



Getting started with Content Management



The World Wide Web is a mature communications channel and has become an integral part of people's lives. With increased user engagement, there is a concomitant expectation of ever-changing content.

Contents

Contents.....	3
Introduction	4
Log in to the application	5
Logging in	5
Logging out.....	6
Retrieving a forgotten password.....	6
Pages.....	7
Editing a page	8
Working with components.....	10
Components	10
Adding a component	11
Removing a component	11
Editors	12
Editing Components	13
Adding an image.....	14
Creating a hyperlink to a web site page	14
Creating a hyperlink to a PDF/Word document	15
Adding a new Web page.....	16
Publishing	19
Publishing a Page.....	19
Publishing the entire Web Site.....	23
Extensions.....	24
Adding a new item	25
Editing an item	26
Adding the extension component to a page	27
Administration	30
Adding a new role	30
Adding a user.....	32

Introduction

Etelligent is a fully-integrated communications management tool-suite comprising email marketing and web site content management.

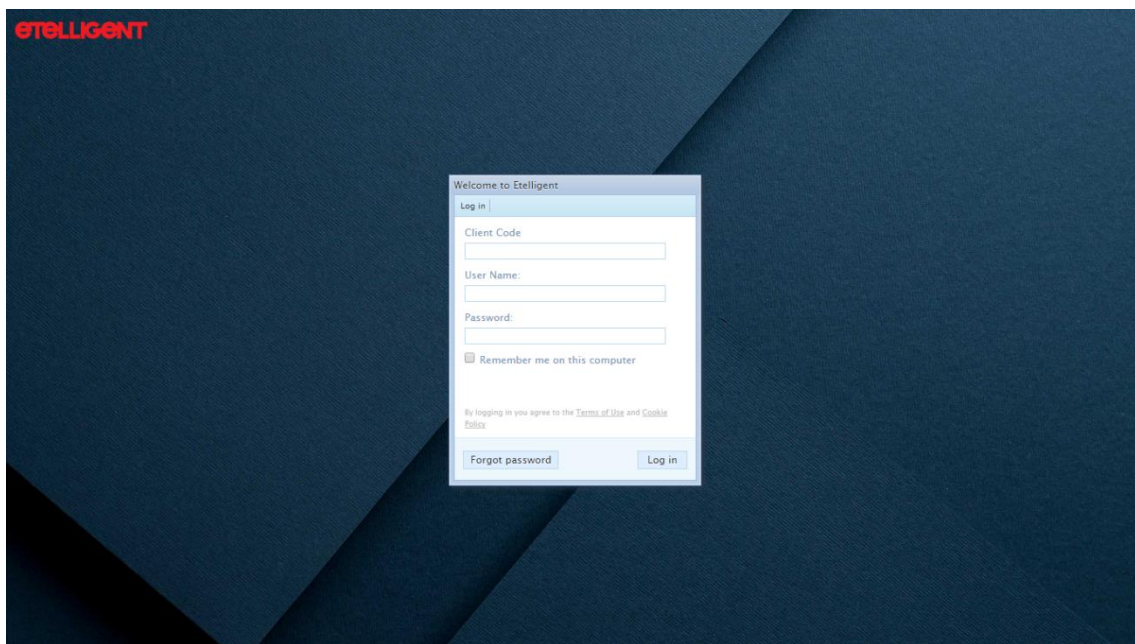
This guide provides step-by-step instructions on how to keep a web site up to date. It will cover such activities as: adding a new page; uploading images; linking to PDF files; working with Etelligent Extensions; managing workflow; and user administration.

Log in to the application

Users are required, for security reasons, to log in and out of the application. A remember feature exists to enable users to avoid logging in and out on every occasion. Forgotten passwords can also be reset by selecting the option on the login screen.

Logging in

1. Launch a modern web browser and enter the login URL provided by your support team in the Address Bar.



2. Complete the login details:

Client code

The account you wish to log in to

User name

The username provided to you

Password

The password provided to you

3. Click on the **Log in** button

Logging out

1. Click on the Log out button located at the top right hand corner of the Navigation

Retrieving a forgotten password

1. Navigate to the login screen. Please contact support if you are unaware of the login URL.
2. Click on Forgot your password?
3. Complete the form and click **Send password reminder**
4. An email will be sent to the email address you specified

Click on the link to take you to a form to reset your password

Pages

Web sites are comprised of many Web pages. In Etelligent each Web page is created from a specific template. Each template defines the regions of the page into which components can be added.

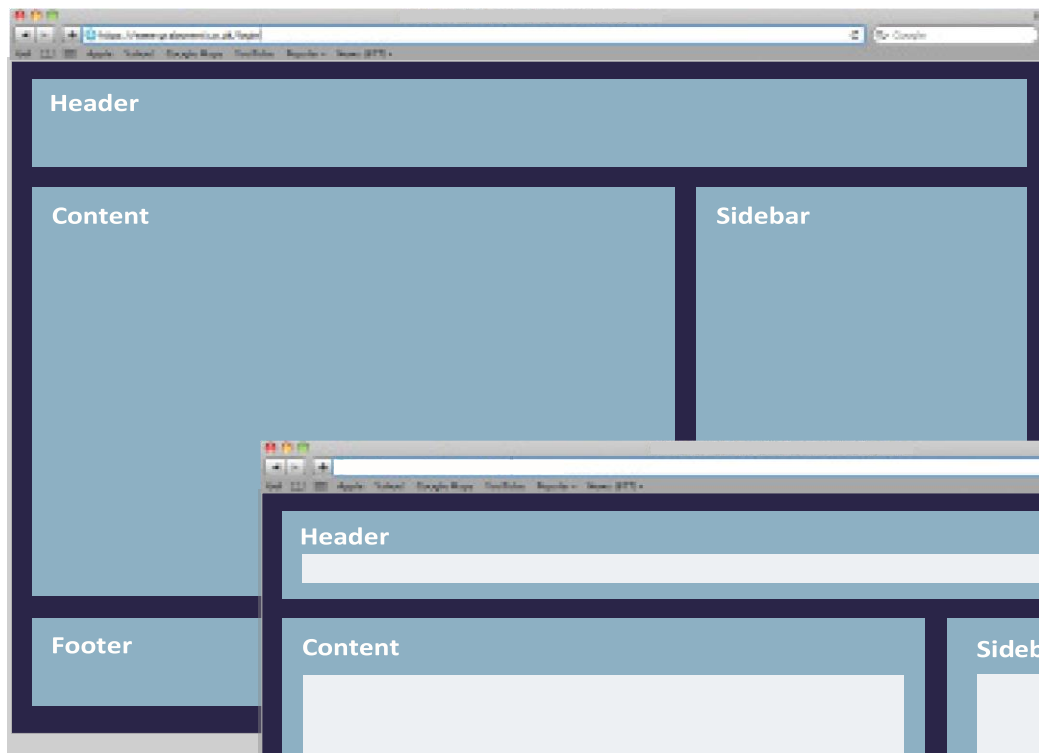
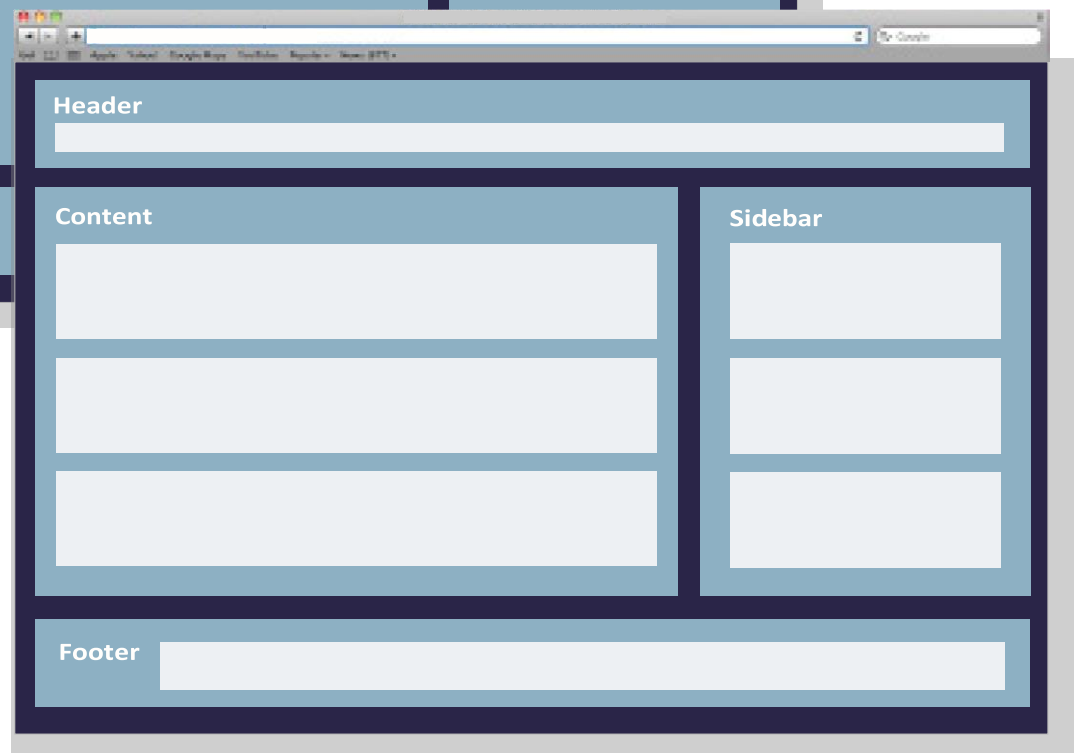


