cubik

Introductory User Guide

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Prepared by

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Revision History

Version	Date	Who	Comments
1.1	22 August 2011	Louise Radcliffe	Initial revision.
1.2	30 August 2011	Carrie Borton	Added extra details to some sections.

Table of contents

Introduction

This document will take you through the basics of creating pages and editing your website, as well as introducing you to the toolbar and showing you the options available in the Control Panel. The information in this document will have been covered in your training session. If you have not had a training session and would like to arrange one, please give us a call on 0113 2386735. You can also find this information on our help website (www.cubik.co.uk/help), and where further information is available on the site, links will be provided.

Signing in to your website

The sign in link on your website is usually at the very top or very bottom of your site. You will be asked for either a username or email address and a password. This will have been given to you in your training, or by the administrator in your organisation who set up your user account. After you have signed in, you will see that you have an ‘Edit this Site’ link in the top right hand corner of your screen. This is what you use when you want to make any changes to your site, and clicking it will take you to what we call the ‘unpublished’ view of your website. This means that you can see any pages that are hidden or have been saved but not yet approved, and therefore do not appear on the live site.

Toolbar Options

When you click the Edit this Site link to bring up the toolbar, you will see something similar to this, with two rows of buttons.

Above the toolbar, you can see the template type of the current page, the status of the current page, and optionally whether the page is hidden, and if it has a start or stop publishing date that is in the future. If the page is approved and live on the website, the text will be green. If the page is requiring approval, the text will be blue.

Different buttons on the toolbar will be active depending on the status of the page, your current permissions level (admin, editor or author) and which view you are looking at (unpublished or edit). You can hover over any of the buttons to see a description of what the button is used for.

To hide the toolbar and view the site as a normal site visitor, simply untick the Edit this Site link.

Create New Page

As you might guess, this is the button you need to press when you want to create a new page on your website. When you click the button, you will see a list of the available template galleries (this is usually just ‘content’ and ‘navigation’ to begin with). If you choose one of the template galleries, you will see a list of the available templates. A template is a type of page which can be used on your website, and you will have access to different templates depending on the needs of your site. The basic templates will be described later on, and you can find more information about the advanced templates on our help website (www.cubik.co.uk/help). To choose the template that you would like to use, you need to click the ‘hand’ button to the right hand side of the template name (not the icon to the left of the name). Once clicked, the template galleries will disappear, and you will be taken to the new page. Most of the pages that you will create on the site will be General Content pages (you can find more information about these later on).

Create Connected Page

If you have two pages on your website that need to share the same content, you can create a Connected Page. Rather than copying the page and having two separate pages which need maintaining independently, a connected page remains linked to the initial page. Any time you update either of the pages, the content of the other page will be updated automatically.

An example of when you want to use this might be if you have a news article which you want to appear on the main site but also in a secure area which is only accessible by certain site users, you can create a connected page to save you time when you update the pages.

When you click this button, the first screen you will see allows you to choose which channel (folder or section) you want the connected page to be placed in. Next, you need to choose what template the connected page should use. Usually, you will just see the template that the current page is based on, so just click the ‘hand’ icon to the right. The last thing you need to do is to save the page. When you click save, you will see that the *Name* field is greyed out. This has to be the same as the page is connected. However, you can change the *Display Name* to something different if you like.

To ‘un-connect’ a page, you simply need to delete one of the connected pages (leaving the other in place). You can also connect a page as many times as you like, so you could have the same page in 4 or 5 different locations.

View Connected Pages

This button will be highlighted if the current page is a connected page. When you click on this button, you will see a screen with a list of the pages that this page is currently connected to. This shows the display name of each of the connections, and also shows you the location of the page on the site. There is a 'Go To' button next to each of the pages in the list, allowing you to quickly jump to that page on the site.

Edit

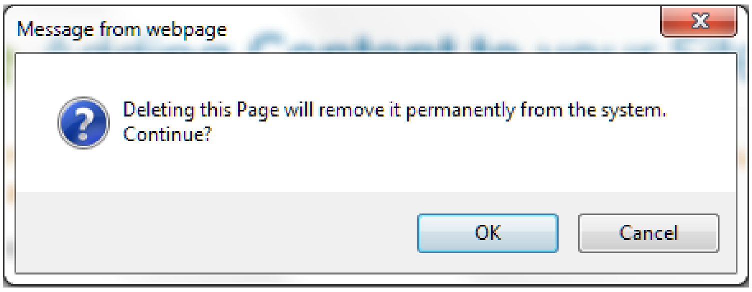
To make any changes to the page once it has been created, you need to click the Edit button. Clicking this button will show you a display which is the same as when you first created the page, so that you can make changes to any of the placeholders on the page.

Preview

Clicking this button when you are editing the page will allow you to see what the live view of the page will look like. We would recommend that rather than using this button, the best way to see what the page will look like is to click the Save and Exit button. This will show you what the page is going to look like, but also has the advantage that the changes that you have made have been saved, so if you have any problems with your computer, the work that you have been doing is not lost.

Delete Page

If you decide that you do not need a page any more, you can use this button to delete it from the system. It is important to remember that once a page has been deleted, **we cannot get it back for you**. When you click the Delete Page button, you will get a pop-up message to ask you if you are sure you definitely want to delete the page.



If you are not sure whether you will need the content again later, the best thing to do is to expire the page (see: Page Properties). To avoid issues with pages being deleted inadvertently, we can remove the delete button completely, or we can only enable the button for full admin users. Let us know if you would like to set this up for your site.

Copy Page

This button is used to make a copy of the current page. When you click this button, you will get a pop-up box which you can use to choose where you would like the copy of the page to be placed. This can either be a different location on the site, or into the same channel. Once the page has been copied, the content is completely separate (unlike a Connected Page). This means that any changes you make to one version of the page will **not** be carried over to the copy of the page.

Move Page

This button is used to move the current page to a different location on the site. Similar to the Copy Page button, when you click on this button, you will see a list of the channels on your website, to allow you to choose where you want to move the page to. Once the page has been moved, you may need to re-approve the page for it to go live in the new location.

Submit

When an author is working on the website, they will not have permission to approve the page onto the live website. The Submit button allows them to submit the page so that an editor or an administrator on the website can approve the page for them. When the page is submitted, it will appear immediately in the Approval Assistant of any editor/administrator with the necessary permissions to approve the page, and an overnight email will also be sent out if the editors have opted in to receive these.

Approve

The Approve button will be available to editors and administrators and is used to make any currently saved (unpublished) changes go live on the website. If the page is Saved or Waiting for Editor/Moderator Approval, this button will be active to allow you to approve the page. When the button is pressed, the page will go live immediately (or at the date specified in the Page Properties dialog).

Decline

If a page has been submitted for your approval, but you are not happy with the content of the page, you can use the Decline button instead of approving the page. When you click this button, you will be asked for a reason as to why you are declining the page. This reason will be emailed back to the person who submitted the page for your approval, so it is best to make this as detailed as possible. That user will be able to re-edit the page, and then submit the page for your approval again.

Save

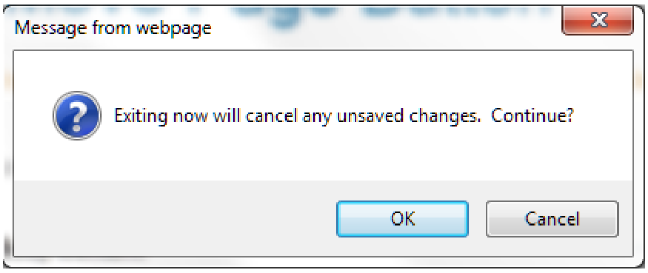
This button can be used when you are editing a page on your website, and allows you to save the changes that you have made, and then continue working on the page. When you click this button on a new page, you will be asked for a Name and Display Name. The Name of the page is used in the URL, e.g. a page called 'contact-us' in the home channel of your site would have the URL 'www.yoursite.com/contact-us'. It is best for the Name to be all lower case, and to have no spaces (these can be replaced with a hyphen). This makes for an easily readable URL, and replacing the spaces with a hyphen also helps with Search Engine Optimisation. You can use spaces and punctuation in the Display Name field, and this is what will show as the title of the page on the live site. If you want to change the Name or Display Name of your page in the future, you can do this via Page Properties.

Save and Exit

This button is also used when you are editing a page on your website, and will save the page, then exit out of edit mode so that you can see what the page is going to look like. This is a handy alternative to previewing the page.

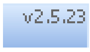
Exit

If you are editing a page, but do not want to keep any of the changes that you have made, you can exit from the page without saving. When you click this button, you will be asked if you are sure you want to exit.



Once you click this button, there is no way to get back the changes that you had made, so please be sure that you do not want to keep any of your changes before you click this button.

Version Number



At the top right hand corner of the toolbar, you will see the current version number. This will look something like 'v 2.5.23'. This shows you the current version of the software that you are running on, and can be used to view the latest release notes on our help website, to see what has changed in the last release (www.cubik.co.uk/release-notes).

Production Manager

This button will show you a list of all the pages that you are currently working on that are in the Saved state (i.e. pages that you have not yet approved or submitted for approval). This lets you quickly link to the page so that you can make any necessary changes and approve the page.

Approval Assistant

If you have the necessary permissions to approve pages on the website, this button will show you a list of all the pages that are currently waiting for your approval. Please note that if you get an email overnight to say that a page is waiting for approval, and it is no longer in your approval assistant, it is possible that someone else has already approved the page.

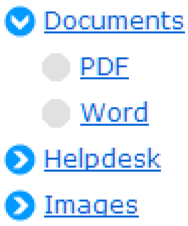
Resource Gallery

This button opens the resource gallery, which allows you to manage the resources that you are using on your site. A resource refers to images, documents, videos or any other files that you embed or link to on your website. A resource gallery is a folder which contains the resources on your site.

Before you can use a resource on a page on your website, you must first upload the resource into a resource gallery. Resource galleries are structured hierarchically, so you can have as many sub-folders as you need. Currently, we need to create resource galleries for you, but Cubik Version 3 (http://www.cubik.co.uk/help/cubik-version-3) will allow you to create your own. If you would like to create a resource structure (this can make things a lot easier for you later on), please send an email to help@cubik.co.uk with your desired structure.

Managing Resources

When you open the Resource Manager, you will see a list of the top level folders.



If a folder has sub-folders, you will see a little blue circle next to the folder. When you click this, the sub-folders will drop down underneath. If a folder has no sub-folders, you will see a grey circle. Clicking on the name of the folder will take you into that folder, so that you can manage the current resources, and upload new ones.

As well as showing you the information about each of the documents (File Type, Size, Name and Description), there are also three options that you can use for each of the documents already in the gallery.

Previewing a resource

Clicking on the thumbnail of the resource will allow you to preview the resource. This is particularly useful for images so you can see what size the image is.

Replacing a resource

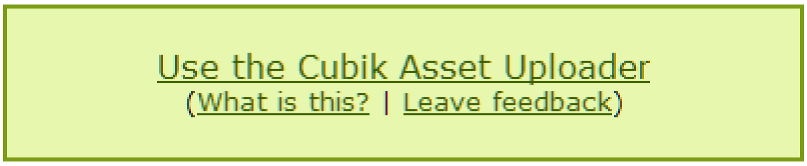
If you have a resource on the website, and you have an updated version (for example a new version of a report, or an event flyer etc.), you can use the replace feature to update the resource. When you a replace a resource on the site, any links to that resource will be automatically updated, so you do not need to remember all the places that the resource is in use. Please note that you can only replace a resource with a file of the same type, i.e. you cannot replace a jpg image with a png image.

Changing resource properties

To change the name or display name of a document, you can use the Properties button. If you change the name of a document, make sure that you leave the file extension on the end, as this is important when you are linking to the document. You can remove the file extension from the Display Name if needed. The *Name* of the document is used for any hyperlinks, so it is best to keep this all lower case with no spaces (use a hyphen instead). The *Display Name* and *Description* are used if you link to the resource from a List of Links, or on other templates such as the Image Gallery.

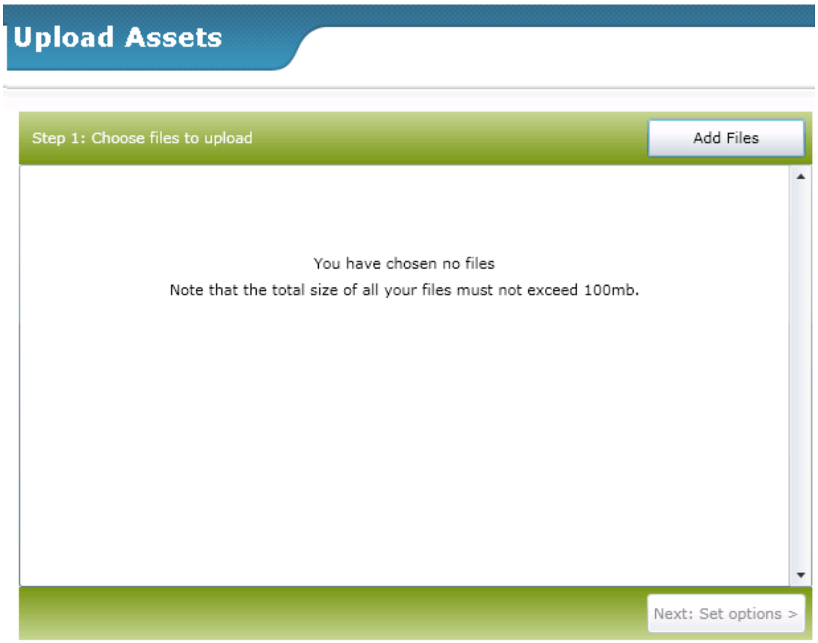
The Asset Uploader

The best way to upload resources to your site is to use the Cubik Asset Uploader. You can get to this by choosing which folder to upload the resources to via the Resource Manager, and then clicking the big green link at the top of the screen.

