

How-To Manual for Web Site Building and Maintenance

Introduction

This guide contains the basics of how to use and manage your Web Solutions content management system. The best way to learn the ins and outs of the system is to experiment with the different functions while you're in the staging phase, but this guide will help you through some basic operations.

Before You Start

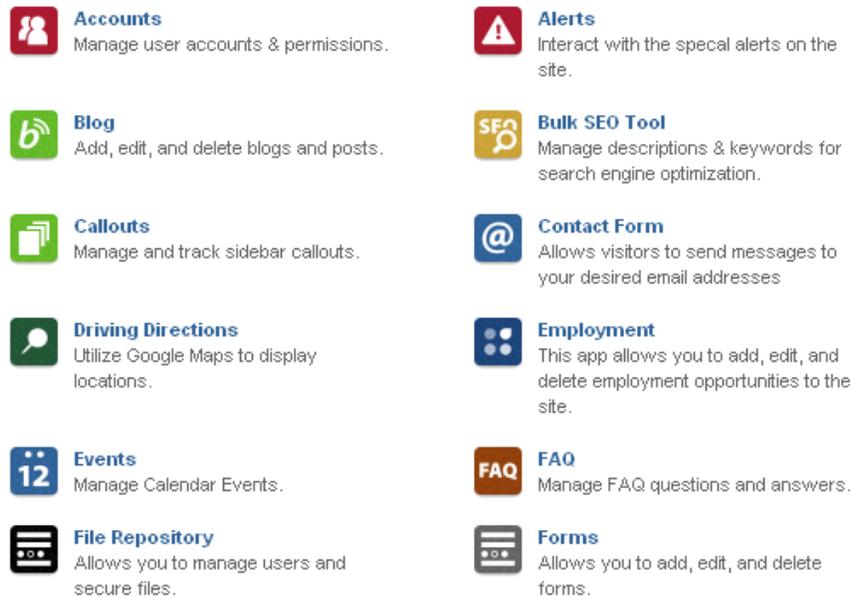
We recommend that at least two people from your church receive Web Solutions training. We require that at least one staff member have access to the site.

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Administrative Management

When you login, you will be directed to the Control Panel page. You can access many of the Apps management tools from the Control Panel page (i.e. Blog, Events, FAQ, etc). Alternatively, you can manage pages and apps on the site by navigating to those pages.



How to Create and Manage User Accounts

- Each account can have an unlimited number of users with unique user names.
- From your Control Panel, click on Accounts.
- Click New User.
- Enter the username, password and e-mail address.
- Check the Can Login box to make them an active user.
- If you want this particular user to have administrative capabilities, click the Admin box. To edit or create pages, a user need not have administrative capabilities. Only one or two users should have these capabilities, which allow you to manage the behind-the-scenes operations of the site and to control user permissions.

How to Edit Permissions for a User

- Editing the Permissions for each User allows you to specify what each User can do on each page or module of your site.
- We recommend that only Users who have had the full Web Solutions training have delete capabilities.
- From your Control Panel, click on Accounts.
- Click on the Permissions link next to the user for whom you'd like to edit permissions.
- Custom select the capabilities each user has for each page of your website by clicking on the circles, Xs and checkmarks in the fields corresponding to each site. Three

checkmarks in the “Entire Site” field means that this user has full editing and deleting capabilities on your entire site.

OR

- To edit permissions for a particular page, go to that page and select Permissions from the More menu at the top of the page.

How to Change Your Password

- From your Control Panel, click Reset Password.
- Enter your current password and your new password. Confirm your new password and click Save.

How to Delete a Module/Application from Your Site

- Please contact the diocesan Communications Office.

