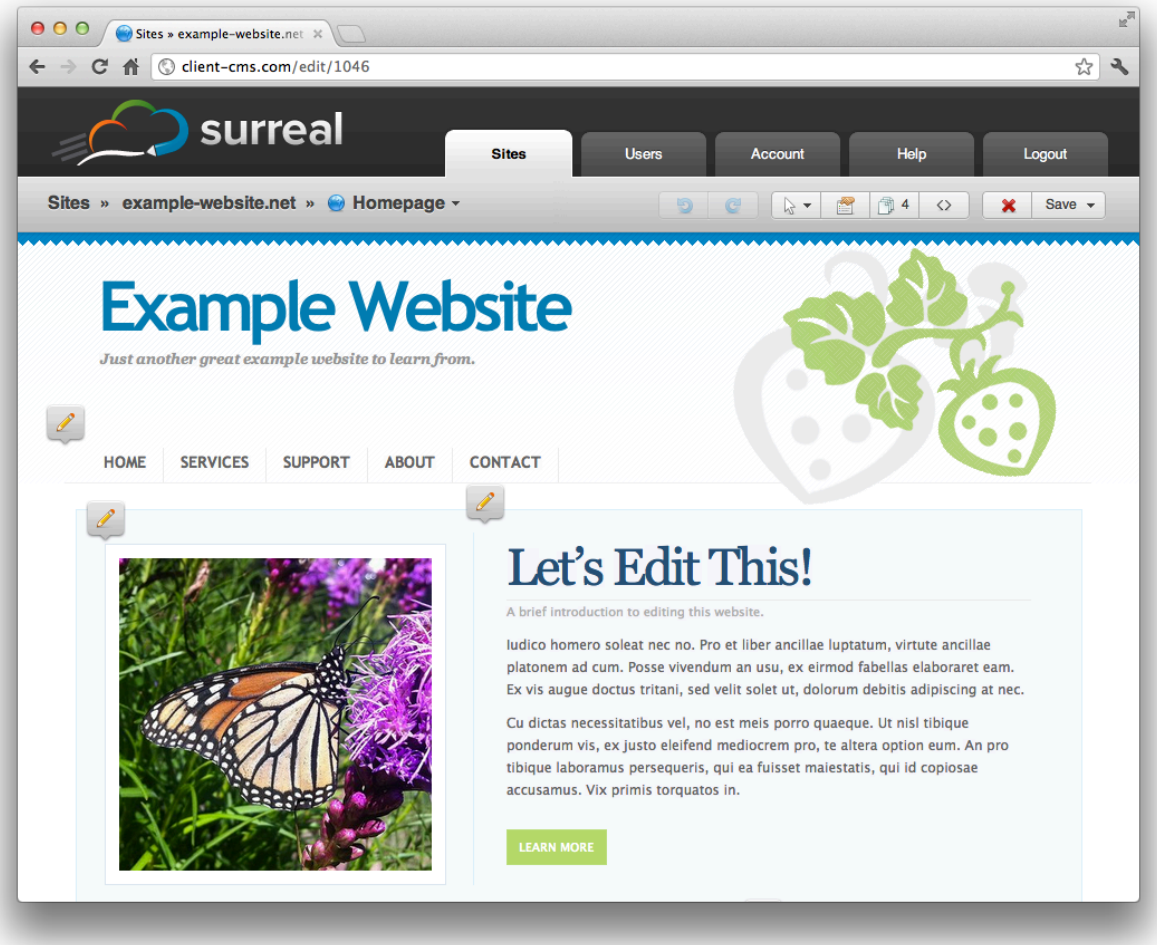
# How to Edit Your Website

A guide to using your Content Management System

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# Overview

This manual will help you edit your website using the **Content Management System.** A content management system, or CMS (pronounced C-M-S), is any software that gives you the ability to update content on your website.

