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Participant course notes

## Applications: enabling and renaming

These pre-configured applications allow you to organise your information effectively and deliver it to your user in a way that increases sharing and interactivity. You will find them in Content Management.

### Applications

Add Private Area

Application	Enabled	Actions	Show in Navigation
Classified Ads	No	Enable	
Discussions	No	Enable	
FAQs	No	Enable	
Feeds	No	Enable	
Form Builder	No	Enable	
Job Listings	No	Enable	
Noticeboard	No	Enable	
Our Files	No	Enable	
Petitions	No	Enable	
Photo Album	No	Enable	
Polls	No	Enable	
Surveys	No	Enable	
Useful Links	No	Enable	
Weblog	No	Enable	
What's on	Yes	Disable Permissions Rename Manage this Application	<input checked="" type="checkbox"/>

Note: You can also click on Disable to remove the application from your website if you no longer need it

1. Click Enable to add a new application
2. Choose a URL for the application

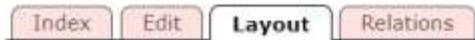


3. Rename - changes the name in the Applications list and in the Navigation bar (that your visitors will see)
4. Show in Navigation - this is ticked by default. Un-tick if you do not want it to show in your top level navigation
5. Click Manage this Application to start adding your information

If you don't include in the navigation but want to include it on a 2nd level navigation e.g. under about us you'll need to create a re-direct page first, then copy and paste the live URL of the application into the field provided.



## What are includelets?



Cancel and go back

### Pick an includelet for the Top slot

- ▶ Background image begin
- ▶ Background image end
- ▶ Child communities
- ▶ Child list
- ▶ Community calendar
- ▶ Community forums
- ▶ Community information
- ▶ Community surveys
- ▶ Email contact form
- ▶ Contact information
- ▶ Content item
- ▶ Content item metadata
- ▶ Contributions
- ▶ Custom
- ▶ Filtered item list
- ▶ Filtered item list keywords
- ▶ Google translate
- ▶ Item list
- ▶ Join group
- ▶ Latest news
- ▶ Members
- ▶ Navigation
- ▶ Poll
- ▶ Random item
- ▶ Raw HTML
- ▶ Related image gallery
- ▶ Rss feed
- ▶ Shared communities
- ▶ Site map
- ▶ Slider
- ▶ Vimeo Video
- ▶ YouTube Video

'Includelets' are primarily used to automatically generate dynamic snippets of information to display on your webpage.

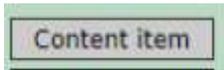
Includelets help you to:

- Add pieces of information to your page to make it more interesting e.g. images
- Bring information into your site from another organisation's website (embedding content e.g. widgets).
- Display information that updates automatically from another part of your site (some are directly related to applications)
- Set information to appear on all pages within a section or across the whole site e.g. blog posts

The includelets you are most likely to use are:

**Custom** – a blank box that has the same editing options as a webpage e.g. add photos, text and more

**Filtered item list** – customised display of content from other pages, in grids or lists

The 'Content' includelet  is your main webpage - so don't delete it! You can add other includelets above and below the content item to structure your webpages effectively.

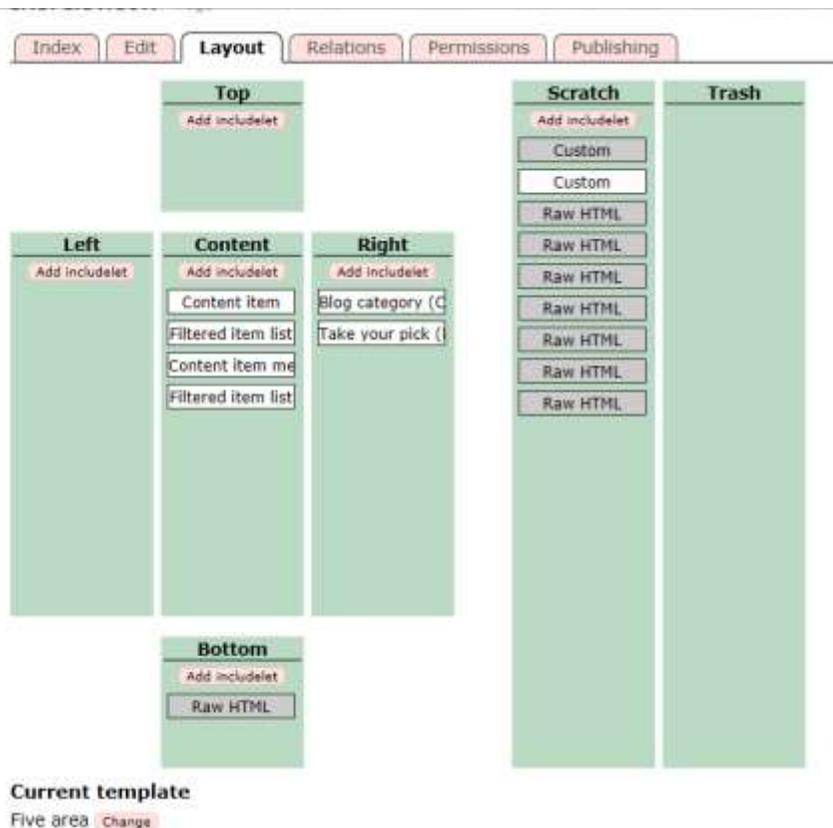
# Structuring your website using columns and includelets



