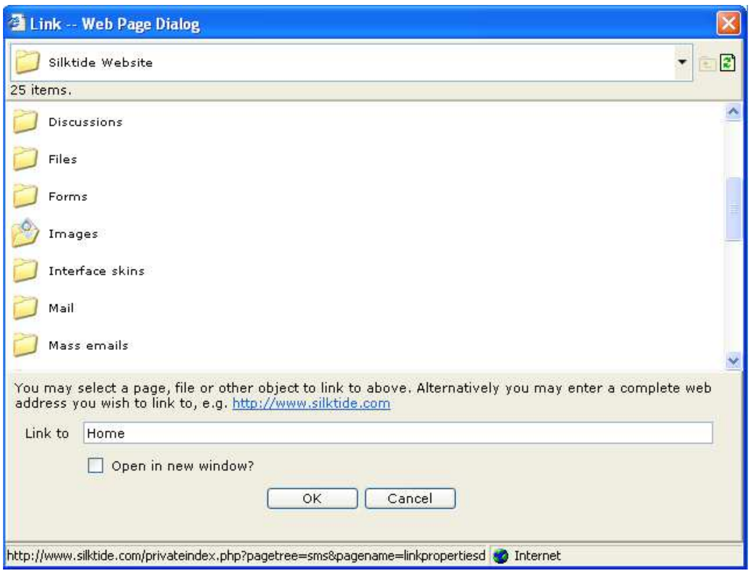
To create a new file, type a name for your file in the box in the bottom left corner of your screen, then click the **browse** button to locate your file and click **create**.

The left menu will refresh (this may take some time depending on the size of the file) to show your new file in the current list.

Before you can link to your file you must publish it to the live site, do this by right clicking on the new file in the left hand column and selecting **publish** then ok.

Creating links to files

While editing a page, select the text you wish to link to the file and click on the link icon at the top of the main editor window, in the same way as if you were linking to a different page.



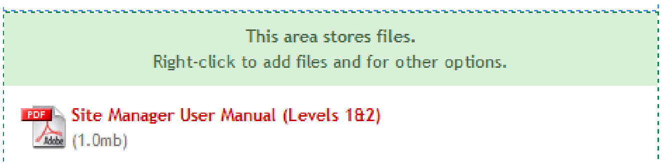
Use the drop down list to select the top level of your site.

Double click on the **Files** folder, navigate to the file you wish to link to then click once on the file name. You can select the link to open in a new window by ticking the **Open in a new window?** box. Click **OK** to add the link.

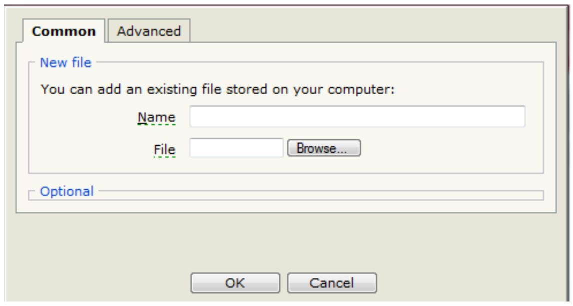
The link to your file has been added to the page. You may save and publish this page to make it available to the public.

Using a file gallery

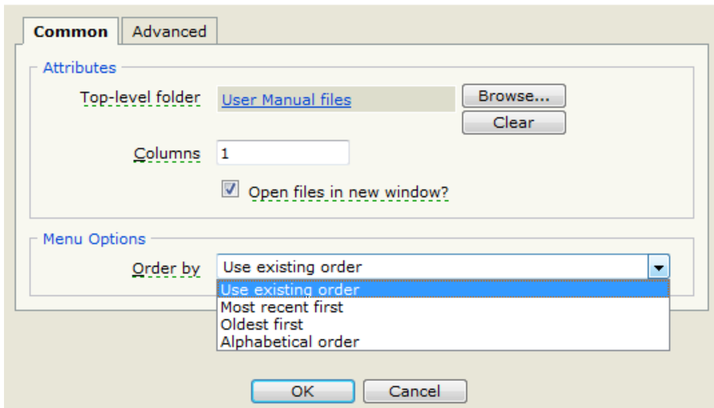
Pages containing a file gallery will appear as a group of icons and file names in the page editor with a pale green bar above them.



To **add** a new file, **right click** on the green bar and select **Add file**. In the box that pops up enter the text that you would like to appear on the page as the file name into the **name** box, then click on the **browse** button and select the file you would like to appear in the gallery. Click OK to upload the file and the page will refresh and show you the file listed in the gallery. If it is a recognised file type (Word, Excel, Publisher etc) an icon will automatically be displayed alongside the file name and file size.



To change how many columns that the files are displayed in, **right click** on the green bar and select **Properties**. Enter the number of columns you want in the **columns** box. Within the properties you can also change whether the file will open in a new window or in the current window and what order they are displayed in on the page.



Deleting a file

To **delete** a file from the gallery, right click on the green bar and select **view/edit files**. The left column will change to display the files currently in the gallery. **Right click** on the <u>file you wish to delete</u> in the left column, select **delete** and click **OK**.

Editing a file name

The **edit the text** displayed as the file name, right click on the <u>file you wish to change</u> in the left column and select **rename**. Enter the new text and click **OK**. Publish the file to make the change live.

Saving, Finishing and Publishing

Preview and public sites

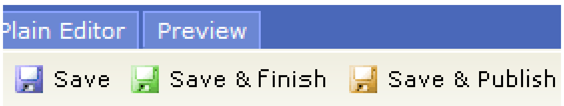
Pages that have been edited, but not published, have their changes visible only on the preview site. Public versions remain unchanged until the page is published. An unpublished page is indicated by an orange block over the page icon.

Some users will have permission to edit a page but not publish it to the live site. In this case the page needs marking as finished so it can be checked and then published by someone with higher permissions. A file that has been 'finished' is indicated by a green block over the page icon.

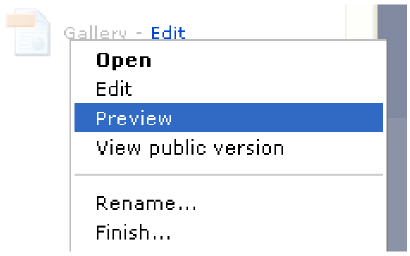
To save changes to the **preview** site, click on the **Save** icon with the picture of a **blue** floppy disk.

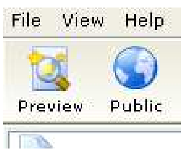
To finish a page for later publication, click on the **Save and Finish** icon with the picture of a **green** floppy disk.

To save changes to the **public** site, click on the **Save and Publish** icon with the picture of a **yellow** floppy disk.



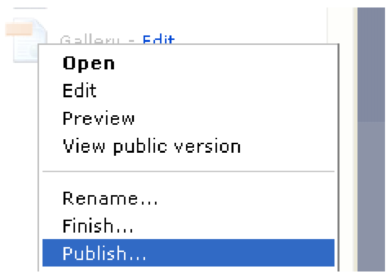
To view the changed page on the preview site you can **right click** on the page in the left hand menu and select **Preview** from the options that appear. This will open in a separate browser window and take you straight to the unpublished page.

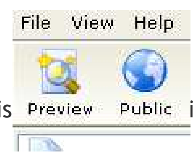




You can also preview the whole site by using the **Preview** icon at the top left. This will open at the home page.

To publish a page, either **right click** on the page name in the left column as before and select **Publish** from the options that appear or if the page is open click the **Save & Publish** button on the toolbar. A new window will pop-up to confirm that you want to publish the page. If you have made changes to pages within that page and wish to publish them as well, you can tick the **Publish sub-pages** option. Click **OK**, after a few seconds, the left hand menu should update and the page icon should no longer have the orange bar across it.





When you wish to view the public/live site, you can use the **Public** button.

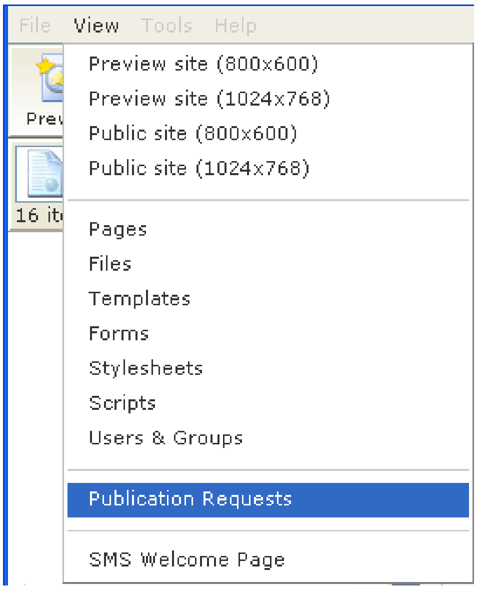
Pages waiting to be published

There are 3 tools in Site Manager to inform administrators about pages waiting to be published. These should be used in combination as each has its advantages and disadvantages.

Good housekeeping

Particularly on small sites (fewer than 100 pages) it is often worth logging in and just browsing through the pages to see if there are any that need to be published. **Unpublished files have an obvious orange rectangle** overlaying the page icon and this can be a quick and easy way to preview the pages, edit them as necessary and publish the finished version. Search engines like it when websites are frequently updated, so we would recommend keeping your pages updated as general good practice.

View Publication Requests



Login as an administrator and select View, Publication Requests from the top menu.

This will display a list of **all unpublished objects** on the website.   Left click to select each page you wish to Publish and right click, Publish… them as normal.

