Website Design Guide

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Website Design Introduction

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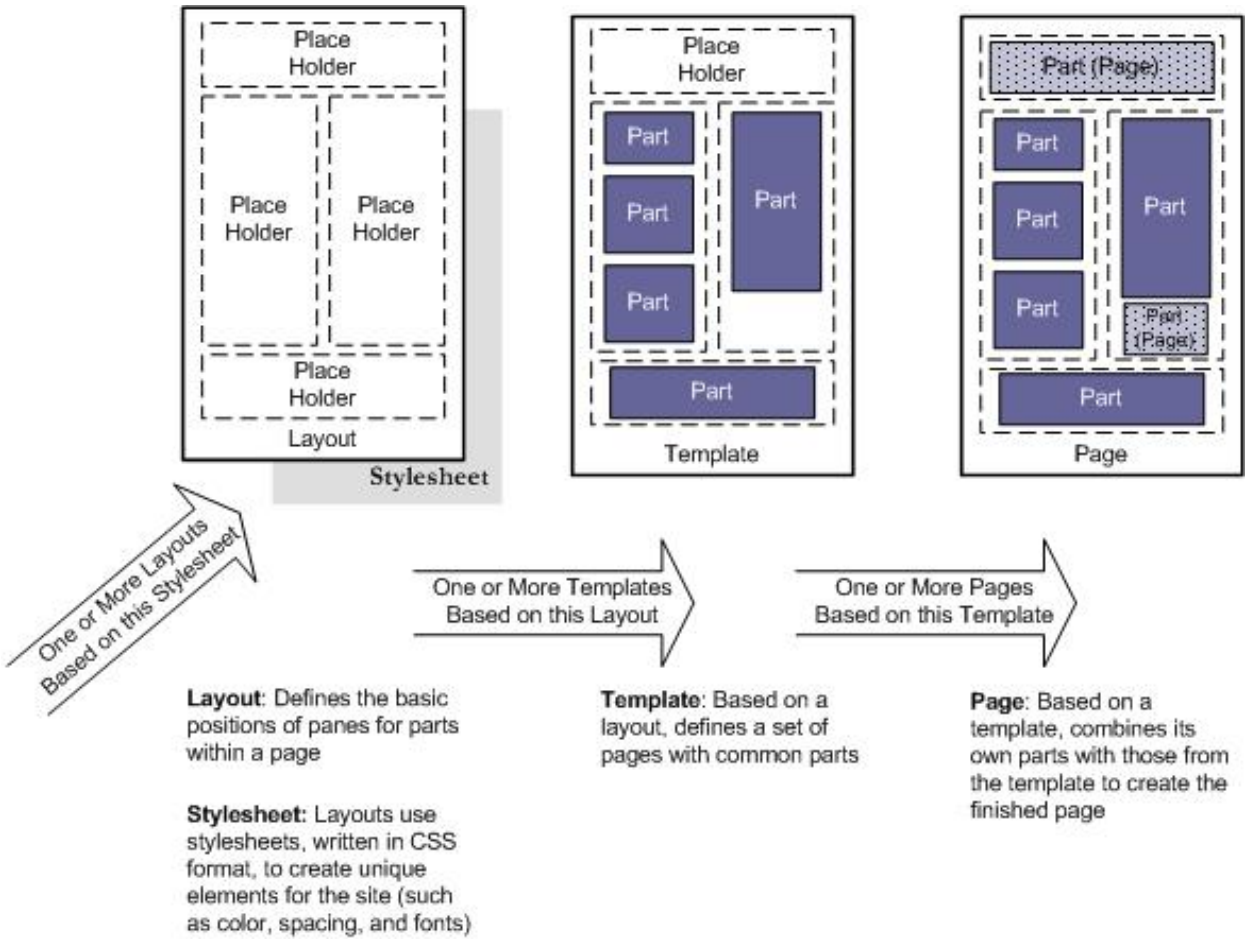
You create web pages in *Site explorer*. To modify web pages, you can design page layout, create and use templates, and add and remove part type information and images. Most likely, users who create web pages are site administrators with Supervisor rights. This section contains information about how to create and edit the parts for your web pages in *Site explorer*.

