

Using your content management system



EXPRESSIONENGINE CMS DOCUMENTATION BY KINOLI



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What is ExpressionEngine?

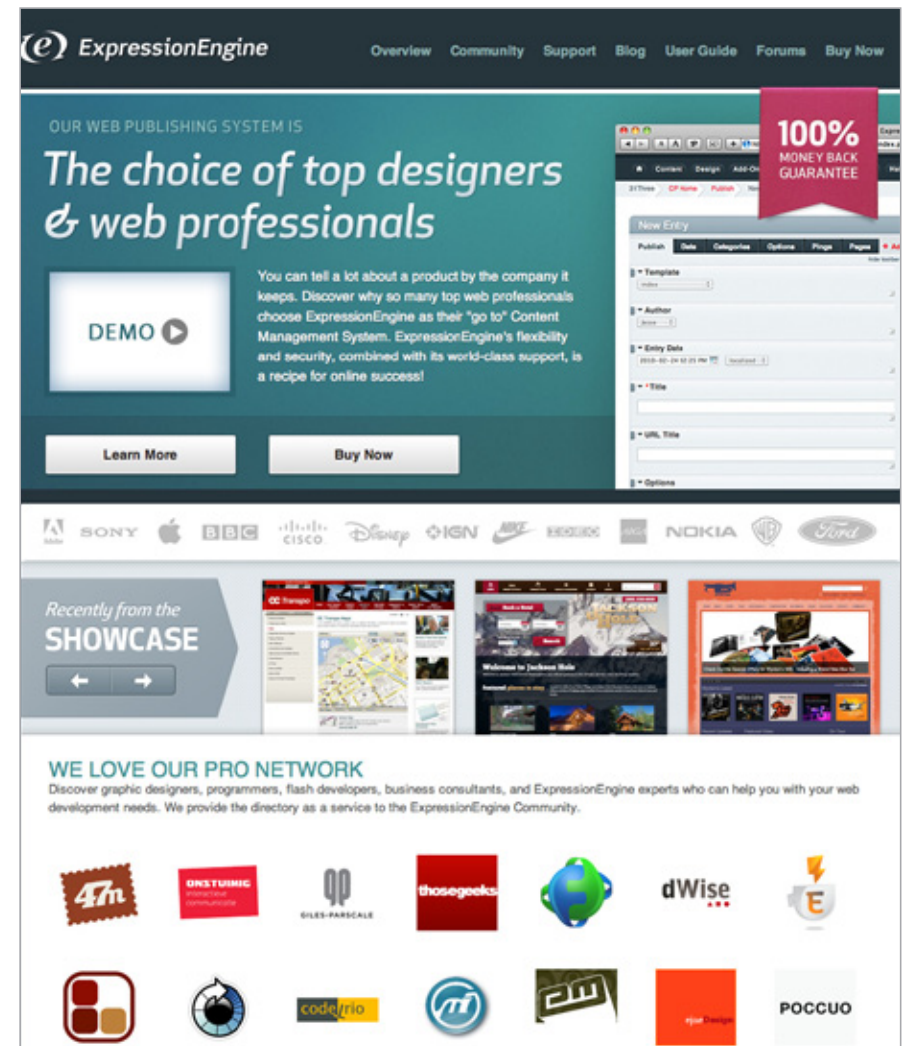
ExpressionEngine is a flexible, feature-rich content management system that empowers thousands of individuals, organizations, and companies around the world to easily manage their website.

ExpressionEngine is modular by design, enabling you to easily add new features and capability with add-on modules, plugins, and extensions. Included by default are 17 add-on modules, access to over 100 plugins, and dozens of extension hooks.

ExpressionEngine is the choice of top web professionals.

You can tell a lot about a product by the company it keeps. Nearly half of ExpressionEngine's users are web designers who make this CMS the de-facto choice for their own client's websites. Many of these designers, *Kinoli included*, are members of the professional network, which helps connect clients with ExpressionEngine experts. In this way, you are not bound to one development company should you ever decide to further develop your ExpressionEngine website.

ExpressionEngine is a product developed and supported by EllisLab, a US based company. It is also supported by a world-wide community of third party developers who create add-ons and then share them on the web.



<http://expressionengine.com>

Logging in

How ExpressionEngine works

ExpressionEngine, or EE, is a system developed using PHP with a MySQL database. Don't worry, you only need to know that if someone asks. Think of it this way; Although underneath the hood, EE is incredibly complex, you only need to know how to use it, no more than a motorist simply needs to know how to drive a car, not fix one. We have installed it on your hosting account, and give you access to log in and start managing your sites content. If you ever need support, or would like to expand your site's functionality in some way, you simply can contact Kinoli, or another EE developer. Heck, if you've got the chops, you can jump in and start coding yourself!

Your login information

Click on the link to the control panel, and you will be presented with a login screen (Fig.1a). Enter your username and password to continue. If you ever forget or lose your password, just click the link and follow the instructions.

The control panel home page

After you log in, you'll see a page similar to the one pictured in Fig.1b. It will show you the latest entries, and optionally, you can write notes that are just there for you to reference (they don't get published anywhere on your site). For example, you could write a note; "Finish contact copy"

Your Google Analytics

On the login screen you can view your latest google analytics data showing recent activity to your website.

YOUR LOGIN INFO

<http://yoursite.com/system>

Username: `admin` Password: `pa$$w0rd`

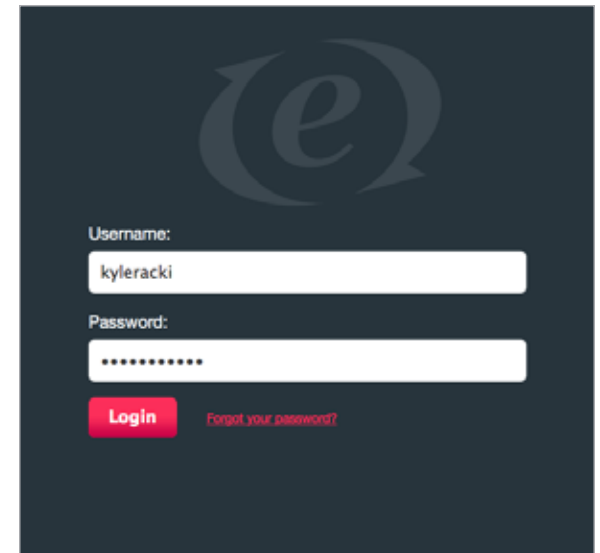


Fig.1a



Creating and Editing Content

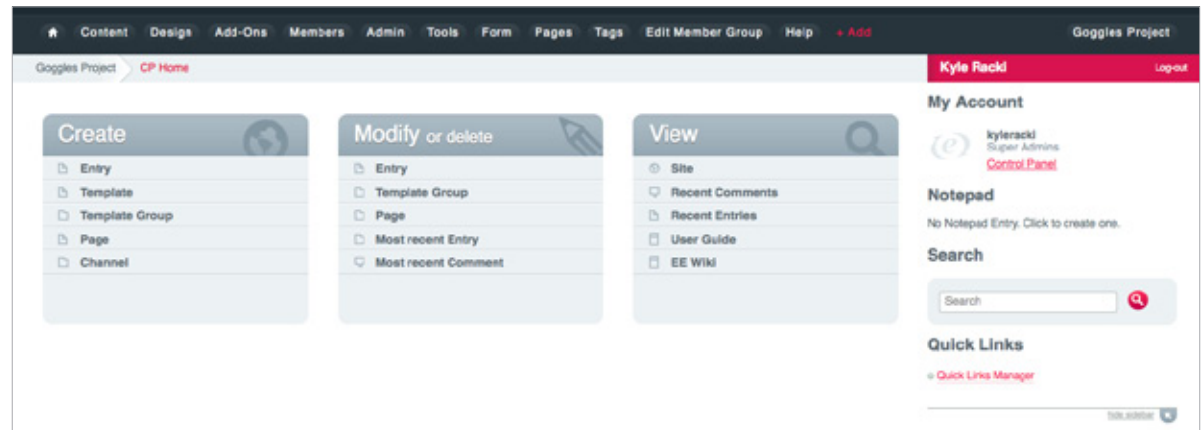
Publishing Entries

When you want to create a page or article, you can click on the Content > Publish which will show a drop down of the various “channels” or sections to publish entries to. Choose the appropriate section. It will take you to an edit screen where you will add your content (see page 8 for more detail).

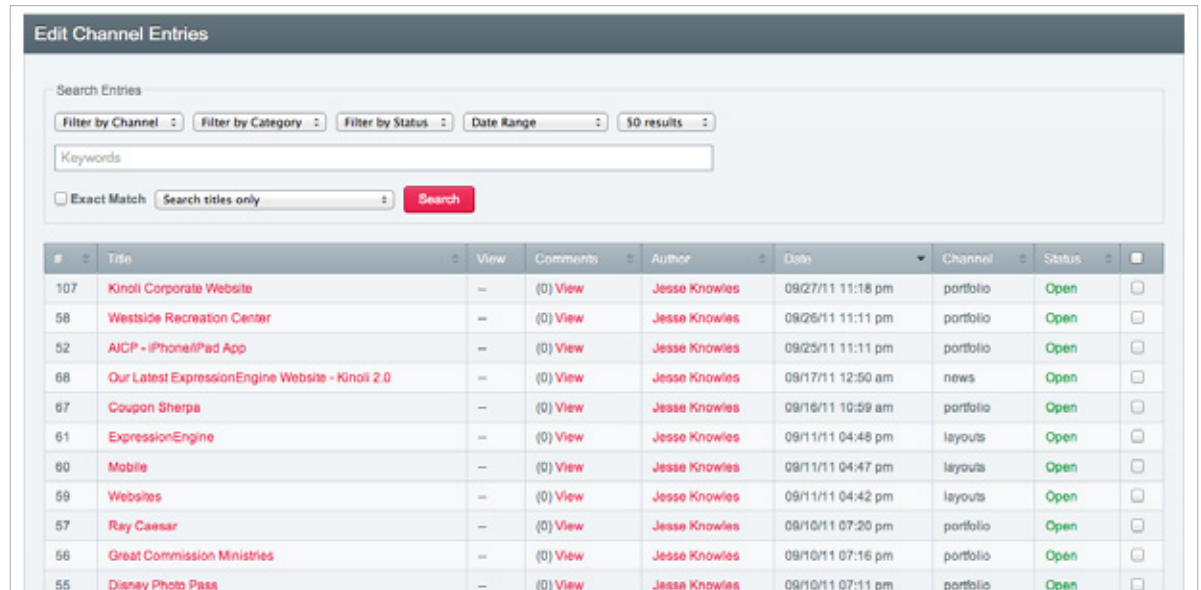
Editing Existing Entries

To edit existing entries, or articles, click on Content > Edit. The Edit screen shows a table view of all of the entries on the site. If your site has multiple sections, you can use the filter form to narrow down the entries. If you only want to see entries from one particular channel, category, status or date range, you can define all of that in the filter form. You can even type in keywords to pinpoint the exact entry you’d like to edit.

Clicking on the entry title will take you to the entry edit form where you can change the content for that entry.



The Edit screen




#	Title	View	Comments	Author	Date	Channel	Status	
107	Kinoli Corporate Website	--	(0) View	Jesse Knowles	09/27/11 11:18 pm	portfolio	Open	<input type="checkbox"/>
58	Westside Recreation Center	--	(0) View	Jesse Knowles	09/26/11 11:11 pm	portfolio	Open	<input type="checkbox"/>
52	AICP - iPhone/iPad App	--	(0) View	Jesse Knowles	09/25/11 11:11 pm	portfolio	Open	<input type="checkbox"/>
68	Our Latest ExpressionEngine Website - Kinoli 2.0	--	(0) View	Jesse Knowles	09/17/11 12:50 am	news	Open	<input type="checkbox"/>
67	Coupon Sherpa	--	(0) View	Jesse Knowles	09/16/11 10:59 am	portfolio	Open	<input type="checkbox"/>
61	ExpressionEngine	--	(0) View	Jesse Knowles	09/11/11 04:48 pm	layouts	Open	<input type="checkbox"/>
60	Mobile	--	(0) View	Jesse Knowles	09/11/11 04:47 pm	layouts	Open	<input type="checkbox"/>
59	Websites	--	(0) View	Jesse Knowles	09/11/11 04:42 pm	layouts	Open	<input type="checkbox"/>
57	Ray Caesar	--	(0) View	Jesse Knowles	09/10/11 07:20 pm	portfolio	Open	<input type="checkbox"/>
56	Great Commission Ministries	--	(0) View	Jesse Knowles	09/10/11 07:16 pm	portfolio	Open	<input type="checkbox"/>
55	Disney Photo Pass	--	(0) View	Jesse Knowles	09/10/11 07:11 pm	portfolio	Open	<input type="checkbox"/>

Deleting Entries

If you'd like to delete one or more entries, click on the check box next to the entry you want to delete. You can click on multiple checkboxes to delete multiple entries.

