



**Web publishing with the Boxharry
'Control' Web Manager**

Guidance notes v.002

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Contents:

1. Introduction.....	4
2. Overview of Control Web Manager	4
3. How web pages are set up	5
4. The page structure	6
The key reference items and navigational aids on the page	6
5. Logging into Control to edit your website	7
6. A guide to the standard website structure (pages/directories).....	9
Essential folders:.....	9
7. How to create a new web page	12
Important note about file names	12
8. The two types of web page.....	13
Standard web page	13
Widget-driven web page	14
9. The 'Preview' tab (and accessing an existing web page)	16
Very important note about deleting items	17
10. The 'Content' tab.....	18
For a standard web page (or to edit the contents of a widget in the 'Widgets' hot key):	18
A guide to the 'Content' tab toolbar icons	19
11. Important note about copying and pasting	20
Pasting (for PC users):.....	20
Pasting (for Mac users):.....	20
Use the 'Paste from Word' icon	20
12. Inserting or editing a hyperlink	21
About hyperlinks.....	21
Best practice for creating hyperlinks	21
Creating an internal hyperlink - pages	22
Creating an internal hyperlink - documents	24
Creating an external hyperlink	25
13. Working with images	27
Guidance for image format, size and resolution	27
Uploading images to the Web Manager	27
Placing an image on a page (or in a widget)	28
14. Working with Widgets in the 'Content' tab.....	29
Editing a widget used in the central column	29
Removing a widget from the central column.....	29

Adding a widget to the central column.....	30
15. Pages containing forms and other advanced functionality	34
Forms.....	34
News articles, store items and other advanced features	35
16. Publishing PDFs on your web page	35
Guidance for creating PDFs for the web.....	35
17. Proper naming conventions (using the correct filenames)	36
18. The 'Properties' tab	37
19. The 'Columns' tab	39
Adding a widget to the menu and/or feature columns of a page	39
20. The 'Widgets' hot key.....	42
Built-in widgets.....	42
Creating a new widget	42
Widget templates (types)	43
21. Editing existing widgets.....	45
Using the Widget Hot Key.....	45
From inside the web page.....	45
Widget properties	45
Using Custom Widget Styles	46
22. Exiting the system	47
Use the 'Exit' button	47
Use the browser's 'Close' function.....	47
Log out of Control altogether	47

1. Introduction

This document provides an overview and guidance on how to update websites built with the Boxharry Content Management System ('Control'). If you have any queries about Control please contact Boxharry on 01273 207320.

2. Overview of 'Control' Web Manager

A Content Management System (CMS) is any system designed to facilitate the organisation and distribution of data. The Control Web Manager CMS controls all the data needed to produce and maintain a fully interactive website.

The Web Manager

The Web Manager can be used to effectively manage websites cost effectively and quickly. Key benefits include:

- **Easy to use** – a Windows-style interface provides a friendly and familiar working environment
- **Collaborative workflow** – in-house administrators and external agency specialists working together seamlessly
- **Up and running in minutes** – the Web Manager is deployed from one central server, and requires only a simple install of a few key files on the client's web server
- **Snap-on optional modules** – Email marketing campaign management, recruitment database tools, online retail and more provide unlimited flexibility and expansion possibilities
- **Low cost implementation** – a simple licensing structure allows the procurement of the system at a fraction of the cost of traditionally generated websites
- **Search engine friendly** – the Web Manager produces optimised HTML output, and incorporates many facilities for use by third party SEO specialists, including meta keywords and tags
- **The power of Widgets** – re-usable pieces of information, which can be inserted into any page of the site. Includes dynamic menus, promotional client features, Adapt-integrated forms and many more
- **Hosting freedom** – The Web Manager maintains websites on shared and dedicated web servers
- **Global access** – the Web Manager can be accessed securely from any computer in the world, with no installation procedure

3. How web pages are set up

Web pages are made up of a number of key elements as shown in Fig. 1. Each item shown is described on the following page.

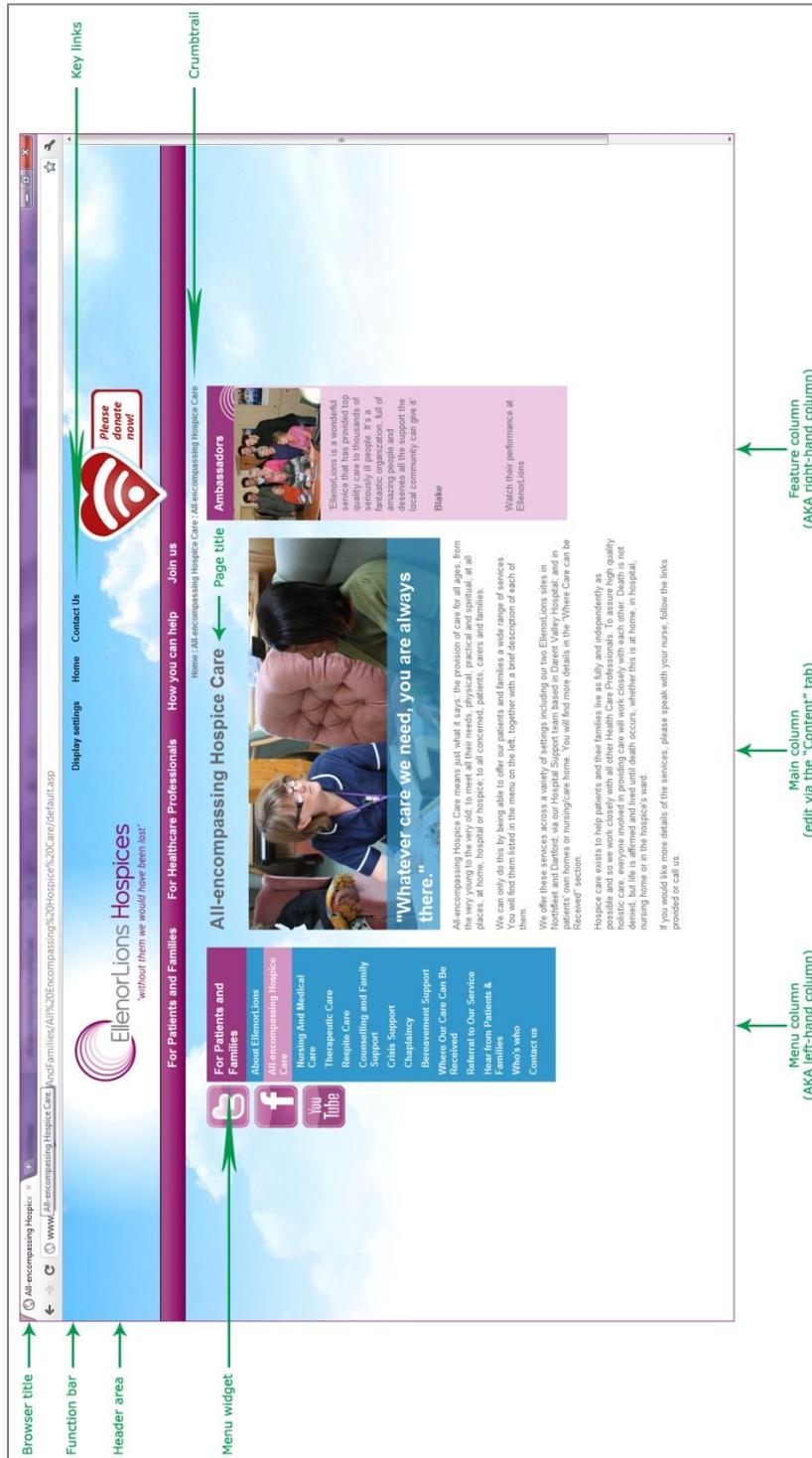


Figure 1

4. The page structure

Web pages are made up of five columns: two outer columns, two inner columns and a central column for the main page content. If you so desire, you can utilise all columns.

- **Left columns** = outer and inner left-hand columns on page. These contain menus and other widgets.
- **Main column** = this is the main body of the page, where main content resides. This is usually made up of text and pictures, and is edited via the 'Content' tab.
- **Right columns** = the outer and inner right-hand columns. These columns contain widgets displaying a range of items including pictures, phone numbers and other additional items. These can be used to highlight key additional items – links to other sections, for instance.

The key reference items and navigational aids on the page

There are a number of key reference and navigational aids available on the web page.

- **Browser Title** – This is the text that appears in the uppermost area and / or tab area of your web browser window (above the menus [File, Edit, etc.]). This is edited in the 'Properties' tab of each page.
- **Page Title** – This is the text which appears as the main heading on the page. This is created and edited in the 'Properties' tab of each page.
- **Function bar** – This is an essential area 'above' the main website, with essential items, such as the 'Display Settings' feature, key links and 'Search' facilities. This is created and edited in the 'Theme' hot key and applies to all pages using the same 'Theme'.
- **Header area** – This is where the logo appears. This is edited in the 'Theme' hot key and applies to all pages using the same 'Theme'.
- **Menu widget** – The items in the menu widget are folders, which have been given a 'Directory' title in the 'Properties' tab of each item. The order in which they appear is controlled by the 'Menu index' of each item, edited in the 'Properties' tab.
- **Key links** – These are essential 'quick' links to important site-wide items, such as 'Contact Us'. These are created and edited in the 'Theme' hot key and applies to all pages using the same 'Theme'.
- **Crumbtrail** – The crumbtrail is usually shown in the top right-hand corner of your website, below the header graphic. This is a trail to show the visitor where they are in the site, i.e. to what folder they have browsed. This is edited in the 'Properties' tab of each page/folder.

5. Logging into Control to edit your website

Content is updated via the Control Web Manager website using your web browser. To access the system go to the following web page: <https://control.boxharry.co.uk>.



Figure 2

To use the Web Manager, enter your personal username and password provided by Boxharry. These have been sent separately for security purposes. You may wish to fill these in below.

Username: _____ Password: _____

Click either 'View systems' in the left-hand column or 'View my current systems' in the central column to view and select the site you wish to update.



Figure 3

NOTE: In Control you have one system for each aspect of your website where you can create and edit all the plug-ins, modules and widgets in your system including Web Pages, Widgets, News Articles, Vacancies, Assets and Store Stock where applicable.

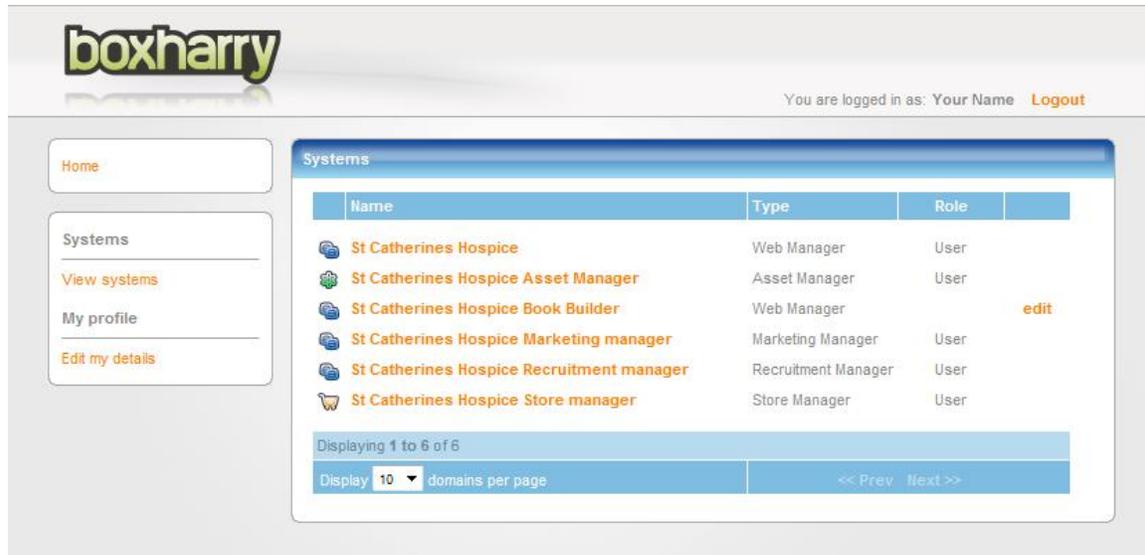


Figure 4

6. A guide to the standard website structure (pages/directories)

All websites have a number of key structural elements.