If you don't recognise some of the objects, get in touch as we'll tell you if they need publishing (some will be essential system files, but others can be deleted)

Email notification

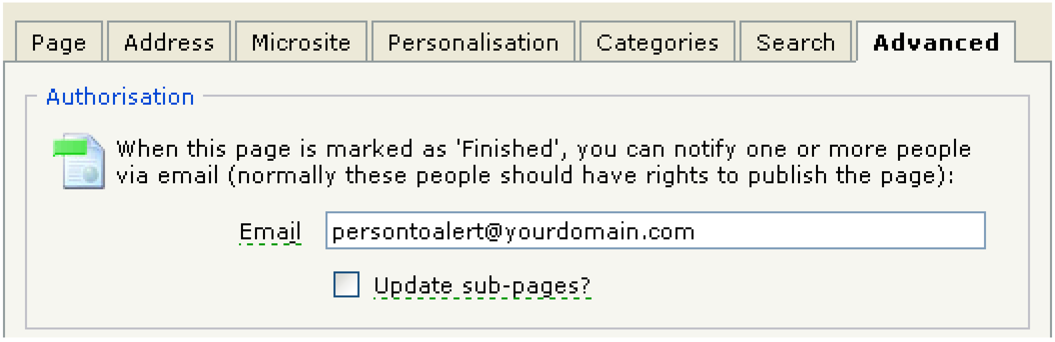
Tip
This is a fairly new component and may not be active on your website. If your Site Manager version is less than 5.2.1 please contact Silktide and we will upgrade your system. The top title bar in Site Manager shows your version number.

Email notification sends an email whenever a page is Saved & Finished (i.e. a user has clicked the 'Save and Finish' button) <u>and</u> an email address has been associated with that page.

In general the email address should be of someone with rights to publish the page, but there may be exceptions for instance if you employ a copywriter. Email notification can be set on individual pages or sections are required.

Set up Active notification on a page

In Site Manager right click on the page and select Properties. Select the Advanced tab (far right). In the 'Authorisation' section add the email address of the person you want to be alerted and click OK.

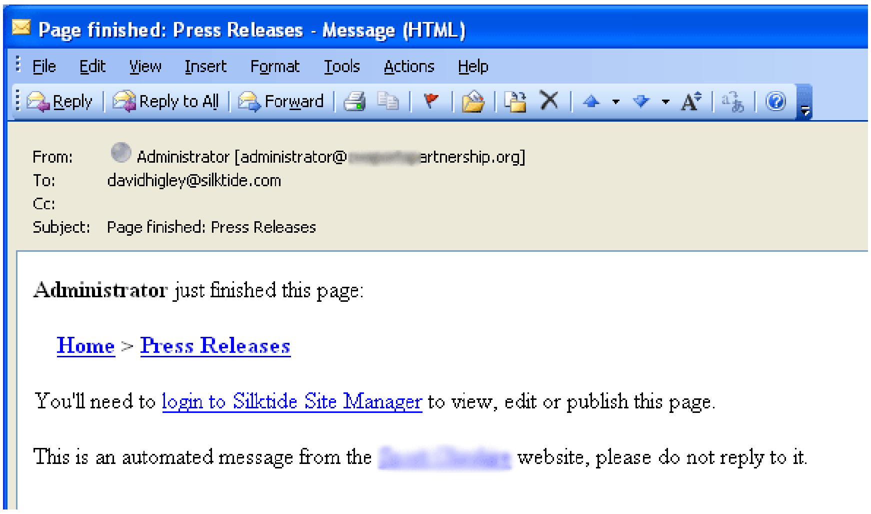


Set up Active notification on a section

Follow the instructions as above and tick the 'Update sub-pages?' box. They will be informed when any pages within that section get saved with 'Save & Finish'.

What the alert looks like

The system sends a simple email with the relevant information and links.



Users and Groups

NB The below tasks should be performed seldom and only by an Site Manager Administrator. If in doubt, please contact Silktide and we will be pleased to help.

What is a user?

A user is an account on Site Manager that gives greater access to the system than being an anonymous site visitor.   A user account is generally associated with an individual person and has a unique username to login to the system. The access level usually depends on group membership, but user rights can be set independently if required.

What is a group?

A group is simply a collection of Site Manager users. Groups make it much simpler to set access rights for the website as you assign rights to a group, then add and remove users to and from the group. As their membership changes, so do their user rights.

Standard settings

Site Manager comes with 2 standard groups already set up: Site Manager users and Site Manager administrators.
The **Site Manager administrator** group is very powerful and should only be used by senior staff who have sufficient authority and who know what they are doing on the system.
The **Site Manager user** group can still do a lot on the site including creating and publishing pages, however cannot amend forms, templates or users.

Tip
The most common variation to the standard settings is to remove Publishing rights from Site Manager users. This means only Site Manager administrators can publish pages.

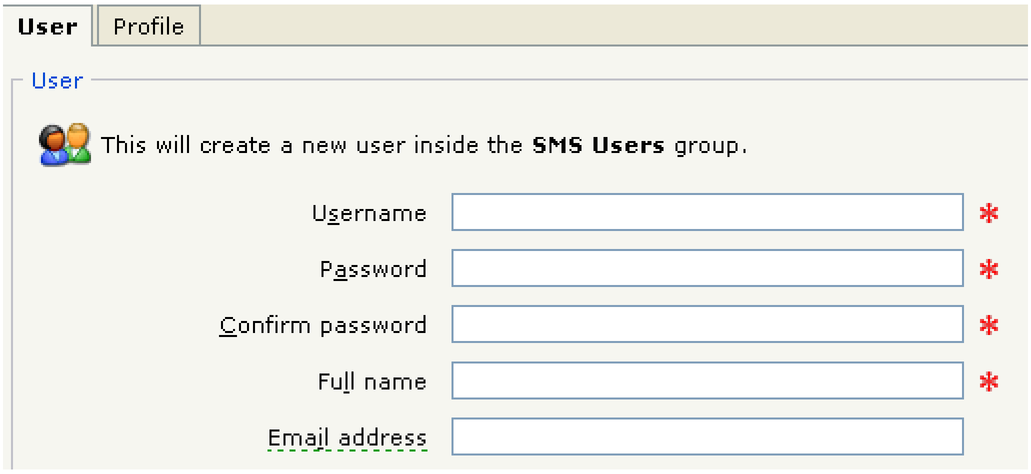
View group members

1. Login to Site Manager with an account with administrator rights
2. Click the ‘Users’ icon in the top right of the menu bar to show a list of user groups
3. Click a user group name to see a list of members e.g. click ‘Site Manager users’ to see a list of Site Manager users, Site Manager administrators for a list of Administrators etc.

Add a new user to a group

1. Follow the above steps so you can see the current members of the group
2. Click the ‘New User…’ button under the search box 

3. Add the new user's details to the User form (below).



4. Click OK.

The user will immediately be able to login with the Username and Password assigned to them.

Add a current user to a group

When the user is already on the system, but they need their security level increasing (e.g. from Site Manager user to Site Manager administrator)

1. Follow the above steps to see the current members of the group
2. Click the 'Add users to this group…' button Add users to this group...
3. Type a few characters of their name in the 'Find:' box. The y should quickly appear in the below box
4. Click the name to select it and click the 'Add >' button in the middle of the page
5. Do the same if you have more than one person you want to add (i.e. find and add them one at a time)
6. Click OK

Remove a user from a group

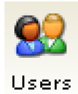
When the user is already on the system, but they need their security level decreasing (e.g. from Site Manager administrator to Site Manager user)

1. Follow the above steps to see the current members of the group
2. Tick the checkbox next to the user(s) you want to remove from this group. This will turn the respective table row(s) blue . Un-tick the box if you make a mistake.

3. Click the 'Remove from this group' button Remove from this group

Add a new group

This should be used very rarely and only if you have users who don't fit into the above groups. Please get in touch if you need help.

1. Login to Site Manager with an account with administrator rights
2. Click the 'Users' icon in the top right of the menu bar to show a list of user groups 

3. Click the 'New Group…' button 

4. Give it an intuitive name and description
5. Click OK to save the group

Tip
You will need to add users to the group (see above) **and** change the permissions on files and sections (see below) for the new group to have any effect.

Delete a group

*This should only be done if you created a group by accident and need to delete it. Deleting a group which has members in it will not delete the members but it **will** affect their access rights if permissions have been associated with the group. Please use with extreme caution.*

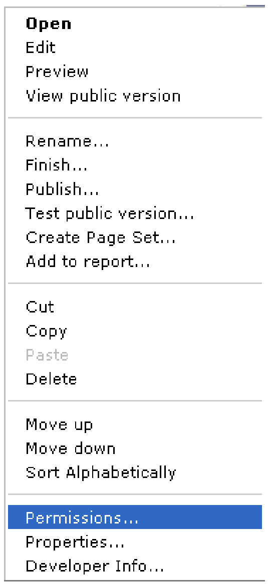
1. Login to Site Manager with an account with administrator rights
2. Click the 'Users' icon in the top right of the menu bar to show a list of user groups
3. Tick the checkbox next to the group you want to delete. This will turn the respective table row(s) blue. Un-tick the box if you make a mistake.
4. Click the Delete button 

5. On the following page click OK to confirm you want to permanently delete the group.

Permissions & Workflow

NB The below tasks can usually only be performed by an Site Manager Administrator.

Setting permission on a page



Navigate using the left menu until you can see the page you want to edit.

Right click on the page to bring up the menu and select Permissions…

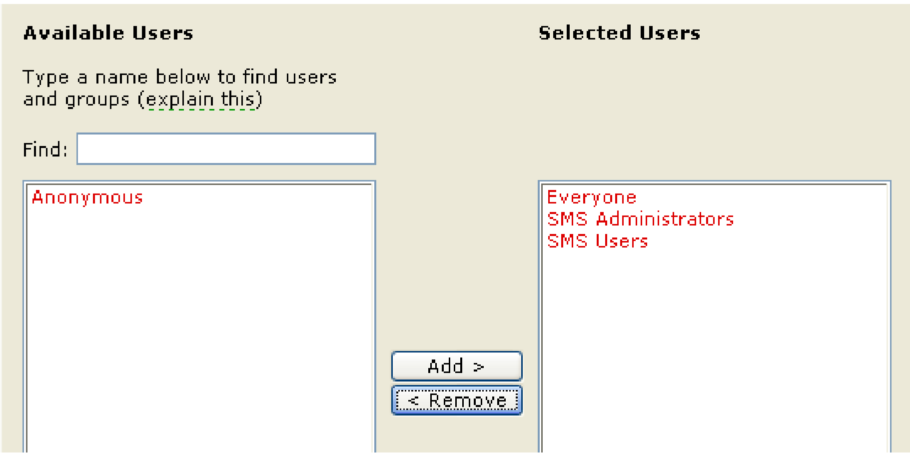
Tip

If you get a "can't edit permissions" block, contact your local administrator.

