

REGIONAL COMMITTEES: SUPPORT TOOLS

NEAR YOU: SITEFINITY USER GUIDE

Issue 1: May 2012

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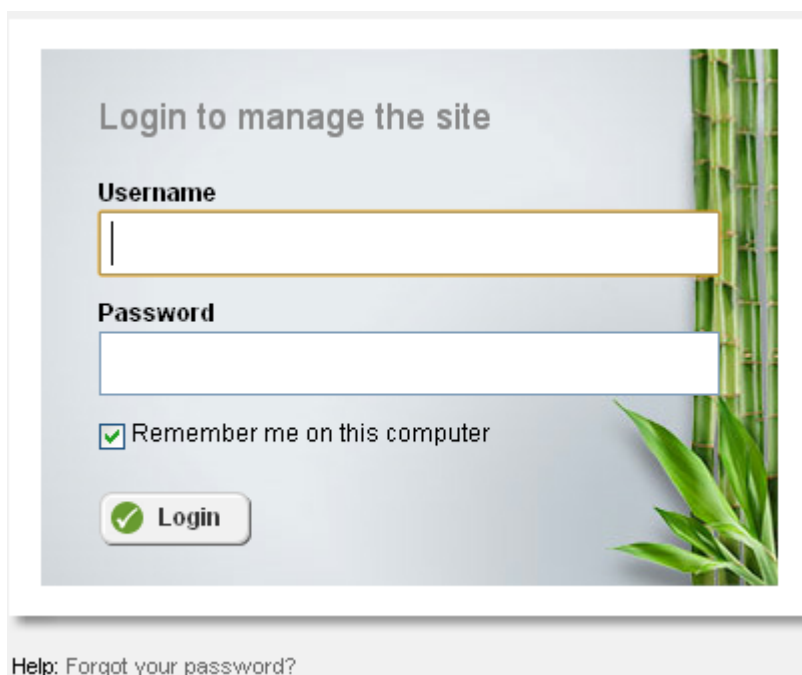
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The following guide will give you instructions on how to use the Sitefinity Content Management System to create content for the Near You website. It is assumed that persons using this system and this guide will be computer literate

To access the Sitefinity Content Management System.

Click <http://nearyou.imeche.org/Sitefinity> or type this address into the address bar of a web browser and press the Enter key.

You will be presented with the login screen below:

The image shows a login interface for Sitefinity. It has a light gray background with a vertical strip of green bamboo on the right side. The title "Login to manage the site" is at the top. Below it are two input fields: "Username" and "Password". The "Remember me on this computer" checkbox is checked. At the bottom is a "Login" button with a green checkmark icon. A link "Help: Forgot your password?" is at the bottom left.

Login to manage the site

Username

Password

☒ Remember me on this computer

Help: [Forgot your password?](#)

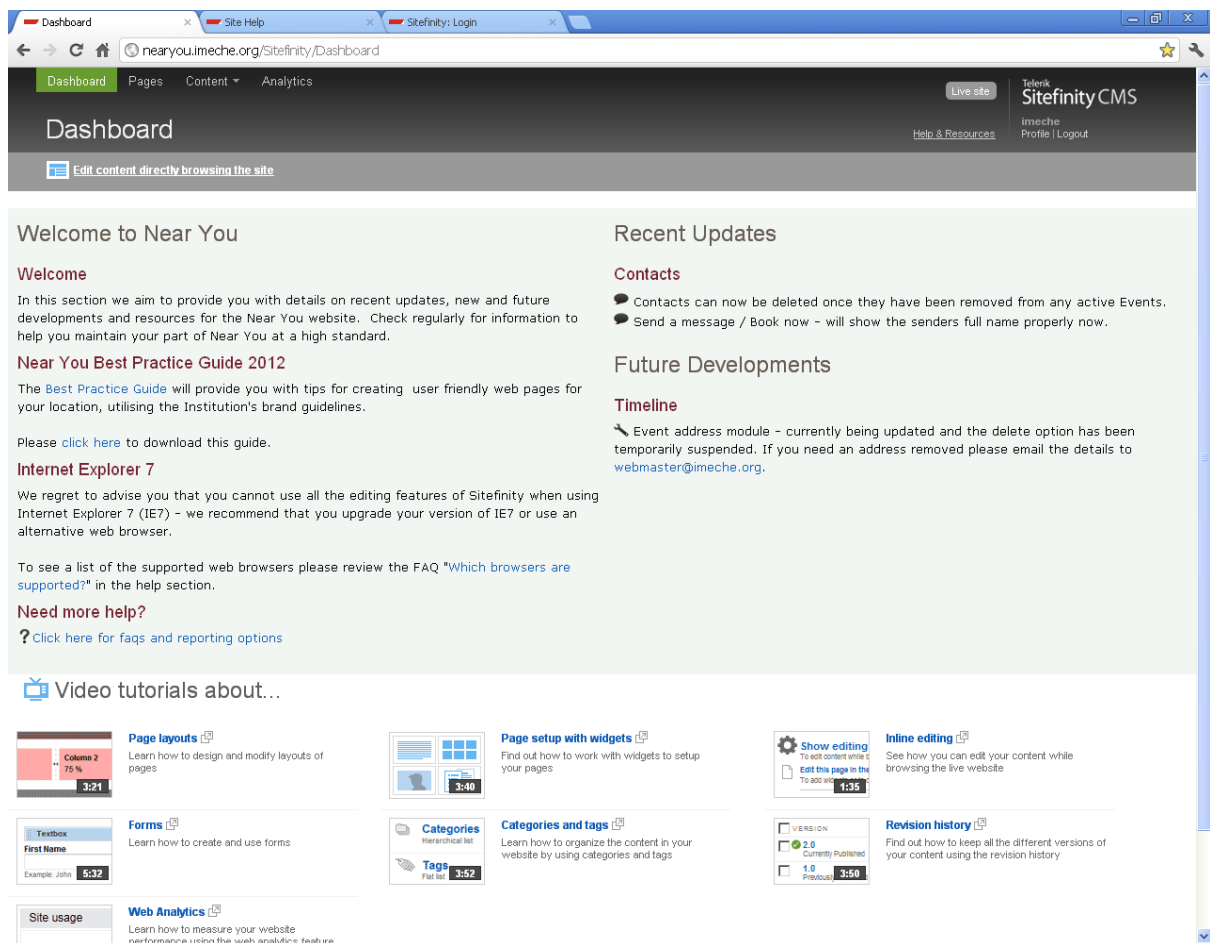
Type your Sitefinity Username and Password into the appropriate fields

TIP: Forgotten your password? Use the [password recovery screen](#).

TIP: Forgotten your username? Contact k_manning@imeche.org

Click the Login button

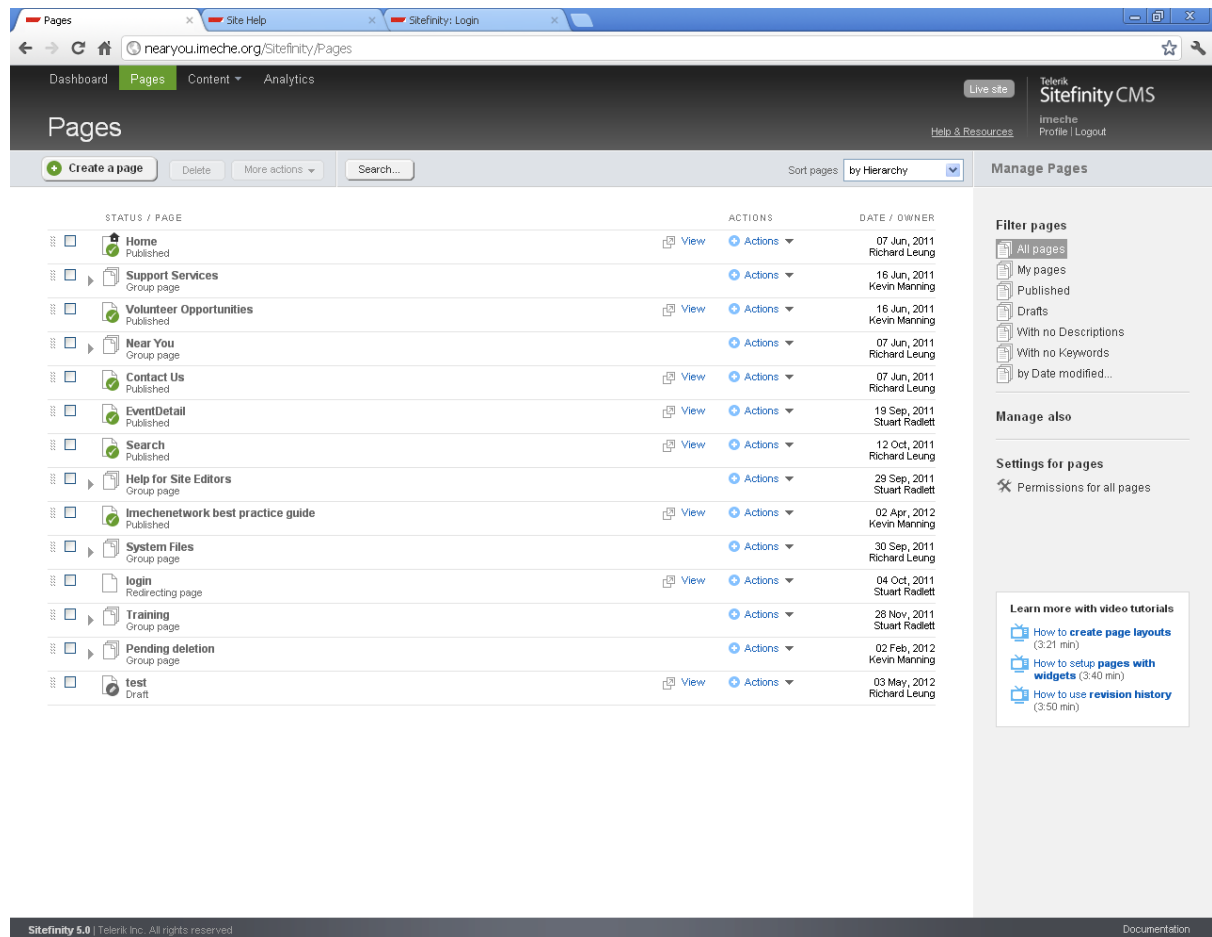
The Sitefinity dashboard will be displayed:



The dashboard consists of Video Tutorials, links to the Best Practice Guide, FAQ's and updates about the Sitefinity Content Management System. You also have the option of editing content directly whilst browsing the Near You website. You can also administer web pages, upload content such as documentation, create events, contacts etc and use Google Analytics to track web page visits.

Pages

The 'Pages' section consists of a hierarchical tree folder structure, which contains the pages that make up the Near You website. You will be only be able to edit pages that you have editing rights for. These will be denoted by the page name being **Blue**. Pages that you cannot edit will be 'greyed out'. Navigate to the section of the website you are entitled to edit.



Create a page

Click the checkbox next to the group page of the Region or Area you are responsible for editing, for example Suffolk and North Essex

Click the 'Create a child of the selected page' button

PLEASE NOTE: If the text on this button is 'Create a page' you haven't clicked the checkbox next to your group page! Make sure you do this before continuing.

You will be presented with the following page:

Properties and Titles

Pages

Site Help

Sitefinity: Login

nearyou.imeche.org/Sitefinity/Pages#event=showWindow&winId=ct004_frontendPagesListView_ct000_ct000_itemsTreeTable_ct000_ct000_createChild&autoMax=false

Back to Pages

Create a page

Name

Displayed in navigation. Example: About Us

Put this page...

☐ At top level

☒ Under parent page...

system-files > test-area [Change](#)

URL

/system-files/test-area/

☒ Show in navigation

☐ Use this page only to group other pages

This page doesn't have its own content and redirects to the first subpage

☐ This page redirects to another page

This page doesn't have its own content and redirects to another page in the website or to an external page

Title for search engines

Displayed in browser title bar and in search results. Make it more descriptive

Do you want this template to be based on another template?

☒ Use template

IME Standard

Custom

[Select another Template](#)

☐ Don't use template (start from scratch)

► Description, Keywords (for search engines only)

► Advanced options (Caching, Multiple URLs, Head tags)

This page contains various fields but only following fields require mandatory input

Name: type the name of your page here. Each page name must have a full name – with no abbreviations - to aid with search engine rankings.

Title for search engines: this will be auto filled with the text you have typed into the Name field; append the following text to the end of the text “ – Institution of Mechanical Engineers”

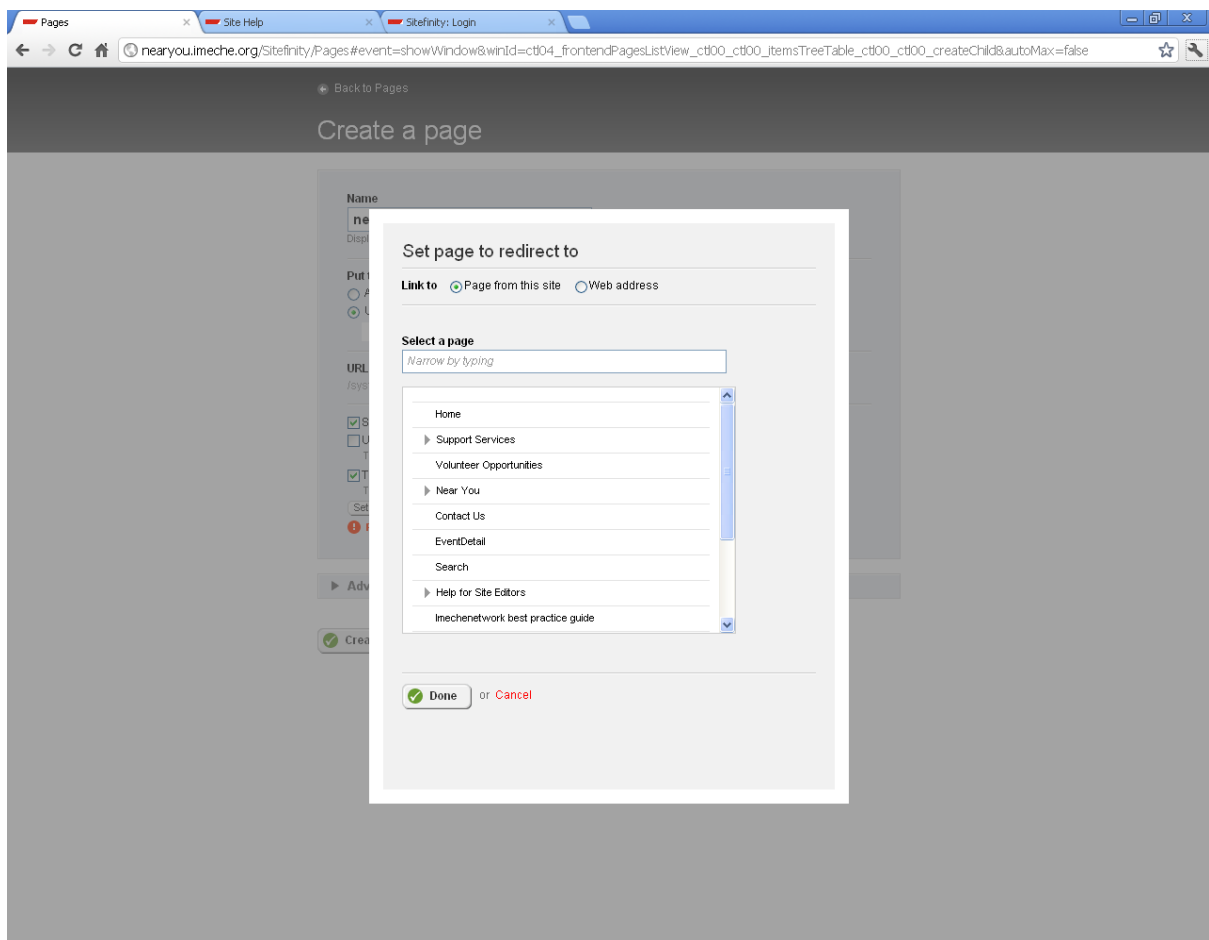
There are also three checkboxes that you can manipulate. These are:

- ☒ Show in navigation
- ☐ Use this page only to group other pages
This page doesn't have its own content and redirects to the first subpage
- ☐ This page redirects to another page
This page doesn't have its own content and redirects to another page in the website or to an external page

The Show in Navigation checkbox This is checked by default. Uncheck it if you wish the page to be hidden in the navbar

Use this page only to group other pages: Click this to create a Group Page

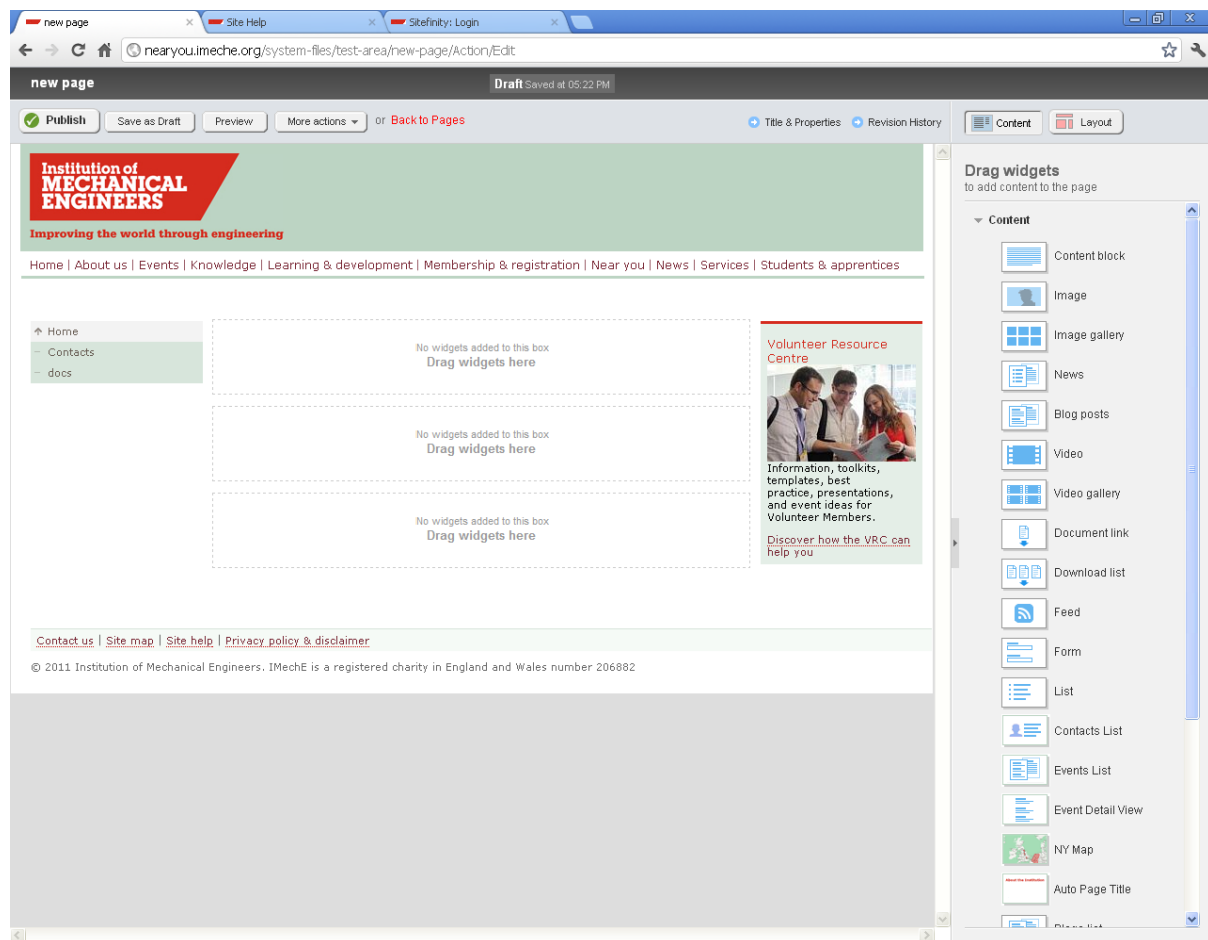
This page redirects to another page: Click this to redirect the page to another page on the website or to an external webpage / website. You will then need to click the set page to redirect to button and specify which page you wish to redirect to, either internally or externally



Once you have completed the mandatory fields, click the 'Create and go to add content' button

The following page will be displayed:

Edit page content



This page comprises of the following sections:

The main section where the web page is displayed.

Please note: you cannot edit anything within this section. You can however edit the content of a widget, such as a Content Block once you have dragged and dropped one onto the page.

The section on the right hand side contains the Widget Content Groups. Of the widgets contained here, you will only use the ones contained within:

- Content
- Scripts and Styles
- Social

The following widgets are part of the **Content** widget group

Content block

Use this widget to enter content directly using the text editor and its features. [Learn more](#).

Image

Use this widget to display a single image on your page. You can choose an image from the already uploaded or upload a new image. [Learn more](#)

Image gallery

Use this widget to display a gallery of image thumbnails, where each image can be opened individually. You can choose images from the already uploaded or upload new images. [Learn more](#).

News

Not currently used

Blog posts

Not currently used

Video

Not currently used

Video gallery

Not currently used

Document link

Use this widget to display a link to a single document on your page. You can choose a document from the already uploaded or upload a new document. [Learn more](#).

Download list

Use this widget to display a list or table of links to documents, where each document can be downloaded. You can choose documents from the already uploaded or upload new documents. [Learn more](#)

Feed

Not currently used

Form

Use this widget to display forms that you have created with the form builder.

List

Use this widget to display already created lists with list items.

Contacts Lists

Use this widget to display already created contacts. [Learn how to create a contact.](#)

Events Lists

Use this widget to display already created events. [Learn how to create an event.](#)

Events Detail View

Use this widget to display the details of already created events.

NY Map

This widget is used to display the dynamic Google map of the Regions and Areas on the Near You home page.

Auto Page Title

Use this widget to display the title of your page.

