



Creating & Maintaining Your Library Website

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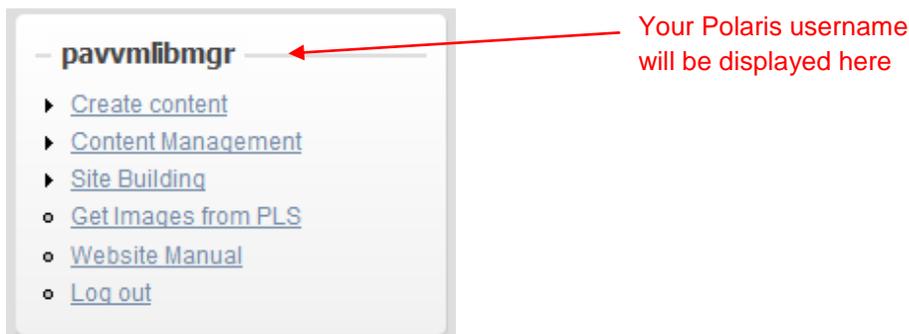
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1. Log In

Go to the **/user** page on your website. For example, on the Valleyview site, this is www.valleyviewlibrary.ab.ca/user. Enter your username and password and click on the *Log in* button.

Your username is the same one you use for Polaris, unless otherwise indicated. The first time you log in, your password will be *temp123*. **We recommend you change your password after your initial log in - please see section 2.** If you are having difficulty logging in, contact the Helpdesk at helpdesk@peacelibrarysystem.ab.ca.

Once you have logged in, your **user account menu** will appear in the left sidebar. It looks like this:

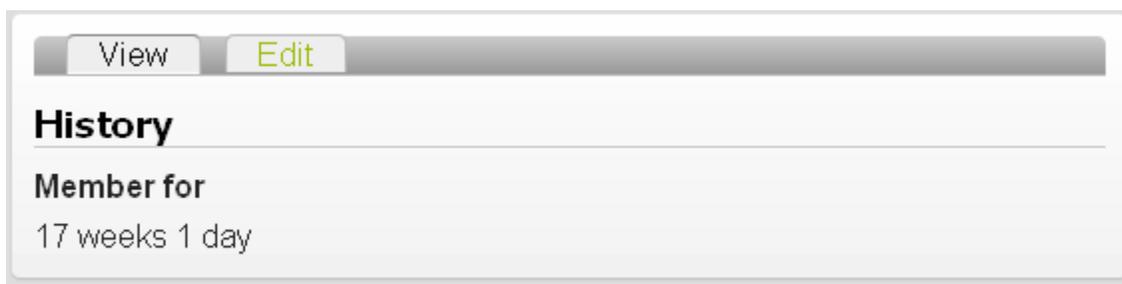


A black dropdown menu will also appear at the top of your website. It has the same menu options as your user account menu, and you can use whichever menu you prefer.

2. Change Your Password

Please do **not** use the *Request new password* feature, as this functionality is disabled.

After logging in, you will see a screen like this:



To change your password, click on the *Edit* tab, and under *Password*, **type in** your new password. Type your new password again under *Confirm password*, and click on the *Save* button.

We recommend that you use your Polaris password to go along with your Polaris username login for the websites to minimize the amount of passwords you need to remember.

3. Layout, Colours, Logo, Favicon

3.1 Change Website Layout

There are two layouts you may choose for your website:

Biblio (Theme 01): A three column layout, with a horizontal menu bar along the top of the page

Libris (Theme 02): A two column layout, with a vertical menu along the left side of the page

To change your website layout, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Settings* (under *Site Building/Site Colours & Layout*). **You'll note that the PLS logo appears at the top of the page, please just ignore that.** Click on the *Default* button next to the layout you want (so that the circle has a dot in it). Then click on *Set Domain Theme*.

The Meridia theme is for the Peace Library System website only.

Go to your website's homepage to see the change - you may have to click on the *Refresh* button in your browser.

Note: Changing your website layout will ***not*** delete any existing content. However, it may change some colours and the appearance of some content (for example, switching from the three column layout to the two column layout will move any side content that was previously in the right sidebar over to the left sidebar.)

3.2 Change Website Colours

To change the colours of your website, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Configure*.

In the *Colour Set* dropdown list, you may choose from a list of colour templates, **or** you may create your own combination of colours by selecting *Custom* from the dropdown list.

If you select *Custom*, you can enter a colour by clicking on the coloured box under *Base color*, *Link color*, *Header top*, *Header bottom*, or *Text color*, and then clicking on a colour in the colour map on the right. Alternatively, you can type in the number of a colour manually, as long as you make sure you enter the # sign before the number. (If you Google “hexadecimal colours,” you can find various graphs and charts online showing the colours that correspond to various colour numbers.)

The website colours work slightly differently depending on which layout you have selected (be sure to choose your layout first before choosing your colours). Here’s how the colours work:

If you are using Biblio (Theme 01) (the layout with three columns and a horizontal navigation menu at the top):

- *Base color* – Ignore this.
- *Link color* – Refers to the colour of any linked text on your website.
- *Header top* – Refers to the colour of the top of your header bar. If you choose different colours for header top and header bottom, the header bar will be displayed as a gradient, gradually shading between the two colours.
- *Header bottom* – Refers to the colour of the bottom of your header bar
- *Text color* – Refers to the default colour of the text of the pages you create. (You can customize the colour of any given text, though.)

If you are using Libris (Theme 02) (the layout with two columns and a vertical navigation menu on the left):

- *Base color* – Ignore this.
- *Link color* – Refers to the colour of any linked text on your website.
- *Header top* – Refers to the background colour of the top of your page. If you choose different colours for header top and header bottom, the background colour will be displayed as a gradient, shading between the two colours.
- *Header bottom* – Refers to the background colour of the bottom of your page.

- *Text color* - Refers to the default colour of the text of the pages you create. (You can customize the colour of any given text, though.)

Once you have chosen your colours, go to the bottom of the page and click on *Save Configuration*. You may have to click on *Refresh* in your browser to see the colour change take effect.

3.3 Logo

Add Your Library's Logo

You may **replace** the name of your library text at the top left of your website with a small logo. **Note that the maximum size of this logo is 250 pixels in width and 110 pixels in height.** You may need to resize your logo to bring it under the maximum picture dimensions.

If you would prefer to upload a larger logo, you may add it as an image in a side content box. See *Section 8.1*.

In order to add a logo to the top left of your website, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Configure*. Towards the bottom of this page, there is a section called *Logo image settings*. In this section, click on *Browse* (under *Upload logo image*), and find the logo image file on your computer. **Double click** on the logo image file. Go to the bottom of the page and click on the green *Save configuration* button.

Delete Your Logo

To remove your logo from your site so that the name of your library is once again displayed at the top left of your website, first click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Configure*. Go down to the section called *Logo image settings*. Under *Path to custom logo*, **delete** the filename path that is displayed. Then go to the bottom of the page and click on the green *Save configuration* button.

3.4 Favicon

A favicon is a small icon that appears to the left of the website address in your browser. For example, if you go to www.amazon.ca, you will see a favicon like this: 

By default, the favicon for your library is set to the default Drupal favicon: 

You can create your own custom favicon for your library website if you wish. Favicon images **must** be 16 pixels by 16 pixels in size, and must be saved in .ico format.

An easy way to create a favicon is to use a free favicon generator – two of these are: www.favicon.cc and www.degraeve.com/favicon

Add a Custom Favicon

Click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Configure*. Go down to the very last section on the page, *Shortcut Icon Settings*. Next to *Upload icon image*, click on the *Browse* button. Find your favicon on your computer, and click *Open*. Then click on the green *Save configuration* button at the bottom of the page.

Remove a Custom Favicon

To go back to the default favicon, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Domain Theme Configure*. Go down to the very last section on the page, *Shortcut Icon Settings*. Put a checkmark next to *Use the default shortcut icon*, and click on the green *Save configuration* button at the bottom of the page.