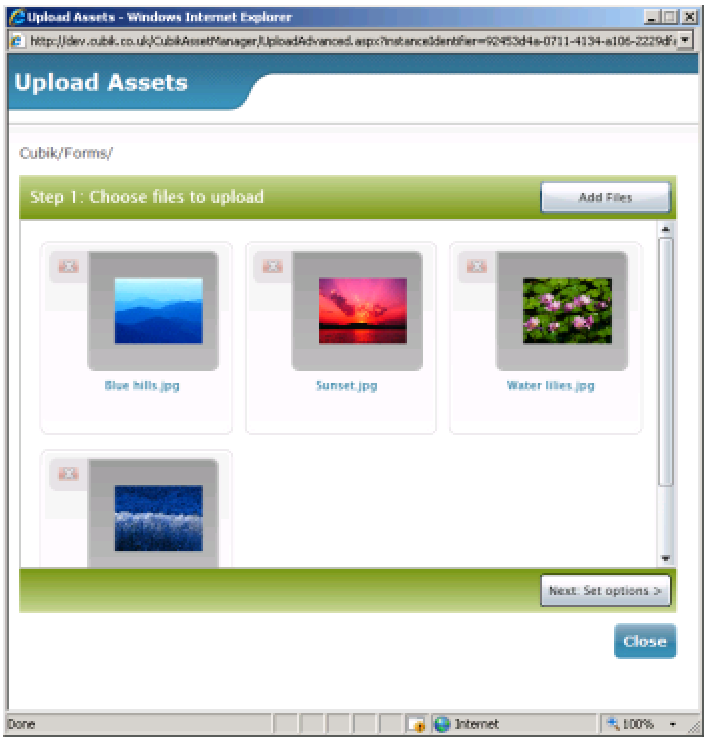


To use the Asset Uploader, you will need to have Microsoft Silverlight installed. If you do not have this, you will see a link on screen prompting you to visit the Microsoft site to download. Silverlight is free, and can be downloaded quickly and easily. Once the download has finished, close down the Asset Uploader window and click the green link again.

Use the 'Add Files' button to select the file(s) you want to upload. The first time you use the Asset Uploader, you will be asked to allow the Asset Uploader to use 100Mb of storage on your computer. It won't actually use all of this space, but it needs it while it is running, so you must agree to this to continue. Once you have clicked Yes to allow access to the storage, you may need to press the 'Add Files' button again.

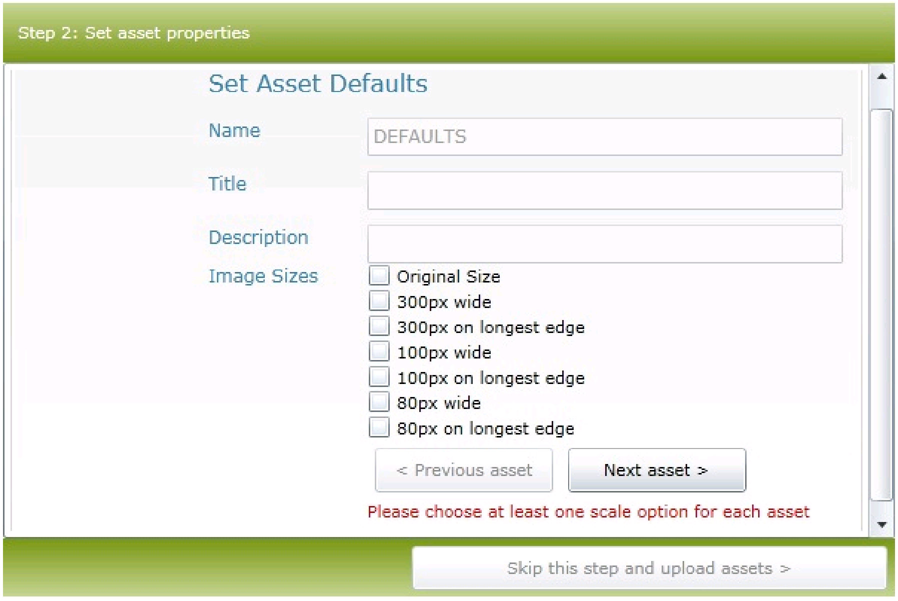


Choose the file(s) you want to upload. To select multiple files, hold down either ctrl or shift and select the files that you want. The file(s) you've chosen are shown in the Asset Uploader. You can use the red cross button to remove any of your selected files. The maximum combined file size for upload is 100Mb. If you are uploading images, you may notice that only some of them are displaying thumbnails. There is a performance overhead associated with creating the thumbnail images, so we only do this if the image is less than 300KB.



Click 'Next – Set Options' to move to the second page. You can add a Name, Title (Display Name) and Description for each file (as described in the *Changing Resource Properties* section above.

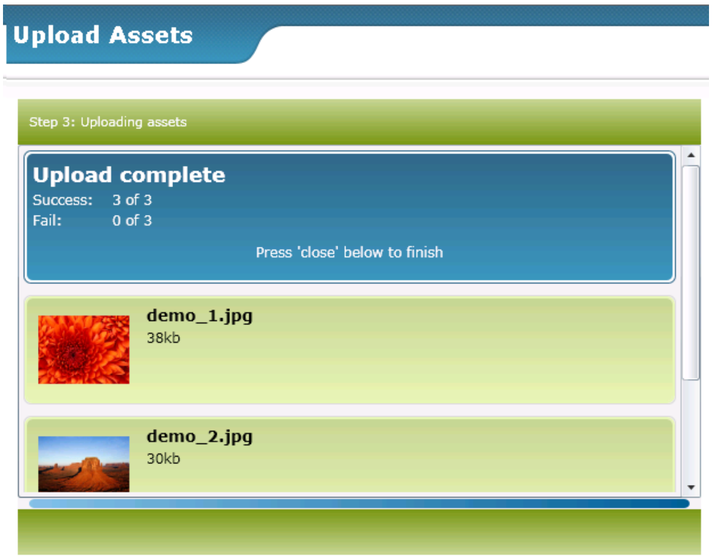
If you are uploading JPG images, the first page that you see is entitled *Set Asset Defaults*. On this page you will see a list of scales that you can choose to upload the images at. What you choose on this page will be applied to all the images that you are uploading (you can change them individually later). If you do not want to resize the images, simply choose 'Original Size'.



If you would like to change the available scales, maybe so that you can add images that are the correct size for your right column, or to fit into the main body content area, we can modify the scales on the asset uploader for you. Just send an email to help@cubik.co.uk and let us know what size you would like to be added. Please note that the scale only works on one side of the image (e.g. 300px wide, 300px length or 300px on the longest edge).

Keep clicking 'Next asset' to move through each file, or use the big 'Skip this step and upload assets >' button to skip straight to uploading your files. Please note that if you are uploading JPG images, you must choose at least one scale option for each image.

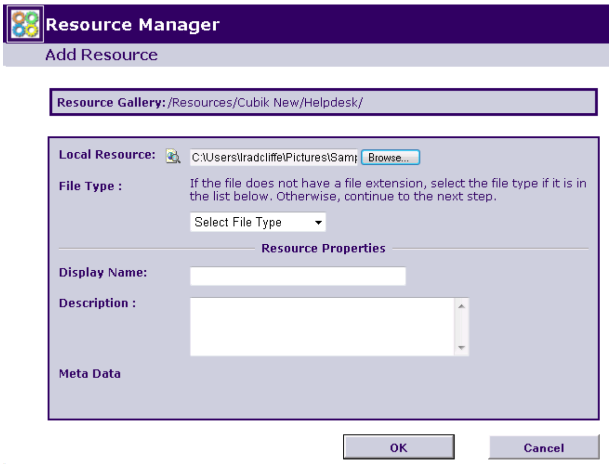
After the last file, the resources will start uploading to the server. Each resource has an individual progress bar, and there is an overall progress bar at the bottom. If the image uploads successfully, it will turn green. If there are any problems, it will turn red. If there are any problems when uploading files, you will see a 'Retry Failed Uploads' button appears at the top of the page.



Once the upload has completed, use the 'Close' button at the bottom to close the Asset Uploader and return to the resource manager.

An alternative method of uploading resources

If you are unable to install Microsoft Silverlight on your computer, or you have problems with the Asset Uploader, there is another method that you can use instead. At the bottom of the resource gallery page, you will see an 'Add New' button. This has a smaller file size limit that the Asset Uploader (about 5MB), and you can only upload one file at a time. When you click the Add New button, you will see a screen appears where you can choose which file you want to upload, and optionally set the Title and Description of the file. Once you are happy with the settings, click the OK button at the bottom and the file will be uploaded. Once the upload is complete, you will be taken back to the Resource Manager.



Deleting Resources

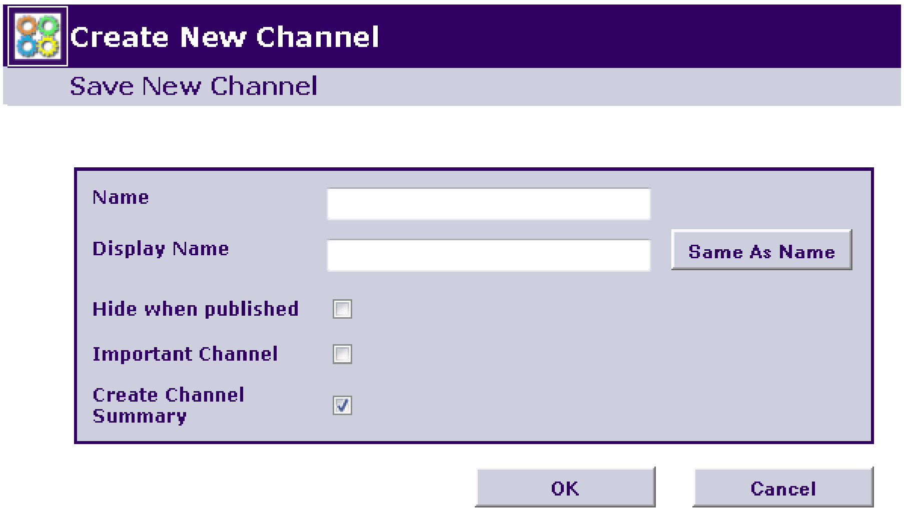
To delete a resource, check the boxes at the left hand side of the screen next to the resources that you would like to delete, and then click the Delete button at the bottom of the page.

Please note that once you have deleted a resource, there is **no way for us to get it back for you**, so please be sure that the resources are no longer needed.

Create New Channel (Section)

A website is structured hierarchically, like the folder structure on your computer. In OneStopCMS, folders are called channels. A channel is a container which can hold other channels and pages, much like a folder on your computer can hold other folders and documents.

To create a new channel on the website, click the Create New Channel button. Not all users may have the permissions level to create new channels and so this button may be greyed out.



Similar to when you save a new page, you will be asked for a Name and Display Name. The Name of the page is used in the URL, e.g. a channel called 'about-us' in the home channel of your site would have the URL 'www.yoursite.com/about-us'. It is best for the Name to be all lower case, and to have no spaces (these can be replaced with a hyphen). This makes for an easily readable URL, and replacing the spaces with a hyphen also helps with Search Engine Optimisation.

When you create a new channel on the website, it will appear on the live site immediately. If you want to hide the channel while you are working on it, you can tick the Hide When Published box. Please note that even though a channel is hidden, it can still be picked up by search engines. If you also want to hide the channel from search engines, please send an email to help@cubik.co.uk with a link to the channel and we will arrange this for you.

The Important Channel checkbox is a customised feature, so you can leave this option unticked, unless you have been instructed that this should be used in your site setup.

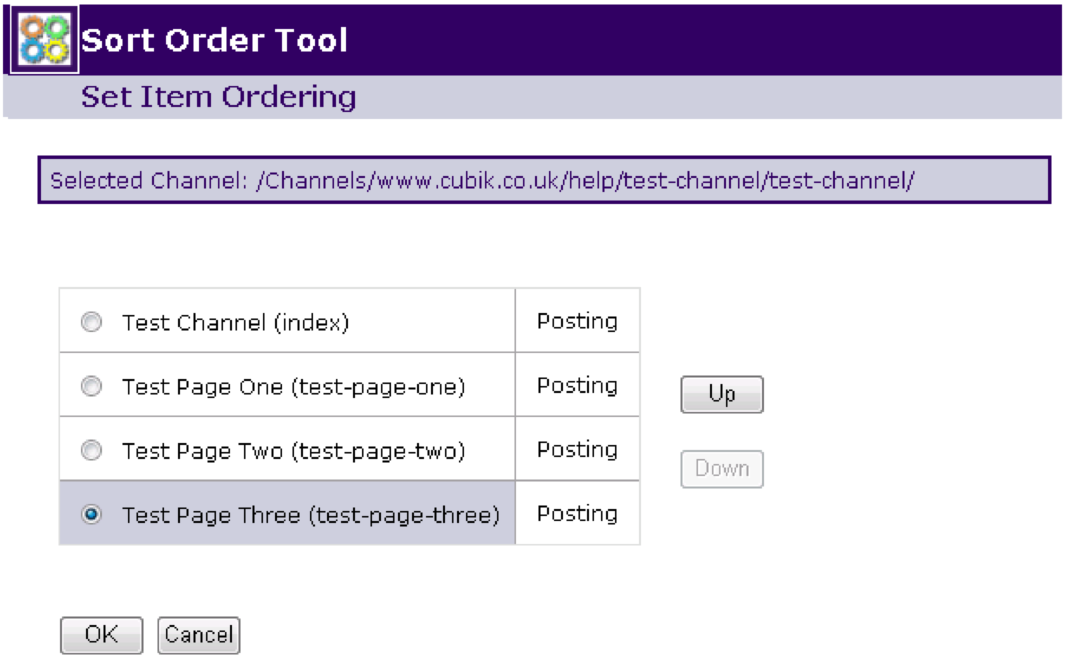
When you create a new channel, a channel summary will be created by default. A channel summary acts like an index page, which lists all of the pages within the current channel. Most of the time, it is best to leave the 'Create Channel Summary' option ticked, but if you do not want a summary, you can untick this box.