How to Track Visitors Using Google Analytics

- Visit <http://www.google.com/analytics/>. You must either log-in with an existing Google username and password, or create a Google username and password.
- Once you sign in, click the Sign Up button.
- You have two options: Web Site and App. Make sure that Web Site is selected at the top of the screen.
- Enter the name of your site (St. Swythen’s Church), the URL (<http://www.stswythens.com>), the industry category and time zone. Create an account name, then enter your country and time zone and hit continue. Create an account name (St. Swythen’s Analytics). At the bottom of the screen, you’re given two options for data share settings – these are up to you.
- Click Get Tracking ID. You’ll have to accept the terms of service.
- Once you’ve agreed to the terms of service, you’ll be directed to a page that has tracking information. Copy the tracking code.
- Now go to the Control Panel of your site and click on Site underneath the Site Administration section. Then click on the Stats tab.
- Enter the username and password you created for your Google Analytics account. In the Link to Login Area field, type <https://www.google.com/analytics/settings/>.
- In the Analytics Code field, paste the code that you just copied from your Google Analytics account. Click Save.
- Now, when you log-in and look at your Control Panel, you’ll see a link to Google Stats. Clicking on this link will open your Google Analytics account in a new window. You can see the number of visits to your site, and click View Report to get a breakdown of what pages they visited, how they found your site, etc.

How to Administer Search Engine Optimization

Search engine optimization (SEO) is the process of modifying your website to improve the visibility of your site. This can involve the addition of keywords, reorganizing the site or restructuring your URLs.

Users with SEO administrative privileges can enter these terms using the Bulk SEO tool on your administrative dashboard. You will also see an SEO tab with all of these corresponding fields (meta title, meta description, etc.) on every edit screen, where you can enter your keywords using the following guidelines:

The **Meta Title** is the first thing the search engine sees; it's the clickable link in the search engine results. It also displays in the very top of the browser window. The most important keyword phrases should be placed here, totaling no more than 66-70 characters, including spaces. Titles should be unique and accurate.

The **Meta Description** is a 1-2 phrase summary (no more than 150 characters) of the content on a page. This is the blurb that appears on the search engine page.

Other terms:

- Meta Keywords – 5-10 Keywords that show up on the page that are most important, separated by commas
- Alt/Title Tag – usually same as Meta Title but with a few variations, typically shorter
- Footer Text – usually same as Meta Title and alt/title, but you can reword the sentence

What are some rules to follow for SEO?

1. Create separate keywords and optimize each page of your site for the best results.
2. Be consistent in your keywords and phrases.
3. The broader the keyword, the more competition there is for it.
4. Make sure your URLs are simple to understand: stswythens.com/worshiptimes is preferred over stswythens.com/wrshp_Sun_a.m. The URL is displayed in the search result, so it should be recognizable.

Where can I look for help?

Google offers two free resource guides that are very helpful to churches looking to improve their Web ranking and focus on SEO. Some of the content is rather advanced, but each document contains a few basic guidelines that are truly helpful.

1. Google Webmaster Guidelines, <http://www.google.com/webmasters/>
2. Google's SEO Starter Guide, https://static.googleusercontent.com/external_content/untrusted_dlcp/www.google.com/en/us/webmasters/docs/search-engine-optimization-starter-guide.pdf

How to Choose & Change Your Template

You have two template options to choose from. The Default Template has a vertical navigation bar and a more traditional feel. The Advanced Template has a horizontal navigation bar and a more modern feel. The Advanced Template is limited in that the navigation items cannot exceed the horizontal length of the page – so you must limit

the number of navigation items and the word count of those items. Also, the space on the homepage for original content is smaller.

You can switch between the two templates at will to test them out and see what works best for you.

1. From the Control Panel, select Site under Site Management.
2. Scroll down in the General Information tab, and use the Template pull-down menu to select which option you'd like to use.

Example of Default: <http://admin.thediocese.net/default.asp>

Example of Advanced: <http://testsite.thediocese.net/default.asp>

Page & Content Management

The page editor is designed to let you update your web site as quickly and easily as possible, and if you've ever used a word processor, you'll feel right at home. When you "Add a Page" or "Edit a Page" on your web site, a new window will pop up, displaying the current content on the page and giving you a full menu of tools that you can use to make the necessary changes. Below is a list of the functions available to you, along with a description of what each one can do.