# Accessing the CMS

To access the CMS, you will need a web browser and an Internet connection. All modern browsers are supported, including:

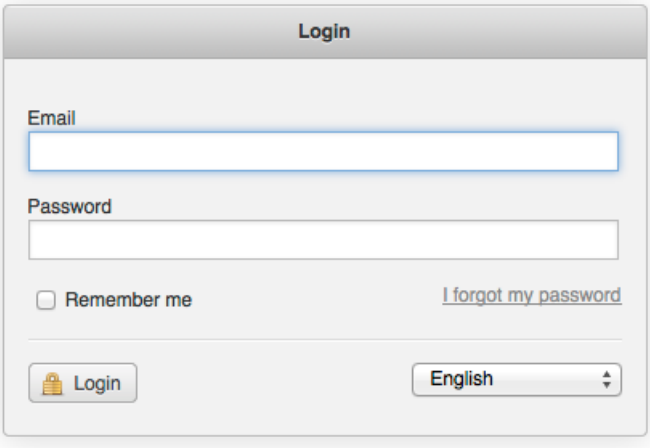
- Internet Explorer 7+ (recommended version: 9)
- Firefox
- Google Chrome
- Safari
- Opera

*If you are using Internet Explorer 7 or 8, it is highly recommended to install Chrome Frame when prompted, as this will ensure you have access to all possible features. In addition, you will notice significant visual enhancements and performance increases.*

To access the CMS, navigate to the following URL in your browser:

## http://client-cms.com/

You should see the following login form:



## Logging In

To login, use your *email address* and *password*. You may have received a password via email already. If not, contact your designer.

## Setting Your Language Preference

You can set your language preference from the login screen and also from the **Account** section. Your language preference will be saved in a *cookie* on your computer, so if you use another computer or clear your cookies you will need to set it again.

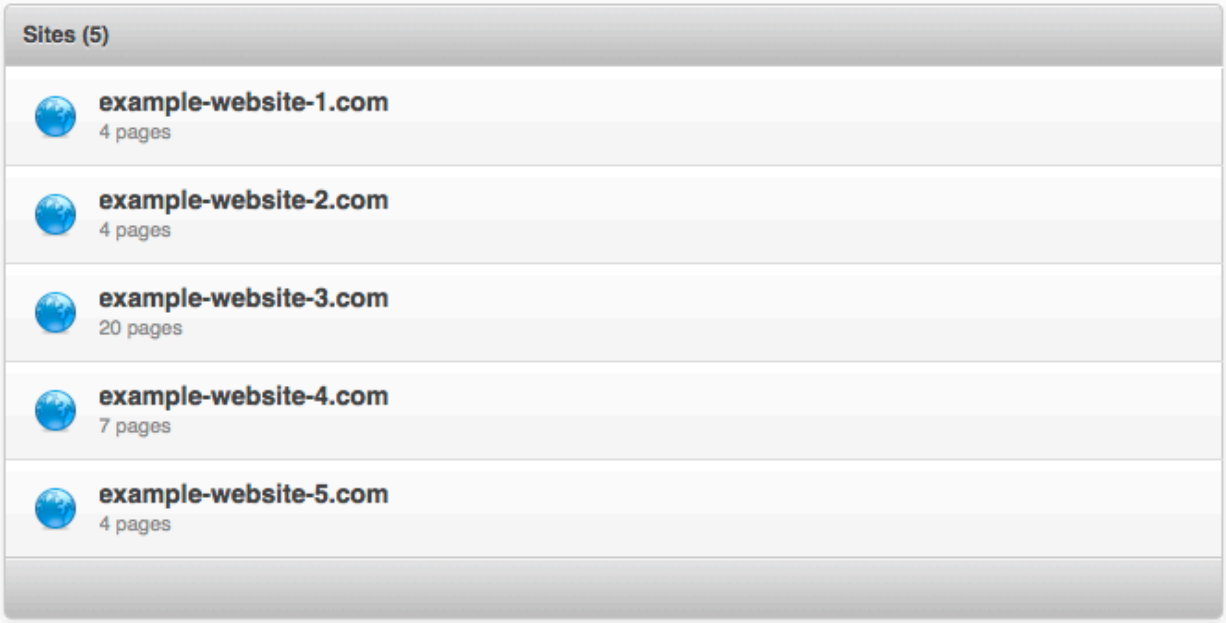
## Resetting Your Password

If you forget your password, you can reset it by selecting *I forgot my password*. Simply enter your email address and the CAPTCHA code and a new password will be sent to you. If you don't see the email within a few minutes, please check your spam folder.

# Sites

## Selecting a Site

The CMS is capable of managing multiple websites, so if you have access to more than one you will see a list of them when you login. At any time, you can select the **Sites** tab to come back to this list. (If you only have one site, you will be taken directly to that site instead.)