Restrict viewing rights

To control who can view pages, select the **Read** tab along the top of the window.

In the right-hand box, click to highlight the group you wish to prevent viewing this page and click the '**<Remove**' button. NB Groups must be removed one at a time.



Tip

The most common use of this is to hide pages from anonymous web visitors. To do this whist allowing access to your registered users, remove the Anonymous group from the left hand box.

Restrict Editing rights

Workflow is necessary when a large number of people are able to create and edit web-pages, but only senior staff should be allowed to publish the page.

To control who can edit pages

In general this should be restricted to Site Manager users and administrators. Removing groups will prevent them seeing the 'Edit' button in the left menu (see right)

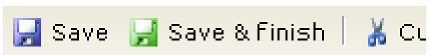
1. Right click on the page/section you want to change and select Permissions…

2. Select the **Write** tab
3. Highlight the group you wish to prevent being able to edit this page from the Selected Users box
4. Click the remove button
5. Click OK to commit the changes

To control who can publish pages

In general this should be restricted to Site Manager administrators only. Published pages are immediately visible to your website audience. Removing groups will prevent them seeing the 'Save & Publish' icon and being able to use right click to publish pages.

Without publishing rights



With publishing rights

1. Right click on the page/section you want to change and select Permissions…

2. Select the **Publish** tab
3. Highlight the group you wish to prevent being able to publish this page from the Selected Users box
4. Click the remove button
5. Click OK to commit the changes

Tip
If 'Save & Finish' doesn't show as an option, please get in touch and we will upgrade your installation of Site Manager.

Setting permission on a section

To set the above permissions on an entire section, follow the same procedures above as you would for a page, but ensure you tick the 'Set rights for contents?' tick-box at the bottom of the screen.

<u>All</u> sub pages (and sub-sub-pages etc) will

Tip
Please be **very** careful when setting permissions on a section! It is usually best to agree how the permissions structure will work early on in the project so that every user sees the correct interface from the start and so major changes are unnecessary.

Setting permissions on other objects

Whilst it is possible to set permissions on Forms, Downloads, Templates and Users **we recommend you don't** unless you are certain this is necessary. Please contact us if you have any queries and we will be pleased to help.

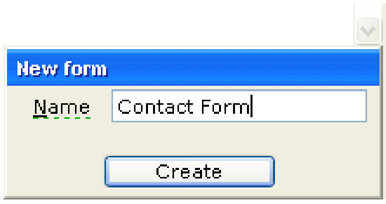
Forms

Creating a new form

To create or edit a form click on the **Forms** icon on the top menu bar. The left column will refresh to show a list of forms that have already been created.

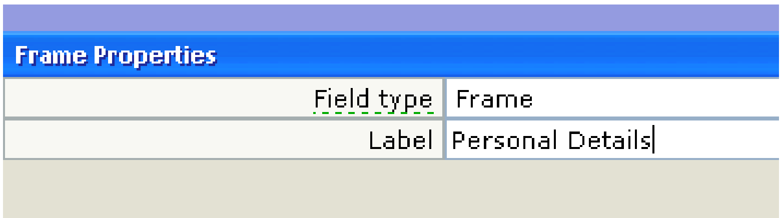
To create a **new form** type a name for your form in the box at the bottom of the left column and click **create**. Your form will then appear in the list in the left column.

To **edit your new form**, or an existing form, double click on the form name in the left column. The form editor will then open in the main area of the screen ready to be edited.



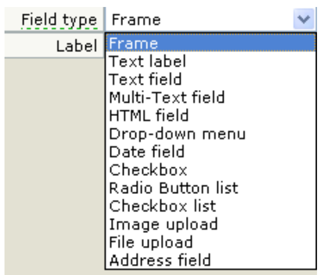
The top part of the editor shows you what your form will look like (bear in mind that styles set in external files may alter the appearance of your forms). At the bottom you can set the individual properties for each component. Some of these are common between components and some are specific to a particular type.

When creating a new form, a ‘frame’ component is automatically inserted. This is a border around a set of other components that groups elements of a form together with a title, or label, in the top left corner. If you want to create other form fields inside this frame click on the top left of the component where it says ‘No label’ and enter the title you want to appear in the frame in the Label box of the properties at the bottom of the screen.



Click the **Save changes** button and once the screen has refreshed click the **New inside…** button. This will allow you to create form fields inside your frame. You can also create new frames or new fields above or below your saved frame by clicking the **New above…** or **New below…** buttons.

If you don’t want a frame around your form components you can click on the ‘No label’ area and then select a different type of component from the drop down list in the frame properties. The form will refresh to show you the new component in its place and the properties relating to your new component will also be displayed.



Adding a new form component

To add a new component to the form, click on a component above or below where you want it to go and click on the **New above…** or **New below…** button as appropriate. Click on the new component in the form to display the relevant properties box at the bottom of the screen.

For all the components, once you have made any changes to the properties you must click the **Save changes** button for the changes to take effect before moving on to editing another component or all your changes will be lost.

Common properties

Some properties are common between several of the components. These are detailed below:

- **Name**
  Each new component must be given a unique name within the form – this cannot contain spaces and should be relevant to the expected contents, for example name or telephoneNumber. This is a mandatory property for all components.
- **Validation Type**
  This option gives you a choice of various validation types such as email address, phone number, web address, number only or text only. If the data entered into the field doesn't match the format set here an error message will be displayed when the user tries to submit the form alerting them to alter their information.
- **Pre-fill**
  If users are logged into your site and have certain data already saved in their profile you can use this option to pre-fill fields with their data.
- **Indented** and **Label**
  If this box is ticked you can enter a label for your form component – this is the text that appears next to the component. There are two properties associated with this: **label** and **suffix label**. *Label is the text that appears to the left of the component and suffix label is the text that appears to the right.*
- **Label Width**
  This is the width of the label to the left of the component. The default width is 200 pixels. You only need to enter a number in this field, you do NOT need to enter pixels or px after the number.
- **Default Value**
  Anything entered in this property will be displayed in the form on the page when it is first loaded. The content can still be edited by the user in the final form.
- **Minimum characters**
  If a number is entered in this box an error will be displayed on the final form if fewer characters than specified here are entered. Putting a 1 in this property makes this component required/mandatory to be filled in before submitting the form.
- **Maximum characters**
  This specifies the maximum number of characters that can be entered into this component. Some components such as text fields will only allow this number of characters to be entered before stopping any more data from being entered, other components such as multi-text fields will display an error when the form is submitted.
- **Hide required asterisk**
  If a field is made required/mandatory, either by checking a 'required' checkbox or setting a minimum character of 1, a red asterisk will automatically be displayed next to the component. Ticking this box will hide this asterisk if you do not want it displayed on your form.

- **Width**
  This is the width of the component itself and can be set in pixels or a percentage. To use pixels enter only a number (no px, pixels etc) or to use percentage add a % to the value. Leaving this property blank will set the default width for the component.
- **Tie over?**
  Ticking this box will cause the next form element to be positioned on the same line to the right of this component. If the box is left un-ticked each component will go on their own line.
- **Tooltip**
  Any text entered here will be displayed in a small (usually yellow) pop up box when the user hovers over the form label. It is very useful for explanatory text if it is not clear what data should be entered into a certain field. A tooltip is indicated by an underline underneath the component label, this is usually a green dashed line but can be altered using styles.

Form components

Frame

This is a border around a set of other components that groups elements of a form together with a title, or label, in the top left corner. To edit the title/label click on the top left of the component where it says 'No label' and enter the title you want to appear in the frame in the Label box of the properties at the bottom of the screen.

Text Label

This is a component that allows you to enter text into the form without a corresponding input field. It is useful for introductions or explanatory text.

- **Text**
  Enter your text in this box. You can use the buttons above the box to format your text in the same way as you can for pages in the main editor including adding links
- **Suppress padding**
  By default some spacing in inserted around the text to separate it from it's neighbouring components. If you do not want this spacing to be added tick this box.
- **Frame**
  Ticking this box puts a frame around the outside of the text you have just entered. To make the frame the full width of the form rather than the width of the text enter 100% in the width property above.

Text Field

This is one of the most common components and it allows the user to enter data into a form field displayed on a single line. Without any validation settings applied this field can contain letters, numbers and symbols.

- **Personalisation field**
  This is a specialist component that is only in use on some websites. It is similar to the pre-fill component in that it automatically fills in this part of the form based on user data already held within the system.

Multi-Text Field

This is similar to a text field but can contain several rows of text.

- **Rows**
  This specifies how many rows tall the component appears to be on the form. This does NOT limit the number or rows of text that can be entered.
- **Personalisation field**
  This is a specialist component that is only in use on some websites. It is similar to the pre-fill component in that it automatically fills in this part of the form based on user data already held within the system.

HTML Field

This allows the user to format their information before submitting the form. It is useful on forums or where the submitted information is displayed on another page rather than data being submitted by plain text to an email address.

- **Controls**
  You can alter which options are available to the user using this property. ‘All options’ or ‘default options’ will display the entire range of formatting tools whereas ‘basic options’ will only display the simple toolbar.
- **Auto-extend height?**
  If this option is checked the text box will automatically expand in height if more rows of data are entered than the preset number.

Drop-Down Menu

This component allows you to specify a selection of values for the user to choose from.

- **Values**
  This is where you specify the options for the drop down. Enter one option per line (use the enter/return key to move to a new line).
- **Default value**
  Repeat one of your ‘values’ here to use it is the option that is initially selected when the form first loads. If this is left blank the top option will be used.
- **First option is not valid?**
  In some cases one of the ‘values’ entered will be an instructional value such as ‘Please select’. If the ‘Required’ box is ticked then a value must be selected before the user can submit the form, but if this option is ticked the form will ensure that an option other than the ‘instructional’ value has been selected. For this to work correctly the instructional value must be the first one in the list.