Menu Button	Function	Description
	Cut	Perform normal function of cutting
	Copy	Copy the current selection and store it in the clipboard
	Paste	Insert content from the clipboard into the Editor at the selected position
	Paste from Word	Paste the content copied from the Microsoft Word and remove the web-unfriendly tags
	Undo	Undo the last operation in the Editor
	Redo	Redo the last operation in the Editor
	Insert Image	Insert an image at the selected position in the Editor and set its properties
	Insert / Edit Image	
	Insert / Edit Embedded Media	
	Insert File	Insert a link to a document on the server at the selected position
	Insert a Table	Insert a table into your web page
	Table Row Properties	Edit properties of the selected table row

	Table Cell Properties	Edit properties of the selected table cell
	Insert Row Before	Insert a row before the selected row
	Insert Row After	Insert a row after the selected row
	Delete Row	Delete the selected row
	Insert Column Before	Insert a column to the left of the selected cell
	Insert Column After	Insert a column to the right of the selected cell
	Delete Column	Delete the selected column
	Split Merged Table Cells	Undo a table cell merge
	Merge Table Cells	Merge the selected table cells into one cell
	Bold	Bold the selected text
	Italicize	<i>Italicize</i> the selected text
	Underline	<u>Underline</u> the selected text
	Align Left	Align the selected content to the left
	Align Center	Center the selected content
	Align Right	Align the selected content to the right
	Align Full	Justify the selected content full

	Ordered List	Insert a numbered list
	Unordered List	Insert a bulleted list
	Out-dent	Undo the indented format for the selected text
	Indent	Indent the selected content
	Subscript	Change the selected text to subscript
	Superscript	Change the selected text to superscript
	Strike Through	Strike through the selected text
	Insert Horizontal Ruler	Insert a horizontal line at the selected position in the Editor
	Insert / Edit Link	Add (or edit) a link to the text on the page
	Unlink	Remove the hyperlink from the selected content
	Insert / Edit Anchor	Add (or edit) an anchor to the text on your page
	Remove Formatting	Remove the formatting from the selected text – remember that best practice is to strip the formatting in Notepad or TextEdit first.
	Cleanup Messy Code	Clean up all “garbage” HTML tags
	Edit HTML Source	View and/or edit the page with HTML coding

How to Insert a Photo Header

This is the photo that displays at the top of the page in the banner. You can have the same image for the entire site, or customize a different image for each page. Please note that the size limit for the photo is 492x100 pixels. If you have trouble finding a photo or editing a photo to that size, please contact the diocesan Communications Office.

- Navigate to the Home Page.
- Click Edit Page at the top of the screen.
- Click on the Photo Header tab.
- Click Upload/Choose file.
- You can upload a new photo or choose one from the library of photos that you build as you upload new photos. To upload a new photo, click on Upload/Choose File, then click Upload New File.
- Use the Browse feature to locate the photo you'd like to use. Click Upload and Save.
- When you insert a photo on the homepage, it will carry over as the photo for all subsequent subpages.

Information about Subpages

- A subpage is any page that is not the home page. A sublink is a link to a pre-existing Web page – sublinks and subpages appear in your left-hand navigation menu. You can have practically unlimited subpages and sublinks.
- To create a subpage that's part of the main navigation menu, go to your home page and hover over the Add link at the top of the page. You can choose to add a subpage or a sublink to an outside website.
- You can also create a subpage of an existing subpage (for example, the subpages of your About page might include History of our Church, Beliefs and Practices).
- As you build and create subpages, Web Solutions creates a "breadcrumb trail," located above the header, that shows you where you've been and where you are.
- To delete a subpage, navigate to that page, hover over More and click Delete Page. Please note that if your subpage has subpages, you must delete those pages first. Otherwise, you'll receive an error message asking you to remove the child content from that page.