Blogs list

Not currently used

Forums

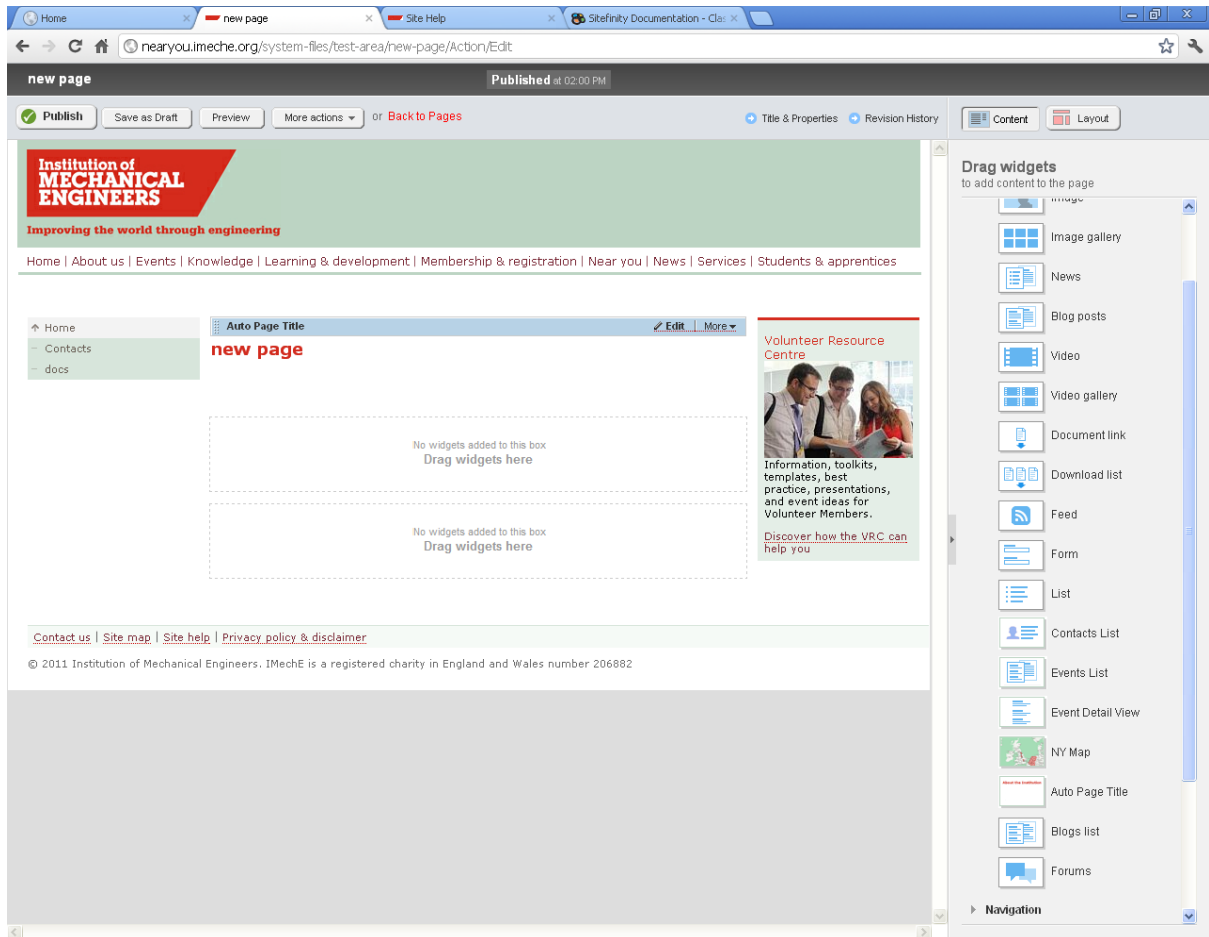
Not currently used

Create Page Content

Let us start by using the Auto Page Title widget

Position your mouse over the Auto Page Title widget.

Drag and drop this widget onto the relevant part of the page



PLEASE NOTE: You cannot edit the Auto Page Title widget. If you would like to create your own heading for your web page, do the following:

1. Drag and drop the Content Block onto the page,
2. Click 'Edit' on the Content Block
3. Enter the preferred title of your page onto the Text Editor WYSIWYG
4. Click the 'Save' button

PLEASE NOTE: If using a content block to create a page title, format your text with the <H1> tag. This tag must be used for all page titles

Formatting paragraphs

Using the text editor you can also format paragraphs.

Copying and pasting

You can insert already created content from another source using editor's different pasting functions.

Inserting and removing hyperlinks

You can create hyperlinks to webpages, e-mails, and anchors in the text.

[Learn more](#)

Inserting objects

You can insert various objects, such as tables, images, documents, symbols, and more.

Undoing, redoing, and other shortcut key functions

The text editor also has functions that are not part of the toolbar, such as undoing and redoing.

Other toolbar functions

You can use additional toolbar and shortcut key functions, such as spellchecking, printing, finding and replacing, and more.

Use the text editor in HTML mode

You can enter and edit text as HTML code.

The functions in the toolbar are divided in two types of modes – basic mode and advanced mode. To switch between the two modes, use the button in the upper-right corner of the text editor.

Shared content

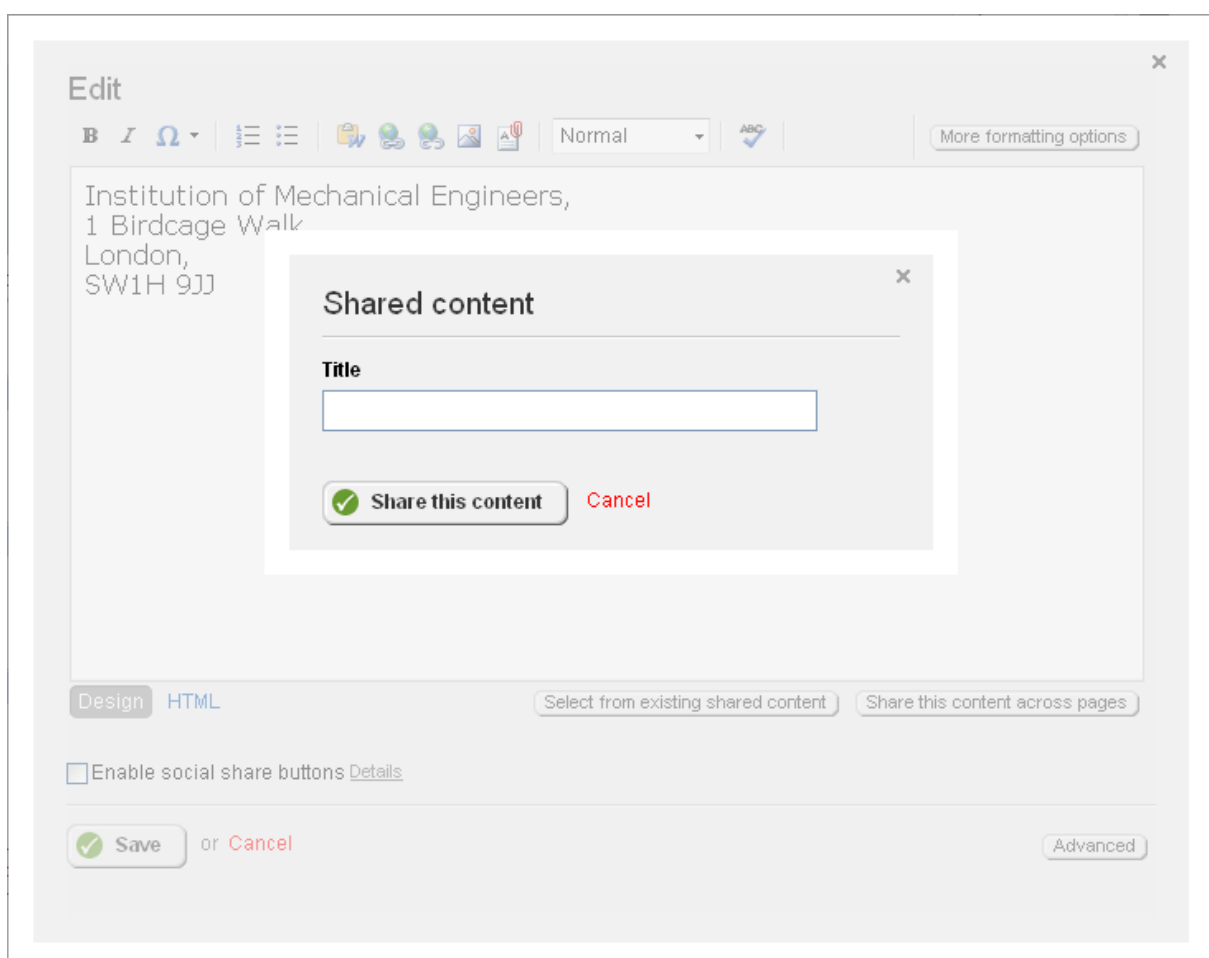
Use the “Shared content” option when content is duplicated throughout a website, for example an address.

To share content:

Use a Content Block widget to create content such as an address

Click the “Share this content across pages” button

The following pop-up will appear:



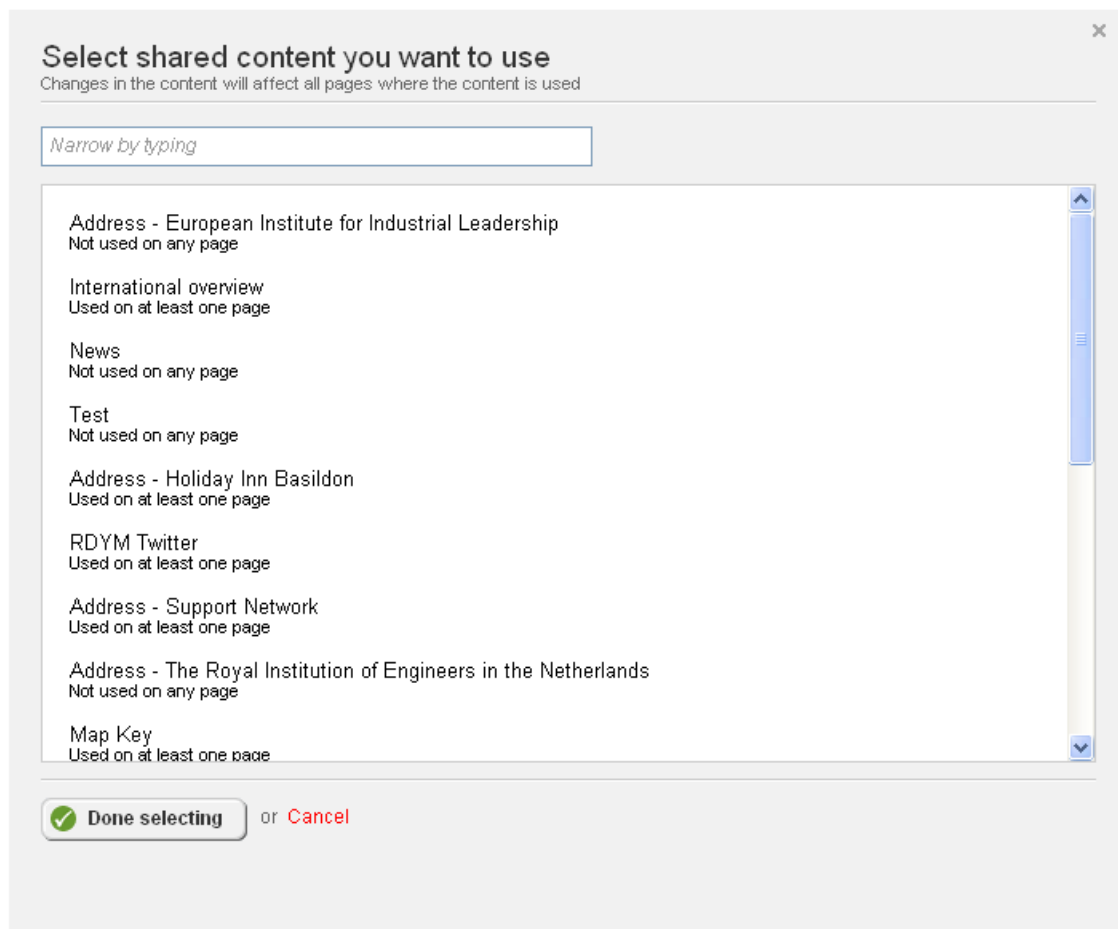
Enter the title of your shared content into the “Shared content” field

Click the “Share this content” button

To use existing shared content

Click the “Select from existing shared content” button

The following page will be displayed:



Select the shared content you wish to use and click the "Done selecting" button

TIP: Use the "Search" field to narrow your search

The shared content you have selected will be transferred onto the Content Block Widget

Click the "Save changes" button

Click the "Publish" button to publish your webpage

PLEASE NOTE: - If you make any changes to the content it will affect all pages where the shared content is used. If you wish any changes made to affect the page you are currently editing then click the "Unshare" button before making your changes.

Inserting and removing hyperlinks

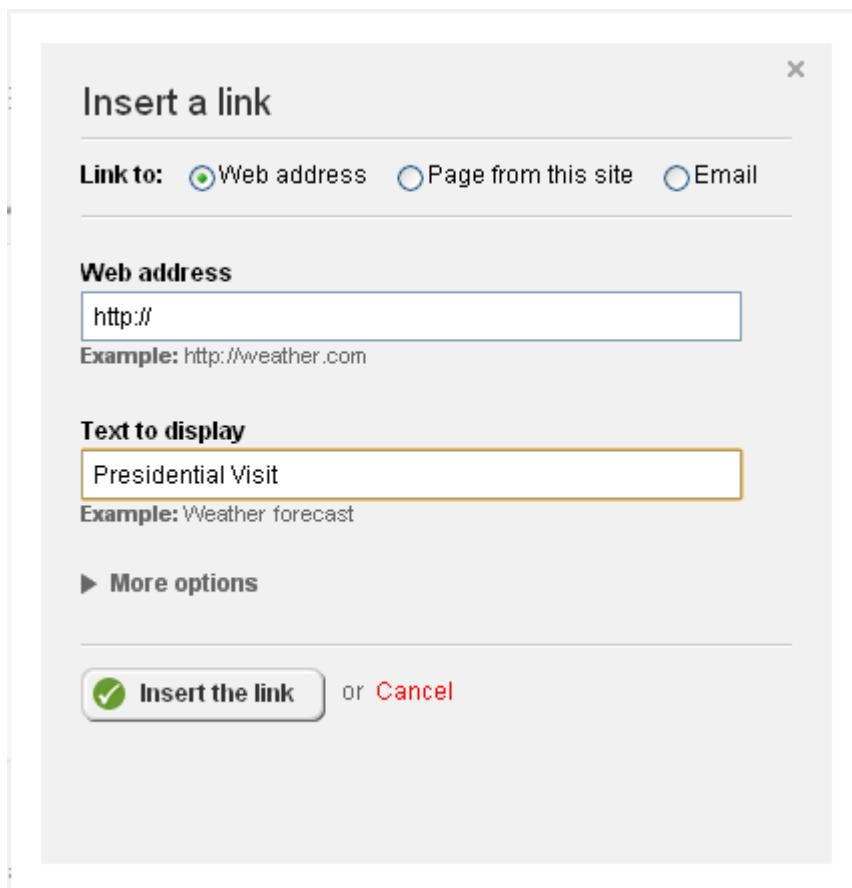
Use hyperlinks to forward the reader of the text to specific websites, documents, other places in the text, or an e-mail address. You can also write tooltips. You use the Hyperlink Manager to set such hyperlinks, anchors in text, and tooltips.

To create a hyperlink

Open the text editor

Highlight the text you wish to hyperlink

Click **Hyperlink Manager** or press **CTRL+K**. The following screen will appear:



On Hyperlink tab, perform the following:

Enter the address of the webpage, which you want to reference into the the "Web address" field

For example www.imeche.org

Enter the name of the link as you want it to appear on your webpage into the "Text to display" field.

By default the word or phrase that you have selected appears in the field. You can change the word that appears as a hyperlink on your webpage.

In Target dropdown box, select the way you want the linked website to open when clicked, for example, in a New Window or in the Same Window.

In Tooltip input field, you can enter a tooltip text that appears as the user hovers over the hyperlink. For example, "Clicking this link will open a new window".

In CSS Class you can change the formatting of the link by applying a specific CSS.

When finished, click OK.

The system sets the hyperlink and changes its formatting.

PLEASE NOTE: If you do not select a word or phrase, but only place the cursor where you want to set a hyperlink, the text that appears on the webpage as a hyperlink is the URL address of the webpage which you are linking.

If you select a word or phrase, but delete the contents of the Link Text field, the URL address will appear instead of the selected word or phrase.

Setting a hyperlink to an e-mail address

Select a word or phrase which you want to make a hyperlink.

When the hyperlink is clicked on the website it opens your e-mail client.

Click Hyperlink Manager or press CTRL+K.

A window appears.

On E-mail tab, perform the following:

In Address input field, enter the e-mail address which you want to reference. For example, EasternPublicity@imechenetwork.org .

In Link Text input field, enter the name of the link as you want it to appear on your webpage.

PLEASE NOTE: The Link Text input field appears only if you have not selected any text for the hyperlink. In this case you must enter text that appears as hyperlink text on your website.

In Subject input field, enter the subject of the e-mail.

In Tooltip input field, you can enter a tooltip text that appears as the user hovers over the hyperlink.

In CSS Class you can change the formatting of the link by applying a specific CSS.

When finished, click OK. The system sets the hyperlink and changes its formatting.

Creating a tooltip

You can create a tooltip for a word or phrase, describing the text you have hyperlinked. The tooltip appears when the user hovers over the word or phrase.

Select a word or phrase which you want to make a hyperlink.

Click Hyperlink Manager or press CTRL+K.

A window appears.

On Hyperlink tab, in Tooltip input field, you can enter a tooltip text that appears as the user hovers over the hyperlink.

When finished, click OK.

PLEASE NOTE: You can also set a tooltip for a hyperlink to a website or a hyperlink to an anchor in the text. For more information, see the above procedures.

Editing a hyperlink

To edit a hyperlink, place the cursor on the hyperlink and open the context menu.

Select Properties...

The Hyperlink Manager opens.

For more information, see the respective procedure above.

Remove Link (CTRL+SHIFT+K)

To remove a hyperlink to a webpage, a specific anchor in the text, an e-mail address, or a tooltip, place the cursor on the hyperlinked word or phrase.

Click Remove Link in the toolbar, select Remove Link from the context menu of the link, or press CTRL+SHIFT+K.

The system removes the link and the formatting.

Document link

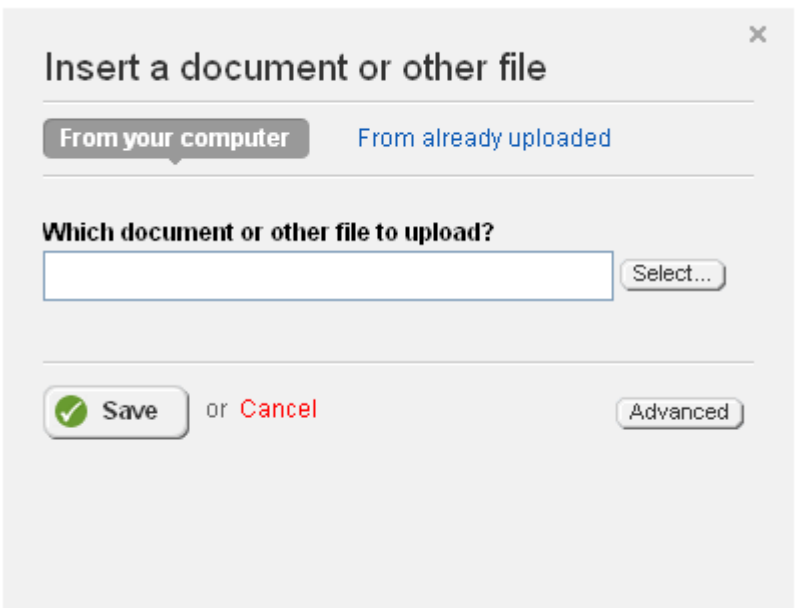
Use this widget to display a link to a single document on your page. You can choose a document that has been already uploaded or you can upload a new document.

[Create](#) or [edit a page](#) in the usual way.

Drag and drop the Document Link widget onto your page.

Click "Select a document or other file" or Edit

The following screen will appear:

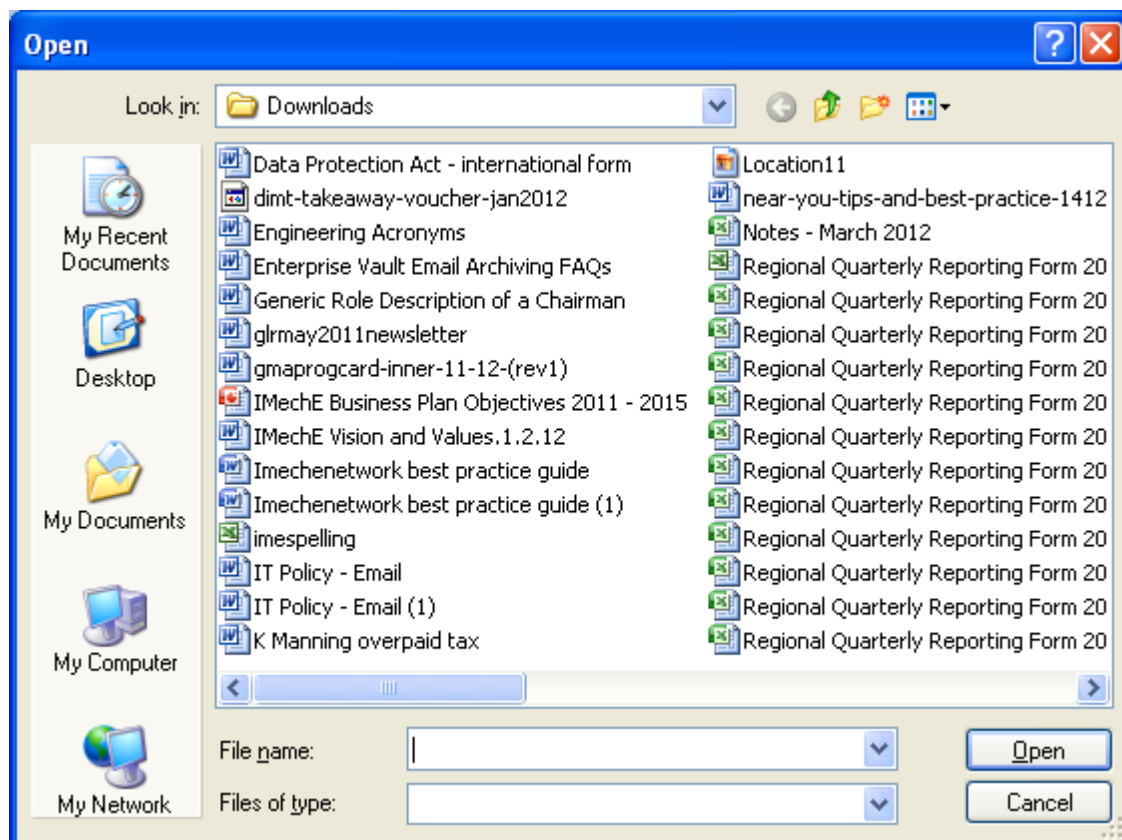


The screenshot shows a dialog box titled "Insert a document or other file" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "From your computer" (which is selected and highlighted in grey) and "From already uploaded" (in blue). Under the "From your computer" tab, the text "Which document or other file to upload?" is followed by a text input field and a "Select..." button. At the bottom of the dialog, there are three buttons: a "Save" button with a green checkmark icon, the word "or" in red, a "Cancel" button in red text, and an "Advanced" button.

The default setting enables you to upload a file from your computer

Click the "Select..." button

The following pop up will appear:



Navigate to where the documents are stored on your computer

Click the document you wish to upload

Click the “Open” button

The pop up will close and the document you selected will be transferred to the **“Which document or other file to upload?”** text field

Select an appropriate Document Library from the **“Where to store the uploaded document/file?”** dropdown list or Create a new library to store the document in.

TIP: Search for items in a dropdown list more efficiently by typing the first letter(s) of the item you are searching for.

Click the “Upload” button; the link to the document will be inserted into your webpage

Click the “Publish” button

Download List

If you have several documents to insert into a web page, use the Download List Widget. This removes the need to manually insert documents into your web pages. Just upload your documents to a specific folder and they will automatically appear on a web page courtesy of the Download List!