Website Overview

The diagram depicts how to use the program to construct a web page from start to finish. *Stylesheets*, *Layouts*, and templates sections are for Administrator use only. Most likely, you do not need to create layouts and templates for a new web page; you use existing ones. If you have edit rights, you can create and update web pages and part types. The Administrator must assign these security rights to user roles.

For information about security, see the *Users & Security Guide*.



Site explorer contains multiple sections. Each plays a major part when you construct and design a web page.

Pages & templates — You can store each web page and template individually in *Pages & templates* with quick access to each page. In Pages & templates, you can create, edit, and delete pages for your website and view the URL path for each page. To create a web page, you must add content parts from *Parts* to your page in *Pages & templates*.

Note: Templates are the framework for your website and establish consistency throughout your site. Administrators can create, edit, and delete templates in *Pages & templates*. When you create web pages, you can start with an existing template.

Image library — Use *Image library* to add, delete, and approve images for your website. In addition, view a preview of an image to make sure it appears on the screen correctly. Images must be saved as a *.bmp, *.gif, *.jpg or *.jpeg file. An image does not appear on your website until you add it to a web page.

Parts — Use *Parts* to create, edit, and delete reusable content information, such as a user login and user profile form. A content part does not appear on your website until you add it to a web page. To create a web page, you must add parts from *Parts* to your page in *Pages & templates*. You can also assign security rights to roles for each content part in *Parts*.

For more information about *Parts*, see the *Parts Guide*.

Note: With some parts and layouts, you use a powerful HTML editor to format and lay out several features, such as email, newsletters, and content on web pages. With the HTML editor, you can update content easily and safely while you maintain control over the website design and content.

Layouts — Administrators use *Layouts* to design and place panes on your web page. In *Pages & templates*, these panes contain parts and images. To customize layouts, insert rows, add bullets, and adjust font size and style.

Style sheets — Administrators use style sheets to create unique elements such as colors, font types and size, and spacing for your website. Style sheets, written in Cascading Style Sheet (CSS) format, are easier to use than other methods such as HTML. Unless you specify a custom style sheet, your website uses the program's default style sheets. In *Style sheets*, you can create custom style sheets that override a default style.

Files - Use *Files* to add, delete, and approve files for your website. *Files* also provides you with access to all Documents part files in one location.

Website Accessibility

For web and accessibility standards, you can design a website that conforms to guidelines defined by the World Wide Web Consortium (W3C) and its Web Accessibility Initiative (WAI). The W3C created the WAI to explain how to provide web content to people with disabilities. The WAI guidelines are intended for use by all web content developers such as page authors and website designers, and for developers of authoring tools. A select number of parts meet strict WAI level AA compliance guidelines by way of automated validation, while others meet WAI level A compliance. For more information about the creation or design of a WAI compliant website, contact Blackbaud Support.

Pages & Templates

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In *Pages & templates*, you create, edit, and delete web pages and templates that contain reusable parts. To fit the needs of your website, you can customize pages and templates. When you create or edit a page on the page design screen, you can add or create parts in editable panes inherited from the template. You can edit and remove parts on the web page.