Once the entries are checked, scroll to the bottom of the page. In a drop down menu, select Delete Selected and click Submit. There is a confirmation page. Click to confirm the deletion.

You can also use the drop down menu to edit multiple entries at once. Once you've checked off the entries you want to edit, selected Edit Selected from the dropdown and clicked Submit, you can change multiple entries titles, url titles, status, entry date and other options all from one handy spot. When you are done, click Update to save the changes.



152	McGill04	--	(0) View	Michiel	09/28/10 01:34 am	videos	Open	<input type="checkbox"/>
150	McGill02	--	(0) View	Michiel	09/28/10 01:32 am	videos	Open	<input type="checkbox"/>
149	McGill01	--	(0) View	Michiel	09/28/10 01:29 am	videos	Open	<input type="checkbox"/>
148	Concordia01	--	(0) View	Michiel	09/28/10 01:26 am	videos	Open	<input type="checkbox"/>
147	UofT01	--	(0) View	Michiel	09/28/10 01:25 am	videos	Open	<input type="checkbox"/>
146	Carleton03	--	(0) View	Michiel	09/28/10 01:25 am	videos	Open	<input type="checkbox"/>
145	Carleton02	--	(0) View	Michiel	09/28/10 01:24 am	videos	Open	<input type="checkbox"/>
144	Carleton01	--	(0) View	Michiel	09/28/10 01:12 am	videos	Open	<input type="checkbox"/>
88	University of Waterloo	--	(0) View	Kyle Rackl	09/27/10 09:32 pm	events	Open	<input type="checkbox"/>
87	University of Waterloo	--	(0) View	Kyle Rackl	09/27/10 09:32 pm	events	Open	<input checked="" type="checkbox"/>
86	University of Guelph	--	(0) View	Kyle Rackl	09/27/10 09:29 pm	events	Open	<input type="checkbox"/>
85	University of Guelph	--	(0) View	Kyle Rackl	09/27/10 09:29 pm	events	Open	<input checked="" type="checkbox"/>
143	Megaphone in the House!	--	(0) View	Tara	09/27/10 06:17 pm	blog	Open	<input type="checkbox"/>

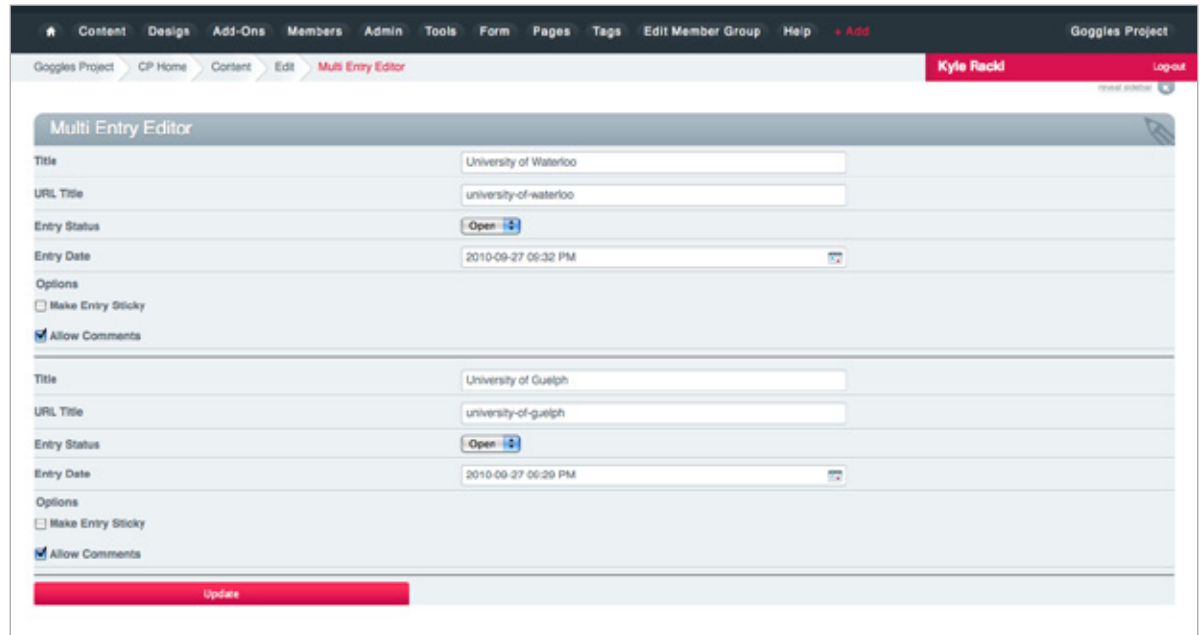
Showing 1 to 50 of 140 entries

autosaved data available

Submit Delete Selected

ExpressionEngine Info

The screen where you can edit multiple entries at once



Content Design Add-Ons Members Admin Tools Form Pages Tags Edit Member Group Help + Add Goggles Project

Goggles Project CP Home Content Edit Multi Entry Editor Kyle Rackl Logout

Multi Entry Editor

Title: University of Waterloo

URL Title: university-of-waterloo

Entry Status: Open

Entry Date: 2010-09-27 06:32 PM

Options

Make Entry Sticky

Allow Comments

Title: University of Guelph

URL Title: university-of-guelph

Entry Status: Open

Entry Date: 2010-09-27 06:29 PM

Options

Make Entry Sticky

Allow Comments

Update



Structure Pages

The Structure module allows you to easily manage “static” entries on the site, or in other words, pages that don’t frequently change, like About or Contact Us.

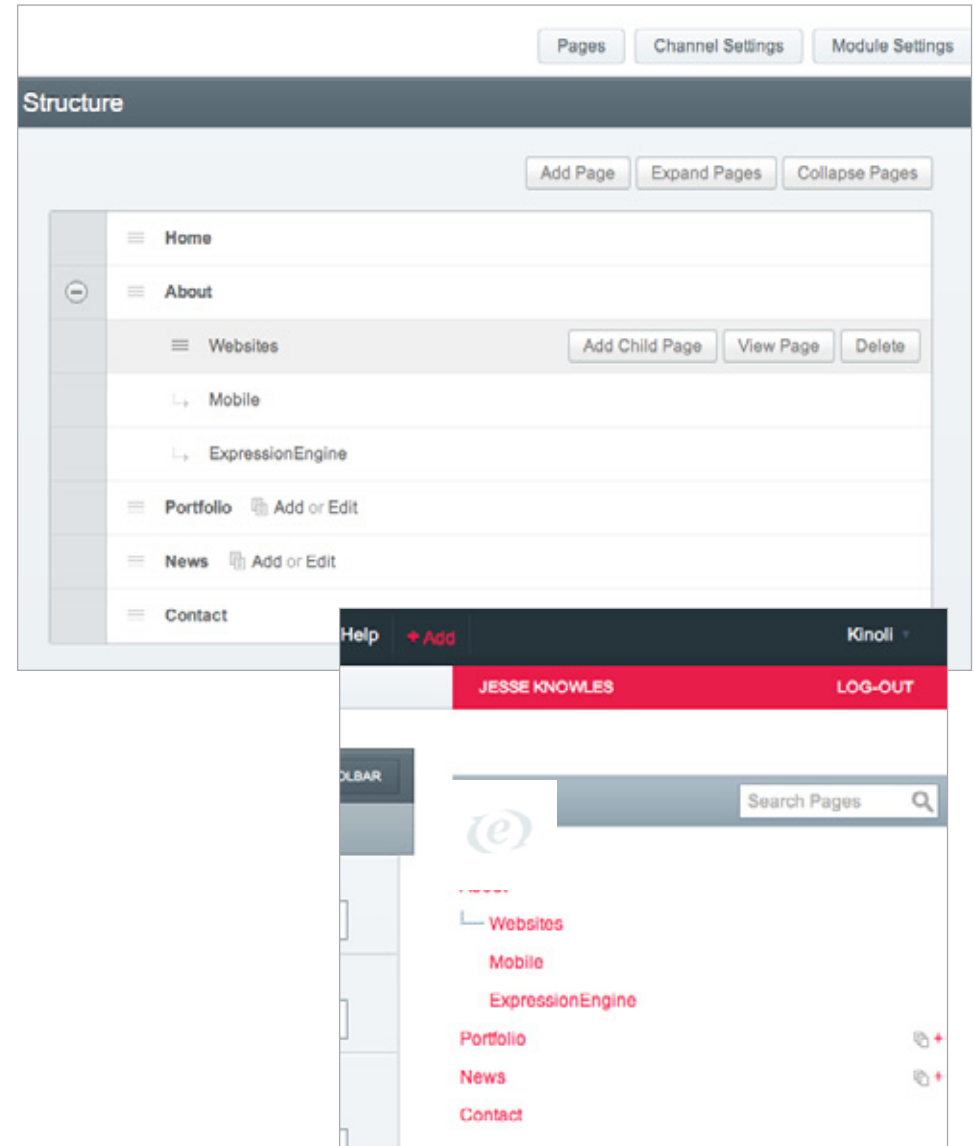
You can easily re-order navigation items by moving the mouse over to the left of the title (the cursor will change to a hand icon) and then clicking and dragging the order of the nav item. You can optionally drag sub pages outside or within other pages so that they become either parent or child navigation items. You can optionally delete a page by clicking the Delete button which appears when you move your mouse over a nav item.

You can add a new page by clicking “Add Page” at the top right of the module. This will take you to a basic channel entry editing page. Once you save the entry, go back to the structure module and you will see the page you just added now as a parent nav item. You can also add a child page (ie: a sub page within a main nav item) by rolling over the parent page, you will notice “Add Child Page” appears. Click to create the sub page.

You may see a section below the structure pages called “Assets”. Assets are blocks of content that do not belong to a single page and may appear multiple times throughout the site, perhaps in the header, footer, sidebar or home page only. By clicking the Edit button next to the channel under Assets, you will go to the channel edit view, which will be filtered to reveal only entries in the channel associated with assets. In other words, clicking Edit will reveal all of the call-outs on the site, which you can click on to edit.

Sidebar Panel

To quickly find a static page to edit you can click the ‘Pages’ bar in the right-hand sidebar and then click on the page you want to modify.



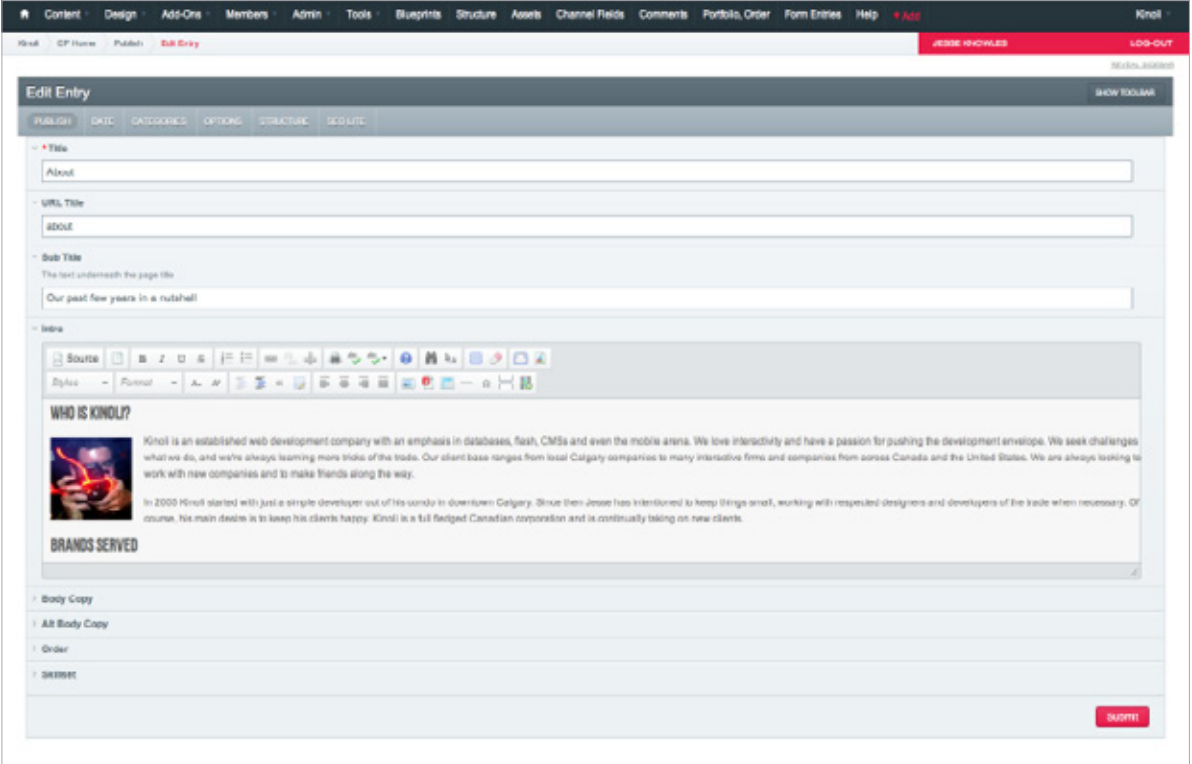
Entry View

Titles

As soon as you publish a new page within an ExpressionEngine “channel” or section, the first thing you’ll usually do it give the entry a title. This title is very important, as it is what you will use not only to recognize the entry within ExpressionEngine, but it is usually the headline or title of the page in the front-end of the site. It also is often used in the title tags which appear at the top of your browser window when on that page.