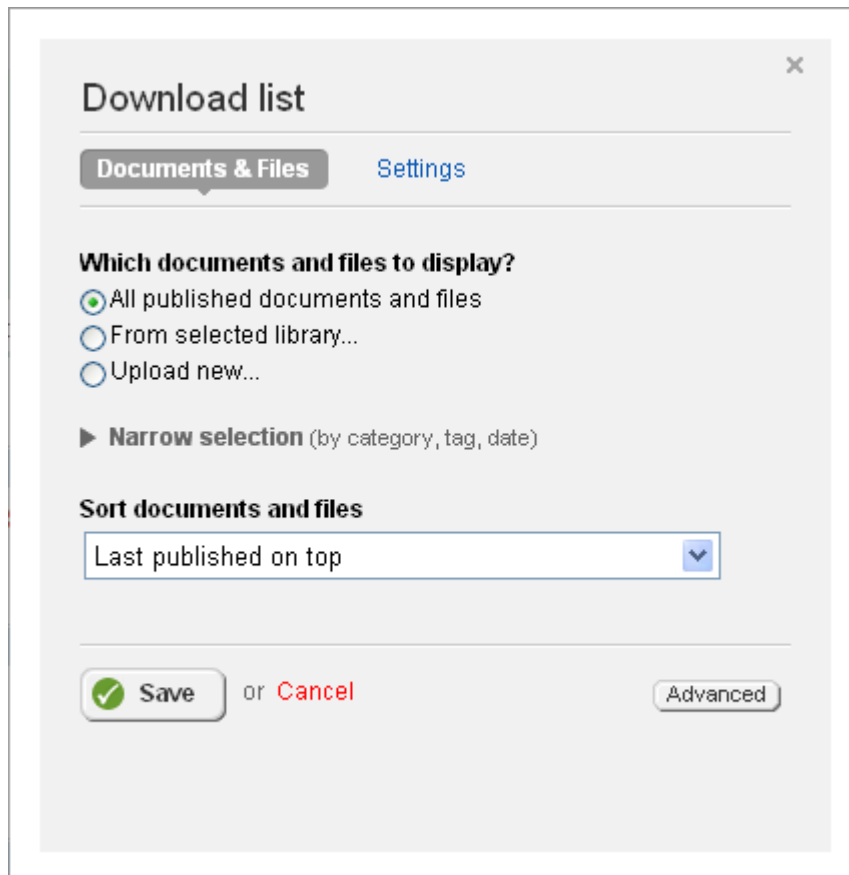
How to create a Download List

[Edit your page](#) or [create your page](#) in the usual way

Drag and drop the Download List widget onto the page

Please Note: - The Download List widget's default setting will initially display ALL documents that have been uploaded to Sitefinity. You will need to select the appropriate document library for your Area by the following actions:

1. Click edit on the Download List widget; you will be presented with the following pop-up



Change the **“Which documents and files to display”** setting from **“All published documents and files”** to either:

- From selected library

If you select this option, you will need to select a Document Library that has already been created. You can narrow your search by typing the name of the Document Library you wish to use into the Search Box. Click the Document Library you wish to use and click the **“Done selecting”** button and click the **“Save”** button.

- Upload new...

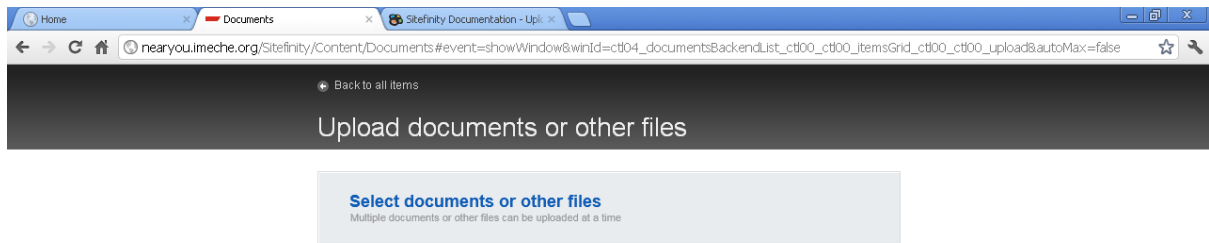
Select this option to upload new documents onto the system. You can upload new documents into an existing Document Library, or create a brand new Document Library to upload your documents into.

To upload a new document:

Click the 'Upload' button

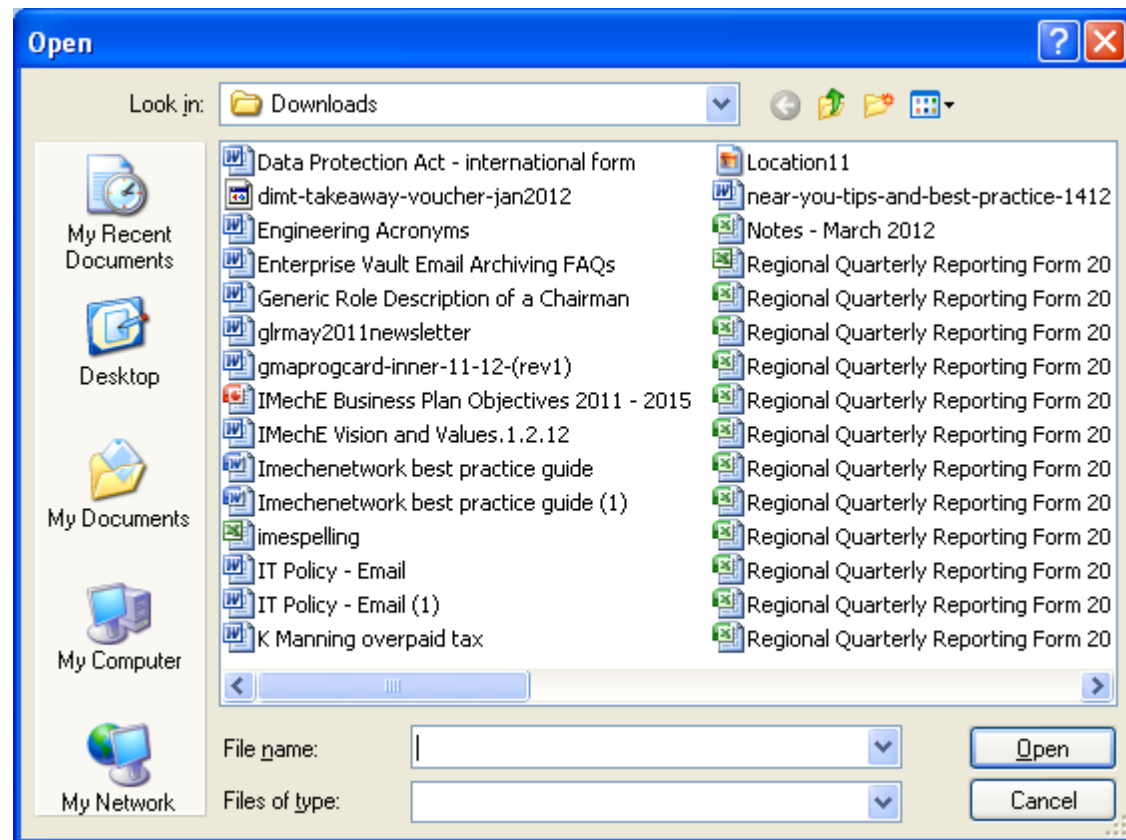
The following screen will appear:

The **"Upload documents or other files"** page appears.



Click the **Select documents or other files** link.

The following pop up will appear:



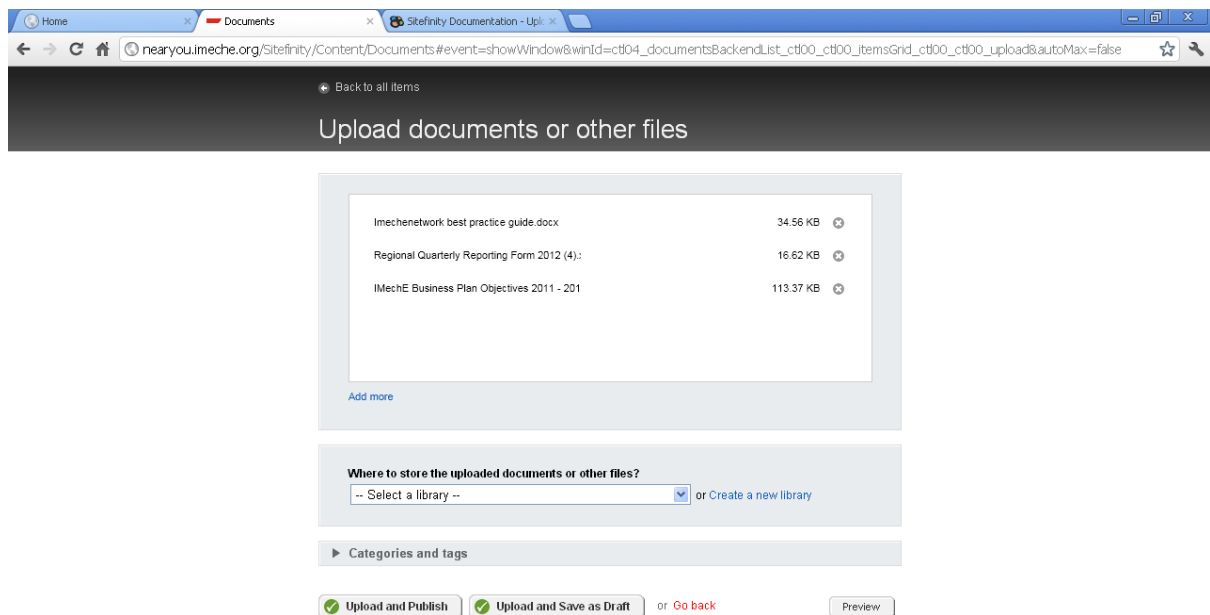
Navigate to where the documents are stored on your computer

Click the document you wish to upload

TIP: - You can select multiple documents by holding down the <Ctrl> key and clicking the documents you wish to upload

Click the “Open” button

The pop up will close and the documents you selected will be transferred to the Upload Images page (example below):



TIP: You can remove any documents you may have erroneously uploaded by clicking the 'X' icon next to that document.

TIP: You can add more documents to the ones you may have already uploaded by clicking the "Add more" link and repeating the above procedure.

Select whether you would like to upload your documents to an existing Document Library or to a new Document Library

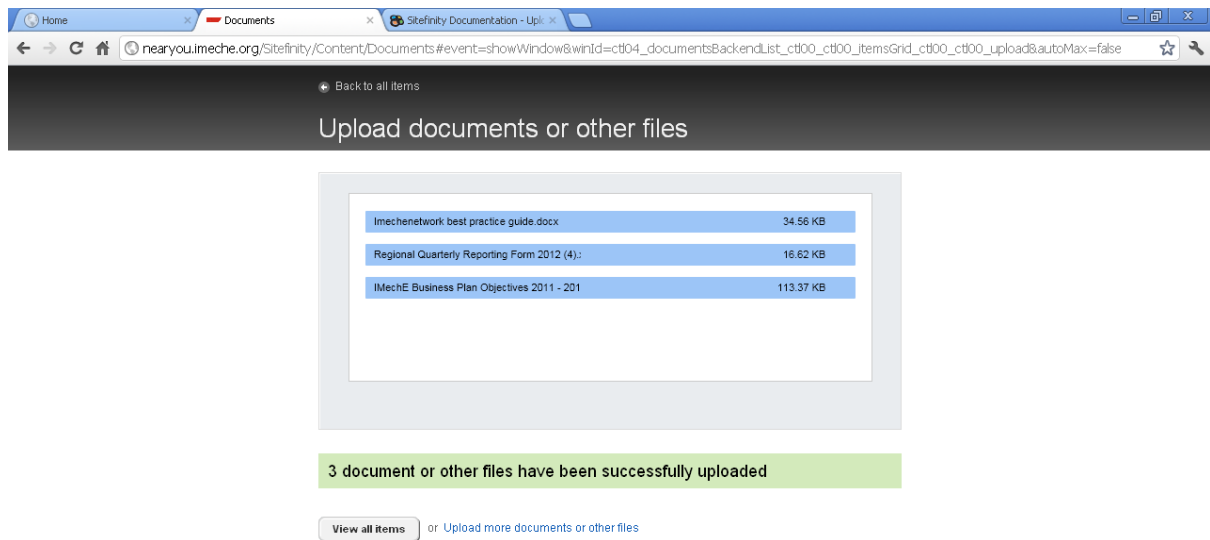
To store documents in an existing Document Library

Select an appropriate Document Library from the **"Where to store the uploaded documents or other files?"** dropdown list

TIP: Search for items in a dropdown list more efficiently by typing the first letter(s) of the item you are searching for.

Click the "Upload and Publish" button

A message telling you that your documents have been successfully uploaded should appear (below)



To store documents in a new Document Library

Click the "Create a new library" link

The following pop up will be displayed:

The screenshot shows a "Create a library" pop-up form. It has a title bar with a close button (X). The form contains a label "Library name" above a text input field. Below the input field, there is a hint text: "Example: Summer vacation". At the bottom of the form, there are two buttons: "Create this library" (with a green checkmark icon) and "Cancel" (in red text).

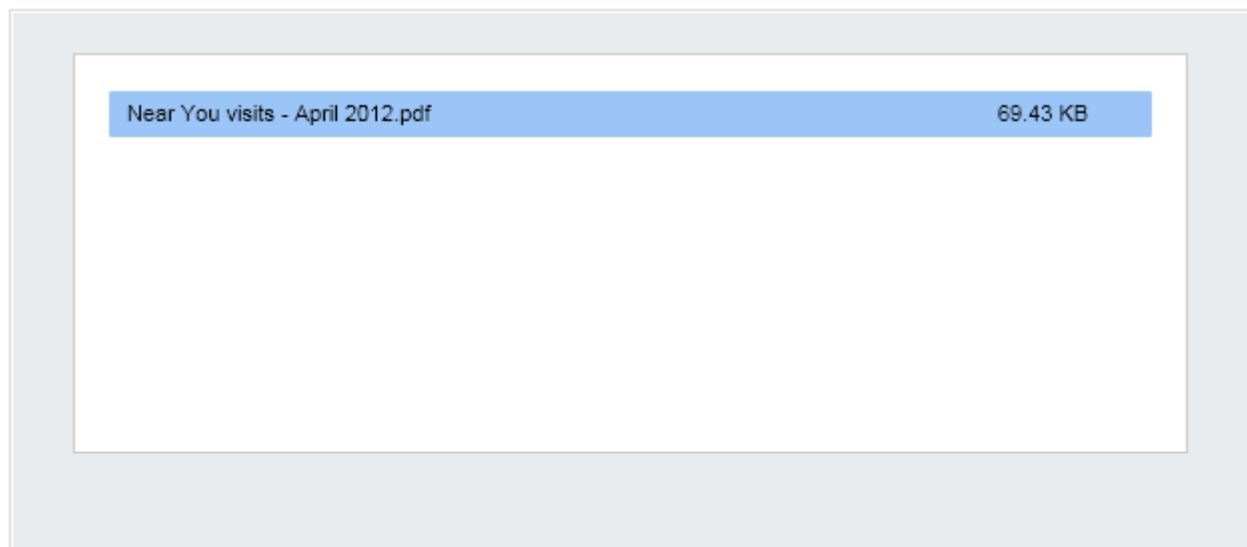
Type the name of your library into the “Library name” field and click the “Create this library” button

TIP: - For ease of navigation, the user must adhere to the following naming convention; If they are a member of the Eastern Young Members Panel, then all new libraries should have the naming convention of: Eastern Young Members Panel (followed by a space dash space) – (followed by the name of the library). For example: - Eastern Young Members Panel - newsletters. **Please note:** - Sitefinity does not allow you to nest folders , hence the importance of proper naming conventions.

Select your newly created Document Library from the **“Where to store the uploaded documents or other files?”** dropdown list

Click the “Upload and Publish” button

A message telling you that your documents have been successfully uploaded should appear (below):



1 document or other file has been successfully uploaded

[Back to edit page](#)

or [Upload more documents or other files](#)

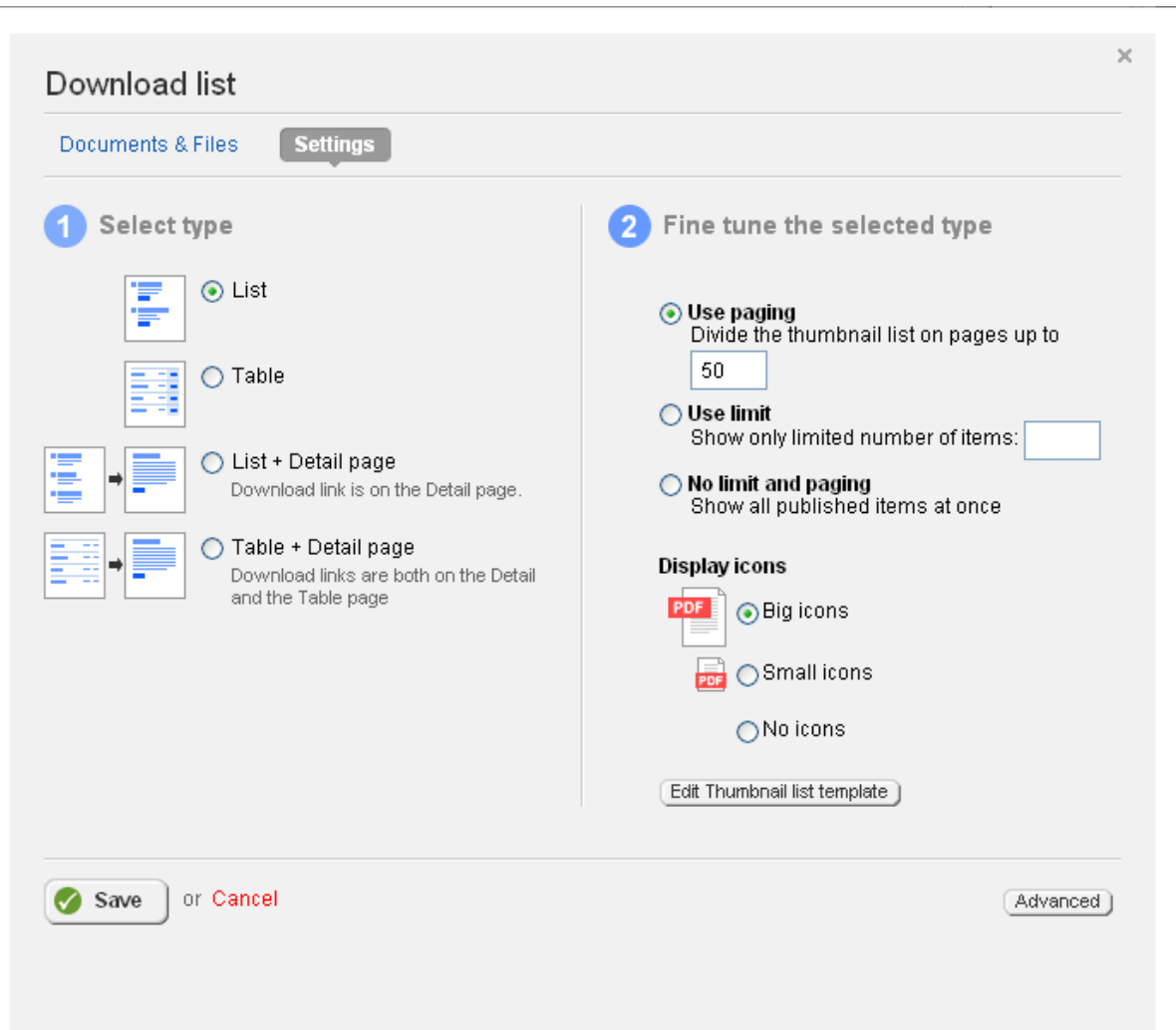
Click the “Back to edit page” button to return to the Download list page or choose to [upload more documents or other files](#)

TIP: You can classify your documents and files using “**Categories and tags**”.

To choose a setting for your Download List

Click the “Settings” link

The following screen will appear:



The screenshot shows a dialog box titled "Download list" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Documents & Files" and "Settings", with "Settings" being the active tab. The dialog is divided into two main sections: "1 Select type" and "2 Fine tune the selected type".

1 Select type

- ☒ List
- ☐ Table
- ☐ List + Detail page
Download link is on the Detail page.
- ☐ Table + Detail page
Download links are both on the Detail and the Table page

2 Fine tune the selected type

- ☒ Use paging
Divide the thumbnail list on pages up to
- ☐ Use limit
Show only limited number of items:
- ☐ No limit and paging
Show all published items at once

Display icons

- ☒ Big icons
- ☐ Small icons
- ☐ No icons

Below these options is a button labeled "Edit Thumbnail list template".

At the bottom of the dialog, there are two buttons: "Save" (with a green checkmark icon) and "Cancel" (in red text), separated by the word "or". To the right of these buttons is an "Advanced" button.

Select one of the following list types:

List

Selecting this option will give you a bullet point list of documents, with the file type and size being displayed underneath the document link.

Example:

**Institution of
MECHANICAL
ENGINEERS**

Improving the world through engineering

Home | About us | Events | Knowledge | Learning & development | Membership & registration | Near you | News | Services | Students & apprentices

↑ Home

↑ Example Website


– Events

– Twitter

Documentation

- [Near You visits - April 2012 first 500](#)
PDF, 291.96 KB
- [Near You Top Tips](#)
DOC, 25.50 KB
- [Near You Hits April 2012](#)
XML, 201.72 KB
- [Imechenetwork best practice guide \(1\)](#)
DOCX, 34.56 KB
- [IMEchE Business Plan Objectives 2011 - 2015](#)
PPTX, 113.37 KB
- [Regional Quarterly Reporting Form 2012 \(4\)](#)
XLSX, 16.63 KB
- [Imechenetwork best practice guide](#)
DOCX, 34.56 KB
- [b](#)
TXT, 1 KB
- [d](#)
TXT, 1 KB
- [c](#)
TXT, 1 KB
- [a](#)
TXT, 1 KB

**Volunteer Resource
Centre**



Information, toolkits, templates, best practice, presentations, and event ideas for Volunteer Members.

[Discover how the VRC can help you](#)

[Contact us](#) | [Site map](#) | [Site help](#) | [Privacy policy & disclaimer](#)

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You can “fine tune” your list by selecting the amount of documents you wish to be displayed per page and whether you would like icons to be displayed.

Table

The documents and files are displayed in a table, containing file names, file types, file sizes, date of upload of files, and a Download link.

Select the checkbox, if you want to display document and file icons in the table next to the Download link.

Example:

**Institution of
MECHANICAL
ENGINEERS**

Improving the world through engineering

[Home](#) | [About us](#) | [Events](#) | [Knowledge](#) | [Learning & development](#) | [Membership & registration](#) | [Near you](#) | [News](#) | [Services](#) | [Students & apprentices](#)

[↑ Home](#)
[↑ Example Website](#)
[- Events](#)
[- Twitter](#)

Documentation

FILE	TYPE	SIZE	UPLOADED ON	DOWNLOAD
Near You visits - April 2012 first 500	PDF	291.96 KB	31 May, 2012	Download PDF
Near You Top Tips	DOC	25.50 KB	31 May, 2012	Download DOC
Near You Hits April 2012	XML	201.72 KB	31 May, 2012	Download XML
Imechenetwork best practice guide (1)	DOCX	34.56 KB	25 May, 2012	Download DOCX
IMechE Business Plan Objectives 2011 - 2015	PPTX	113.37 KB	25 May, 2012	Download PPTX
Regional Quarterly Reporting Form 2012 (4)	XLSX	16.63 KB	25 May, 2012	Download XLSX
Imechenetwork best practice guide	DOCX	34.56 KB	25 May, 2012	Download DOCX
b	TXT	1 KB	14 Oct, 2011	Download TXT
d	TXT	1 KB	14 Oct, 2011	Download TXT
c	TXT	1 KB	14 Oct, 2011	Download TXT
a	TXT	1 KB	14 Oct, 2011	Download TXT

Volunteer Resource Centre



Information, toolkits, templates, best practice, presentations, and event ideas for Volunteer Members.

[Discover how the VRC can help you](#)

[Contact us](#) | [Site map](#) | [Site help](#) | [Privacy policy & disclaimer](#)

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List+Detail page

Selecting this option will give you a bullet point list of documents.

You can “fine tune” your list by selecting the amount of documents you wish to be displayed per page and you would like the position of the download link to appear on the detail page.