Websites are made up of a hierarchy of folders (directories) and pages. These folders are the sections of your website content (usually your main menu items) and the web pages are contained within these folders.

You can also have additional folders in your website which are not available in your menu; these include sections that are not active as well as private areas.

default.asp

Every folder should contain a 'default.asp' page at the very least. This is the default page for each folder.

Essential folders:

All websites should include the following folders:

- **Images:** The 'Images' folder is located at the top level (root), with the individual images stored in sub-folders inside to mimic the hierarchy of your folder structure.
- **PDFs:** The 'PDF' folder is located at the top level (root), with the individual items stored in sub-folders inside to mimic the hierarchy of your folder structure.
- **Resources:** The 'Resources' folder is located at the top level (root). This folder contains key navigational elements, including the 'search results' page.

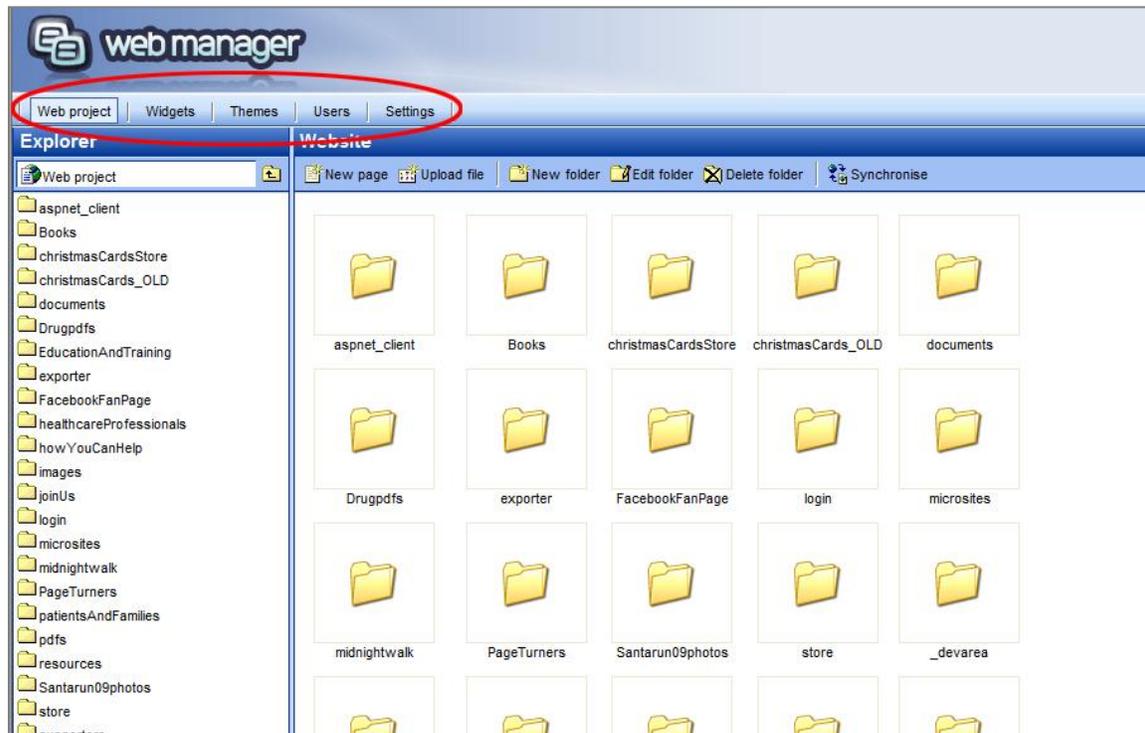


Figure 5

The items in circled in red in Fig. 5 are called 'hot keys'. The number of hot keys shown will depend on the number you require.

You may see a range of different types of hot keys, such as:

- Web project
- Widgets
- Themes
- Users
- Settings

In each hot key and tab, the left-hand column area is called the 'Explorer'; use this to navigate (drill up or down) through the elements in each hot key and tab.

There are three very important **hot keys** in the Control system:

Web Project:

Pages and images are stored in the 'Web Projects' tab.

The 'default.asp' page is the home page of the site – this is the default page at the top level (root) of the website and it does not sit inside a folder.

Every folder inside your website must have a page called 'default.asp'; this is the first page in each folder (or directory).

Widgets:

These are special components providing additional functionality on your website.

They include Menus, Directories, Index, Search, etc. You can create Widgets to provide additional functionality or to display content as required.

Themes:

The design and layout of your web pages is controlled in the 'Themes' tab. All websites have a 'Primary' or default theme. Additional themes can be created as needed, using this hot key. **If you require a new theme, please contact the office for guidance.**

7. How to create a new web page

BEFORE YOU BEGIN, please ensure you disable any 'auto-fill' function you may have set on your browser for automatically filling in your details in web forms before you edit your site in Control. Leaving this function on may break widgets and/or web pages, as areas which should not require any content may be filled by the auto-fill function.

To create a new page on the website:

- Using the Explorer menu on the left-hand side of the screen, navigate to the location on the site (the folder or directory) where you want the page to appear.
- Then click on the 'New page'  New page tab.
- Name the file using the naming convention outlined in [Section 17: Proper naming conventions \(using the correct filenames\)](#) on page 36, then click 'Save'.
- The file will then appear in the Explorer on the left-hand side. You can then click on this file to edit the page as described in the rest of this document, adding all of your content, properties and widgets.

Important note about file names

Every folder inside your website must have a page called 'default.asp'; this is the first page in each folder (or directory).

If there is only one page in a folder, the filename must be 'default'.

The system will automatically add the suffix, '.asp' – you should not type this in the file name.

If you are creating an additional page inside a folder (one which already contains a 'default') then you must give this page a different name.

The file name **MUST NOT** contain any spaces or punctuation, as outlined in [Section 17: Proper naming conventions \(using the correct filenames\)](#) on page 36.

8. The two types of web page

There are two types of web pages you can create in Control which give you two ways to create and manage content (text, pictures, links, etc.) in the main / central column.

- **Standard**—page content is directly placed in the 'Content' tab
- **Widget-driven**—page content is created using widgets placed in the 'Content' tab

Standard web page

When you click on the 'Content' tab of a page, you will see the page content (text, pictures, etc.) displayed directly in this box with a selection of icons above.

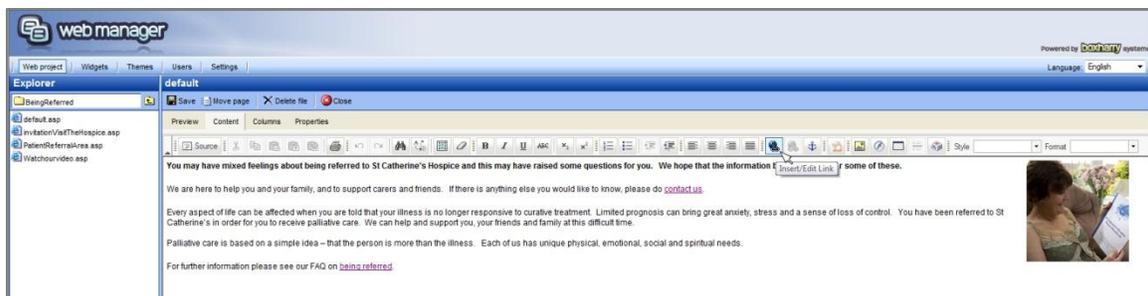


Figure 6

These icons enable you to amend and format the page contents. Depending on the browser you are using, an icon's name appears when you hover over it, like in the example below.

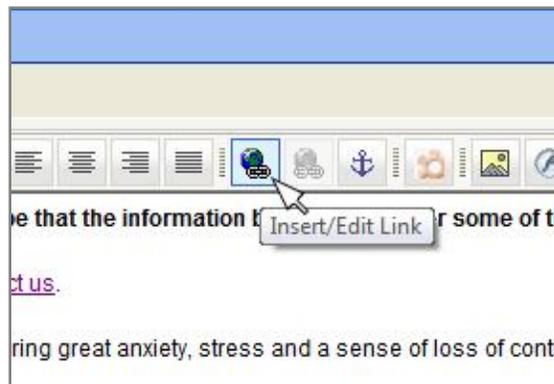


Figure 7

You can edit the contents directly using the sections describing how to edit content in the 'Content' tab ([Section 10: 'The 'Content' tab' on page 18](#)).

Widget-driven web page

The design and functionality of certain web pages means that they may have been built with **widgets** placed in the main column of the page.

For example, each of the items shown below (e.g. 'Our care', 'Raising funds', etc) is a separate widget that has been created and then placed in the central column area of the web page.

These pages are edited in a slightly different way to standard web pages. The process is described here.



Figure 8

If a widget has been used in the main column area, you will see the widget placeholder (cogs) in the content column, as shown below.

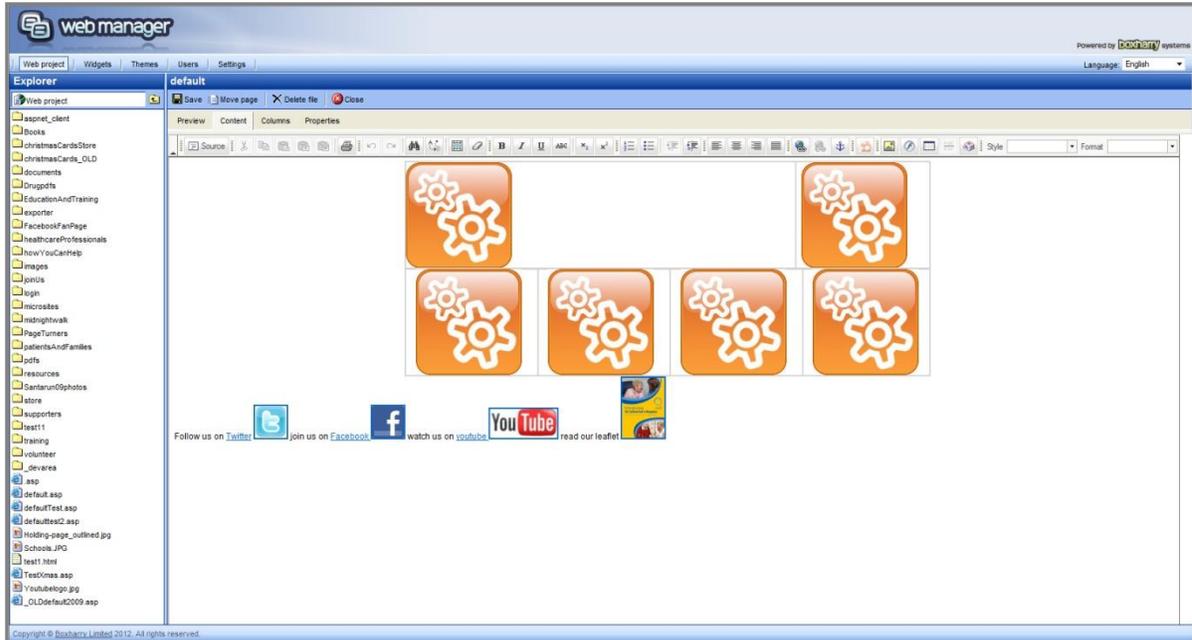


Figure 9

If you need to know the **name** of a particular widget, you can click once on the cogs and then click on the widget icon  in the toolbar. A dialogue box will appear and you will be able to see the name of the widget.

If you need to **edit** the widget, you can close this dialogue box and go to the 'Widgets' hot key to find the widget. Learn more about widgets in [Section 14: 'Working with widgets in the 'Content' tab' on page 29.](#)

NOTE: It is best to edit widgets by using the 'Widgets' hot key, not by clicking 'Select widget' in the dialogue box and navigating to the widget. Your changes may not save.



Figure 10

9. The 'Preview' tab (and accessing an existing web page)

To access an existing page within the website, scroll down through the folders and/or pages in the 'Explorer' panel to find the one you want to update and click on the file name (e.g. default.asp).