Column layout and includelet placement offer a way of structuring your website

1. Choose a page to edit
2. Move from the Edit tab to the Layout Tab

This will show you a diagram of the structure of your page. You can choose a different layout for each page.



**Content item** – the main section of your page. If you never added anything into the other columns and only used the central Content column everything on your site would be full width of the page. (But you edit the text in this box in the Edit tab of your webpage!)

**Right or Left** – if you have a page layout with more than one column

**Relations** - you can add a related image or related webpages - enables you to display multiple pieces of related content on another webpage e.g. in a grid of images with teaser text

**Scratch** – doesn't display on your site but saves it in case you want to use it again

**Trash** – area to move any includelets that you don't want and won't need again. These are removed permanently

## Changing layout and adding includelets



Changing column layouts and adding includelets

1. Click on the red link "Create a new revision to make changes"



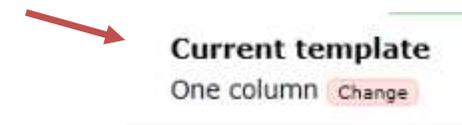
2. Now the includelets will turn white and be editable
3. Double click on the includelet to open it for editing
4. Click on 'Add includelet' to start adding dynamic information to your website

Croydon Mencap webpage structures - which column template should I choose?

Whilst the website may show a five column area ins some cases, most of the time you will structure your website using Filtered Item List and Item List includelets:

To change the column template:

At the bottom of the layout tab, click on 'Change' under Current template



## Removing and moving includelets

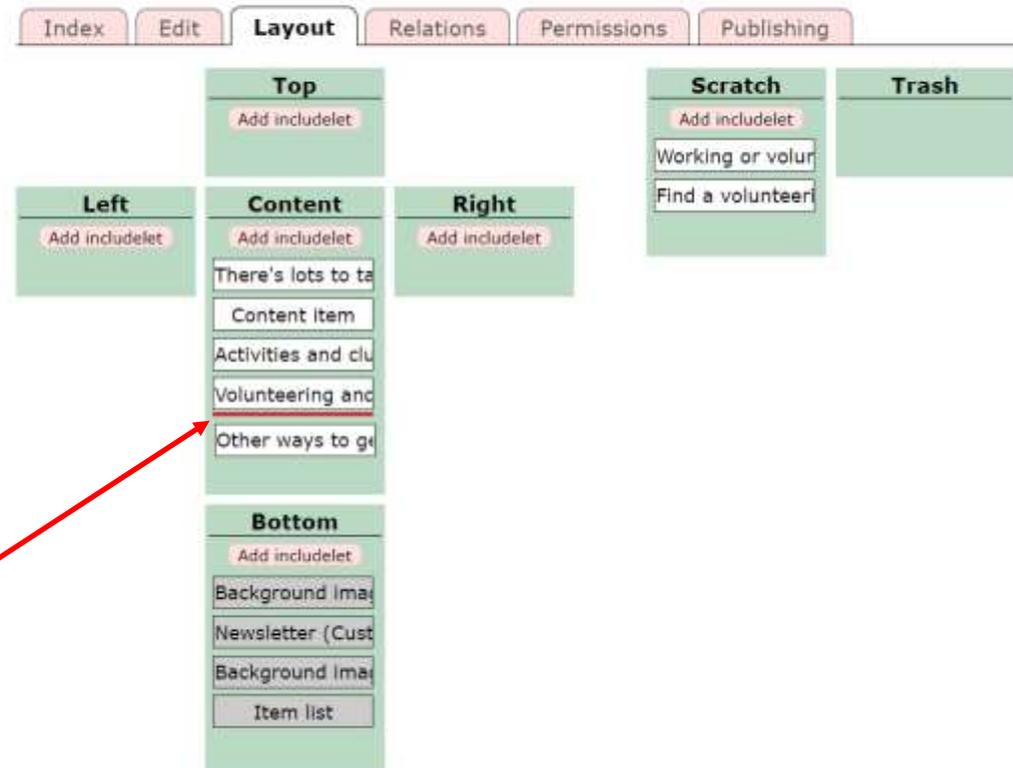
### Removing and moving includelets

The following options are available to you:

- Move it to Scratch (save)
- Move it to Trash (permanently delete)
- Move it to a different column
- Move it up or down the webpage

To use the options above:

1. Click to create a new revision
2. Click and hold on the includelet
3. Drag it to the right place
4. Release when a thick red line appears
5. Publish under the Publishing Tab

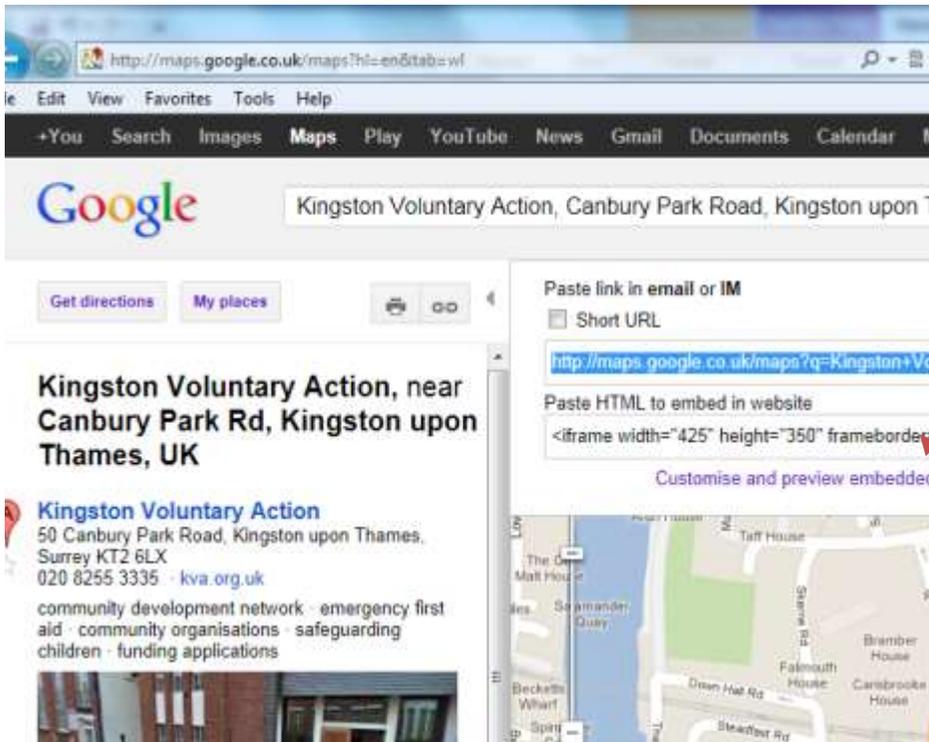


### Things to remember

You must Publish it in the Publishing tab (or in the Edit tab): saving will not make it live on the site as it is just a component of a page

Never remove the Content Item from the Content Column as this is the main body of your page (what you see in the Edit tab)

## Embedding content from external websites



### Embedding content into webpages

Websites such as Flickr, Facebook, Twitter, Google maps, Google calendars, You Tube, AudioBoo and many more allow you to embed content from their website onto your webpage.

Some require you to set up a free account so that you can upload your content on their website first.