Delete Channel

Clicking this button will allow you to delete the current channel. To avoid any accidental deletions, you can only delete a channel that is completely empty (i.e. contains no other pages or channels). If you want to delete a channel and all the pages within it, you can send an email to help@cubik.co.uk and we will delete it for you. Please be aware that once a channel is deleted, there is **no way for us to get it back for you**. If you are unsure about whether you will want the content in the future, you can expire the channel (See: Channel Properties).

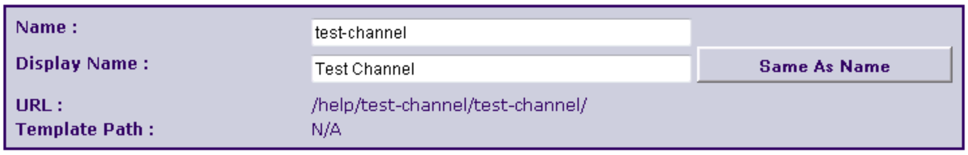
Sort Items in Channel

By default, the items in the navigation are sorted alphabetically by their Display Name. If you would like to change the order of the items, you can click the Sort Items in Channel button. If you have an index page in the channel, this will not display in the navigation, but will appear in the Sort Items list, so make sure that you leave it in place at the top of the list when you are re-ordering the items. If you are re-ordering the items in the home channel, make sure that you leave the home page at the top of the list.



Channel Properties

Clicking Channel Properties lets you change information specific to the channel that you are looking at. At the top of the Channel Properties screen, you will see two boxes to change the Name and Display Name.



You need to make sure that the name of the channel does not contain any spaces. Changing the Display Name of the channel will not change the Display Name of index page within the channel, you will need to do this separately within Page Properties.

There are two tabs within Channel Properties, Standard and Custom.

Standard

The first box is the Description box. The description of the channel will not display on the actual channel, but will appear on any summary pages that are being linked to. Adding descriptions to all channels and pages is good for search engine optimisation, so it is good practice to make sure you always put this in.

The next two options that you have are for the Start and Stop Publishing dates. If you want the channel to appear on the website after a certain date, or to be removed from the website at a certain date, you can do this by setting the start and stop publishing dates. The channel will still be visible when you are signed in have Edit this Site ticked, but will only be visible on the live site between the start and stop publishing dates.

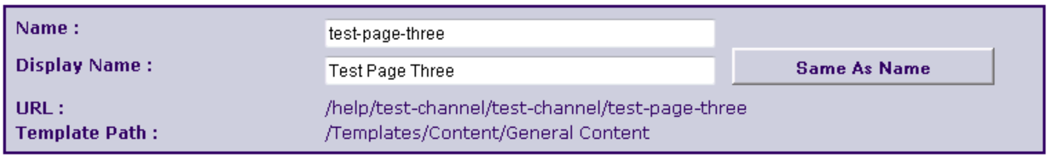
At the bottom of the page, you have two further options. *Important Channel* is a customised option, so you can ignore this unless you have been told about this in your site setup. You can also choose to hide the page from public view, so that you can add a link to it without it appearing in the navigation. When a channel is hidden, it can still be seen by search engines. If you want to hide a channel from search engines, please send an email to help@cubik.co.uk with a link to the channel.

Custom

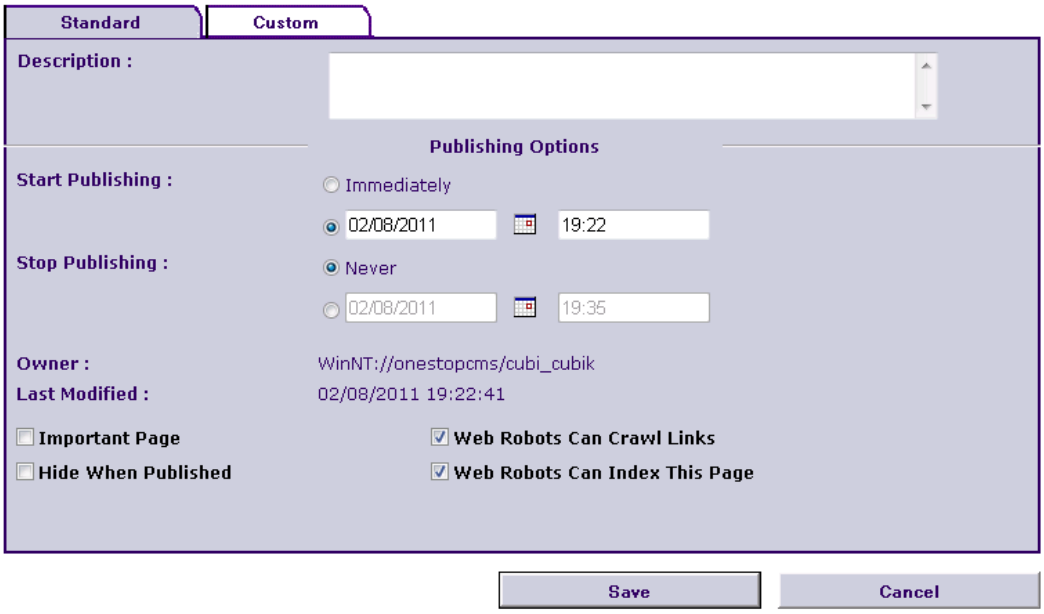
The Custom Properties tab will usually be empty, unless there are specific properties already defined for the channel (e.g. Meta Data or Comments). Channel Properties need to be set up by Cubik, and you will usually not need to alter them yourself.

Page Properties

Clicking Page Properties allows you to change the properties of the current page. This screen works very similarly to the Channel Properties screen, but contains more options. The first two options are for the Name and Display Name of the channel. You need to make sure that the name is all lower case, and any spaces are replaced with a hyphen.



Standard



The first box on the Standard tab is for the description of the page. This is displayed on the page underneath the page title, and will also appear anywhere that you link to the page (e.g. in a Link List or a Channel Summary). Page Descriptions are very important for Search Engine Optimisation, so it is good practice to make sure that all pages have a description that relates to the content that is on the page.

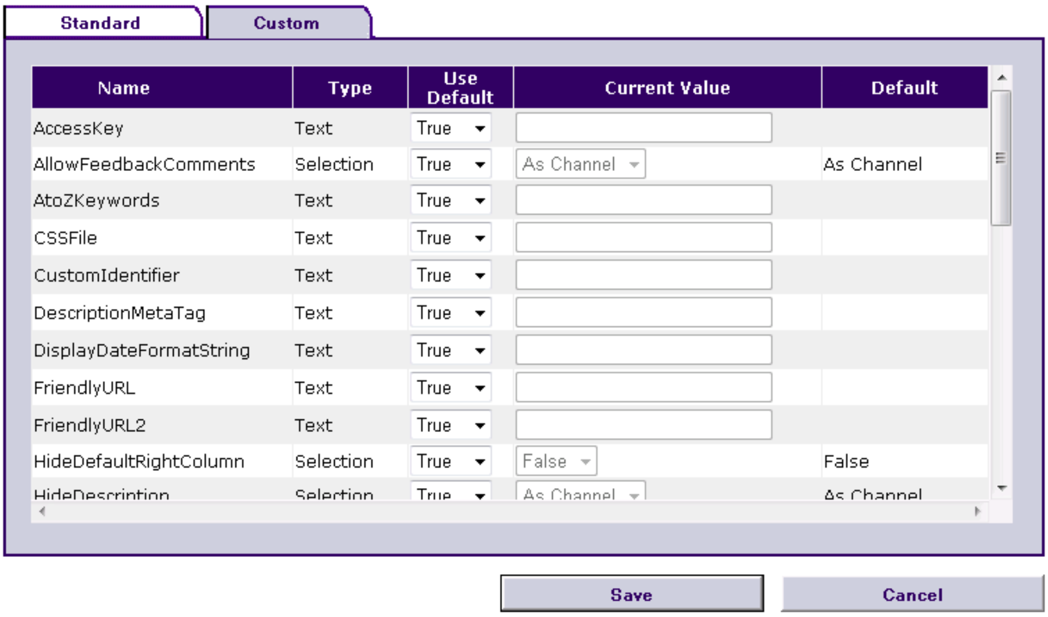
The next two options that you have are for the Start and Stop Publishing dates. If you want the page to appear on the website after a certain date, or to be removed from the website at a certain date, you can do this by setting the start and stop publishing dates. The page will still be visible when you have Edit this Site ticked, but will only be visible on the site between the start and stop publishing dates.

At the bottom of the page, you have four options. *Important Page* can be used in conjunction with the Channel Summary template. A Channel Summary can be set up so that Important Pages display above all others in the list, regardless of what sorting option has been used. You can use this if you have an important event or news item which you want to stay at the top of the page.

You can choose to hide the page from public view, so that you can add a link to it without it appearing in the navigation. When a page is hidden, it can still be seen by search engines. The two options at the bottom right of the Standard tab allow you to hide the page from search engines. By default, the boxes are ticked and the page can be seen, so you can hide the pages by unticking the two boxes.

Custom

The Custom tab in Page Properties contains a lot of options which can control how the page displays and other behaviour relating to the page. As the functionality of page templates is shared across all sites, you will notice that there are a lot of options which you probably do not need to use.



A description of the most commonly used Custom Properties is given below. To set the value of a custom property, you first need to change the *Use Default* dropdown to False. You will then be able to change the value in the next column.

AllowFeedbackComments

Setting this custom property to True will give your site visitors the ability to add a comment to the current page. If you have not used Page Comments before, there is some configuration that we need to change for you, so please send an email to help@cubik.co.uk.

FriendlyURL and FriendlyURL2

These two fields allow you to set custom URLs for pages on your website. This can be useful if your page is buried very deep in the site (and therefore has a long URL), and you want a short

URL that is easily remembered. Simply type the required URL in the box. You do not need to add the 'http://', but you do need to add the site URL (e.g. www.cubik.co.uk/release-notes).

After you have added the Friendly URL, you will need to approve the page in order for the URL to become active. The URL will also need to be pointing at your server (see www.cubik.co.uk/dns), so you cannot point the URL from a different site to your website without first making the necessary DNS changes. When you visit Friendly URL, you will be redirected to the correct page on the website.

HideDescription

If you want to add a description to the page but you do not want it to appear on the page itself, you can set this option to True. The description will still appear on any pages where you link to this page (unless you hide it using the settings on that page).

RequiresSSL

Setting this option to True indicates that when this page is viewed, it will be viewed over a secure connection. This is useful for web forms where you might be collecting sensitive data, so you can ensure that the page is secured.

Further information on the available Custom Properties can be found on our help website: www.cubik.co.uk/custom-properties

Revision History/Restore a Previous Version

If you make a change to a page but you want to view a page as it used to look, you can use these options. You also have the option to revert back to a previous version. A 'version' of the page is created every time that you approve the page (saving a page does not create a version). When you revert back to a previous version, you will need to approve the change. When you approve the change, another version will be created, and all the previous versions will still be available.

Help

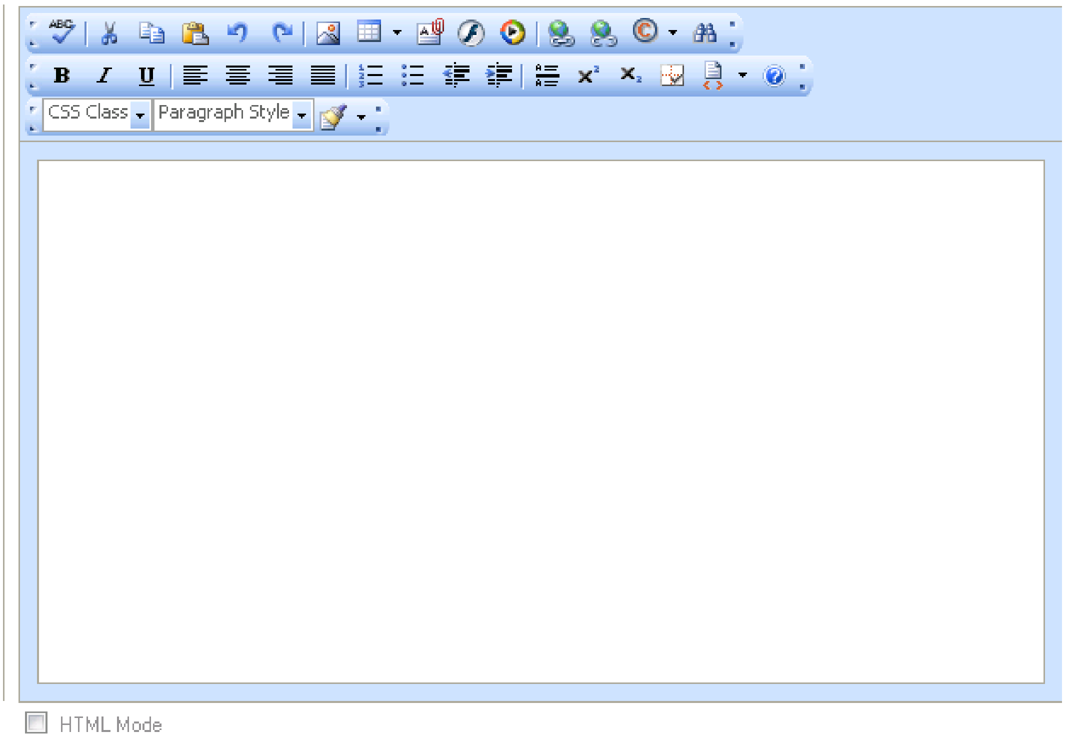
This button gives you a direct link through to our help website, and shows you links for finding information on our site, or for reporting a problem to us. The links on this pop-up will open in a new window, so you do not need to worry about being taken away from your website.

Creating a General Content page

Most of the pages that you create on your website will be built from the General Content template. To create a new General Content page, click Create New Page, then choose Content, then General Content.