When you click once on the page's filename, you will land on the 'Preview' tab by default. This shows a preview of the web page you are working on. **You cannot edit anything in this tab.**

In the central area of the screen you will see the following tabs which are used to edit the web page:

- Preview (default view)
- Content
- Columns
- Properties

The screenshot displays the Boxharry 'Control' Web Manager interface. On the left is the 'Explorer' panel showing a file tree for 'JoinanEvent' with various ASP files. The main area is titled 'default' and shows a preview of the 'St Catherine's Hospice' website. The website preview includes a header with the logo and tagline 'Care, compassion and understanding', a navigation menu, and several columns of content. The content includes sections for 'Give As You Live', 'Join an Event', 'Challenge Events', 'Companies and Employees', 'Donate', 'Fundraise in your Community', 'Giving in Memory', 'Join our Lottery', 'Make a Will Fortnight', 'Making fundraising easy', 'New Horizons Appeal', 'Recycle', 'Remember Us in Your Will', and 'Round the Clock Campaign'. A 'What's On' section features a photo of people in red and yellow vests. The footer of the preview shows copyright information for Boxharry Limited 2012.

Figure 11

Above these tabs there are also some action buttons. These are:

- **Save** — This button saves any changes you have made and closes the page.
- **Move page** — This button allows you to move the page (or file when applicable) from one folder to another. **NOTE:** Moving pages will result in broken links if you have links elsewhere in the site that point to this page. Care must be taken to re-point any links to the page's new location.
- **Delete file** — This button will completely remove the page (or file) from your website. This is permanent. **See the “Very important note about deleting items” in this section.**
- **Close** — This button will close the page **without saving** any changes you have made.

Very important note about deleting items

Do not use the button marked 'Delete file' – this can result in your whole page or widget being deleted from your website and you will incur a cost to replace them.

This button is only to be used by very advanced users.

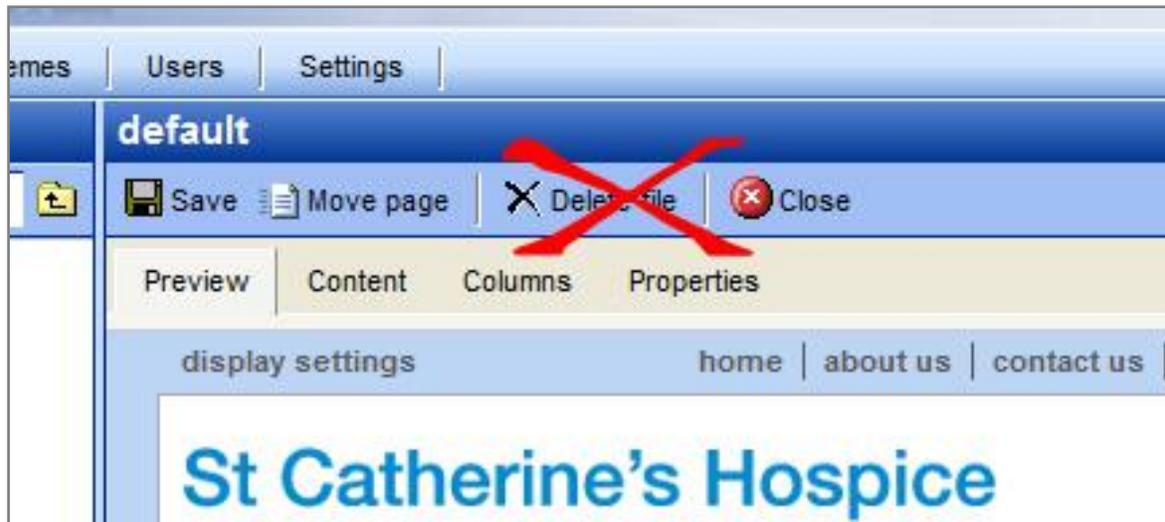


Figure 12

NEVER use the 'Delete file' button! Always use the 'Delete' key on your keyboard.

If you do use this button, a warning will appear, asking you to confirm that you are sure you want to delete.

If you are in **any doubt**, click 'Cancel'.

If you click 'OK' to confirm that you want to delete the item, it will be **permanently removed** from your website.

To remove an item (e.g. a widget or an image) from a web page, click once on the item to select it, then hit the 'Delete' key on your keyboard. (This is done while in the 'Content' tab. See 'Removing a widget from the central column' in Section 14 on page 29.)

10. The 'Content' tab

The 'Content' tab is used for both pages and widgets. It enables you to add content, images, hyperlinks and other elements to your website.

The functions and icons in the 'Content' tab are the same for editing both pages and widgets.

For a standard web page (or to edit the contents of a widget in the 'Widgets' hot key):

Open the page (or widget) and click on the 'Content' tab. You will see your text and pictures displayed in a similar way to the example shown below.

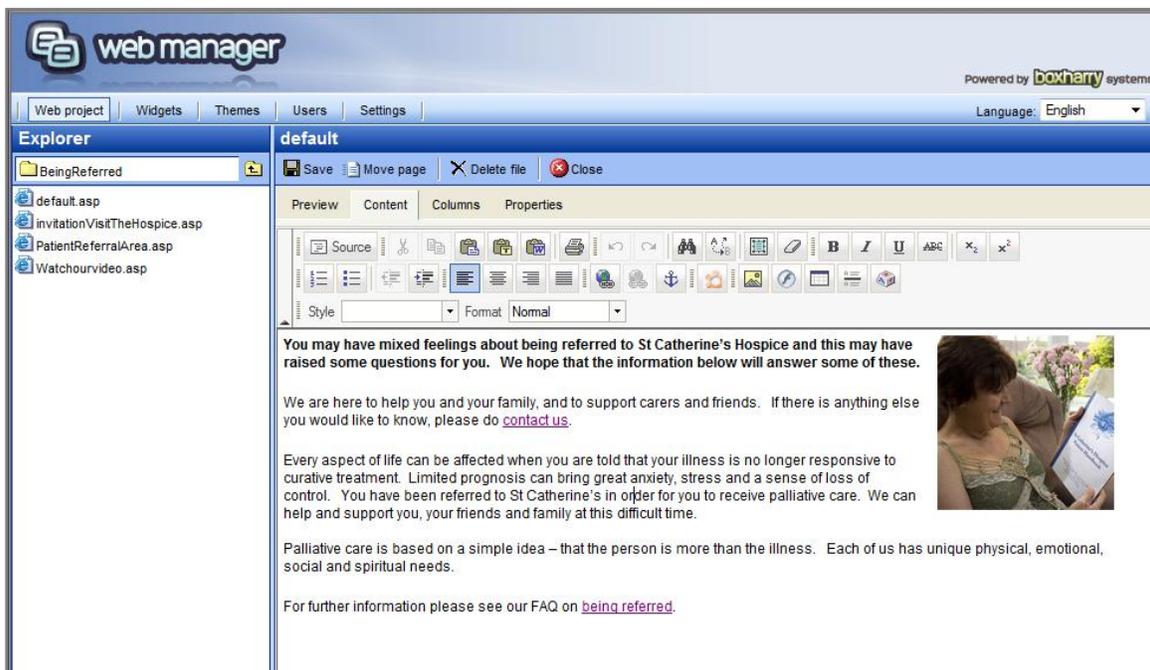


Figure 13

The main text for the page or widget is displayed with a selection of functional icons above. These icons enable you to amend and format the page contents. (These icons are discussed in more detail later in this section under 'A guide to the 'Content' tab toolbar icons'.) When you hover over an icon its name appears, as the below image depicts.

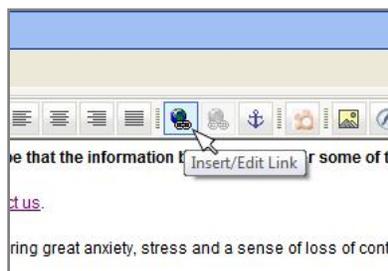


Figure 14

You can add or edit text in this area, including making items bold and / or italic, creating lists etc. You can also add previously uploaded images to the page here. See [Section 13: 'Working with images'](#) on page 27.

A guide to the 'Content' tab toolbar icons

In the 'Content' tab there are a series of icons in the toolbar.



Figure 15

A number of key ones have been identified below:

	Create / edit a link
	Paste from Word (see Section 11: 'Important note about copying and pasting' , page 20)
	Place widget
	Insert image
	Create table

You can use these icons to amend the content on the web page as well as inserting images, links, etc.

You can also make your text bold, italic, indent it or place it in a list format (both bullet and number options). **NOTE: The other text styles, such as font, size, colour, etc. are all automatically controlled by the web template and can only be altered by web design administrators.**

11. Important note about copying and pasting

Text produced in Microsoft Word contains HTML formatting which can affect the consistency of the text styles on the website.

When copying from MS Word, please ensure you use one of the following options:

Pasting (for PC users):

To paste your text as plain text into the CMS Content editor, press the following keys on your keyboard together:

Ctrl + Shift+ V

This will paste any text copied *from any source* as plain text into the CMS.

Pasting (for Mac users):

To paste your text as plain text into the CMS Content editor, press the following keys on your keyboard together:

Cmd + Shift + Option + V

This will paste any text copied *from any source* as plain text into the CMS.

Use the 'Paste from Word' icon

Click on the icon shown below and a dialogue box will appear.

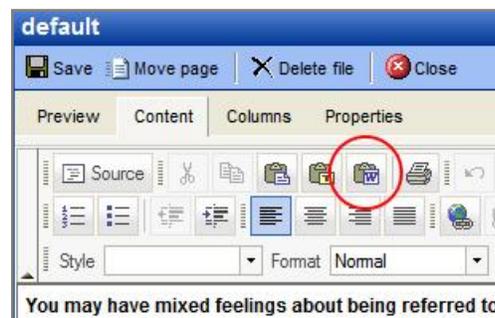


Figure 16

Paste your text into this box and ensure that you use the following settings:

- Ignore Font Face - **DO NOT** check this box
- Remove style definitions – **DO** check this box

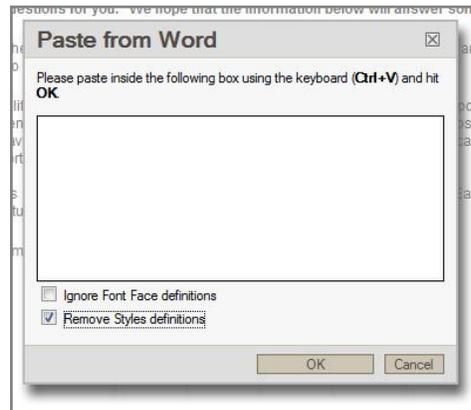


Figure 17

12. Inserting or editing a hyperlink

A number of different kinds of hyperlinks can be used on a web page; the main ones are described here.

About hyperlinks

A hyperlink (also called a link) connects one web page to another. This can include internal links to other pages or documents (files) or external links.

- **Internal Hyperlinks - pages**
Internal page links are links to other pages inside the same website (e.g. a link from the 'About us' page to the 'Contact us' page).
- **Internal Hyperlinks - documents**
Internal document links are links to documents inside the same website, usually PDF files (e.g. a link to a printable/downloadable brochure within the site).
- **External Hyperlinks**
You can also create links from your website to other websites. These are external links. For example, you may want to add a link from your website to the Boxharry website!

Best practice for creating hyperlinks

Hyperlinks should be 'contextual links' within the text – avoid the use of 'Click here'. For example:

For an informative and entertaining insight into internet communication, see the [Boxharry Training Course](#). (The underlined words in blue are the link.)

This structure enables the reader to make an informed decision to follow the hyperlink without re-reading the sentence.

When calling the user to action, use brief but meaningful link text that:

- provides some information when read out of context
- explains what the link offers
- does not talk about mechanics

- is not a verb phrase

For instance, avoid the following sentences on your page:

To access the Boxharry Training Course, [click here](#).

or:

To access Boxharry, [go to the Boxharry Website](#) and get the necessary information.

Both of these sentences divulge too much of the mechanics of getting the Boxharry software.

If you want to call your reader to action, use something like:

Get [Snapper!](#)

or:

Tell me more about [Boxharry's Web Manager](#).

Creating an internal hyperlink - pages

Internal *page* links are links to other pages inside the same website, for example, a link to another page in the site.