Fig i Template with Regions

Fig ii
Template with components

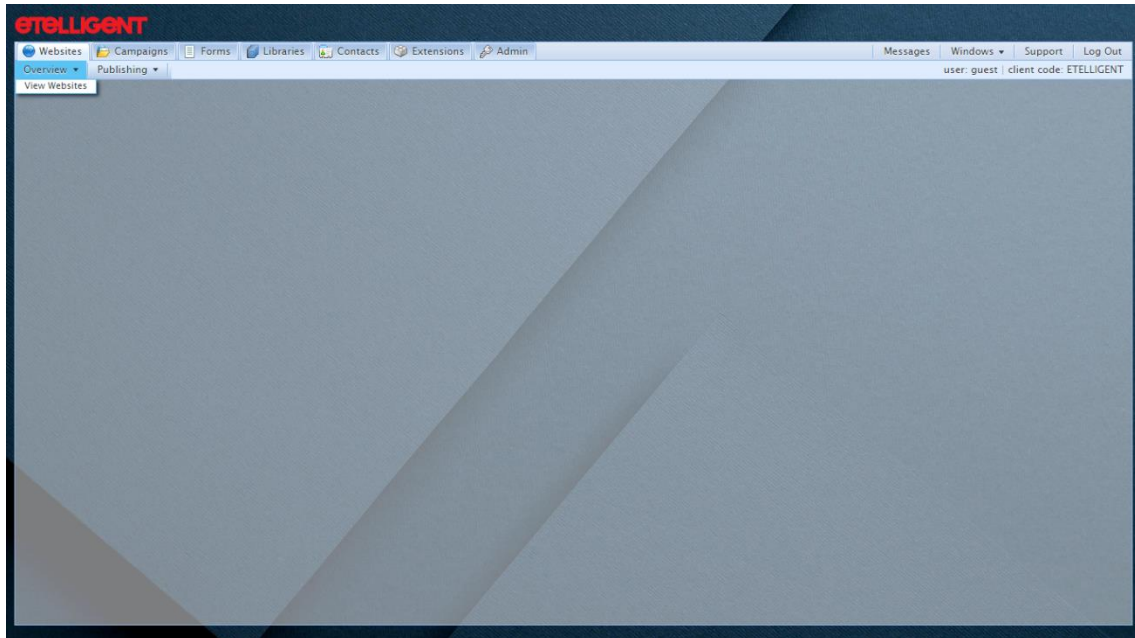


Components

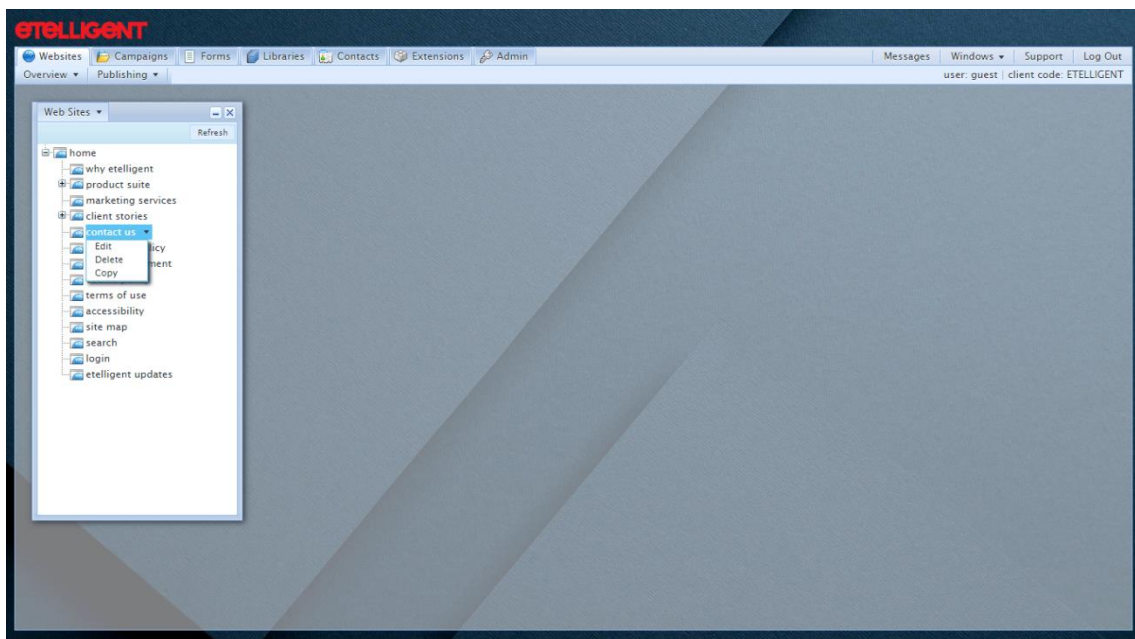
Components in Etelligent are the units of content. They can be comprised of text and/ or images; referenced from a component library; or be an Extension Widget. Extensions and Widgets will be covered in more detail later but it is worthwhile highlighting that some components can be shared across many pages – this allows the component to be edited once and consequently all occurrences in the site to be updated (this is most commonly used for logos and footers or sidebar components).

Editing a page

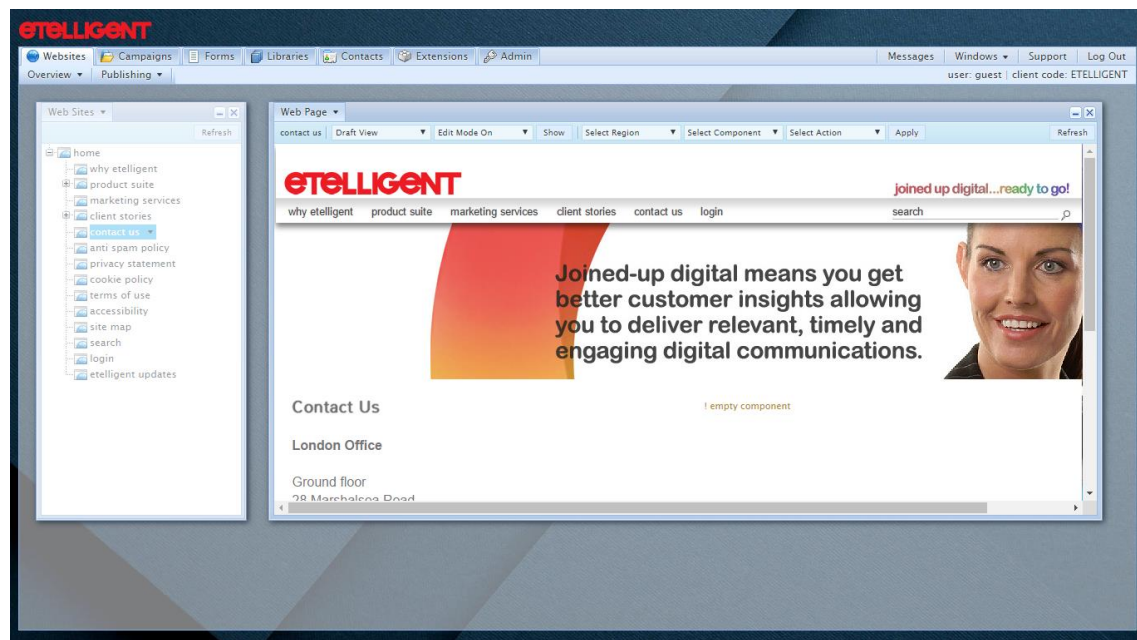
1. Click on the **Websites** tab
2. Click on **Overview**



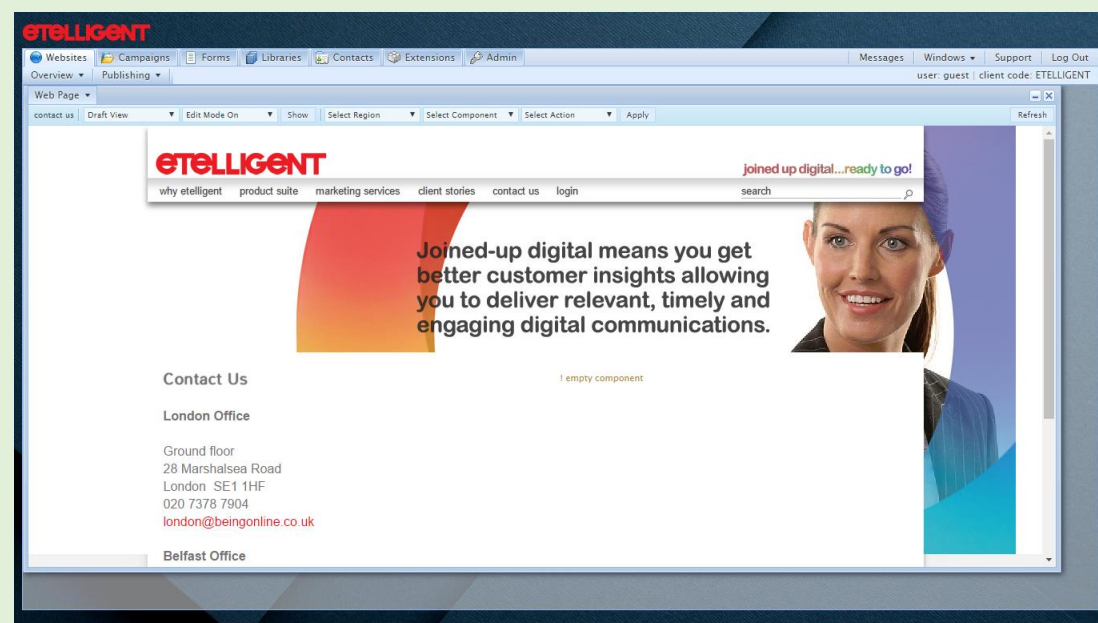
3. Click on **View Websites**
4. Use the plus icons if necessary to navigate to a page that you wish to edit
5. Click on the name of the page



6. Click on **Edit**



Tip. To see more of the Web Page window simply double-click on the title bar beside the Window Title Button ('Web Page'). The window will automatically resize to best fit your screen resolution.

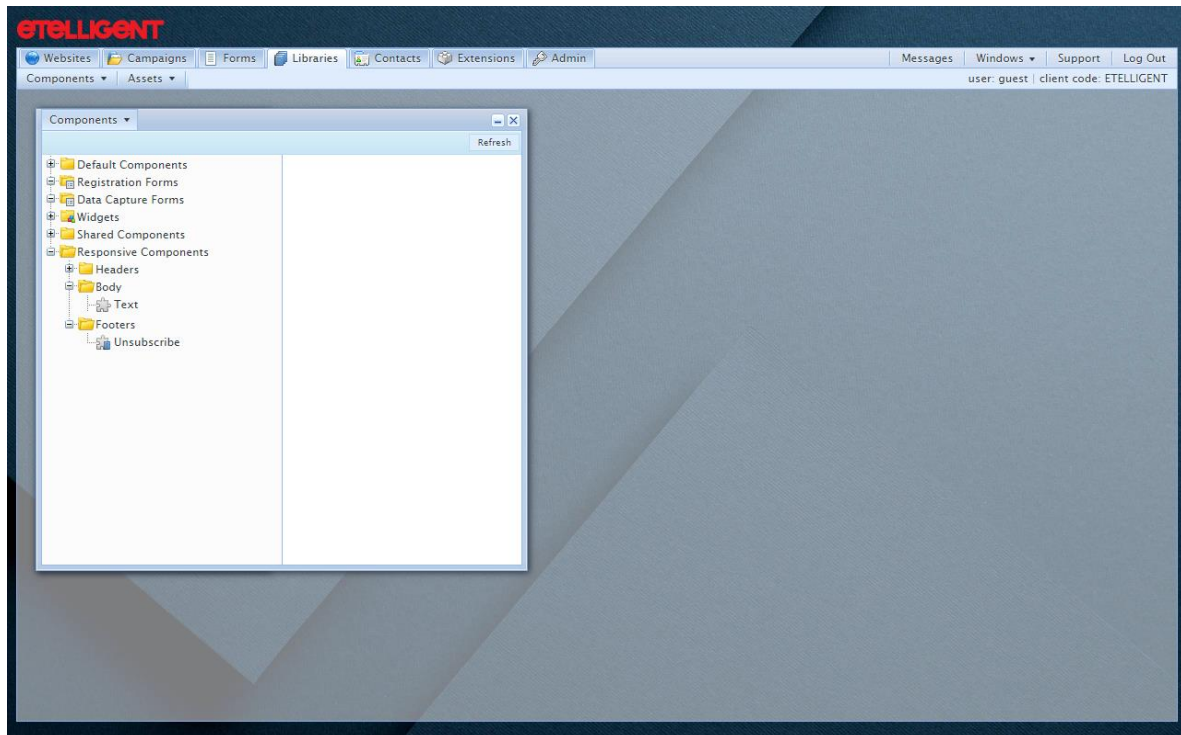


Working with components

Components

Each web page is made up of one or more regions. Each region contains one or more components. You can only move components within their allocated region.