Example

**Institution of
MECHANICAL
ENGINEERS**

Improving the world through engineering

[Home](#) | [About us](#) | [Events](#) | [Knowledge](#) | [Learning & development](#) | [Membership & registration](#) | [Near you](#) | [News](#) | [Services](#) | [Students & apprentices](#)

↑ Home

↑ Example Website


– Events

– Twitter

Documentation

- [Near You visits - April 2012 first 500](#)
- [Near You Top Tips](#)
- [Near You Hits April 2012](#)
- [Imechenetwork best practice guide \(1\)](#)
- [IMechE Business Plan Objectives 2011 - 2015](#)
- [Regional Quarterly Reporting Form 2012 \(4\)](#)
- [Imechenetwork best practice guide](#)
- [b](#)
- [d](#)
- [c](#)
- [a](#)

**Volunteer Resource
Centre**



Information, toolkits, templates, best practice, presentations, and event ideas for Volunteer Members.

[Discover how the VRC can help you](#)

[Contact us](#) | [Site map](#) | [Site help](#) | [Privacy policy & disclaimer](#)

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Clicking the document link will display a details page containing the name of the file, the link for downloading the file, the file type and file.

Example

**Institution of
MECHANICAL
ENGINEERS**

Improving the world through engineering

Home | About us | Events | Knowledge | Learning & development | Membership & registration | Near you | News | Services | Students & apprentices

↑ Home

↑ Example Website

– Events

– Twitter

Documentation


Near You visits - April 2012 first 500

Download

PDF, 291.96 KB

First 500 page visits for the Near You website - April 2012

Volunteer Resource
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Information, toolkits,
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Table+Detail page

The documents and files are displayed in a table, containing hyperlinked file names, file types, file sizes, date of upload of files, and a Download link.

Example

Institution of
**MECHANICAL
ENGINEERS**

Improving the world through engineering

Home | About us | Events | Knowledge | Learning & development | Membership & registration | Near you | News | Services | Students & apprentices

↑ Home

↑ Example Website


– Events

– Twitter

Documentation

FILE	TYPE	SIZE	UPLOADED ON	DOWNLOAD
Near You visits - April 2012 first 500	PDF	291.96 KB	31 May, 2012	Download
Near You Top Tips	DOC	25.50 KB	31 May, 2012	Download
Near You Hits April 2012	XML	201.72 KB	31 May, 2012	Download
Imechenetwork best practice guide (1)	DOCX	34.56 KB	25 May, 2012	Download
IMechE Business Plan Objectives 2011 - 2015	PPTX	113.37 KB	25 May, 2012	Download
Regional Quarterly Reporting Form 2012 (4)	XLSX	16.63 KB	25 May, 2012	Download
Imechenetwork best practice guide	DOCX	34.56 KB	25 May, 2012	Download
b	TXT	1 KB	14 Oct, 2011	Download
d	TXT	1 KB	14 Oct, 2011	Download
c	TXT	1 KB	14 Oct, 2011	Download
a	TXT	1 KB	14 Oct, 2011	Download

Volunteer Resource
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Select the checkbox, if you want to display document and file icons in the table next to the Download link.

You can “fine tune” your list by selecting the amount of documents you wish to be displayed per page and you would like the position of the download link to appear on the detail page.

TIP: You can filter and sort the documents and files by using the Sort documents and files drop down.

TIP: If you have added description of the document or file, it is displayed as tooltip text when you hover over the name of the document or file.

Institution of Mechanical Engineers

Page 36

TIP: Click the “Preview” button to view your web page as it would appear in a web browser, without publishing it to the Near You website.

Once you are happy with your selection, click the **“Publish”** button.

How to embed a Social Media page

FACEBOOK


[Create a page in the usual way](#) naming it "Facebook"

Drag and drop an Auto Page Widget onto the page to give your page a title

Next drag and drop a JavaScript widget onto the page. This can be found under **"Scripts and Styles"**.

Click Edit

The following screen will be displayed:



The screenshot shows a 'JavaScript' configuration window with a close button (X) in the top right corner. It contains two main options: 'Link to a JavaScript file (.js)' and 'Write JavaScript'. Below these is a 'URL' section with a text input field and a 'Select...' button. Further down is a section titled 'Where to include in HTML?' with three radio button options: 'In the head tag' (which is selected), 'Where the widget is dropped', and 'Before the closing body tag'. At the bottom, there are 'Save' and 'Cancel' buttons, with the 'Save' button featuring a green checkmark icon.

Click the "Write JavaScript" option

The following screen will be displayed:

Java Script

[Link to a JavaScript file \(.js\)](#)

Write JavaScript

1

Tips

Do not add `<script>` tag, it will be added automatically. Start writing your JavaScript directly.


Example:
`var str = "Hello World!";`

Where to include in HTML?

☒ In the head tag

☐ Where the widget is dropped

☐ Before the closing body tag

 Save

 or

Cancel

Copy and paste the following JavaScript into the text field

```
(function(d, s, id) {  
  var js, fjs = d.getElementsByTagName(s)[0];  
  if (d.getElementById(id)) return;  
  js = d.createElement(s); js.id = id;  
  js.src = "//connect.facebook.net/en_GB/all.js#xfbml=1";  
  fjs.parentNode.insertBefore(js, fjs);  
}(document, 'script', 'facebook-jssdk));
```

Make sure that the "Before the closing body tag" option is selected

Click the Save button

Drag and drop a **content block** widget onto the page

Click Edit

Click HTML

Paste the following HTML into the text field

```
<div id="fb-root"></div>
```

```
<div class="fb-like-box" data-href="http://en-  
gb.facebook.com/IMechE.GLR?v=info" data-width="572" data-show-  
faces="true" data-stream="true" data-header="true"></div>
```

TIP: The data-href link must be the web address of your Facebook page.

Click the Save button

Click the Preview button to check that the page is working correctly

Once you are happy with it, click the Publish Page button

TWITTER

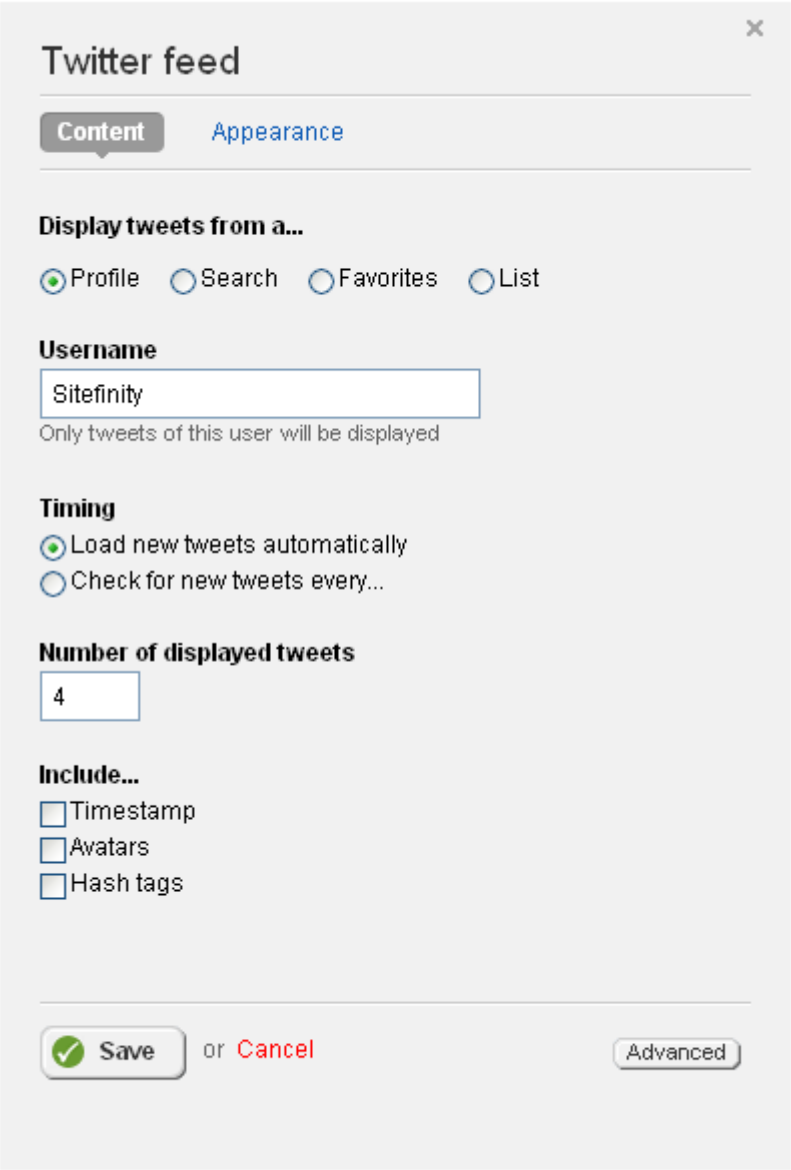
[Create a page in the usual way](#) naming it "Twitter"

Drag and drop an **Auto Page Widget** onto the page to give your page a title

Next drag and drop a **Twitter feed widget** onto the page. This can be found under **Social**

Click Edit

The following screen will be displayed:



The screenshot shows a configuration window titled "Twitter feed" with a close button (X) in the top right corner. The window has two tabs: "Content" (selected) and "Appearance". Under the "Content" tab, there are several sections: "Display tweets from a..." with radio buttons for Profile (selected), Search, Favorites, and List; "Username" with a text input field containing "Sitefinity" and a note "Only tweets of this user will be displayed"; "Timing" with radio buttons for "Load new tweets automatically" (selected) and "Check for new tweets every..."; "Number of displayed tweets" with a text input field containing "4"; and "Include..." with checkboxes for "Timestamp", "Avatars", and "Hash tags". At the bottom, there are three buttons: a green "Save" button with a checkmark, a red "Cancel" button, and an "Advanced" button.

Insert your Twitter username into the Username field.

Click the Save button

Click the Publish Page button

PLEASE NOTE: The Preview option currently doesn't work correctly with this widget.

Other available options are:

Favorites

Displays the favorite feeds from a particular user.

List

Displays the Twitter list of a particular user.

In Title and Subtitle input fields, enter the title and the caption of the Twitter feed window.

Choose how often to refresh the Twitter feed, by selecting one of the following:

Load new tweets automatically - Refresh the Twitter feed every time when a new feed is published.

Check for new tweets every - Select the time interval on which to refresh the Twitter feed.

Choose how many tweets to display in the feed, by entering the number in Number of displayed tweets input field.

Choose what to display with the feeds, by selecting one or more of the following checkboxes:

- Timestamp
- Avatars
- Hash tags

Appearance

On this tab, choose how the tweets will look like.

Choose the size of the feed, by selecting one of the following:

Auto - The feed window is automatically sized.

Fixed -Enter the size of the feed window in pixels and choose whether the scrollbar is included in these sizes or not.

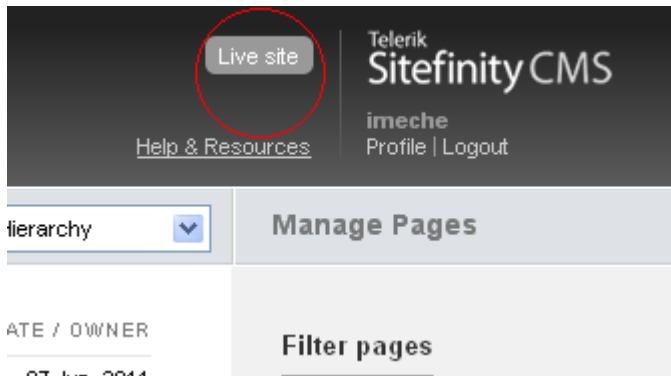
Choose the colour scheme of the twitter feed by selecting one of the following:

Default - The feed is displayed in its default Twitter colours.

Custom - For each element of the feed widow, choose the color from the colour pickers.

Editing pages directly from the website

To edit pages directly from the Near You website click the “Live site” button which is situated at the top right of the page.



Your page will appear as normal but with the addition of a tools icon which is situated on the RHS of the page (below)



Navigate to page you wish to edit and click the tools icon - to edit the page directly

PLEASE NOTE: You will only be able to edit pages that you have editing rights for.

TIP: Access your pages more efficiently by bookmarking them and then opening them once you have logged into Sitefinity.

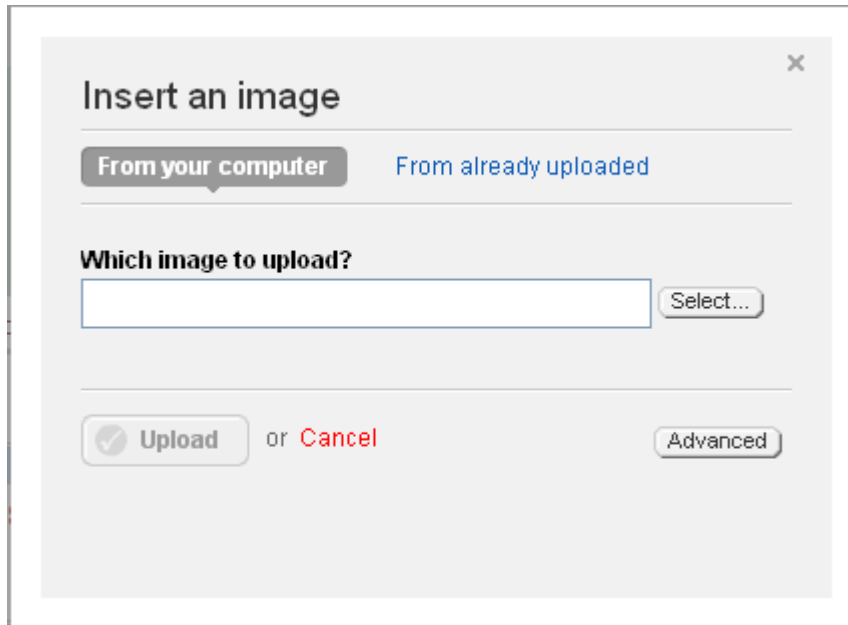
Image

How to insert an Image onto a page

[Edit your page](#) or [create your page](#) in the usual way.

Drag and drop the Image widget onto the page.

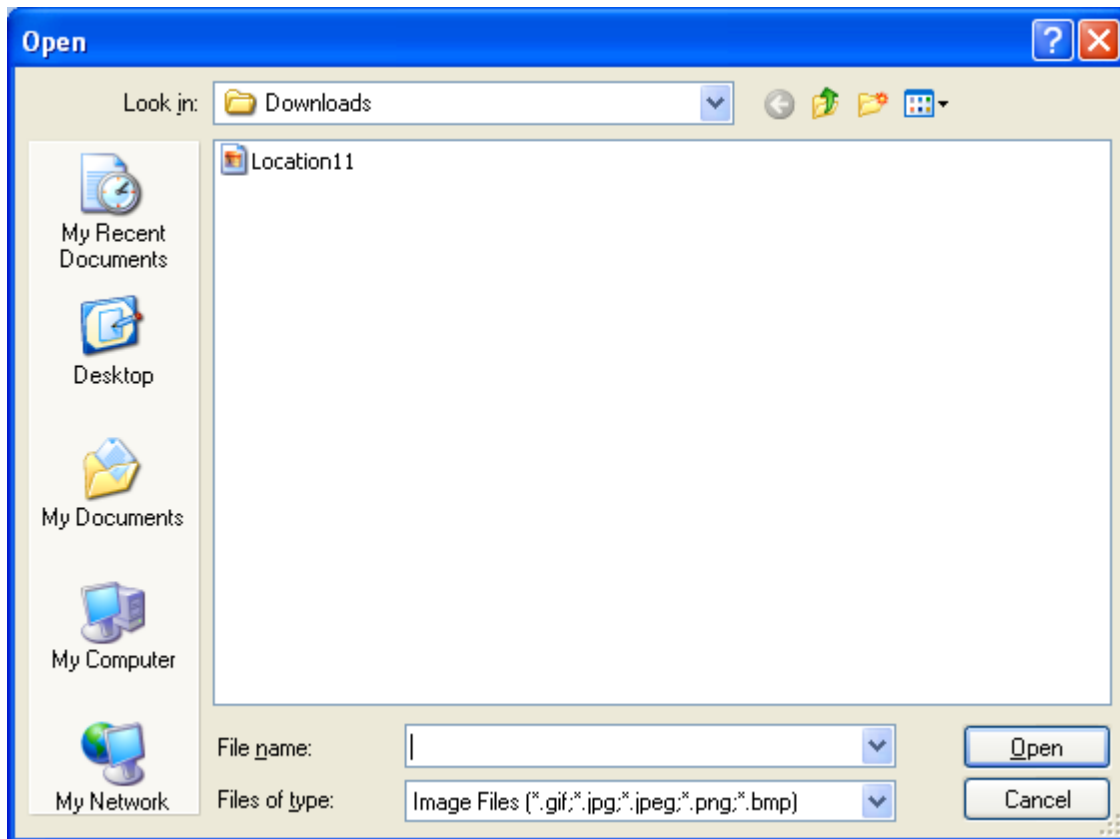
Click edit on the Image widget or click Select an image ; you will be presented with the following pop-up:



The default option allows you to select an image from your computer

Click the "Select..." button

The following pop up will appear:



Navigate to where the images are stored on your computer

Click the image you wish to upload

Click the “Open” button

PLEASE NOTE: It is important that you name your images descriptively. For example, fred_bloggs.jpg and not img123456.jpg.

The pop up will close and the image you selected will be transferred to the **“Which image to upload?”** text field.

Select an appropriate Image Library from the **“Where to store the updated image?”** dropdown list or Create a new library to store the image in.

TIP: Search for items in a dropdown list more efficiently by typing the first letter(s) of the item you are searching for.

Click the “Upload” button

The following screen will appear:



Insert an image ✕



Type: .jpg
File Size: 1 MB
Uploaded on: Wednesday, May 30, 2012

[Change Image](#) [Crop/Resize/Rotate...](#)

Title *(also displayed as a tooltip by modern browsers)*

Alternative text *(for visually impaired people and search engines)*

Image Size
 ▼

☐ Clicking the resized image opens the image in its original size

[Save](#) or [Cancel](#) [Advanced](#)

You can amend the properties of the image on this screen. For example, you can change the title of the image, add alternative text or change the image size from a list of preset dimensions or choose your own custom size. You can also choose to expand the image to its original size by selecting the “Clicking the resized image..” checkbox.

Click the “Save” button and the image will be inserted onto your webpage

Click the “Publish” button

Image Gallery

If you have several images to insert into a web page, use the Image Gallery widget. For best results, use the **Thumbnail strip + Image on the same page** option.

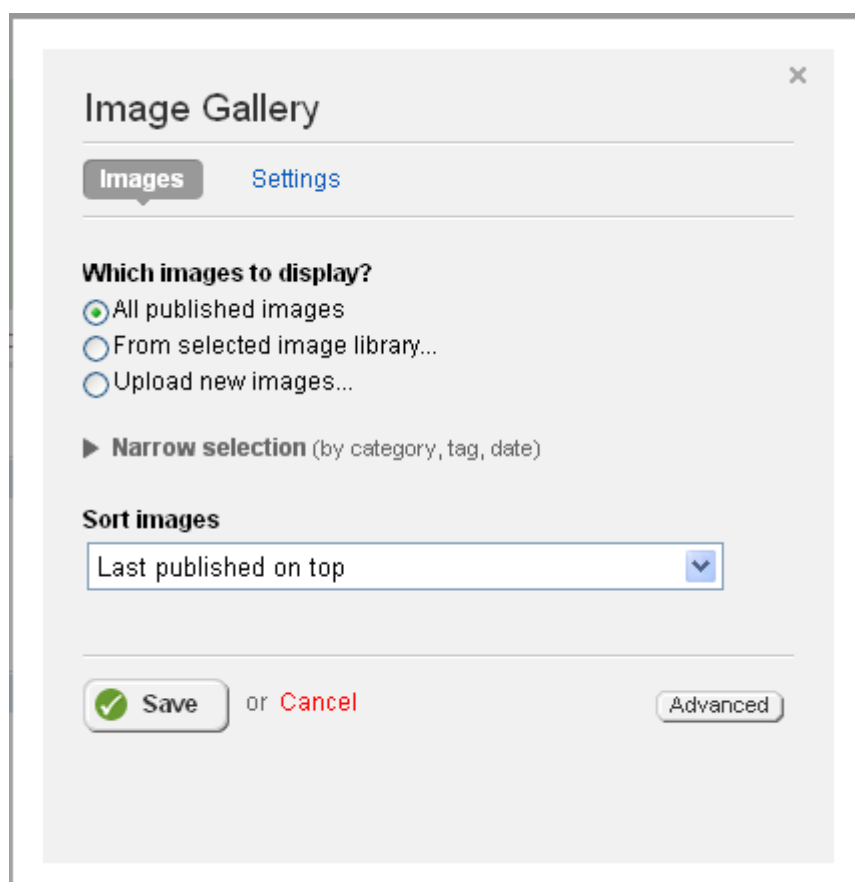
How to create an Image Gallery

[Edit your page](#) or [create your page](#) in the usual way

Drag and drop the Image Gallery widget onto the page

Please Note: - The Image Gallery widget's default setting will initially display ALL images that have been uploaded to Sitefinity. You will need to select the appropriate image album for your Area by the following actions:

2. Click edit on the Image gallery widget; you will be presented with the following pop-up



Change the **"Which images to display"** setting from **"All published images"** to either:

From selected image library

If you select this option, you will need to select an Image Library that has already been created. You can narrow your search by typing the name of the Image Library you wish to use into the Search Box. Click the Image Library you wish to use and click the **"Done selecting"** button.

Upload new images

Select this option to upload new images onto the system. You can upload new images into an existing Image Library, or create a brand new Image Library to upload your images into.

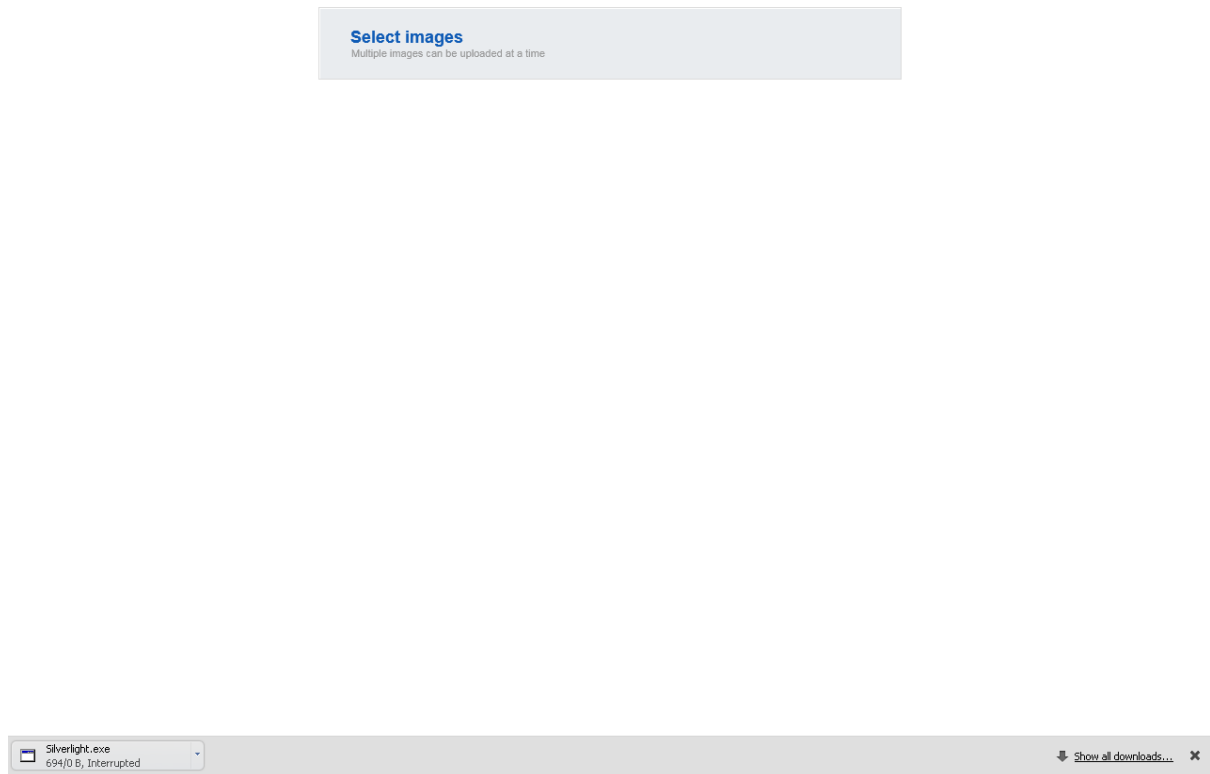
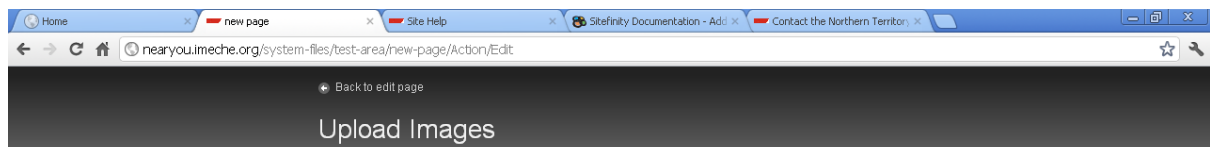
Narrow selection

Use Categories or Tags to select images that are stored in a single document library. You will need to give your images a Category or Tag to use this option.