They then make available some code for you to copy and paste (embed) into your webpage (as html)

Many allow you to customise or select how this content displays e.g. box size and border colour

### Embed content in your Voice website

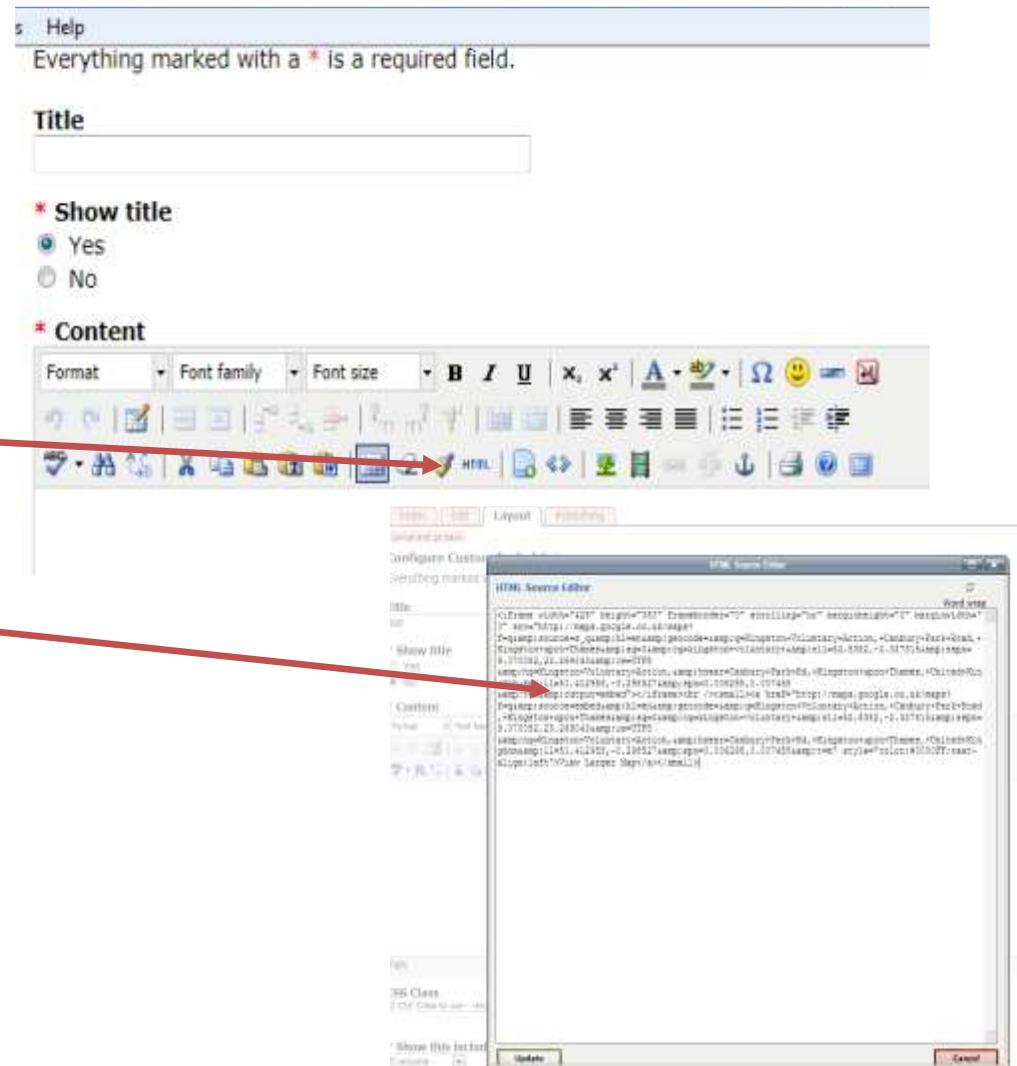
The Custom includelet is a useful includelet. In addition to adding text and images, it allows you to display a wide variety of information pulled from external websites (embedding the content using html codes that the external site can give you). The next page will show you how to do this.

# Embedding content using a custom includelet

## Embedding content using a Custom Includelet

1. Click Add Includelet
2. Select Custom
3. Open another tab and enter the URL of the website that you want to get information from e.g. You Tube, Google or Issuu
4. Copy the code the website gives you
5. In your custom includelet click on HTML
6. This will open a new screen
7. Paste your code here
8. Click on **Update**

You can also use the embed button  





Some includelets in Voice display information that you have added to applications that are enabled on your website. The Community Calendar includelet is linked to the Calendar application. The Latest News includelet is related to the News Story page type (not an application).