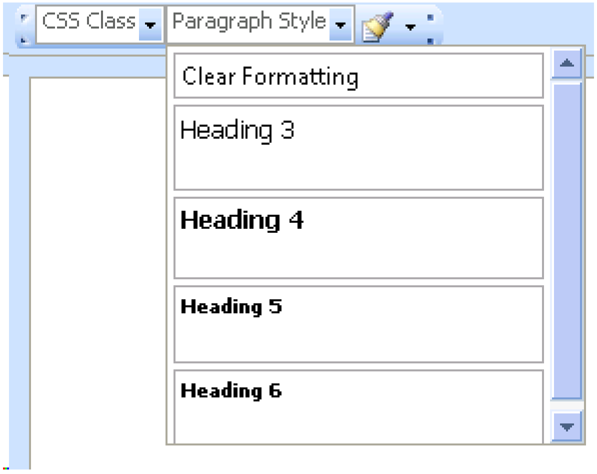
This template will be customised depending on the design of your site, but will usually feature the same basic placeholders. Any advanced placeholders will be explained to you in your training, and you can contact us if you need any further help.

Page Body Content



The Page Body Content area on a general content page is used for adding the majority of the text for the page. You can also use this placeholder to insert images, links and videos.

Headings

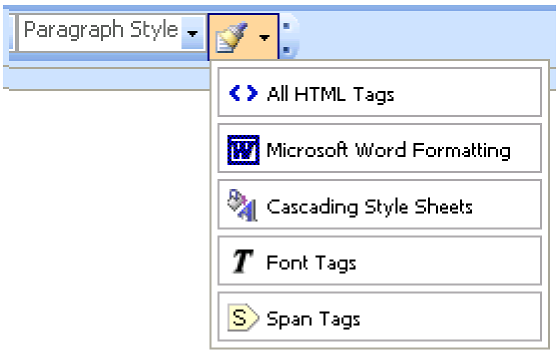


When you add content into a page, you can use the different heading styles to add extra formatting to the page, and to break up the text into smaller sections. On the third row of the toolbar is a dropdown menu for Paragraph Style, which lists the different heading styles available to you. You will notice that the list starts at Heading 3 and not Heading 1. This is because Heading 1 and 2 are reserved for the Page Title and Description (which are added in Page Properties).

The heading styles on your website need to be added in order, which means that you must have a Heading 3 on the page before you can use a Heading 4. If you try to save a page with the headings in the wrong order, the system will re-arrange the headings into the correct order. If you already have a Heading 3, and 4, you can use further Heading 3s further down the page.

Format Stripper

If you copy some content across from a document or an email, you may sometimes find that you have problems with the formatting of the page. This is because some formatting tags can be copied across with the content. To remove these tags, you can use the Format stripper, which is next to the Paragraph Style option on the toolbar.



The most common options to use on the Format Stripper are Microsoft Word Formatting, Font Tags and Span Tags. Before you click these options, you need to make sure that you have no text selected, as these options apply to all the text within the box. When you choose one of these options, you will see that the text returns to plain formatting, in line with the site styling.

Images

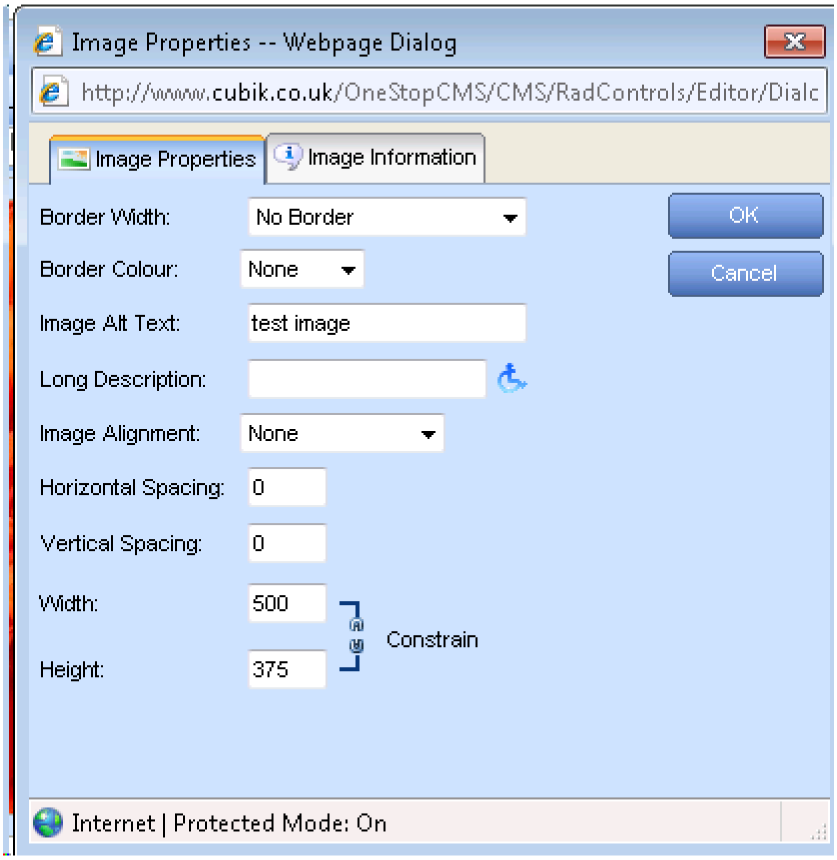
To insert an image into a page, you first need to have the image uploaded into the Resource Manager (See: Asset Uploader). Once the image has been uploaded, you can use the Image Manager to insert the image:

This button is half way along the first row of the toolbar, and when clicked will open a pop up window. If a window does not open, you need to make sure that you do not have a pop up blocker enabled.

When you click the Image Manager, you will see a screen similar to the image above. Down the left hand side of the page is a list of the resource folders, which you can expand by clicking on the blue circles. Clicking on the name of a folder will show you a list of the available images at the right hand side of the page. You can choose the image you want to insert by clicking on the image.

When you have selected the image, you will be shown a larger view of the image, so you can make sure you have chosen the correct one. You need to insert at least 2 words of alternative text, and you can then choose to insert the image. Alternative Text is important for visitors that cannot see images, e.g. those that are using a Screen Reader. You need to make sure that the alternative text explains what the image is showing. If you do not enter at least two words of alternative text, you will not be able to save the page.

When you insert an image into the page, you can right click on the image and click Set Image Properties to change further details of the image, e.g. the size and the alignment:



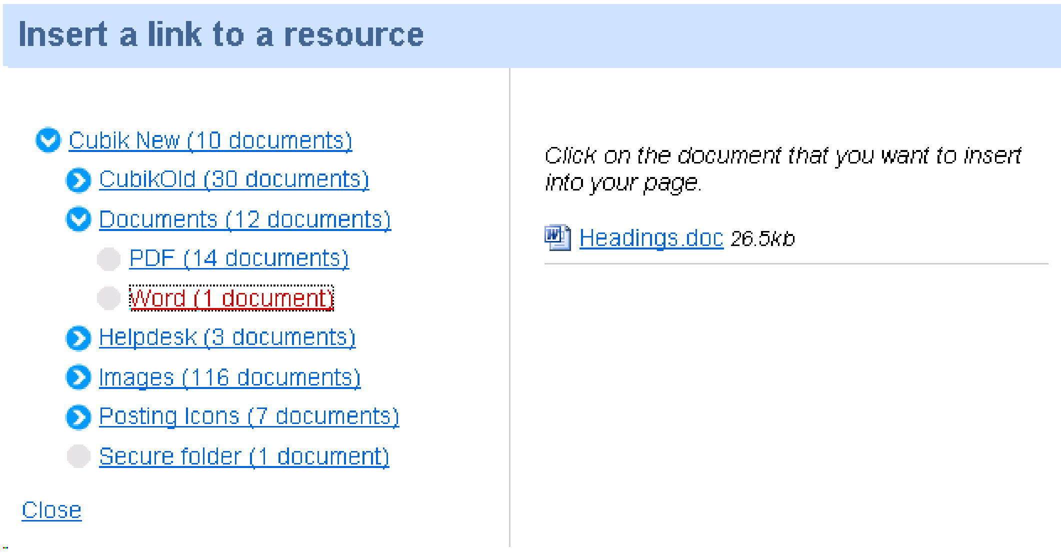
To make the text wrap around the side of the image, you can choose either Left or Right from the Image Alignment option, depending on which side of the image you would like the text to appear. If the text appears too close to the image, you can use the Horizontal and Vertical spacing options to add extra space between the image and the text.

To change the size of the image, first click the Constrain link, and then change either the width or height options. When you change one of the boxes, you will see that the other changes in proportion. If you find that you are consistently resizing images using Image Properties, you can ask us to set up a new scale option on the Asset Uploader, so that the image will be resized automatically when it is uploaded.

Documents

To insert a link to a document, you first need to upload the document into the resource gallery (See: Asset Uploader). The Document Manager button is on the top row of the toolbar, to the right of the Image Manager.

You need to highlight the text that you want to make into a link, and then click the Document Manager button. When this button is clicked, the Insert Document screen will open a pop up window. If a window does not open, you need to make sure that you do not have a pop up blocker enabled.

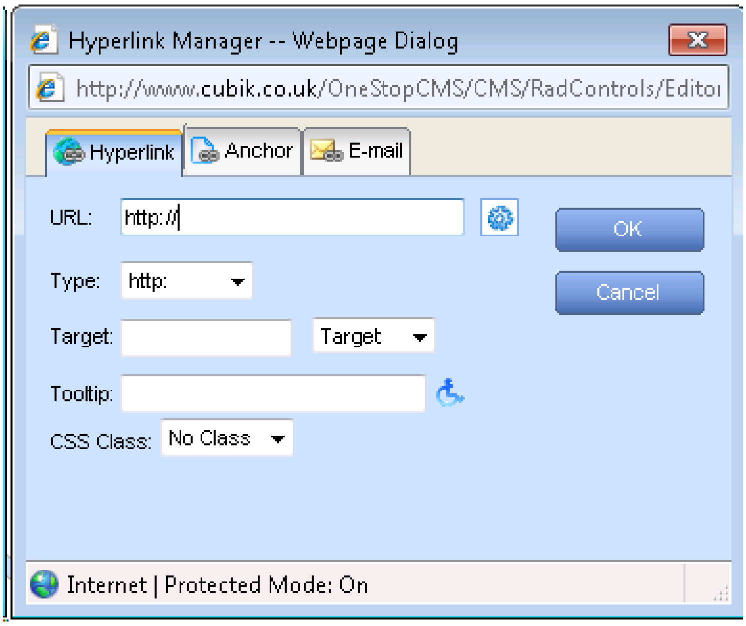


When you click the Document Manager, a screen will appear like the image above. Down the left hand side of the page is a list of the resource folders, which you can expand by clicking on the blue circles. Clicking on the name of a folder will show you a list of the available documents at the right hand side of the page. You can choose the document that you want to link to by clicking on the name of the document. You will be given the option to change the text of the link, and you can then insert the link.

Links

To insert a link in your page, you first need to highlight the text that you want to add the link to, and then click the Hyperlink Manager.

There are two different kinds of links that you can insert into your pages, links to external websites, and links to other pages on your website.



To link to an external website, simply type the URL into the URL box. If you want to link to a page on your website, you can use the browse button to the right hand side of the URL box. This will show you a tree of all the channels on your website, so you can choose which page to link to.

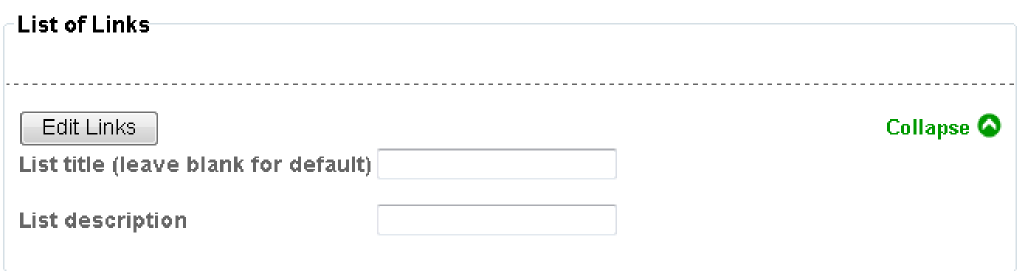
If you want the link to be opened in a new window, choose '_blank' from the Target dropdown. If you want the link to open in the same window, leave this option blank.

It is important to add a tooltip to your links to give a brief description of the page or website that you are linking to. This is useful for visitors with visual impairments, to give them more information about what they will see when they click on the link.

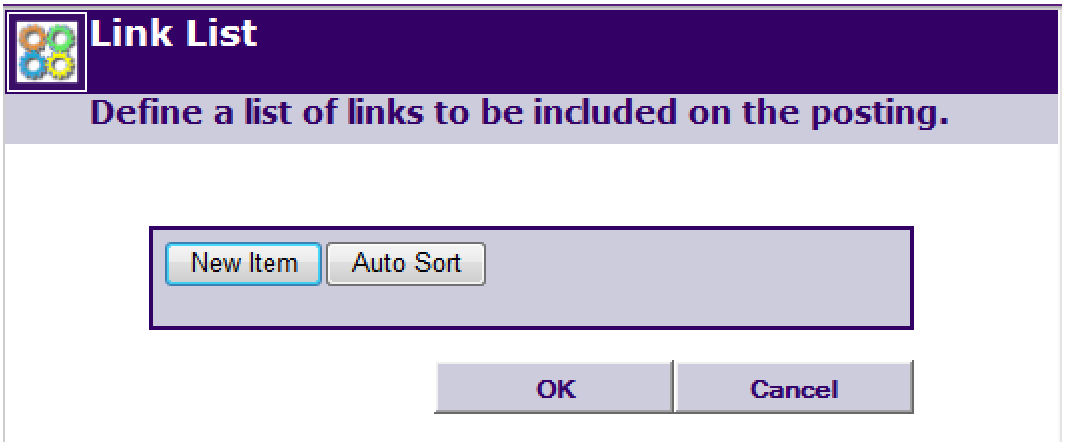
When you have finished filling in these fields, click the OK button and the link will be inserted into the page.