URL Title

URL Titles get dynamically created as you type in the Title field. URL Titles are all lowercase and spaces appear as dashes or underscores. URL Titles will appear within the URL bar in the browser and can be useful to users. Eg: Within the URL, `www.mysite.com/blog/entry/my-article-title/` the segment “my-article-title” would be the URL Title.



Custom Fields

When your developer built your site within ExpressionEngine, he or she may have created a series of custom fields, fields unique to your website, above and beyond simply the Title and URL Title fields. These custom fields come in a variety of forms, such as check-boxes, file upload buttons (see page 10), dropdowns, or simple text input fields. The purpose of these fields are usually self-evident or are described by the fields title and/or description directly within ExpressionEngine.



Content Editor

The content editor in ExpressionEngine is a “WYSIWYG” editor (What you see is what you get). In other words, when you format text within the editor, it hides the HTML from you so you only see the formatting and no code. This can save time and is easier for non-technical administrators.

The following are buttons within the editor that you may use to format your text:

Bold

To be used within paragraphs for bolding text. For headings, use the format drop down.

Italics

For italicising words or phrases within a paragraph.

Underline

Used for underlining words or phrases for emphasis.

Strike Through

Puts a line through text that has been edited.

Ordered List

A list of items where you want numbers added automatically.

Unordered List

A simple, bulleted list.

Decrease/Increase Indent

Used for indenting text.

Block Quote

Useful for pull quotes, or testimonials.

Link/Unlink

Highlight a portion of text, and then click the link button to make the text link to another page on the web.

Anchor

Adds an invisible anchor which can be linked to from anywhere to move users to a

particular part of the page.

Image

Allows you to upload an image from your computer or insert an image already on the web server. (See page 11)

Flash

Insert a URL to a Flash file anywhere on the web and this will display the Flash file on the page.

Table

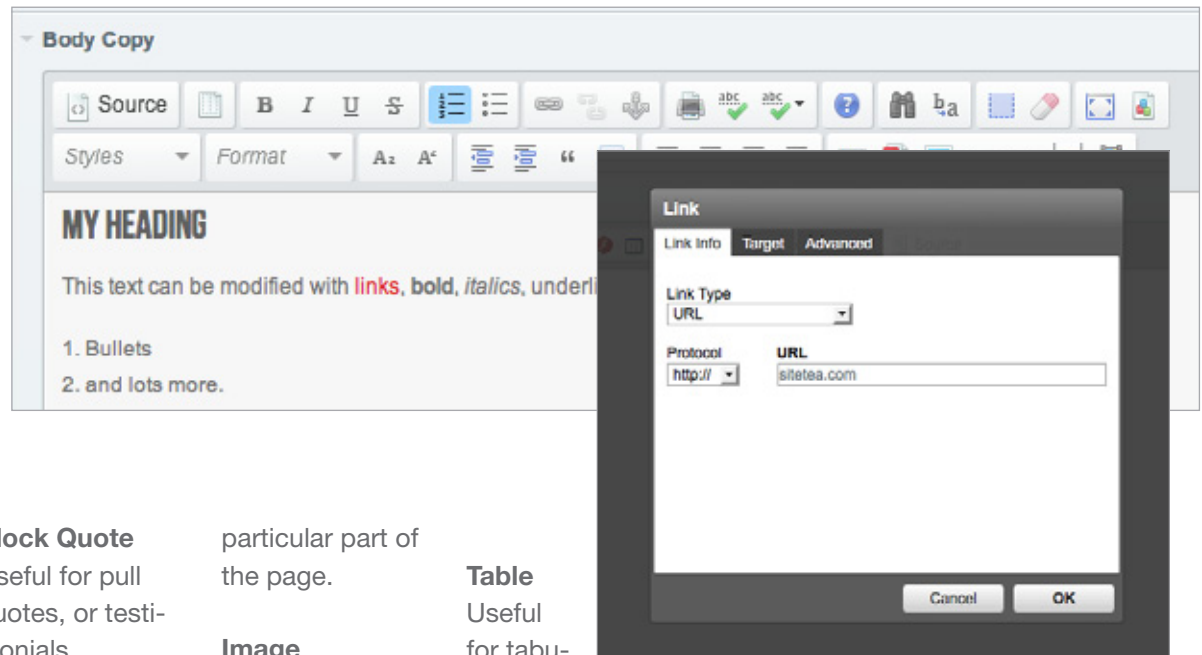
Useful for tabular data. For advanced admin users.

Horizontal Line

Adds a simple horizontal line. Can be used to separate paragraphs of text.

Smiley

Pick from a list of emoticons which get added as images.



Insert Special Character

Useful for adding things like trademark and copyright symbols.

Source

Click to view the HTML source code. Useful for debugging.

Insert Page Break for Printing

Inserts and invisible line that will force a new page when being printed to avoid awkward breaks.

Format

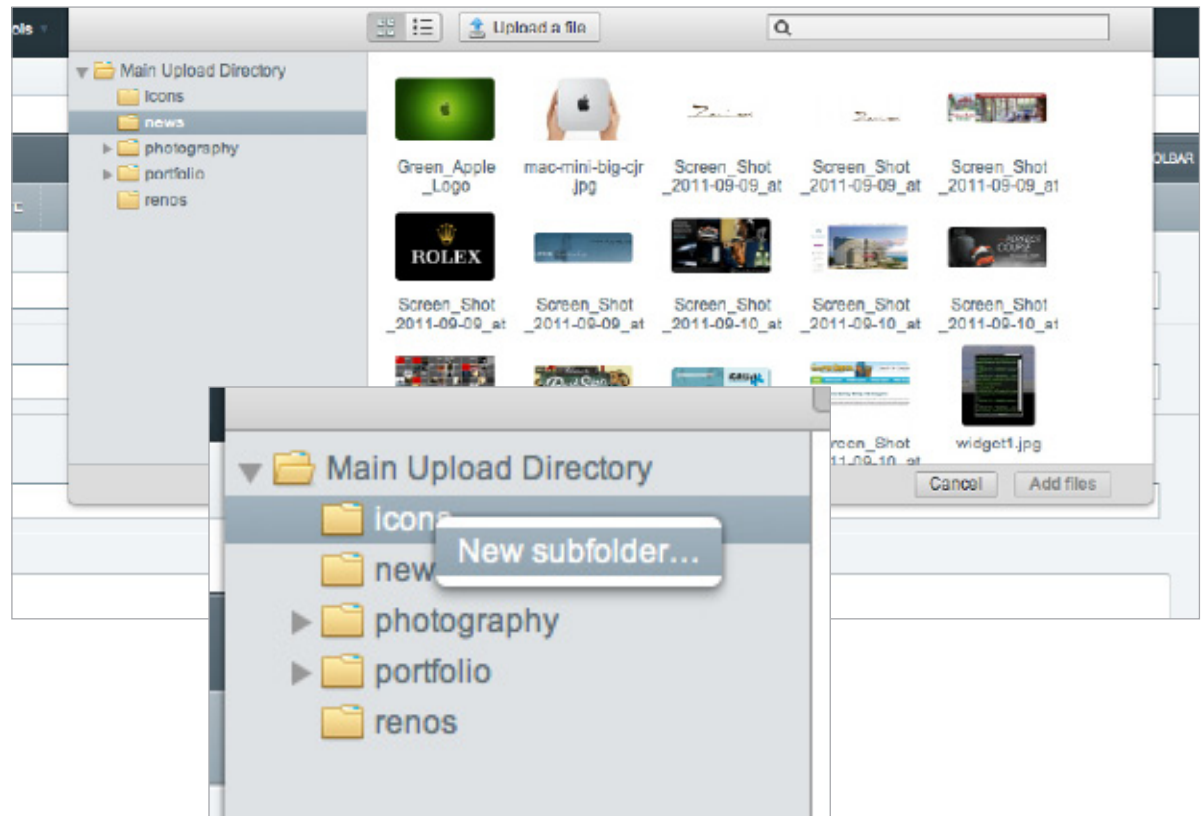
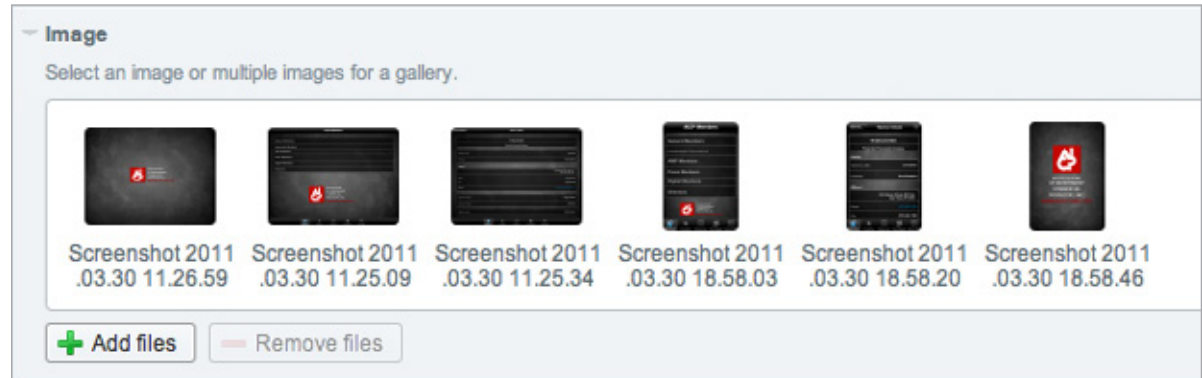
Appears as a drop down menu with ‘Normal’ displayed. This is to be used to style headings and sub headings.

Placing images and PDF files in their own custom field


If there is a file field set up, you can add a file (image or PDF) to the entry. Click on “Add File” and it will bring up the File Manager. You can upload a file using the ‘Upload a file’ button, select the file from your computer and click “Upload”. Be patient, especially if it’s a large file. After the file has successfully been uploaded, you will see it in your file assets directory. You can right click on the left hand directory list to add new sub directories.

If the file you want to add to the field is already on the web server, then click on the Main Uploads tab. This will show all of the images and PDF’s that have been uploaded already. Simply click on a thumbnail to add that image or PDF to the field.

It helps to avoid uploading large file sizes to your web server. If you have a large jpg that is over 1000 pixels wide, try editing it on your computer using image editing software before uploading it through ExpressionEngine, as this will avoid a lot of needless problems. Try to keep PDF’s under a meg if possible and keep images to only no more than a few hundred kilobytes.