Information about Site Map

- Web Solutions will automatically build and edit your site map as you add and delete pages.
- To move the site map to the top right menu or the footer menu, click on Navigation Areas from the Control Panel. Click on Add Item for either the Ancillary (top left) or Footer menu, then select "site map" from the drop-down menu. Now, navigate to the Site Map page. Click Edit Link in the upper left-hand corner. Change the Move field to Site Root and click Save.

How to Edit Content on a Page

- On any individual page, click the Edit Page or Edit App button at the top of the screen. You'll want to assign the page the following information.
 - Page Name: This appears at the top of the browser window and in the left-hand navigation menu.
 - Header: An optional header can provide a more detailed description of the page's content.
 - Move: Choose where this page will fall in the navigation system. If it's the home page, the field should say "Site Root." Other pages can be listed under the home page or under added subpages.
 - Status: Choose whether or not you'd like the page to be visible to visitors.
- The white box on the screen is where you can type and insert text, photos and graphics. Here are a few tips and reminders regarding the editing icons.
 - You can type directly into the text field.
 - Use the dropdown paragraph menu to select different font sizes. Normal is paragraph text. Heading 2 and Heading 3 are a different style (size and color) and are typically used for headers that separate the different sections of the Web page.
 - You can copy and paste from a Word document or another Web page into the text field. Just keep in mind that you'll likely have to reformat whatever text you paste into the field. Microsoft Word, in particular, carries with it some formatting that does not translate well to the Web. To strip the formatting, copy the text, paste it into Notepad, and then copy again and paste the clean, unformatted text into the text box.
- To create a hyperlink, select the text you want to use as a link and click the icon that looks like a chain. Paste the complete URL or e-mail address into the Link URL field. If this is a link to an e-mail address, insert mailto: in front of the e-mail address (i.e. mailto:echerry@thediocese.net). To break the hyperlink, select the existing hyperlink and click the icon that looks like a broken chain. To edit the hyperlink, select the existing link and click on the chain icon.
- You can insert photos, files, flash and embedded YouTube videos into the editing screen.
- The Insert File icon (looks like a PDF icon) can be used for all file types (currently Word, PDF and Excel). File names should not contain spaces or characters. Create a new folder using the Create Folder button in the upper right hand corner, or navigate to the existing folder where you want this document to be stored. Folders are not required, but are available for organizational purposes. Click Upload in the top right corner. Click Choose Files. Browse around on your computer to locate the file you want to upload. After you select the file, click Upload to Server. Check the box next to the newly uploaded file and click the Insert button on the left side of the menu. You can sort the files based on name or date to locate them.
- When you insert a photo, it can be easier to do the formatting after you've inserted it. Once you've typed or pasted your text on the page, place your cursor near where you'd like the photo to appear, then click the Insert Image button. Create a new folder using the Create Folder button in the upper right hand corner, or navigate to

the existing folder where you want this photo to be stored. Folders are not required, but are available for organizational purposes. Click the Upload button in the upper right hand corner. An Upload screen will open. Click Choose Files and browse around your computer to locate the photo you want to upload. Remember that for photos should be resized before uploading - 800 pixels wide is the largest they should be. After you've selected the photo, click Upload to Server.