Date Field

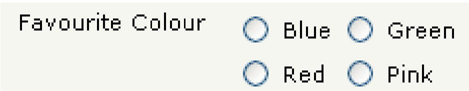
The date field allows users to enter a date in a specific, consistent format. This allows the date to be stored in a format that enables calculations to be made with the data. The permitted format is always displayed to the right of the component.

Checkbox

This inserts a single checkbox into the form – useful for a single 'I agree/I disagree' question or gaining permission for holding the users data. The text can be placed either to the left or the right of the checkbox.

- **Default Value**
  If this box is ticked the checkbox will already be ticked by default when the form loads. If left un-ticked, the form will load with the checkbox un-ticked.
- **Must check?**
  If this option is ticked then the check box must be ticked before the form can be submitted. This is useful for when permission to use the users data is required.

Radio Button List



This component is used when a user can only choose **one** value from a pre-determined list.

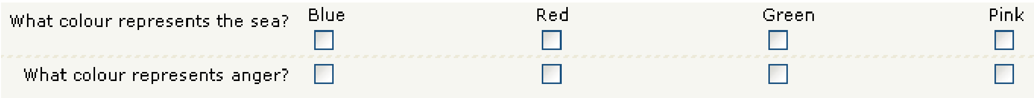
- **Values**
  This is where you specify the options for the list. Enter one option per line (use the enter/return key to move to a new line).
- **Default value**
  Repeat one of your 'values' here to use it is the option that is initially selected when the form first loads. If this is left blank no option will be selected.
- **Columns**
  This specifies how many columns across the form will be used to display the values. If this is left blank each option will be displayed on a separate line.

Checkbox List

This component is used when a user can only choose **multiple** values from a pre-determined list.

- **Values**
  This is where you specify the options for the list. Enter one option per line (use the enter/return key to move to a new line).
- **Default value**
  Repeat one of your 'values' here to use it is the option that is initially selected when the form first loads. If this is left blank no option will be selected.
- **Columns**
  This specifies how many columns across the form will be used to display the values. If this is left blank all values will be displayed on a single line, or wrap onto multiple lines if the maximum width is reached.
- **Hide value labels**
  This option is selected when you don't want each checkbox to have it's own label. This is useful when you have a grid of checkboxes with each column representing the same value, however you must still enter the necessary labels into the values box for the results of the form

to be displayed correctly when it has been submitted.



- **Value label position**
  You can set whether the label appears to the right or above the checkbox with this property.

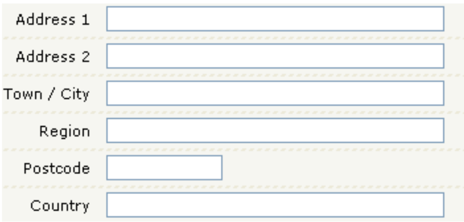
Image Upload

This component allows the user to upload an image from their computer.

File Upload

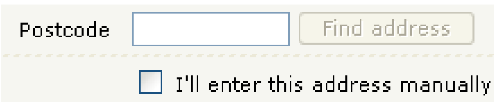
This component allows the user to upload a file from their computer.

Address Field

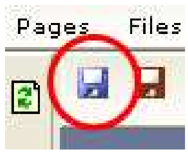


This component inserts a set of fixed text fields to allow the user to enter address details, without you having to create individual components for each separate line of the address.

- **Allow postcode lookup?**



If this option is checked, the address fields are reduced to a single postcode field with a 'Find address' button. This allows the user to enter just their postcode then select their house number from a dynamically generated list. The separate address fields are then automatically filled in with the rest of their address. There is an option for the user to manually enter their address instead if they prefer.



PLEASE NOTE: There may be an additional charge for using the postcode lookup option if it is not included in your website quote due to the cost of searching postcode data.

Saving and publishing your form

When you have finished editing your form click on the **blue** floppy disk icon above the form editor – do NOT click the red icon or you will not be able to add your form to a page.

To publish your form either right click on the form name in the left column and click 'publish' or wait until the form has been inserted into a page and publish the page. The form should be published along with it.

Adding a form to a page

To add a form to a page you must use a template with a form component in it. If a page can have a form inserted it will have a blue block where the form will go with ‘Form Component’ written on it.

If you need to change the template currently being used, right click on the page name in the left column and select ‘properties’. You will then be able to select a new template from the drop down list.

Right click on the blue ‘Form Component’ block and select Properties... You can then set specific details for this form:

- **Form**
  Select the correct form from the drop down box. The names here are the same as the names in the left column of the form editor.
- **Post to URL (Advanced option)**
  This is used when the data submitted is to go directly to another page rather than the data be sent via email. This can be left blank in most cases, if you are unsure then do not use this option.
- **Email submissions**
  This is where you enter the email address(es) where you want the form data to be sent to when it is submitted. You can enter multiple addresses by separating them with a comma e.g. joebloggs@mywebsite.com, suesmith@yourwebsite.com.
- **Email subject**
  This is the subject that will be used when the results are sent to the specified email address(es)
- **Success text**
  When the form is successfully submitted the form will disappear from the page and be replaced by the text entered here. It can be formatted using the toolbar options above the text box.
- **Send button label**
  This is the text that will appear on your button at the bottom of the form.
- **Send button width**
  This sets the width of the button at the bottom of the form.
- **Send button centred?**
  if this option is ticked the button will automatically be centred beneath the form.
- **Send button indent**
  If the send button is not centred you can set the width of the indent from the left here.
- **On success page**
  When the form is submitted, the default option is to reload the same page minus the form with the ‘success text’ in its place, however you can choose to redirect the user to a different page instead, for example to allow them to download a document once they have supplied their details. Click the browse button to locate the next page.

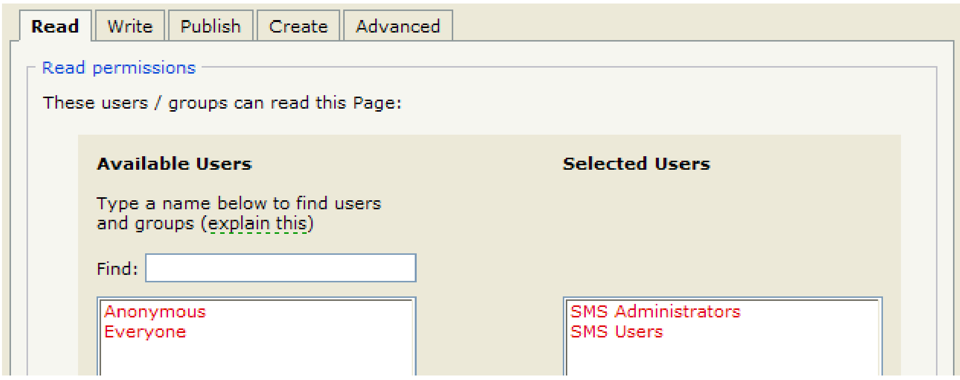
Advanced Forms

Setting up a Form Database

A form database allows you to record and collate the details of forms submitted on the website within a database. This data can then be exported and queried directly, removing the need to copy and paste data from an email.

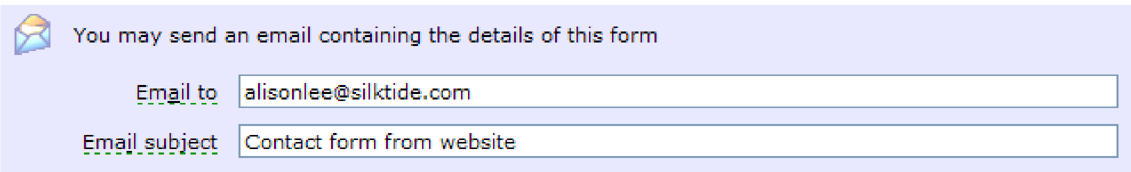
Creating the template

Firstly you will need to create a page using the **Record Interface template**. Create this page in an area that you can access with a login through the website. Change the permissions of this page (right click on the page name in the left column and click '**Permissions**') so that only relevant groups and users can view the page once logged in (usually administrators only but always make sure the anonymous group is removed from the read permissions).

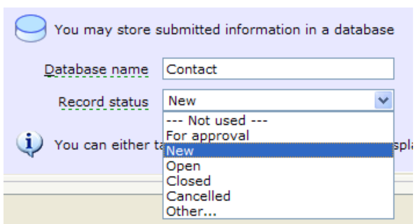


Configuring the form

You will need to configure the form to point to a unique database within your site. To do this, edit the page with your form on, right click on the form and select properties (if you don't have a relevant form already in place follow the steps in the previous section to create a new one). There are several different options available in the form properties dialog. If you want the form results to be emailed as well as entered into a database, enter the appropriate email address(es) and subject in the relevant boxes.



Enter a database name into the next box. This must be a **unique** name and cannot be changed at a later date. The database will automatically be created the first time the form is used. In the drop down box below, choose the status that you would like new form data to be given when it is first

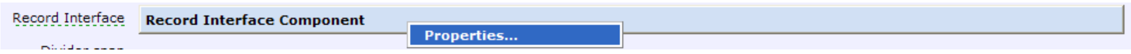


entered into the database (usually new or open).

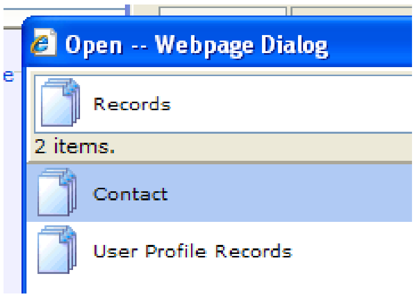
Fill in the success text and/or email text as you would on a usual form, then click OK and save the page. Finally, view the form page in your browser and fill it in to create the database.

Setting up the Record Interface

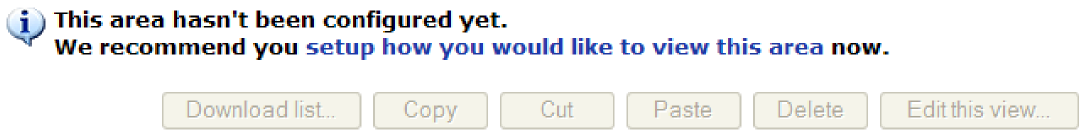
To set up how the form details are viewed through the interface, edit the Record Interface page you created earlier, click on the plain editor tab above the page editor and the formatting toolbars, right click on the 'Record Interface Component' blue bar and select properties.