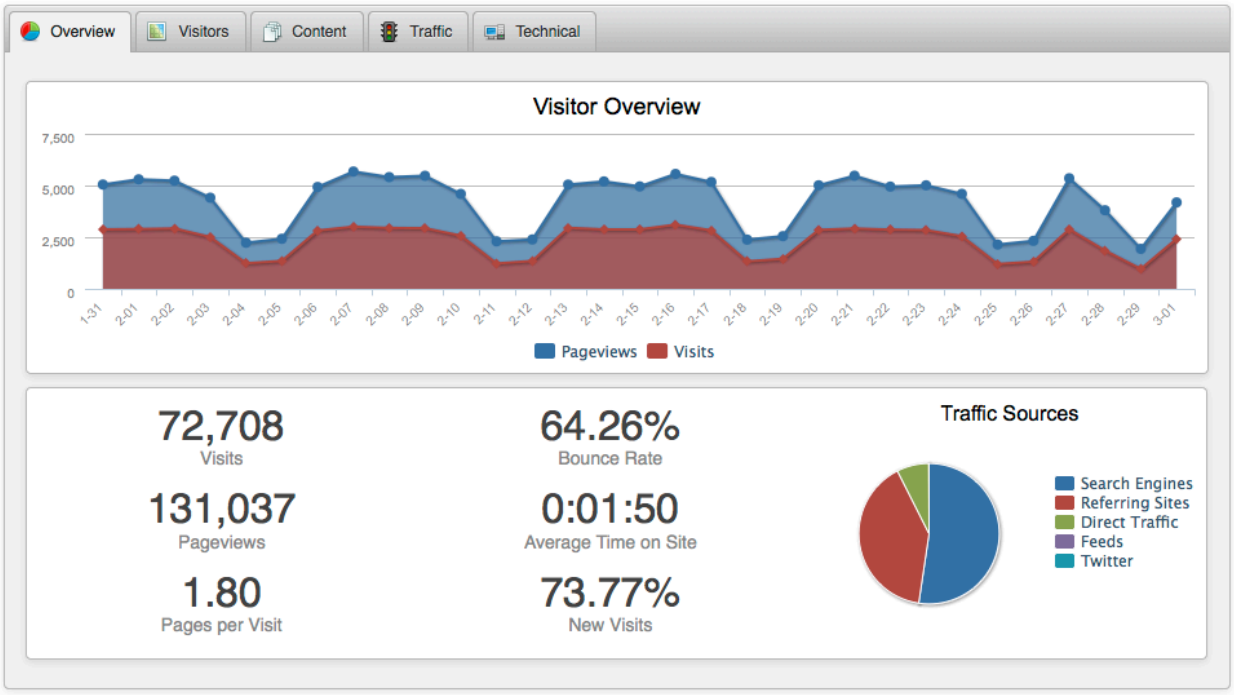
Simply click on the site that you want to edit to see a list of pages.

## The Google Analytics Dashboard

The Google Analytics Dashboard is an optional feature that may be enabled for one or more of your sites. When enabled, you can see important visitor information about your site including pageviews, geographical data, top content, and more.

To access the analytics dashboard, look for the **View Site Analytics** option from the sidebar of your site. If you don't see this option, contact your designer to see if it can be enabled.

Here is an example of what the analytics dashboard looks like:




There are many reports available through the analytics dashboard:

- **Overview**
- **Visitors**
  - *Continent* – shows traffic by continent
  - *Country* – shows traffic by country
  - *City* – shows traffic by city
  - *Language* – shows what languages your visitors use
  - *Length of Visit* – shows how long visitors stay on your site
  - *Depth of Visit* – shows how many pages visitors access while on your site
- **Content**
  - *Top Content by Path* – shows the path of the most popular pages on your site
  - *Top Content by Title* – shows the title of the most popular pages on your site

- *Top Landing Pages* – shows which pages users come to first on your site
- *Top Exit Pages* – shows which pages users leave your site from
- *Second Page Visited* – shows the second page that visitors go to on your site

- **Traffic**
  - *Keyword* – shows which keywords visitors used to find your site
  - *Traffic Sources* – shows where the traffic to your site comes from
  - *Referring URLs* – shows where visitors were immediately before your site
- **Technical**
  - *Browser* – shows which browsers your visitors use
  - *Browser Version* – same as *Browser*, but organized by version
  - *Operating System* – shows which operating systems your visitors use
  - *Operating System Version* – same as *Operating System*, but organized by version
  - *Screen Color* – shows the color depth of visitors' devices
  - *Screen Resolution* – shows the screen size of visitors' devices

# Pages

## Selecting a Page

This section shows all the pages on your site that you can edit. Depending on your account privileges, the options you see in the CMS may differ from those shown below.