List of Links

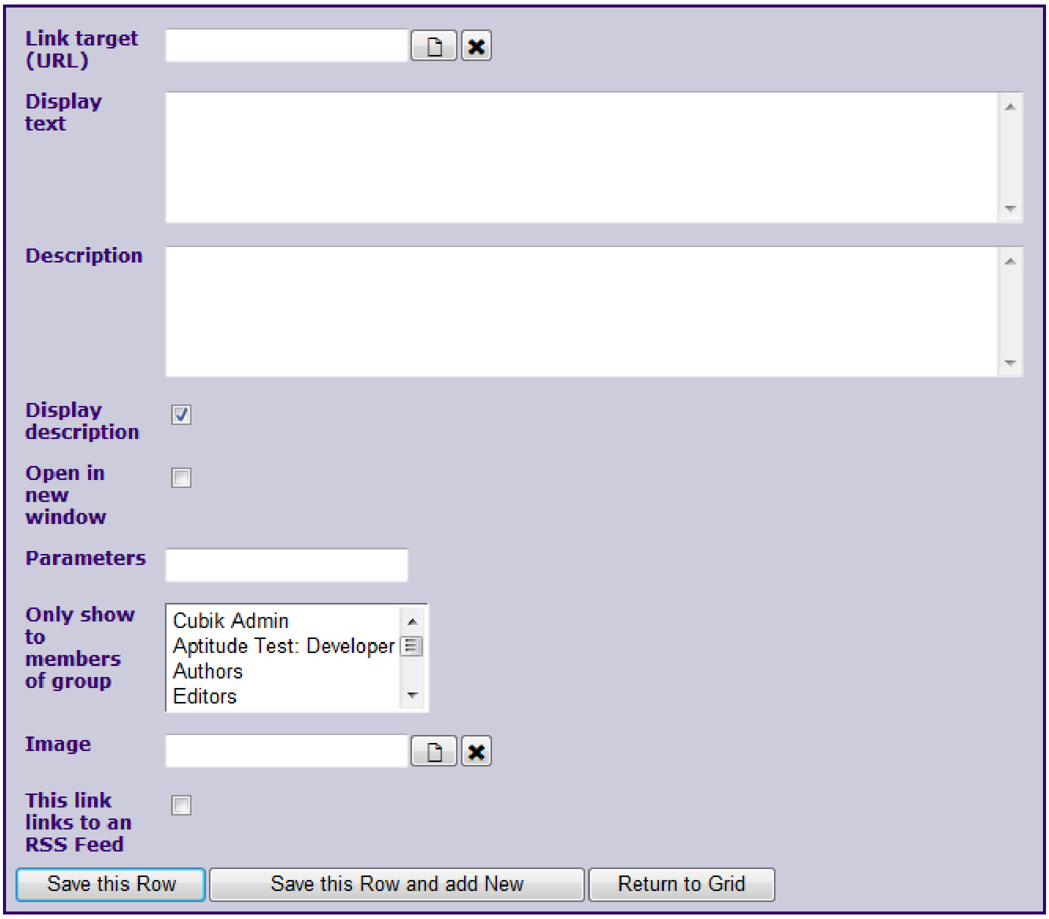
The list of links placeholder is useful if you have a lot of links to be added to the page. The placeholder will have been styled to add the links in a formatted list, usually at the bottom of the page or at the right hand side.



To start adding links to this placeholder, click the Edit Links button. This will bring up a new screen which allows you to define the links that you want to display. You can use this placeholder for internal and external links, as well as links to documents.



To insert a link, click the *New Item* button at the bottom of the page. This will bring up a screen with a number of fields which allow you to define the link and how it will display.



Link Target
If you are linking to an external website, simply type the URL into this box, making sure to include the 'http://' at the start of the URL. To link to a document or a page on your website, click the browse button next to the box and navigate for the item that you want to link to. By default, the screen will show a list of channels and pages, you can click the 'Radio Buttons' option at the top if you want to link to a document.

Display Text
This is the text of the link that people will click on, so should ideally be a brief description of where the link will be going. This is the equivalent of highlighting the text when using the Hyperlink Manager in the Page Body Content area.

If you are linking to an internal page or a document, you can leave this option blank to use the display name of the document/page as the display text of the link.

Description
This is some additional text to display on the page to describe what the link is to. Depending on the styling of your site, this may display as a tooltip or as a description underneath the link.

If you are linking to an internal page or a document, you can leave this option blank to use the description of the document/page as the description of the link.

Display Description
If you are linking to an internal page or document, the description will be pulled through automatically. If you do not want a description to appear on this link, simply untick this box.

Open in New Window
If you want the link to open in a new window when clicked on, tick this box. This is the equivalent of using *_blank* as the target when using the Hyperlink Manager in the Page Body Content area.

Parameters
This option can be left blank unless you have been advised to use it in your site setup. The option is usually used for styling links differently, so is custom to your site.

Only Show to Members of Group
This option is used if you want the link to only display to members of certain groups. For example, you may have a link to a specific deal in the shop, which you only want to show to members of the 'Full Members' group. You can click on the names of the groups in here to decide which groups to show the link to (hold down the *ctrl* key to select more than one group, and hold down *ctrl* and click again to deselect a group). If you want the link to show to everybody, do not select anything for this option.

Image

Depending on the styling of your site, you may be able to display a thumbnail image next to each of the images in the list of links. The image will need to be stored at the correct size in the resource manager, as you will not have the option here to decide what size to show it at. If you are linking to a page on your website, the Page Link Icon will be pulled through automatically.

This link links to an RSS Feed

This option is used if you want to display an RSS feed from another site on a page on your website. Simply place the RSS URL into the Link Target box and tick this option. When the page is saved and approved, the links list will automatically be populated with every item from the RSS feed, and will automatically update each time that the RSS feed is updated.

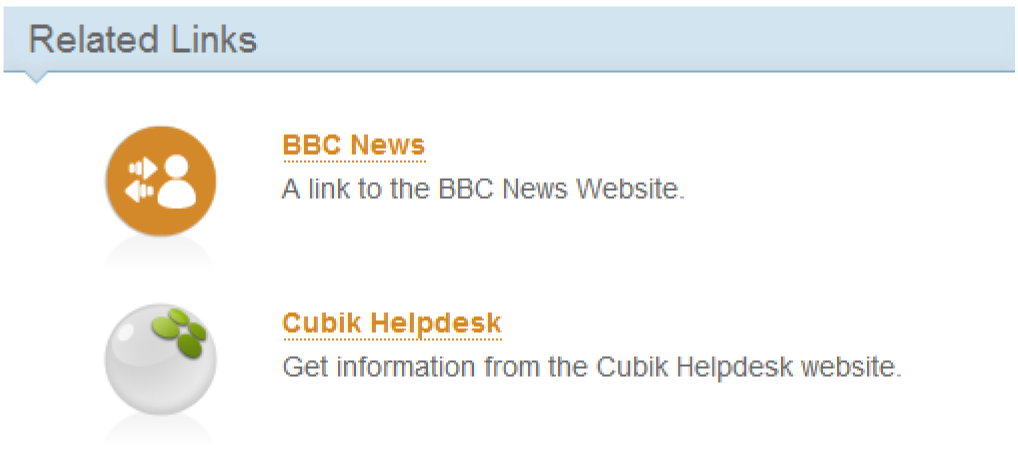
When you have finished adding your link, you can either click *Save this Row* or *Save this row and add new* (depending on if you want to add more than one link).

You can use the up and down arrows to reorganise the links into the correct order, and clicking the Insert button on a row will insert a new link above that row (useful for adding a link to the top of the list).

When you are happy with the ordering, click the OK button at the bottom right of the page and the pop up window will close, and your page will refresh with the links in.

List Title and Description

Your site will have been set up with a default heading to add above the List of Links placeholder (e.g. Related Links), so if you want to change this heading, you can use the List Title option. The List Description option is used for some text that will display underneath the heading, to give your visitors some more information about the links.



Poll

If you have polls enabled on your site, you will see on your general content pages (and on other templates if this is part of your site design), you have a placeholder called Poll. This has three options:

In the first option, you can define a heading for the poll, for example you may want to call it Poll of the Week, to let your visitors know that the poll will be updated on a weekly basis. You can leave this option blank if you do not wish to have a heading.

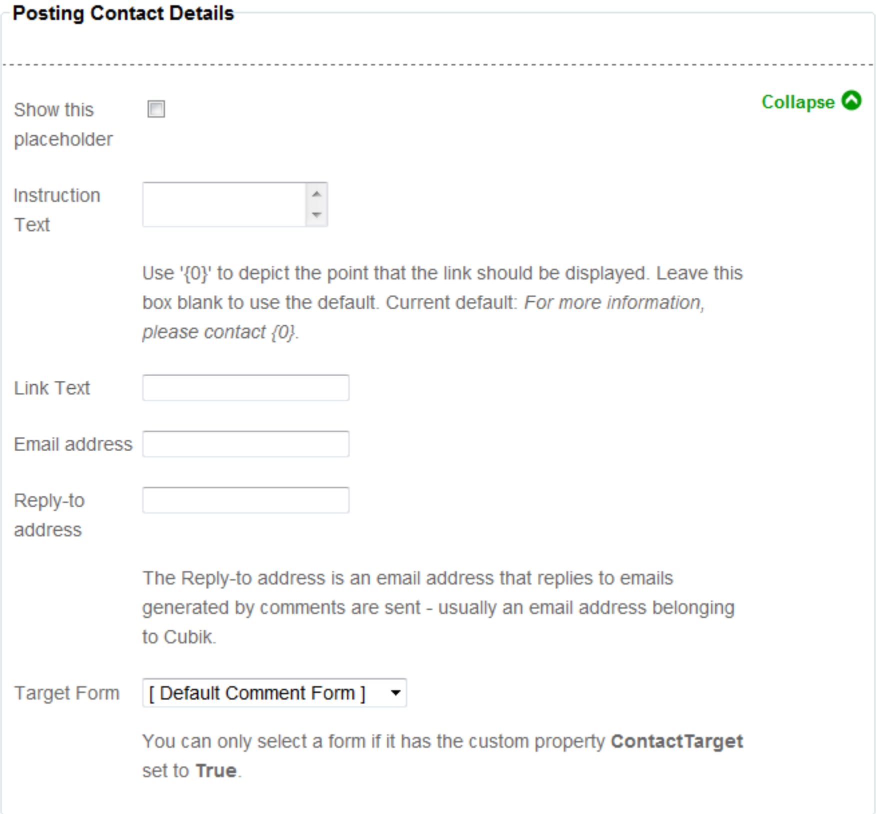
If you have entered a heading, you can choose what style you want this to be displayed in. The default style will be Heading 3, but if you want it to be smaller, you can choose a different heading style.

The last option is for you to choose which poll you want to display. This dropdown menu will show a list of all the polls that you have created in the Poll Maintenance area of the Control Panel. You can only have one poll on each page, but you can have the same poll on multiple pages. If you do this, the results for the poll will still be stored in one place, so it will not matter which page the visitor votes on.

If the visitor is signed into the site and they vote on the poll, the vote will be registered against their user account so they cannot vote more than once on the same poll. However, it is important to note that you cannot see the individual votes for each visitor. If a visitor is not signed into the site, it will be recorded in a cookie on their computer that they have voted on the poll, to try and prevent them from voting multiple times. However, this can be circumvented if the visitor clears their cookies.

Posting Contact Details

This placeholder allows you to give your visitors a link on each page that they can use to contact you, without giving away your email address. This is usually styled to appear at the bottom of your page, but could also appear at the top, or in the right column.



Show this placeholder
Tick this box to add the contact link to your page.

Instruction Text
Use this box to add the surrounding text of the link. The Link Text will be defined separately, so use '{0}' to define where you want the link to display. E.g. *Please contact {0} for more information.*

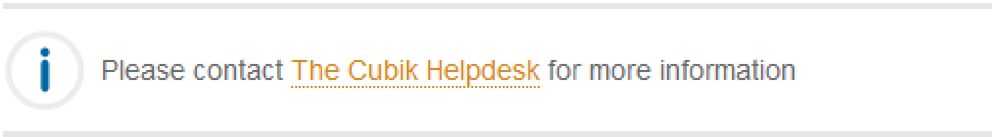
Link Text
This is the text of the link, and is usually the name of a person or a department, e.g. *The Cubik Helpdesk*

Email Address
This is the email address that you would like the queries to be sent to. This email address will never be displayed on the page.

Reply-to address
When the visitor fills in the contact form, an email will be generated from our system with their details, and sent to the email address you have just defined. If you accidentally reply to this email instead of responding to the visitor, the email will be sent to our system, and will not be seen. It is best to add your email address in here, so you will notice if this happens.

Target Form
If you do not like the standard contact form, you can build your own form to use instead. Simply set the *ContactTarget* custom property to True on your form, and it will appear in this dropdown field for you to use.

When you have filled in all these fields, the link will appear on the page like this:

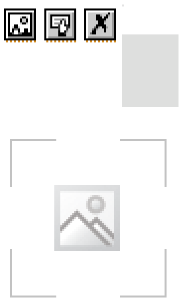


When the link is clicked, it will bring up a form like this (if you use our standard form):

When the form is submitted, you will receive an email containing the submitted information, and there will be a link back to the page so that you can trace where the user clicked the link from.

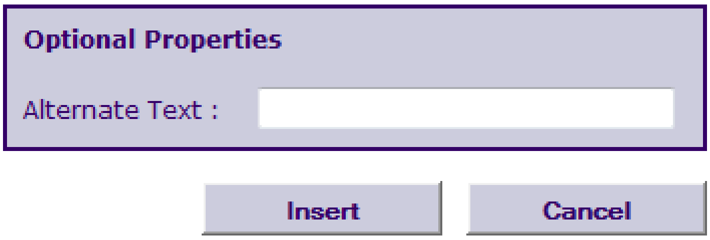
Page Link Icon

This placeholder is used to define a thumbnail image which will display on any pages that link to this page (e.g. in a List of Links or a Channel Summary). The image will not be seen on this page, just on pages that link to it.



To add an image, click the first button. This will bring up a tree of resource folders, similar to the Resource Manager, which you can use to find the image that you want to use. The image will need to be the correct size before you insert it into this placeholder, as there are no options for re-sizing. Click on the name of the folder that contains the image you want to use, and then click the Select button next to the correct image.