Click the browse button at the top of the new window, navigate to the **Records** folder (from the top level) and select the database you created for this form then click OK. Click OK again to exit the form properties and save the page.

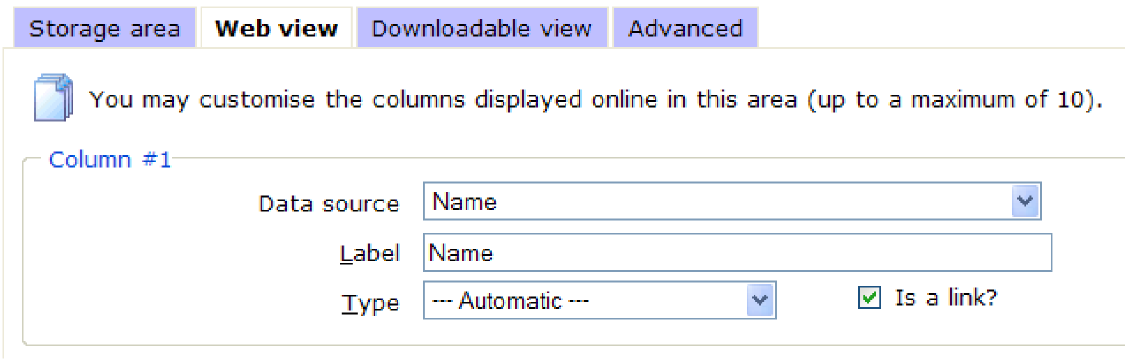


View this page in your browser and click the "**We recommend you setup how you would like to view this area now**" link.



On the **storage area tab** you can leave the default settings as they are, or if you wish to modify how the form data is grouped or sorted you can do this in the 'Sort by' section of this tab. It may be easier to set these after the other settings have been put in place.

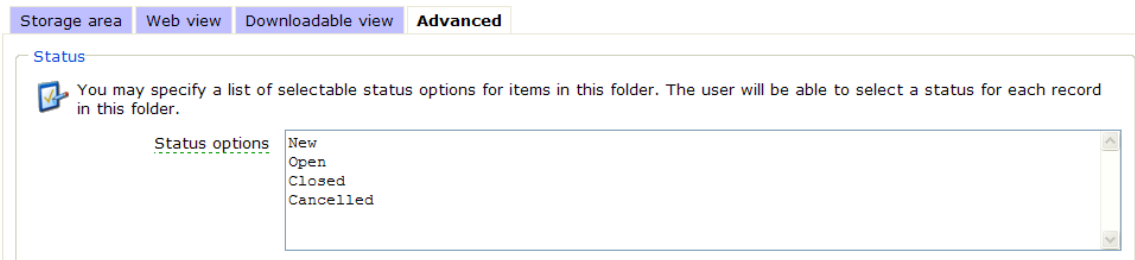
Click the '**web view**' tab. This sets up how the data is viewed on the web via this interface. It is generally a good idea to display the basic or most useful information on this page and make one (or more) of these a link to the full set of data. In the data source drop down box select the field name for the information you wish to display in the first column, give it a label in the next box and choose it's data type in the drop down box below this one (select automatic unless displaying a date, yes/no answer or an image). To make this piece of data a link through to the full set of submitted data click the 'is a link' checkbox.



Repeat until you have set up all the columns you require (up to a max of 10). Click OK to save this information and to see how the data is displayed on your page. If you wish to make changes to how this currently appears click the '**Edit this view**' button which will take you back to the tabbed edit section. Click on '**web view**' again and make the necessary modifications.

To set up how the data will look when it is downloaded click on the '**Edit this view**' button then the '**downloadable view**' tab. This is set up in the same way as the web view with the exception of setting any data as a link. It is a good idea to create a column for each and every piece of information that is submitted via the form so that all the information is present when it is downloaded. Click OK to save your changes and go back to the main screen.

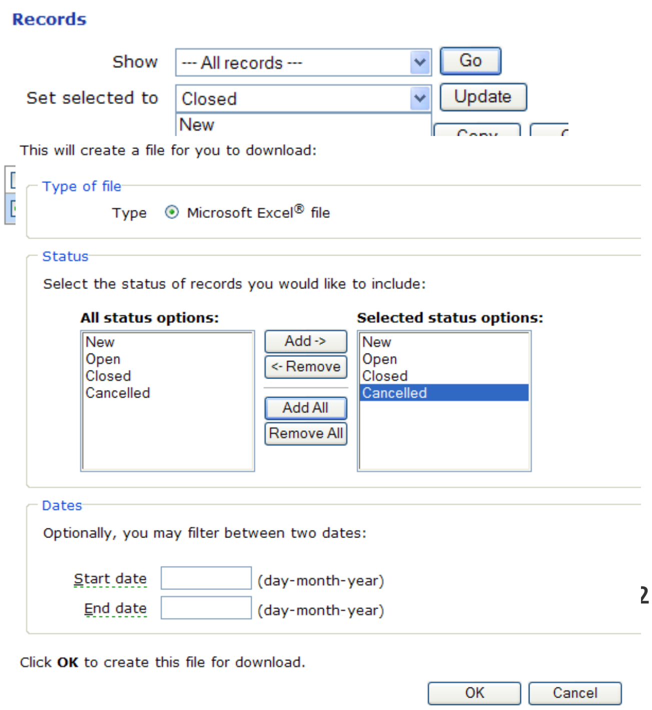
You can set different statuses for records of data held, e.g. new, closed, cancelled. To create the statuses click the '**Edit this view**' button then the '**Advanced**' tab. In the 'Status options' box enter each status you would like to use, each on a new line.



Click 'OK' to save the changes. You will now be able to set records to their appropriate status or sort by status by using the drop box boxes on the main 'Records' page.

Downloading the data

To download the form data click the '**Download list' button**. You can modify what information is downloaded here by selecting only records with a

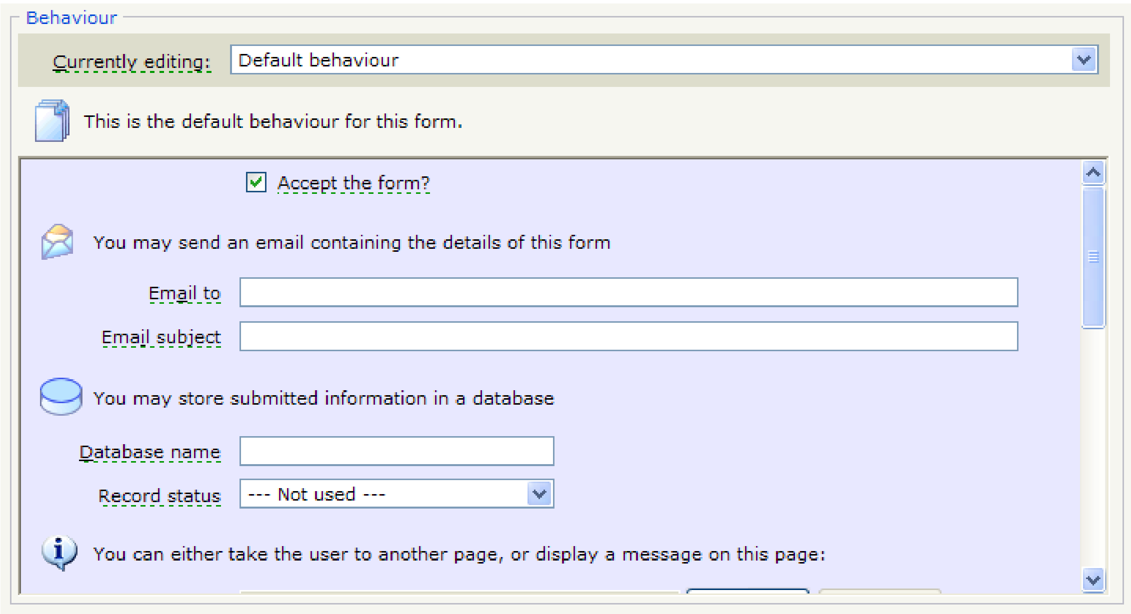


certain status, or by limiting the time span of the data. The statuses in the right hand box will be the records that are downloaded so to download a complete list, ensure that all status types are listed here. The system will remember your settings next time you want to download your data but you can make further changes at a later date if you wish.

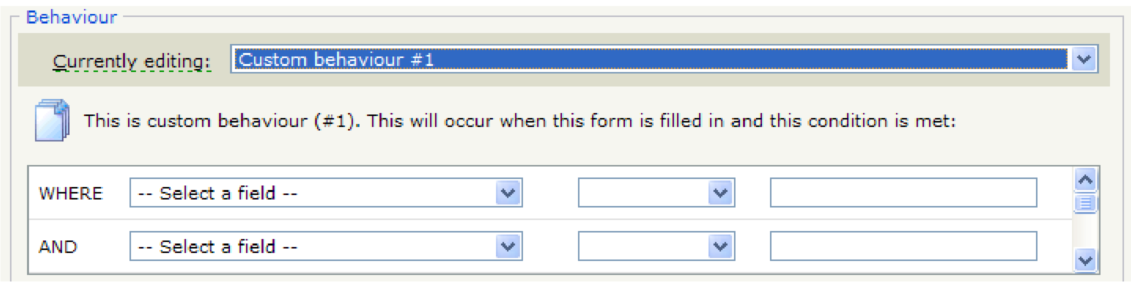
When you are happy with your selection click the '**OK**' button and you will be given the option to open or save the final spreadsheet. If this option doesn't appear make sure your browser is not blocking file downloads or pop ups.

Custom behaviours

Forms can be manipulated to behave in different ways depending on the content of the form that is being submitted. To do this you need to set up a different custom behaviour for each action. Initially the form properties shows the '**Default behaviour**'. This is how the form responds when there are no custom behaviours set, or the form content doesn't match any custom behaviour parameters, so the details in the blue box should always be defined for this.