- To create an internal hyperlink, open the web page in the Web Manager, and click on the 'Content' tab.
- Type your text and highlight the words that you want to make into a hyperlink (see notes above).

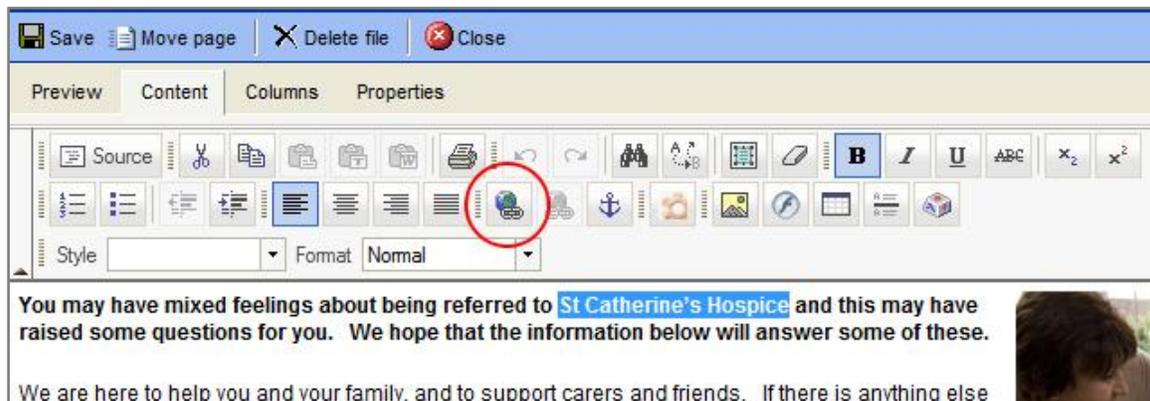


Figure 18

- Click on the 'Insert/Edit link' icon  at the top of the 'Content' tab and the 'Link' pop-up dialogue box will appear as shown below. To create an **internal** hyperlink, click 'Browse Server'.

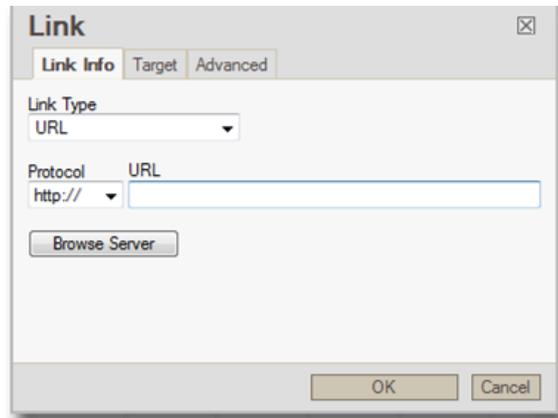


Figure 19

- A new pop-up dialogue box will appear, enabling you to browse through to the page to which you want to link.

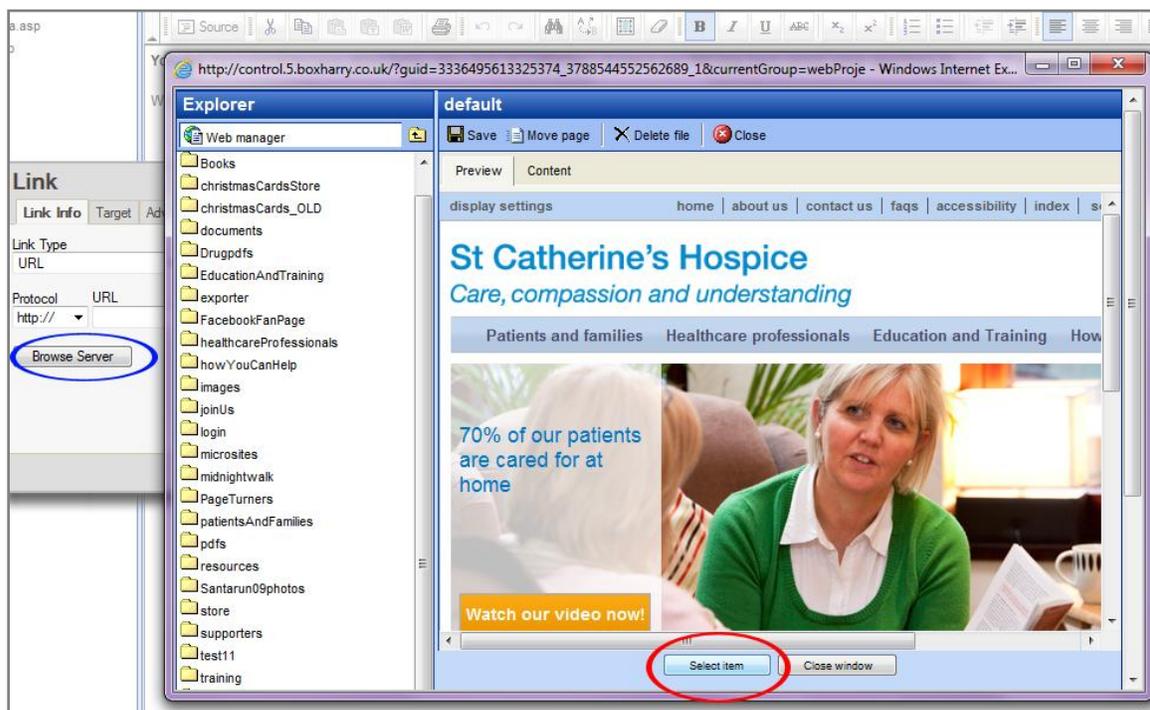


Figure 20

- From here you can browse in the left-hand Explorer menu to select your page. When you click on the page in the left-hand menu, a preview will appear in the main area, then click 'Select item' (Fig. 20—red circle) at the bottom of the dialogue box to choose this page.
- Now click 'OK' in the main 'Link' dialogue box and this will disappear.

Your hyperlink text will now be underlined in the 'Content' tab (Fig. 21).

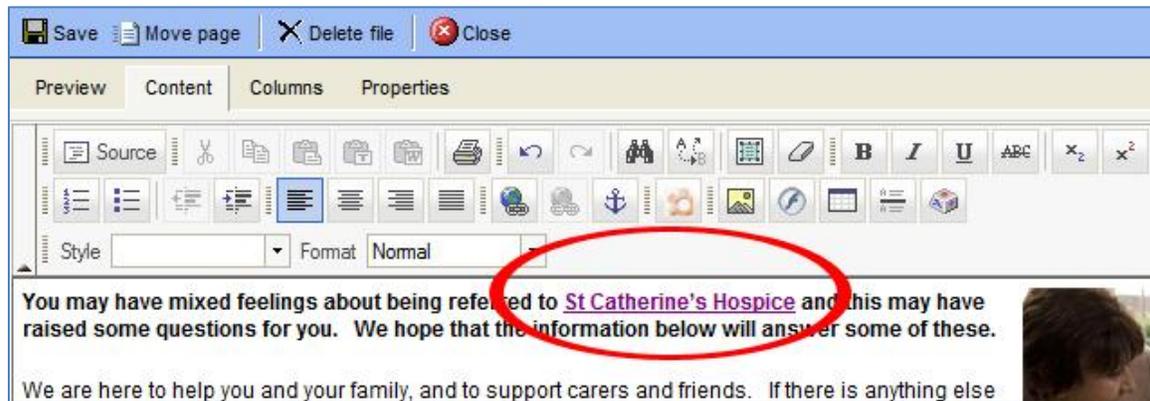


Figure 21

Creating an internal hyperlink - documents

Internal *document* links are links to documents within the same website, usually PDF files.

These links are created in **exactly** the same way as internal hyperlinks to pages, with the addition of one extra step.

When linking to a document, such as a PDF, you should always make this document 'pop up' in a new browser window. This means that your web page will still be open on the user's PC, below the document, so when the user closes the document, they will still see your web page and can continue to view your website.

To do this:

- Open the web page in the 'Content' tab
- Type the text to be made into a hyperlink
- Click on the 'Insert/Edit Link' icon
- Browse server to find your document (PDFs are stored in the PDFs folder, you should upload your document before you make the link).
- When you have found your document, click 'Select item' to choose this one. The selector dialogue box will disappear and you will see the 'Link' dialogue box.

Before you click 'OK':

- Click on the tab called 'Target'.
- Click on the Target: drop-down menu and select the item called: 'New window (_blank)' as shown below. This will force the document to open in a new window when clicked on the website. Doing this ensures the user remains on their current page while being able to access the document.

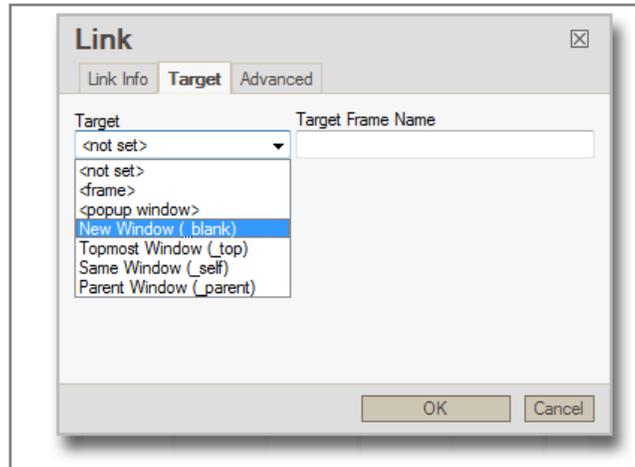


Figure 22

- Click 'OK'. The hyperlink will have been created.

Creating an external hyperlink

You can also create links from your website to other websites. These are external links. To create an external hyperlink:

- Open the web page in the 'Content' tab
- Type or select the text to be made into a hyperlink (as detailed above in 'Creating an internal hyperlink—pages')
- Click on the 'Insert/Edit link' icon 

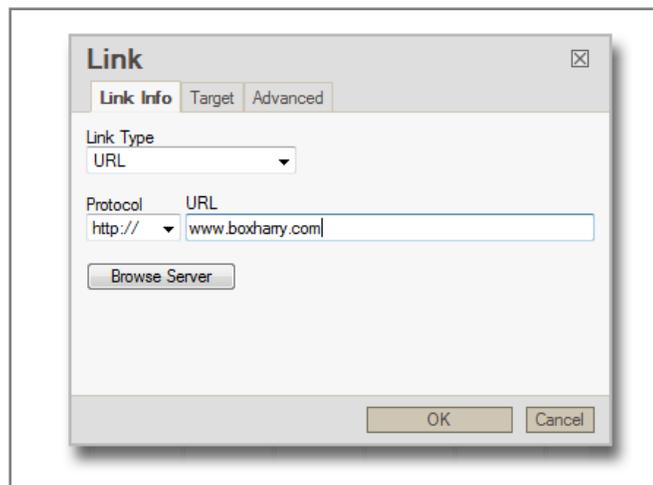


Figure 23

- In the 'URL' field, type or paste the web address to which you want to link, e.g. www.boxharry.com.

Just as with an internal link to a document, you should ensure that this link pops up in a new browser window. The process is exactly the same:

Before you click 'OK':

- Click on the tab called 'Target'.
- Click on the Target: drop-down menu and select the item called: 'New window (_blank)'.
- Click 'OK' and the hyperlink will have been created.

NOTE: If you would like to make the link an email address and open the user's email client (e.g. Outlook), select 'E-mail' from the 'Link Type' drop-down list and fill in the details appropriately.

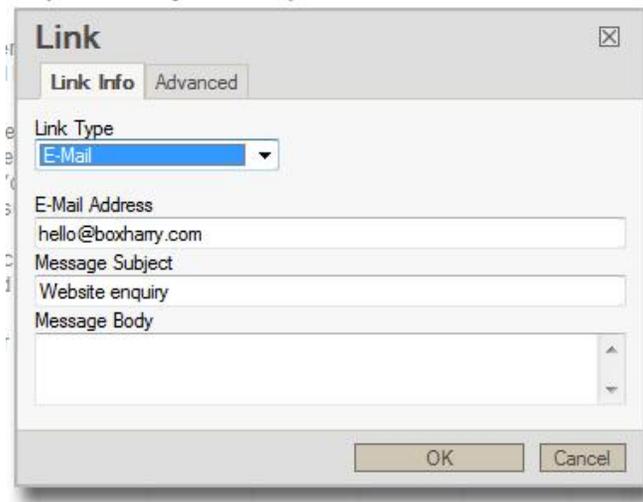


Figure 24

13. Working with images

Before you upload images to the CMS, you must ensure they meet certain requirements.