4. Menus

*Note: All instructions in this section apply to the Main Menu **and** the Footer Menu.*

4.1 Edit Menus

To edit the menus on your website, click on *Site building* in your user account menu. On the next screen, you will see three links to edit your *Main Menu*, *Footer Menu*, or *Top Menu*. These are the menus that are visible to your patrons.

If your website has three columns, the *Main Menu* is the horizontal menu near the top of your website. If your website has two columns, the *Main Menu* is the left sidebar menu.

The *Footer Menu* refers to the links present in your footer. By default, *Home* is the only link in your footer, but you can add more links if you wish. Examples of links that could go in your footer are *Privacy Policy*, *Terms of Use*, or *About the Library*.

The *Top Menu* refers to the links present above your header.

Click on the *Main Menu*, the *Footer Menu*, or the *Top Menu* (whichever you want to edit), and then go to the appropriate instructions in this section, depending on what you want to do (create a new menu link, delete or rename a menu link, or change the order of your menu links).

Create a Menu Link to an External Site

Normally, to create a menu link to a page on your **own** website, you simply edit that page and create the menu link under *Menu Settings*. (See *Section 5.1*.)

If you want to link to an **outside** page:

- Click on the *Add item* tab at the top of the page.
- Under *Path*, enter the **complete address** of the webpage you want to link to. For example, to link to Google, you would enter: <http://www.google.com>
- Under *Menu link title*, enter the name you want to appear in your menu.
- **Ignore** the *Description* field. If you enter text here, it will pop up when someone hovers a mouse over the link in the menu (which you usually do not want to happen).
- *Enabled* should already have a checkmark next to it. **Add a checkmark** next to *Expanded*. (This is necessary in case you later add submenu links under this menu link. If you don't have a checkmark next to *Expanded*, the submenu links will not show up when you hover over this menu link.)
- Choose a *Parent item* out of the dropdown menu – the link will appear in the navigation menu **under** its *Parent item*. If you select *Main Menu*, the link will appear as a top-level menu link.
- You can **ignore** the *Weight setting* and the *Restrict Menu Item Visibility* setting.
- Click *Save*.

Rename Menu Items

Click on *Edit* to the right of the menu item you wish to rename, enter the new name under *Menu link title*, and click on the green *Save* button at the bottom of the page.

Delete Menu Items

Click on *Delete* to the right of the menu item you wish to delete, and then click on the green *Confirm* button.

Note: Deleting a menu item will **not** delete any page to which the menu item is linking. You will need to delete the page separately (assuming you want to delete it).

Disable Menu Items

You can disable a menu item instead of deleting it, if you think you will want to use it again later. Note that disabling a menu item will only make the link in the menu disappear. It will **not** make the actual page it links to unavailable – in order to prevent people from being able to load the page a menu item links to, you will need to unpublish the page as well.

To disable a menu item, **uncheck** the *Enabled* checkbox to the right of the menu item you wish to disable. Then click on the green *Save Configuration* button at the bottom of the page.

Change the Order of Menu Items

To change the order of menu items, drag the arrowed cross next to a menu item up and down in the list. The arrowed cross looks like this: 

(You can get to the list of your menu items by clicking on *Site building* in your user account menu, then the *Main Menu*, *Footer Menu*, or *Top Menu*.)

5. Pages

5.1 Create a Page

To add a new page to your website, go to your user account menu in the left sidebar (after you log in), and click on *Create Content*. On the next page, click on the *Static Page* link. (Or you can click on *Static Page* under *Create Content* in the top menu bar – it will take you to the same place.)

On the next screen, first **type in the title** for the page you're creating. Then click on *Menu Settings*, and add a *Menu Link Title*. This is the link that will appear in your navigation menu for the page you are creating.

***For example:** If you are creating an Adult Programs page that you want to appear under Programs in the menu, first create the Programs page and set its Parent Item to Main Menu. Then create the Adult Programs page and set its Parent Item to Programs.*

Below *Menu Link Title*, click on the *Parent Item* dropdown menu. If you leave the *Parent Item* set to *Main Menu*, then the link to your page will appear in the main menu of your website. If you want the link to appear under an existing menu item, select that menu item in the list.

The *Weight* dropdown menu is used to **set the location** of the menu link in the menu. If you have a vertical navigation menu on the left of your site, then choosing a high number for the weight of a particular page will make the link to that page sink towards the bottom of the menu. Choosing a lower number (or a negative number) will make that page float towards the top. If you have a horizontal menu bar at the top of your site, then heavier menu items will sink towards the right, and lighter menu items will float towards the left.

Ignore the *Restrict Menu Item Visibility* option.

Under *Body*, you can type in your desired text. If you don't see icons for formatting your text at the top of this box, click on *Enable rich-text* below the box. This will provide buttons for font formatting, adding links, and so on. Note that when you enter multiple paragraphs or lines, some space will automatically be inserted to separate them. If you want your paragraphs or lines to be right next to each other, hold down the *Shift* key when you hit the *Enter* button on your keyboard.

Under *Input Format*, the *Full HTML* option should be selected. (*This is selected by default when you create a page. However, if you encounter any problems with formatting not showing up properly on a published page, check to ensure this option is selected. If you are trying to enter code from another website, such as code from Facebook to create a "Like" button, you should select Unfiltered HTML as the Input Format.*)

You may ignore the *Revision Information* section. As long as there is a checkmark next to *Create new revision* (which there is by default), each version of the page you create will be saved, and you will be able to revert back to older versions if you wish. See *Section 5.2* for details.

If you wish to add any attachments to this page (for example, a pdf), you may do so under *File Attachments*. See *Section 7.3* for details.

Click on *Comment Settings* and select *Read/Write* if you wish to allow users to add comments to your page (comments are disabled by default).

You may ignore the *Authoring Information* section. This is provided in case you want to specify who created the page (e.g. Jane.)

You may ignore *Publishing Options* if you wish. The options here are:

- *Published* – uncheck this box if you want to save the page but you don't want to publish it yet (if it is published, the public will be able to view the page; otherwise, they won't see it.)
- *Promoted to front page* – check this box if you want your new page to show up as a box on your website's front page (in the main content area). If you do this with more than one page, they will be sorted on your front page in reverse order of creation (most recently created at the top).
- *Sticky at top of lists* – check this box if you want to specify that the link to this page should always come first in the menu (above or to the left of any other links).

At the bottom of the page, click on *Save*. You have now added a new page to your website.

5.2 Edit or Delete a Page

To edit or delete a page you have already published, click *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*. You will be taken to a list of every page you have created so far.

Edit

On the *Manage Content* screen, click on the *Edit* link in the far right column beside the page you wish to edit. This will take you to a screen with the same options as for creating a page (see *Section 5.1* for instructions on each option.)

To revert back to an earlier saved version of a page: You must have saved the earlier version in advance. Every time you edit a page, your changes are saved as a new version **UNLESS** you click on **Revision Information** and **uncheck** the checkbox next to **Create new revision**. So usually older versions of your page will have been automatically saved.

When editing a page, you may if you wish add a note describing the changes you are making to the page, as the **Log message** under **Revision Information**.

To change the page back to an older version, **log in** to your website and go to the page. You will see a **Revisions** tab at the top of the page if any earlier versions have been saved. Click on this, and then click on **Revert** next to whatever version you want to revert back to.

Note that older versions of pages are automatically deleted after two months.

Delete

On the *Manage Content* screen, put a **checkmark** in the box to the left of the page you wish to delete, and click on the **Update Options** drop-down menu above the list of pages. Choose **Delete** from the list of options, and click on the blue **Update** button. You will be asked if you are sure you want to delete the page. Click on **Delete All** (this will only delete the page(s) you have selected, not your entire website).