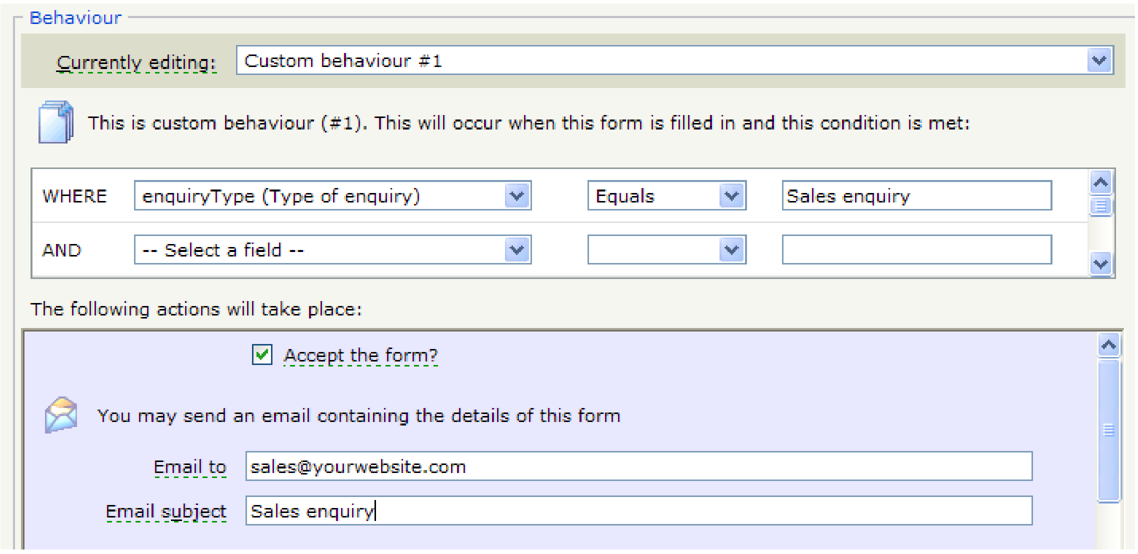


To create a custom behaviour use the drop down box labelled 'Currently editing' to select '**Custom behaviour #1**'. Two rows of extra options will appear and the blue box of properties will refresh to show you blank fields. You can now set the conditions of this behaviour along with the relevant actions to be taken.



The conditions for this behaviour are set by indicating which fields should be looked at when the form is submitted and evaluating these against their individual conditions. This is done by selecting the relevant field from the first drop down box (this is a list of all fields you have created when setting up your form), the condition type from the second and appropriate text in the text field. You can apply up to 5 conditions for each custom behaviour. The relevant actions to be taken if these conditions match the form content is then specified in the blue box below the conditions in the same way as the default behaviour.

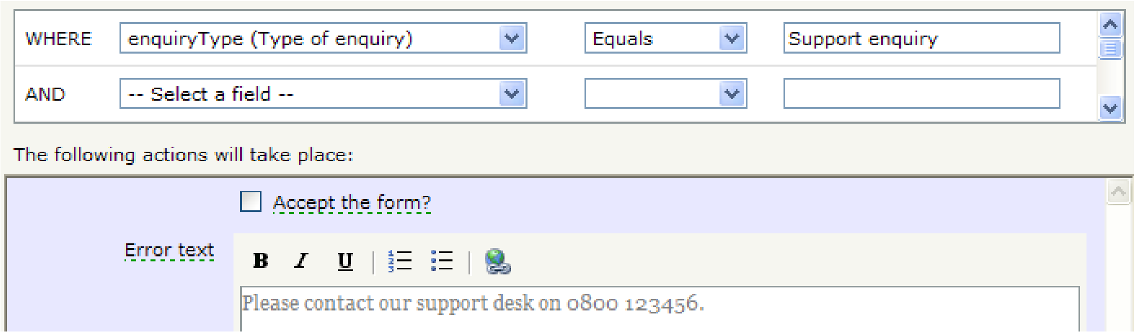
For example, if you wanted all forms that contained a sales enquiry to be emailed to sales@yourwebsite.com you would enter the following information:



In this instance anyone who selected ‘Sales enquiry’ from the drop down box on the form labelled ‘Type of enquiry’ would have their form data sent to sales@yourwebsite.com, if they had selected any other option from the drop down list the form would have used the default behaviour instead.

Note: You must be careful when entering the condition text as any spelling or typing mistakes can cause the condition to become invalid e.g. **Sales enquiry** wouldn’t produce the same results as **sales nquiry** or **“Sales enquiry”**.

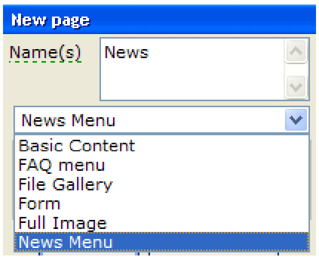
You can also set a behaviour to only accept the form contents if a certain condition is met, otherwise it will display a custom message to the user. For example you could specify that if anyone selects the ‘Support enquiry’ option and submits the form it could display a message to the user saying “Please contact our support desk on 0800 123456”. This is set up by deselecting the ‘Accept the form?’ box then entering the custom message in the box that appears.



Up to twenty custom behaviours can be set on a form, along with the default behaviour. Each behaviour can be modified to send to different email addresses, different databases, display different success text, direct the user to a different page or send the user a different email depending on how they filled in the form.

News Menu and Articles

A news menu displays a dynamically generated list of your news articles, usually showing the article title, date, a thumbnail image and an extract of the article (this can be customised by the developer). Each article is created as a separate page, which is then automatically added to the menu. Clicking on a article title in the menu takes the visitor to the full article.

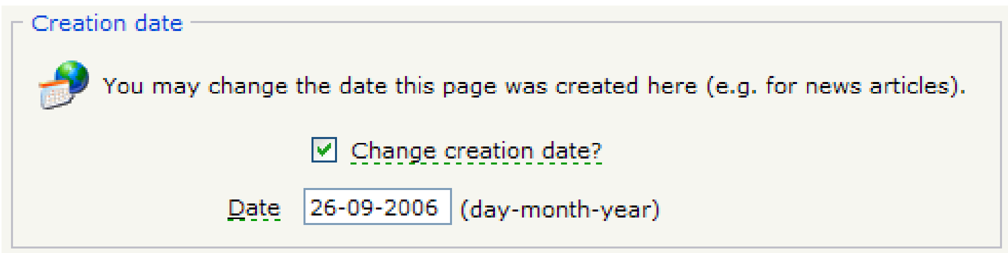


Create a page in your site called News (or Latest News etc – whatever you would like it to be called) and make sure you have selected the **News Menu template** (this comes as standard with the latest version of Site Manager – if you do not see it in your list of templates you may not have this functionality currently available).

Once this page has been created, double click on its name in the left column to create sub-pages. You will need to create a separate page for each article ensuring that you use the **FAQ/News Article template** for these new pages.

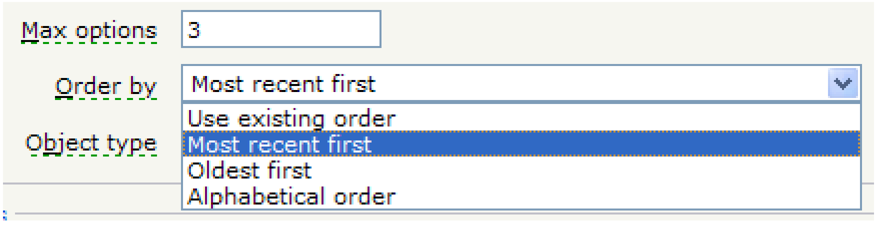
Edit the news articles in the same way as editing a ‘normal’ page by adding your content text and an image if required, then save the page. Repeat this for each article then when you have added all your articles preview your site and view the ‘News’ page. You should see a list of all your articles along with a thumbnail of the image you added, the date it was created and an extract of the text.

The date of each article displayed is the date that the page was created. You can change this date to the date the article was written by **right-clicking** on the article in the left column of the editor and clicking on **properties**. Click on the **Advanced** tab on the far right and you will see a section called **Creation Date**. Tick the box that says ‘Change creation date’ and a date field will appear underneath it. Enter your required date into this box and click OK.



Refresh the menu in the site preview and the date of your article should have changed. By default the menu displays articles in order of descending date with the latest article at the top so you may find that changing the creation date also changes the order the articles are displayed in.

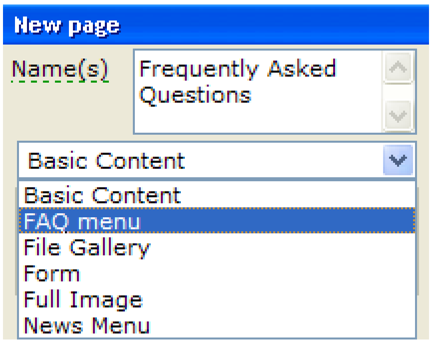
If you wish to limit the number of articles being displayed on the menu, edit the News page, **right click** on the menu of articles and click **properties**. About halfway down the properties dialog box there is an option labelled '**Max options**', enter a number into this box and the menu will never display more than this limit. You can also alter the order of your articles by selecting a different value from the drop down box below this labelled '**Order by**', although for news articles it is recommended to have the latest news at the top of the menu. When you have made your changes click OK.



When you are happy with your news articles publish the menu **and** all of the sub-pages for them to appear on your live site.

FAQ Menus

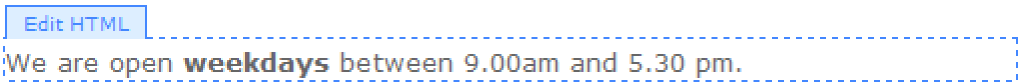
FAQ menus are a dynamically generated list of your Frequently Asked Questions. Each question is created as a separate page, which are then automatically added to the menu. Clicking on a question in the menu causes the menu to 'open' and the answer to appear underneath the question.