The Component Library is a folder structure where pre-built components by your support team are housed. These components are the building blocks of emails.



There are two main types of components:

Normal Component

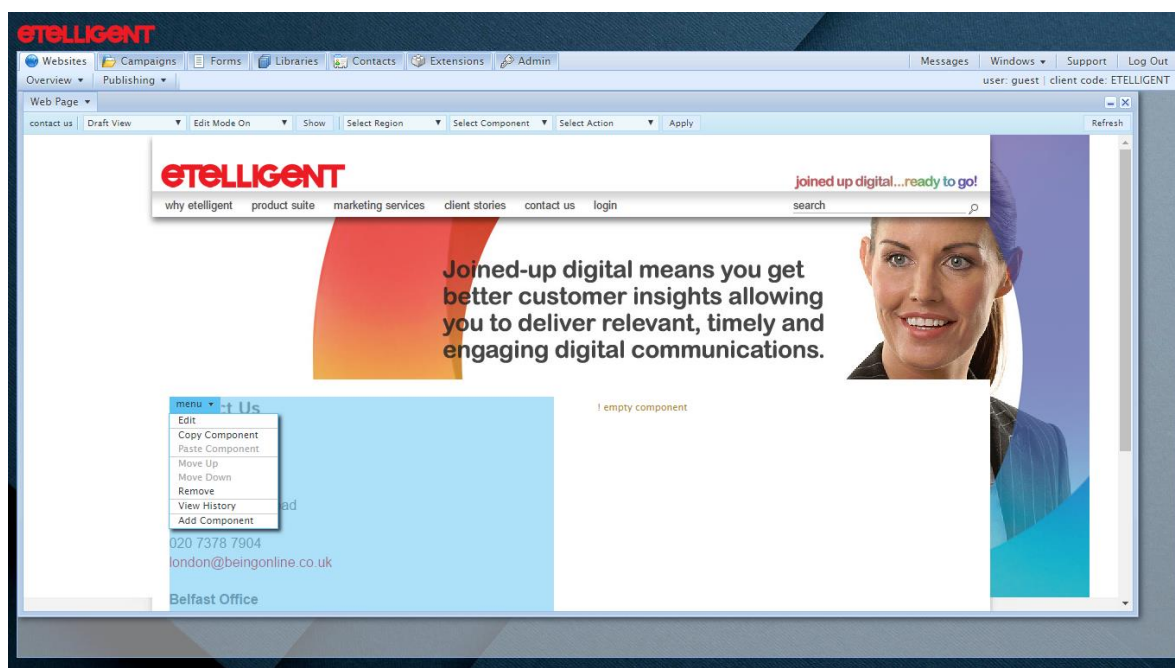
These components can be added from the Component Library and when edited within a web page will not affect the original component in the Component Library. A Normal Component is indicated by a jigsaw piece icon – see the Text component in the Body folder in the Component Library visual.

Shared Component

These components, when edited, affect all 'instances' of the component as it appears in all web pages and in the Component Library. An example of this type of component would be a header or footer where, should an address in the footer require updating, changes to the component will update all 'instances' of it across all templates within the application. A Shared Component is indicated by a jigsaw piece icon with a blue link corner – see the Unsubscribe component in the Footers folder in the Component Library visual.

Moving the mouse over a component will select it. The component is highlighted by an overlay which contains a menu button.

Clicking on the menu button will display the actions that can be performed on that component



Adding a component

1. Select the component you wish to add the new component before
2. Click the **menu** button
3. Click Add component
4. Use the plus icons if necessary to navigate to the component to be added
5. Click on the name of the component to be inserted
6. Click **Insert**
7. The web page will reload with the new component added

Removing a component

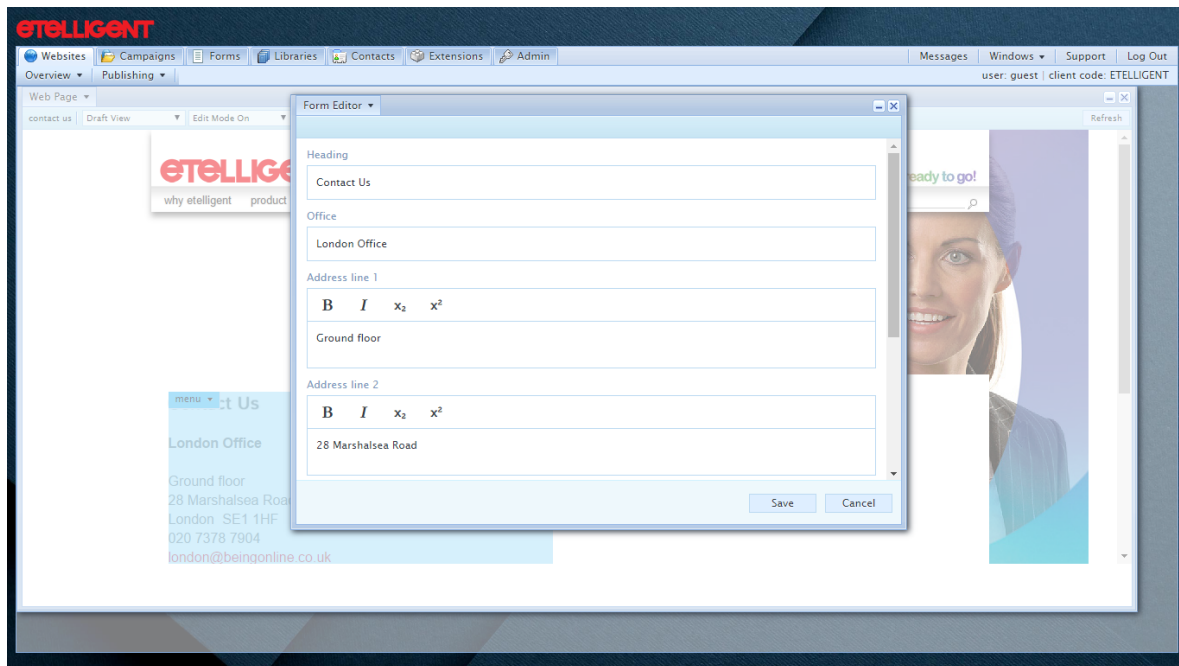
1. Select the component you wish to remove
2. Click the **menu** button
3. Click **Remove**
4. The email will reload with the selected component remove

Editors

Some components are preconfigured to be updated using the **Form Editor**, whilst others use the **Graphical Editor**. The name of the editor in use appears as the window title within Etelligent.

Form Editor

The Form Editor enables quick updating where the focus is predominantly on the content itself.

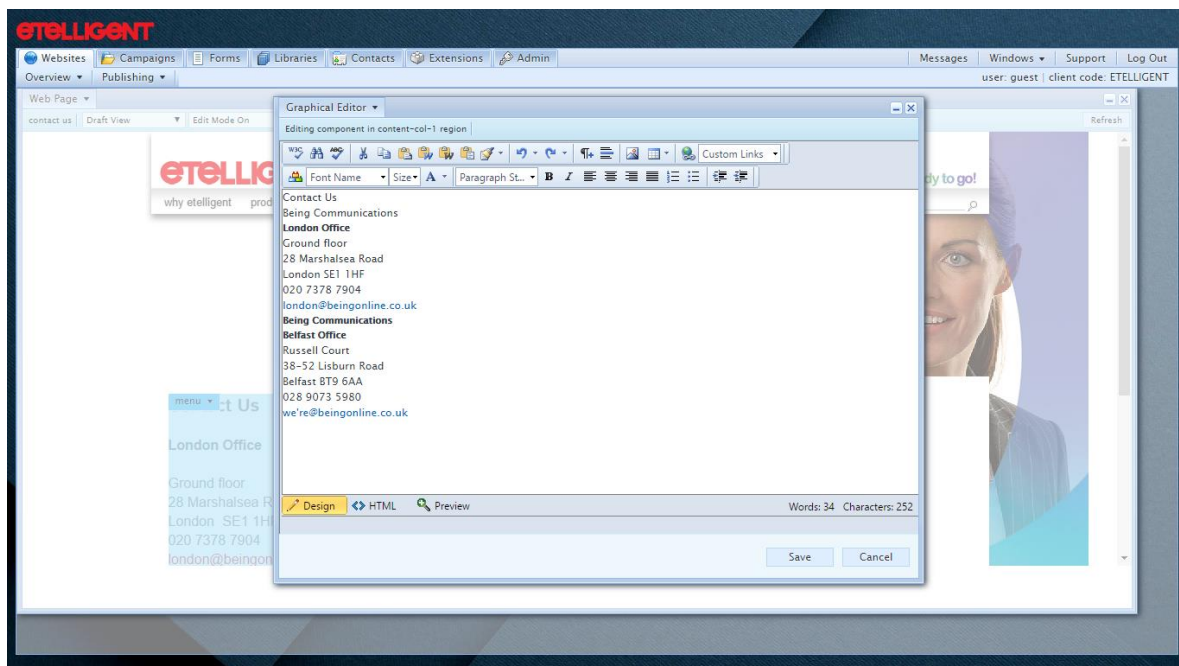


The Form Editor is a faster editing process where only the content is presented in a series of form fields. This means that issues such as maintaining font sizes, colours, etc. are all stored in the component itself.

The Form Editor does itself include a rich-text editor that provides controls to make text bold, insert hyperlinks etc.

Graphical Editor

The graphical editor allows the greatest flexibility but requires more effort as layout, as well as content, has to be managed.



The Graphical Editor gives full editing control but does not support copying and pasting directly from Microsoft Word. It also requires greater effort over maintaining layouts.

Editing Components

Tip.

If using the **Form Editor**, you can copy-and-paste directly from Microsoft Word. Note however that complex styling may be lost.

If using the **Graphical Editor**, in order to quickly get text from Microsoft Word into the Graphical Editor, it is advisable to copy the text from Word and paste it into Notepad (or another plain text editor). Once in Notepad, highlight the text again and copy it and paste into the online editor – this removes any formatting and ensure clean code which should reduce the chances of rendering problems in email clients or web browsers.

1. Select the component you wish to edit by positioning the mouse pointer over it
2. Click the **menu** button
3. Click **Edit**
4. The editor will appear
5. Edit the content
6. Click **Save**

Adding an image

Tip. It is recommended that images are resized before being uploaded into Etelligent. This helps reduce the download time for the recipients. In some instances, there may be a suggested size, where there is not, it is perhaps useful to know that the email templates are typically only 600 pixels in width.

1. Select the component you wish to edit
2. Click the **menu** button
3. Click **Edit**
4. If the **Form Editor** appears, there should be a field with a button called 'Asset Manager' – use this to browse/upload an image.

If the **Graphical Editor** appears, continue on with the following steps:

5. Position the cursor where you wish the image to appear
6. Click on the **Image Manager** button
7. Navigate to the folder you wish to add the image to (click **Upload** to upload an image from your computer¹)
8. Click on the *image name*
9. Click **Insert**

Creating a hyperlink to a web site page

5. Select the component you wish to edit
6. Click the **menu** button
7. Click **Edit**
8. Highlight the text or image that you wish to link to web site page
9. If using the **Form Editor**, click on the **Insert Link** button.