5.3 Update Options dropdown menu

On the *Manage Content* screen, the *Update Options* dropdown menu includes *Publish*, *Unpublish*, *Promote to front page*, *Demote from front page*, *Make Sticky*, *Remove Stickiness*, *Delete*, and *Update URL Alias*. **To use any of these options, select it** out of the dropdown menu, and **check the box** next to the page(s) you want to be affected. Then click on the blue **Update** button.

The *Publish* and *Unpublish* options allow you to change the accessibility of a page on your website. If a page is unpublished, the public will not be able to view it. This is useful if you have a “draft” page that is still a work in progress, or if you want to take a page down temporarily but save it for the future (for example, you might want to unpublish a Summer Reading Club page at the end of the summer, but keep it saved on your website until next year.)

The *Promote to front page* option will display the page you have selected on the front page of your website (in its own box). Conversely, the *Demote from front page* option will undo this.

The *Make Sticky* option means that your page will appear at the top of any menu, and the *Remove Stickiness* option will undo this.

Delete will delete a page forever (after asking if you are sure you want to delete the page).

Ignore the *Update URL Alias* option.

6. Side Content

6.1 Create Side Content

“Side content” refers to the sidebar boxes on your website. Depending on the layout you have chosen (three columns or two columns), you may add both left and right side content, or you may add *only* left side content.

Side content may contain text, images, or both.

To create new side content, click on *Create Content* in your user account menu (in the left sidebar after you log in), then click on *Side Content* (towards the bottom of the page).

Enter a title for your side content box. Under *Display Title*, choose “yes” if you wish this title to be visible when people view your website, or “no” if you wish the title to be invisible. Under *Block Location*, choose “left” or “right” depending on whether you want the side content box to be in the left sidebar or the right sidebar. (If your layout is *Libris Theme 02*, you will only have a left sidebar, so your only choice in this layout is “left.”)

The *Block weight* setting is used to specify the order in which your side content boxes are sorted. Heavier boxes (with higher numbers) will sink farther down the page than lighter boxes (with lower numbers).

Now in the *Body* box, enter the text and/or images you want to add to your side content box. For instructions on inserting images, see *Section 8.1*.

In the *Input format* section, *Full HTML* should be selected (it is selected by default).

You may ignore the other options on this page.

When you're finished, click on the green *Save* button at the bottom of the page.

6.2 Edit or Delete Side Content

Edit

Click on *Content Management* in your user account menu, then *Manage Content*. Now click on *Edit* to the right of the side content you wish to edit. This will take you to a screen with the same options as for creating side content (see *Section 6.1.*) Make your changes, then go to the very bottom of the page and click on *Save*.

Delete

Click on *Content Management* in your user account menu, then *Manage Content*. Now click on *Edit* to the right of the side content item you wish to delete. Then go down to the bottom of the page and click on the *Delete* button; on the confirmation page click *Delete* again.

6.3 Change the Order of Side Content

You may change the order in which side content boxes appear in your sidebar(s). You do this by setting the **weight** of the side content box. A higher weight is "heavier" and will make the item sink toward the bottom of the page. A lower weight (or negative weight) will make the item "lighter" and it will float higher on the page.

To edit the weight of a side content box, click on *Content management* in your user account menu, and on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the side content box whose weight you want to change.

Under *Menu Settings*, open the *Weight* dropdown menu, and choose a number.

Once you have selected the *Weight* number you desire, go to the bottom of the page and click *Save*. Now go back to the front page of your website (you can do this by clicking *Home* in the top left corner), and check to see if you have successfully changed the order of your side content boxes.

Two items may have the **same** weight, but then they will be sorted alphabetically. When you are first creating content, it is good practice to choose weight numbers that are spaced at least five digits apart. This allows you to add more items later without having to change the weight of existing items.

7. Links

7.1 Add Links to Other Websites

To add a link to an external website, first **copy the entire URL** (the website address) of the webpage you wish to link to.

Then go to edit the page in which you wish to insert the link (click *Content management* in your user account menu, then on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the one you want to edit.)

In the *Body* text box, **select** (highlight) the words that you want to appear as the link to the other website.

At the top of the *Body* text box, click on the *Link* icon, which looks like this: 

A new dialogue box will open called *Link*. Paste the URL (website address) you copied into the *URL* field. In the *Target* dropdown options, select *New window (_blank)*. Then click on *Ok*. (This “Target” setting will cause the link to open in a new tab or a new window, which we typically do for links to external sites.)

Go down to the bottom of the page and click on *Save*. Now test your new link by clicking on it to make sure it works properly.

7.2 Add Links to Other Pages on Your Own Site

To add a link to a page on your own website, first **copy** the **last part** of the address of the page you want to link to, everything **after** yourlibrary.ab.ca or yourlibrary.ca. For example, if you wanted to link to www.yourlibrary.ab.ca/content/examplepage, you would copy the /content/examplepage part of the link. Make sure you **include the first slash!**

Then click on *Content management* in your user account menu (in the left sidebar after you log in), and on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the one you want to edit.

In the *Body* text box, **select** (highlight) the words that you want to appear as the link to the other page.

At the top of the *Body* text box, click on the *Link* icon, which looks like this: 

A new dialogue box will open called *Link*. **Paste** the partial URL you copied into the *URL* field. Then click on *Ok*.

Go down to the bottom of the page and click on *Save*. Now test your new link by clicking on it to make sure it works properly.

7.3 Upload and Link to Your Own Documents

To upload a document (for example, a PDF), click on *Content management* in your user account menu, and on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the page in which you wish to link to the document.

Go down to the *File Attachments* section, and under *Attach new file*, click on the *Browse* button. Find the document on your computer that you wish to upload, and double click on it. Then click on the blue *Attach* button.

Copy part of the URL for the file you just uploaded. You should copy everything after the www.yourlibrary.ab.ca or www.yourlibrary.ca part of the URL. For example, if you uploaded a file named *example.pdf*, its complete URL would be www.yourlibrary.ab.ca/sites/default/files/example.pdf, and you should only copy [/sites/default/files/example.pdf](http://sites/default/files/example.pdf) (make sure you **copy the first slash!**)

Next you will insert a link to the document. Go up to the *Body* text box, and **select** (highlight) the text you want to make into a link to your document. At the top of the *Body* text box, click on the *Link* icon, which looks like this: 

A new dialogue box will open called *Link*. **Paste** the partial URL you copied into the *Link* field. Then click on *Ok*.

Go down to the bottom of the page and click on *Save*. Now test the link to your document by clicking on it to make sure it loads the document.

Note: *It is generally best to save documents in PDF format (rather than as a Word document or other formats), as PDF is a common and easily opened format.*

*You should also choose filenames **without spaces**. You can either leave out the spaces or replace them with underscore characters. For example, rather than naming a file ProgramGuide.pdf, you should name it Program_Guide.pdf or ProgramGuide.pdf.*

7.4 Link to Another Location on the Same Page

You may create a link from one part of a page to another part of a page (for example, if you have a table of contents at the top of the page, each item can link to the corresponding section later in the page.) Usually it is a good idea to simply create multiple pages instead of a single long page. However, in the case of (for example) a “Frequently Asked Questions” page, it is better to keep the content on a single page so that users can read the entire thing more easily.

First, create an **anchor** on the page. This is the location you are **linking to**. Click on the place in the page where you want to create the anchor, and click on the *Anchor* button. It looks like a white flag: 

Give the anchor a name, and click on *Ok*. An anchor symbol will appear on your page:  (This will only appear in the edit mode, to show you where your anchor is located. It will not appear in the published version of the page.)

To create a link to the anchor, select the text you want to make into the link. Click on the *Link* icon, which looks like this: 

Under *Link* type, select *Link to anchor in the text* and in the left *Anchors* dropdown menu (*select anchor by anchor name*), select the anchor you just created. Click *Ok*.

7.5 Remove a Link

To remove a link, select the linked text and click on the *Unlink* icon – it looks like this: 

Then go down to the bottom of the page and click on *Save*.