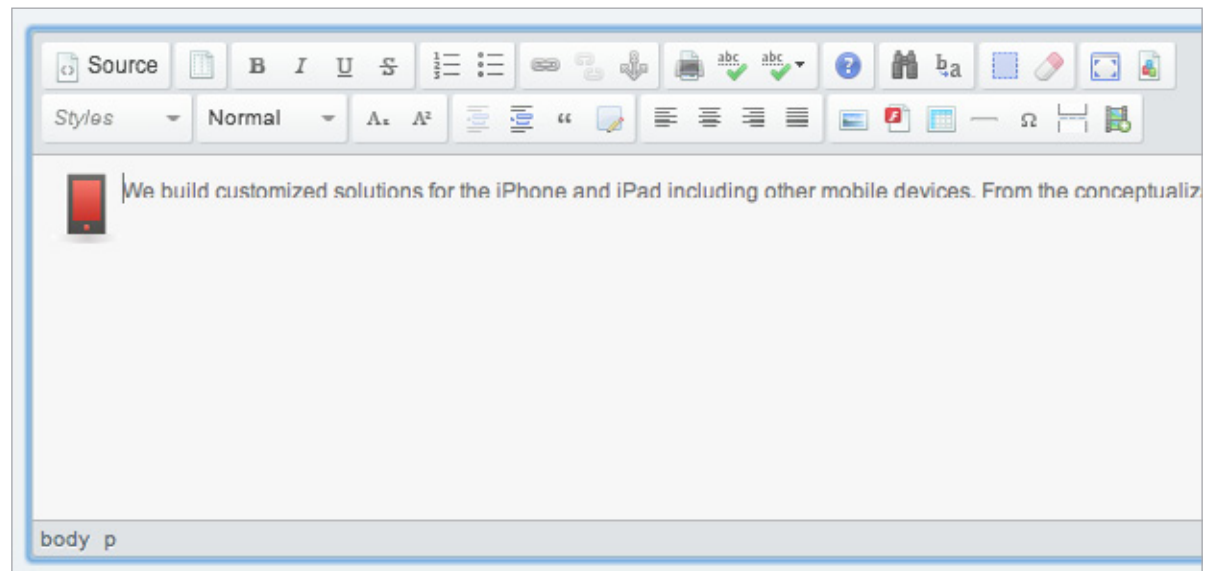
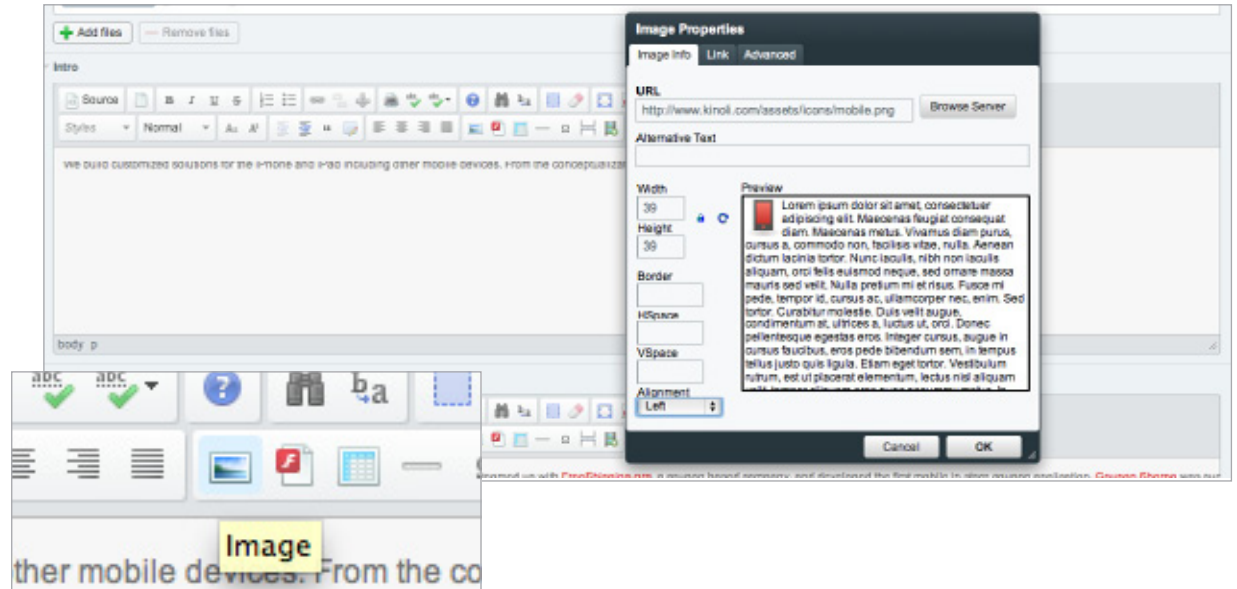


Placing images and PDF files within text fields

When you click on the image icon  within the WYSIWYG content editor, it will open up a modal window which will ask for a URL to the file. You can browse the server to see existing files (click the thumbnail to add to layout).

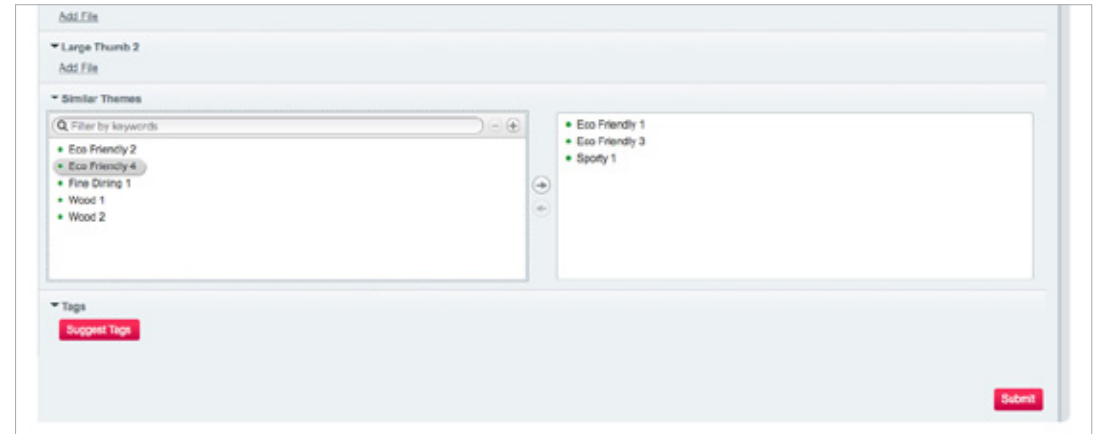
There are a few other options you can customize before you add the image to your content. You can add alternative text (descriptive text that appears if a user can't see the image), adjust alignment, and change height and width.* Under the link tab, you can link the image by typing in a URL, and optionally change the target, in case you want that link to open a new window.

* Changing the size does not alter the file, simply what the user sees. So if you upload a large image file and then change the width only here, the user will still have to load that large file when viewing it.



Multi-relationships

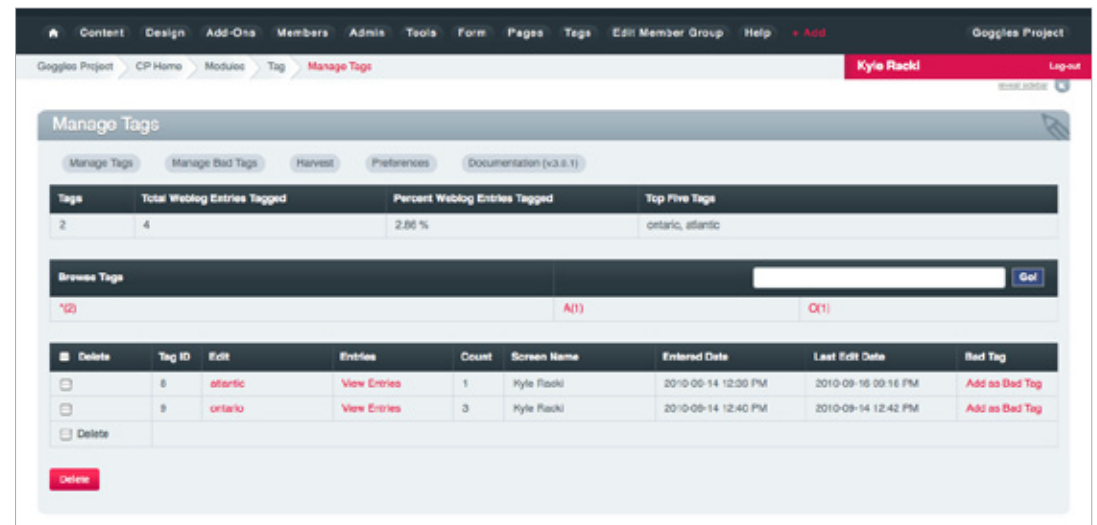
Multi-relationships are useful, for example, if you want to show a reader similar articles to the one he/she is currently reading when on your site. If your site has relationship entries, you can use a special multi-relationship custom field type when editing an entry. It will appear as two window panes, left and right. The left will show all available channel entries. If you want to relate any of those entries to the current entry you're editing, click on one or more entries in the left window (hold control key on your keyboard). Then click on the right arrow button between the two windows to move those entries over into the right.



Tags

If your site has Tags installed, you can “tag” entries by clicking on the Tags tab in the entry edit view (next to Publish, Date, Pings etc.) This tab will allow you to type in any words or phrases that you want associated with the entry. This is helpful for users who are searching for useful information on your site.

You can view stats associated with the Tags by clicking on the Tags module link (usually up in the main toolbar, near Content and Design). Here you can get a snapshot of the tags used on your site, and locate entries to edit, based on their tag. You can also add “Bad Tags” which will remove all entries reference to the tag you classified as bad.



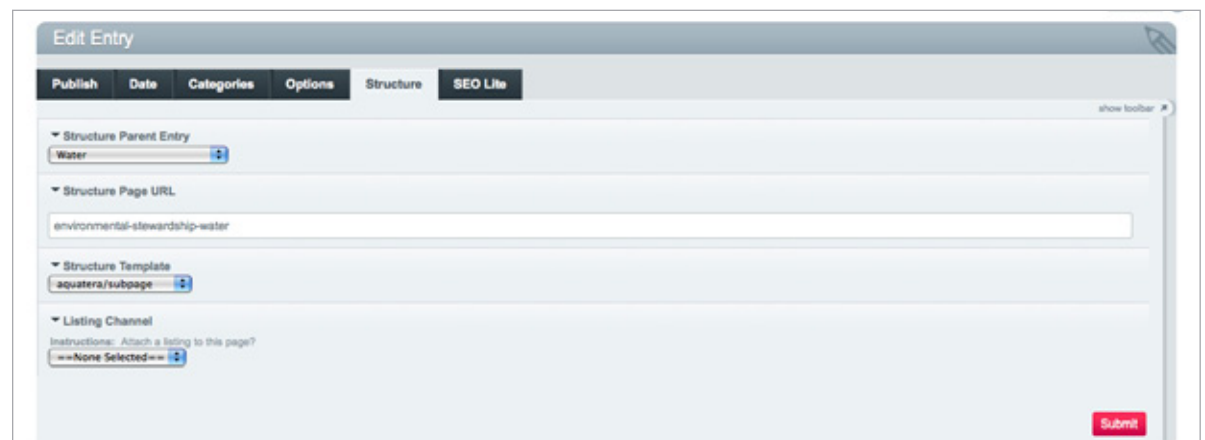
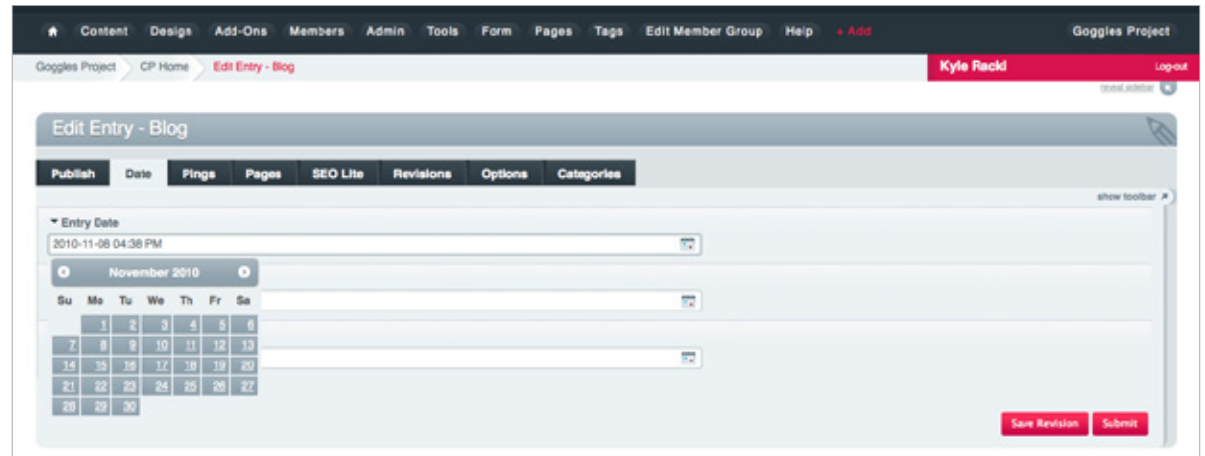
Date

All entries are associated with a date by default. When you create a new entry, its date is automatically set to the day and time you created it. You can change this date by clicking anywhere within the entry date field, which will bring up a calendar for easy picking. Changing a date may be useful if you want to make a post appear older than it is (if dates are displayed on the front-end). Optionally, you can post-date entries by selecting a date in the future. Future entries do not appear on the front-end for users until that date arrives.