To select a page to edit, simply click on it. This will take you to the **Live Editor**, described in the next section.

## Labeling Pages

Page labels are used to identify pages inside the CMS. To change a page label, select the **Relabel** button. You will be prompted to enter a new label for the page. Remember that labels are only used *inside* of the CMS, and have no effect on the live page.

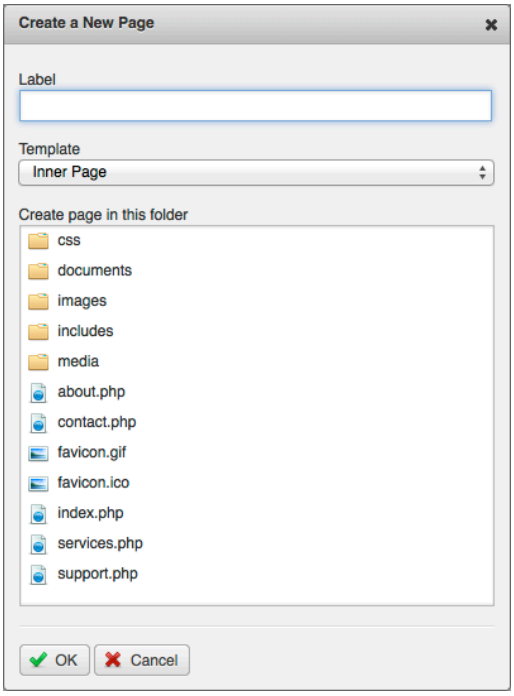
## Creating Pages

If your designer has enabled this feature, you can create pages using templates. To create a new page, select **Create a New Page** from the sidebar.

Enter a label and select the appropriate template from the resulting dialog. If necessary, select a folder in which to create the new page.

*When creating pages, please select brief and descriptive labels. The label you select will be converted to a web-safe filename. For example, the label* About Us *will become* about-us.html.

*Please be attentive when creating pages and make certain to place them in the most appropriate folders to keep your site organized.*




## Duplicating Pages

If your designer has enabled this feature, you can duplicate existing pages to create new ones.

To duplicate a page, select the **Duplicate** button. You will be prompted to enter a page label for the new page. This label will be converted to a web-safe filename and assigned to the page that was created.

## Deleting Pages

If your designer has enabled this feature, you can delete pages from your site. This action is permanent and cannot be undone, so be very careful and make sure that you really want to delete a page for good before doing so.

To delete a page, select the **Delete** button. You will be prompted to confirm your action before the page is deleted.

## Moving Pages

If your designer has enabled this feature, you can move pages from one folder to another. To move a page, select the **Move** button.

Navigate to the folder that you want to page to be moved to and select **OK**.

*Be very careful when moving pages, as this will cause their URLs to change and may break any links that have been made to them. You may wish to consult your designer before using this feature.*

# Editing

## The Live Editor

Once you've selected a page to edit, you will be taken to the **Live Editor**. The Live Editor is a non-functional version of your page that will show you what your page will look like once it is published. By design, you will not be able to interact with your page in the Live Editor. That is, you will not be able to follow links, click buttons, etc.

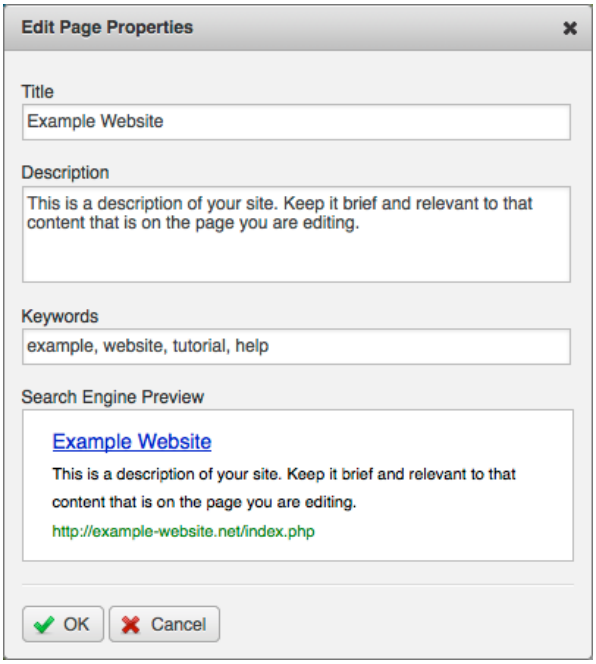
Here is what the Live Editor looks like with an example site:

## Selecting a Content Region

Editable content regions are indicated by an edit bubble in the Live Editor. It is normal for some sections of your page to not be editable. Please contact your designer for any changes that cannot be made using the Live Editor.

As you hover over a content region, the Live Editor will focus on that area to highlight the region. To edit the region, simply click on it. If a region is hidden, you can select it using the **Region Selection** button in the toolbar.

## Page Properties




Page properties include the **title**, **description**, and **keywords** that are used to tell search engines about each page. If your designer has enabled this feature, you can change these values for each of your pages by selecting the **Edit Page Properties** button.

Each *title* should be brief and descriptive to attract potential visitors to your page.

*Descriptions* are used by most search engines to give potential visitors more information once you have their attention. Keep them short and relevant, as you are limited to a varying number of characters depending on each search engine.

*Keywords* should be a list of comma-separated words and phrases that relate to the content of your page. You may add as many keywords as you like, but three to five are usually sufficient.

## Revisions & Drafts

Every time a page is published, a **revision** is created so you can review or revert your changes if the need arises. All revisions are stored for a maximum of 180 days.

You can save your work and finish editing at a later time using **drafts**. To save a draft, select the **Save** button and choose **Save Draft** from the menu. A draft is essentially a revision that has not been published.

To recall a draft or a revision, select the **View Revisions** button and look for your draft or revision in the resulting list. When you click **OK**, the revision will be displayed in the Live Editor. It will *not* be published until you select **Publish**.

## Publishing

When you are done editing, you can publish your changes to the web by selecting the **Save** button

button and choosing **Publish**. Your changes will be published immediately, so make sure you are truly ready to publish before doing so.

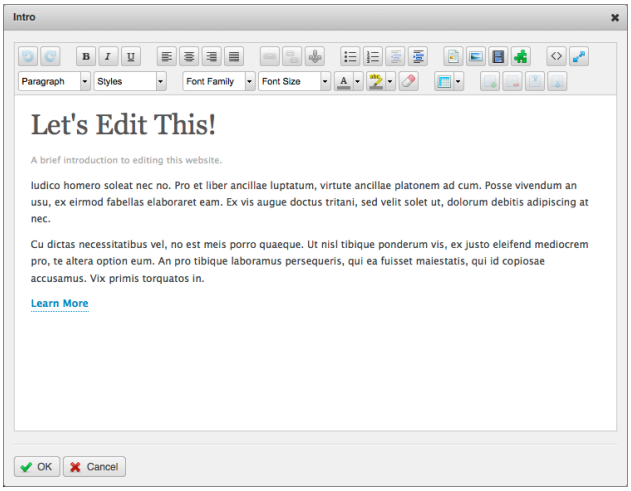
### Scheduled Publishing

You can tell the CMS to automatically publish your changes at a specific time in the future. To do this, select the **Save** button

and choose **Publish at a certain time**. You can schedule a date and time up to one month from the current date.

If the CMS is unable to publish your changes when the time comes (i.e. the server is down or unavailable at the time), you will be notified by email. If this happens, you can open the revision to retrieve your changes and reschedule it or publish it manually.

## The Rich-text Editor




The **Rich-text Editor** appears when you select certain types of content regions. You will spend most of your time using this tool. The following is an example of the rich-text editor showing *all options*. Your version of the editor may look different depending on the features your designer has enabled.

Working with the rich-text editor is very similar to working with popular word processing applications. The following sections will cover many of the most common features you will use.

### Undo & Redo

The **Undo** and **Redo** buttons let you step through your changes while editing. You can also use **CTRL+Z** to undo and **CTRL+Y** to redo if you prefer to use the keyboard. (Mac users should replace **CTRL** with **CMD**.)