Guidance for image format, size and resolution

It is very important that you first save images in the correct file format and at the correct size for the page on which it will be placed. In other words, you cannot upload an image that is 2,408 px by 3,097px (px = pixels) if you want to use it in a space that is 150 px by 140px. You must save it at the final size **before** you upload it.

All images should be:

- **72 ppi** (pixels per inch)
- **RGB** colour space (**not** CMYK colour space)
- Saved as any of the following file formats:
 - **.gif**
 - **.png**
 - **.jpg**

NOTE: If you make your images larger than the necessary dimensions and larger than the maximum screen resolution of 72 ppi they will slow down your site considerably and will take a long time to load.

If you save your images in CMYK, they may not appear in the CMS and/or the website at all.

Jpeg / jpg format is what is called a 'lossy' format. This means every time you open a jpeg, image data is lost. Over time, the image quality will degrade, so it is best practice to use .gif or .png to avoid this issue.

Never use any form of punctuation in a filename. This includes, but is not limited to spaces, commas, ampersands (&), percent signs (%) and apostrophes. Underscores (_) are fine.

For SEO purposes, image filenames should be all lowercase and, if they contain more than one word, hyphenated (i.e., to name a file such as the Boxharry logo, call this boxharry-logo.gif).

Left- and right-hand column widths vary from site to site, but generally are no larger than 250 pixels wide. Check with Boxharry for the exact widths of your columns.

Uploading images to the Web Manager

To place an image on a web page or widget, first you need to upload the image to the Web Manager.

- In the 'Web Projects' hot key, open the 'Images' folder in the left-hand menu.
- Drill down to the relevant folder where you want to save the image (inside the 'content' folder).
- Click on 'Upload file', browse to the file you want to publish and select.

Placing an image on a page (or in a widget)

- After uploading your image to the appropriate folder in the Web Manager, open the page you want to place the image.
- Click on the 'Content' tab and use the 'Insert / Edit image' icon  in the toolbar.
- Using the pop-up dialogue box, you can also:
 - place the image left or right on the page using the 'Align' field
 - add in the 'Alt' text (for accessibility) using the 'Alternative Text' field
 - any margins as appropriate using 'HSpace' and 'VSpace'

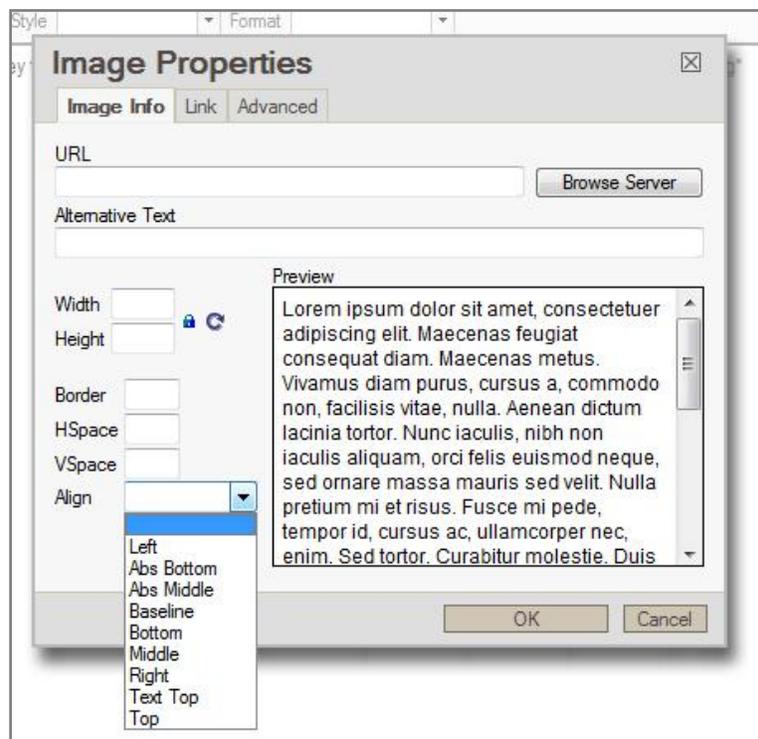


Figure 25

14. Working with Widgets in the 'Content' tab

You can carry out the following tasks with widgets in the 'Content' tab:

- Edit a widget already in use in the central column
- Remove a widget from the central column
- Add a widget to the central column

Editing a widget used in the central column

If the widget is an 'Information Panel', you can edit this using the 'Widgets' hot key (see [Section 20: 'The 'Widgets' hot key' on page 42](#) for instructions). If you are in any doubt, please contact Boxharry for guidance.

You may see a series of cogs one below the other. Each cog represents a **different** widget. Follow the same approach for each widget.

Remember: A widget may be in use on more than one page. If you edit a widget, the changes will be made to every instance of that widget. For example, if you have an 'Opening Hours' widget on several pages, and you make changes to the 'Opening Hours' widget, the changes will be shown on all pages containing that widget.

Removing a widget from the central column

You can also remove widgets from this main column as follows:

- Click once on the Widget (the cog) to activate it, then click on the  icon to confirm that you have selected the correct widget. Click 'OK'.
- Click the 'Delete' key on your Keyboard.

The widget will be removed from this page, but will still exist on your website. If you have used it on other pages, it will continue to display on these pages.

Please refer also to the **'Very important note about deleting items' on page 17**. **If you are in any doubt, please contact Boxharry for guidance.**

Adding a widget to the central column

To add a widget to the main column, you must first create the widget in the 'Widgets' hot key, see **'Creating a new widget' in Section 20 on page 42**. (You can also place a widget that has already been created.)

- Once you have created your new widget, open the web page in the 'Web Projects' hot key as normal and click the 'Content' tab.
- When you have positioned your cursor where you wish your widget to appear, click once on the widget icon  and a dialogue box will appear.

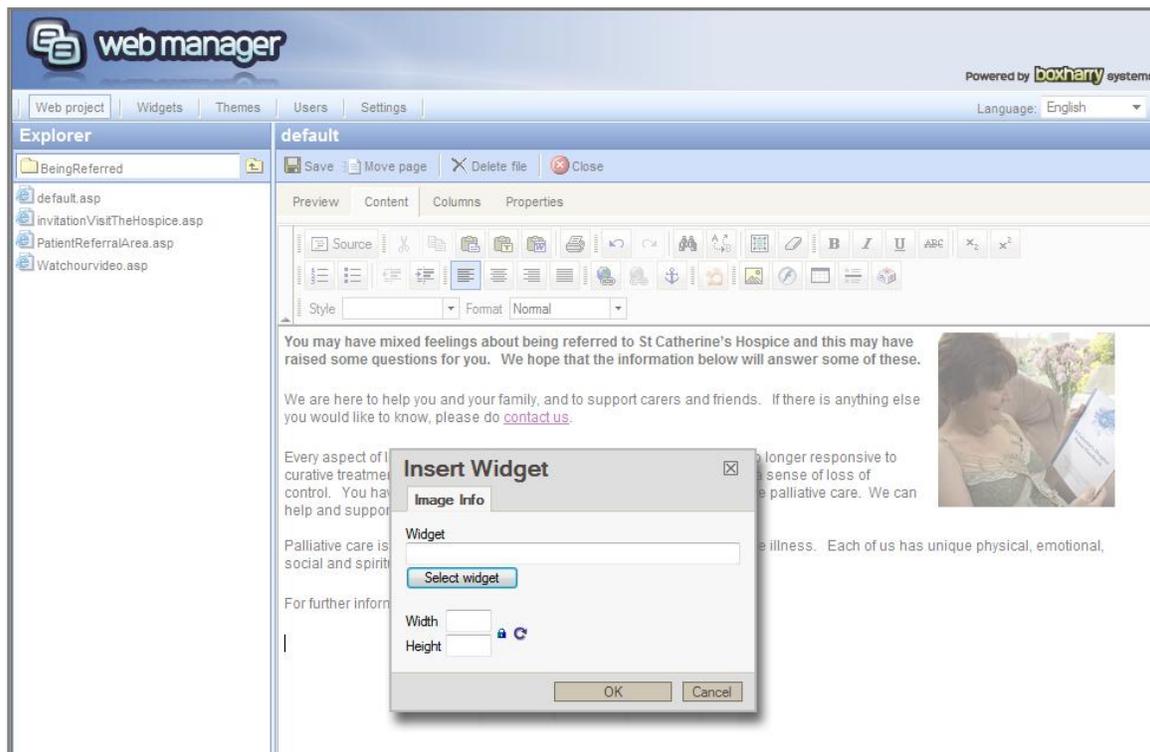


Figure 26

- Click 'Select widget' and a pop-up selector will appear. Browse to find the widget you want to place in this part of the web page.

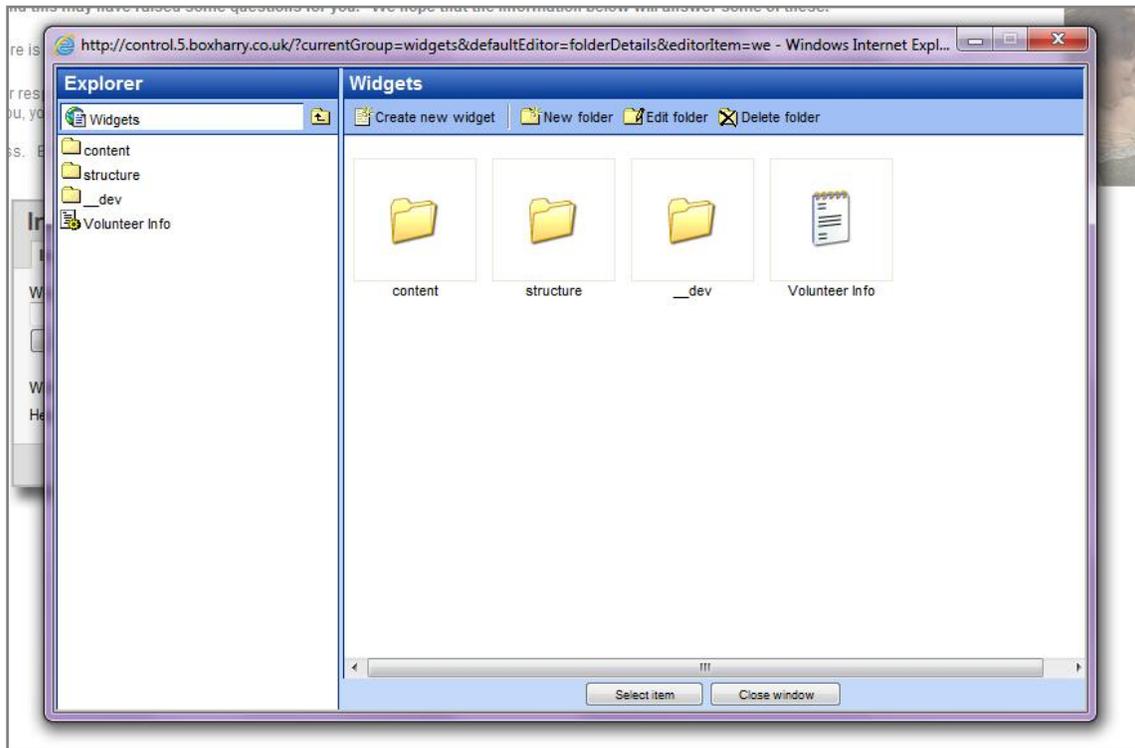


Figure 27

- When you find the widget you want to use, click it so that its properties appear in the main window and click 'Select item' at the bottom of the screen.