Example: Adding a Community Calendar includelet

You must have the calendar application enabled on your website and have added and published at least one event to do this:

1. Click Add Includelet
2. Community Calendar
3. Add the maximum number events you want to display
4. Give a time period / Days to display
5. How much of description to show
6. Inherit to subpages – No to just show on this page, Top or Bottom to place it on every page beneath this one in the Site Map
7. Save changes
8. Go to Publish Tab and click Publish to make live

At Croydon Mencap we do not use the Community Calendar or News includelet

A screenshot of a web application configuration interface. At the top, there's a pink header bar with the text 'Applications'. Below it, the page is titled 'Training Folder'. There are four tabs: 'Index', 'Edit', 'Layout', and 'Publishing', with 'Layout' being the active tab. A pink button labeled 'Cancel and go back' is visible. The main heading is 'Configure Community calendar Includelet', followed by the instruction 'Everything marked with a \* is a required field.' The configuration options include: 'Max # of events to display (default is 2)' with an empty input field; '\* # of days to display' with a dropdown menu set to '1 Day'; 'Truncate description' with a note '(i) Default is 200 characters' and an empty input field; 'CSS Class' with a note '(i) CSS Class to use - leave blank for default.' and an empty input field; and '\* Inherit this includelet to subpages' with a dropdown menu set to 'No'. A blue 'Save changes' button is at the bottom.

# Structuring using Filtered item list includelets



The Filtered Item List enables you to display information from multiple webpages in a grid or a list on another webpage. This makes use of things like related images, titles and teaser descriptions from each page.

When the visitor clicks on an image or the title e.g. Monday Night Social Club, they will be taken straight to that page

## Configure Filtered item list Includelet

Everything marked with a \* is a required field.

### \* Display mode

[i] Inline puts content directly on page, Panel puts it in a box

Panel ▾

### \* Display mode

[i] Inline puts content directly on page, Panel puts it in a box

Inline ▾

### \* Panel colour

[i] Standard colours defined in the Bootstrap theme

Default (usually grey) ▾

### Title

[i] Leave blank for no title

Leave blank if you don't want a title displaying on the page e.g. the one above does not use title because there is some text above that has the title Active Lives

### URL

[i] If set, makes the Title into a link to this URL

Ignore this

Display mode chooses whether the box has a coloured background. Use the Panel colour drop down to choose from a range of Croydon Mencap colours.

In-line has a white background and copies the styling of a normal webpage.

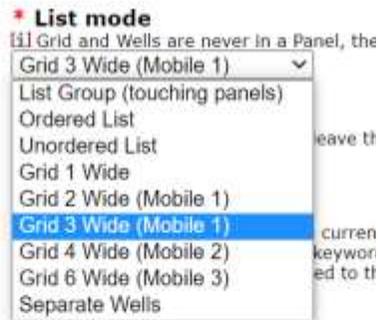
Your display mode will be mostly in-line. Use panel sparingly.

# The Filtered item list includelet

## \* List mode

[i] Grid and Wells are never in a Panel, the others take the **Display mode** setting

List Group (touching panels) ▾



List mode decides how the box will display the items



This is Grid 3 Wide (Mobile 1)

This shows List mode **'Separate Wells'**.

## Information



## Clubs @ Leslie Park



This shows List mode **'Grid 1 Wide'** for Clubs @ Leslie Park on the Clubs and activities page

Mobile 1 means that when someone is looking at your webpage on a phone or small tablet, one item will fill the full width of the screen e.g. Monday Night Social Club. The other items will drop down underneath. They would scroll down to see The Saturday Club and then Healthy Lives.

# The Filtered item list includelet



## Parent items

[i] Select items below here. If you leave this blank it uses the current page.

Select item Clear

**Latest stories and news**

<p>Croydon Mencap has appointed a new Chief Executive Alan Avis is retiring</p> <p>Read more &gt;</p>	<p>Jade on The One Show - One Big Thank You Jade was nominated for her volunteering and fundraising</p> <p>Read more &gt;</p>	<p>Parents in Partnership Parents in Partnership joined Croydon Mencap and became BP @ Croydon Mencap</p> <p>Read more &gt;</p>
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## \* Items to select

[i] Children selects items below the current item

Keyword selects items which have keywords in common with the current item

Related selects items that are related to the current item (see Relations tab)

Children ▾

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[i] Children selects items below the current item

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Children ▾  
Children  
Keywords  
Related ▾

## Content type

-- Any type -- ▾

## Search string

[i] Optional search string to filter results

Ignore this

When you Select item, all other pages that you wish to display must sit underneath it in your site map. For example if you want to show a grid of latest stories and news you must choose Stories and news as the Parent item.