- Now that you've uploaded the photo, you can click on the thumbnail image to insert the photo into your editing page. Or, you can click on the arrow in the lower right-hand corner of each individual photo to Edit it. When you click Edit, you'll see options to crop, resize, flip or rotate the photo. Click the photo you've just uploaded as it appears in the gallery to insert it on the page. After inserted, select the photo to either resize it by dragging and dropping the handlebars on the corners, or to change its location in the Styles pull-down menu on the left-hand side of the editing screen, located under the Bold/Italics/Underline buttons. This will allow you to move the photo to the left or right while flowing the text in the opposite direction. Photo right moves the photo to the right and flows the text to the left. Photo Left does the opposite. Either way provides some space padding on the side of the photo so that text can flow smoothly. No space padding exists above or below the photo (as it is recommended that photos be aligned with the top of a paragraph).
- To embed a YouTube vide, first locate that particular video. Right click on that video and select “Copy URL.” Then go to the page in your platform where you want to embed the video and click Edit Page. Then click on the Insert/Edit Embedded Media tool (looks like a film strip). Select iframe from the Type dropdown menu and paste the URL into the File/URL field. Click Insert, then Save.
- The anchor icon can be used to insert a link to an item further down on a page. To insert the anchor, place your cursor where you want that anchor to be (at the bottom of the page, for example). Click on the Anchor and give it a name. Then select the text that you want to “jump” to that anchor and click on the hyperlink chain icon. Enter a hash tag followed by the name of the anchor (anchor names are case sensitive), i.e. #anchortname. Click insert.
- If you know HTML code, you can view the coding by clicking on the HTML link at the bottom of the editing screen.
- The icons on the top right hand row of the editing screen can be used to organize data into tables.

How to Create and Edit Tables

- To create and insert a table, click on the Insert Table button, in the top row. Use the window that opens to set the number of rows and columns in the table.
- To insert a row or column, put your cursor in an existing row or column and click the button for Insert Row Above, Insert Row Below, Insert Column Left or Insert Column Right (located in the toolbar). To delete a row or column, place your cursor in that row or column (but do not select the whole row or column) and select Delete Row or Delete Column.
- To delete the Table, right click on the Table and select Delete Table.

Module Management

How to Use the News Module

- From the Control Panel, click on News. Click Edit App at the top of the screen to manage the settings for this page (i.e. where it appears on the navigation menu, what the introduction paragraph of the page says). The Settings tab allows you to insert an Intro Paragraph and to change the name of the page as it appears on the home page news feed, using the HP Title field.
- Each news item must be associated with a news category.
- Hover on Add on the gray management toolbar at the top of the screen and select News Category to create a category. (Examples include Press Releases, Parish Newsletter.)
- Once you've created a category, click on that category to add a news item. Hover over Add on the gray management toolbar at the top of the screen and select News Article (a press release from your church, for example), News Link (an article on TimesDispatch.com) or News File (a PDF or Word file that contains your news item).
- When you're creating a news item, you'll want to add a title and the date when the item appears on the calendar (usually today's date). Click the Featured box to display the item on the home page news feed.

How to Use the Events Module

- From the Control Panel, click on Events. Click Edit App at the top of the screen to manage the settings for this page (i.e. where it appears on the navigation menu, what the introduction paragraph of the page says). The Settings tab allows you to insert an Intro Paragraph and to change the name of the page as it appears on the home page events feed, using the HP Title field.
- Each event must be associated with an event category.
- Hover on Add on the gray management toolbar at the top of the screen and select Event Category to create a category. Past and Upcoming Events are not categories but ways that events are organized within the Web Solutions system. (Category examples include Outreach Opportunities or Worship Times.)
- Once you've created a category, click on that category to add an event. Hover over Add at the top of the screen and select Add Event.
- When you're creating an event, you'll want to create an event title; beginning and ending dates (can be the same date); and beginning and ending times. Choose to make the event Visible to make it "live" and choose to make the event Featured to include it on the home page. Add the event location if you'd like users to be able to click on a link for Google directions to the event. Click Show Details if you're typing more detailed information (keynote speaker bio, link to registration form, etc.) in the text box at the bottom of the page.
- Please note that the system sorts events and displays them by date. It can not, however, sort dates by time, since that is an optional field. If you're entering events on the same date, try to enter them in chronological order. Otherwise, you might have to delete and recreate events to ensure that they're listed in chronological order.