You can optionally set an expiration date, if you want the entry to be unpublished from the site at a certain time in the future, and if your site has comments, you can set comments to be removed for that entry on a given date.

Structure Pages

Under the structure tab within an entry, you can manage the parent/child relationship using the drop down, change the URL of the page, select an alternate template or attach a listing to the channel. All of these options are for advanced admin users only!



Revisions

Revisions are helpful if you are editing an entry date and you want to be able to roll back to a previous saved version in the case that you make a mistake and have saved the entry. To save a revision, click on the Save Revisions button under the Revisions tab. If you find you've made a mistake and want to roll back to a previous revision, select the appropriate version and click "Load Revision".

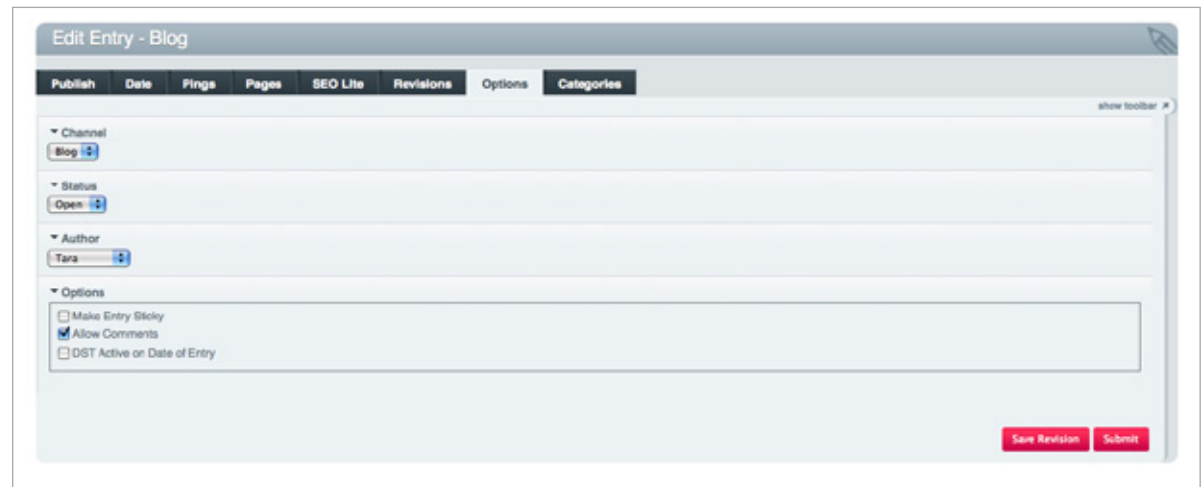
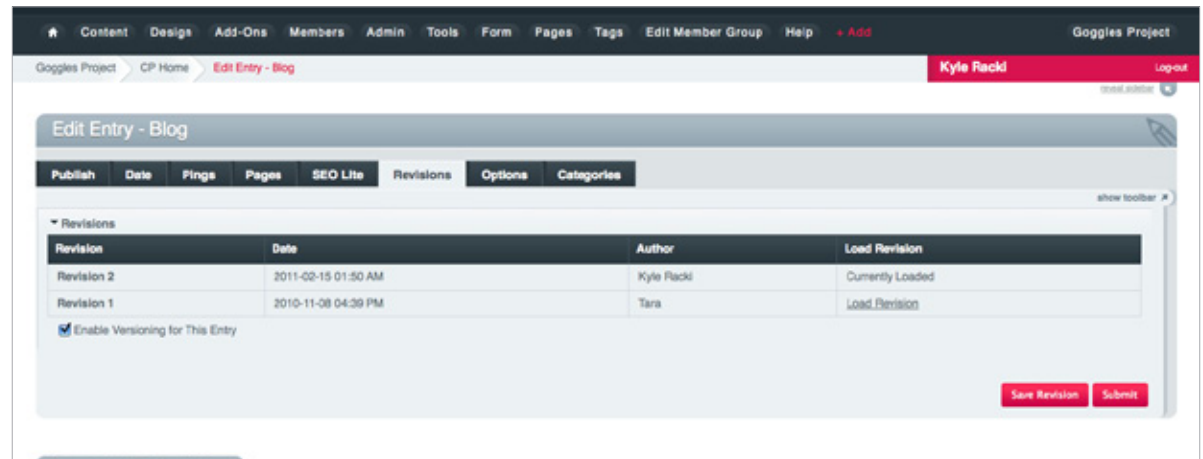
Options

The Options tab allows you to change the channel that an entry is associated with (only if they share the same field groups... for advanced use only).

STATUS However a more common need is below where you'll see the Status drop down menu. By default, every entry you create is 'open', or published to the site as soon as you save it*. If you select the entry to be closed, it means it is unpublished from the site but still editable in ExpressionEngine by you.

AUTHOR You can change the author that an entry is associated with by choosing their name from the drop down menu (member account must exist with the correct permissions).

* unless it's post-dated, see the previous page to learn about post-dating entries.



ADDITIONAL OPTIONS You can make an entry sticky by checking the appropriate box. Entries that are "Sticky" appear at the top of a list of entry articles regardless of their date. If the channel is already set to allow comments, you can optionally disable it on an entry-specific basis. You can also allow or disallow DST (Daylight Savings Time) Active on Date of Entry*

* Since dates/times will adjust themselves automatically to your local time, an issue can arise if you view or edit channel entries with dates that fall outside your current Daylight Saving Time setting. In order to compensate for this EE stores whether DST is active or not on the date that an entry is posted. You'll find this setting in the PUBLISH page under the options tab. Although it will set itself automatically when you post entries, if you find yourself editing the date of an entry, changing it so that it falls outside the dates that DST is active in your area, you may need to enable or disable this preference for that entry otherwise the time may be off by an hour.

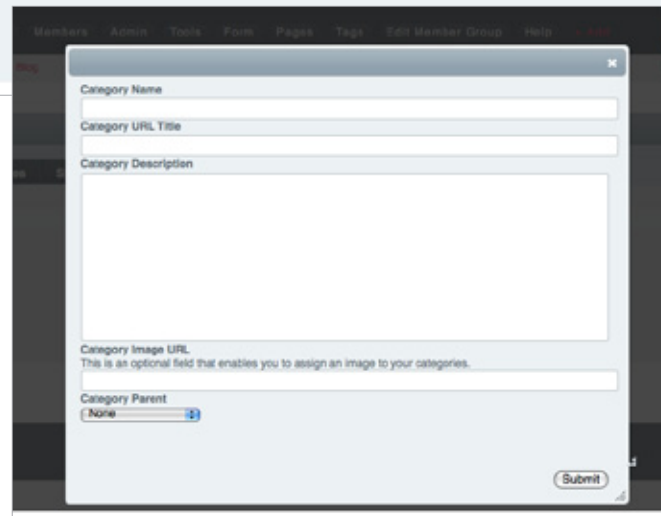
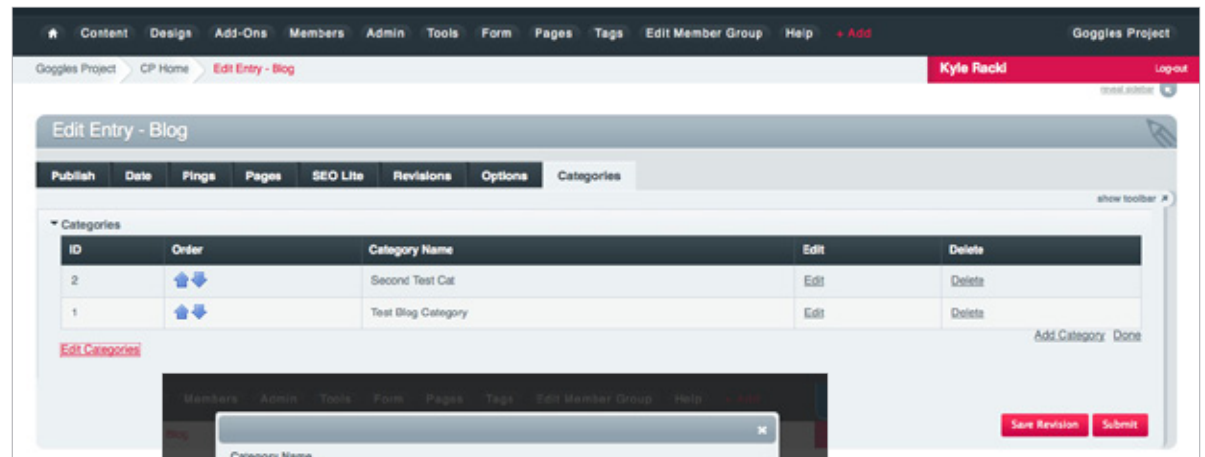
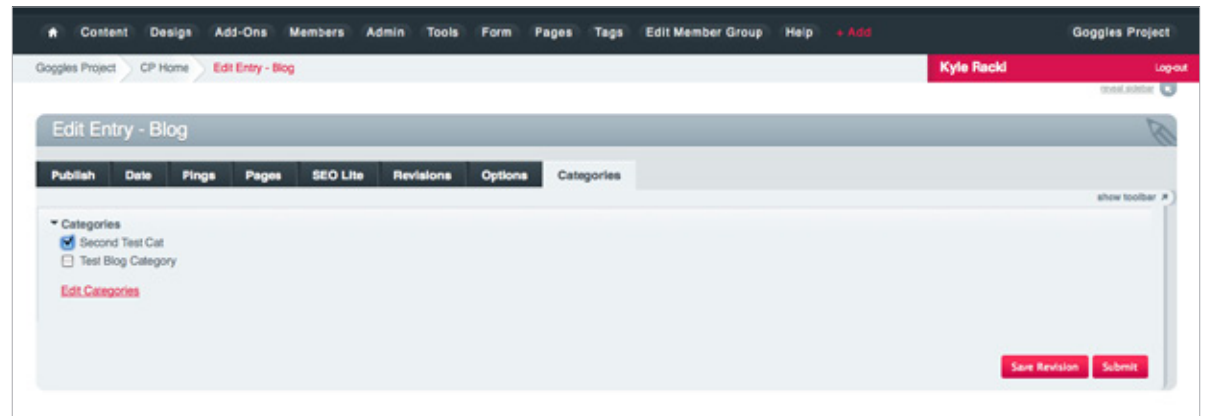
Categories

Categories are a great way to organize entries so that users on the front-end can filter to show entries that match a specific category. To assign a category to a specific entry, click on the categories tab (if this is enabled for the channel) when editing the entry. You will see a list of existing categories. To assign the entry to one or more, simply check off the appropriate boxes and save the entry.

If you'd like to edit the available list, click on the Edit Categories link. This will show an edit view of the categories and allow you to re-order them using the arrows, edit, or delete.

You can add a new category by clicking the “Add Category” link below the table and to the right. This will open a modal window and will require a category name, and any other applicable fields (all except Name are optional). You can optionally nest categories within parent groups by choosing an existing category. Click submit when you are done.

Once the modal window closes and if you are done editing the category list, click Done. Then check off the appropriate category and save your entry.