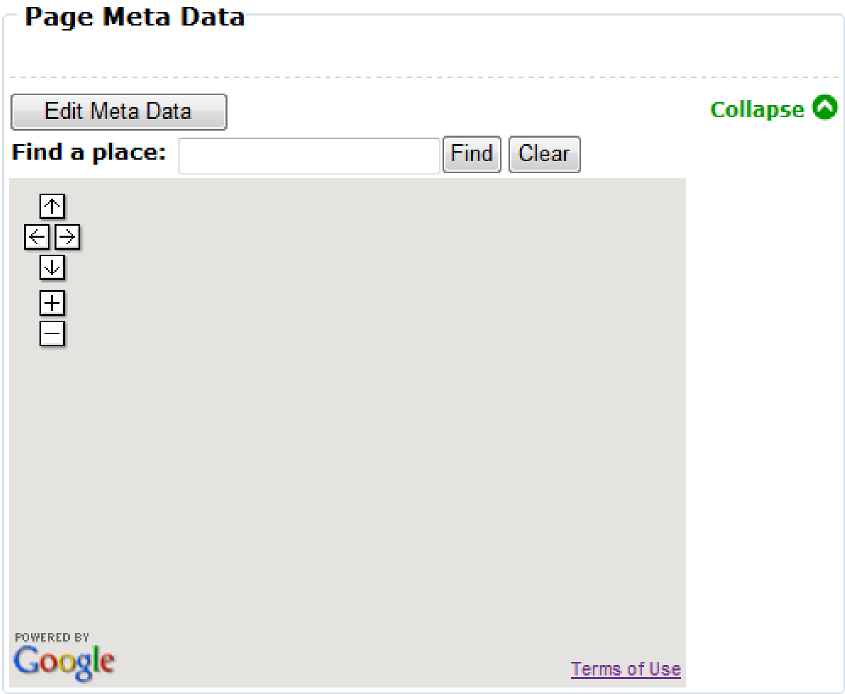
When you have chosen the image, you will need to insert at least two words of alternative text to describe the image, and then you can click Insert. If you do not enter at least two words, you will be unable to save the page.



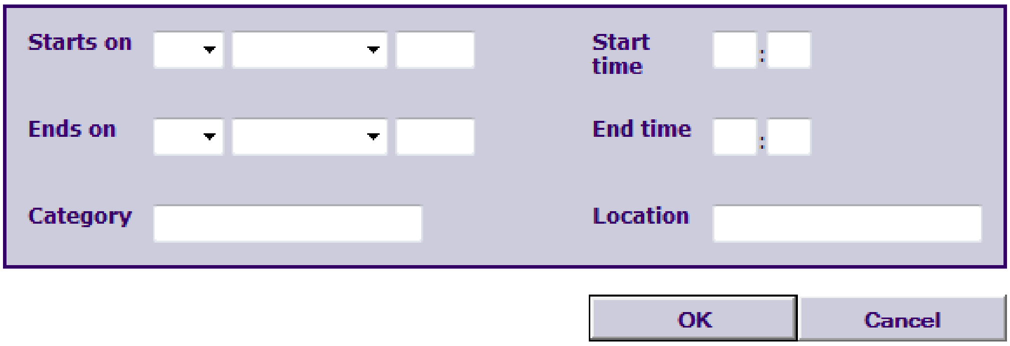
When the link is used in a List of Links or a Channel Summary, the image will be displayed next to the link, like this:

Page Meta Data

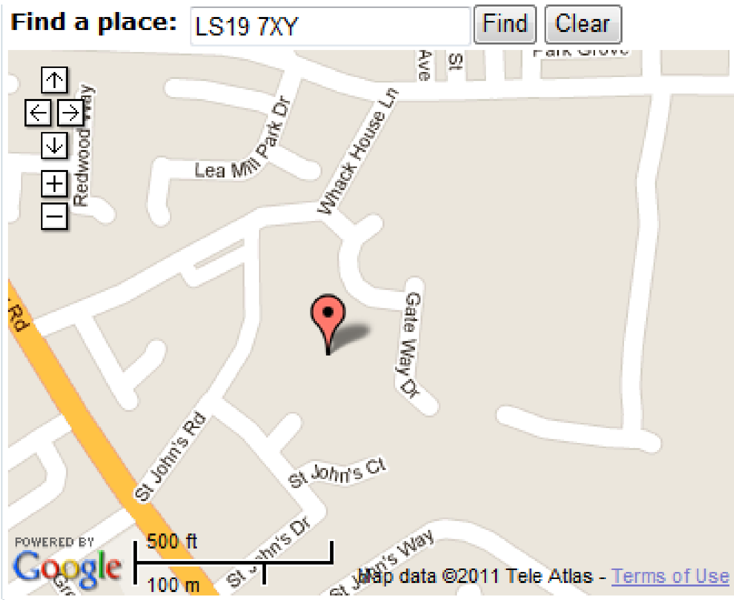
Depending on the setup of your site, you may have a Page Meta Data placeholder on your general content pages. This is most often used for Events, so that you can add your events to a calendar, but can also be used for location searches, advanced searches and for page filtering. The example that we are using is for Events Meta Data with a Google Map.



To enter the meta data details, click the Edit Meta Data button. This will bring up a screen similar to this (the fields will differ depending on the setup of your site).



Once you have filled in all the relevant information, click the OK button. If you would like to add a Google Map to the page (and you have this option enabled), type the postcode or location into the 'Find a Place' box and click Find. If the marker is not in exactly the right place, you can click and drag on it to put it in the correct place.



When the Google map shows on the page, it will be fully interactive, allowing your visitors to move around and zoom in and out. It will also give them the option to get directions to the location.

Creating a Web Form

The web form template can be used for many purposes, e.g. Contact pages, event bookings, donations. For this reason, this is the template that has the most options, so it can look quite daunting at first. For basic forms, you can leave most of the options at the default setting, and tweak the advanced settings as needed. This section of the help guide will explain all the options on the template, to help you to decide which options to use.

To create a new Web Form, click Create New Page, then choose Content, then Web Form (this option may be on the second page of templates depending on your site).

Page Body Content

This area is the same as the Page Body Content placeholder on the General Content template, and can be used to give your visitors an introduction to the form, and give them any instructions they may need before filling in the form. In the same way as the General Content template, you can add images and links into this placeholder.

Form Configuration

This section of the template is the longest section which contains all the configuration options. The configuration has been split into multiple sections, to help you find the options that you need.

Allow form to be submitted

This option should be yes in almost all instances. If you want to temporarily stop people from filling in the form, (e.g. if an event has sold out), you can change this option to No.

Text of the Submit Button

By default this option is set to 'Submit'. If you would like the submit button to say something different (e.g. 'Submit your query' or 'Proceed to payment'), you can type it in here.

Record IP address of user submitting the form

If you would like to record the IP address of the visitor when they submit the form, you can tick this box. Please note that if you tick the box, you **must** add some text to the form so that your visitors are aware that their IP address is being recorded.

Allow users to save details for later submission

If you select 'Yes', a user who is signed in will be able to save values in the form for a later date. Once the user is happy that the form contains the values he or she needs, the form can be submitted. This option will only be available for users that are signed in to the site, and is most useful if you have a very long form (like a job application form).

Saved for later message

If a user saves the form for later, the message that you enter in this box will be displayed to the user once the form is saved. The default for this option is *'Your form has been saved. When you next return to this page, the form will be pre-populated with the values you have entered so far, ready for you to edit, complete, and submit.'*.

Returning to saved form message

If a user saves the form for later, the message that you enter in this box will be displayed to the user when he or she returns to the saved form. The default for this option is *'You previously saved this form. It is pre-populated with your values, ready for you to edit, complete, and submit.'*.

Pre-populate form with previous submission?

If you select 'Yes', a user who is signed in will see the form pre-populated with the data from a previous submission, ready to edit and submit again.

Single submission only

If you tick this box, each visitor will only be able to submit this form once. This is tracked by a cookie on the visitor's PC, so can be circumvented. However, if the visitor is signed into your site, this will also be remembered against the visitor's user account. If you want to use this option, it is best to set it after you have finished testing the form, as admin users are not exempt from this option.

Display form after submission?
If you select 'Yes' the form will remain on screen after it has been submitted, instead of displaying the standard Post Submission Text.

Custom Form Script
Please enter the filename of the custom script file this form page should reference (e.g. 'MyScript.js'). You will only need to use this option if you have been told about it during the setup of your site.

User Profiles

These options are used for creation and manipulation of user accounts, along with restricting who can fill in this form.

Update user profile with submitted values
If you choose "Yes", any form fields that you have chosen to pre-populate with the current user's details will be written back into the user's profile, meaning that this form can be used to administer the current user's account. This option should be set to Yes for any payment forms.

Require user sign in
If you choose "Yes", only users who have signed into your site will be able to submit this form.

Sign in type
If you choose "Yes" to *Require user sign in*, you can choose what the user sees here. The available options are:
1. *Sign in link:* This hides the form and displays a link which the user can use to sign in.
2. *Sign in link and disabled form*: As in 1, but the form stays on screen with the fields disabled.
3. *Login controls:* The form will be hidden, and a username and password box will appear on screen so the user can sign in without leaving the page.
4. *Login controls and disabled form:* As in 3, but the form stays on screen with the fields disabled.
5. *Login and register controls:* As in 3, but a register link will also appear on screen to allow the user to register if they do not have a user account.
6. *Login, register controls and disabled form*: As in 4, but a register link will also appear on screen to allow the user to register if they do not have a user account.

Require no user
If you choose "Yes", only visitors who have *not* signed into your site will be able to submit this form.

Create user profile with submitted values
If you choose "Yes", any form fields that you have chosen to pre-populate with the current user's details will be used to create a new user account, should there not be a currently signed in user. This will only work if you include the user's email address on your form. You can also include items with names of *'username'* and *'password'* to allow the user to choose a username and password. This option needs to be set to Yes for any payment forms.

Sign in new user and redirect to return url
If you choose "Yes", the new user will be signed into the site and redirected to the page indicated in the return url query string parameter. This means that you can set up a form and link to it with a 'ReturnURL' parameter on the query string (e.g. www.yoursite.com/test-form?ReturnURL=/thankyou-for-registering). When the user has filled in the form, they will be automatically signed in to the site, and taken to the Thank you for registering page.

Do not activate user until payment has been completed
If you choose "Yes", and you choose "Yes" to "Create user profile with submitted values", the user will be dormant (they will not be able to sign in) until payment for their membership is completed.

Require email address verification
If you choose "Yes" and you choose "Yes" to "Create user profile with submitted values", then this will only create the user account once the user has verified his or her email address.

Update anonymous users by email address
If you choose "Yes", when your form is submitted by a user who is not signed in but where the email address matches a user on your site, the values they enter will be used to update that user's profile.

Add user to this group
This dropdown menu will be pre-populated with a list of all the available groups on your site. When a user submits this form, their account will be added to this group.

Admin must approve group addition
If you choose "Yes" and the form is configured to add the user to a group, the user will not be added to the group but an email request will be sent to the form recipient, so they can confirm that the user can be added to the group.

Database

You can choose to set up your form to save into our database, so that you can download a spreadsheet with all the submissions in from your Control Panel. If you do not save your form into the database, and you do not have the form details emailed to you, you will not be able to retrieve the form submissions. We would usually suggest saving your form into the database, so that you always have the option to download a list of the submissions.

Save submissions in database
If you choose "Yes", when a visitor submits this form, the submitted data will be stored in a database. You will be able to view the data via the Control Panel.

Keep multiple value answers separate
If you choose "Yes", when a visitor ticks more than one answer in a check box list, each answer will be shown in a separate column in the resulting downloaded spreadsheet.

Restrict access to submitted forms to selected group
You can restrict access to data submitted via this form to members of a group here. The first time that you use this option, you will need to contact Cubik so that we can enable this feature for you.

Email

When a visitor submits the form, you can set the form up so that you will receive an email confirming all the submission details. You can send this email to as many people as you need.

Email address(es) that this form will be sent to.
Enter the email addresses in here that you would like to be notified of form submissions, separate multiple email addresses with a semi-colon.

Use this email address regardless of referring pages
Tick this box to cause the email address(es) above to always be used, regardless of the email address specified in any referring page that links to this form.

Reply-To address for the form email (leave blank for default).
When the email is generated, it will be sent from our system. If you accidentally reply to this email instead of responding to the visitor, the email will be sent to our system, and will not be seen. It is best to add your email address in here, so you will notice if this happens.

Email Subject
The subject of the form email. Enclose form labels in curly brackets {...} for the submitted values to be included in the subject. E.g: "A form submission by {Your Name}". The default for this option is '*Website form submission: {FormName}*'.

Email Format
The format of the email that is sent to you. By default, this is set to HTML, but if you have problems with the formatting, you can change this to Plain Text.

Include Submitted Values
If you choose 'No', the email that is sent to you will **not** include any of the values entered by the visitor. This is useful if you are collecting confidential information on the form, as sending information by email is not secure. If you choose not to include submitted values, you need to make sure the form is set up to save into the database.

Confirmation

This section gives you the setup options for the email that is sent to the person that filled in the form. To send a confirmation email to the person that filled in the form, you need to add the word 'Notify' into the parameters of a field using an Email Address input type.

Reply-To address for the confirmation email (leave blank for default).
When the email is generated, it will be sent from our system. If the user replies to this email, the

email will be sent to our system, and will not be seen. You should add your email address into the field so that any replies will come back to you.

Confirmation email Subject
The subject of the email that is sent to the site visitor. By default this is set to 'Confirmation', but you may like to make this more specific to the form.

Text to include at the top of the confirmation email
This is the text that appears at the top of the confirmation email, so you can define your own message to the visitor. By default, this is set to '*Thank you for filling in our form. A summary of the information you have sent us is given below.*'

Confirmation Email Format
The format of the email that is sent. By default, this is set to HTML, but if your site visitors have problems with the formatting, you can change this to Plain Text.

Include Submitted Values
If you choose 'No', the email that is sent to the visitor will **not** include any of the values that they entered. This is useful if you are collecting confidential information on the form, as sending information by email is not secure.