- You can create a recurring event using the Recurring tab at the top of the event screen. First, create the first event in the series in the General Information tab. Then, click the Recurring tab. Check the Create Recurring Event box, and decide how long you'd like the event to recur. Check the boxes to indicate if it's a weekly or monthly event. If it's a weekly event, pay special attention to the buttons that correspond to the days of the week – they're poorly placed.

How to Use the Contact Form Module

- From your Control Panel, click on Contact Form.
- Click on Edit App in the gray management toolbar at the top of the screen. Edit the site name and location in the General Information Screen.
- Click on Settings to create the content of the form. You can dictate where the form will be e-mailed; an introduction paragraph; checkboxes that users can mark for their interests; and the text of a thank-you page.
- Using the More link at the top of the screen, you can see an archive of all the submissions you've received using the Contact Form.

How to Use the Driving Directions Module

- From your Control Panel, click on Driving Directions.
- Click on Edit App at the top of the screen to edit the site name and navigation location. You can also use the Settings tab to create an introduction paragraph, which you might use to describe the parking situation for your church, or a road marker to help visitors locate your church.
- Click Add Location in the gray management toolbar at the top of the screen to enter an address for your church. Enter your church or organization's name and physical address. This will enable the user to get turn-by-turn driving directions to your location.
- The Driving Directions App also allows you to view submittals to see who's trying to navigate to your locations. To view driving directions submittals, select "More" on the gray toolbar, and then click "View Submittals." The starting address entered into the map will be displayed, along with which of your locations that user wanted directions to, and the date they accessed the directions. You can "Delete" submittals using the button to the right of each listing.

How to Use the Callout Feature

The Callout enables you to upload up to three small icons to the navigation bar of your site that link with whatever social media utilities you use.

- Pick or design what type of buttons you would like to be featured on the page. Remember, you can insert up to three buttons. They'll appear in the space directly below your church contact info in the left-hand navigation menu. Samples of Facebook and Twitter icons are available by contacting the diocesan Communications Office. If you're using a button for another social utility, you'll want to resize it to 24 pixels wide by 24 pixels high.
- Log-in to your Web Solutions account.

- Click Callouts on the Control Panel.
- Click Add Callout in the upper left-hand corner.
- Give the Callout a Title - this will be the text that is displayed when a visitor hovers over that button. Example: Visit Us on Facebook.
- Insert the URL link that you want this button to be associated with. Example: <http://www.facebook.com/EpiscopalDioceseofVirginia>.
- Set the Link Target, which is how you want this particular to open in your visitors' browser windows. Since they're leaving your site to go to this page, I recommend setting the Target to New Window.
- In the Alt Text field, I've just been entering what type of Callout this is, i.e. Facebook Callout.
- Click Upload/Choose File for an upload window to open. Click Upload New File, then click Browse to browse around on your computer and locate the image file. Once selected, hit the Upload Button. Then select the button corresponding to the now-uploaded image. Click Save in the upper right-hand corner.
- Leave the SWF Height field blank.
- If you only want this to be visible certain dates, fill out the Show date fields for when you want it to start and stop appearing.
- Set Status to Show to Visitors.
- Click Save in the upper right-hand corner.

How to Use the Password Protected Module

The module consists of two parts: a File Repository and a Directory. These are both filed under a “Login Area” on your website. The landing page of the Login Area is the File Repository. The Directory is also accessible from this page. Both the File Repository and the Directory are also accessible via the Control Panel. Keep in mind that you’ll have to situate the Login Area page within the navigation system of your website by going to the Login Area page (yoursitename.com/)

Your members will need usernames and passwords to access the Password Protected Module. For most churches, it will be the job of the parish administrator or the web administrator (or whoever you designate) to create the usernames and passwords. You can take two approaches to this: have one username and password per household, OR assign usernames by group/access type. For example, vestry and other leaders might have the username “Leader” with the same password, while all other parishioners might have the username “Parishioner” with the same password. Each individual church will have to respond to any username/password inquiries.

The File Repository is a secure area of the website where you can upload material or resource files. Members can login and access all or select groups of these files.