If using the **Graphical Editor**, click on the **Hyperlink Manager** button and complete the form that appears:

URL

The URL of the web site page. Select e.g. http:// or https:// as appropriate. Complete the URL e.g. www.beingonline.co.uk

Target

Specifies whether the linked page will open in a new window or replace the existing page.

Tooltip

The reference for the link. This is sometimes displayed when the mouse pointer comes to rest over the linked text/image (browser dependent). Note: this is especially important in identifying the link in *Reports*

Creating a hyperlink to a PDF/Word document

1. Select the component you wish to edit
2. Click the **menu** button
3. Click **Edit**
4. Highlight the text or image that you wish to link
5. If using the **Form Editor**, click on the **Link to file** button to launch the Document Manager.

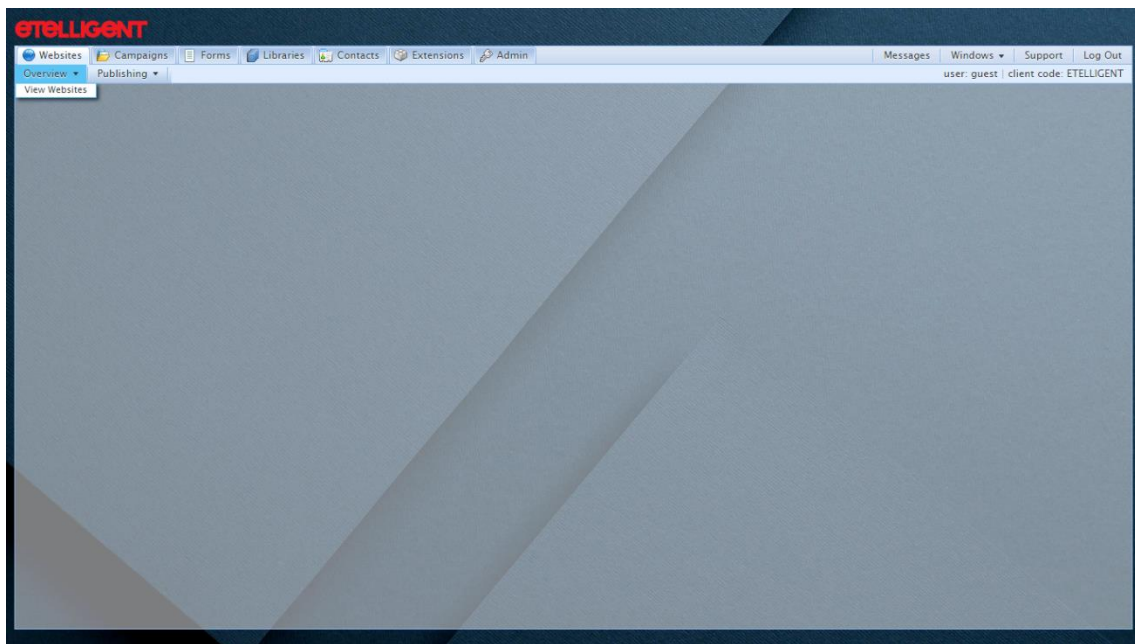
If using the **Graphical Editor**, click on the **Hyperlink Manager button** and click on the paperclip icon to launch the Document Manager

6. Navigate to the folder you wish to add to document to (click **Upload** to upload the document from your computer)
7. Click on the *document name*
8. Click **Insert**

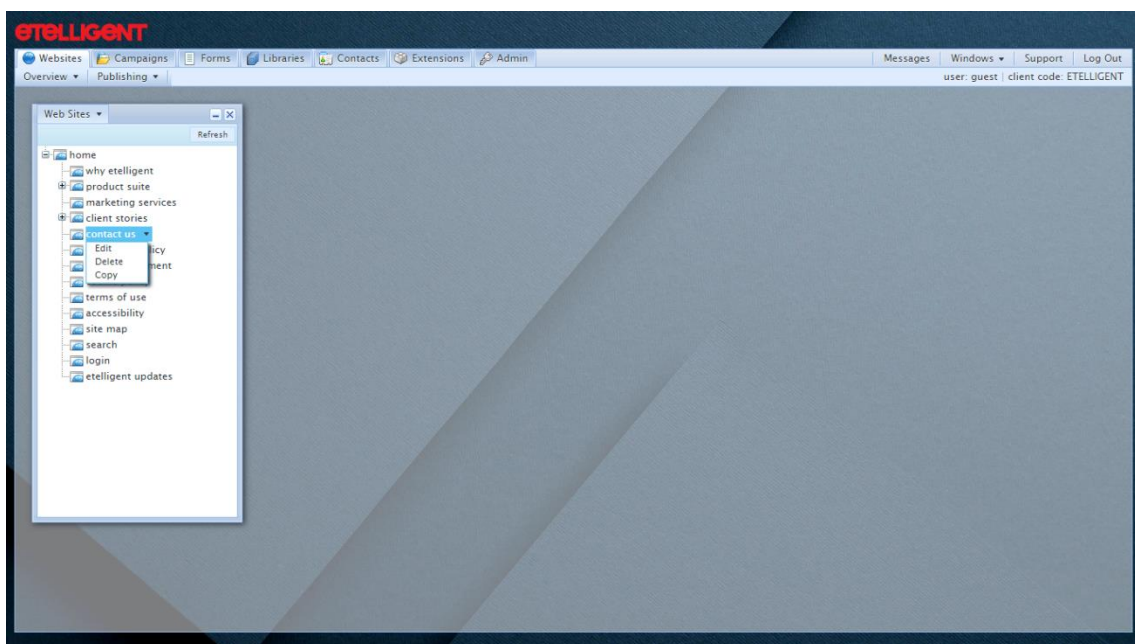
Adding a new Web page

Creating new pages in Etelligent follows the *Copy-and-Create* approach. Simply select an existing Web page that is closest to the desired new page; copy it and then edit the content. This approach removes recreating components over and over again for each new page.

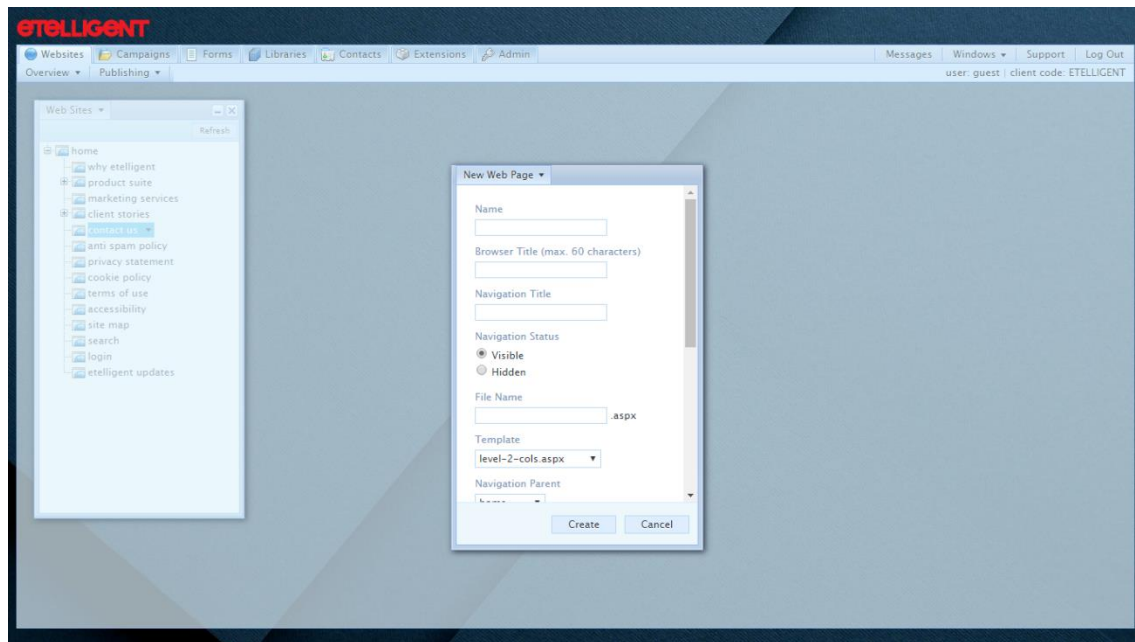
1. Click on the **Websites** tab
2. Click on **Overview**



3. Click on **View Websites**
4. Use the plus icons if necessary to navigate to a page that you wish to copy
5. Click on the name of the page



6. Click on **Copy**



7. Complete the form:

Name

The name used in the application to refer to this page

Browser Title

The title that will be displayed in the browser and will be used as the page title for SEO

Navigation Title

The title that will be used when this page appears in the navigation of the site

Navigation Status

This setting specifies whether or not this page will be visible in the site's navigation. NOTE: setting this value to *Hidden* will still allow this page to be linked to, it just won't automatically be picked up in the navigation hierarchy

File Name

This is the actual system filename of the page. This will form part of the URL e.g. putting **mypage** into this field would mean this page would be accessed from **www.mysite.com/mypage.aspx**. NOTE: This field should only include alphanumeric characters with dashes or underscores and should not include any spaces.

Template

This is the template that this page will follow. The template of the page being copied will automatically be selected

Navigation Parent

This is the page under which the new page will be reside

Timed

This allows the page to exist on the site only during the specified time.

Description

This is one of the page meta tags that help search engines learn information about the page. It can contain up to 200 characters of a paragraph that describes the content of this particular page

Keywords

This is one of the page meta tags that help search engines learn information about the page.

It should contain up to 10 keywords that describes the content of this particular page

8. Click **Create**

When new pages are created, they are in Draft mode and will not be picked up by publishing until the Page Status is adjusted.

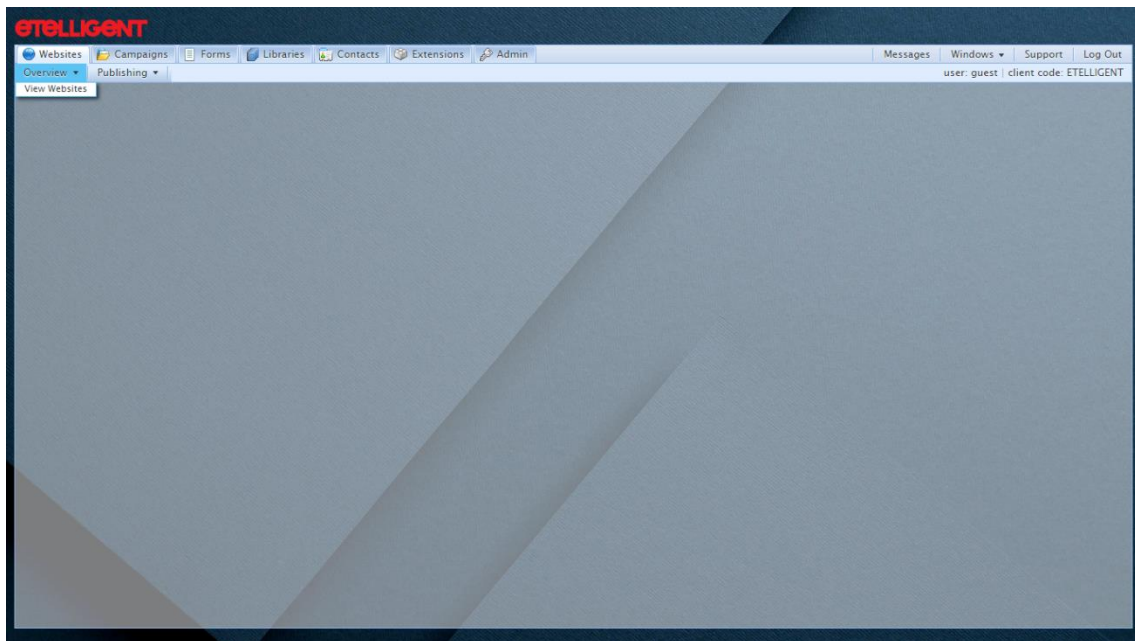
Publishing

Each page in Etelligent has a Page Status. The Page Status can be in one of four states: Draft, Live, Staged or Archived. All newly created pages are defaulted to Draft. Before publishing, pages must have their Page Status set to either Live or Staged.