Payment

If you have commerce enabled on your website, you can set up your form to take payments. For more information on adding commerce to your site, please see our help articles: http://www.cubik.co.uk/help/what-can-i-do/commerce.

Payment Provider Description
This is the description that is passed to the payment provider for them to display to the visitor to let them know what is being paid for.

Use page display name for payment provider description
If you tick this box then the page display name will be passed through to your payment provider as the item being paid for, instead of the text entered in the box above.

Apply basket charge
If you tick this box, your basket-level charge will be applied to the payment, otherwise no additional charge will be added.

Submission value
The value you enter here will be added to what the customer is charged when they submit the form. If you do not tick 'Is Payment Value' on any items, then this is the total amount that the customer is charged. Otherwise, this amount is added to the total amount of the 'Is Payment Value' fields.

This form is a donation form?
If you tick this option, the form will be treated as a donation form instead of a payment form. Any payment emails will refer to a donation instead of a payment.

Post-payment page (success)
You can create a page on your website which will be displayed to your site visitors when their payment has been successful. This could include a thank you message, or a link to further information about their purchase. If this option is not set, the visitor will be returned to the form after payment.

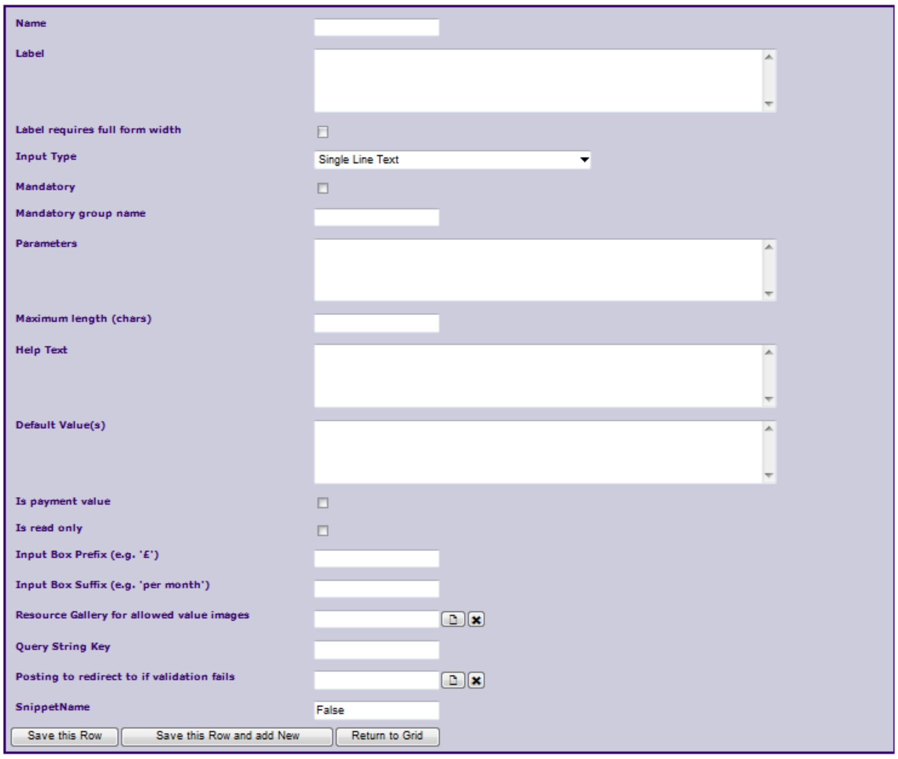
Post-payment page (failure)
This is the same as the option above, but will be displayed if the payment fails.

Commerce Type
If your site is set up to use different commerce types, choose the relevant commerce type here.

Commerce Definition
If your site is set up to use different commerce definitions, choose the relevant definition here.

Form Definition

The form definition is where you set up the questions that you would like to ask on the form. To start entering your questions, click the Edit Form Definition button, and then click New Item. This will bring up a screen like this:



Name

The name field is mainly used for ordering the fields in the CSV that you can download if you set up the form to save into the database. The columns in the CSV will be ordered alpha-numerically by Name, so it is a good idea to start the name with a number, e.g. 01 Forename, 02 Surname, 03 Email address etc.

Label

The Label of the question is what will display on the page for your site visitors, e.g. Forename, Surname, Email Address.

Label requires full form width

If the label of your question is very long, you can set the label to extend over the entire width of the page, with the question box underneath rather than having the label at the left hand side and the question at the right.

Input Type

The input type defines what kind of question you are asking on the page. The most common option is Single Line Text, which allows your site visitors to type in the box, but there are also more specific options for narrowing down the input. For a complete list of input types, along with examples of what they will look like, please see our help website:
http://www.cubik.co.uk/help/what-can-i-do/forms/input-types

Mandatory

If you would like to require that this field is filled in before the form can be submitted, tick this box.

Mandatory Group Name

This option allows you to define a set of questions, and require that at least one of them is filled in. A good example of this is if you ask for Home telephone, Work telephone and Mobile telephone, you can give all three of these questions the same Mandatory Group Name, and at least one of these fields must be filled in before the form can be submitted.

Parameters

The use of this option depends on the input type that you are using. If the field is an Email Address field, you can add the word *Notify* to the parameters to send out a confirmation email to the address that is entered in this field. If you are using a multiple selection input type like Radio Buttons or Dropdowns, you can enter a list of the options in this box, separated by a semi-colon. For more information on what should be entered in the parameters, refer to the relevant input type page on our help website: http://www.cubik.co.uk/help/what-can-i-do/forms/input-types

Maximum Length (chars)

If you would like to restrict the number of characters that are entered into the field, type the number into this box. When the field is output on the page, a countdown will display next to the page to show the user how many characters they have remaining. This option can be used with the Single Line Text and Multi Line Text input types.

Help Text
You can enter some text into this box to give your visitors some more information about what they should enter into this box. Depending on the setup of your site, the help text will either appear as text underneath the question, or as a tooltip when the user hovers over the question.

Default Value(s)
You can use this option to pre-populate the question with a value which will appear when the form first loads. You can use this to pre-populate a text box, or pre-select a value from a multi-selection input type.

Is Payment Value
If your form is a payment form, and you are allowing people to choose options on the form which will affect the payment value, you need to tick this option for each payment field. For more information on how to use this option, please see our help website:
http://www.cubik.co.uk/help/what-can-i-do/commerce/use-a-web-form-to-take-payments

Is Read Only
You can tick this option to add a field to the form which cannot be altered by the person filling in the form. For example, you could use this in conjunction with the User Property input types to pre-populate user information which will be sub mitted with the form, but not allow your users to change the information before the form is submitted.

Input Box Prefix (e.g. '£')
You can enter some text in this box which will be displayed before the input box on the form, e.g. a pound sign.

Input Box Suffix (e.g. 'per month')
You can enter some text in this box which will be displayed after the input box on the form, e.g. 'per month'.

Resource Gallery for allowed value images
If you are using a selection input type (e.g. Radio buttons or Checkbox List), you can set up a folder in the resource manager which contains images with the same name as the options available in the parameters box. When the form is displayed on screen, the images will be displayed for selection instead of the standard radio buttons or checkboxes.

Query String Key
It is possible to pre-populate fields on the form using an item in the Query String of the URL that is linking to this page. For example, if you have a generic booking form for all your events, you can link to this page using the URL www.yoursite.com/bookingform?event=Test. If you add 'event' into the Query String Key option, the field will be pre-populated with 'Test' when the form is loaded.

Posting to redirect to if validation fails
If you have advanced validation set up on your form, you can use this option to define a page on your site which the user will be taken to if they fail the validation. Advanced validation is

something that we will need to set up for you, so we will let you know if you need to use this option.

SnippetName
This is a custom option, so you will only need to use this option if you have been instructed to do so in your site setup.

When you have filled in all the relevant options for your form field, you can click the *Save this row and add new button*, to fill the form in again for each question on the form. When you get to the last question, click the *Save this Row* button. When you have saved the last row, you will be taken back to an overview of all the questions, so that you can make any changes if necessary. Once you are happy with the questions, click the OK button at the bottom right. The pop up box will disappear, and the page will refresh with your questions in it.

Post Submission Text

You can use this option to define a message which will appear on screen when the form is submitted. If you do not add a message in here, it will look like the screen has gone blank, so you need to make sure that you fill in this option. This placeholder works in the same way as the Page Body Content placeholder, so you can add any text, links and images in here.

If you have Radio Buttons, Dropdowns, or Checkbox Lists on your website, you can modify the Post Submission Text on your website to display different information based on what has been selected in the form. To do this, you need to type the following in the Post Submission Text area:

{{question name:possible answer}}

You can also use *{{question name:[any]}}* and *{{question name:[none]}}* and *{{all}}.*

For example, if you have a question with the name colour and the parameters Red;Blue;Green, you could enter the following in the Post-Submission Text area:

Thank you for filling in our form! Here's some information based on the answers that you have given.

{{colour:[any]}}

Thank you for telling us about your favourite colour!

{{colour:Red}}

We're glad to hear your favourite colour is red.

{{colour:[none]}}

It's a shame you didn't tell us about your favourite colour!

Control Panel

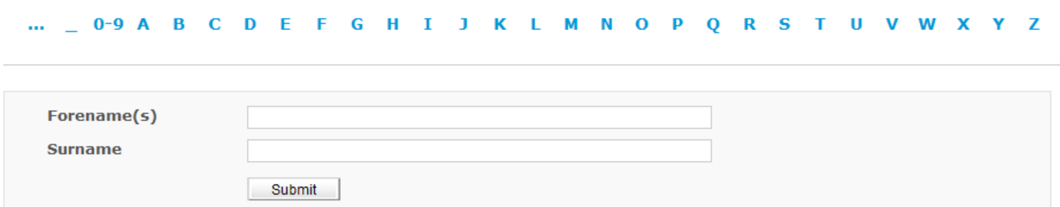
If you are an administrator of your website, you will have access to the Control Panel. The link for the Control Panel usually appears next to the Sign Out link at the top or bottom of your site. If you are not a full admin user, you may have restricted access to certain areas of the Control Panel (e.g. access only to the Shop Transaction Log).

User Administration

The User Administration area of the Control Panel allows you to administer the users on your website. The account of any registered user will appear in here, so you can edit their details, create accounts and delete accounts.

Searching for Users

There are two ways that you can search for users on the site. The first is to use the number and letter links to browser to find the user. The letters will usually show you all users with a surname starting with that letter, but we can change it to search on forename instead if you prefer.



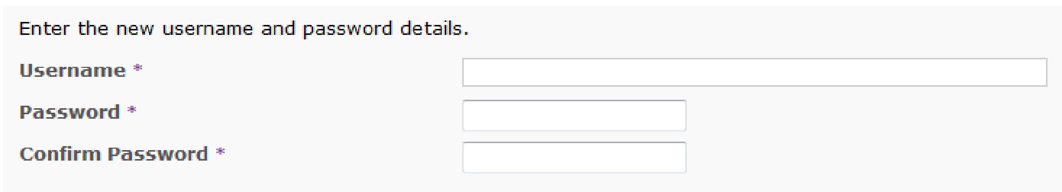
The second way to search for users is to use the boxes underneath the letter links and click Submit. By default, there will be two boxes (Forename and Surname). If you would like to search on other fields, just let us know and we will make them searchable.

If the search that you carry out only returns one user, you will be taken straight to their profile. Otherwise, you will see a list of users to allow you to choose which one to view.

Creating New Users

To create a new user on the website, simply click the New User link at the bottom of the User Administration screen.

The first section on the form will be for choosing a username and password.



The username must be no more than 15 characters. If you would like to restrict the characters that are entered into a username (e.g. no spaces or numbers), just let us know and we will apply this for you. The password can contain any combination of letters and numbers, and must be entered twice.

The next fields on the form will depend on the setup of your site, but typically include Forename, Surname and Email Address. Additional fields like address and telephone numbers can be added on request.

As an admin user, you will be able to decide what groups the user should be in. To be able to sign in to the site, all users must be in the *Users* group in addition to any other groups that they are placed in. The groups that are available will depend on the setup of your site.

As an admin user, you will also see three extra options at the bottom of the page.

Account Disabled
If this option is ticked, the account will be disabled and the user will not be able to sign in. This is a better option than deleting the user if you are not sure if you will want to reinstate the user again in the future.

Receive CMS Workflow Emails
This option is ticked by default for all users, but is only used for users that have permissions to edit the website. When you are working on pages on the website you can receive overnight emails to remind you of pages that require your attention (e.g. pages that require approval). If you do not want to receive these emails, you can untick this box.

Can Manage Profile
This option is ticked by default, and allows the user to change their own profile details e.g. forename, surname and password. If you don't want the user to be able to change their details (e.g. if you have a shared account for multiple users), you can untick this box.

When you have finished filling in all the fields, click the *Save* button at the bottom, and the new user account will be created, ready for the user to sign in.

User Roles

Depending on the setup of your site, you can have user roles set up, giving users different levels of permissions. The different user roles can either be applied site wide or on specific channels, meaning that you can have different users responsible for different areas of content. There are three different levels of permissions that you can have on your website:

Author

An author is a user of the website who may create or edit pages, but who is not authorised to approve those pages to the live website. Any changes that they make will need to be submitted to an editor or administrator for approval.