8. Images

8.1 Add Images to Pages (or to Side Content)

To add an image to an existing page, click on *Content management* in your user account menu (in the left sidebar after you log in). On the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the page to which you want to add an image.

Click on *File Attachments* (towards the bottom of the edit page), then click on the *Browse* button. This will open a *File Upload* box that will let you choose a file from anywhere on your computer. Only the following image formats can be uploaded: *jpg, jpeg, gif, png*.

Double-click on the image you wish to upload. Then its file path will appear in the box under *Attach new file*. To actually upload the image, click on the blue *Attach* button. Do **not** put a checkmark in the *List* checkbox to the left of it. (If you put a checkmark here, the file will be listed at the bottom of your page as an attachment. Usually you don't want people to see that.)

In the URL (the website address) that appears below the *Description* of your image, highlight and **copy the second part of it, everything after** the www.yourlibrary.ab.ca or www.yourlibrary.ca part of the address. For example, if the URL displayed were www.yourlibrary.ab.ca/sites/default/files/example.JPG, you would just copy the [/sites/default/files/sample.JPG](http://sites/default/files/sample.JPG) part. **Make sure you copy the first slash** – otherwise it won't work!

Go up to the *Body* text box, and click on the *Image* icon on the top row. This icon is a picture of a house with a sun: 

In the *Image Properties* dialogue box, **paste** your copied URL into the *URL* field. In the *Alternative Text* field you may choose to add a description of your image. This will make your image more searchable in search engines, and it will provide a description of the image for users who are visually impaired.

Click on *Ok* and your image should appear in the *Body* box. Once you have done this, you can cut and paste the image as much as you like within the *Body* box until it is at your desired position. Then scroll to the bottom of the page and click *Save*.

Each file you upload to your website must be less than 10 MB in size. Try to make your files as small as possible before uploading them – then they will download faster for patrons. A good size for a website image is less than 100 KB - if you right-click on the image on your computer and go to Properties, you can see its size.

8.2 Make Images into Links

If you make an image into a link, this allows people to click on the image to go to another page.

First, insert the image as described above. Then **click** on the image to select it. Click on the **Link** icon (looks like this: ) , and for the **URL**, paste in the URL of the webpage you want the image to link to.

Important: If you are linking to a page or document on your **own** website, you should paste in a partial URL: everything after yourlibrary.ab.ca or yourlibrary.ca, including the first slash.

If you are linking to a page on **another** website, you should paste in the full URL. You may also wish to select Open in new window in the Target dropdown menu, so that the page will open in a new window or a new tab.

8.3 Delete Images

When you are editing a page, you can delete an image within the *Body* box by simply clicking on it and pressing **Backspace** or **Delete** on your keyboard.

Then under *File Attachments*, put a checkmark in the **Delete** checkbox next to that image. Click on **Save**. This will remove the attachment from the page.

8.4 Photo Gallery

A photo gallery is basically an online photo album. You might use a photo gallery for summer reading club pictures, for example, or for pictures of Halloween at the library.

Create a Photo Gallery

To create a photo gallery, click **Create Content** in your user account menu (in the left sidebar after you log in), then click on **Galleria**. Give the photo gallery a **title** (for example, “Summer Reading Club Photos”).

If you would like to link to the photo gallery from your navigation menu (optional), click on **Menu Settings**, then under **Menu link title** type in the word(s) you wish to appear in the menu. Select a **Parent item** (if you leave this set to *Main Menu*, the link to your photo gallery will appear as a **top-level** menu item; if you select a different parent item, the link to your photo gallery will appear under that parent item as a submenu link.) You can also set the position of the link in the menu; see *Section 4.1* for an explanation of how to do this.

Follow the instructions below for adding images to your new photo gallery. When you’re finished, click on the **Save** button at the bottom of the page.

Add Images to a Photo Gallery

To add an image to an existing photo gallery, first go to edit the photo gallery – click on *Content management* in your user account menu (in the left sidebar after you log in), then on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the photo gallery to which you want to add an image.

Now go down to the *File Attachments* section, and under *Attach new file*, click on the *Browse* button. Find an image on your computer that you wish to upload, and double click on it. Then click on the blue *Attach* button. It does not matter whether you have a checkmark in the *List* checkbox or not. **If you want a caption to appear under the image in your gallery**, type your caption text into the *Description* field (the text box above the image URL).

Repeat the upload process for each image you wish to upload. When you've finished adding images, go down to the bottom of the page, and click on the *Save* button.

(You can ignore all other options on this page.)

***Note:** The only image formats that may be uploaded are: jpg, jpeg, gif, and png. The maximum size of each image is 10 MB, so you may have to resize some of your photos before uploading them. Remember that smaller files will load faster; if you have several large images in your photo gallery, it may take some time for people to load the gallery.*

Change the Order of Images in a Photo Gallery

To change the order of the images in a photo gallery, first go to edit the photo gallery – click on *Content management* in your user account menu (in the left sidebar after you log in), then on the next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the photo gallery to which you want to add an image.

In the list of photos under *File Attachments*, you can drag images into a different order by dragging the arrowed cross at the far left of each photo in the list. The arrowed cross looks like this: 

When you're finished, click on the *Save* button at the bottom of the page.

Delete Images in a Photo Gallery

To delete an image in a photo gallery, first go to edit the photo gallery – click on *Content management* in your user account menu (in the left sidebar after you log in), then on the

next screen, click on *Manage content*. In the list of pages on your website, click on *Edit* next to the photo gallery in which you want to delete an image.

Click on the *Delete* checkbox next to the image you wish to delete (so that there is a checkmark in the box). Then click on the *Save* button at the bottom of the page.

9. Library Information (Hours / Contact / Location)

To edit the information displayed in the *Library Information* sidebar box, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*.

Under **Show Only Items Where**, click on the button next to *Type*, select *Library Information* from the dropdown menu, and click on the green *Filter* button. This will ensure only the *Library Information* content is displayed on the screen. (To reset your *Manage content* screen to display everything, simply click on the red *Reset* button.)

You should now see three pages, called: *1-Hours*, *2-Contact*, and *3-Location*. These correspond to the three tabs in your *Library Information* box.

Edit the Hours Info

Click on *Edit* to the right of the *1-Hours* page.

DO NOT change the title of this page! The *only* part of this page you should edit is the *Body* text box, as described below.

In the *Body* text box, you will see a table listing your library's hours. If you need to **delete** one of the rows in the table, select some text in that row, **right-click** on it, go to *Row*, then *Delete Row*. If you need to **add** another row to the table, select some text in that row, **right-click** on it, go to *Row*, then click on either *Insert Row Before* or *Insert Row After*.

If you only need to change some text, click on the cell you need to change, delete the old text and type in your new text.

When you have finished, click on the green *Save* button at the bottom of the page.

Edit the Contact Info and the Location Info

If you wish to edit the contact information, click on *Edit* to the right of the 2-*Contact* page. If you wish to edit the location information, click on *Edit* to the right of the 3-*Location* page.

DO NOT change the title of either page! The *only* part of the page you should edit is the *Body* text box. You can edit the *Body* text box as you normally would (type in whatever text you want, and use the formatting buttons as you wish).

When you have finished, click on the green *Save* button at the bottom of the page.

10. Events Calendar

The calendar is displayed in the sidebar of your website. It is an **optional** part of your website; if you would like your calendar to be removed, contact the Helpdesk at helpdesk@peacelibrarysystem.ab.ca).

10.1 Add an Event

To **add** an event to your calendar, click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *Event*.

Type in a **title** for the event (this is mandatory and **will** be displayed.) Type in a description for the event in the *Body* text box.

In the *Input Format* section, *Full HTML* should be selected (it is selected by default).

You can ignore the *Revision Information* option.

If you wish to allow people to comment on the event, click on *Comment Settings* and select *Read/Write*.