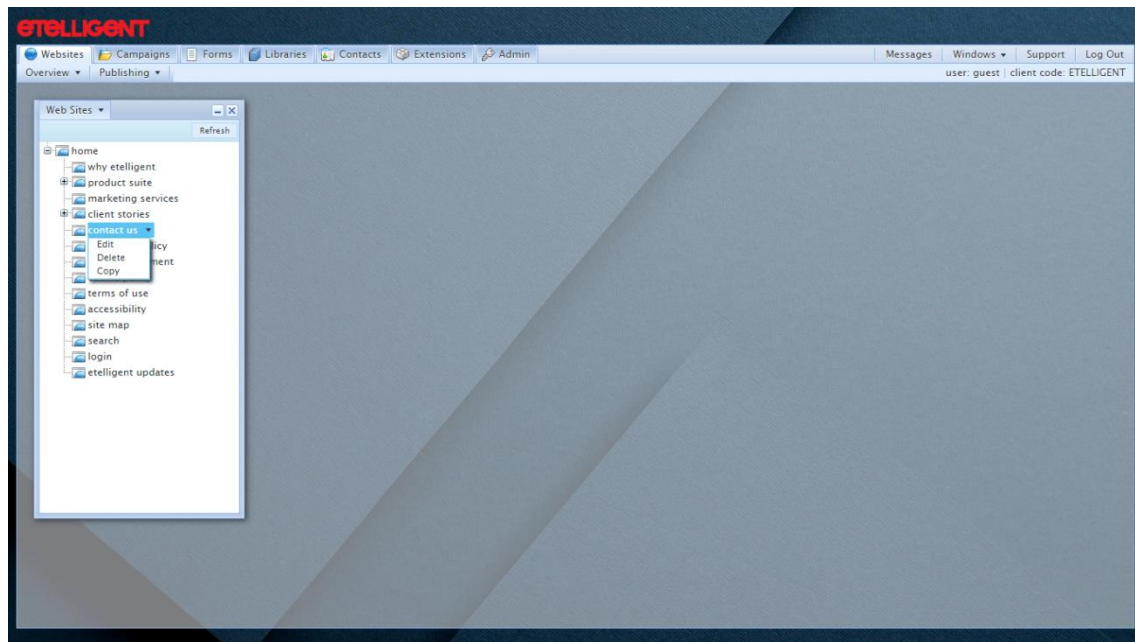
Where a staging environment has been set up the Page Status can be set to Staged to allow for publishing to a previewing site before publishing the page to the live site.

Publishing a Page

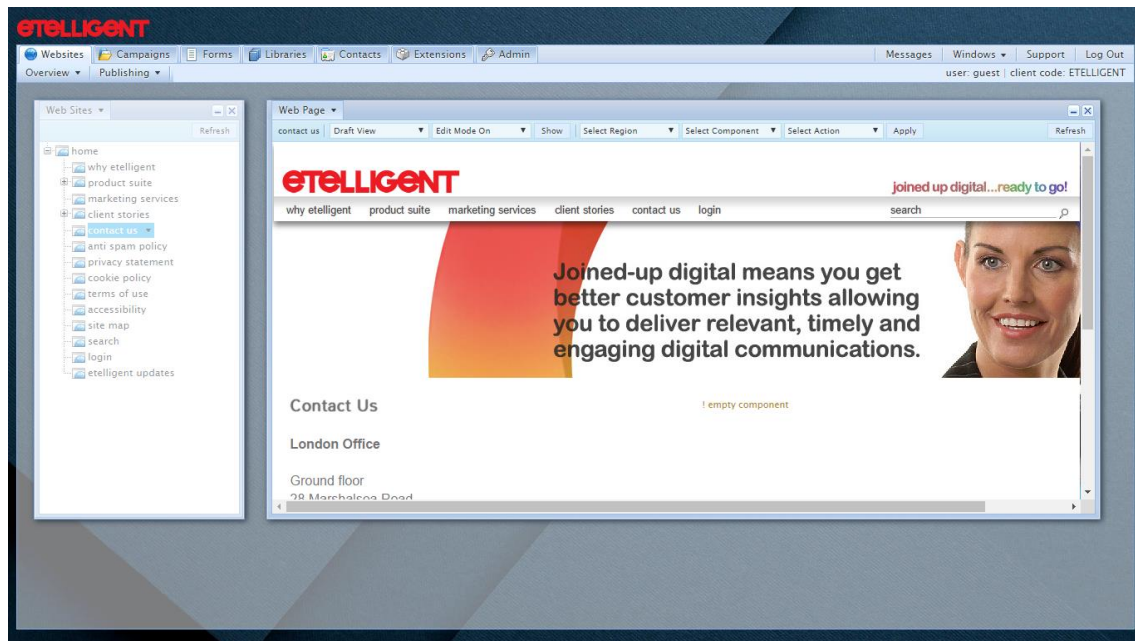
1. Click on the **Websites** tab
2. Click on **Overview**



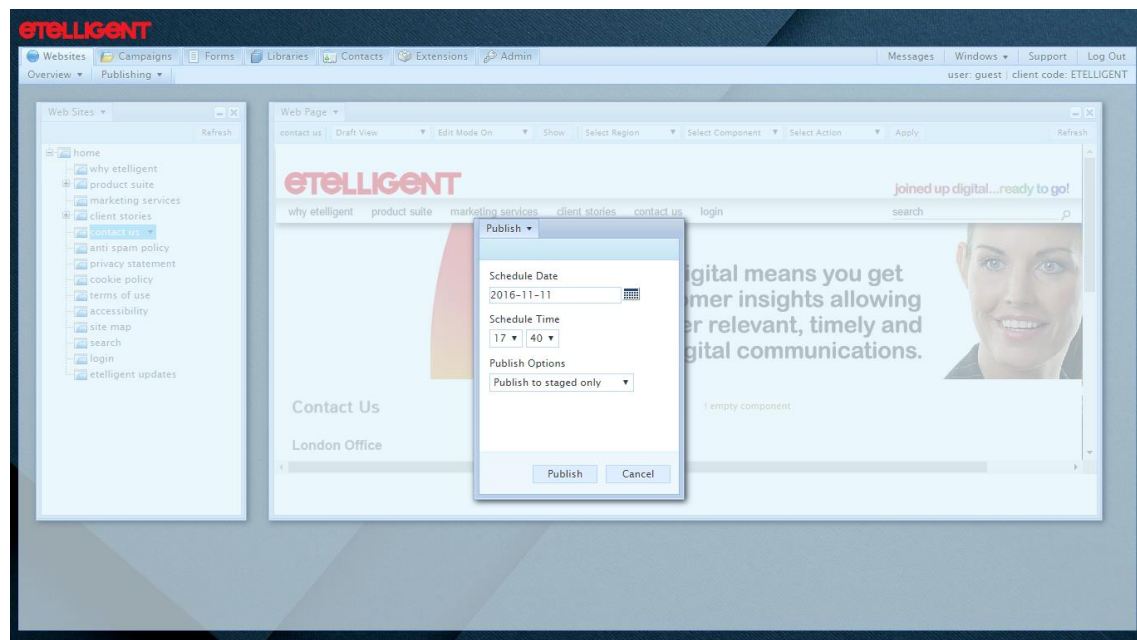
3. Click on **View Websites**
4. Use the plus icons if necessary to navigate to a page that you wish to edit
5. Click on the name of the page



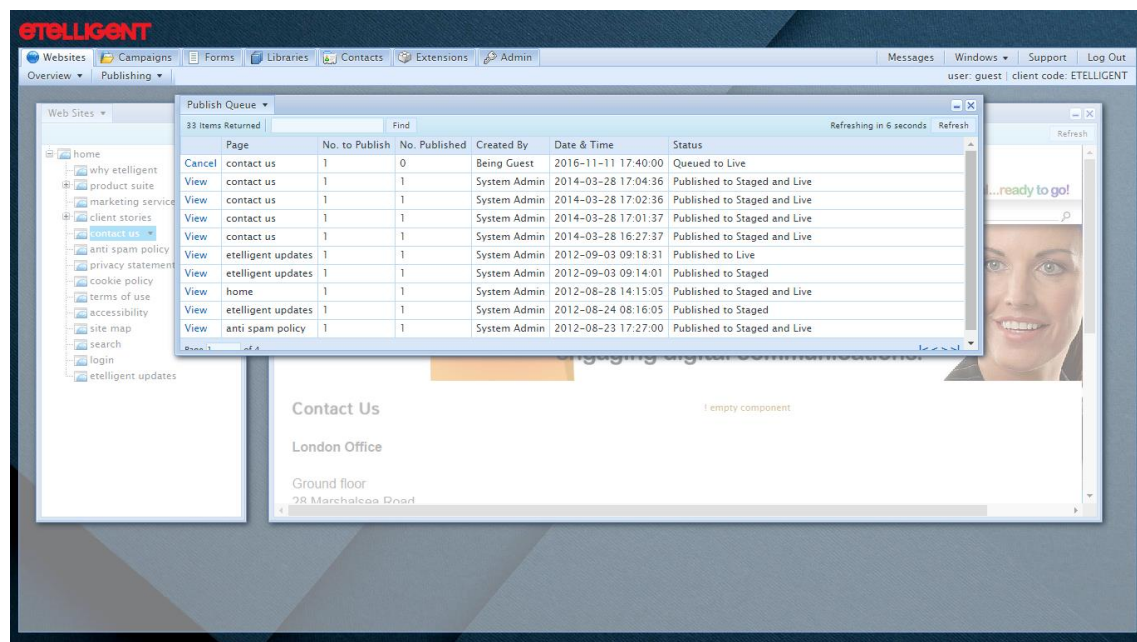
6. Click on Edit



7. Click on **Web Page** (the Window Title Button)
8. Click on **Publish Page** from the drop-down menu



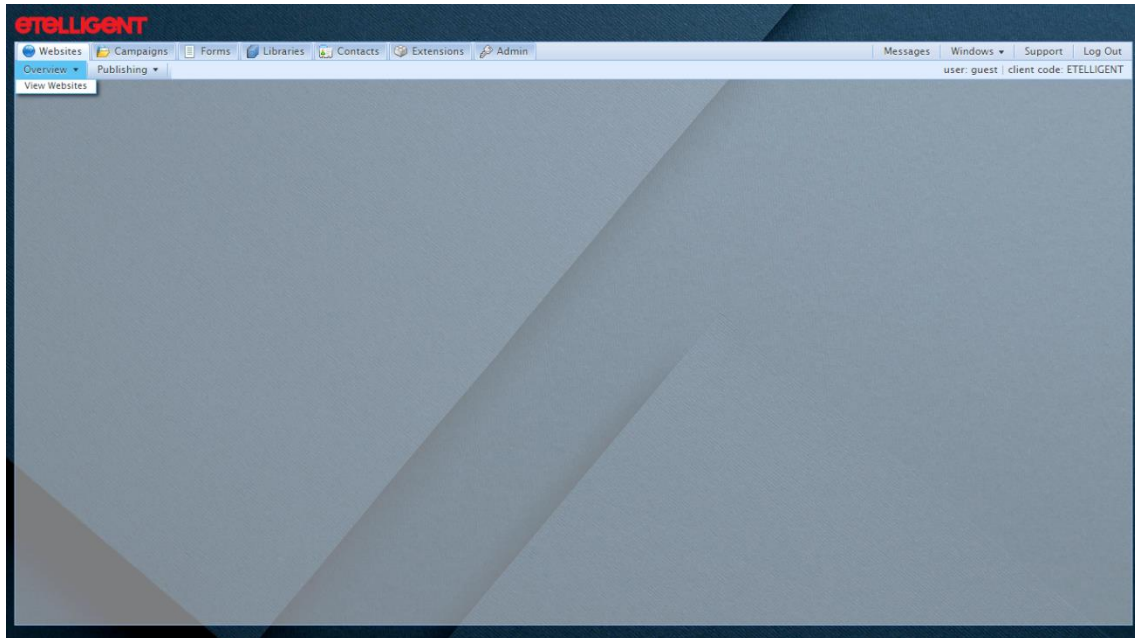
9. Select the correct Publish Options and click Publish