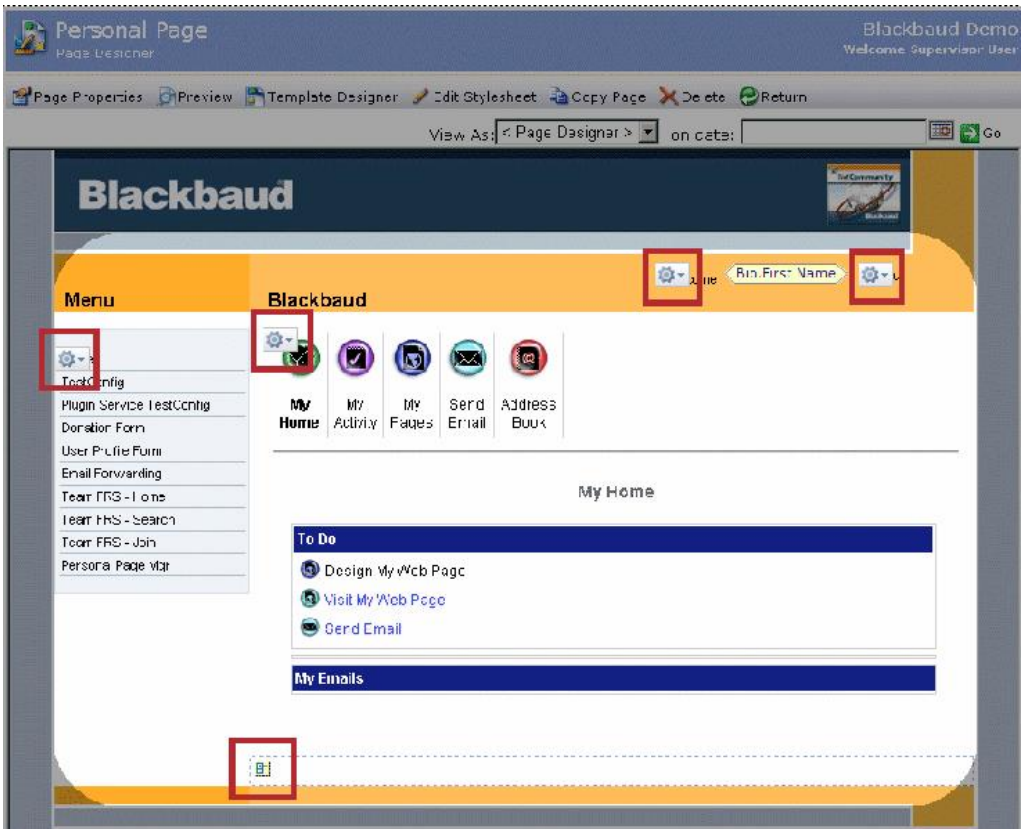
Think of *Pages & templates* as the shell for your website. The program stores pages and templates here for you to access each piece. Although you can manage parts in *Parts*, we recommend that you create and update parts in *Pages & templates*. This allows you to preview the page and see how parts fit together.

You can assign security rights to user roles for web pages and templates. You use security rights to protect web pages and templates that are secure, complicated in design, or appear repeatedly on your website.

When you host multiple sites, you can create pages and templates for individual sites. To do this, log in to the site and create the page or template. For more information, see the *Administration Guide*.

Buttons in Pages & Templates

In *Pages & templates*, the design screen allows you to design pages and templates. You use buttons to edit or create parts and perform other tasks.



For information about the buttons on the design screen in *Pages & templates*, review the following table. For information about how to design pages or templates, see Design a web page on page 9 and Design a template on page 14.

Button	Function	Description
	Template part or **Page part**	When you design a page and a part is on the template, the **Template part** button appears. Click the button to access options such as **Insert part**, **New part**, and **Edit Page Template**. If a part is on the page, the **Page part** button appears. In addition to the **Template part** options, this button includes **Edit**, **Cut**, and **Paste** options.
	pane	The design screen contains **pane** buttons to add or create parts. Panes are content placeholders that default from the layout. Click the button to access options such as **Insert part**, **New part**, and **Show/Hide Part Markers**. After you insert a part, the **Template pane** or **Page part** button replaces the **pane** button.
	Template part or **Page part** for a part in the approval process	If this button appears, the part is in the content approval workflow. When you click the button, the part status and a menu appear. The part status, such as “Draft,” appears at the top of the menu. The menu includes options such as **Set Approval Status**, **Publish Now**, **Reject Changes**, **Insert part**, and **New part**. The menu items vary according to security rights and roles. If you cannot view a menu item, check with your system supervisor.
	Edit part	The **Edit part** button appears for parts within a Targeted Content part. To edit a part, click the button. To edit the Targeted Content part, click the **Template part** or **Page part** button. In the menu, select **Edit**. For

Button	Function	Description
		information about the Targeted Content part, see the *Parts Guide*.
	Enable navigation	For menu parts, if you want to open the corresponding page from the page design screen, click **Enable navigation**.

Pages

To create a web page, you select a template and add parts to the page. The page design screen contains editable panes based on the template where you can add or create parts. You can also edit or remove parts. Although you can manage parts in *Parts*, we recommend that you create and update parts from the page in *Pages & templates*. This allows you to preview the page and see how parts fit together.