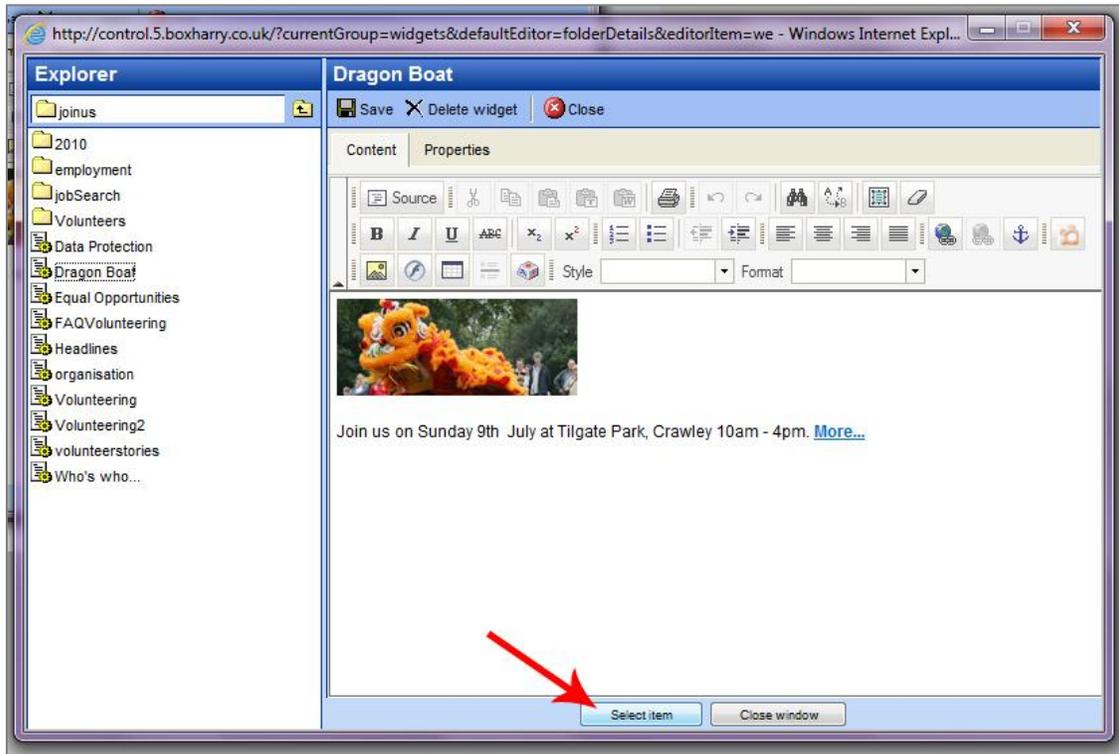


Figure 28

- Click 'OK' in the 'Insert Widget' dialogue box and the cog icon will appear in the 'content' area.

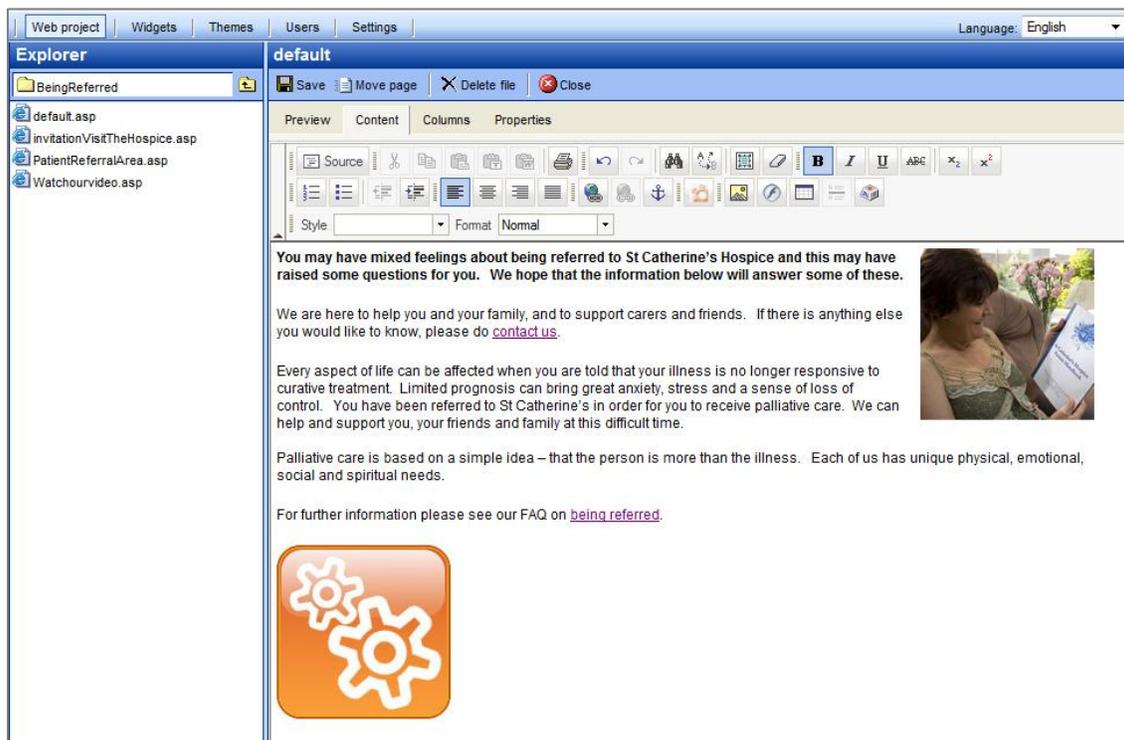


Figure 29

- To both save and preview your changes, click the 'Preview' tab.

NOTE: Clicking on **any** of the tabs ('Preview', 'Content', 'Columns' or 'Properties') will save your work and change the view to that of the tab you have selected. If you simply want to save your changes as you work (to remain in the 'Content' tab) simply click the same tab you are working in. Clicking 'Save' will save **and close** the page.

15. Pages containing forms and other advanced functionality

Web pages can contain special widgets that provide advanced functionality, such as registration, competition forms and other online forms.

When you open a page that contains special functionality inside the Web Manager and click on the 'Content' tab, you will see a 'cog' image, similar to the picture below. This means the content on the page is in a 'widget'. In some cases, you can edit the widget on these pages.

NOTE: If the widget is a form or other type of advanced functionality, please contact Boxharry to make changes to this page.

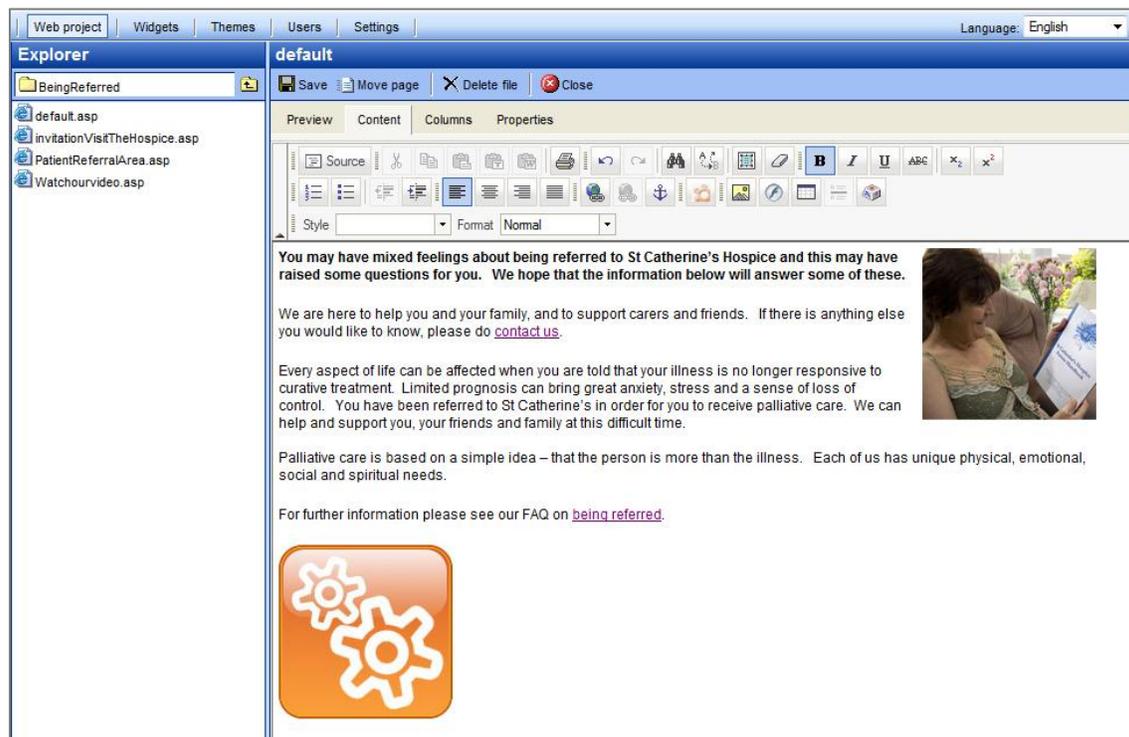


Figure 30

If you see this image, you can click once on the cog and then click on the widget icon .

A dialogue box will appear and you will see the name of the widget. You can then go to the 'Widgets' hot key to find the widget.

If the widget is an 'Information Panel' (a standard widget made up of text and pictures), you can edit this using the 'Widgets' hot key (see [Section 20: 'The 'Widgets' hot key' on page 42](#) for instructions). If you are in any doubt, please contact Boxharry for guidance.

Forms

Please note that forms are built using advanced functionality. If you need to make changes to an existing page containing a form, or wish to have a new form created on your website, please contact Boxharry for guidance. Advanced CMS users should refer to Form Builder Training Notes.

News articles, store items and other advanced features

These items are displayed on your web page using special widgets, such as the 'News article' widget. These features are edited via the relevant module, e.g. 'Marketing' module for the news articles. Please refer to the separate guidance notes or contact Boxharry for guidance.

16. Publishing PDFs on your web page

First, you will need to upload the PDF file to the appropriate folder in the Web Manager:

- In the 'Web Projects' hot key, open the 'PDFs' folder in the left-hand menu.
- Drill down to the relevant folder where you want to save the file.
- Click on 'Upload file', browse to the file you want to publish and select. (Depending on the file size, it may take some time for the file to upload.)
- After the PDF has uploaded, open the page where you want to place the link to the PDF.
- Click on the 'Content' tab and select the text or image you want to link to your PDF
- Use the 'Insert/Edit Link' icon  in the header icon area.
- Using the pop-up dialogue box, click on 'Browse server' and find the folder containing your PDFs.
- When you have found the PDF file, then click on the 'Target' tab and select: 'New window (_ blank)' as the option for this, then click 'OK' and your link will be created.

Guidance for creating PDFs for the web

All PDFs should be set to '**Screen optimised**' setting (in Acrobat) and should be **1MB or smaller in size**.

Never use any form of punctuation in a filename. This includes, but is not limited to spaces, commas, ampersands (&), percent signs (%), colons (:) and apostrophes. Underscores (_) are fine.

For SEO purposes, PDF filenames should be all lowercase and, if they contain more than one word, hyphenated (i.e., to name a file such as Terms and Conditions, call this terms-and-conditions.pdf).

17. Proper naming conventions (using the correct filenames)

All items (pages, images, PDFs, etc.) should be named using the following conventions:

- **Never use any form of punctuation in a filename.** This includes, but is not limited to spaces, commas, ampersands (&), percent signs (%), colons (:) and apostrophes. Underscores (_) are fine.
- For SEO purposes, PDF filenames should be all lowercase and, if they contain more than one word, hyphenated (i.e., to name a file such as Terms and Conditions, call this terms-and-conditions.pdf).

This system also applies to naming new pages, folders and widgets.

18. The 'Properties' tab

The 'Properties' tab contains the following information about a web page:

File name:	This appears in the Explorer on the left-hand side. The file name must not contain any spaces or punctuation.
Page title:	This is the text which appears as the main heading on the page.

APPEARANCE:

Theme:	Themes are the templates used to produce the website style. These are set up separately and can be applied to any page on the site. The default theme is called 'Primary theme'
Custom style:	If you've extended your site's styling by using custom CSS styles, you can apply the style here. Ask Boxharry for guidance.