To upload an image:

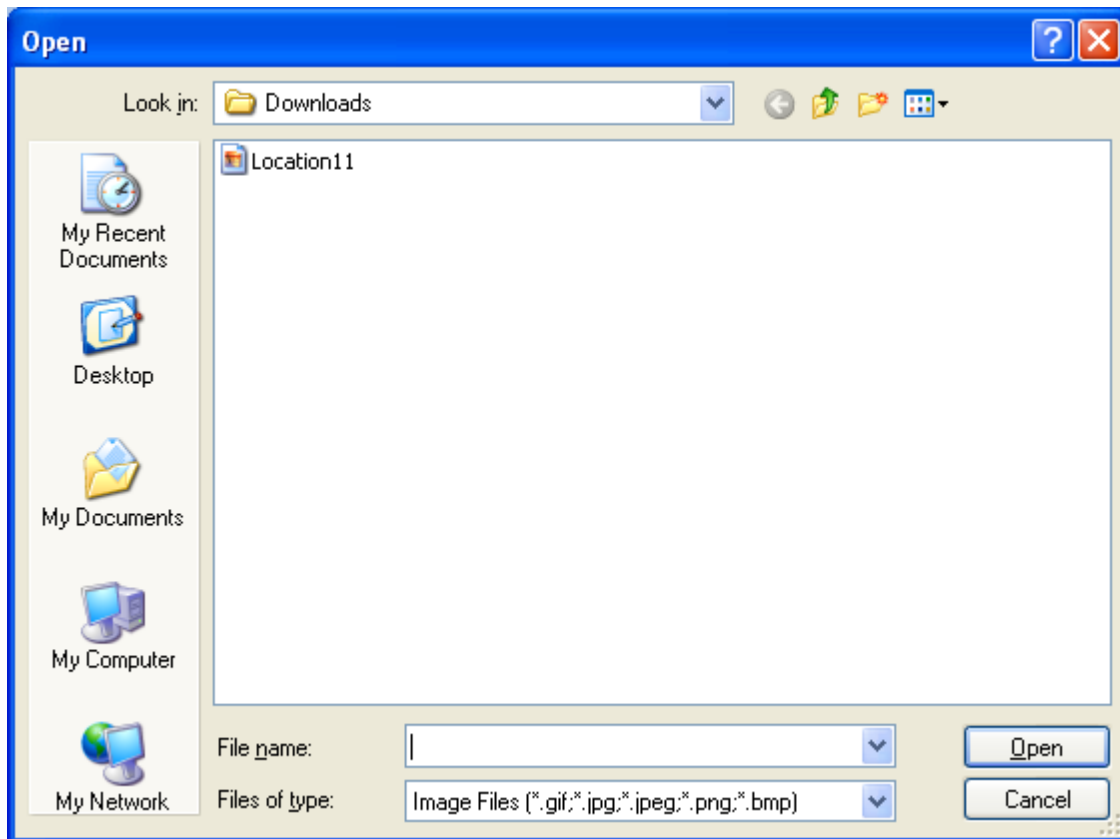
Click the 'Upload' button

The following screen will appear:



Click "Select images"

The following pop up will appear:



Navigate to where the images are stored on your computer

Click the image you wish to upload

TIP: - You can select multiple images by holding down the <Ctrl> key and clicking the images you wish to upload

Click the "Open" button

PLEASE NOTE: It is important to name your contact images descriptively. For example, fred-bloggs.jpg and not img12345.jpg.

The pop up will close and the images you selected will be transferred to the Upload Images screen (example below):

content-popup.png5.10 KB✕

create_a_contact_button.png1.39 KB✕

image-gallery-popup.png12.93 KB✕

[Add more](#)

Where to store the uploaded images?

-- select an image library --

or [Create a new library](#)

► Categories and tags

✓ Upload and Publish

✓ Upload and Save as Draft

or [Go back](#)

Preview

TIP: You can remove any images you may have erroneously uploaded by clicking the 'X' icon next to that image.

TIP: You can add more images to the ones you may have already uploaded by clicking the "Add more" link and repeating the above procedure.

Select whether you would like to upload your images to an existing Image Library or a new Image Library

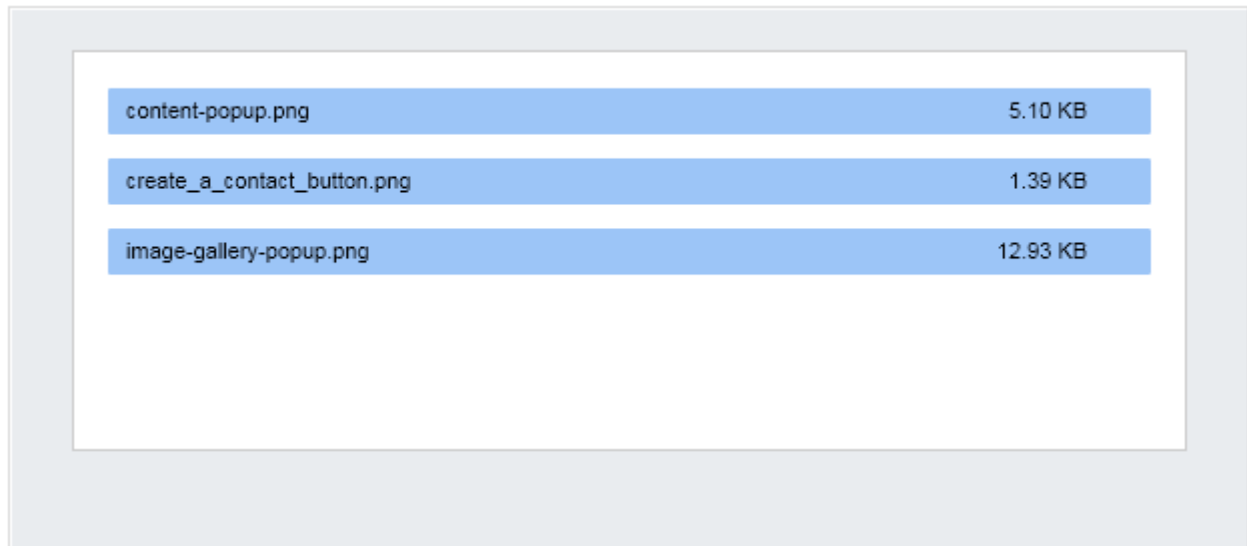
To store images in an existing Image Library

Select an appropriate Image Library from the "**Where to store the updated images?**" dropdown list

TIP: Search for items in a dropdown list more efficiently by typing the first letter(s) of the item you are searching for.

Click the "Upload and Publish" button

A message telling you that your images have been successfully uploaded should appear (below)



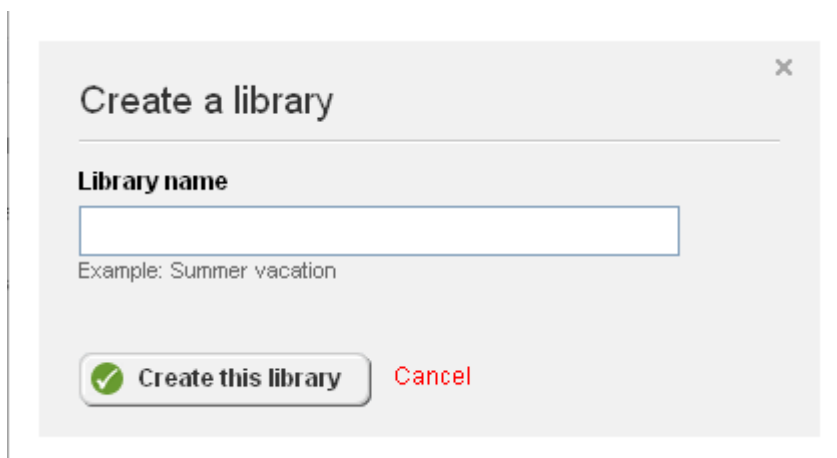
3 images have been successfully uploaded

[Back to edit page](#) or [Upload more images](#)

To store images in a new Image Library

Click the "Create a new library" link

The following pop up will be displayed:



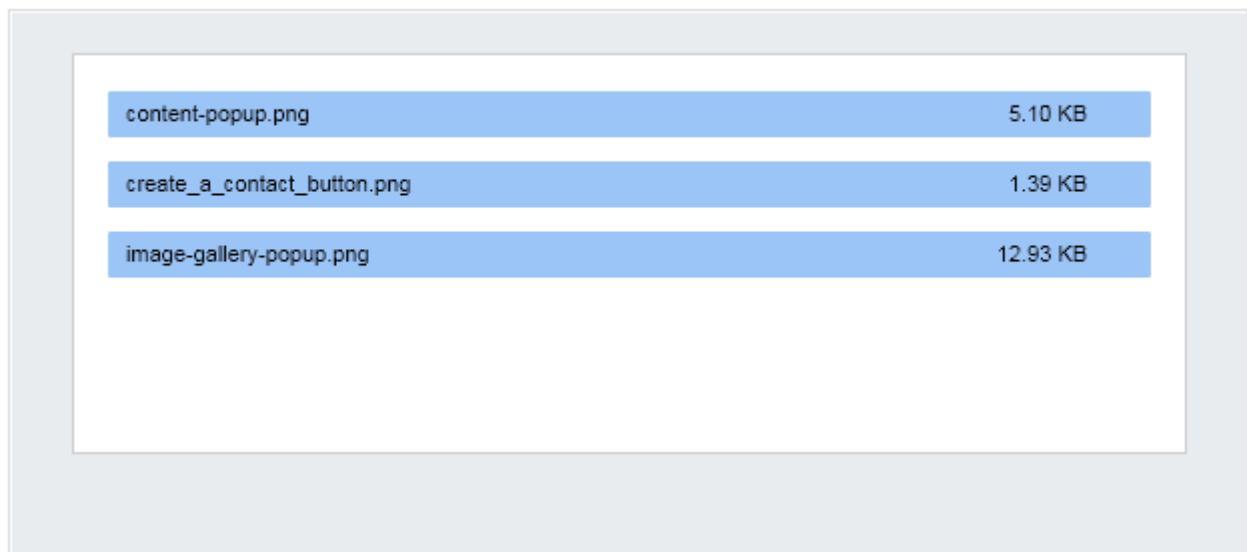
Type the name of your library into the “Library name” field and click the “Create this library” button

TIP: - For ease of navigation, the user must adhere to the following naming convention; If they are a member of the Eastern Young Members Panel, then all new photo albums should have the naming convention of: Eastern Young Members Panel (followed by a space dash space) – (followed by the name of the event). For example: - Eastern Young Members Panel - Kingsnorth Power Station Visit. **Please note:** - Sitefinity does not allow you to nest folders, hence the importance of proper naming conventions.

Select your newly created Image Library from the **“Where to store the updated images?”** dropdown list

Click the “Upload and Publish” button

A message telling you that your images have been successfully uploaded should appear (below)



3 images have been successfully uploaded

[Back to edit page](#) or [Upload more images](#)

Click the “Back to edit page” button to return to Image Gallery popup or choose to [upload more images](#)

To choose a setting for your Image Gallery

Click the "Settings" link

The following screen will appear:

Image Gallery

Images **Settings**

1 Select image gallery type

- ☒ Thumbnails + Detail page
- ☐ Thumbnails + Overlay (lightbox)
- ☐ Thumbnail strip + Image on the same page
- ☐ Simple list

2 Fine tune the selected type

- ☒ **Use paging**
Divide the thumbnail list on pages up to
- ☐ **Use limit**
Show only limited number of items:
- ☐ **No limit and paging**
Show all published items at once

☐ Show links to the previous and the next image as...

[Edit Thumbnail list template](#)

[Edit Detail page template](#)

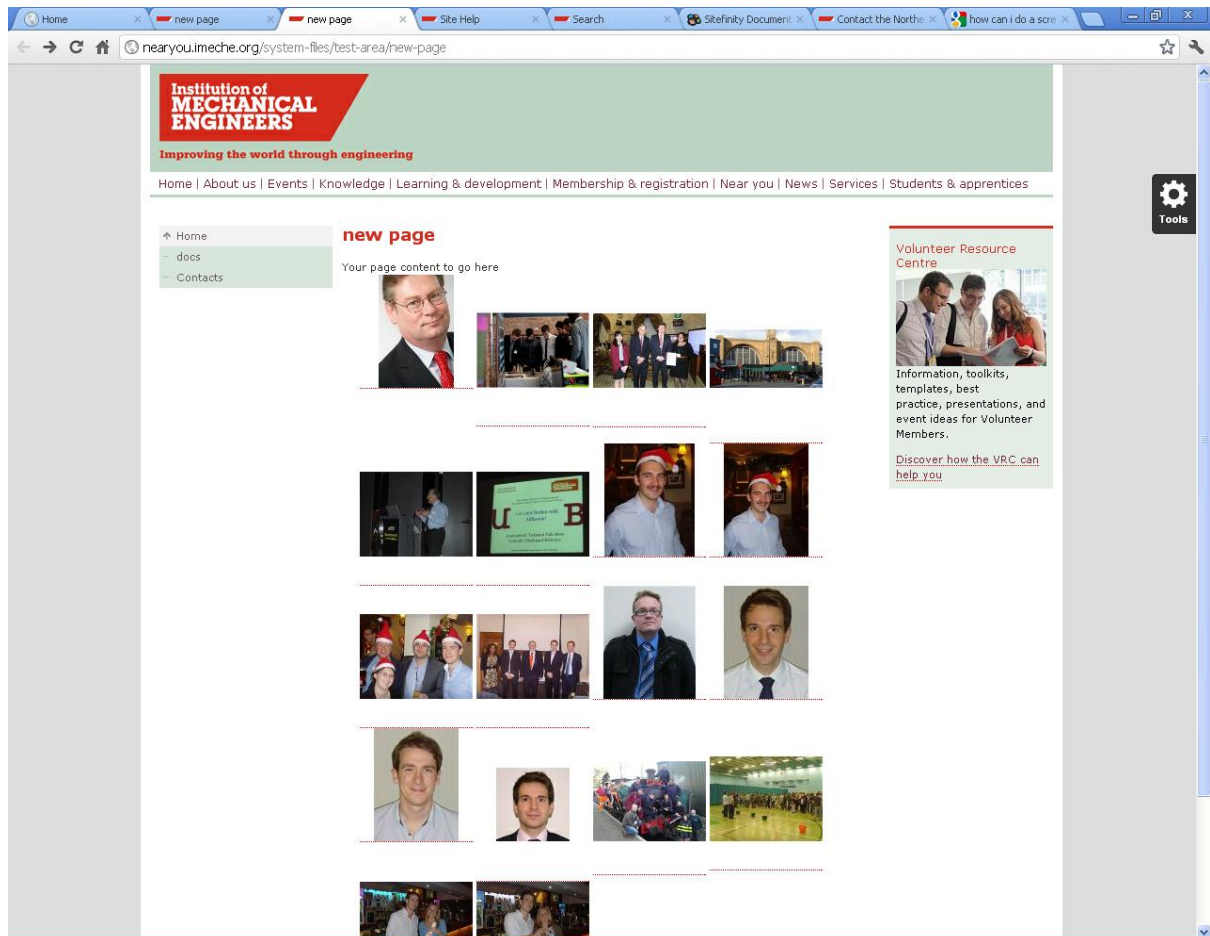
☐ Enable social share buttons [Details](#)

or [Cancel](#) [Advanced](#)

You can select one from the following Image Gallery types:

Thumbnails + Detail page

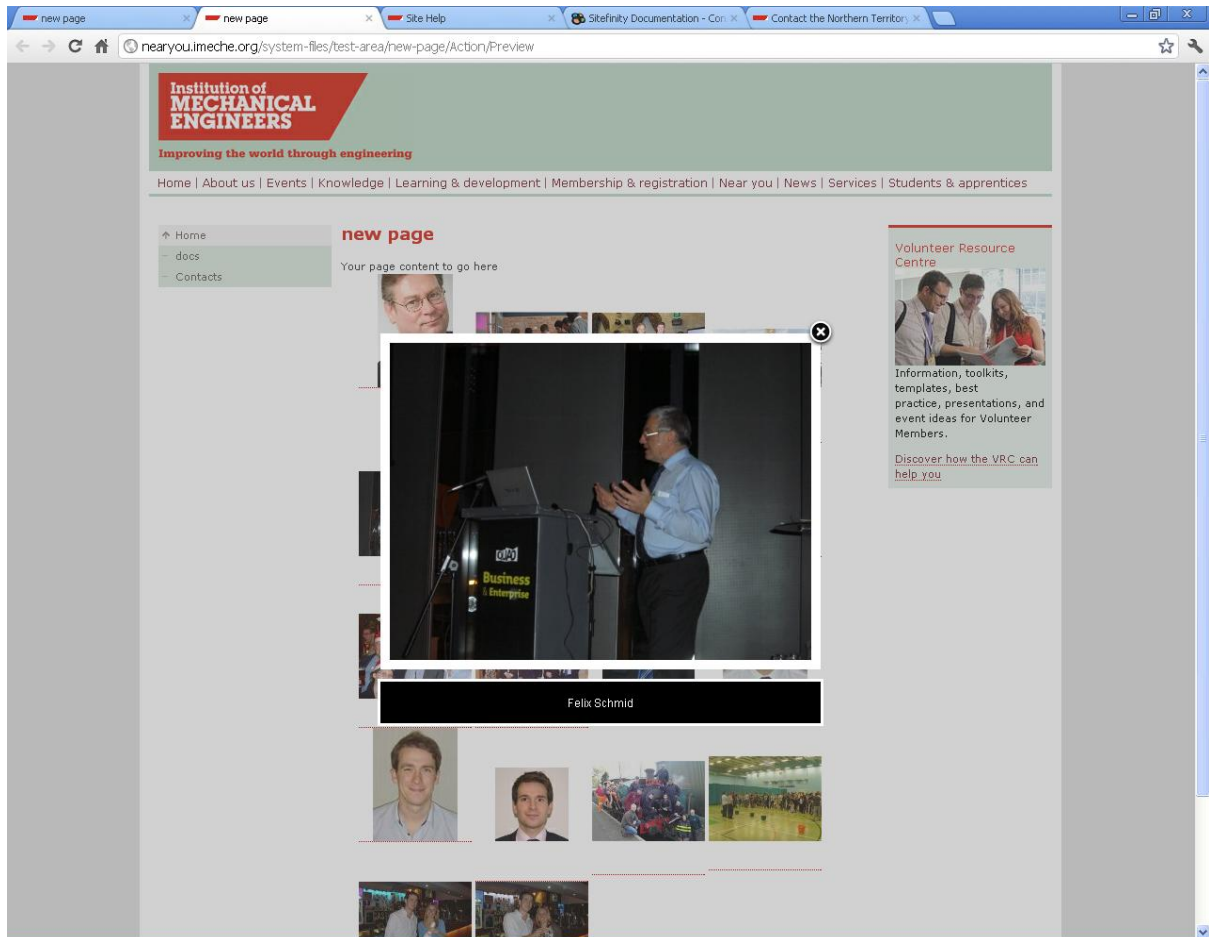
This Image Gallery displays the images as thumbnails. The description of the images is displayed in tooltip text. When clicked, the image is displayed in a bigger size in the same page together with image title, the user that has uploaded the image, the date of upload, and the description.



You can “fine tune” your list by selecting the number of images you wish to be displayed per page and whether you would like links to the previous and next image to be displayed. You can also enable “Social Share” buttons.

Thumbnails + Overlay (lightbox)

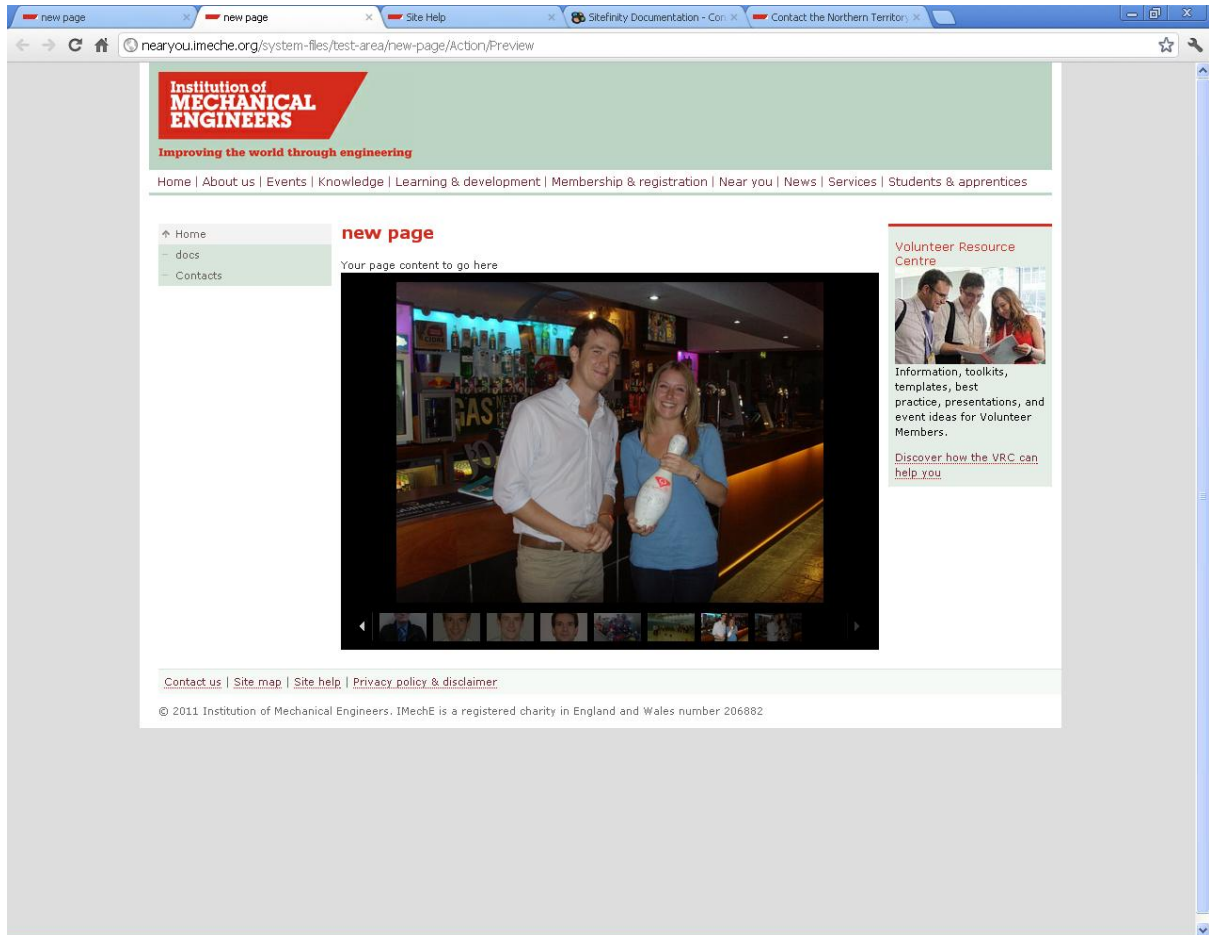
The image gallery displays the images as thumbnails. The description of the images is displayed in tooltip text. When clicked, the image is displayed in a bigger size as an overlay of the page together with its description.