The Directory is a searchable database of your members. You will need to export your member list – either individuals or households – through an Excel spreadsheet. You can also add individual entries. Keep in mind that, because we’re operating on the assumption that

your original database contains the most up-to-date information, each time you upload a spreadsheet to the Web Solutions Directory, it completely overwrites all existing entries.

Please keep in mind that the Password Protected Module is NOT Fort Knox. We do not recommend storing social security numbers, credit card information or any type of highly sensitive and confidential information in this module. Instead, the module is intended to add an extra level of protection to information that you prefer be only accessed by your congregation.

File Repository

The Members Only File Repository is a secure area of the website to which materials and resource files can be uploaded and categorized. Members, for whom you can create individual accounts, can login and access all or select groups of these files.

The Members Only File Repository can be **managed** by any admin user of the website. Management updates to this module may include:

- ▶ Adding, editing or deleting a folder
- ▶ Re-organizing the folder structure
- ▶ Uploading or deleting a file
- ▶ Creating login credentials for a new member
- ▶ Changing a member's login password

Begin by navigating to the management section of the website and logging in. On the “Main Management” screen, scroll down until you find “File Repository” on the list of Installed Apps. Clicking this link will allow you to view the admin page of the Members Only File Repository, which contains a list of all files currently added.

By selecting “Edit App” in the gray management toolbar at the top of the screen, admin users can edit several features of the Members Only File Repository that are visible to front-end users.

- ▶ On the “General Information” tab, you can change the name of the page.
- ▶ On the “Settings” tab, you can change the “intro paragraph” – the text that users will see above the user name and password fields and prompts them to log in.
- ▶ On the “Settings” tab, you can also change the “Welcome Text” – the text that users will see after logging in. This should provide a brief overview of the Login Area and instructions for using it. You must scroll down to view this option.

Managing Files

To upload a new file, click “Add...” on the gray toolbar

Add File Cancel Save

** denotes required fields. File Size Limit: 10 megabytes*

File to upload: * Choose File No file chosen

Folder: Training Documents

Status: Show to Visitors

Title: * Product XYZ Fact Sheet

User Type: Sales Reps

Brief

This document will provide an overview of our latest product...

and then select “File.” In the pop-up window, fill out the following fields:

File to upload: Click the “Choose File” button to find a file located on your computer, and select “Open” when you have located the desired file.

Folder: Use the dropdown menu to choose which folder, if any, you want to place this file in.

Status: Decide whether to show this file or keep it hidden.

Title: Provide a title for the file. The title should provide a clear (but brief) explanation of what the document is so that members know what to look for.

User Type: Define which type(s) of users can access this file (see page 4 for more on user types).

Brief: This field is optional but allows you to provide a description or summary of the file.

To edit any of the above information, or to delete the file, find the document in the list on the admin page and use the “Edit” or “Delete” link as appropriate.

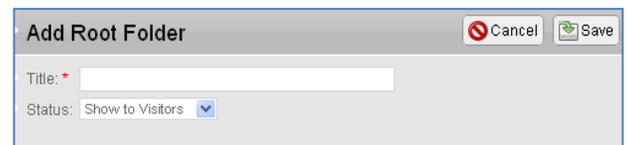
To sort the order of files, navigate to the appropriate folder on the admin page and click “Sort Files” next to it. In the pop-up window, drag and drop the files into your preferred order and then click “Save.”

Managing Folders

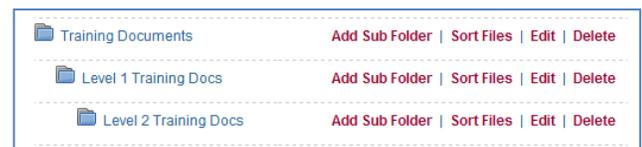
Files may be organized into folders and sub-folders. Top-level folders are referred to as “root folders.” (Note that folders are optional – if you do not create any folders, all files will display in a single list.)