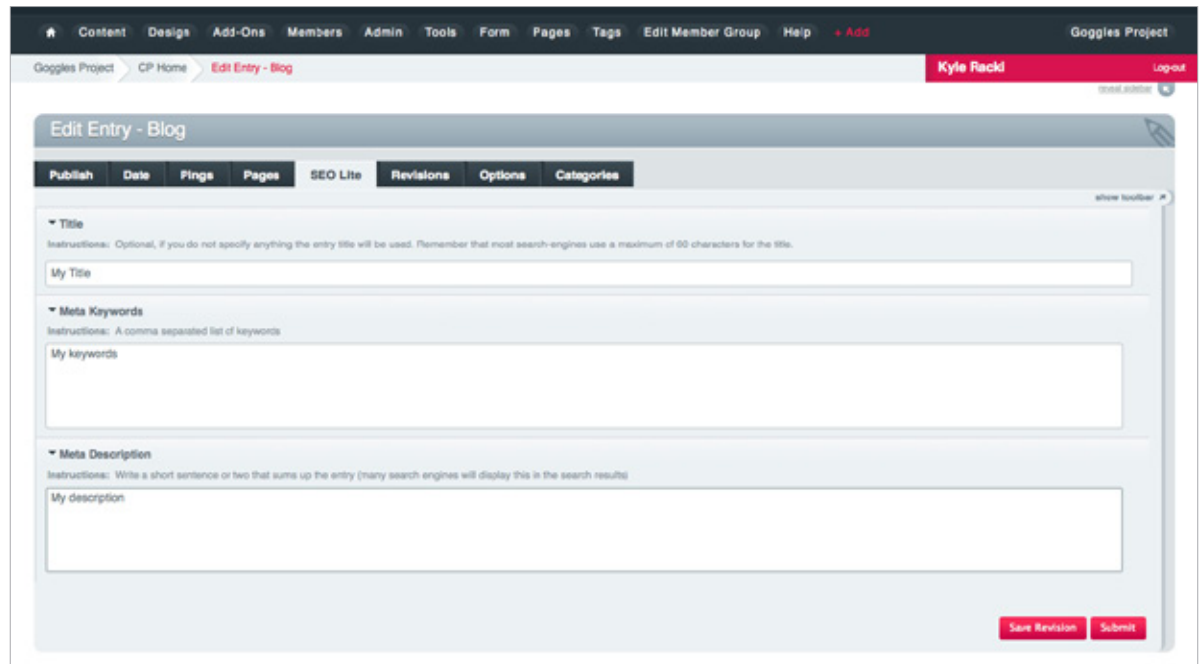


SEO Lite

SEO Lite is a module that lets you change title and meta data associated with your entry. SEO stands for Search Engine Optimization, and carefully choosing appropriate words and phrases to put within these fields can assist in getting the webpage to rank higher in search engines.

By default, most pages title tags will show the name that you've given the entry. However if you'd like to override the default setting and instead choose your own customized page title, type it under the Title field within SEO Lite. NOTE - Title tags do not appear on the webpage, they appear at the top of most browser windows and tabs.

You can also write Meta Keywords, a list of comma separated keywords and phrases, and an Meta Description - a short sentence or two that sums up the entry (many search engines will display this in the search results)



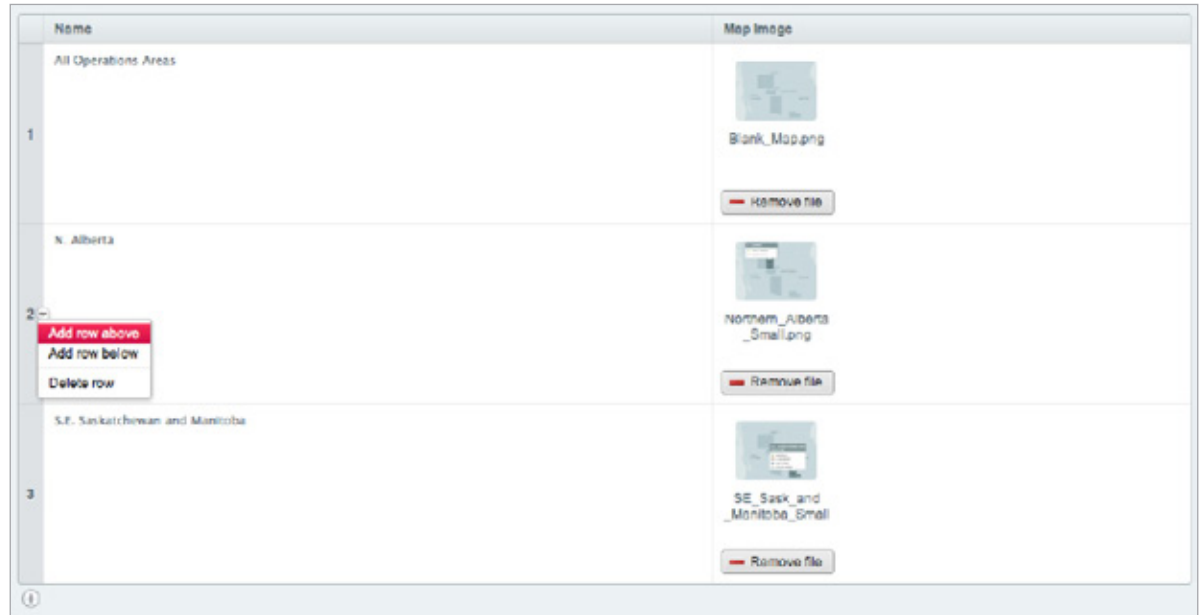
The screenshot displays the Joomla! CMS interface for editing a blog entry. The top navigation bar includes links for Content, Design, Add-Ons, Members, Admin, Tools, Form, Pages, Tags, Edit Member Group, Help, and Add. The user is logged in as 'Goggles Project' with the name 'Kyle Rackl' and a 'Logout' link. The main content area is titled 'Edit Entry - Blog' and features a tabbed interface with 'SEO Lite' selected. The 'SEO Lite' section contains three text input fields: 'Title' (with instructions: 'Optional, if you do not specify anything the entry title will be used. Remember that most search engines use a maximum of 60 characters for the title.'), 'Meta Keywords' (with instructions: 'A comma separated list of keywords'), and 'Meta Description' (with instructions: 'Write a short sentence or two that sums up the entry (many search engines will display this in the search results)'). At the bottom right of the form are 'Save Revision' and 'Submit' buttons.

Matrix Custom Field

The Matrix custom field is useful for adding lots of related data to a single entry, such as photo galleries where you want to associate a title and description with each photo. Also it is useful to list data in a grid like format similar to Microsoft Excel.

You can easily reorder rows simply by clicking and dragging the number on the left side of each row. You can also click the arrow next to each number to bring up a dialog box that allows you to add or remove new rows. Also, the plus sign below the Matrix field allows you to add a new row.

Within the matrix field you can have regular text fields, WYSIWYG fields, image fields and lots of other fields.



▼ Performance Data

	Index?	Name	2011	2010
1	NO <input type="checkbox"/> YES	Funds from Operations	404.2	318.8
2	NO <input type="checkbox"/> YES	Per Share	1.42	1.26
3	NO <input type="checkbox"/> YES	Net Income	215.3	208.6
4	NO <input type="checkbox"/> YES	Per Share	0.75	0.83
5	NO <input type="checkbox"/> YES	Operating Income	349.2	342.5
6	NO <input type="checkbox"/> YES	Per Share	0.52	0.56
7	NO <input type="checkbox"/> YES	Dividends	171.4	150.3
8	NO <input type="checkbox"/> YES	Per Share	0.60	0.60
9	NO <input type="checkbox"/> YES	Capital Expenditures	301.7	272.3
10	NO <input type="checkbox"/> YES	Net Debt Outstanding	744.6	728.8

Comments

Viewing

If your site is set up to allow comments, you can view all the comments associated with an entry by clicking on Content > Edit and then clicking on the View button within the Comments column.

Editing

Once you are viewing an entries comments, you can click on it to edit the name, email address or comment text.

Deleting

If you'd like to delete a comment, check off one or more boxes next to the comment, and select Delete Selected from the drop down box. Click "Submit" and confirm the deletion.

Banning

See page 24

Edit Channel Entries

Search Entries

Filter by Channel Filter by Category Filter by Status Date Range 50 results

Keywords

Exact Match Search titles only

#	Title	View	Comments	Author	Date	Channel	Status	
176	Staging Sustainability Conference	--	(0) View	Tara	04/20/11 05:37 pm	events	Open	<input type="checkbox"/>
177	Goggles has Arrived in Europe	--	(0) View	Tara	11/08/10 04:38 pm	blog	Open	<input type="checkbox"/>
155	EMSU Conference	--	(0) View	Tara	10/26/10 09:53 pm	events	Open	<input type="checkbox"/>
175	UofA7	--	(0) View	Micriel	10/15/10 11:46 pm	videos	Open	<input type="checkbox"/>
173	UofA5	--	(0) View	Micriel	10/15/10 11:45 pm	videos	Open	<input type="checkbox"/>
174	UofA6	--	(0) View	Micriel	10/15/10 11:45 pm	videos	Open	<input type="checkbox"/>
172	UofA4	--	(0) View	Micriel	10/15/10 11:44 pm	videos	Open	<input type="checkbox"/>
171	UofA3	--	(0) View	Micriel	10/15/10 11:43 pm	videos	Open	<input type="checkbox"/>
170	UofA2	--	(0) View	Micriel	10/15/10 11:42 pm	videos	Open	<input type="checkbox"/>
169	UofA1	--	(0) View	Micriel	10/15/10 11:41 pm	videos	Open	<input type="checkbox"/>
168	Rockin' the ASSHE Conference October 2010	--	(0) View	Tara	10/14/10 09:09 am	blog	Open	<input type="checkbox"/>

Content Design Add-Ons Members Admin Tools Form Pages Tags Edit Member Group Help + Add Goggles Project

Goggles Project > CP Home > Edit > Comments **Kyle Rackl** Logout

Comments

Comment	Author	Email	Date	IP:	Status	
Nice sharing, and great...	brian atwood	caoyiqian03f11@gmail.com	2010-10-03 11:51 PM	60.20.205.144	Open	<input type="checkbox"/>

Showing 1 to 1 of 1 entries (filtered from 4 total comments)



Multi-lingual sites

Phrases

If you have a multi-lingual website, you can edit from a list of phrases by going to Addons > Module > Multi-language.

To edit the Phrase text, click on the appropriate phrase index (ie: a short name with no spaces). The edit screen will have an English phrase and then a corresponding phrase in another language. Enter the translation here.

Custom Fields

To translate other copy blocks, edit an entry, and notice additional content fields that are appropriately named (ie: French Content, French Title). Enter the translation here.

Multi Language (Total Phrases: 75)			
An update for this module is now available here			
Phrase Index	English (remove)	French (remove)	+ Add Language
about	About PEI Flavours	À notre sujet	Delete
address	Address	Adresse	Delete
advancedsearch	Advanced Search	Recherche avancée	Delete
all	All	Toutes	Delete
allproducts	All Products	Tous les produits	Delete
apr	Apr	avril	Delete
aug	Aug	août	Delete
becomefacebookfriend	Become a Facebook Friend		Delete
behindfood	Behind the Food	Derrière les aliments	Delete
booking	See...	Réservations	Delete
category	Category	catégories	Delete
channeltube	Videos/Tips	Videos/Conseils	Delete
clickproducts	Click on any of the products below to see who offers...	Cliquez sur le produit de votre choix ci-dessous pour...	Delete
contact	Contact	Contactez-nous	Delete