If you wish to attach a file to the event (for example, a pdf of an event poster), use the *File Attachments* feature. See *Section 7.3* for more details on using this feature.

Under *Date*, you **must** add a start and end date for the event (you may also add start/end times if you wish). If it is a single-day event, enter the same day for the start and end dates.

Under *Repeat*, you can set the event to repeat on a regular basis. If you do **not** want the event to repeat, ignore this section.

You can ignore *Authoring Information* and *Publishing Options*.

When you have finished entering your event information, click on the green *Save* button at the bottom of the page.

10.2 Edit or Delete an Event

To **edit or delete** an event, click on the **date of the event** in the calendar on your front page. Then click on the **title of the event**, and a popup window will appear containing event information. Click on the **title of the event** in the popup window.

Click on the *Edit* tab.

If you wish to **edit** the event, make your changes on this page, then click on the green *Save* button at the bottom of the page.

If you wish to **delete** the event, click on the red *Delete* button at the bottom of the page, then click on *Delete* again on the confirmation page.

11. Online Bookshelves

11.1 Create an Online Bookshelf

An Online Bookshelf is a horizontal list that shows the cover art, titles, and authors for a list of books, CDs, or DVDs. This list can be named anything you wish – for example, Recommended Reading, New DVDs, Staff Picks, etc.

To create a new Online Bookshelf, click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *Online bookshelf*.

On the next screen, **give your Online Bookshelf a title** (such as “Staff Picks”). At this point, the *Status* of the *Online Bookshelf* is set to *Unpublished*. You should leave it as *Unpublished* until you have finished adding titles to it. Ignore the *Domain Access* section on this screen.

Click on *Create*.

To **add titles** to your new Online Bookshelf, click on *Add new item* under *Items*.

Then **enter the ISBN or UPC** for the title you wish to add and then hit the **tab** key on your keyboard. (UPCs are useful for DVDs or CDs that lack ISBNs.) The title and author

information will usually appear automatically, based on the ISBN. (You may enter the title and author yourself if they don't automatically load, or you may edit them if you wish.)

Click on *Save New* to add your title to the list. You will then be taken to a new *Add new item* page, where you can add another item. Repeat this for as many titles as you wish to add. When you wish to return to the list of all items on your Online Bookshelf, click on the *Back to list* link at the bottom of the page.

When you are ready to publish your Online Bookshelf, change the *Status* (under *List Properties*) to *Published*, and click on the green *Update* button. Return to your front page to see your newly created Online Bookshelf. To display your Online Bookshelf on a page *other* than your front page, follow the instructions in *Section 11.6*.

***Make sure you check** that each of the titles in your new Online Bookshelf links correctly to the title in our catalogue! This will usually happen automatically, but occasionally might not – for example, if you enter the American ISBN and only the Canadian ISBN is present in our catalogue record, the link will not work. (The link to the catalogue is based on the ISBN or UPC number you provide.)*

11.2 Unpublish an Online Bookshelf

To unpublish an Online Bookshelf (if you don't want people to see it on your website, but you also don't want to delete it), click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Online bookshelves - list*. You will see a list of all your existing Online Bookshelves.

Click on *Edit* next to the one you wish to unpublish, and under *List Properties*, select the *Unpublished* status. Click on the green *Update* button.

11.3 Delete an Online Bookshelf

To delete an Online Bookshelf, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Online bookshelves - list*. You will see a list of all your existing Online Bookshelves. Click on *Delete* next to the one you wish to delete, and then on the confirmation page click on *Delete* again.

11.4 Add or Delete Items in an Existing Online Bookshelf

To add or delete items in an Online Bookshelf, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Online bookshelves - list*.

Click on *Edit* to the right of the Online Bookshelf you wish to edit.

To **delete** items from the list, click on the checkbox to the left of the items. To select **all** items at once, click on the checkbox to the left of *Weight* at the top of the list of items.

When you have checkmarks next to all items you wish to delete, click on the red *Remove Selected Items* button, and then click *OK*.

To **add** an item to the list, click on *Add new item* near the bottom of the edit page. **Enter the ISBN or UPC** for the title you wish to add and then hit the **tab** key on your keyboard. (You may enter the title and author yourself if necessary.) Click on *Save New* to add it to the list. You will then be taken to a new *Add new item* page, where you can add another item. Repeat this for as many titles as you wish to add. When you wish to return to the list of all items on your Online Bookshelf, click on the *Back to list* link at the bottom of the page.

When you have **finished** editing your Online Bookshelf, you may click on *Back to all lists* to return to the list of all your existing Online Bookshelves.

11.5 Change the Item Order in an Online Bookshelf

To change the order in which items are displayed in an Online Bookshelf, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Online bookshelves - list*.

Click on *Edit* to the right of the Online Bookshelf you wish to edit. Then click on *Edit* beside the title you wish to move up or down in the list. Enter a *higher* number in *Weight* to make appear lower in the list, or a *lower* number to have it appear earlier in the list. Then click on *Update Item*.

Note: If two items in a list have the **same** Weight, they will be sorted alphabetically. For more information on Weight, see Section 5.1.

11.6 Set the Page where an Online Bookshelf is Displayed

If you would like an Online Bookshelf to be displayed on a page other than your front page, please contact the Helpdesk (helpdesk@peacelibrarysystem.ab.ca).

11.7 Change the Order of Bookshelves Displayed on the Same Page

You may have multiple Online Bookshelves on the same page (for example, two on your front page). If you would like to change the order in which these Online Bookshelves are displayed, contact Helpdesk (helpdesk@peacelibrarysystem.ab.ca).

11.8 PLS Shared Online Bookshelf

PLS maintains an Online Bookshelf that is updated approximately once a month, on a topic such as award winners or books based on a theme. This bookshelf is on the front page of your website and displays **underneath** any bookshelf you have created.

If you do not wish to have the PLS-maintained Online Bookshelf added to your website, contact the Helpdesk (helpdesk@peacelibrarysystem.ab.ca) and it will be removed.

12. Banners

12.1 Add a Banner to Your Website

A banner is a rotating slideshow that automatically plays when someone arrives at the front page of your website.

To add a rotating banner to your front page, you will create a separate banner for **each** image you upload. (These banners will be displayed together in a single slideshow.)

First, create or obtain the images you wish to use for your banner. (PLS has supplied many images you can use – to find these, just click on the *Get Images from PLS* link in your user account menu.)

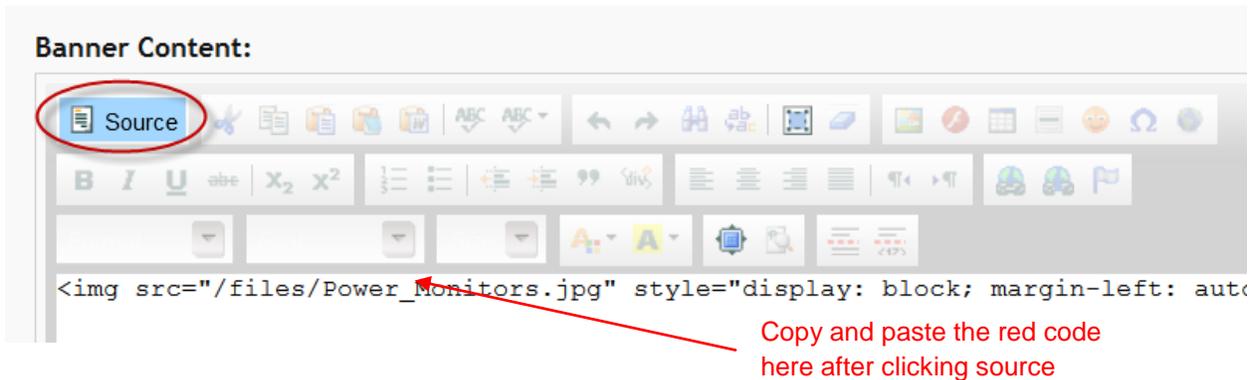
Then click on *Create content* in your user account menu (in the left sidebar after you log in), and click on *Banner* (at the top of the page).