You can “fine tune” your list by selecting the number of images you wish to be displayed per page. You can also enable “Social Share” buttons.

Thumbnail strip + Image on the same page

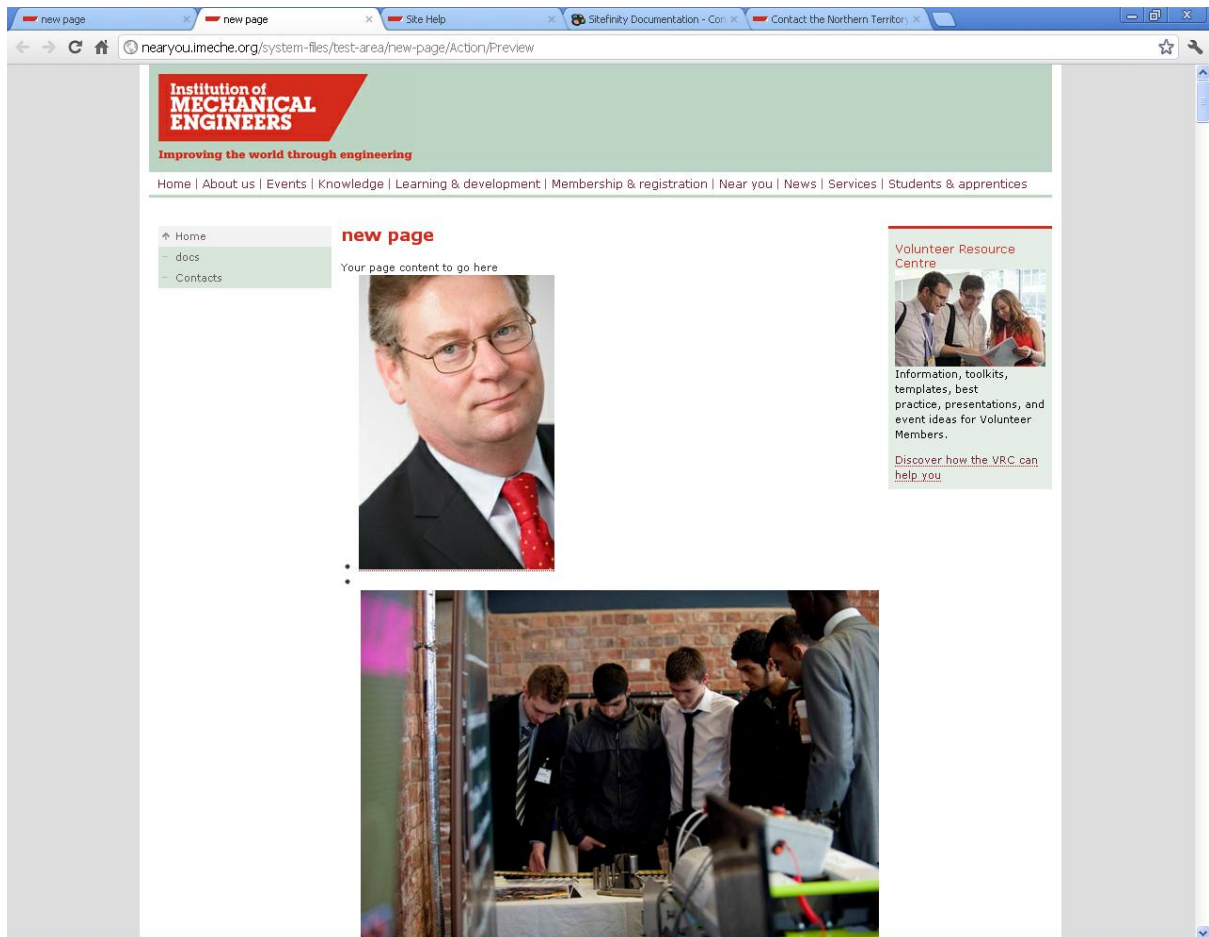
The image gallery displays a horizontal strip of image thumbnails. When you click an image from the strip, a preview of the image is displayed above the thumbnail strip.



You can “fine tune” your list by selecting the number of images you wish to be displayed per page and whether you would like links to the previous and next image to be displayed. You can also enable “Social Share” buttons.

Simple list

All images are displayed in a large size. The description of the images is displayed in tooltip text.



You can “fine tune” your list by selecting the number of images you wish to be displayed per page. You can also enable “Social Share” buttons.

TIP: - Use the alt tag to get a description of each image on the slideshow.

TIP: Click the “Preview” button to view your web page as it would appear in a web browser, without publishing it to the Near You website.

Once you are happy with your selection, click the **“Publish”** button

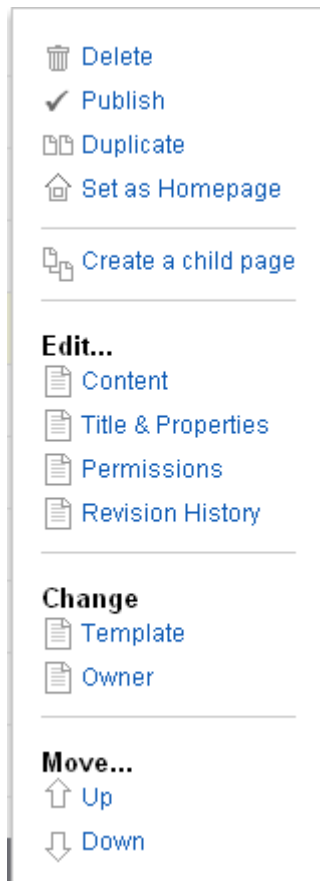
Edit an Existing Page

Navigate to the section of the website you are entitled to edit.

Click the checkbox next to the page you wish to edit.

Click 'Actions'

The following pop up will appear



This comprises of the following options:

Delete – Click this option to delete a page. Once clicked, you will be presented with a further pop-up asking you to confirm your selection. Press the 'Yes, Delete this item' button or press cancel.

Publish – Click this option to publish a page to the Near You website.

Duplicate – Click this option to duplicate a page. Once you have chosen this option you will be presented with the Create a page screen (below).

Change the name of the page and [create the page](#) as you would normally

Set as Homepage – This option can only be used by Sitefinity Administrators

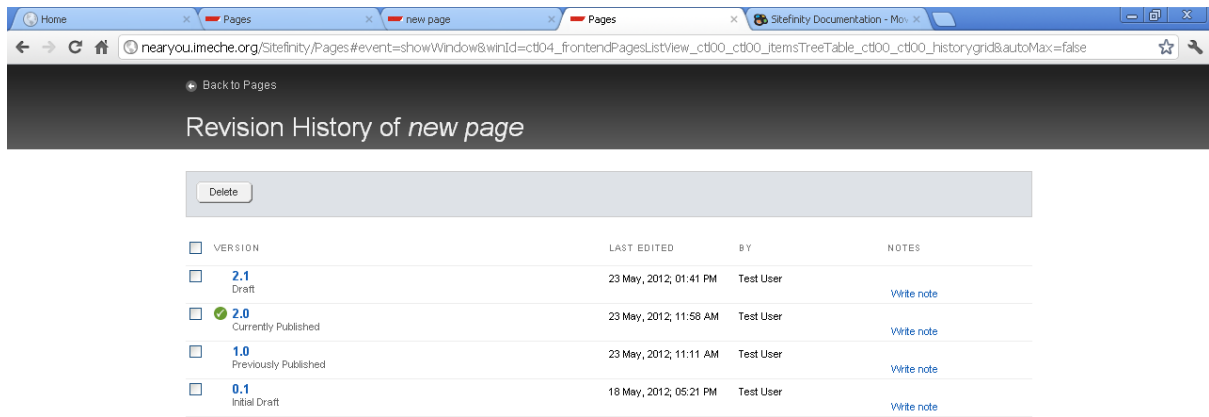
Create a child page – Click this option to create a child page (nested page) of a Group Page. If doing this make sure that you have selected this option against a Group page and not a standard page


Content – Click this option to [edit the content](#) of a page

Title & Properties – Click this option to edit the [title and properties](#) of a page

Permissions - This option can only be used by Sitefinity Administrators

Revision History – Click this option to change the revision history of a page. The Revision History page appears, containing a list of all versions of the page:



In case the page has been published, the system indicates which version of the page is published, by displaying  next to this version.

You can view a previous version of the page by clicking the version. A preview of the page opens. You can revert to a previous version of the page by clicking "Revert to this version" button in the upper-left corner of the page.

The system makes the selected version of the page the current one.

You can delete versions of the page, by selecting them and clicking "Delete"..

Please note: You cannot delete the version that is currently published.

You can add note to each version, by clicking the "Write note" link of the respective version. An input field appears where you enter and save the note.

The note is displayed in the "Revision History" page. You can edit and delete the note.

Template -Click this option to change the template of a page. **Please note:** This action should only be performed by experienced Website Officers.

Owner – This option can only be used by Sitefinity Administrators

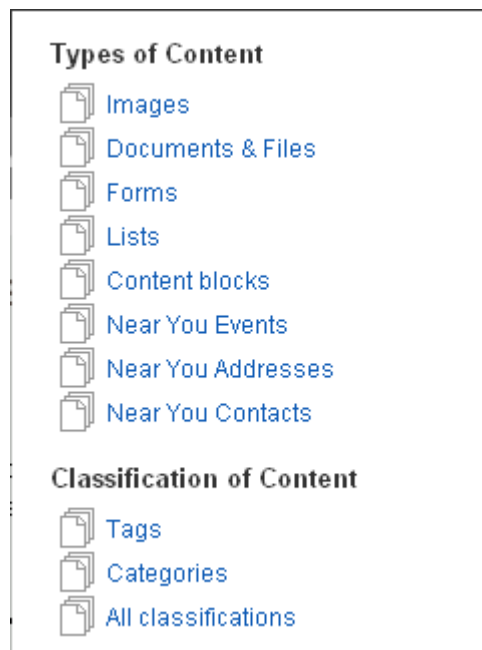
Move Up – Changes the order the page is displayed in the website navigation. Click to move the page up one position

Move Down - Changes the order the page is displayed in the website navigation. Click to move the page down one position

Content

The content modules are located under the content tab. Use the Content tab to create reusable content. Once you create an event, or other content item, it is stored on the Sitefinity Content Management System and other users can view, use, and edit this content. The content items are displayed on one or more pages of your website using widgets. Each content item has a widget that is used to display only that specific content item. For example, the events are displayed on the website using the Events List widget.

The content tab has the following dropdown menu



which comprises of the following modules:

TYPES OF CONTENT

Images – Click this option to upload and organise images, which you can then display on pages of the website individually or in galleries. You can also insert uploaded images in the text editor.

[Learn more](#)

Documents & Files – Click this option to upload and organize documents, links to which you can then display on pages of the website. You can also insert links to uploaded documents in the text editor.

[Learn more](#)

Forms – Use this content type to create custom web forms to be displayed on the Near You website.

[Learn more](#)

Lists - Use this content type to create lists and list items. You can use lists for various purposes. For example, you can create a list for your FAQ section.

[Learn more](#)

Content blocks - Use this content type to create content blocks when you need to display various kinds of nonspecific information (all information different than the predefined content types, such as news or event announcements). Content blocks are very useful when you need to create text that will be used on many pages of your website. For example, a company address.

You create content blocks using the text editor.

[Learn more](#)

Near You Events - Use this content type to create events to be announced on the website.

[Learn more](#)

Near You Addresses – Use this content type to create addresses for Near You Events

[Learn more](#)

Near You Contacts – Use this content type to create contacts for your particular Region or Area.

[Learn more](#)

CLASSIFICATION OF CONTENT

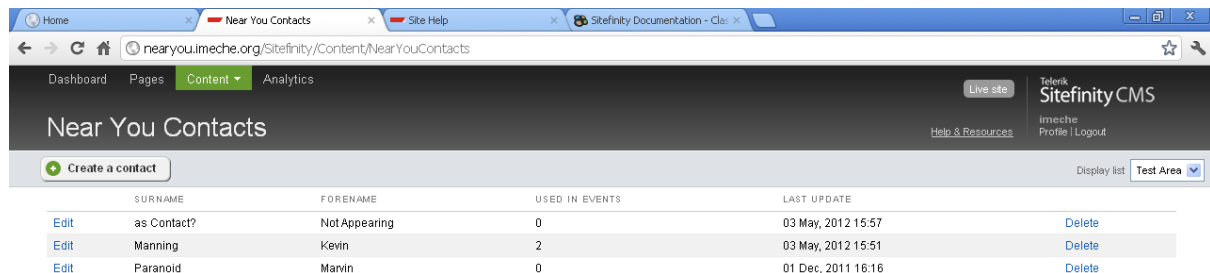
The Classifications widgets group contains widgets that you use to display lists of categories and tags on your website. You use the categories and the tags to filter the content of the pages.

Tags and Categories: – Use the these widgets to filter images or documents when using a Download List or an Image Gallery.

All classifications – This lists all classifications

Near You Contacts

Click the 'Content' link at the top of the page
Select 'Near You Contacts' from the 'Types of Content' dropdown list
You will be presented with the following screen, which will contain a list of Contacts for your specific Area(s)



	SURNAME	FORENAME	USED IN EVENTS	LAST UPDATE	
Edit	as Contact?	Not Appearing	0	03 May, 2012 15:57	Delete
Edit	Manning	Kevin	2	03 May, 2012 15:51	Delete
Edit	Paranoid	Marvin	0	01 Dec, 2011 16:16	Delete

This screen comprises of the following items:

Create a contact button – Use this to create a new contact for the Near You website or for a Near You event

Display list – Use this to filter the contacts for the Areas you have editing rights for.

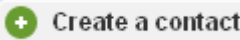
List of contacts for a particular Area – Displays the Surname, Forename, of individual contacts, the number of times they have been used in events and the date and time their information was last updated. Each record can be edited or deleted

TIP: You can sort the columns by clicking on their heading

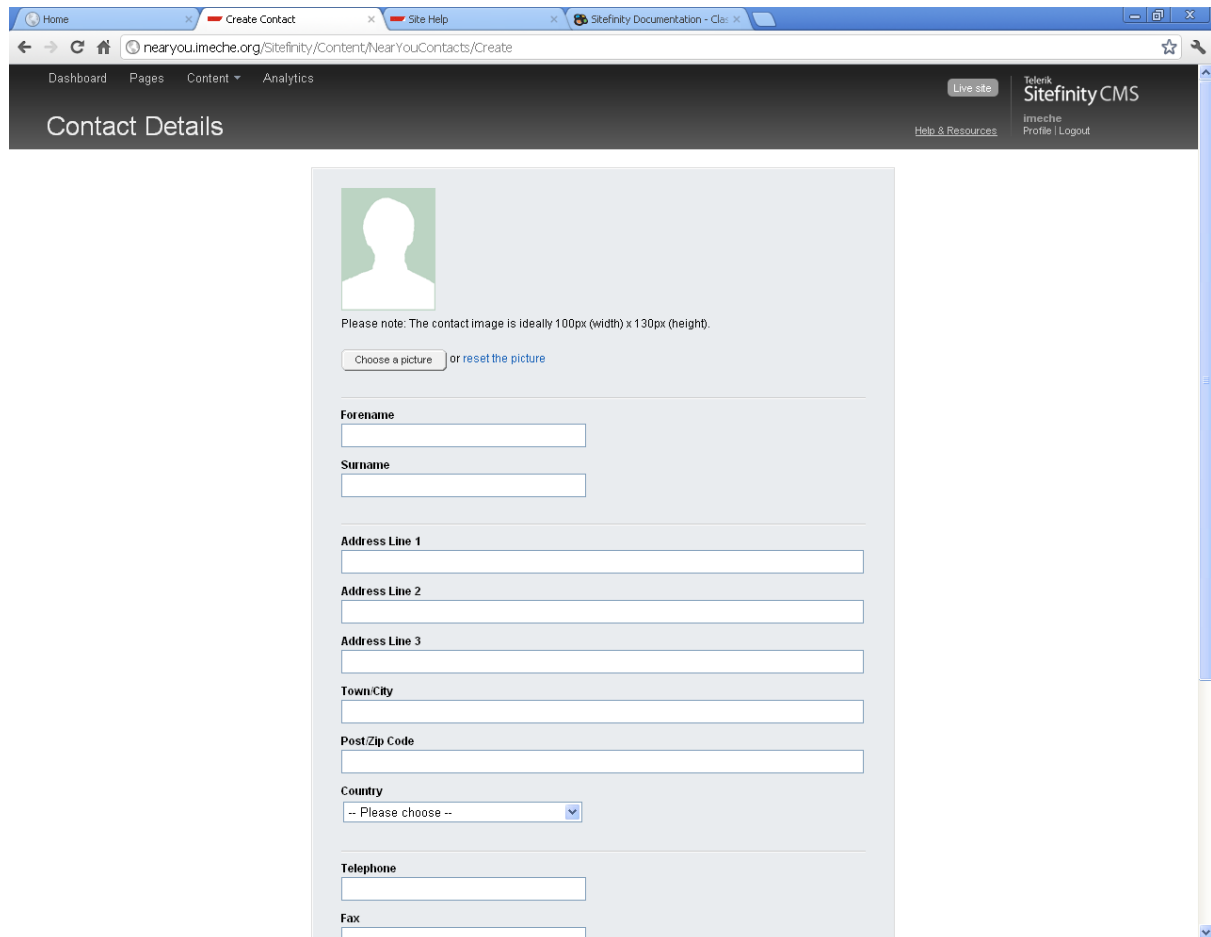
Create a Contact

Contacts can be created for Near You Events, a point of contact for your particular Area or Region or both.

Click the 'Create a Contact' button.



The following page will be displayed:

A screenshot of a web browser displaying the 'Create Contact' page. The browser's address bar shows the URL 'nearyou.imeche.org/Sitefinity/Content/NearYouContacts/Create'. The page has a dark header with navigation links: 'Dashboard', 'Pages', 'Content', and 'Analytics'. On the right side of the header, there is a 'Live site' button and a user profile section for 'Telenik Sitefinity CMS' with links for 'imeche Profile' and 'Logout'. The main content area is titled 'Contact Details' and contains a form. At the top of the form is a placeholder for a contact image, with a note stating: 'Please note: The contact image is ideally 100px (width) x 130px (height)'. Below this are two buttons: 'Choose a picture' and 'or reset the picture'. The form fields include: 'Forename', 'Surname', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Town/City', 'Post/Zip Code', 'Country' (a dropdown menu with '-- Please choose --' selected), 'Telephone', and 'Fax'.

Complete the relevant fields, making sure you select which Areas that you wish the contact to appear under

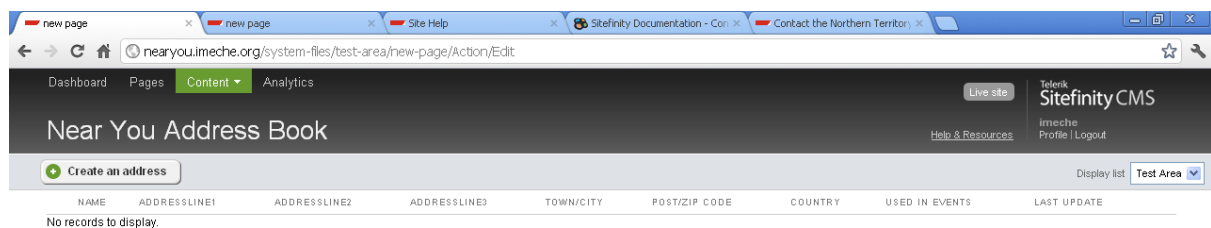
Click the 'Save Contact' button

Near You addresses

Click the 'Content' link at the top of the page

Select 'Near You Addresses' from the 'Types of Content' dropdown list. You will be presented with the following screen, which will contain a list of Addresses for your specific Area(s)

Near You Address Book



This screen comprises of the following items:

Create a address button – Use this to create a new address for a Near You event

[Learn more](#)

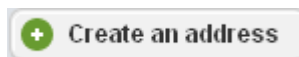
Display list – Use this to filter the Addresses for the Areas you have editing rights for.

List of Addresses for a particular Area – Displays the Name, Addressline1, Addressline2, Addressline3, Town/City, Post/ZIP Code and Country of individual addresses, the number of times they have been used in events and the date and time their information was last updated. Each record can be edited or deleted

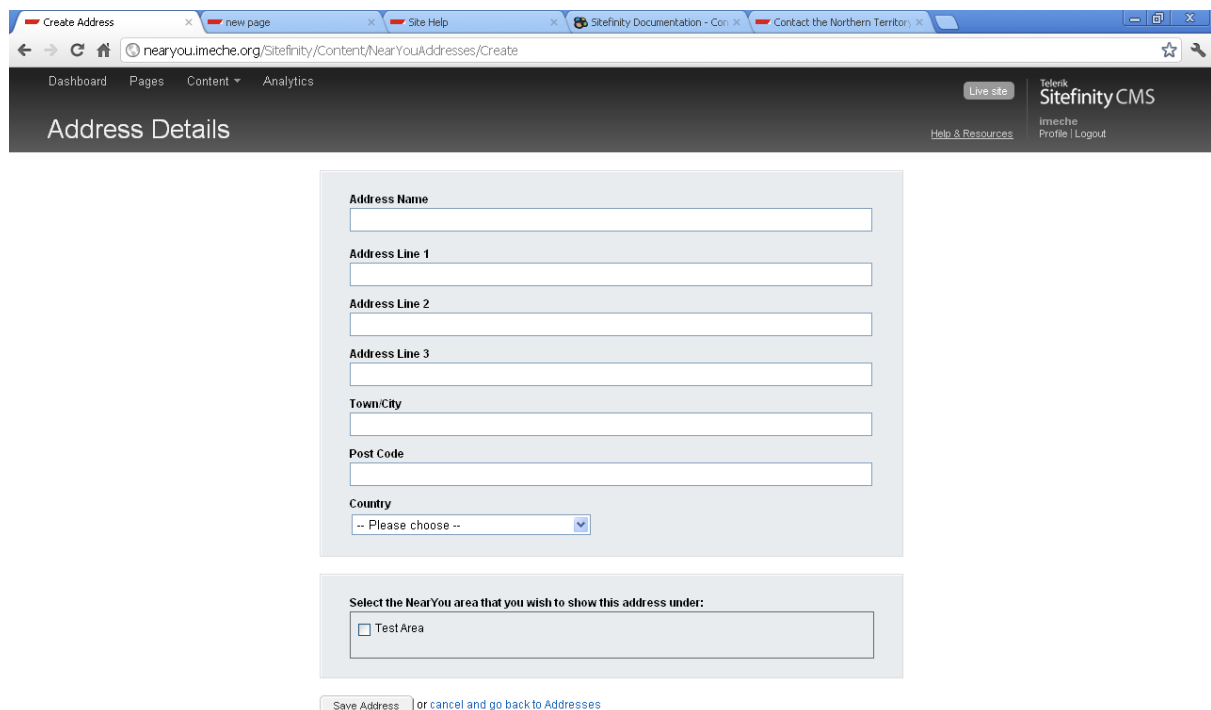
TIP: You can sort the columns by clicking on their heading

Create an Address

Click the 'Create an address' button.