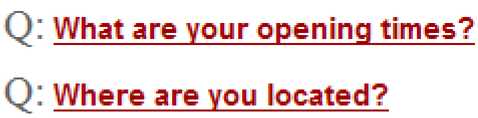
To create your FAQ menu create a page in your site called Frequently Asked Questions (or FAQ – whatever you would like it to be called) and make sure you have selected the **FAQ Menu template** (this comes as standard with the latest version of Site Manager – if you do not see it in your list of templates you may not have this functionality available).

Once this page has been created, double click on it's name in the left column to create sub-pages. You will need to create a separate page for each question with the page titles being in question format. You can create several pages at once by entering all your questions into the Name(s) box and pressing the return (enter) key after each question. Ensure that you use the **FAQ/News Article template** for these new pages.

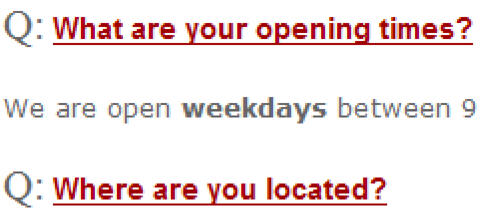
To add the answer for a question, click the **edit** link next to a question and enter the answer text into the editable text area underneath the page title (in the same way as entering text on a 'normal' page). You can enter as much or as little text as necessary here. In most cases we don't recommend formatting this text using headings etc as this will effect the appearance of the FAQ menu, however using bold, italic and underline to highlight text is fine.



Save your page and repeat this for each question. When you have added all your questions preview your site and view the main Frequently Asked Questions page. You should see a list of all your questions preceded by " Q: ".



Click on a question to reveal the answer (clicking on the same question again will close this answer).



When you are happy with your FAQs publish the menu **and** all of the sub-pages for them to appear on your live site.

Discussion Forums

About Forums

Forums are a powerful and flexible component within Site Manager allowing you to engage in 2 way conversations with your website audience. Forums can be of several types including traditional bulletin boards, chat rooms and polls. Forums are not a standard feature of Site Manager and need to be purchased separately.

Using Forums

Reading threads

Depending on the security settings of your forums, the first step for most users will be to take a look at the existing messages which have been added to see if your website is for them.   Forums are generally structured in a hierarchical manner with general topics at the top level followed by threads, for instance 'General Discussion' might be a top level topic with 'What do you think about xyz?' as a thread. Replies to the first item in the thread are shown underneath it, generally in chronological order.


Welcome to [illegible]'s Forum

Name	Started by	Last updated
Common area (147) NEW	[illegible]	02:30pm 29-08-2006
[illegible] (16) NEW	[illegible]	10:15am 29-08-2006
Successful treatment? (43) NEW	[illegible]	09:32pm 28-08-2006
[illegible] website/forum (18) NEW	[illegible]	02:33pm 23-08-2006
2 week wait (23) NEW	[illegible]	08:41am 20-08-2006
More to life? (2) NEW	[illegible]	05:26pm 15-08-2006
Celebrations (11) NEW	[illegible]	07:57am 28-06-2006
Male Issues (4) NEW	[illegible]	09:27pm 27-06-2006
Inbetweeners (6) NEW	[illegible]	06:09pm 11-02-2006

A list of topics with the number of 'child' threads indicated in brackets.


Start New Discussion... Mark all as read...

Name	Started by	Visits	Last updated
At last they're here! (6) NEW	[illegible]	110	07:57am 28-06-2006
My lovely [illegible] have arrived (4) NEW	[illegible]	81	06:59pm 25-06-2006
A Big THANKYOU To [illegible] Once Again (2) NEW	[illegible]	97	08:42pm 30-05-2006
[illegible]'s news!!! (7) NEW	[illegible]	160	10:54am 1-02-2006
[illegible] (2) NEW	*Made anonymously*	85	03:23pm 6-12-2005

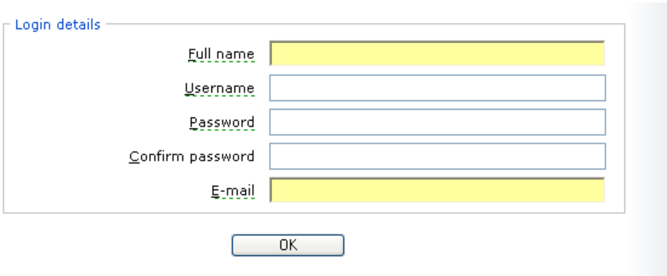
A list of threads within a Forum topic with the number of replies indicated in brackets and the number of times the thread has been read in the 'visit' column. The most recently updated thread is shown at the top.

Registering

In general, registering and logging in gives site visitors the ability to post their own messages. There are some exceptions (depending on your configuration) so the below may not apply exactly to your website.

Unlogged in visitors are usually presented with 2 options; log in with their details if they have already created an account, or create an account through the registration form.

The registration form generally asks for a minimum of 4 fields; the user's real name, their email address, their desired username and their desired password. The password field is often repeated to ensure people type it correctly.

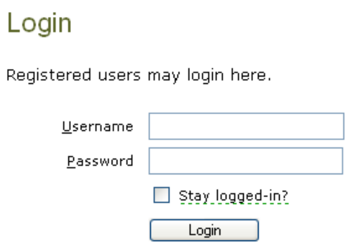


Once they click OK, Site Manager processes the registration form and sends an email to the email address which was added. This is to prevent the use of fraudulent or nonsense accounts. The email contains a link which the user needs to click on for their registration to be successful.

Once registered, a user can then access the forums by correctly typing their username and password to the login form (see below)

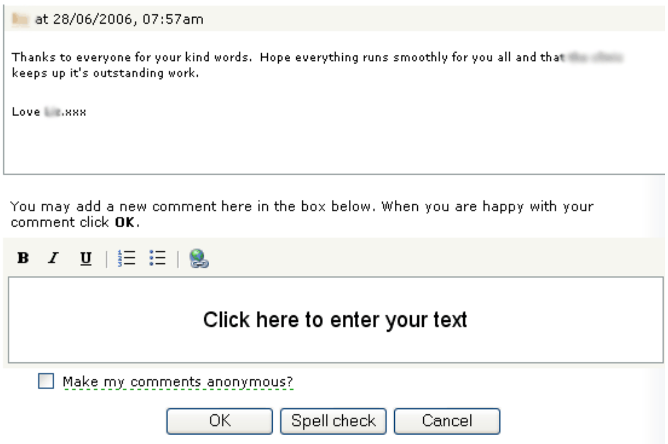
Logging on

To reply to a thread, a user must first be registered and secondly logged in to the website. To login they should to the Login form which asks for their username and password. If these are typed correctly and match a user account on the system, they are given access to the forum with an appropriate level of security.



Replying to a thread

To reply to a thread, a user should visit the relevant thread and scroll to the bottom of the page. This will show a simple text box with 'Click here to enter your text' clearly marked inside. Clicking anywhere inside the box will make this disappear and allow the user to write whatever they wish, formatting it with the simple bold, italic and underline tools. Links appear automatically when they are typed in directly (e.g. www.bbc.co.uk) or can be 'hidden' by typing some text (e.g. 'the BBC website') and using the link icon 

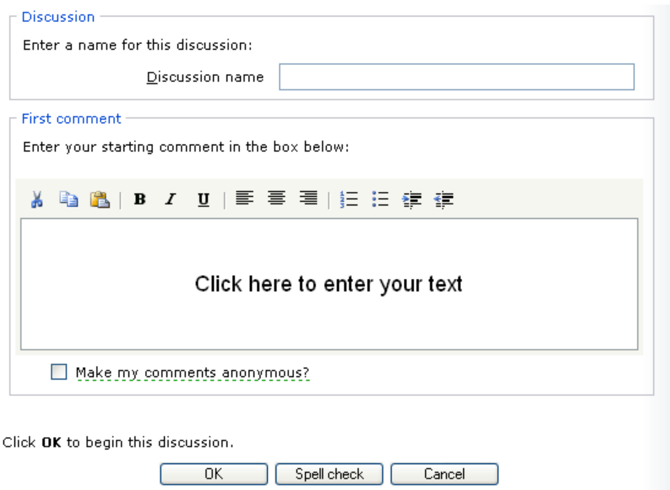


The spell check tool does work, however it can be fairly slow to run particularly on long entries or on busy websites, so we encourage users to manually check their own spelling as they go along.

Adding a new thread

To add a new thread, users should visit the list of threads within a topic and click the 

button. Adding a thread works in exactly the same way as replying to one, except users also need to add a thread title.



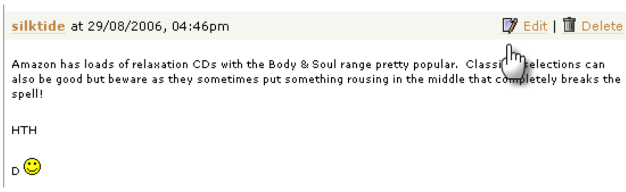
It is not uncommon to restrict the ability to create new threads.

Administering Forums

Once a thread reply has been added, it can only be edited by a **moderator** or administrator.

Editing a thread

If you are logged in as a moderator or administrator you will see 'edit' and 'delete' button over every thread you have permission to moderate.



To edit a thread, click the Edit button and amend the entry in exactly the same way you would add one.

NB Edited threads display a note to that effect

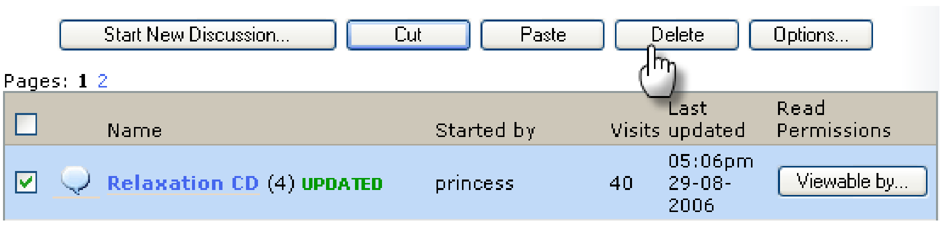
This post was modified by administrator on 29/08/2006, 05:02pm

Deleting a thread

To delete a thread, either click the Edit button and then the Delete button on the Edit page, or click the Delete icon above the thread. You will need to confirm you wish to permanently delete the item before deleting it.