Give the banner a **title**. This title will **not** be displayed, but it's necessary to enter it (it's like giving it a filename). An example title is "Summer Reading Club Banner."

PLS may add default banners to all websites. If you wish to have a PLS added banner removed or wish to not have any future banners added by PLS, please contact the Helpdesk at helpdesk@peacelibrarysystem.ab.ca.

To add one of PLS' banner images

Click on *Source* under the *Banner Content* heading, and then in the *Body* box, **copy and paste the red code** from the page where you found the image. Then go to the bottom of the page and click *Save*.



To add your own banner image

Click on *File attachments* (towards the bottom of the page), and click on *Browse*. Find the first banner image you want to use, and **double click** on it. Then click on the blue *Attach* button to upload it.

In the URL for the image you just uploaded (which should look something like www.yourlibrary.ab.ca/sites/default/files/banner.jpg), copy the part after yourlibrary.ab.ca – in this example, `/sites/default/files/banner.jpg` (make sure you include the first slash!)

Go up to the *Body* text box, and click on the *Image* icon on the top row. This icon is a picture of a house with a sun: 

In the *Image* dialogue box, **paste** your partial URL into the *URL* field. In the *Alternative Text* field you may choose to add a description of your image. This will make your banner image more searchable in search engines, and it will provide a description of the image for users who are visually impaired.

Click on *Ok* and your image should appear in the *Body* box. You may type in any text you wish to appear along with the image. You should also select the image and click on the *Align center* icon to **ensure it is centered in the banner**.

Then scroll to the bottom of the page and click *Save*.

Now create a second banner, and upload a second banner image for it. You will need to create **at least two** banners in order to make the rotating banner on your front page work properly.

Note 1: The *maximum width* of images for banners on Biblio (Theme 01) is **484 pixels**, and for banners on Libris (Theme 02) is **608 pixels**. There is no limit on banner height, but it is best to make sure all your banner images are the same height as one another. If you upload images that have different heights, the height of the banner area will be set to the height of your tallest image (so there will be extra whitespace under the shorter images).

The file size of each image should also be relatively small, to speed up loading time – it's good to keep each image under 100 KB.

Note 2: You may only have **one banner at a time**, and it will only display on your front page (not any of your other pages).

12.2 Change the Order of Banners

The *Weight* setting for a banner determines its position in the slideshow. “Heavier” banners move to the right (i.e., later in the slideshow), and “lighter” banners are located farther to the left (earlier in the slideshow.)

To change the weight of a banner, first click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*.

Click on *Edit* to the right of the banner whose weight you wish to change. Change the *Block Weight* setting (near the top of the page) to a different number. Go to the bottom of the page and click on *Save*.

PLS may add default banners to all websites. These will begin with a weight of 10. Please weight your own banners between 0 and 9. If you wish to have a PLS added banner removed, please contact the Helpdesk at helpdesk@peacelibrarysystem.ab.ca.

12.3 Delete a Banner from Your Website

To delete an existing banner, first click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*.

Click on *Edit* to the right of the banner you wish to delete. Click on the red *Delete* button at the bottom of the page, then click *Delete* again on the confirmation screen.

13. News

News items are announcements that are automatically published to the front page. If you wish, you can have a separate *News* page in addition to (or instead of) publishing *News* items to the front page.

13.1 Create a News Item

Click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *News*.

Under *Title*, **enter the title** for the news item. For example, “Summer Reading Club,” “Author Talk at the Library,” or “Halloween Party.”

Click on the *News Date* field, and then you may either type in a date (format: YYYY-MM-DD) or select a date from the calendar.

Ignore the *Menu Settings* unless you want to create a menu link directly to this news item. (If you do want to create such a link, enter the text for the link under *Menu link title*, choose a *Parent item* out of that dropdown menu, and choose a *Weight* to specify the menu link location. These options are explained more fully in *Section 5.1*.)

Under *Body*, type in your news.

Input Format should be set to *Full HTML* (it is set that way by default).

Under *Show on Latest News*, leave *Yes* selected if you want the news item to show up under *Latest News* on your front page. Select *No* if you do **not** want the news item to appear on your front page.

You can **ignore** the rest of the settings on this page, unless you want to change the way in which the news item displays on your front page, which you can do under *Publishing Options* as follows:

- Put a checkmark next to *Sticky at top of lists* if you want the news item to appear at the **top** of your *Latest News*; otherwise, the news items will sort chronologically.
- Put a checkmark next to *Promoted to front page* if you want the news item to be displayed **separately** on your front page, rather than under *Latest News*. If you put a checkmark here, make sure you select *No* in the *Show on Latest News* dropdown menu; otherwise the news item will be displayed **twice** on your front

page. Also note that putting a checkmark next to *Promoted to front page* also means that the **entire** news item will be displayed on your front page, whereas *Latest News* displays a short excerpt with a *Read More* link.

Click *Save*.

13.2 Create a Menu Link to a News Page

Your website has a [/news](#) page that is automatically generated and contains any *News* items you have created. For example, on the Valleyview website, this page is at:

www.valleyviewlibrary.ab.ca/news

Since this page already exists, if you want to add a link to it in your navigation menu, you simply need to create a direct link. To do this, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Main menu*. At the top of the page, click on the *Add item* tab.

Under *Path*, type in: **news**

Under *Menu Link Title*, type in the text you want to appear as the menu link. For example, you might want to simply type in “News.”

We normally do **not** enter anything under *Description*. If you do enter text here, the text will appear in a little popup box when you hover over the menu link with your mouse.

Leave the checkmark next to *Enabled* – this simply means the menu link will be visible. (Disabling a menu link is just like unpublishing a page.)

Leave the checkbox empty next to *Expanded*.

In the *Parent item* dropdown menu, choose the parent item for your “News” menu link. If you leave the *Parent Item* set to *Main Menu*, then the link to your page will appear in the main menu of your website. If you want the link to appear under an existing menu item, select that menu item in the list.

The *Weight* dropdown menu can be used to set the location of the menu link in the menu. However, there is an easier way to do this, so skip it here.

Ignore *Restrict Menu Item Visibility*.

Click *Save*.

Now to change the location of your new menu link, click on the arrowed cross to the left of it, and drag and drop it to another location in the menu. (The arrowed cross looks like this: ) You can also drag the arrowed cross to the right to make your menu link appear “under” another menu link (as a submenu link).

When your menu link is located where you want it, click on the green *Save configuration* button.

14. Blog

A blog is an online space where you can post articles, book reviews, or library news, and have an interactive discussion with your patrons.

14.1 Post a Blog Entry

To post a blog entry, first click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *Blog post*.

Under *Title*, enter a title for your current blog post.

Under *Tags*, you may choose to enter one or more topics for your post. If you enter more than one topic, separate them with a comma. (Tags are like subject headings in the catalogue, and you can use them to find other posts tagged with the same topic. For example, if you give a blog post about Halloween at the library a tag of “Halloween,” and do another blog post with the same tag the following year, people will be able to click on the “Halloween” tag to see both posts.)

Under *Body*, type the text of your blog entry.

You can **ignore** the rest of the settings on this page, and click *Save*. Your most recent blog post (if you have created any) will be featured in your sidebar, with a short excerpt from the post and a link to the full text. (This will be located in your **right** sidebar if you have the three-column layout, or in your **left** sidebar if you are using the two-column layout.)

14.2 Manage Blog Comments

When a patron posts a comment about one of your blog entries, the comment will be automatically published. However, some comments are spam and should be deleted.

You can view all published comments on your website by clicking on *Content management* in your user account menu (in the left sidebar after you log in), then *Comments*.

Under *Subject*, you can click on the title of each comment if you wish to read the text of the comment.