You will be presented with the following screen:

The screenshot shows a web browser window with the URL 'nearyou.imeche.org/Sitefinity/Content/NearYouAddresses/Create'. The page has a dark header with navigation links: 'Dashboard', 'Pages', 'Content', and 'Analytics'. On the right, it says 'Live site' and 'Telerik Sitefinity CMS'. The main content area is titled 'Address Details' and contains a form with the following fields: 'Address Name', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Town/City', 'Post Code', and 'Country' (a dropdown menu with '-- Please choose --'). Below these fields is a section titled 'Select the NearYou area that you wish to show this address under:' with a checkbox labeled 'Test Area'. At the bottom, there are two buttons: 'Save Address' and 'or cancel and go back to Addresses'.

Complete the relevant fields, making sure you select which Areas that you wish the Address to appear under

Click the 'Save Address' button

TIP: Make sure that you enter the full address of the premises where the events are taking place, including postcode.

TIP: Enter a meaningful Address Name such as "Isaacs on the Quay – Ipswich".

TIP: Google the address of the premises to ensure that you get the correct or full address.

Near You Events

The 'Events' and 'Past Events' pages already have a 'widget' placed in them, which will display events you create automatically (and remove them at the appropriate time).

TIP: Before creating an Event, check that the contact and address you are planning to use for your Event exists on system.

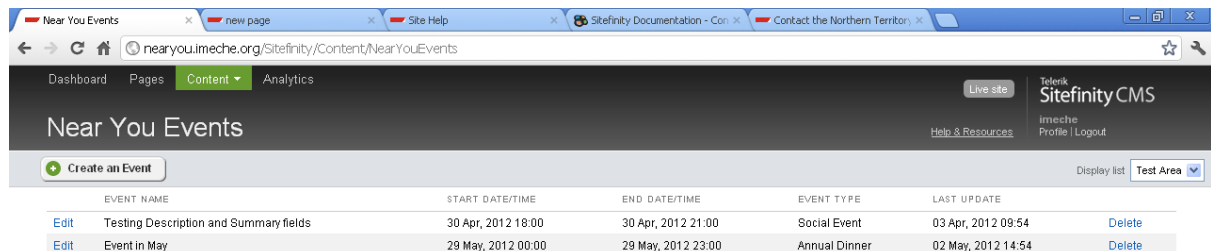
How to create an Event

Click the 'Content' link at the top of the page

Select 'Near You Events' from the 'Types of Content' dropdown list

You will be presented with the following screen, which will contain a list of Events for your specific Area(s)

Near You Events



EVENT NAME	START DATE/TIME	END DATE/TIME	EVENT TYPE	LAST UPDATE	
Edit Testing Description and Summary fields	30 Apr, 2012 18:00	30 Apr, 2012 21:00	Social Event	03 Apr, 2012 09:54	Delete
Edit Event in May	29 May, 2012 00:00	29 May, 2012 23:00	Annual Dinner	02 May, 2012 14:54	Delete

This screen comprises of the following items:

Create an Event button – Use this to create a new event for the Near You website

[Learn more](#)

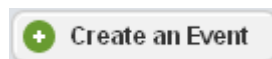
Display list – Use this to filter the Events for the Areas you have editing rights for.

List of Events for a particular Area – Displays the Event Name, Start Date/Time of the Event, End Date/Time of the Event, Event Type and the date and time their information was last updated. Each record can be edited or deleted

TIP: You can sort the columns by clicking on their heading

Create an Event

Click the 'Create an Event' button.



You will be presented with the following screen:

The screenshot shows the 'Event Details' form in the Sitefinity CMS. The form is titled 'Event Details' and is located at the URL 'nearyou.imeche.org/Sitefinity/Content/NearYouEvents/Create'. The form includes the following fields:

- Event Name:** A text input field.
- Start Date & Time:** A date and time picker with a calendar icon.
- End Date & Time:** A date and time picker with a calendar icon.
- Status:** A dropdown menu currently set to 'Draft'. A tip below it states: 'Tip: A "Draft" event is never shown to the public.'
- Information on Speaker(s):** A text area with a maximum character limit of 300.
- Description:** A rich text editor with a toolbar containing bold, italic, link, unlink, list, and image icons. The toolbar also includes a 'Normal' dropdown and a 'More formatting options' button.

Complete the relevant fields, making sure you select which Areas that you wish the Event to appear under

Click the 'Save Event' button

Please note: Events that have the status of "Draft" will not be displayed on the Near You website. You will have to select a status of "Active" for it to be viewed.

Documents & Files

Click the 'Content' link at the top of the page.

Select 'Documents & Files' from the 'Types of Content' dropdown list. You will be presented with the following page, which will contain a list of ALL Documents and Files held on Sitefinity, together with actions you can perform on them.

Use this page to upload, edit, and manage documents or files.

TITLE / STATUS	ACTIONS	FILE / DIM. / SIZE	LIBRARY / CATEGORIES / TAGS	OWNER	LAST MODIFIED
WAC Prize 2012 Abstract - Bianchi - Auxetic Foams - Bristol Uni - Rolls-Royce Published	Embed link to this file Actions	PDF 64 KB	Library: Western Aerospace Centre Categories: Tags:	Pauli Markkanen	24 May, 2012 04:22:36
WAC Prize 2012 Report Published	Embed link to this file Actions	PDF 196 KB	Library: Western Aerospace Centre Categories: Tags:	Pauli Markkanen	24 May, 2012 04:21:10
Chairman's Report to NWR AGM for 2011 2012 Published	Embed link to this file Actions	DOC 380 KB	Library: North West Region Categories: Tags:	Ian Fielding	23 May, 2012 11:25:49
GiE Day Poster A3 HQ Published	Embed link to this file Actions	PDF 2507 KB	Library: West Cumbria Young Member Panel Categories: Tags:	Matt Cleaver	21 May, 2012 06:50:32
GiE Day Poster A4 LQ Published	Embed link to this file Actions	PDF 178 KB	Library: West Cumbria Young Member Panel Categories: Tags:	Matt Cleaver	21 May, 2012 06:48:38
Composites Centre map Published	Embed link to this file Actions	PDF 250 KB	Library: Merseyside & North Wales Categories: Tags:	Nikki Barker	21 May, 2012 04:58:01
Composites Lecture Poster 19 June Published	Embed link to this file Actions	PDF 470 KB	Library: Merseyside & North Wales Categories: Tags:	Nikki Barker	21 May, 2012 04:58:56
QLD Panel AGM Meeting Minutes 01 02 2012 Published	Embed link to this file Actions	PDF 25 KB	Library: QLD Panel Categories: Tags:	Simon Clarkin	21 May, 2012 09:10:39
QLD Panel Committee Meeting Minutes 01 02 2012 Published	Embed link to this file Actions	PDF 27 KB	Library: QLD Panel Categories: Tags:	Simon Clarkin	21 May, 2012 09:06:52
uclan-2d-map-2007 Published	Embed link to this file Actions	PDF 452 KB	Library: North Western YM Panel Categories: Tags:	Vicki Ball	21 May, 2012 08:19:44

Section contents

On this page you can do the following:

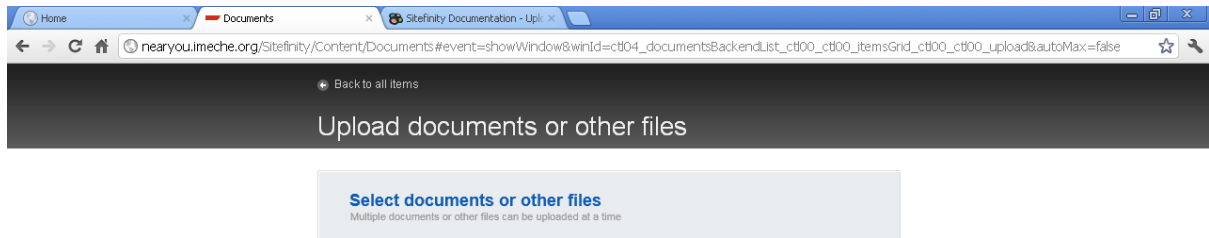
- [Upload documents and files](#)
- Edit properties of documents and files
- Sort, filter, and search for documents and files
- Manage document and file libraries

Upload documents and files

1. Click the **"Upload documents or other files"** button -

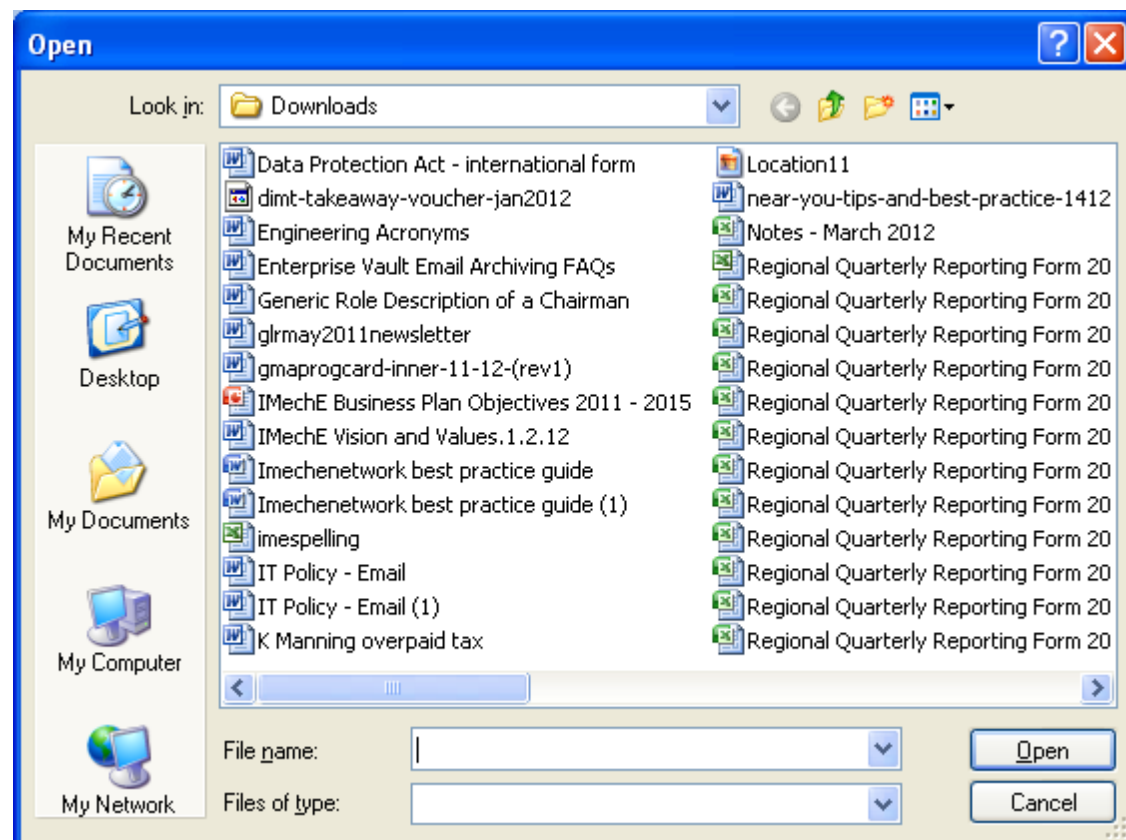


The **"Upload documents or other files"** page appears.



Click the **Select documents or other files** link.

The following pop up will appear:



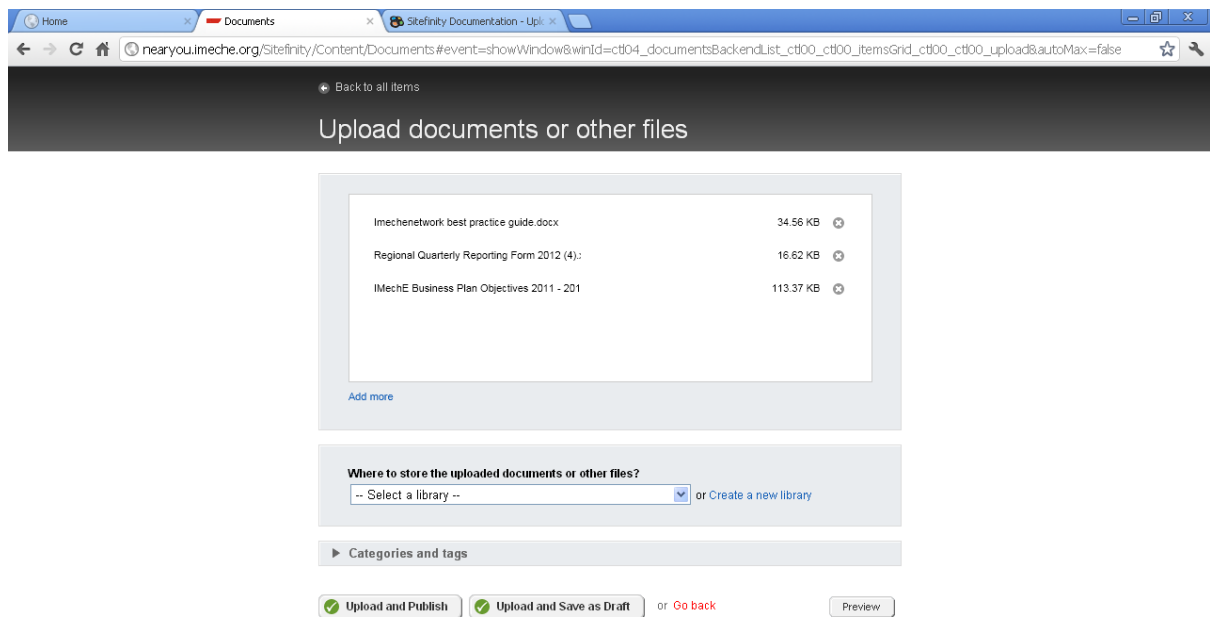
Navigate to where the documents are stored on your computer

Click the document you wish to upload

TIP: - You can select multiple documents by holding down the <Ctrl> key and clicking the documents you wish to upload.

Click the "Open" button

The pop up will close and the documents you selected will be transferred to the Upload Images page (example below):



TIP: You can remove any documents you may have erroneously uploaded by clicking the 'X' icon next to that document.

TIP: You can add more documents to the ones you may have already uploaded by clicking the "Add more" link and repeating the above procedure .

Select whether you would like to upload your documents to an existing Document Library or to a new Document Library

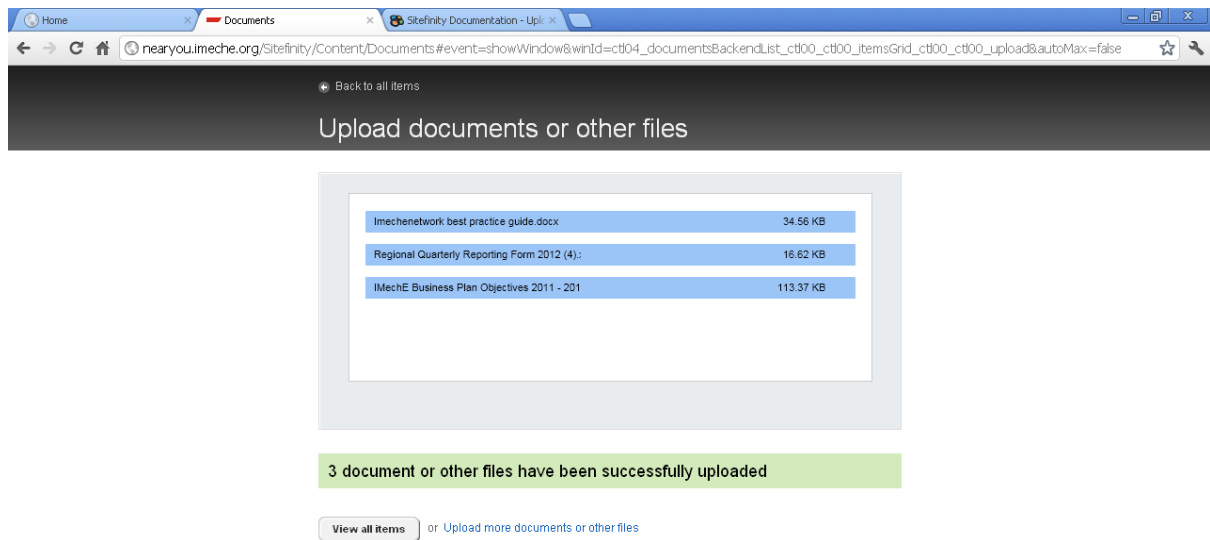
To store documents in an existing Document Library

Select an appropriate Document Library from the **"Where to store the uploaded documents or other files?"** dropdown list

TIP: Search for items in a dropdown list more efficiently by typing the first letter(s) of the item you are searching for.

Click the "Upload and Publish" button

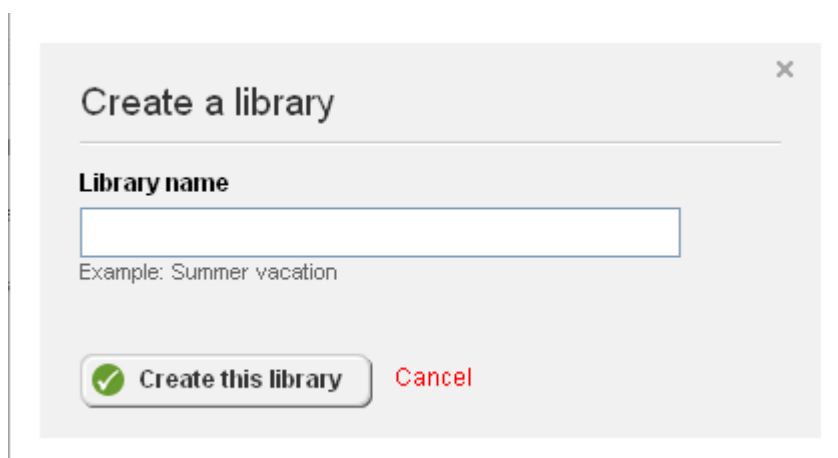
A message telling you that your documents have been successfully uploaded should appear (below)



To store documents in a new Document Library

Click the "Create a new library" link

The following pop up will be displayed:



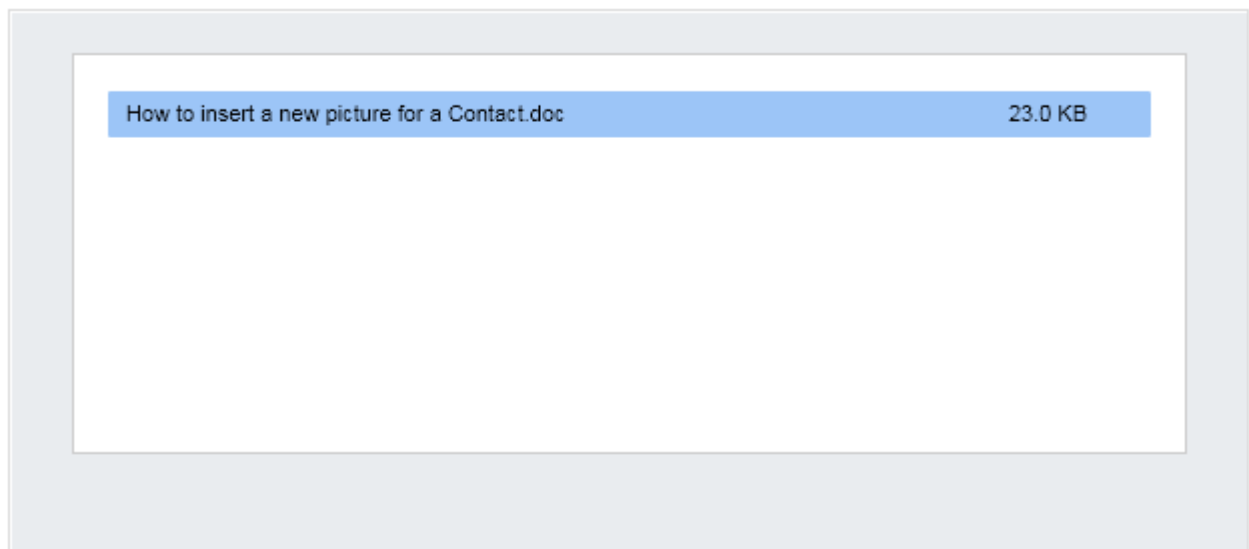
Type the name of your library into the “Library name” field and click the “Create this library” button

TIP: - For ease of navigation, the user must adhere to the following naming convention; If they are a member of the Eastern Young Members Panel, then all new libraries should have the naming convention of: Eastern Young Members Panel (followed by a space dash space) – (followed by the name of the library). For example: - Eastern Young Members Panel - newsletters. **Please note:** - Sitefinity does not allow you to nest folders , hence the importance of proper naming conventions.

Select your newly created Document Library from the **“Where to store the uploaded documents or other files?”** dropdown list

Click the “Upload and Publish” button

A message telling you that your documents have been successfully uploaded should appear (below)



1 document or other file has been successfully uploaded

[View all items](#)

or [Upload more documents or other files](#)

Click the “View all items” button to return to the Documents & Files page or choose to [upload more documents or other files](#)

TIP: You can also use the Tags or Categories Widget to filter images.

Forms

Use this option to create web forms such as a Feedback form. To create a web form:

Click “Content” and “Forms”

A list of already created forms will be displayed (below):

The screenshot shows the Sitefinity CMS interface for managing forms. The main content area displays a table of existing forms with columns for Title, Owner, and Last Modified. The table lists several forms, including 'Tyne-Tees AD Event Registration', 'DNA_BookingForm', 'Site Help - Editor FAQs', 'Questionnaire', 'Site Help - Report a Problem', 'Test Form', 'Design', and 'West Cumbria Area attendance'. Each form entry includes a 'View' link, a response count, and an 'Actions' dropdown menu. The right sidebar contains a 'Manage Forms' section with filters for 'All forms', 'My Forms', 'Published', and 'Drafts', as well as a 'Forms Settings' section for 'Permissions for forms'. A 'Learn more with video tutorials' section is also present, featuring a video titled 'How to setup forms' (5:23 min).