Deleting multiple threads

When logged in as an administrator it is possible to delete multiple threads at the same time by ticking the checkboxes to the left of the threads and clicking Delete on the Administrator's toolbar.



Creating new moderators

This can only be done by site administrators and should only be done by those who know exactly what they are doing! For security and brevity reasons the steps aren't noted here so please liaise with your Silktide contact to set up new moderators.

Activating and Configuring Forums on your site

Forums are perhaps the most complex tool available within Site Manager and often take considerable configuration to get 'just right' for the needs of your website.

Common configuration options such as identifying who can create new threads, which users can moderate them etc. is relatively straightforward, however there are really too many options to note in a beginners training manual!

Please liaise with your Silktide contact to get your forum configured in the most appropriate way.

Video

In Site Manager you can add streaming video to your website that users will be able to watch even on slow bandwidth internet connections.

Convert your video

Site Manager accepts video in the FLV format. This is a standard Video format for streaming Video over the web using Flash.
Normally you will start with a video in either of the following formats.

- Mpeg
- Avi
- Mov

You will need to use Macromedia Flash 8 Video Encoder to convert your video into an FLV file. This will convert it to a smaller file size for displaying over a web-browser.

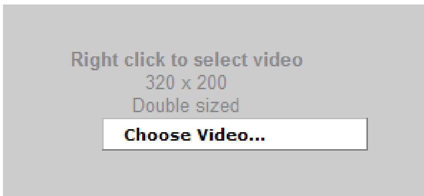
Consult your software for how to convert a video file to FLV format.

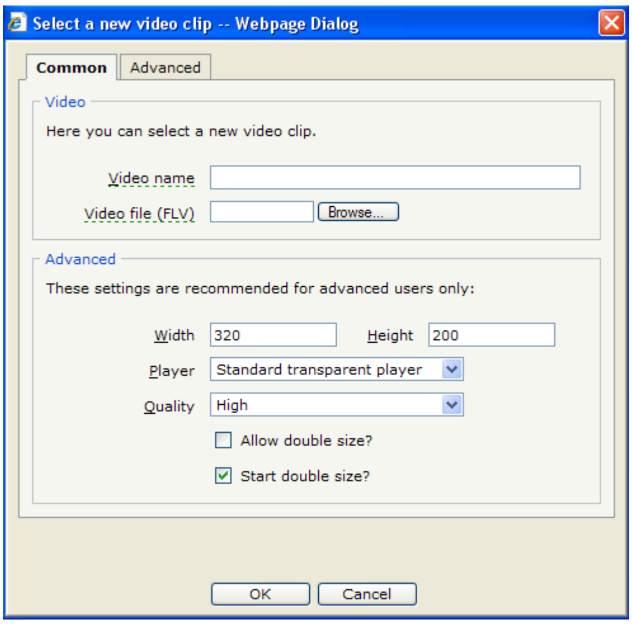
If you do not have the means to convert the video, Silktide can do this for you.

Adding your Video to a page

To add a video to a page you must use a template with a video component in it.

Right-click the grey box where the video should appear and click “Choose Video…”





Click **Browse** and select your FLV formatted video file.

Specify the size of the video in the **Width** and **Height** boxes.

Select whether you want the video to start double size or not by selecting or deselecting the **Start double size** option.

Enter a name for your video.

Press **OK.** Your video will then upload and play automatically.

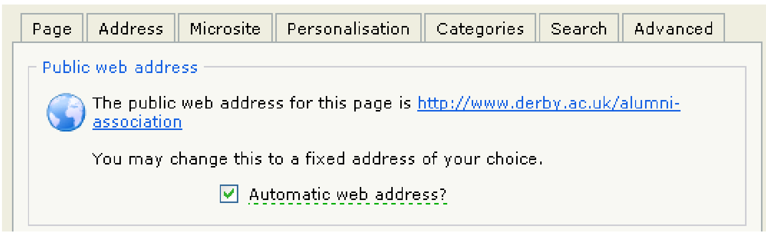
Advanced Features

Custom web addresses

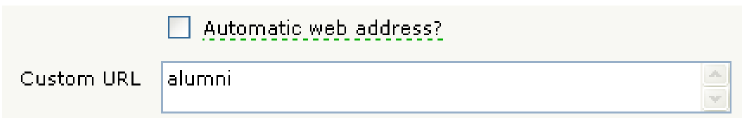
'Friendly' URLS are web addresses that are written in a form that is easily read and understood. If this option has NOT been turned on, the addresses for your individual pages will look something like this: http://www.website.com/?node=165, which isn't clear about the content of the page. If friendly URLs have been activated, your addresses will be in the form: http://www.website.com/about-us. This is more understandable to both your visitors and more helpful in search engine results.

Friendly URLs are based on the title of each individual page but with hyphens (-) in place of spaces. Punctuation such as apostrophes are removed and if another page with an identical title already exists an incremental number will be added to the end e.g. /about-us2.

You may wish to manually select what the address of certain pages are going to be, for example if a page has a very long title or it is several levels deep in your site you may want a short address for it. To do this **right click** on the page you wish to change and select **properties** then the **address** tab.



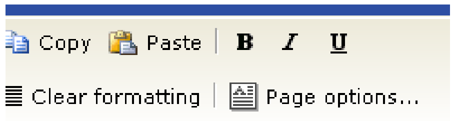
Within the address tab there is a checkbox labelled **Automatic web address?** If this is ticked the name of the page will be used as the address. Un-tick this box to edit the address and a text box will appear underneath it labelled Custom URL.

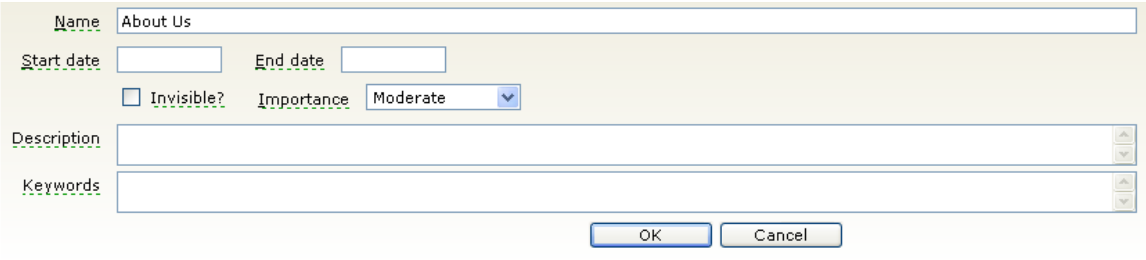


The text you enter in this box will appear on the end of your main web address e.g. http://www.mywebsite.com/alumni. Spaces cannot be used within this text so use hyphens (-), underscores (_) or forward slashes (/) instead. The text MUST start with a letter or number NOT a character so _alumni is not allowed.

Page options

Various settings such as search importance, keywords and descriptions can be modified on an individual page basis. To modify these, open a page in Site Manager by clicking on the edit link next to the page title in the left column and click the '**page options…**' button on the formatting toolbar. Several options will appear underneath that can be customised.





Name

This changes the title of the page so altering this would change navigation elements and page title. This works in the same way as **rename** from the properties menu of a page.

Start date and end date

This is used when a page is only to appear on the site between certain dates. When the date falls outside of the range specified the page automatically becomes invisible and is no longer displayed on the site. This is useful for date dependent pages such as upcoming events. The end date should be entered as the day **after** the final date the page is to appear, this way the page will be displayed until midnight of the desired day.

Invisible

If the invisible box is ticked, the page becomes invisible to menus, navigation and site maps, however, the page can still be accessed on the site via direct links.

Importance

This allows you to set the importance of a page for use with the site's own search component but does not affect external search engine results. Use the drop down list to specify the required level of importance for that page. Pages marked 'Very high' will appear higher in the search results than pages with lower importance. You can also specify that a page doesn't appear in search results at all by selected 'Not searchable' from the list.

Description

Enter a description of the page content here. This description will appear in the META tags of this page and may be used by search engines.

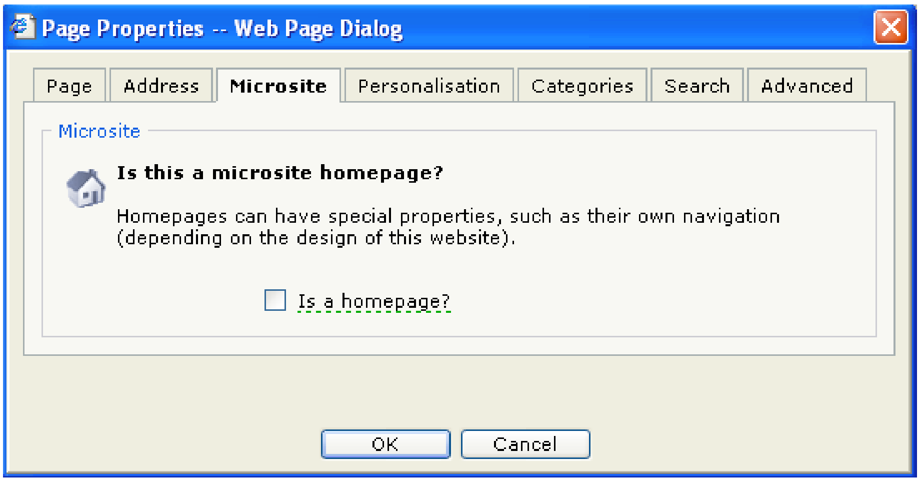
Keywords

You can specify individual keywords for a page here (separated by commas) and they will be displayed in the META tags of this page.

Microsites

Some websites will use ‘microsites’ – this is like a small website/section within your main site that has its own homepage. Pages within this microsite will have navigation, breadcrumb trails etc relating to this section of website only. This is very useful for large websites that have their own internal departments that may require their own style – it also helps simplify navigation.

To make a page the homepage of a microsite **right click** on its name and select **properties**. Select the **Microsite** tab at the top of the properties and tick the **Is a homepage?** box.



A micro-site homepage can be identified by its home icon instead of the usual page icon.