To **delete** a comment, add a checkmark to the left of it, then choose *Delete the selected comments* out of the *Update Options* dropdown menu. Then click on *Update*, then *Delete comments*.

To **unpublish** a comment, add a checkmark to the left of it, then choose *Unpublish the selected comments* out of the *Update Options* dropdown menu, and click *Update*. To view any unpublished comments, click on the *Approval queue* tab (towards the top of your *Comments* screen).

14.3 Create a Menu Link to a Blog

Your website has a */blog* page that is automatically generated and contains any *Blog Posts* you have created.

Since this page already exists, if you want to add a link to it in your navigation menu, you simply need to create a direct link. To do this, click on *Site building* in your user account menu (in the left sidebar after you log in). Then click on *Main menu*. At the top of the page, click on the *Add item* tab.

Under *Path*, type in: **blog**

Under *Menu Link Title*, type in the text you want to appear as the menu link. For example, you might want to simply type in "Blog."

We normally do **not** enter anything under *Description*. If you do enter text here, the text will appear in a little popup box when you hover over the menu link with your mouse.

Leave the checkmark next to *Enabled* – this simply means the menu link will be visible. (Disabling a menu link is just like unpublishing a page.)

Leave the checkbox empty next to *Expanded*.

In the *Parent item* dropdown menu, choose the parent item for your "News" menu link. If you leave the *Parent Item* set to *Main Menu*, then the link to your page will appear in

the main menu of your website. If you want the link to appear under an existing menu item, select that menu item in the list.

The *Weight* dropdown menu can be used to set the location of the menu link in the menu, but skip this, as there is an easier way to do that.

Ignore Restrict Menu Item Visibility.

Click *Save*.

Now to change the location of your new menu link, click on the arrowed cross to the left of it, and drag and drop it to another location in the menu. (The arrowed cross looks like this: ) You can also drag the arrowed cross to the right to make your menu link appear “under” another menu link (as a submenu link).

When your menu link is located where you want it, click on the green *Save configuration* button.

15. Polls

A **poll** allows you to ask patrons a **single** question that is multiple-choice. If you want to ask more than one question, or if you want to allow people to type in their own answers, you should create a **webform** survey instead (see *Section 16*.)

Polls are displayed in the left sidebar of your website. You may only have **one** poll displayed at a time.

15.1 Create a Poll

To create a webform, first click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *Poll. Type in* the question for your poll (you may only ask one question). Then type in the possible **answers** to your poll as the *Choices*. To add another possible answer (or *Choice*), click on *Add another choice*.

Under *Poll Settings*, leave the *Poll Status* set to *Active*. Choose a *Poll duration* out of the dropdown menu – if you leave this set to “unlimited,” the poll will never automatically close. If you choose, for example, “2 weeks,” the poll will automatically close after two weeks and patrons will no longer be able to submit responses.

The *Comment settings* are set to *Read/Write* by default. You should change this to *Disabled* if you do **not** want visitors to be able to make comments **about** the poll. (They will still be able to vote in the poll.)

You may leave the *Publishing Options* on default settings, but if you are not yet ready to publish the poll, uncheck the *Published* checkbox. (You will need to *Publish* it later before people will be able to vote in it.) Also, do not put a check mark next to *Promoted to front page* unless you want the poll to be displayed in the centre of your homepage **as well as** in the left sidebar (it will always be displayed in the left sidebar by default.)

15.2 View Poll Answers

Click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*, and click on the **title** of your poll. Click on the *Results* tab.

(If there is no *Results* tab, it is because you voted in the poll yourself. The results will then automatically appear when you click on the title of your poll.)

You may also click on the *Votes* tab to see a list of the individuals who submitted votes (for anonymous users, the IP address is given).

15.3 Edit or Delete a Poll

Edit

Click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*, and click on *Edit* to the right of your poll.

When you have made your changes, go to the bottom of the page and click on *Save*.

Delete

Click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Manage content*, and click on *Edit* to the right of your poll.

Go to the bottom of the page and click on *Delete*. Click on *Delete* again when it asks if you are sure.

16. Webforms

A webform is a form or questionnaire that people can fill out on your website. Possible uses for webforms are program registration forms, suggestions for purchase, contact us or email us forms or surveys.

You can set a webform to email you every time someone fills out the form.

16.1 Create a Webform

To create a webform, first click on *Create content* in your user account menu (in the left sidebar after you log in). Then click on *Webform* (at the bottom of the page). Enter a title for your webform. If you wish, add a description of your webform in the textbox below the title.

In the *Input Format* section, the *Full HTML* option should be selected (it is by default).

If you wish to upload a file and attach it to this form, you can do so under *File Attachments*. (For more detailed instructions, see *Section 7.3*.)

If you do not want your webform to be published yet, **uncheck** the *Published* checkbox under *Publishing Options*.

You may ignore the rest of the options on this page.

Click on *Save*.

Components

On the next screen, you can add components or fields to your webform. These are the places where people can enter information. In the text box where it says *New component name*, enter a **title** for your component. For example, if you are creating a webform for people to suggest titles for your library to purchase, you might call your first component "Suggested Title."

Next, in the dropdown menu under *Type*, select a *type* for your new component. The most commonly used types are:

Textfield – Use this if you expect people to enter a *small* amount of text in this part of the form (one sentence or less).

Text area – Use this if you expect people to enter more text (this will give them a text box in which to type).

Email – Use this if you expect the patron to enter an email address.

Select options – Use this to provide a list of options (for example, a dropdown menu).

File or **Multifile** – Use these to allow the patron to upload a file (use Multifile to allow multiple files to be uploaded.)

If you have questions about what component type to use, contact the Helpdesk.

If you add a checkmark to the *Mandatory* checkbox for a component, patrons will be required to enter something in that field when they fill out the form. They will not be allowed to submit the form until they respond to all mandatory questions.

In order to add your new component, click *Add*.

Now you will be taken to a page where you can edit more settings for this component.

For the Textfield, Text area, and Email components, you do not have to change anything on this page – if you wish, you can leave everything on default settings, and simply click on *Save component*. However, here is an explanation of the various options on this page:

If the component is a textfield, you will see:

Label – This is mandatory; it is the text that will be displayed above the field.

Field key – Ignore this.

Default value – If you want text to be pre-entered in the field without the user having to type it in, enter the text here. Users will be able to delete the text and enter something else if they wish.

Token values – For advanced users only. You can safely ignore this.

Description – If you feel this part of the form needs an explanation, enter the explanation here. The explanation will be displayed on the form (in small print right under the field the explanation belongs to).

CAPTCHA – Ignore this. If you want users to be required to answer a “captcha” question (i.e., to have to type in the letters or numbers that are displayed, to prove they’re human – this is to prevent spam submissions), contact Helpdesk and PLS staff will add the captcha to your webform for you.

Validation – The only field you will likely want to change here is the *Maxlength* setting – you can use this to limit the number of characters people can enter in this field. For example, if you typed 4 in this field, people would not be able to enter more than 4 characters – if they tried to type the word “yellow,” they would only be able to type “yell” before not being able to type any more.

Display – Use the *Width* setting to set the width of the field (by entering a number – this is interpreted as the number of pixels.)

Label placed to the left of the textfield – If you want to add a label to the left of the field, enter it here. *Note:* The **title** of the field will be displayed **above** the field; you may not need to add any additional labeling.

Label placed to the right of the textfield – If you want to add a label to the right of the field, enter it here.

Label placement – This sets where the **name** of the textfield appears (i.e., the question you are asking the user). It is set to “above” by default, but you can choose “inline” if you want it to appear *beside* the textfield.

Disabled checkbox – Check this box if you *do not want* users to be able to type in this field. The field will then be displayed in the form, but people will **not** be able to enter information into it, and will not be able to edit the Default value if there is one.

Private – Add a checkmark here if you want to “unpublish” this component so that patrons cannot see it. The component will still be saved and you can “publish” it again later by unchecking the *Private* checkbox.