### Text Formatting

As in many popular word processing applications, you can change the format of text by selecting one or more characters and clicking on the appropriate formatting option. For example, if you want to make something **bold** or *italic*, highlight the appropriate text and select the **Bold**

or **Italic**

button. You can also underline text, select a different font, specify the size of the font, and add a foreground and background color using the toolbar.

*Most users expect underlined text on your pages to be links. While this option may be available to you, it is generally not recommended to use in most situations, as it may confuse users.*

## Text Alignment

You can justify your text in four different ways: **Align Left**, **Align Center**, **Align Right**, and **Align Full**. Simply highlight the paragraph(s) you want to align and select the appropriate button from the toolbar.

## Structuring Your Content

The **Format** dropdown lets you structure your content using *headings*, *paragraphs*, and other types of block-level elements. These elements help keep your page organized, so make sure you use *headings* instead of just highlighting a line of text, changing its size, and making it bold. This will also keep the design of your pages consistent with the rest of the site.

At the same time, if you make something a *heading*, it should make sense structurally. If you're goal is to make the selection bigger and bolder but the result doesn't add structural value to your page, it is probably not an appropriate use of a *heading*.

## Custom Styles

Your designer may provide you with custom styles to use in your pages. If these styles are available, you will find them under the **Styles** dropdown.

These styles will vary in both name and appearance, depending on how your designer has configured them. If they are available, you can apply them by highlighting the appropriate content, selecting the **Styles** dropdown, and selecting the style you want. Only one style may be applied at a time.

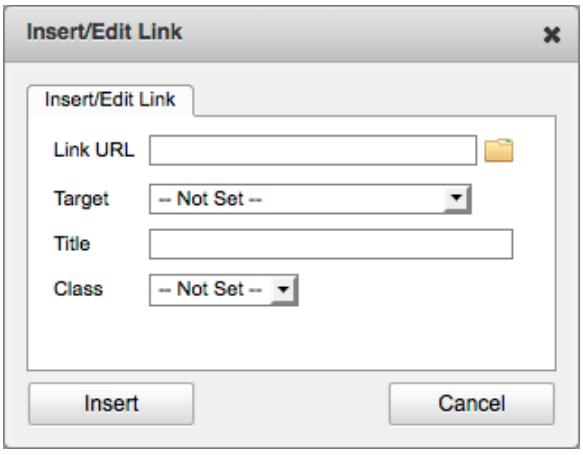
You can remove a style by selecting it again from the **Styles** dropdown.

## Links

To create a link to one of your pages—or to another website—highlight the appropriate text and select the **Link** button. The **Insert/Edit Link** dialog will appear.

You can either type in a URL to another website or use the **Browse** button to select a page from your site.

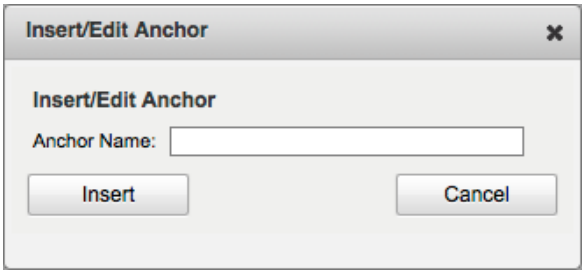
*To link to an email address, use the following format:*
**mailto:user@domain.com**




You can use the **Target** dropdown to specify whether or not the link should be opened in a new window. If you want a tooltip to appear when someone hovers over the link, enter it into the **Title** field. Finally, the **Class** field is used to apply a custom style, as mentioned in the previous section.

To remove a link, highlight it and select the **Unlink** button.

## Anchors




Anchors let you deep link to a specific section of your page. To create an anchor, place the cursor in front of the heading that you want to link to and select the **Anchor** button. The **Insert/Edit Anchor** dialog will appear.

You will need to select a name for your anchor, and it must follow these rules:

- Names must begin with a letter
- Names must contain only A-Z, 0-9, dashes, and underscores
- Names cannot contain spaces or other symbols

A good example of an anchor for a photo gallery would be **photo-gallery**.

*When linking to anchors in your page, you will need to prefix the anchor name with a pound symbol. For example, to link to the **photo-gallery** anchor, your link should look like:* page.html#photo-gallery

## Lists & Indenting

You can create lists in the rich-text editor by selecting the **Bulleted List** button or the **Numbered List** button. To create a new list, place the cursor in an empty paragraph and select the appropriate button. To turn one or more paragraphs into a list, highlight them and the select the appropriate button.