TITLE	OWNER	LAST MODIFIED
Tyne-Tees AD Event Registration Locked by Alok Nagachandran Krishnan Published	Alok Nagachandran Krishnan	08 May, 2012 12:43:49
DNA_BookingForm Published	Julia Williams	08 May, 2012 11:51:07
Site Help - Editor FAQs Published	Stuart Radlett	08 May, 2012 11:16:49
Questionnaire Draft	Kevin Manning	08 May, 2012 11:13:22
Site Help - Report a Problem Published	Stuart Radlett	30 Mar, 2012 06:19:59
Test Form Published	Alex Man	20 Mar, 2012 10:15:27
Design Published	Arinze Nnadi	31 Jan, 2012 06:00:21
West Cumbria Area attendance Published	Lloyd Neale	22 Jan, 2012 06:31:46

Click the “Create a form” button

The following page will be displayed:

Create a form

Title

Example: *Register*

Name used in code (for developers)
[Change](#)

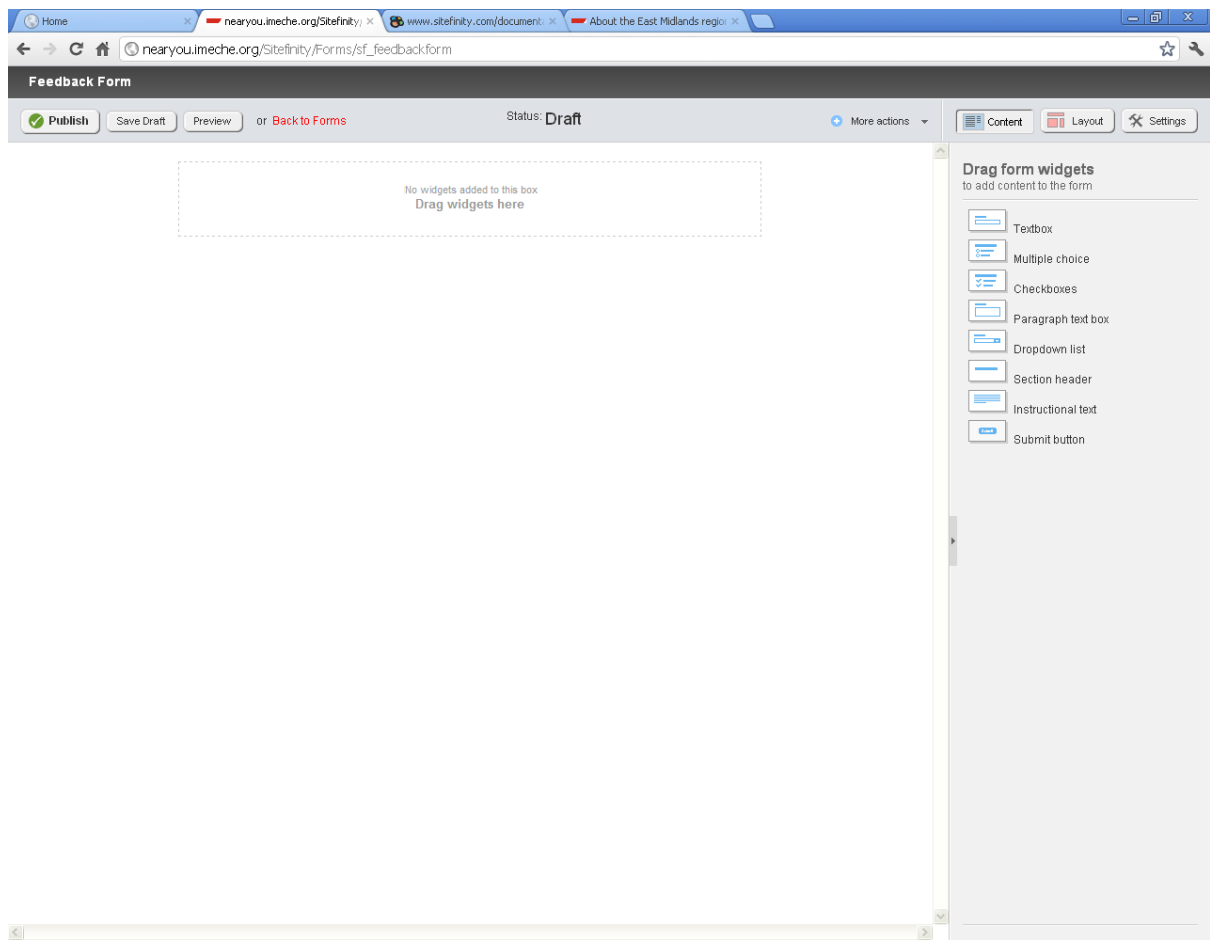


Create and go to add content

Create and return to Forms

[Back to Forms](#)

Enter the title of your form into the “Create a form” text field, for example Feedback Form and click the “Create and go to add content” button. Alternatively, click the “Create and return to Forms” button to save as a draft version.



Adding form widgets to your form

Use the following widgets to create your form

Textbox – A single line textbox used for entering information such as a person's name, email address etc.

Multiple choice – A list of radio buttons representing one of a set of options, only one of which can be selected at any time.

Checkboxes - A list of checkboxes that permits a user to make multiple selections from a number of options.

Paragraph text box - A multi line textbox used for entering several lines of information, such as comments.

Dropdown list - Allows a user to choose one value from a list. When a drop-down list is inactive, it displays a single value.

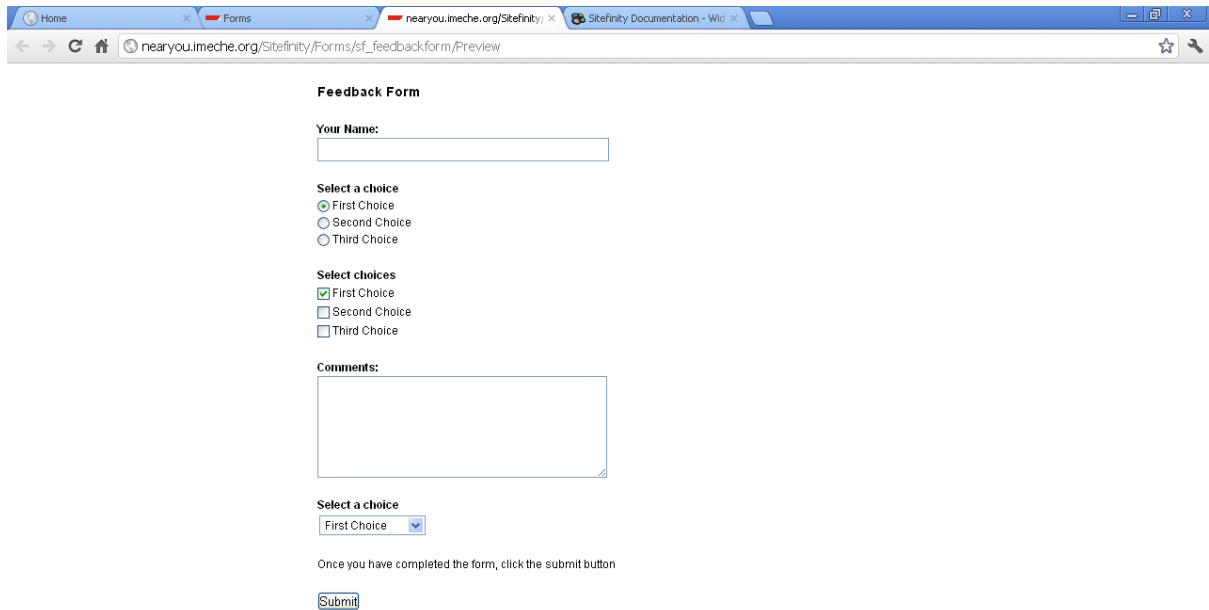
Section header – Used to label a particular section of a form. For example, personal details.

Instructional text – Used to instruct a user how to use the form or part of the form

Submit button – Used to submit the form. The amount of responses denotes how many times your form has been completed by a user. These can be found next to the form on the Forms page.

TIP: Use the Edit option to determine the look and feel of the form widgets. For example, to make them mandatory input, amend the size of a text field or to add additional choices to a multiple choice widget such as a Dropdown list.

Example of a completed Form



The screenshot shows a web browser window with four tabs: 'Home', 'Forms', 'nearyou.imeche.org/Sitefinity', and 'Sitefinity Documentation - Wild'. The address bar displays 'nearyou.imeche.org/Sitefinity/Forms/sf_feedbackform/Preview'. The form itself is titled 'Feedback Form' and contains the following fields and options:

- Your Name:** A text input field.
- Select a choice:** Three radio button options: 'First Choice' (selected), 'Second Choice', and 'Third Choice'.
- Select choices:** Three checkbox options: 'First Choice' (checked), 'Second Choice', and 'Third Choice'.
- Comments:** A large text area.
- Select a choice:** A dropdown menu with 'First Choice' selected.

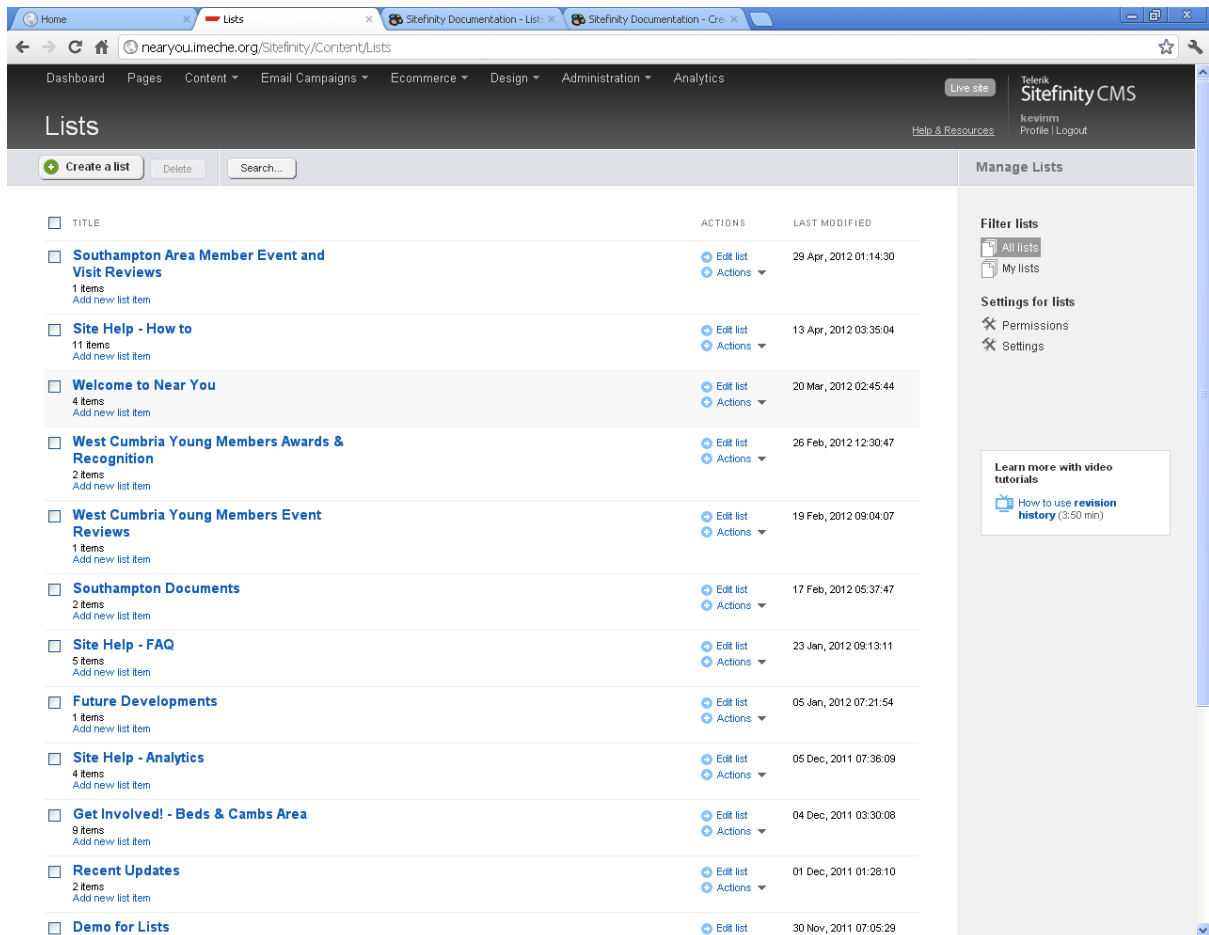
Below the form fields, there is a text instruction: 'Once you have completed the form, click the submit button'. At the bottom of the form is a 'Submit' button.

Lists

Use this option to create collapsible lists such as FAQ's

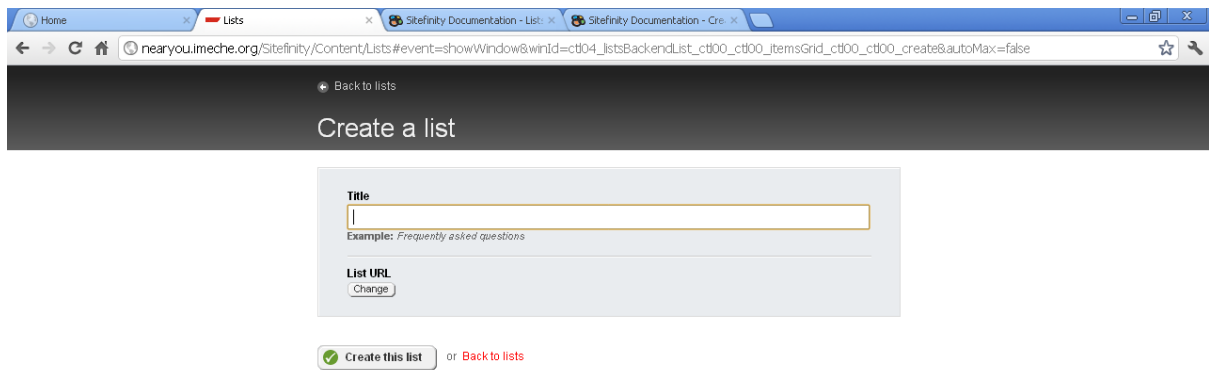
Click "Content" and select "Lists"

The following page will appear:



Click the "Create a list" button

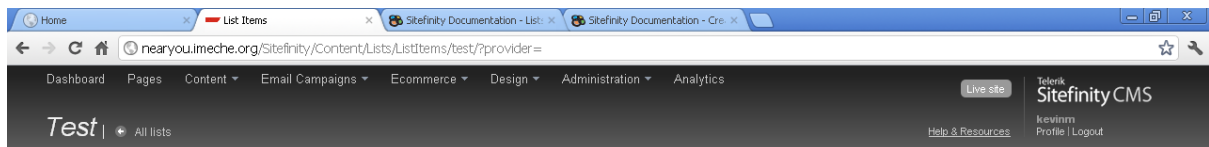
The following screen will appear:



Enter a title for your list into the “Title” text field.

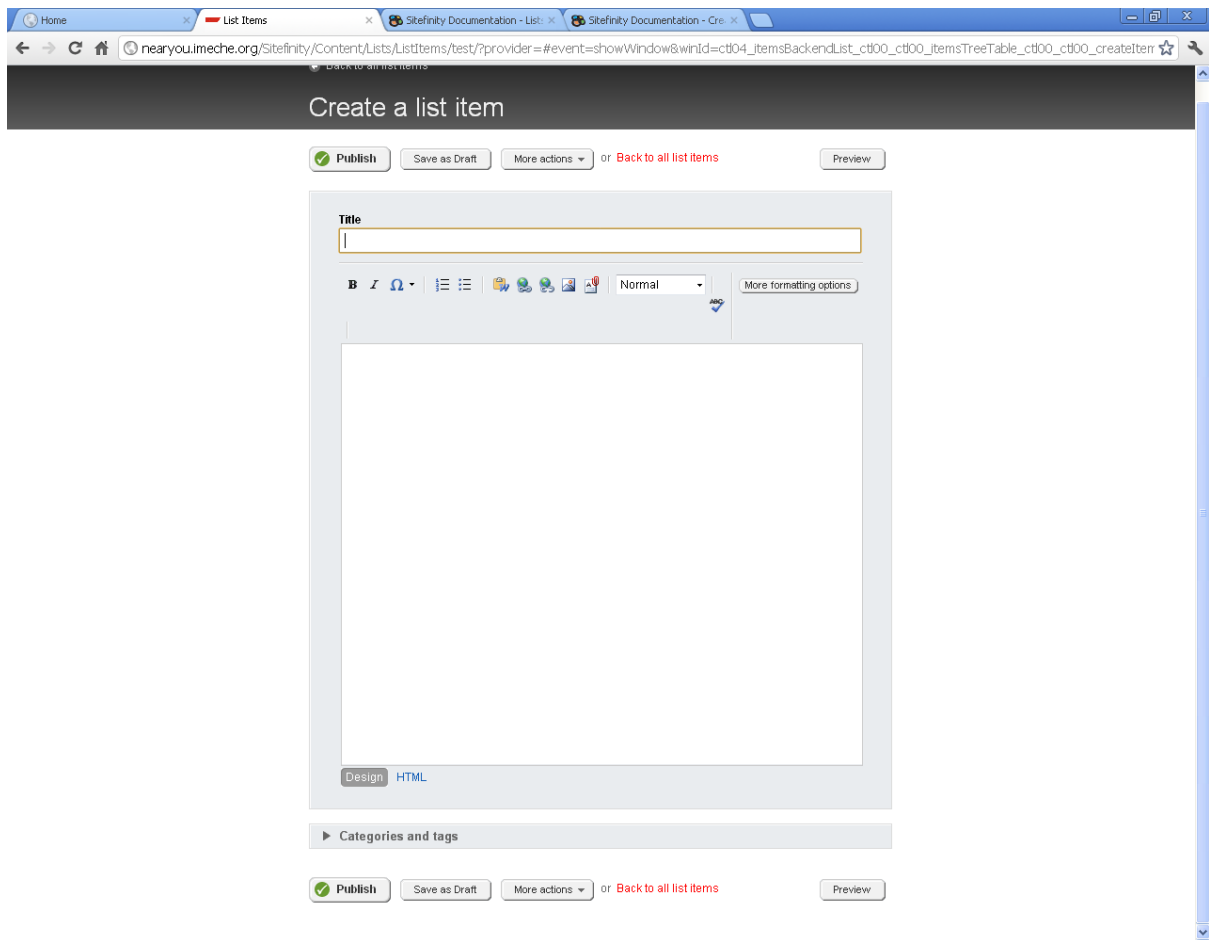
Click the “Create a list” button

The following page will appear:



Click the “Create a list item” link

The following page will appear:



Enter a title in the "Title" text field (this will appear as a sub-heading).

Enter text in the text body and click the "Publish" button.

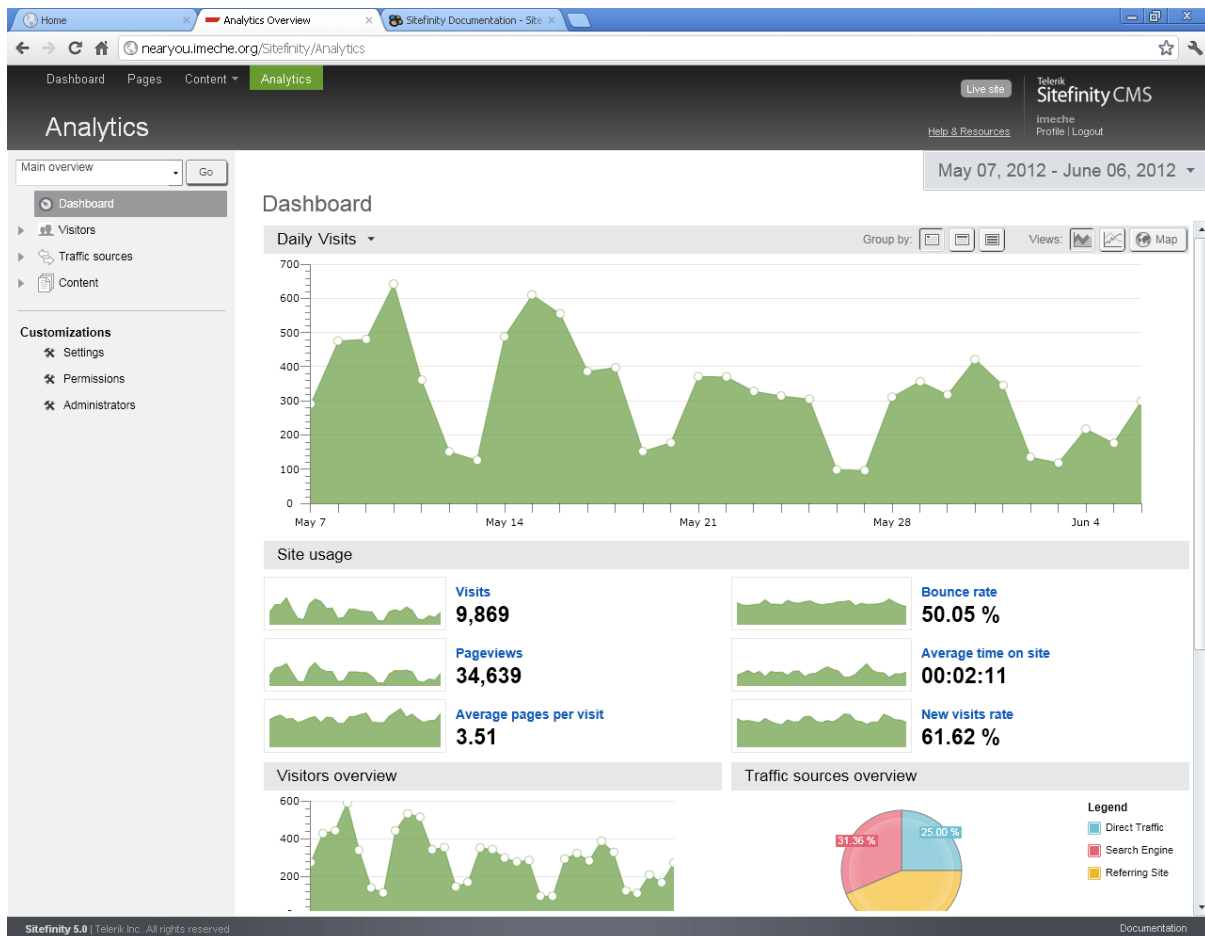
Click the "Create a list" button to create additional sub-headings.

To use your list on a web page, drag a list widget onto the page and
"Select which list to display"

Analytics

Use Sitefinity Analytics to track your website traffic and marketing effectiveness. The module consists from various reports and indicators that give you statistics for the visits and the visitors of your website, the way they reach it and use it, and more.

To open Analytics, in the main menu in the upper part of the screen, click Analytics. The following page will be displayed:



PLEASE NOTE: The statistics displayed here are for the entire Near You website. To filter the data to something more specific to your Area, type the URL of your web pages after the URL displayed in the address bar (http://nearyou.imeche.org/Sitefinity/Analytics#/Content/Top_content)

For example:

http://nearyou.imeche.org/Sitefinity/Analytics#/Content/Top_content//near-you/UK/North-Western/West-Cumbria-Area

http://nearyou.imeche.org/Sitefinity/Analytics#/Content/Top_content//near-you/UK/North-Western/West-Cumbria-Area/events

http://nearyou.imeche.org/Sitefinity/Analytics#/Content/Top_content//near-you/UK/North-Western/West-Cumbria-Area/past-events

Filtering, displaying, and grouping data

Use this section to learn how to set different time intervals, how to group data, what types of charts are available to you, and how to navigate between different reports.

Using the Analytics map

The Analytics map is a geographic map of the world that depicts your website visits and other indicators, such as use of mobile devices to access your website. The data is displayed per countries, per regions, and per cities.

Understanding the Dashboard

The Dashboard is the entry point to the Analytics module. You use it to view the most important indicators for your website traffic, together with overviews of the main reports.

Information about website visitors

Use this section to view various statistics for the visitors of your website, such as number of visitors, time they spent on your website, pages they visited, and more.

Technical information about the visitors

Use this section to view various statistics about the browsers and networks your visitors use, their screen resolutions, operating systems, and more.

Information about website traffic sources

Use this section to view various statistics about the sources of traffic to your website, such as direct traffic, referring traffic, or search engine traffic, and details about what generates the different types of traffic.

Information about the visited content

Use this section to view various statistics about what content do visitors of your website view, like the most visited pages, the most frequent starting pages, and more.

Information about the website internal search

Use this section to view various statistics about your internal site search (the search box on your website), how often the search functionality is used, which are the most commonly used search terms, and more.

Index of reports

Use this section as a reference. It contains a complete list of all reports in Sitefinity Analytics and links to information about each report.

Exporting data

You can exports all the data gathered for your website to backup it and further analyze it. The Analytics module exports data in an Excel XML file. You can export data from every table that is in the reports. To export data from a table, perform the following:

Click the Export button in the upper-right corner of the table.

Select a name for the file and choose a location where to save it.

Click Save.

The system saves the file with extension .xml.