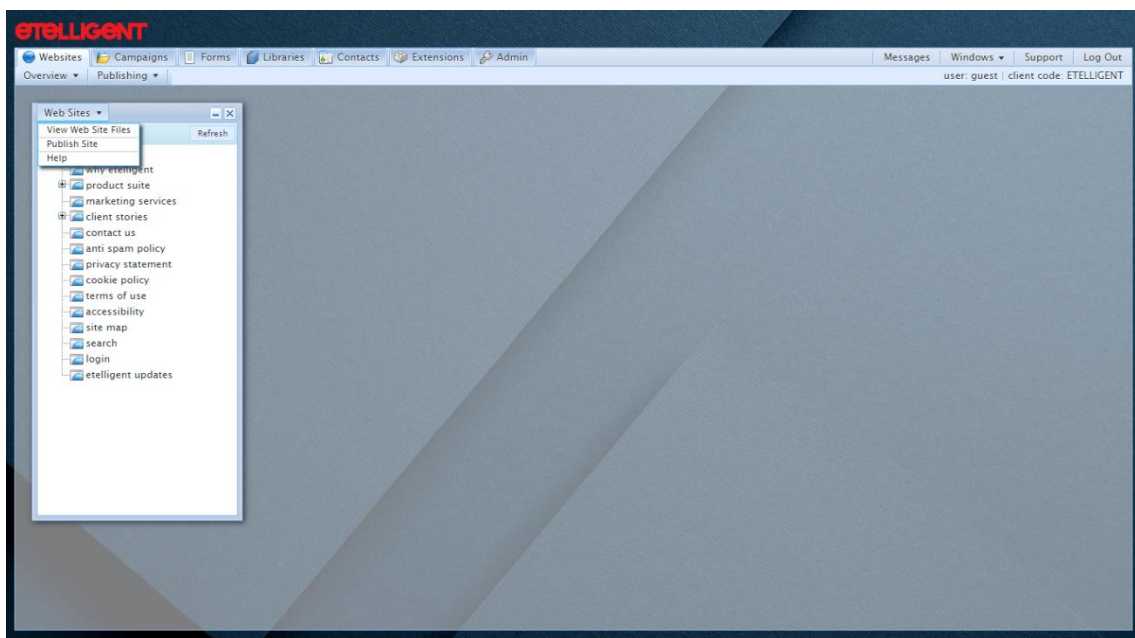
10. After a while the Publishing Status (not to be confused with the Page Status discussed above) will change to Published when the page has completed the publishing process.

Publishing the entire Web Site

1. Click on the **Websites** tab
2. Click on **Overview**



3. Click on **View Websites**
4. Click on **Web Sites**



5. Click on **Publish Site**
6. Select the correct Publish Options and click **Publish**

The publishing will show progress as the publishing process completes.

Extensions

Etelligent Extensions are modules of functionality that perform a specific task across the Web site. Examples of these include Member's areas, secure document management, or the handling of events. They are perhaps best illustrated by consideration of arguably the most common example - News.

Most Web sites will wish to dedicate an area in which visitors can find keep up to date with what is happening within the organisation.

Etelligent Extensions allow for the content of the News to be presented in many forms across the Website or even into other channels e.g. email newsletters. This mechanism allows for content to be managed in one location and consumed by the end-user via whichever channel is most suitable e.g. email, web site or RSS.

As has been suggested above Etelligent Extensions are made up of two parts: Content and Components. Forms-based management exists to populate and edit the content whereas components are generated from 'Widgets' which specify the fields and layout of the news content.

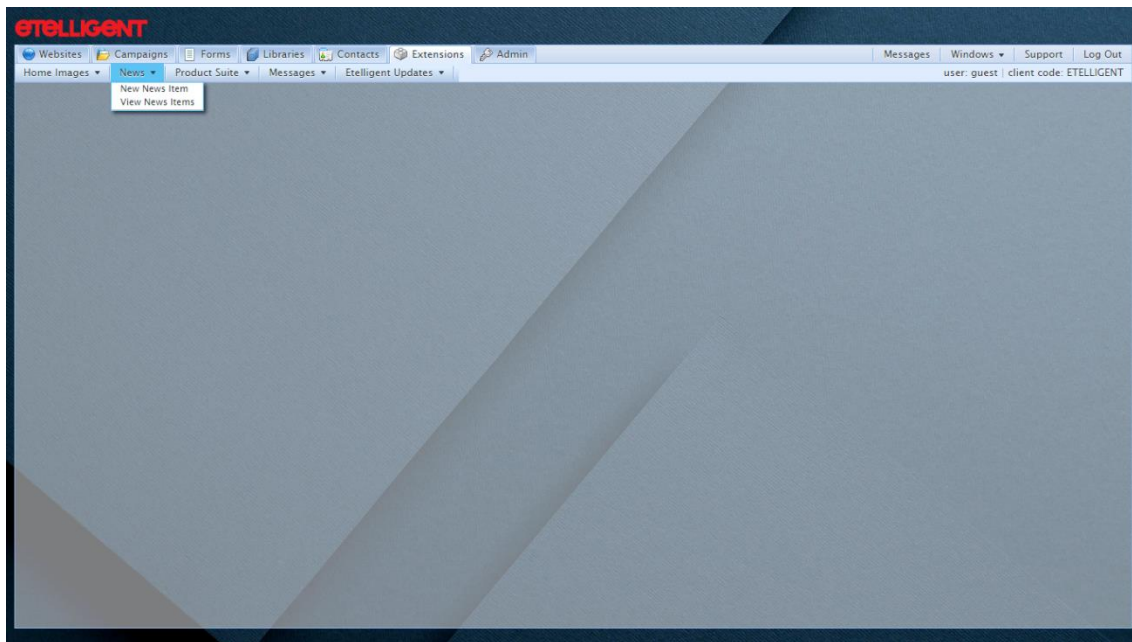
Adding a new item

Note

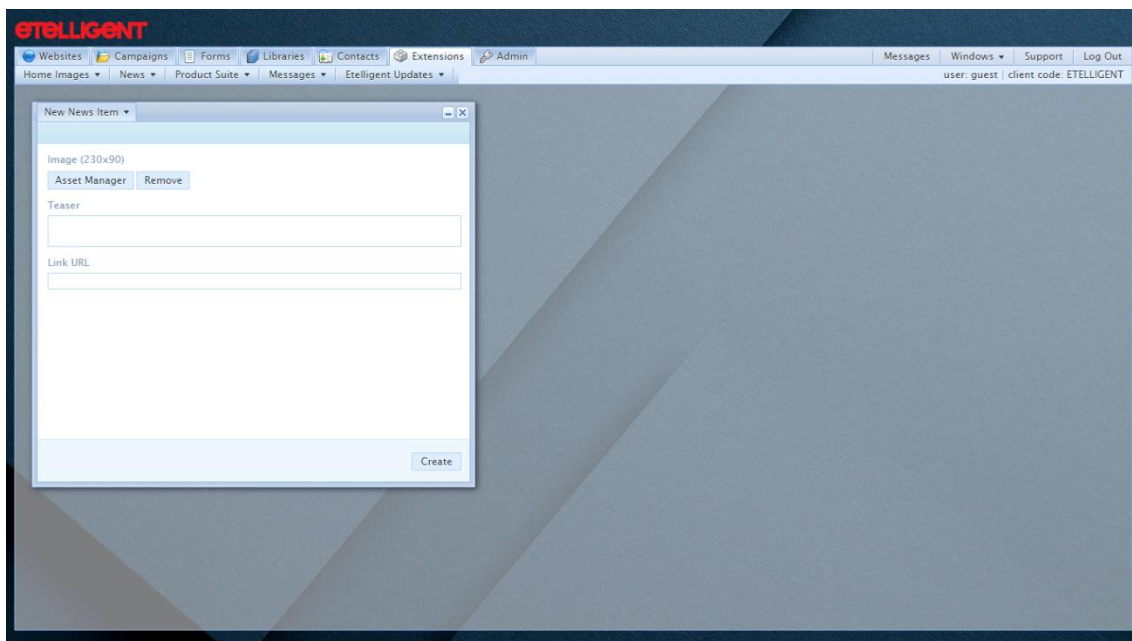
All Extensions in Etelligent are managed in the same way.

To illustrate how to add a new item, the News Extension example will be used.