If pages are in completely different sections of the site then hyou will probably need your home page as the Parent item.

Children means any page that exists under the Parent page

You can also choose a specific tag, Keywords, e.g. 'Vacancies'.

**Croydon Mencap's Filtered Item Lists do not need keywords for most filtered item lists. They are used for Team pages. Insert these in your style guide.**

Keywords are case sensitive.

To use Related, you must first go the Relations tabs of the pages to choose which other pages they are related to.

Choose what Content type of pages you want to show content from e.g. webpage, news story. You can leave as Any type under Content type

Choose what type of pages you want to show content from e.g. webpage, news story. You can leave as Any type under Content type

# A note on Search keywords



**\* Items to Select**  
[i] Children selects items below the current item  
Keyword selects items which have keywords in common with the current item  
Related selects items that are related to the current item (see Relations tab)

Children  
Children  
**Keywords**  
Related

**Search keywords**  
[i] Items which have any of these keywords. Separate with commas.

**\* Include in navigation menu?**  
[i] If you want to include this item in the left hand navigation, click 'yes'.  
 Yes  
 No

**Keywords**  
[i] Not visible to visitors, used by search engines to rank your page. Separate with commas.  
Portland House

**Description**  
[i] Not visible to visitors, used by search engines to rank your page.

**\* Send a notification to members when this page is published?**  
 Yes  
 No

Save Save and Publish

If you have chosen Keywords, scroll down to complete the Search keywords box

Search keywords. As it says here Items (webpages) which have any of the keywords you write in this box will be filtered to show in the grid or list. You must separate them by commas.

One keyword can consist multiple words e.g. Portland House

To filter webpages by keywords, they must exist on those pages.

Keywords are entered on the individual webpages at the bottom of the Edit tab.

Keywords are case sensitive. In this example, Alan, Abigail and Carole all have an individual staff page. On each page is the Keyword: Portland House

## Our team

There are contact details for our staff members on this page.

### Portland House



**Alan Avis**  
Chief Executive  
alan@craydonmencap.org.uk



**Abigail White**  
Operations Manager  
abigail@craydonmencap.org.uk



**Carole Letchford**  
Finance Officer  
carole@craydonmencap.org.uk

## The Filtered item list includelet

**Publish start date**  
▼ ▼

**Publish end date**  
▼ ▼

**Publish min age**  
-- ▼

**Publish max age**  
-- ▼

### \* Item display mode

[i] How to display items in the list

- Short Title
- Full Title
- Teaser
- Related Image
- Full

Set a Publish start date for your grid/list to display - useful if you had a long list of news stories and you only wanted to show the last three months worth of pages.

Item display mode: this is about how the text displays with or without an image.

Short title: displays the menu title

Full title: displays the long title at the top of your webpage

Teaser: displays the extra text description that is not normally visible on the webpage itself along with the full title

Related image: displays only an image (no text)

Full: displays everything on each individual page in a list or grid of pages. Only use this if the information on the individual pages is short.

### Extra display options

[i] Extra options for some display modes

- Author
- Keywords
- Related Image
- Publish Date (header)
- Publish Time & Date (footer)
- Hide Read More Link

You have some Extra display options available.

You must tick Related image if you want your grid or list of webpages to show an image. The images must be added to the individual webpages in the Relations tab.



Team Page

Index Edit Layout **Relations** Publishing

Add related item Add related image Reorder Related Items

**Related Items**

Content Type	Title	Edit	Remove
2 Image	Alan and Katherine		

**Relations From Other Items**

No inbound relationships

## The Filtered item list includelet

### \* Related image mode

Thumbnail

#### \* Related image i

Thumbnail  
Thumbnail  
Medium Size  
Full Size  
Original

Related image mode: you have a choice of displaying related images at different sizes. Most of Croydon Mencap's filtered item lists show the full image or medium sized.

### Related image aspect ratio

Natural (as source)

#### Related image aspect

Natural (as source)  
Natural (as source)  
Square  
4x3 (postcard)  
16x9 (widescreen)  
2x1 (wider)  
3x1 (very wide)

Related image aspect ratio: you have a choice of what shape your images will be displayed as.

Most of Croydon Mencap's filtered item lists use 16x9 (widescreen).

Do not use Natural (as source). This could lead to inconsistencies on your website if photos are all different shapes and sizes.

If you have used 16x9 and one of the images is not displaying correctly or filling the space it is likely that the image is too small (not of a high enough quality).