Editor

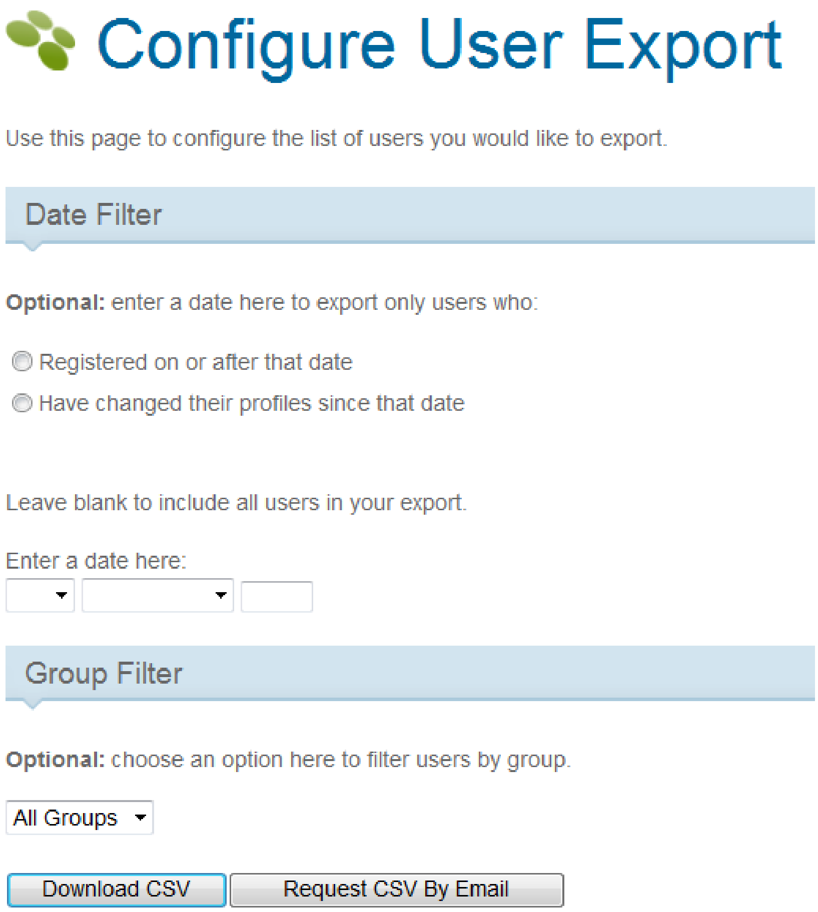
An editor is a user of the website who may create, edit and approve pages for publication to the live website, but does not have access to the Control Panel.

Administrator

An administrator is a user of the website who may sign in to create, edit and approve pages, and also has access to the Control Panel, for managing users, submitted forms and other features (described later).

Downloading a list of users

You can download a list of all the users on your website by clicking the *Download User List as CSV* link on the User Administration page. You can filter the users that are downloaded using two different filters.



The first filter is a date filter, which allows you to download users who have either registered or changed their profiles since a specified date. The second filter is a group filter, which allows you to download only users from a specific group. If you leave the options blank, all users will be downloaded.

Depending on the size of your website, you may have a lot of users, and you may find that the download times out before it is completed. If this happens, you can click the Request CSV By Email button, and we will generate the CSV on the server and send you an email with a link to download it. The process of generating the CSV files runs once an hour, so you should receive the email within an hour of requesting the file.

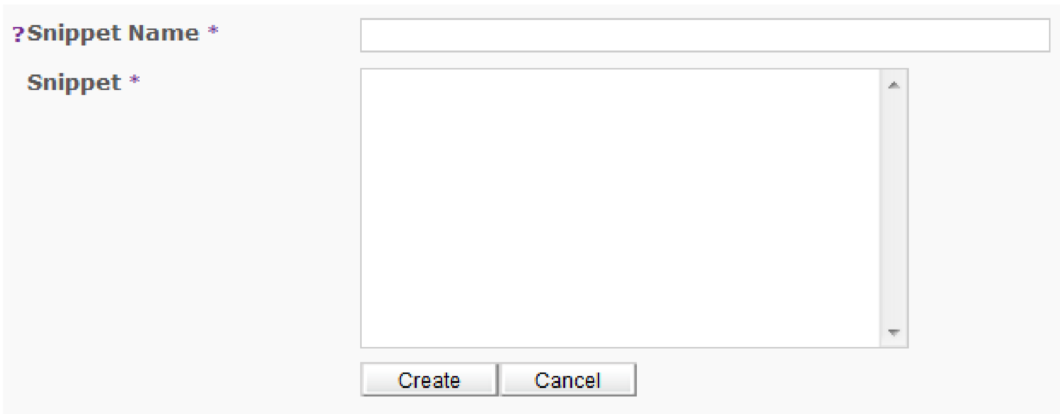
User Administration Audit

The User Administration Audit allows you to view a log of all the changes that are made to users on your website. Each time that a user changes any of the details in their profile, the old and new information will be written into this log. If a user changes the details of another user, you will be able to see who made that change. The log also records each time that a user signs in and out of the website. There is a calendar on this page, so that you can view the information from a specified date or date range.

Snippets

The Snippets area of the Control Panel allows you to add third party code into your web pages that would usually be stripped out of the Page Body Content editor. An example is a Google Map, or a Twitter/Facebook widget. You can also use the snippets feature to insert the same paragraph of text into multiple pages. Whenever the text needs to change, simply change the widget and all the pages will be updated automatically.

To add a new snippet, click the Add New Snippet link at the top of the page.



The Snippet Name is something that will help you identify the snippet at a later date. This will not be shown on the site, so can be anything you like. You need to paste the code of the snippet into the Snippet box. This is usually the code that was given to you by the external site. Once you have filled in these two boxes, click the Create button. You will then be taken back to a list of all the available snippets.

To use a Snippet, click the Get Snippet link. This will copy some text onto your clipboard in the format {snippet::xxx}, where xxx is the ID number of the snippet. If you try to use a snippet number that is not associated with your site, it will not work. To insert the snippet into a page, simply edit the page and click Paste wherever you want the snippet to appear.

To edit a snippet, click on the name of the snippet and you will be taken back to the screen you saw before. You will also see a Delete Snippet link on this page so you can remove the snippet. Once you delete the snippet, we cannot get it back for you, and it will be removed from all the pages it was used on, so be sure that you no longer need it before you delete it.

Poll Maintenance

If you have Polls enabled on your website, you can use this area of the Control Panel to set up your poll. If you cannot see the Poll Maintenance area on your site, please contact the Helpdesk to request that this feature is enabled for you.

On this page, you will see a list of any polls that you have already set up on your site. You can click on the name of the Poll to edit it, or to view information about the voting results. Please note that you cannot edit a poll if any votes have already been made.

To create a new Poll, click the Create New Poll button. This will bring up the following screen:

In the Question box, you should type the question that you want to ask your site visitors. In our example, we have typed 'What is the weather like today?'

In the Start Date and End Date boxes, type the dates when you want the Poll to start and finish. When the Poll reaches the end date, the voting will be closed and the results will be displayed on screen instead of the poll.

If you want your visitors to see the results of the Poll after they have voted, you can leave the ‘Display results after voting’ box checked.

The next step in setting up the Poll is to give your visitors some options to choose from. To do this, click New Item on the Allowed Responses field.

Type in the first allowed response, and then click Save. Repeat the process for each response that you want to add. When you have finished adding your responses, click the Save Poll button.

Once the poll is saved, you can add it into any page on your site which has the Poll placeholder enabled.

Website Workflow Audit Log

This page allows you to view a log of all the changes that have been made to the website. Each time that a page is saved, approved or deleted, this will be written into the log. If an image is uploaded, changed or deleted, this will also be written into the log. You can see what page was changed, what time the change was made at and who made the change.

There is a calendar on this page so that you can view the changes for a certain date or date range, and you can also choose to download the details to a CSV file.

Shop Transaction Log

If your website is set up to take payments, the Shop Transaction Log is where you can come to see details of any transaction that is made through your website.

At the top of the page are options for finding or filtering transactions. If you know the ID number of the transaction (this appears in the purchase emails), you can use the Find Transaction by ID box to quickly find the transaction.

If you have more than one shopping basket or payment form on your website, you can use the dropdown list to filter out the transactions so you can quickly see how many transactions are coming from each form or basket.

You can also use the calendar or the date dropdowns to filter the transaction log to a specific date or date range. There is a link for you to download a CSV of the current transactions.

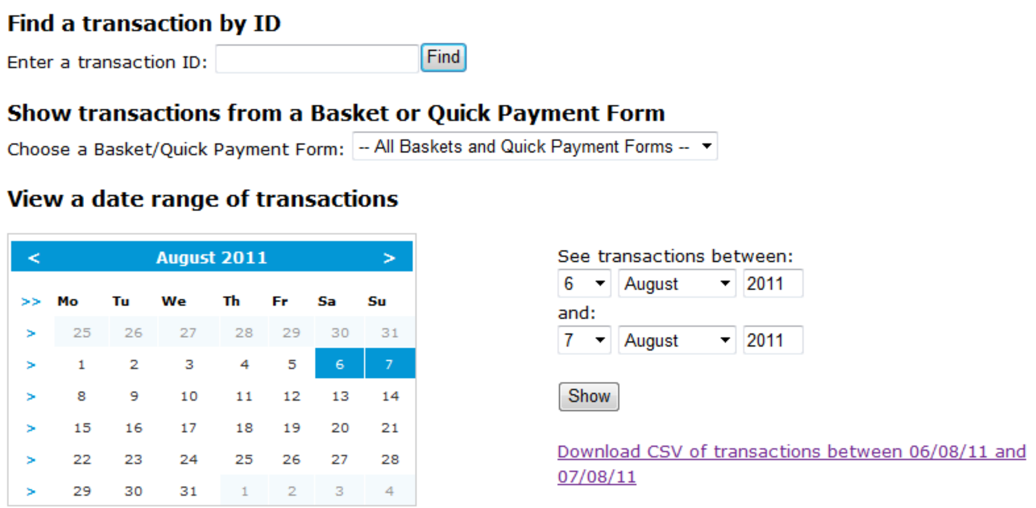
When you have chosen any filtering options, the transactions will appear on screen. You can click the reference number of any of the transactions to view more information about what was purchased, along with links to each of the product pages or payment forms. You have the ability to view detailed information about the transaction, which combines information about the user, information about the form submission (if there was one), and information about the transaction. This is useful if you want to print an overview of the transaction.

There are three statuses that a transaction can be in.

Payment Confirmed by Provider
This status means that the user has successfully made their payment at the payment provider, and has returned back to the website.

Payment Cancelled at Provider
This means that either the payment failed, or the user clicked the Cancel button when they were taken to your payment provider, and decided not to carry on with their transaction. Depending on the payment provider that you use, the provider status may give you some more information.

Payment Requested
This means that the user was taken to the payment provider but never returned back to our website. This could mean that they closed their browser before completing their payment, or could mean that there was a problem with the callback from the payment provider to the website. You should check on the Control Panel of your payment provider to see if the transaction was successful or not.



Submitted Forms

If you have set up any of your web forms to save into the database, the Submitted Forms area is where you go to download a CSV of the submissions.

You will see on screen a list of all the forms that are available for download. If you want to view submissions of a form that has been deleted, you can choose 'Show Deleted Forms' from the dropdown to view a list of deleted forms.

Clicking on the name of a form will take you to that form, so that you can view it or make changes to it. To download all submissions of a form, click the *Download* link. If the form has a lot of submissions, this may take a long time, so it is best to click the *Manage* link to download submissions from a smaller date range.

When you choose to Manage a form, there are a few options available to you.

Firstly, you can filter the submissions to a certain date and time, meaning that you do not have to re-download all the submissions just to view the latest information.

You can also choose whether to include Partial Submissions in the spreadsheet. A partial submission is one that a user has saved for later, but has not finished submitting yet. In most instances, you would not want to include these in the spreadsheet.

You can then choose what to do with the submissions that you have selected. Depending on the setup of your site, there will be either 2 or 3 options here. All sites will have the ability to download the submissions as a CSV, this is the default option that is selected.

The next option is to delete the submissions. Please note that once you delete the submissions, there is **no way for us to retrieve the submissions you deleted,** so please be sure that you have a backup, or that you definitely do not need the information that you are deleting.

Depending on the setup of your site, there may also be an option for you to download the submissions as a PDF. This is useful if you need the submissions to be easily printable or in a defined format. We can turn on the ability to download the submissions as a PDF free of charge, but any styling above the basic styling would require us to give you a quote.

Once you have chosen what to do with the form, click the *Perform Action* button.

Support Case Summary

If you have an issue with your site, or you need some help, we will raise a support case for your request. The Support Case Summary shows you a list of all your open cases, along with the current status, the latest note, and when the case has been scheduled for completion. You also have the ability to show the last 100 cases that were closed, so you can keep an eye on what has been worked on.

If you have never used the Support Case Summary before, you may need to request that we turn it on for you. There is a link on the Support Case Summary page if this is the case.

To view detailed information about a case, or to request an update, you can click on the Case Number. This will open a pop-up screen with information about the support case, including all notes that have been added to the case in the past. There is a link at the top of this page to contact us, either to request an update or to give us some more information.

At the top of the Support Case Summary is a link you can click on to report a new issue. Of course, you can always call us or email us to report an issue if you prefer.

My Profile

The My Profile area of the website is available for all users that have the 'Can Manage Profile' option ticked in their profile. Depending on the setup of your site, this will usually contain either 3 or 4 links.

View or Update Details

This link allows you to change any of the details stored against your account (e.g. Forename, Surname, Email Address etc). If you are an admin user, you also have the ability to change your group membership. Once you have made any necessary changes, click the *Save* button at the bottom of the page.

Change My Password

This screen allows you to change your password. You will need to enter your old password, then choose a new password. The new password will need to be entered twice, to confirm that it matches.

Delete My Account

This option allows a user to delete their user account from the site. Once the account is deleted, the user will no longer be able to sign in to the website. It is not possible for an admin user to delete their own user account (although another admin user could do it for them).

My Payment History

If your site is set up to take payments, the user can click this link to see a history of all the payments that they have made through the site. There is a calendar on this page so they can select a specific date range, and they can click on the transaction ID to view information about each of the items that they purchased.

Statistics

The Cubik system does not collect any statistics, although we have very good integration with Google Analytics. Signing up for a Google Analytics account is quick and easy, and they provide a wide range of reports. For more information about Google Analytics, please see our Introduction to Google Analytics guide:

www.cubik.co.uk/documents/pdf/google-analytics.pdf

Contact the Helpdesk

For further information on any of the items covered in this document, please see our help website: www.cubik.co.uk/help.

You can contact us by phone: 0113 2386735, or by email: help@cubik.co.uk