1. Click on the **Extensions** tab
2. Click on **News**



3. Click on **New News Item**



4. Complete the form
5. Click on **Create**

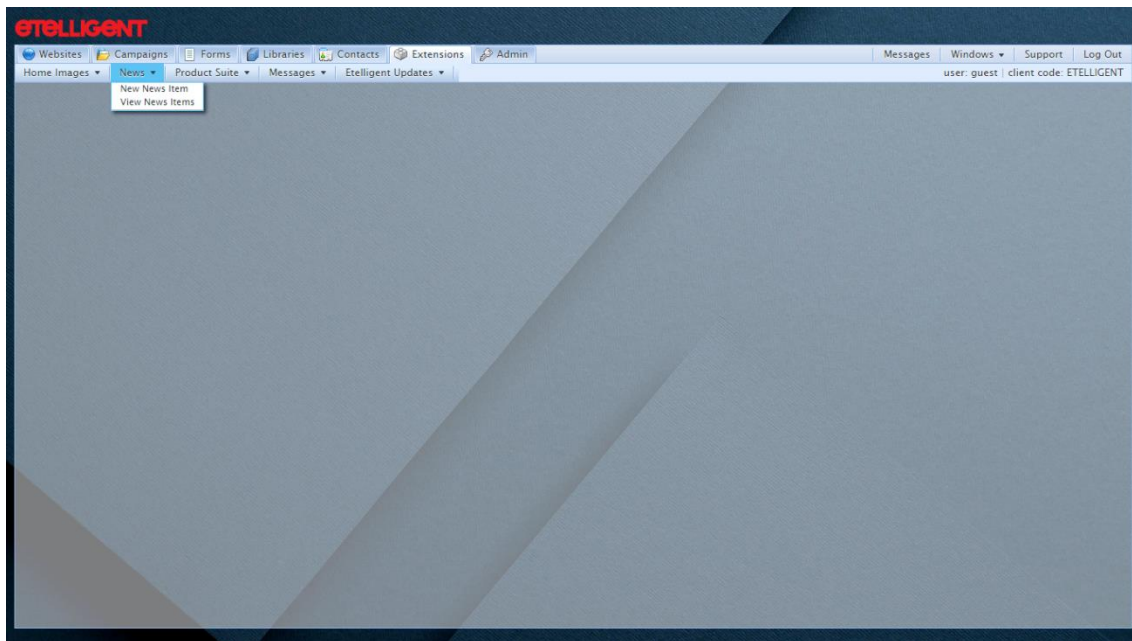
Editing an item

Note

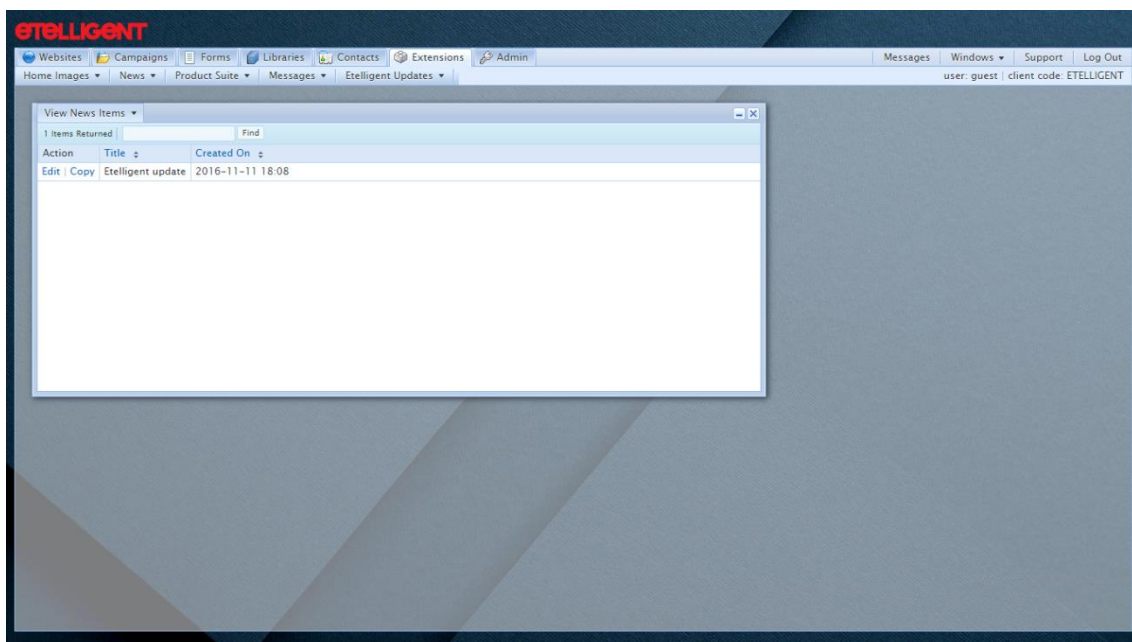
All Extensions in Etelligent are managed in the same way.

To illustrate how to add a new item, the News Extension example will be used.

1. Click on the **Extensions** tab
2. Click on **News**



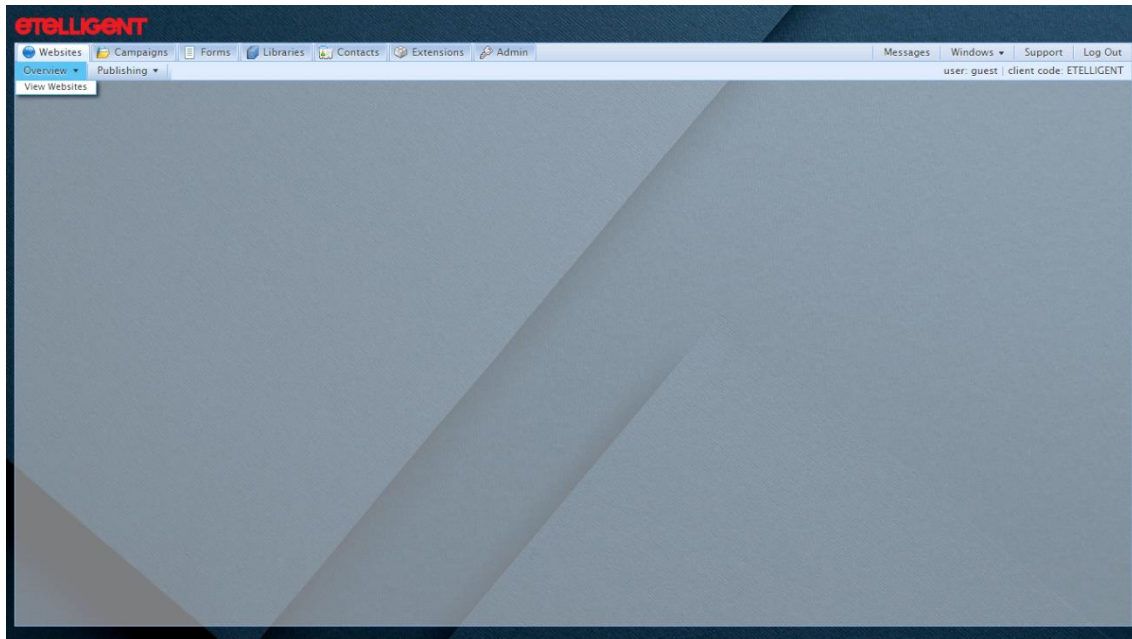
3. Click on **View News Items**



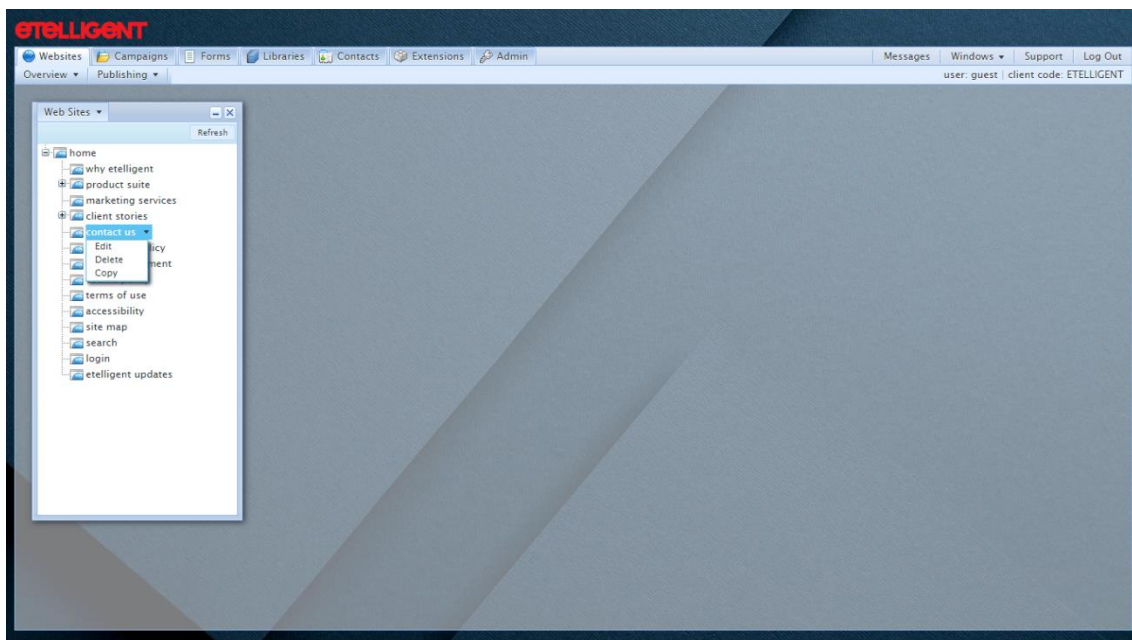
4. Complete on **Edit** beside the item you wish to edit
5. Complete the form and click on **Save**

Adding the extension component to a page

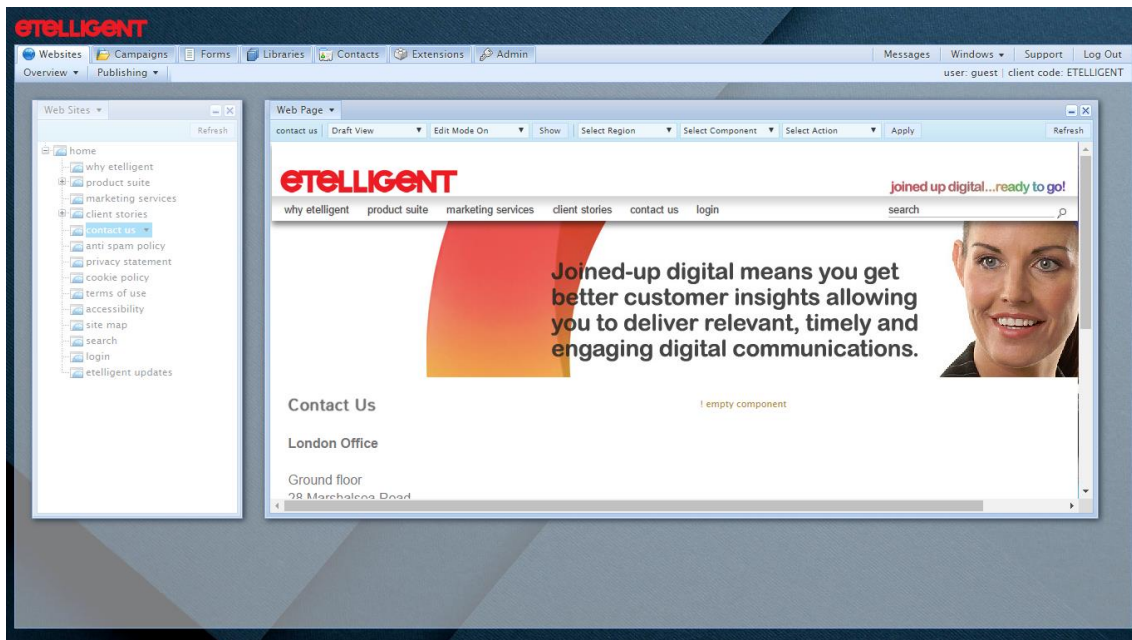
1. Click on the **Websites** tab
2. Click on **Overview**