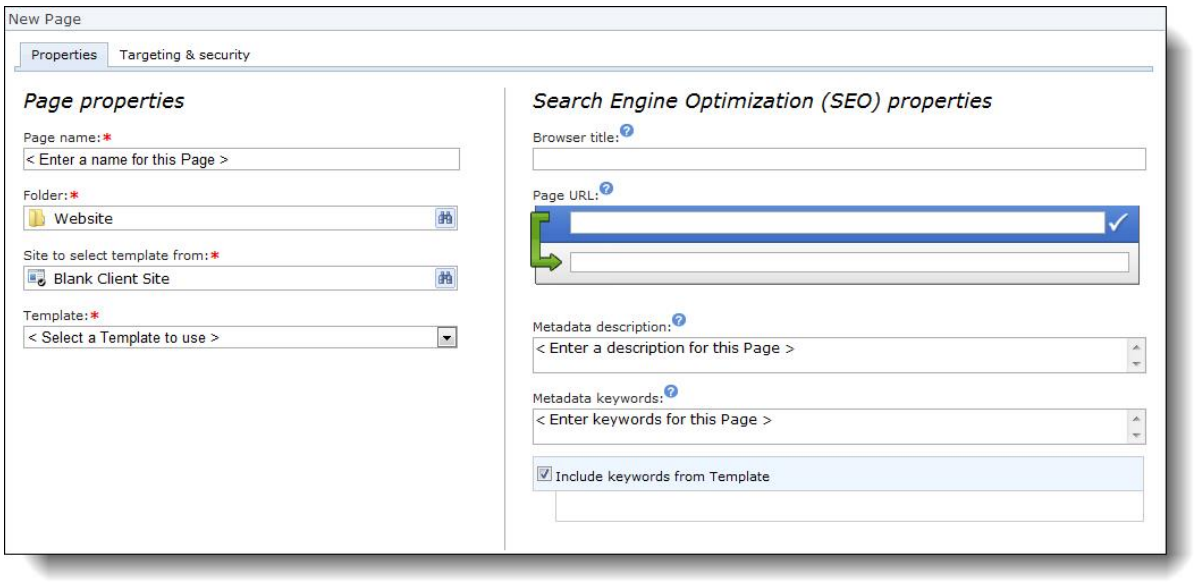
You can assign security rights to user roles for each web page. You use security rights to protect web pages that are secure, complicated in design, or appear repeatedly on your website. For more information about security, see the *Users & Security Guide*.

When you create a page and include one of these parts, the second part is not available for the page. If an existing page includes both parts, a warning message informs you that the parts are incompatible.

▸ Create a web page

Show Me: Watch how to create a page and define page properties.

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.
2. Click **New page**. The New Page screen appears.



Note: You can also create a web page based on an existing web page. In *Pages & templates*, select a page in the grid and click **Click here to copy this page**. The Copy page screen appears. The original page values default in the **Page name**, **Browser title**, and **Page URL** fields with "(Copy)" appended. You can keep or edit the information, and then click **Save**.

3. In the **Page name** field, enter a name to identify the web page in *Pages & templates*. The page name does not appear on your website.

The page name defaults in the **Browser title** field. You can leave the page name or enter a different name to appear on the web page title bar. When you edit page settings in *Sites & settings*, you select whether to display this browser title and whether to include your organization name and site name. For more information about web page titles in *Sites & settings* see the *Administration Guide*.

4. In the **Folder** field, select a folder for the page. You can use folders to group related web pages. By default, the program stores pages in the root Website folder. You cannot edit this folder.
5. In the **Site to select template from** field, select a site to narrow the list of templates you can use for the page. You can select a template from another site even though the page is for the site you are currently on. If you do not host multiple websites, your single site defaults in the field. For information about sites, see the *Administration Guide*.
6. In the **Template** field, select a template. For information about how to create a template, see Templates on page 11.
7. In the **Page URL** field, the program suggests a URL for the new page based on the page name or browser title you enter and the folder you select to store the page in. For example, if you enter "2014 Annual Fund" for the page name and select to store the page in the Donation folder, the program suggests to use the URL "Donation/2014-Annual-Fund". You can leave the suggested URL or enter your own unique URL for the page. If the URL exists for another page, the field displays a warning to indicate you cannot use it.