REFERENCE:

Directory name:	If a page is to be displayed in a menu it must be given a Directory name.
Index name:	In order for the page to be automatically displayed in the index it must be given an Index name. This does not have to be the same as the Page Title, and should be chosen to reflect the likely words users may look for in an Index (alphabetised).
Crumbtrail name:	The crumbtrail is usually shown in the top right-hand corner of your website, below the header graphic. This is a trail to show the visitor where they are in the site, i.e. what folder they have browsed to.
Sitemap name:	The name that will appear in your site map, if you use this widget.
Menu index:	This determines where on the menu a page is displayed (if it has been given a Directory name). Changing these numbers can alter the order of your menu listing. (If you want to move a page up the menu, give it a lower number.) 0 is the default number.

SEARCH ENGINE:

Browser title:	<p>This is the text that appears in the uppermost area of your web browser window (above the menus [File, Edit etc]).</p> <p>It is helpful for search engine positioning to add a meaningful Browser title to each page.</p>
Meta keywords and descriptions	<p>Can be added here – these are helpful for search engine positioning.</p> <p>Up to 30 meta keywords (relevant to your business and the page) and a short description.</p>

SSL enabled:	<p>If a website has an SSL certificate for secure pages (https), you can activate this on a page by page level.</p> <p>Please contact Boxharry if you are unsure about this facility.</p>
Status:	<p>Pages can be turned on or off using this function. If the page is turned off here it will not be displayed in the menu.</p>
System version:	<p>This relates to the version of Snapper used by the page.</p> <p>Please contact Boxharry if you are unsure about this facility.</p>

Usually, once a page is set up, you will not have to amend these items.

19. The 'Columns' tab

The 'Columns' tab enables you to select existing widgets to be displayed on the menu and feature columns of the page. (Widgets are created using the 'Widget' hot key, next to 'Web Project', see [Section 20: 'The 'Widgets' hot key' on page 42](#)).

Adding a widget to the menu and/or feature columns of a page

- To add a widget to a page, click on the 'Columns' tab and you will see the following screen:

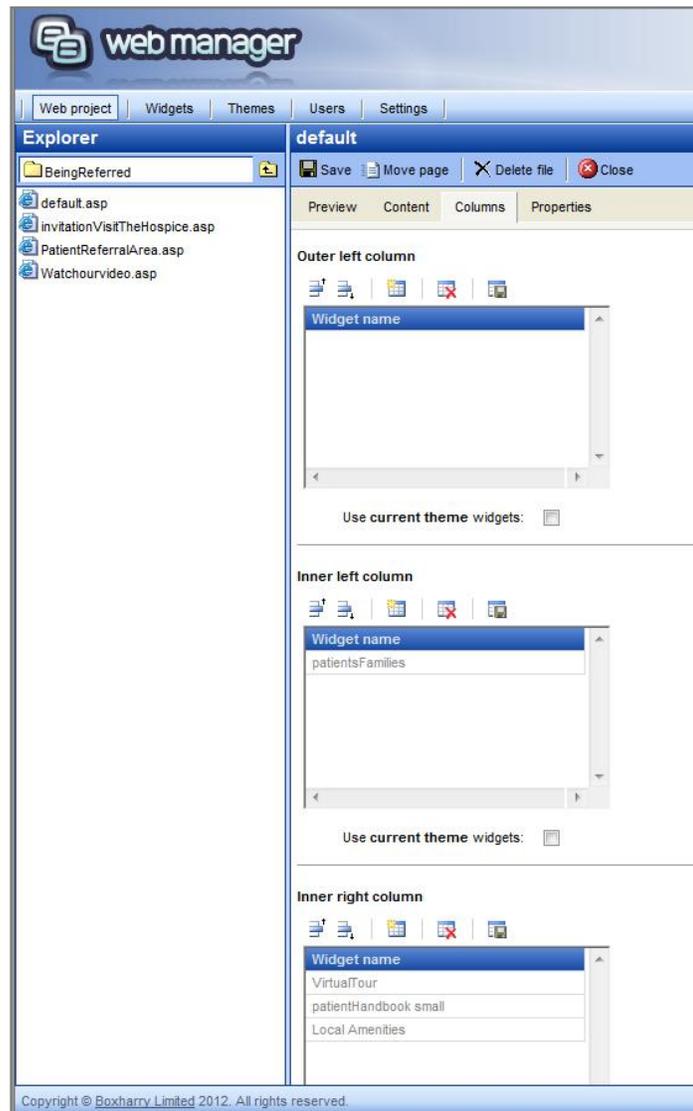


Figure 31

- Go to the column to which you want to add the widget, and click the 'Add widget' icon . (There is no need to use the 'Outer left' or 'Outer right' columns.)

- The following screen will appear. Click the magnifying glass to the right of the 'Select a widget' field.



Figure 32

- In the resulting pop-up, navigate to the widget, click the widget to activate it and show the properties in the main part of the window and click 'Select item' at the bottom of the pop-up window.

NOTE: Most widgets you will need will be located in the 'content' folder rather than the 'structure' folder.

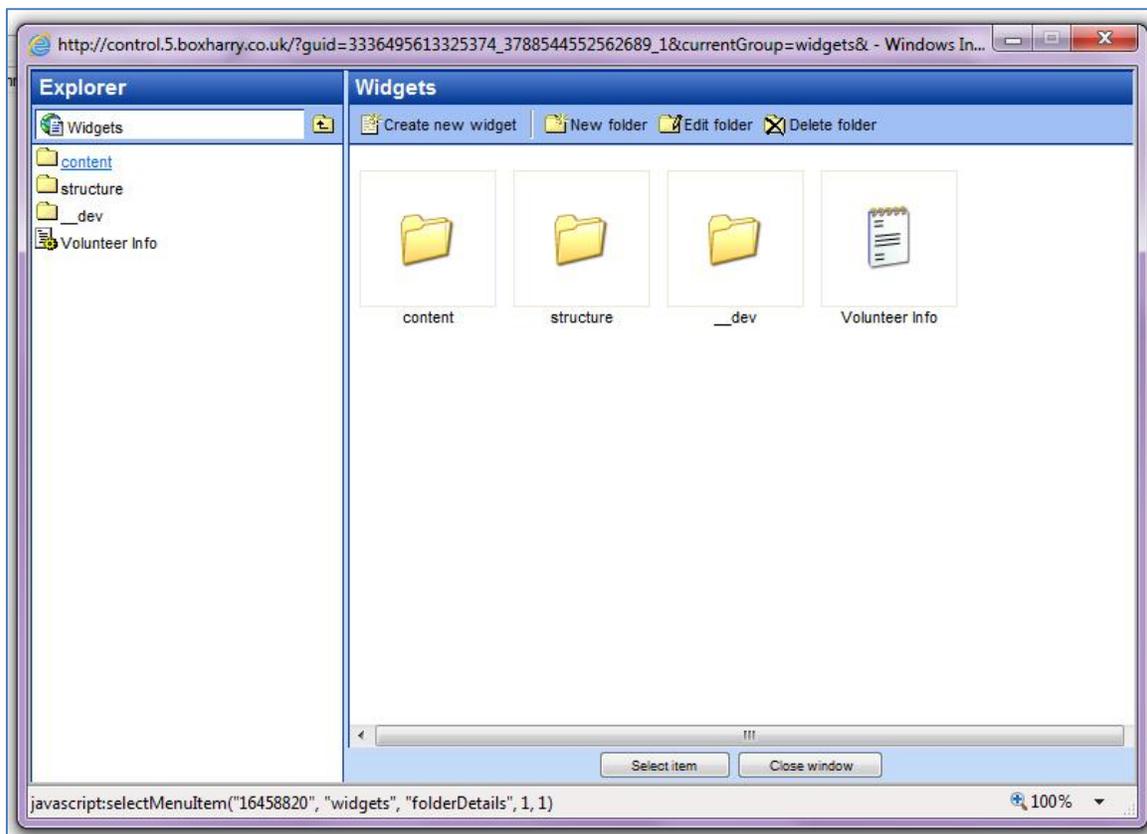


Figure 33

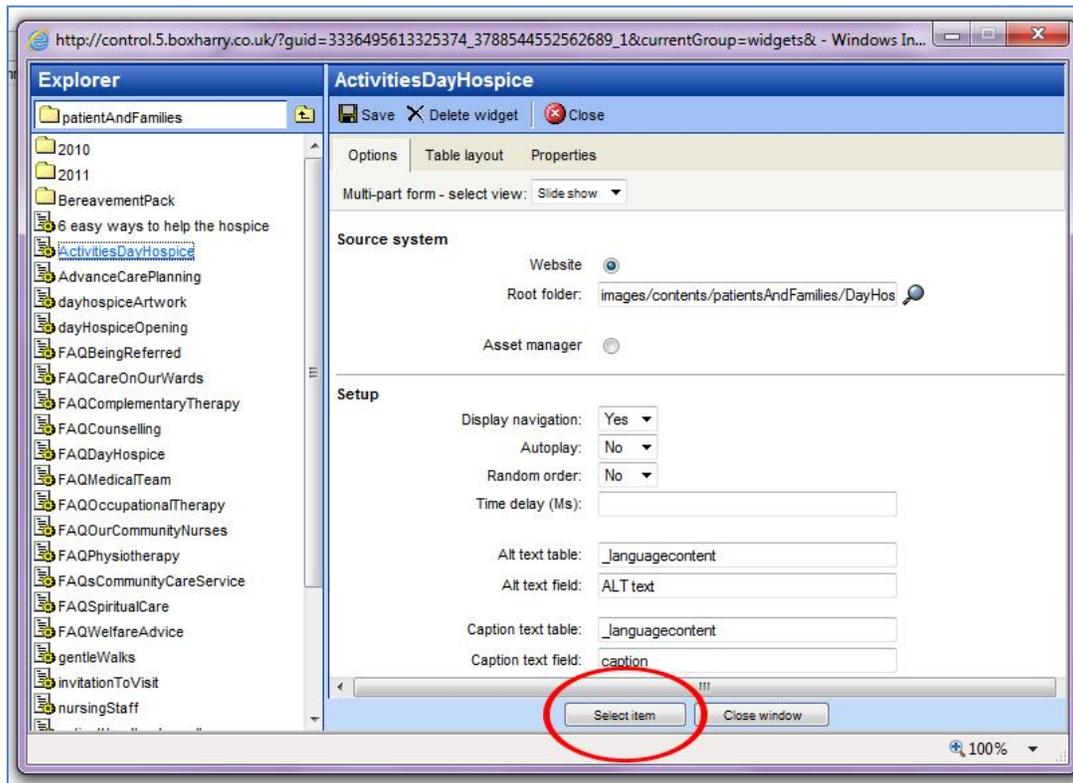


Figure 34

- You will be returned to the 'Add a new widget' screen where you should click 'Save'. This will return you to the 'Columns' tab view
- To change the vertical order of widgets select the widget you wish to move and then click the up or down buttons to move position. **Click the 'Save Item List' icon**
- To remove a widget from a column, click on the widget then click on the 'Delete' icon . The widget name will be crossed out in the list. **Click the 'Save Item List' icon**



Figure 35

NOTE: When you have made changes to your page, please ensure you click 'Save'. If you accidentally hit 'Close' without saving, your changes will not be saved.

20. The 'Widgets' hot key

Widgets are re-usable parcels of information. By simply 'snapping' them onto a page in any required position, they can be quickly and effectively deployed.

Widgets can be placed on many pages of your website and, when you update the one widget, the changes will be applied to all instances of the widget. In other words, every page displaying the widget will automatically update.

These widgets contain information that is either dynamically generated from pre-defined scripts (e.g. menus) or customised by website administrators (such as a widget displaying contact details).

Built-in widgets

Built-in widgets automatically provide special functionality from pre-defined scripts. **Only Boxharry administrators can edit these widgets.** If you are in doubt, please contact Boxharry for guidance.

Creating a new widget

To create a new widget for use on the website:

- In the 'Widgets' hot key, click on the 'content' folder in the left-hand 'Explorer' menu and drill to the folder where you will place the widget.