File Manager

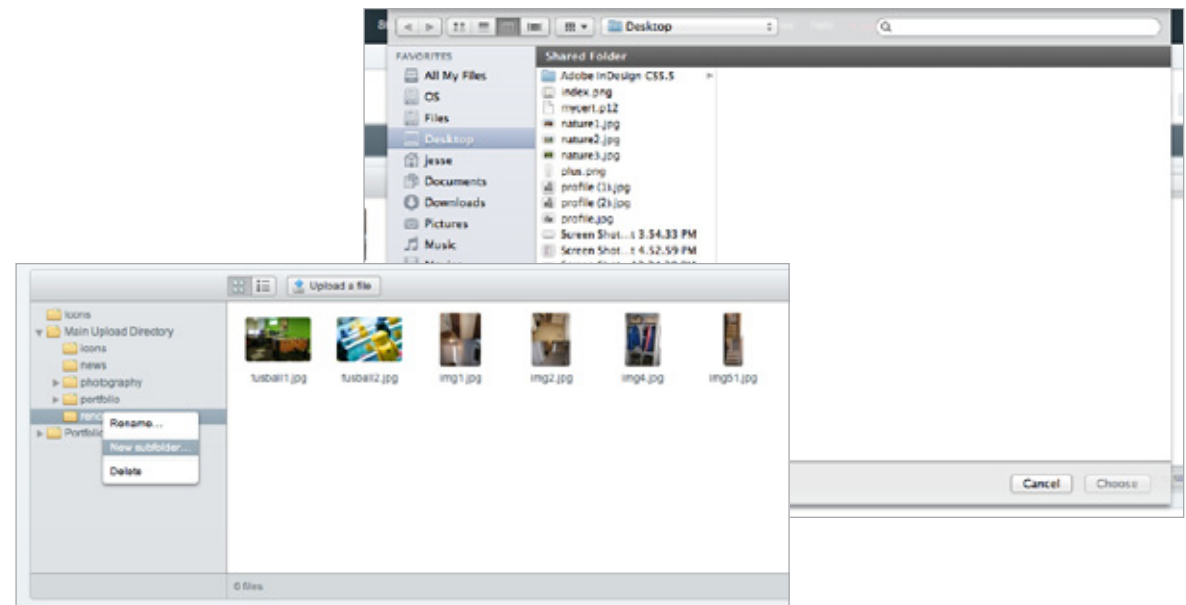
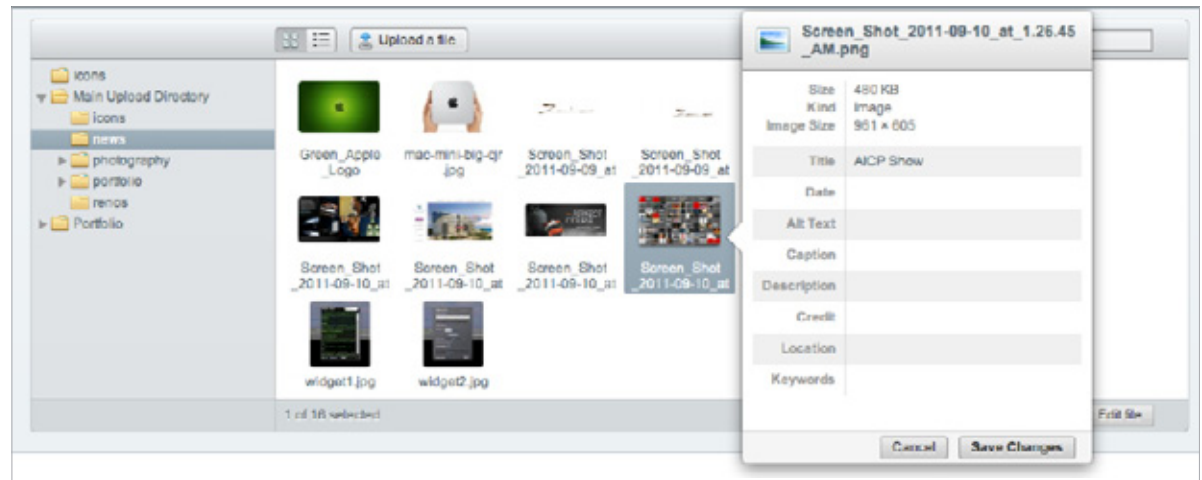
Assets

To manage images and other files on your webserver, you can view the Assets module. This module allows you to organize files, upload files and even edit file settings.

If you right click on an image it will show you all the options available to delete, edit or view the associated image file.

In the left hand column you can add new sub directories simply by right clicking and select “add subdirectory”.

Once the files are added to your file manager, you will then be able to add those files to any pages on your website that allow you to add assets.



Form Entries

Entries

To view what users have posted to contact or survey forms on your site (if this has been set up) go to Addons > Modules > Freeform.

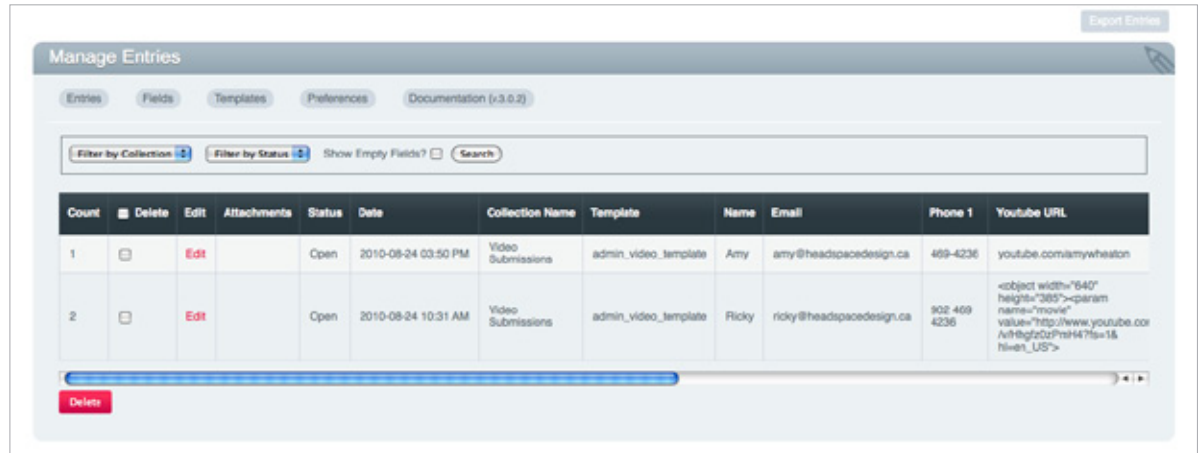
You will see a large table of entries posted to forms on the website, with a variety of default and custom fields, such as form name, user name, email address, messages, date of post etc.

You can export the entries to a file by clicking on Export Entries top right.

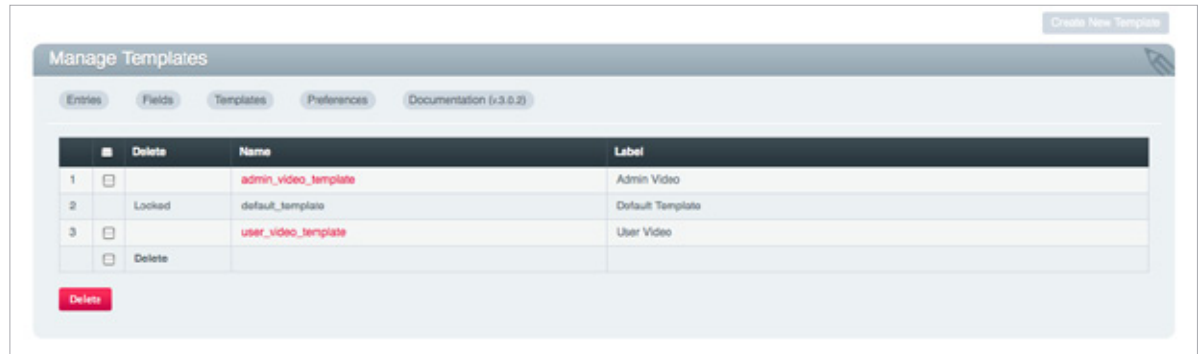
You can edit and delete entries if desired.

Email Templates

If desired, you can change templates within Freeform. Templates are used as boilerplate emails that get automatically sent to site admins and/or users when a form is submitted via the front-end. If you'd like to change the message in these emails, click on a template and edit the copy.



Count	Delete	Edit	Attachments	Status	Date	Collection Name	Template	Name	Email	Phone 1	Youtube URL
1		Edit		Open	2010-08-24 03:50 PM	Video Submissions	admin_video_template	Amy	amy@headspacedesign.ca	469-4236	youtube.com/amywheaton
2		Edit		Open	2010-08-24 10:31 AM	Video Submissions	admin_video_template	Ricky	ricky@headspacedesign.ca	902 469 4236	<object width="640" height="385"><param name="movie" value="http://www.youtube.com/v/fhg2coFmH4?fs=1&hl=en_US">



Delete	Name	Label
	admin_video_template	Admin Video
Locked	default_template	Default Template
	user_video_template	User Video

Editing your account

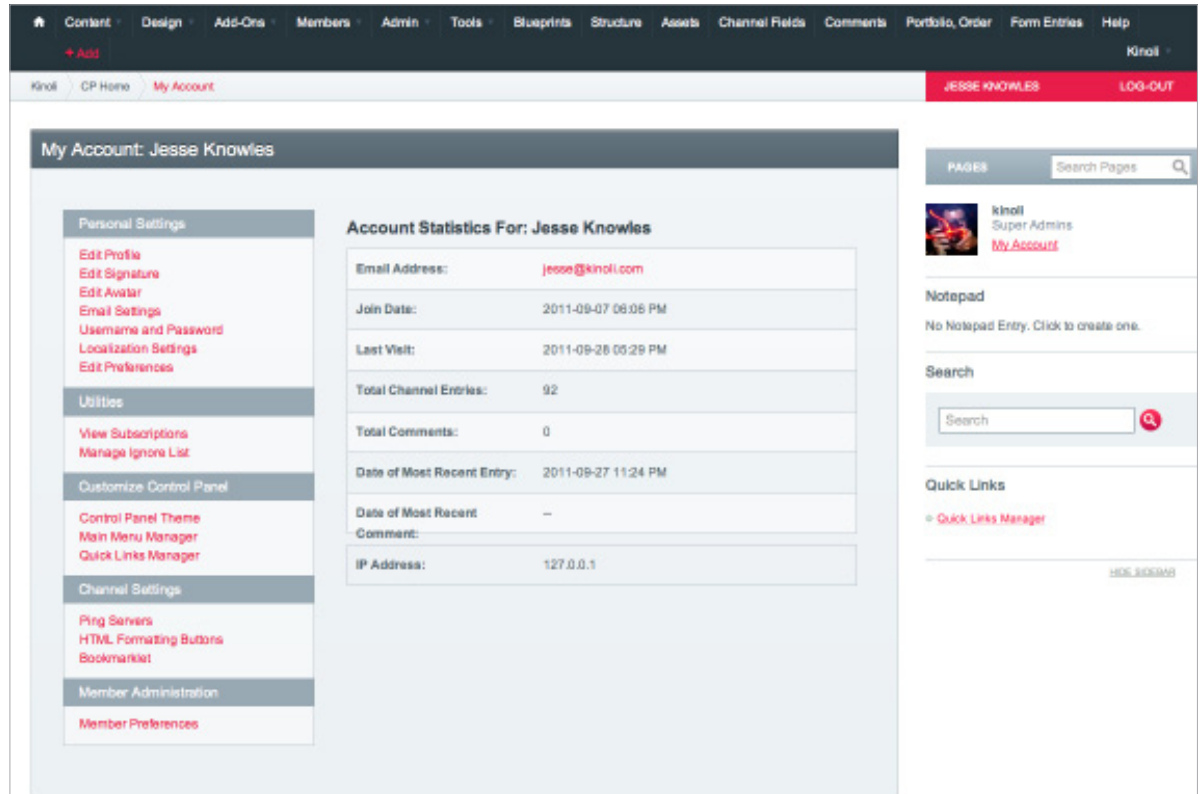
Changing account details

You can change your own account details at any time while logged into ExpressionEngine, by clicking on “Control Panel” located underneath your name in the sidebar. (If you have this sidebar collapsed, click on “Reveal Sidebar” underneath your name)

This will take you to your account page, where you can use the left sidebar to click on various account detail pages. To change your profile details, click Edit Profile. To change your account username and/or password, click on Username and Password. This guide will not exhaustively list all of the settings you can change under your account.

Customizing your control panel

If you want to set up a page within EE as a shortcut in the main tool bar, click the “+ Add” button at the top while on the appropriate page. You can manage all of these shortcuts in your account under Customize Control Panel > Main Menu Manager. To removed a shortcut from the top, leave the field blank and click Update.



The screenshot shows the 'My Account' page for Jesse Knowles. The page is divided into several sections:

- Personal Settings:** Edit Profile, Edit Signature, Edit Avatar, Email Settings, Username and Password, Localization Settings, Edit Preferences.
- Utilities:** View Subscriptions, Manage Ignore List.
- Customize Control Panel:** Control Panel Theme, Main Menu Manager, Quick Links Manager.
- Channel Settings:** Ping Servers, HTML Formatting Buttons, Bookmarklet.
- Member Administration:** Member Preferences.

Account Statistics For: Jesse Knowles

Email Address:	jesse@kinoli.com
Join Date:	2011-09-07 06:06 PM
Last Visit:	2011-09-26 05:29 PM
Total Channel Entries:	92
Total Comments:	0
Date of Most Recent Entry:	2011-09-27 11:24 PM
Date of Most Recent Comment:	—
IP Address:	127.0.0.1

The right sidebar contains a search box, a user profile for 'kinoli Super Admins', a Notepad section, another search box, and Quick Links including 'Quick Links Manager'. The top navigation bar includes links for Contact, Design, Add-Ons, Members, Admin, Tools, Blueprints, Structure, Assets, Channel Fields, Comments, Portfolio, Order, Form Entries, and Help.