To add a folder, select “Add” on the management toolbar, and then click “Root Folder.”

You must add a title to the root folder, and choose whether to make this folder visible to your site visitors, or keep it hidden. Select “Save” to keep your changes.



To add sub-folders, navigate back to the main admin page for the Members Only File Repository, where all folders, sub-folders and files that you have added so far will display. Click “Add Sub Folder” to add another folder below any existing one. (Note that additional folders can be added below sub-folders as well – there is no limit to how many levels deep the folder structure can go.)



Training Documents	Add Sub Folder	Sort Files	Edit	Delete
Level 1 Training Docs	Add Sub Folder	Sort Files	Edit	Delete
Level 2 Training Docs	Add Sub Folder	Sort Files	Edit	Delete

To change a folder’s name or to delete it, find it in the list on the admin page and use the “Edit” or “Delete” link as appropriate. Note that if you delete a folder, any sub-folders and files within it will also be deleted.

To sort the order of root folders, select “More...” from the gray management toolbar and then click “Sort Root Folders.” In the pop-up window, drag and drop the root folders into your preferred order and then click “Save.”

Managing User Accounts

User accounts which provide access to the Members Only File Repository can *only* be created by an admin user; site users cannot create their own accounts. An admin user must create the new account and then provide the user with their login credentials.

To manage user accounts, select “More...” on the gray management toolbar and then click “Manage Users.” A list of all current accounts will display, with the user name, password and number of logins to date for each. On this page you can:

- ▶ **Create a new account.**

Select “Add...” on the gray management toolbar and then click “User.” In the pop-up window, create a user name and password. You can also



select a user type (see below) and choose to enable or disable the account.

- ▶ **Edit or delete an existing account.** Use the “Edit” and “Delete” links next to each user on the list and then make changes as necessary. Note that if a member goes on a temporary hiatus, you do *not* have to delete their account and then recreate it when they return – just set the account status to “Disabled” while they are on leave.

Managing User Types

The “user types” functionality allows you to create categories of users. You could then associate files with only a specific user type as necessary. Note this applies only to files – so *all* users, regardless of type, will see *all* folders you create.

By default, all accounts will be categorized into the one existing user type. To manage user types, select “More...” on the gray management toolbar and then click “Manage User Types.” A list of all current user types will display, along with the number of users in each category. On this page you can:

- ▶ **Create a new user type.** Select “Add...” on the gray management toolbar and then click “User Type.” In the pop-up window, provide a name for the new category you want to add.
- ▶ **Edit or delete existing user types.** Use the “Edit” and “Delete” links next to each user on the list and then make changes as necessary. Note that you cannot delete a user type while it still has accounts associated with it – you must move or delete those accounts first.

Managing the Member Directory: Overview

The Member Directory can be edited manually through the CMS options and by uploading an excel file.

To get started, Log-in to Management and click on the “Directory” link under installed Apps.

NOTE:

If you upload an excel file, they will overwrite manual additions/edits:

If you add/edit directory entries manually and plan to upload an excel file you will need to make the same additions/edit in the excel file so that they are not overwritten the next time you upload the excel file.

To upload an excel file:

1. Ensure your .xls or .xlsx file follows this format exactly. Do not name the individual worksheet page of your spreadsheet – it should be called Sheet1. The columns should be as follows:
Title, Last Name, First Name, SpousePartner First Name, SpousePartner Last Name, Childrens First Names, Address1, Address2, City, State, Zip code, Home Phone, Work Phone, Cell Phone, Home Email, Work Email, Birthday, Notes
2. Click on “More > Import Entries” on the admin tool bar
3. Choose the file and click upload

To add/edit individual entries manually:

1. To add a new entry, click on “Add > Entry” on the admin tool bar. Fill out your entry and click save.
2. To edit an existing entry, click on “More>Manage Directory” on the admin tool bar. On this screen you can edit/delete individual entries.