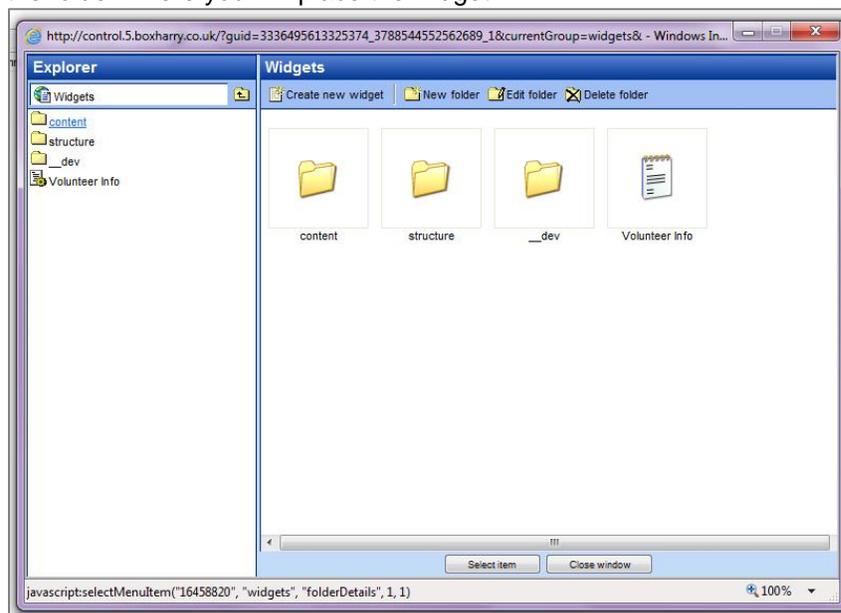


Figure 36

- Click 'Create new widget'.

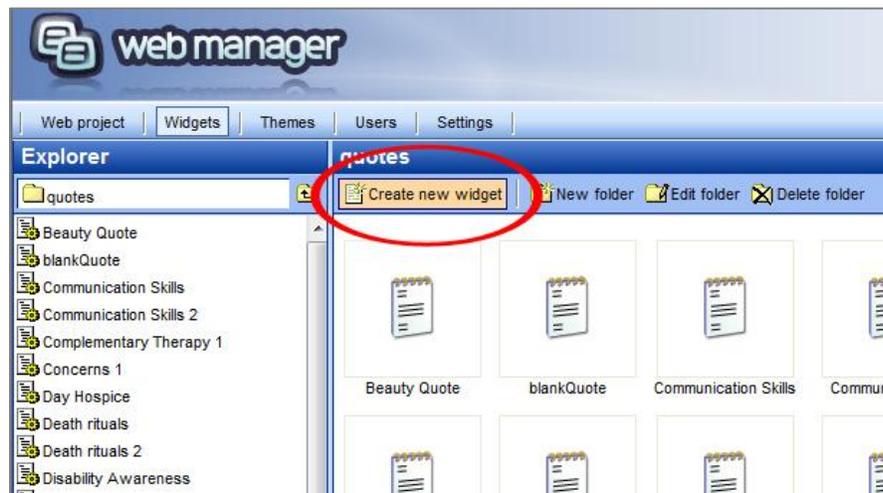


Figure 37

- Enter a name for the widget in the 'Widget name' field and select the widget type you require from the drop-down list.

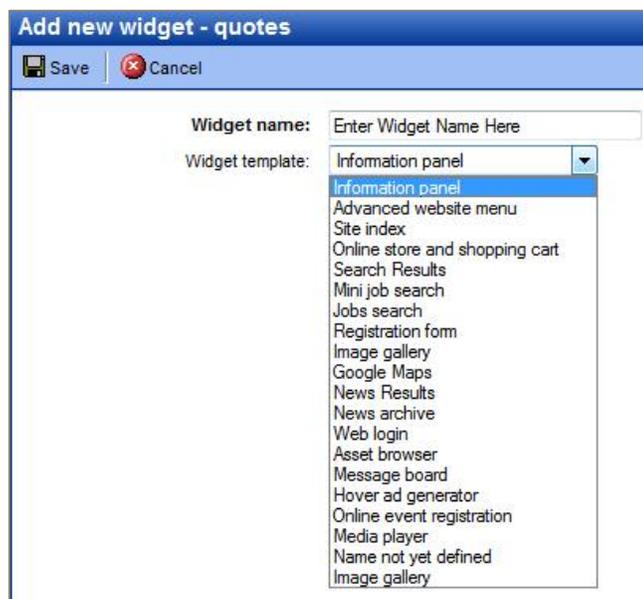


Figure 38

- Click 'Save'. Your widget will appear in the 'Explorer' list in the left-hand column.
- Click the widget in the left-hand column in order to add content to it. (This process will be different for different widget types, but if it is an 'Information Panel' the process will be similar to adding content in the 'Content' tab.)

Widget templates (types)

There are a number of different types of widgets, including but not limited to the following. You may see some of these in the list of widget types when you create a new widget:

- **Information Panel** – a standard widget for displaying text and pictures. This is the most commonly used widget.
- **Advanced website menu** – these widgets are used to set up site menus
- **Google maps** – create and configure Google maps on your website
- **Image gallery** – create and manage image galleries on your website
- **Site index** – these widgets manage and display the A-Z index of your site content
- **Search/Search Results** – these widgets manage the search facility on your website
- **Registration form** – create online forms
- **Log-in/Log-out widgets** – these widgets manage the login facility for websites with user registration and managed areas
- **Competition entry form** – this widget is used on competition pages and contains the standard entry form questions
- **Language selector** – this widget is used on multi-lingual sites
- **Online store and shopping cart** – this widget is used on e-commerce sites and control the shopping process, including the Shopping Basket and payment processing

When you have selected the appropriate widget type, enter a name for the widget and click 'OK'. The widget will then be displayed in the 'Explorer' list on the left-hand side. You can now click on the widget to edit it.

For more information about widgets, contact Boxharry.

21. Editing existing widgets

To edit the contents of an existing widget, there are two options:

Using the Widget Hot Key

Click on the main 'Widget' tab next to 'Web project'.

From inside the web page

In the Web Manager, open the page where you have placed the widget in the menu or feature column.

Go to the 'Columns' tab and double click on the widget you want to edit. This will take you into the 'Widgets' hot key, and will open the widget to enable you to make changes.

Click on the relevant widget and, like a web page; you will see a preview of the widget.

You will also see a list of tabs. These vary according to the type of widget, but typically you will see:

- **Preview** – shows a preview of the widget
- **Properties** – enables you to add a title for the widget (to display on screen), as well as setting Custom widget styles
- **Content** – the same as the page 'Content' tab

For some widgets, including 'Menus' widgets, you will also have a tab called 'Target'.

Widget properties

Widget name	This appears in the Explorer on the left-hand side
Title	This is the text which appears as the main heading on the widget.
Custom style	<p>If a 'custom' style has been created for a widget, you can type the name of the style here and the widget will pick up the style.</p> <p>For example, 'blueWidget' is the name of a custom widget style set up in the Theme style sheet (see notes on next page).</p>
Widget information	Information about the date of creation and amendment of the widget are displayed below.

Using Custom Widget Styles

Widgets have a pre-set style that is controlled by the Theme applied to the page.

For example, your website theme may make all 'Information Panel' widgets appear with a lilac-coloured title bar with blue heading text and show the main text on a white background, like in the example below.



Figure 39

In addition, it may be possible to have 'Custom widget styles' – these additional styles extend the layout of your web page, enabling you to use additional, pre-set colour schemes to enhance your web page. For example:

- limeGreenHeadingWidget would display a green title bar with a white background
- orangeHeadingWidget would display an orange title bar with a white background

In the widget's 'Properties' tab, you can add the 'Custom widget style' name (exactly as provided to you), and 'Save'. When you preview the widget, you will see the new colours in use.

Each website may have its own set of 'Custom widget styles' built into the template. Please refer to your list of custom widget style names (provided separately by Boxharry).

22. Exiting the system

Some systems have an 'Exit' button and some do not.

Use the 'Exit' button

If your system has an 'Exit' button, you will see this in the top right-hand corner of the tab bar (red circle in Fig. 40). This will close the tab / window. You will then need to log out of Control altogether (See 'Log out of Control altogether' below).

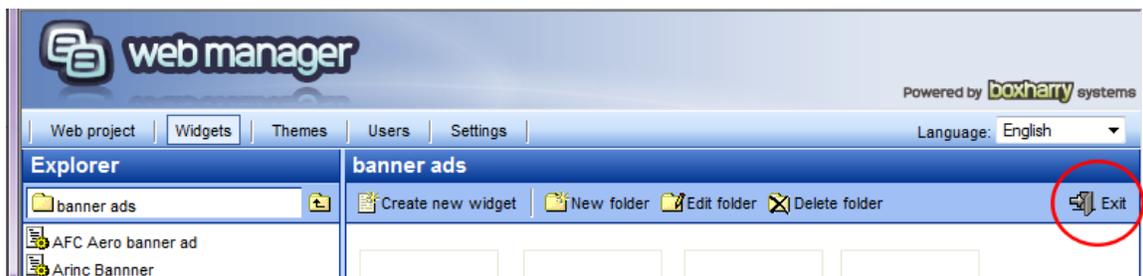


Figure 40

Use the browser's 'Close' function

There is no logout button within individual systems, only on the 'Systems List' screen. In order to log out of a system, simply close the tab (red circle) or browser window (red arrow).

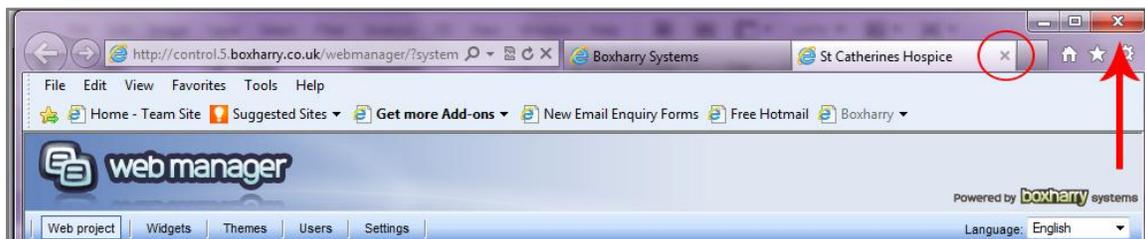


Figure 41

Log out of Control altogether

Click 'Logout' on the 'Systems List' screen seen in Fig. 42. (You can also simply close the browser window.)

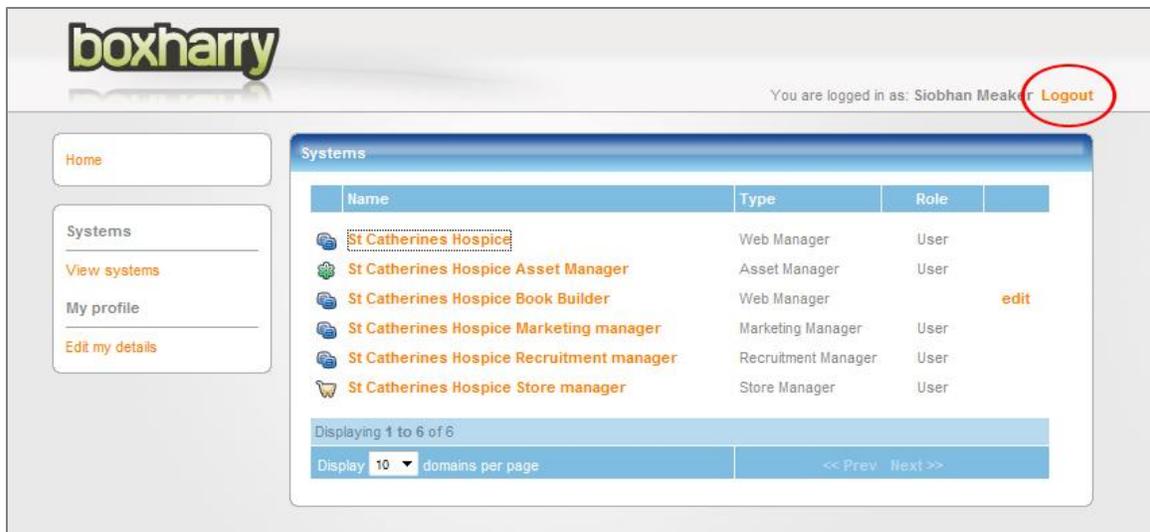


Figure 42