### \* Sort order

Fixed Order

#### \* Sort order

Fixed Order  
Fixed Order  
Title  
Newest First  
Oldest First  
Random

Sort order: decides the chronology or order of the webpages you are displaying

Fixed order: the order the webpages appear in the navigation

Title: alphabetical

Newest first: the most recently published item is displayed first (e.g. Stories and news)

Oldest first: the least recently published item is displayed first (not used anywhere)

Random: it doesn't matter about the order

# The Filtered item list includelet



## \* Present links to allow the user to sort results

- Yes
- No

## Limit

Limit results, 0 for unlimited.

## \* Paginate

- Yes
- No

## Tree depth

1 for immediate children only, 2 for children and their children, etc. 0 for unlimited.

## CSS class

CSS Class to use - leave blank for default.

Ignore this

## \* Inherit this includelet to subpages

- No
- Top
- Bottom
- Top Only (not current page)
- Bottom Only (not current page)
- No

Save changes

Present links: Only useful if there are lots of webpages included!

Limit: set the limit if you have a grids that you want to keep nicely displayed e.g. set it at 3 for a grid of three or 6 for a grid of six.

Paginate: allows a visitor to sort alphabetically or by date if it displays lot of pages e.g. news items here <https://superhighways.org.uk/latest/>

Tree depth: set this to 1 in most cases. This prevents stray pages in the site map below your chosen pages from displaying. E.g. On the support page you wouldn't want a page that had been created underneath Adults with a learning disability to appear in this grid.

Inherit this includelet to subpages:

Only if you want it to be duplicated on the pages that sit underneath the Parent item

### Support



Don't forget to Save changes. You can preview or go to the Edit tab or Publishing tab to publish on your live site

## Item List includelet

The Item List includelet helps you to create a grid or list of different types of content e.g. text and images that are not linked to pages.

You can also select individual webpages that are not children, related or filtered by keywords. For example, if you wanted to have a grid of three pages from anywhere on your site you may choose to use the Item List rather than a keyword.

Many of the choices available are the same as a Filtered Item List.

**Title**  
(i) Leave blank for no title

**URL**  
(i) If set, makes the Title into a link to this URL

**Description**  
(i) Leave blank for no description

**Graphic**  
Ham and cheese sandwich

Title: Complete if you want a normal sized title

### Testing



You can usually leave this blank

Graphic: You probably won't need this. It may be useful if you were just showing one item.

# Item List includelet for text and images

How to create a grid or list of text and / or images only:

### \* List mode

*[i]* Grid and Wells are never in a Panel, the others take the **Display mode** setting

Grid 2 Wide (Mobile 1)

List mode: choose how the items will display, depending on the number of items to display and the amount of information e.g. text

### Items to display

*[i]* Add Page to add a page from your site. If Related Image is enabled in *Extra display options* then the first image related to the selected page will be displayed.

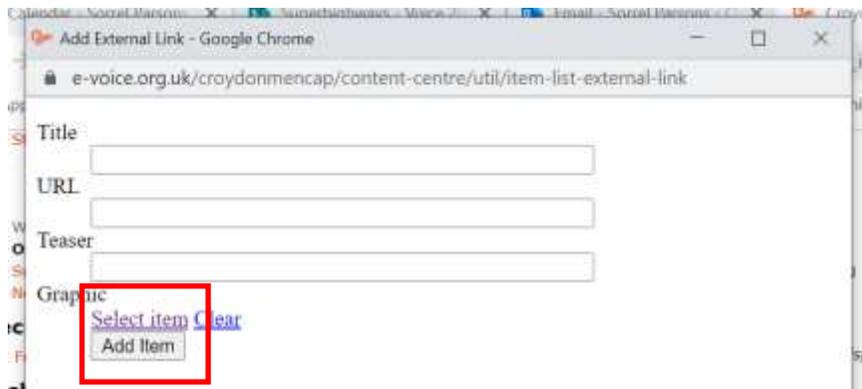
Add Other to add text/images/links.

Type Title

Add Page

Add Other

Add other: add a graphic and / or text. You can add multiple items and give it a title and teaser



If you are adding graphics you must click on Select item

Then Add Item to save whatever information you have added

You can then move items up and down to put them in the correct order. Here we have added two random images side by side



Finally, you can make some other choices about styling before Saving Changes

Everything marked with a \* is a required field.