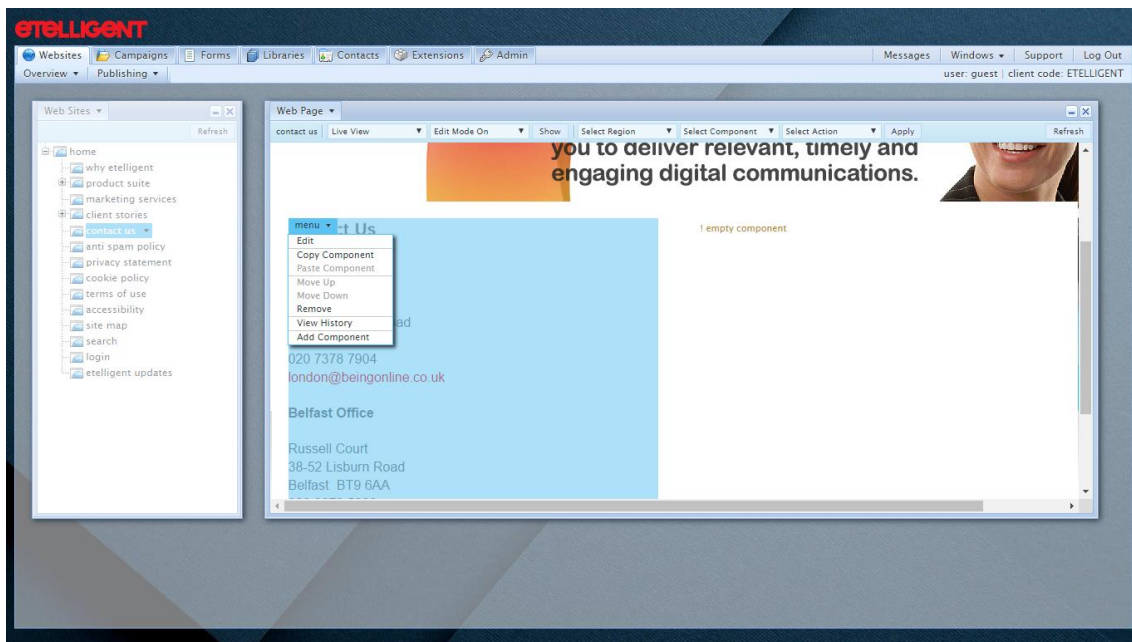
3. Click on **View Websites**
4. Use the plus icons if necessary to navigate to a page that you wish to edit
5. Click on the name of the page



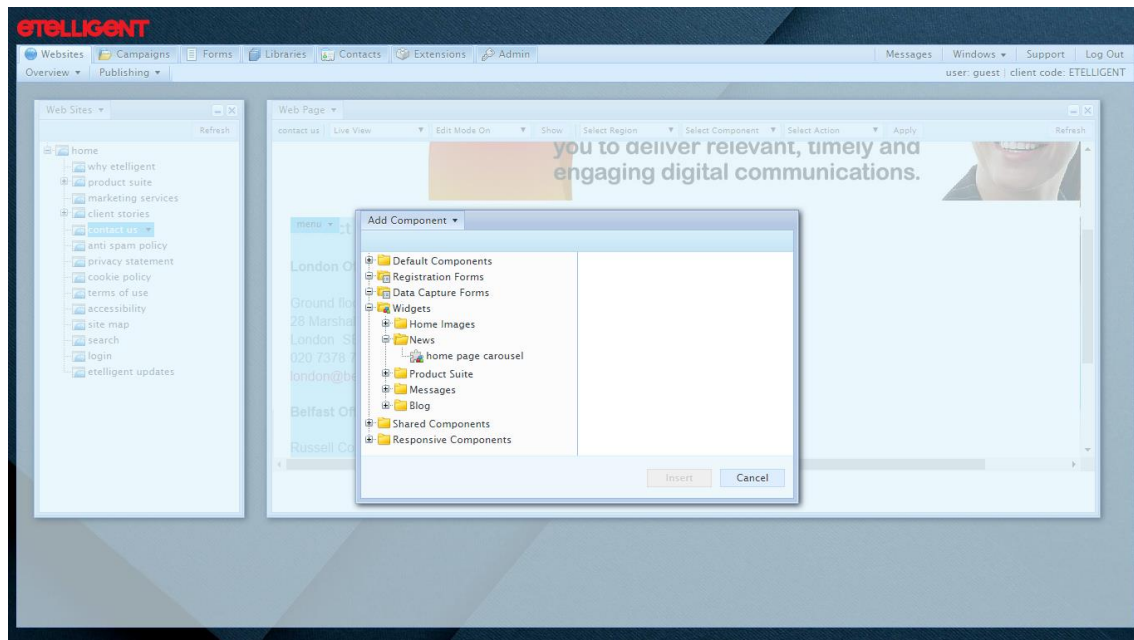
6. Click on **Edit**



7. Moving the mouse over a component will select it. The component is highlighted by an overlay which contains a menu button.
8. Select the component you wish to add the new component before
9. Click the **menu** button



10. Click on **Add component**
11. Navigate to the Widgets folder (Each Extension has its own folder)



12. Use the plus icons if necessary to navigate to the component to be inserted
13. Click on the name of the component
14. Click **Insert**
15. The page will reload with the new component added

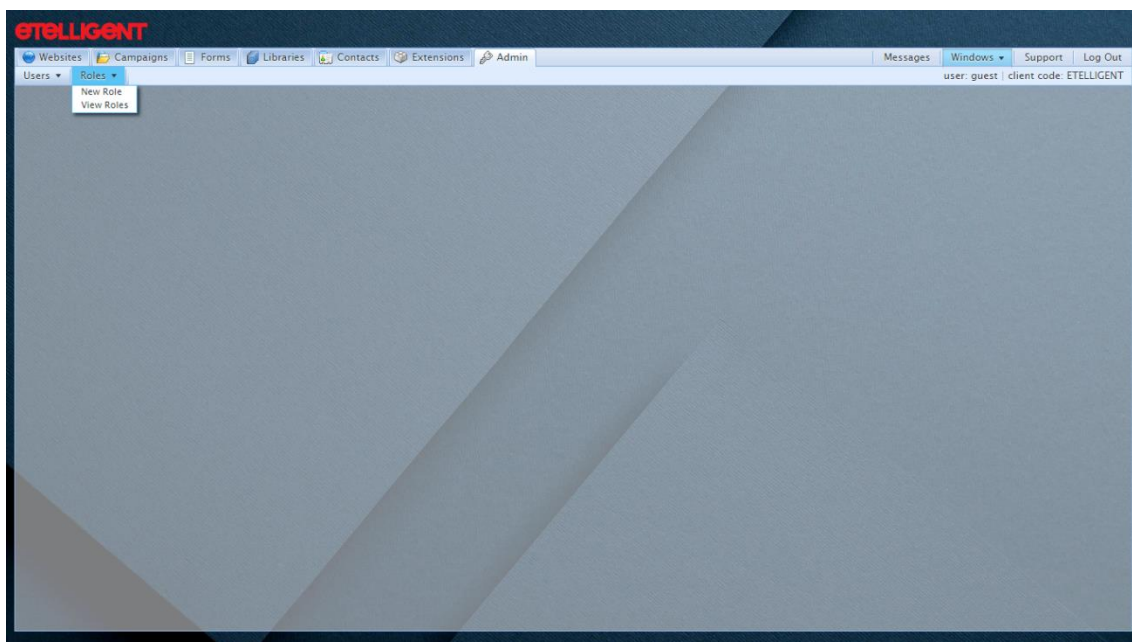
Administration

Etelligent allows for multiple users to be able to log in to the system. Each user is assigned to a specific role which can be defined by the Administrator.

The Administrator role allows for the creation of other roles perhaps with more restrictions. For example, a role could be created for Editors which would not permit publishing of pages, thereby enabling a sign-off process to be accommodated.

Adding a new role

1. Click on the **Admin** tab
2. Click on **Roles**



3. Click on **New Role**

ETELLIGENT

Web Sites Campaigns Forms Libraries Contacts Extensions Admin Messages Windows Support Log Out

Users Roles user: guest client code: ETELLIGENT

New Role

Role Properties

Role Name

Publish To Live

☐ yes ☐ no

Live Email Sending

☐ yes ☐ no

Live Email Sending Requires Approval

☐ yes ☐ no

Navigation Display

Create Cancel

- Complete the form (click on **Navigation Display** to reveal options to specify what navigation (tabs) users belonging to this role can see)

ETELLIGENT

Web Sites Campaigns Forms Libraries Contacts Extensions Admin Messages Windows Support Log Out

Users Roles user: guest client code: ETELLIGENT

New Role

Role Properties

Navigation Display

☐ Extensions

☐ Campaigns

☐ Websites

☐ Libraries

☐ Contacts

☐ Admin

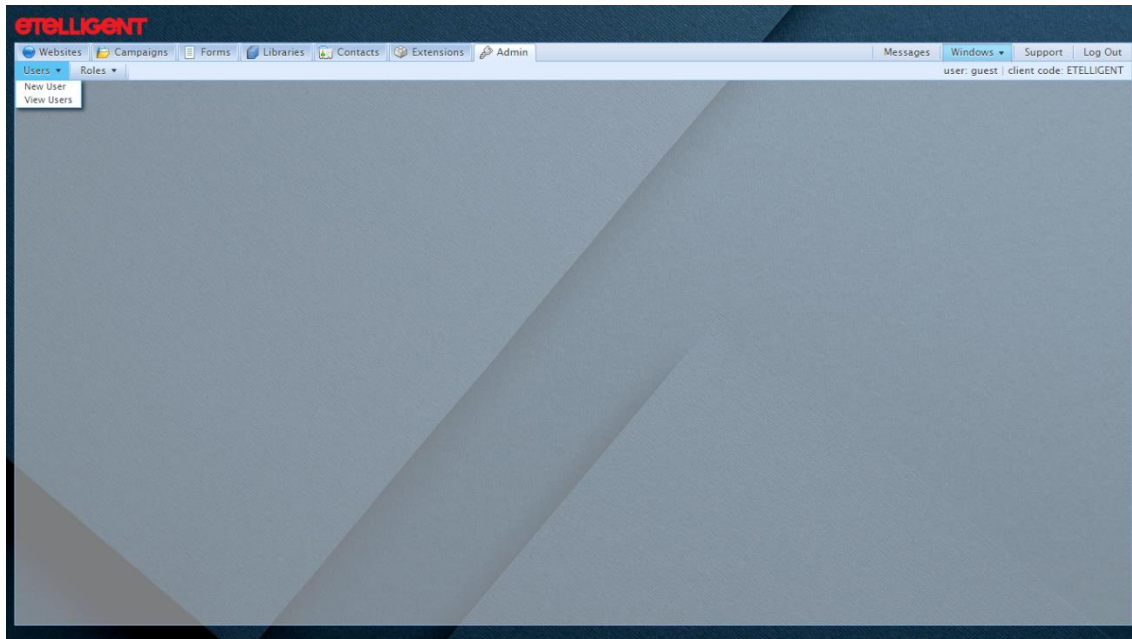
☐ Forms

Create Cancel

- Click **Create**

Adding a user

1. Click on the **Admin** tab
2. Click on **Users**



3. Click on **New User**

A screenshot of the ETELLIGENT web application's Admin interface, showing the 'New User' form. The form is a modal window with the following fields: Title (dropdown), First Name (text input), Surname (text input), Email Address (text input), Contact Phone Number (text input), Role (dropdown), and User Name (text input). At the bottom right of the form are 'Create' and 'Cancel' buttons. The background shows the same Admin interface as the previous screenshot, with the 'New User' option selected in the Users dropdown.

4. Complete the form choosing which Role to assign this user to
5. Click **Create**