To change the level of a list item, use the **Indent** and **Outdent** buttons.

## Tables

You can edit tables in the rich-text editor very easily. To change the content of a cell, simply select it and edit it like any other part of the page. For more complex table editing, use the **Table** button. The left side of the button will insert or edit a table, while the right side of the button shows options for working with rows, columns, and cells.

## Repeatable Regions

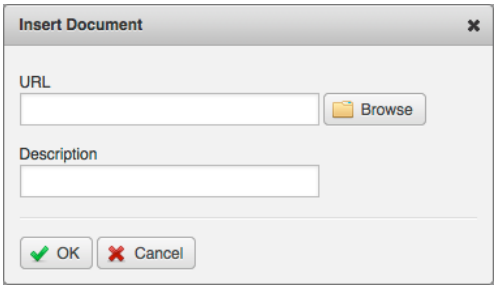
Your designer may configure **Repeatable Regions** on one or more of your pages. These are useful for many things, but essentially they allow you to add, remove, and reorder structured sections of your page very easily.

When your cursor is inside of a repeatable region, the repeatable region buttons become available. You can usually tell a repeatable region by the dashed borders they have that turn solid when you select them. To add a new region, select an existing region and click the **Add Region** button. To delete one, select the **Delete Region** button. You can also move regions up and down to reorder them.

Here are some keyboard shortcuts that you can use while working with repeatable regions:

- *Add Region* – **ALT++**
- *Delete Region* – **ALT+-**
- *Move Region Up* – **ALT+UP**
- *Move Region Down* – **ALT+DOWN**

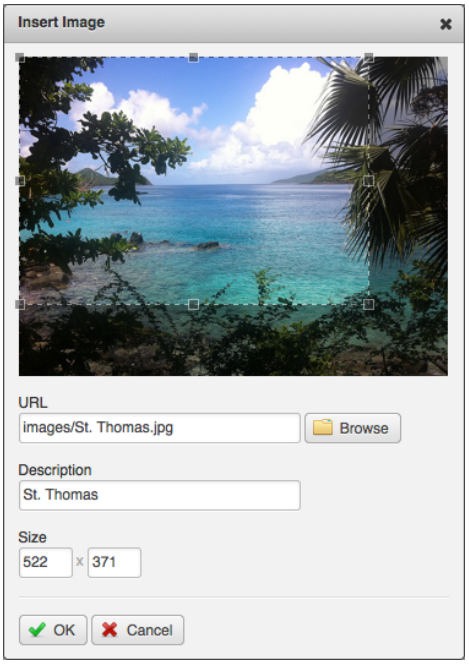
## Documents




To insert a document into your page, place the cursor where you would like a link to the document to go and select the **Insert Document** button.

You can enter a URL manually or use the **Browse** button to upload and select a document from your site.

## Images




To insert an image into your page, place the cursor where you would like the image to appear and select the **Insert Image** button. The *Insert Image* dialog will appear.

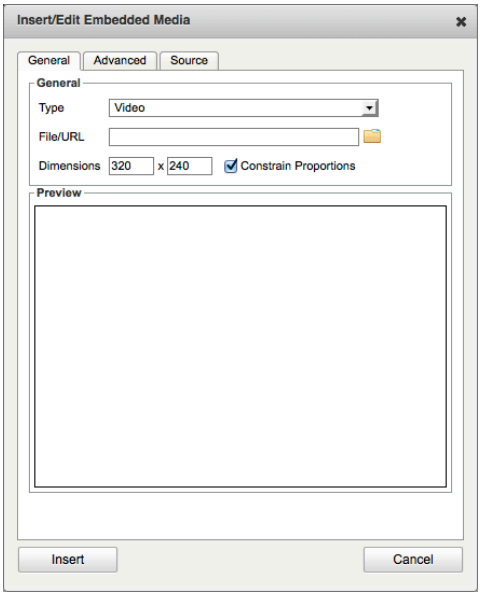
To select an image, enter a URL into the **URL** field or choose an image from your site using the **Browse** button.

Providing a description is recommended, as this will aide users who have images disabled, users with text-based browsers, and users with disabilities that prevent them from seeing images.

If desired, you can crop the image by clicking and dragging a selection over it with your mouse. When an image is cropped, the original file is left intact and a new one is created. The original image file will never be modified, so you can undo your changes at any time.