**\* Display mode**

*Inline* puts content directly on page, *Panel* puts it in a box

Panel ▾

**\* Panel colour**

Standard colours defined in the Bootstrap theme

Default (usually grey) ▾

**Title**

Leave blank for no title

**Description**

Leave blank for no description

**\* YouTube video id or URL**

**Aspect ratio**

Natural (as source) ▾

**CSS class**

CSS Class to use - leave blank if

**\* Inherit this includelet t**

No

Save changes

**Aspect ratio**

Natural (as source) ▾  
Natural (as source)  
Square  
4x3 (postcard)  
16x9 (widescreen)  
2x1 (wider)  
3x1 (very wide)  
NO

Display mode: choose a Panel to surround your video with a coloured box. You can also choose a Panel colour

Use Inline to have a clear (white) background so that it looks like it's just on the white webpage.

**\* Display mode**

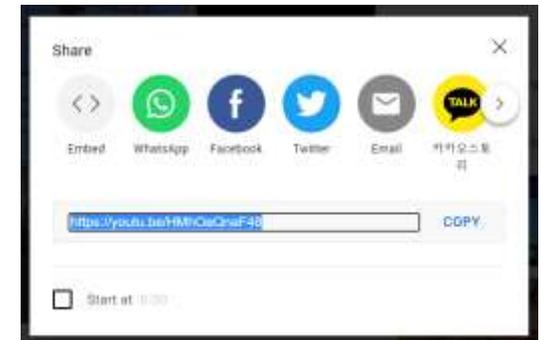
*Inline* puts content directly on page, *Panel* puts it in a box

Inline ▾

Title: leave blank for no large title above your video

Description: if you want to put some text before the video

**YouTube video id or URL:** Copy and paste the YouTube link into the box. You do not need an embed code. Just the link e.g. <https://youtu.be/HMhOaQnaF48>



Finally, you can make some other choices about the Aspect Ratio before Saving Changes.

Permissions can be set at various levels:

- Whole site – set under Users and Permissions Tab
- Top Level Pages and Folders – set under Permissions Tab when editing that page
- Applications – in the Applications Admin area

Levels of Permission:

- Admin – full rights
- Edit – can add information to page and applications
- Read – can see the content, but cannot contribute

Users

- Registered Users - anyone registered with the Voice system (not specifically your site)
- The Public – anyone visiting the site
- Administrators – full access to the whole system, including making others administrators
- Members – people who register with your site to be notified of updates or contribute to discussions

## Members

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- Private Area Members – people specifically invited to have access to the Private Area
- Named People – members of your site with permissions for specific pages/applications

### Users—Members

- Go to Users & Permissions – Members
- Members awaiting approval will be on left
- You can Approve, Deny or just ignore these requests
- People may register for updates from certain applications e.g. Noticeboard, FAQ
- They may just be interested in your organisation
- They may want to take part in polls, surveys and discussions
- **Approving them won't automatically give them any special privileges unless you've set this up**
- Recommend approving all members as you can email them directly from the system under Users & Permissions
- Set it to automatically email new members – Welcome Email
- Email Members or Administrators e.g. with updates on your work
- You can invite people to join by entering their email address
- If they are already registered with Voice they will appear in the list of members automatically, otherwise they will receive an email asking them to register

# Administrators



Making someone an administrator of your website

You can make any member an administrator by clicking Make Administrator button by their name

The screenshot shows a web interface for managing users. At the top, there are navigation tabs: 'ent Management', 'Look & Feel', 'Users & Permissions' (which is selected), 'Reports', and 'Help'. Below these are sub-tabs: 'Policy', 'Permissions & Sharing', and 'Email'. The main section is titled 'Members'. It includes a search box with the label 'Search', an 'OK' button, and a 'Clear' button. Below the search is a table with the following columns: 'Name', 'User Info', 'Role', 'State', and 'Action'. The 'Name' column is redacted with a large red box containing the word 'Confidential'. The 'Role' column lists 'member' and 'admin'. The 'State' column lists 'approved'. The 'Action' column contains buttons for 'Remove' and 'Make administrator' (for members) or 'Revoke administration' (for admins). At the bottom of the table area, there is a link that says 'Invite others to join >'. The 'User Info' column is also redacted with a red box.

You can revoke Administrator rights and remove them entirely – this is why it is very important not to share one username/password between many people.

Every member or administrator should have their own password.