*If the component is a **text area**, you will see most of the same options as for a textfield, as well as:*

Height – Use this to set the height of the text area.

Resizable – If this checkbox is checked, users will be allowed to resize the text area if they wish. If the checkbox is not checked, they will not be able to resize it.

Hide label – If this checkbox is checked, the question you are asking will **not** be displayed.

*If you set the component type to **email**, you will see most of the same options as for a textfield, as well as:*

User email as default – Put a checkmark in this checkbox if you want the email address of logged in users to be automatically entered in this field. (At present patrons *cannot* log in, so this function will not be relevant for most forms.)

*If you set the component type to **Select options**, you will see most of the same options as for a textfield, as well as:*

Options – Enter the list of answers you want the user to choose from (click on *Add item* to create another possible answer).

If you chose to enter an answer in the *Default value* field, you should also enter that answer in this list.

You can use the arrowed cross to the left of each possible answer to drag the answer up and down in the list.

Click on *Customize keys* only if you plan to create a customized email to be generated when a patron fills out the form. (See the *Email settings* section below for more info on this.)

Multiple – Put a checkmark here if you want to allow the user to choose more than one answer.

Listbox – Put a checkmark here if you want the possible answers to be displayed in a dropdown menu. (Otherwise they will be displayed with radio buttons – i.e., circles the user can click on.)

Randomize options – Check this box if you want the options to be displayed in a random order.

*If you set the component type to **file** or **multifile**, you will see many of the same options as for a textfield, as well as:*

Upload Directory – Ignore this.

Validation – Add a checkmark next to *Mandatory* if you want to force users to upload a file before they can submit the form. Also, pay attention to the file types that have checkmarks next to them – these will be the only file types users are allowed to upload.

When you have finished editing settings, click on *Save component* to save your new field.

Change the order of the components

Change the order of the components (or questions) in your webform by dragging and dropping the arrowed cross, which looks like this:  (The arrowed cross is to the left of each component.)

Email settings

When you have finished creating your webform components, click on the *E-mails* tab (next to the *Form components* tab, in the upper right section of the page.) Here you can edit the email settings for the form.

If you want to be **emailed** every time someone submits the form, enter your email address here, and click *Add*. (Otherwise, the form submissions will be saved on your website but you will not be notified when someone submits the form; you will have to log in to your website, go to the form, and look at the *Results* tab to see the submissions.)

If your form asks for an email address, you can also set it up to send the patron a confirmation email when the form has been submitted. To do this, select *Component value*, and choose the **email component** out of the dropdown menu, as shown. Then click *Add*.

E-mail to	Subject	From	Operations
Currently not sending e-mails, add an e-mail recipient below.			
<input type="radio"/> Address:	<input type="text" value="email@example.com"/>		<input type="button" value="Add"/>
<input checked="" type="radio"/> Component value:	<input type="text" value="Email"/>		

When you click *Add*, you will be taken to the *Edit E-Mail Settings* screen where you can enter the following information:

- *Email to address* – This is the email address the submission should be sent to. You can either enter your own email address here, or select the patron’s own email address (by choosing the *Component* option and selecting the email component out of the drop-down menu. For this to work, you **must** have already created a component in the webform that asks the patron for an email address.)

- *Email subject* – This is the subject line the email will have. By default, it is set to the name of your webform, but you can enter any subject you want by selecting the *Custom* option.
- *Email from address* – The “from address” for the email. When you’re setting up an email to your own library address, it is sometimes useful to set the “from” address to the patron’s email address (by selecting *Component* and then, in the dropdown menu, selecting the email component you created in your webform.)
- *Email from name* – The “from name” for the email. You may wish to enter the name of your library in the *Custom* field. If you asked the patron to enter a name, you can set the “from name” to be the patron’s **own** name (by selecting *Component* and then, in the dropdown menu, selecting the webform component where you asked for the person’s name.)
- *Email template* – **You can skip this if you wish.** By default, all information submitted in the form will be included in the email.

Note for advanced users: If you are familiar with HTML, you can use it to format the email that is generated.

Also, you will notice “%email_values” in the default template text. This is called a “token” – it’s a variable that tells the system what you want to include in the email; in this case, it will by default include everything that was submitted in the form. If you want to include only *some* of the submitted information, you can do so using other tokens:

%email[key] – provides the question AND answer for a particular component

%value[key] – provides ONLY the answer for a particular component

%submission_url – provides a link to the information the patron submitted

The [key] value refers to the *Field Key* setting for a particular component. You can view or change the *Field Key* of a component by clicking on *Edit* for that component; the *Field Key* is the second field displayed on the *Edit* screen.

So, for example, if you have a component with the *Field Key* set to “subject,” you could use %value[subject] to enter the user’s response to that component.

Note that you can also do this in the other *E-mail Settings* fields – for example, if you had a Suggestion for Purchase webform, and wanted the *E-mail subject* to be “Title suggestion: [then the title suggested by the patron],” you would enter “Title suggestion: [title]” into the *E-mail subject* field (assuming your *Field Key* for the patron’s suggested title is set to “title”).

- *Included E-mail Values* – You usually want to set this to “include all components.” That means if you haven’t made any changes to the *E-mail Template* section, **all** the information submitted by the user will be included in the email sent to you.

Note for advanced users: This setting controls what is included in the %email_values token.

Form settings

Click on the *Form settings* tab (next to the *E-mails* tab, in the upper right section of the page.)

This is where you can enter a customized “confirmation message” that people will see after submitting the form – just type it into the *Confirmation message* field. If you enter **nothing** here, people will see the default message: “Thank you, your submission has been received.”

You can ignore the rest of the settings on this page, and click *Save*.

Publish your webform

When you have finished creating your webform, you will need to publish it (if you created it as an unpublished webform).

If you have just finished adding components, click on the *Edit* tab at the top, go to the bottom of the page, click on *Publishing Options*, add a checkmark next to *Published*, and click *Save*.

If you are returning to the webform at a later point, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Webforms*, and click on *Edit* next to your webform. Go to the bottom of the page, click on *Publishing Options*, add a checkmark next to *Published*, and click *Save*.

Link to your webform

You will need to create a link to your webform on your website so that people can find it. See *Section 7.2* for instructions on how to add this link to a page on your website, or see *Section 4* for instructions on creating a link in your navigation menu.

16.2 Edit a Webform

To edit a webform, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Webforms*, and then click on *Edit* to the right of your webform.

This will take you to a page where you can edit the title and description. To edit the rest of the webform's settings, click on the *Webform* tab. For details on this, see *Section 16.1*.

16.3 View or Delete Webform Submissions

When someone fills out a webform and submits it, the information will be sent to the email address you provided when creating the webform. You can **also** access this information by logging on to your website. To do this:

- 1) Log on to your website.
- 2) Click on *Content management* in your user account menu (in the left sidebar after you log in).
- 3) Click on *Webforms*.
- 4) Click on *Submissions*, *Analysis*, *Table*, or *Download* to view or download the form submissions. Click on *Clear* to delete all form submissions you have received up until now (this does not delete the form itself, just the data people have sent in).

16.4 Delete a Webform

To edit a webform, click on *Content management* in your user account menu (in the left sidebar after you log in). Then click on *Webforms*, and then click on *Edit* to the right of your webform. Go to the bottom of the page, click on the red *Delete* button, and click *Delete* again on the confirmation page.

16.5 Add “Captcha” Security Question to Prevent Spam

If you are getting too much spam from a webform, you can add a “captcha” question people must answer before they are allowed to submit a response. For example, a “captcha” question would look like this:

CAPTCHA

This question is for testing whether you are a human visitor and to prevent spam submissions.



If you would like a “captcha” question added to a form on your website, **PLS staff will do this for you** – just contact Helpdesk (helpdesk@peacelibrarysystem.ab.ca).