User and Member Access

Viewing and Editing Members

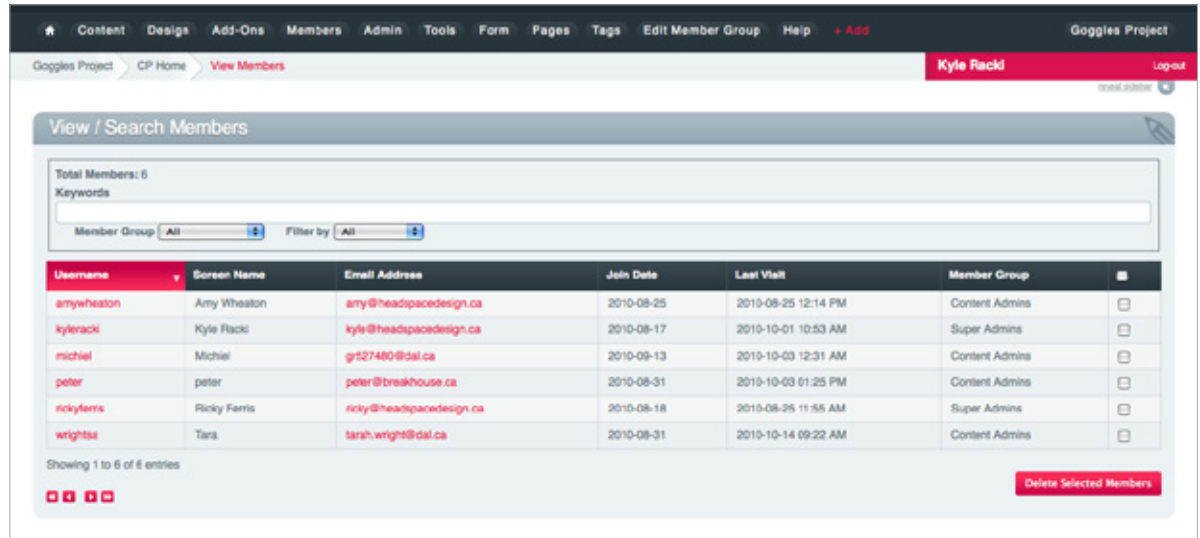
You may have a variety of member types on your site. A member is a user who can log into the website, either through the front-end or directly into ExpressionEngine. Member groups are what EE uses to organize types of members. By default, there are always Super Admins (users with unlimited and complete access to the back-end, useful for web developers), Banned, Guests (non-logged in users), Pending and Members. Optionally, new Member Groups can be created and customized to have unique privileges. This guide does not exhaustively list all of the many settings you can configure for member groups.

Registering new members

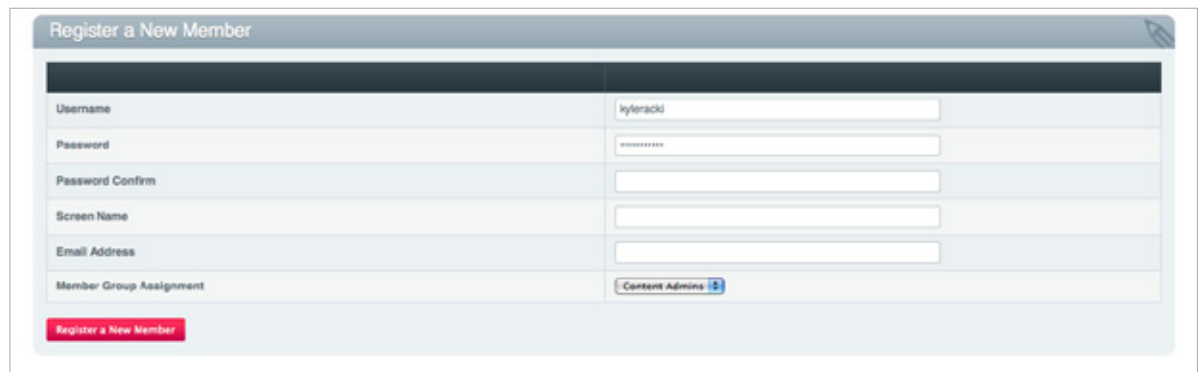
To give a user their own account, go to Members > Register Member. Fill out the form, including username, password, Screen Name, Email Address, and assign the new user to a group.

Activating Pending members

If a member who is pending needs to be activated go to Members > Active Pending. Check off the name and click Activate.



Username	Screen Name	Email Address	Join Date	Last Visit	Member Group
amywheaton	Amy Wheaton	amy@headspacedesign.ca	2010-08-25	2010-08-25 12:14 PM	Content Admins
kylerracki	Kyle Racki	kyle@headspacedesign.ca	2010-08-17	2010-10-01 10:53 AM	Super Admins
mschiel	Michiel	gr527480@dal.ca	2010-09-13	2010-10-03 12:31 AM	Content Admins
peter	peter	peter@breakhouse.ca	2010-08-31	2010-10-03 01:25 PM	Content Admins
rickyferris	Ricky Ferris	ricky@headspacedesign.ca	2010-08-18	2010-08-26 11:55 AM	Super Admins
wrightsa	Tara	tarah.wright@dal.ca	2010-08-31	2010-10-14 09:22 AM	Content Admins



Register a New Member

Username: kylerracki

Password: [REDACTED]

Password Confirm: [REDACTED]

Screen Name: [REDACTED]

Email Address: [REDACTED]

Member Group Assignment: Content Admins

Register a New Member

Editing Profiles, changing group

You can edit the profiles of other members in EE by going to Members > View All, and clicking on the username of the appropriate member. From there you can use edit their account using the left sidebar (See page 22)

Banning members

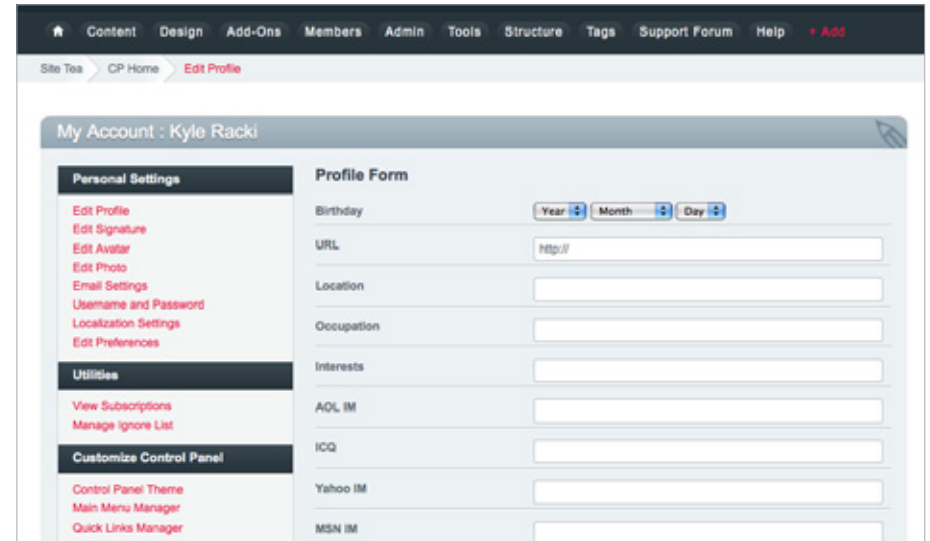
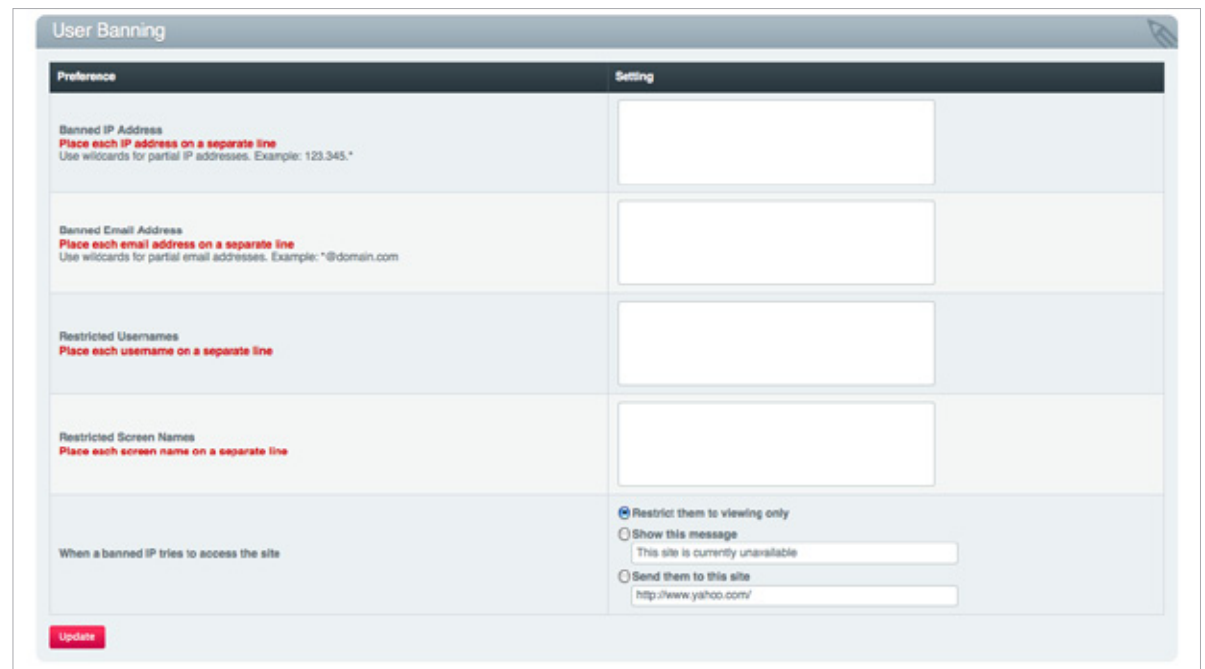
You can ban malicious users by going to Members > User Banning. Here you can prevent users from accessing your site. For example, if a user has posted spam to your blog, you could ban that user from even viewing your site by copying their IP from the comment section, and pasting it within the Banned IP Address text box under “User Banning”. You can also ban by email address.

You can edit what happens when a banned user tries to access the site. They can either

a) Still view the site but not be able to post comments or interact with the site in any other way.

b) View a message that you can edit, such as “Unavailable”.

c) Get redirected to another website, such as Google or Yahoo.



Backup and Upgrades

Backing up your site

You'll want to back-up your website on a regular basis. It would be quite a shame to lose all the data you've entered!

Since all of the data on your site is stored in a database, you'll need to log into your hosting control panel, and download a copy of your database. Alternatively, you could ask your hosting provider if they make regular database back-ups, which all reputable hosts should. If your database ever gets corrupt or damaged, you can restore your site from an earlier copy of the database.

Updating to the latest version

ExpressionEngine is continually being updated and improved, whether it's a bug fix, security patch, or new feature. Your ExpressionEngine license always comes with a year of free updates, and after that expires, a new year of upgrades is only \$39.95US. It's a good idea to update your version of ExpressionEngine to the latest as often as possible. This will ensure it is stable and secure. NOTE The cost of the upgrades does not include labour time for hiring us or another developer to download and upgrade to the latest version.

Development and design changes

You will probably want to make some major improvements on your site over time, beyond content changes.

Your copy of ExpressionEngine is yours to keep forever, and you are not bound to Kinoli for website upgrades (though we would love to have your business :)

If you desire to get a new feature developed, or change the design in some way (even from the ground up), you can do so without having to re-install ExpressionEngine again, and add all your content again. Just be sure the developer you choose has Super Admin account access, and he/she will be able to do anything you'd like with the site! Your Super Admin account is:

Username: `super_admin`

Password: `pa$$word`

When logged in with this account, you'll have complete access to everything, including Templates, Modules, Extensions, Plugins and more. Be careful, with great power comes great responsibility!



Under the hood

ExpressionEngine is made up of two main parts. a) The files that sit on your server (Mostly PHP Files, your File Upload Directory, and some HTML, CSS and Javascript) and b) all of the data that goes into your MySQL database through your hosting account. Within your control panel, you can administer add-ons, and edit how the dynamic data gets pulled into your website.

Templates

This is where all the cool functionality gets customized by your designer and developer. Within the templates are EE tags, dynamic tags that output PHP which talks to your database and returns results. You can even enter custom PHP and database queries through the templates.

Modules, Extensions, Plugins

Want your site to be flexible enough to grow? All the great first and third party add-ons get activated through these sections. EE has virtually limitless functionality!

Other developers

Looking for an EE developer? Go to:
expressionengine.com/professionals/