To resize an image, enter the desired width and height in the **Size** fields. These values are constrained based on the image's aspect ratio to avoid distortion. When you change the size of an image, a new file will be created with the scaled version of the image. This ensures that the image will load quickly when the page is viewed. Like with cropping, the original image file is never modified, so you can undo your changes at any time.

### Media




To insert a video or other media into your page, place the cursor where you would like the media object to appear and select the **Insert Media** button.

This dialog is more complex than prior ones, but that's because there are many options when working with media files. If you're not sure about something, contact your web designer for help.

The minimum requirements for embedding media are the **Type** and the **File/URL** fields. You can enter a URL manually or use the **Browse** button to upload and select a media file from your site.

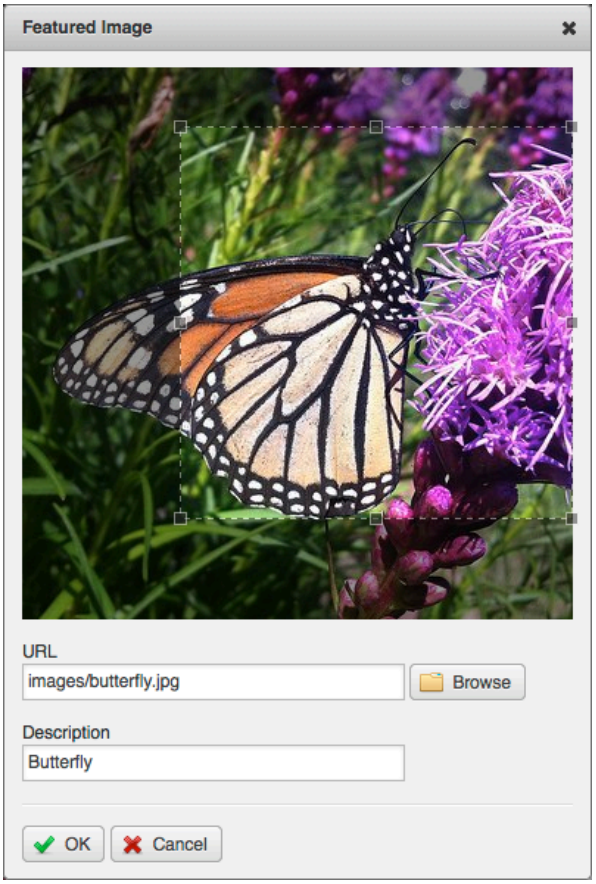
If necessary, you can set the **Dimensions** and adjust more settings in the **Advanced** section.

### HTML Snippets

If your designer has enabled this feature, you can embed snippets of HTML from other sites into your pages. Examples of this include snippets from Google Maps, YouTube, or any other site that provides embeddable HTML code for sharing content.

To embed content like this into your page, select the **Insert HTML Snippet** button. Simply copy and paste the HTML code into the resulting dialog and select **OK**.

## The Image Editor




If your designer has made one or more images editable, selecting them will bring up the **Image Editor**. You can use the image editor to safely swap out images and crop them without affecting the layout of your page.

To choose a new image, select the **Browse** button and upload or select an existing file from your site.

Use your mouse to click and drag a selection over the image to crop it. Note that, when an image is cropped, a new file is created and the original file is left intact so you can undo your changes at any time.

## The Full Source Editor

*This is an advanced feature that most users will not have or require access to. If you are not familiar with HTML, CSS, JavaScript, and server-side scripting languages you should probably avoid this feature to prevent damaging your pages.*

To access the **Full Source Editor**, select the **Full Source** button. You can make changes to any part of the source code using this feature, so be extremely cautious unless you know exactly what you are doing. Most users should avoid this feature, even if it's available.

Keep in mind that revisions are not created when pages are modified using the Full Source Editor, so it's important to keep a local backup of your pages if you plan on using this feature.

# Account

You can manage your account settings—including your name, email, password, and language settings—by selecting the **Account** tab.

# Help

The Help & Support section is designed to expedite help requests to your designer. When submitting a help request, please select the appropriate reason for the request and the affected site. Remember to provide as much information as possible to help troubleshoot the problem. If necessary, include details such as your operating system, browser version, and any steps they should take to experience the problem.

In most cases, your designer will respond to you via email. Feel free to write them back by replying directly from your email client.