Tip: These page URLs enhance search engine optimization (SEO) for your website by including keywords in the URLs and links that search engines use to index content.

The program does not include the root Website folder in the URL. The full URL appears just below the **Page URL** field. You can select the full URL to copy it, but you cannot change it.

8. In the **Metadata description** field, enter a description to embed in the page's HTML coding. When search engines include the page in search results, the description appears with a link to the page.
9. In the **Metadata keywords** field, enter keywords for search engines to include in online searches. For example, you can use keywords to describe pages that have little text or to include terms that are not on the page but are likely search criteria. Separate keywords with commas.

   The metadata fields are each limited to 255 characters. In general, search engines do not examine more than 255 characters of metadata.

Note: The page's HTML coding also includes metadata for the last date the page was modified. This date reflects the most recent change to the page or to a part on the page. However, it does not include changes to parts stored within parts on the page. For example, a Targeted Content part can contain multiple parts to display content according to user roles. If a system supervisor modifies these parts but not the Targeted Content part itself, the change is not reflected in the metadata.

10. To apply metadata keywords from the template, select **Include keywords from Template**.

Tip: Each keyword appears only once in a web page's META tag. If you enter duplicate keywords or inherit duplicate keywords from the template, they only appear once in the HTML coding.

11. To assign security rights for the page, select the Targeting & security tab. For each user role, you can manage rights to view, edit, delete, and change security for the page.

    For information about security and user roles, see the *Users & Security Guide*.

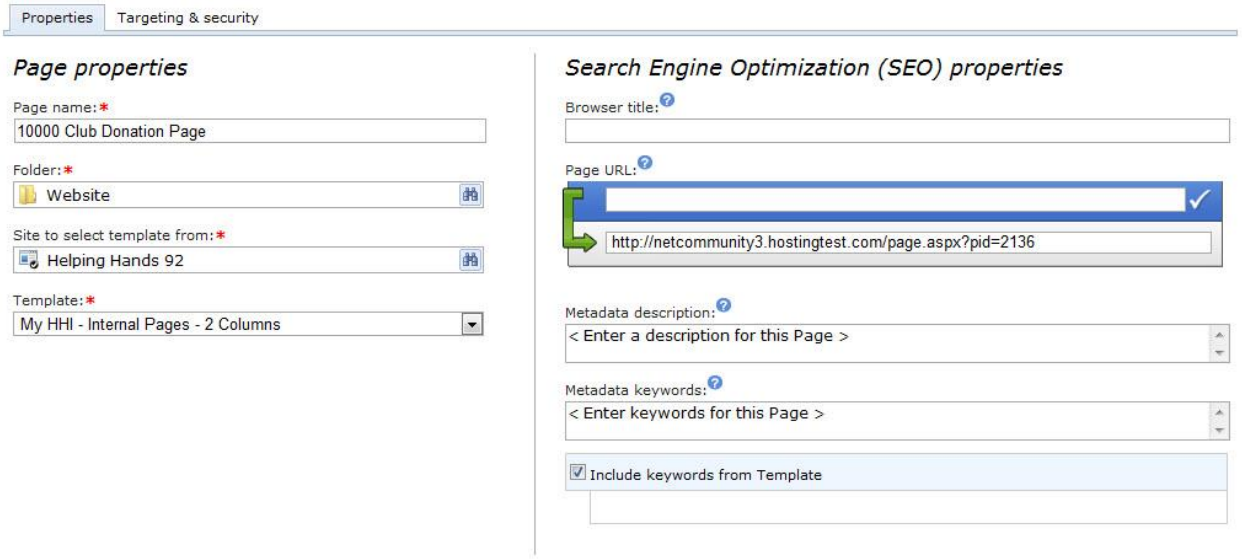
12. Click **Next**. The page design screen appears. For information about how to design a page, see Design a web page on page 9.

Edit web page properties

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.

   To view the properties for a web page, select it in the grid. Below the grid, select the Properties tab. This tab displays information such as whether the page uses Secure Sockets Layer authentication and the number of page hits.

2. To edit a page's properties, select it and click **Click here to view/edit this page's properties**. The Page properties screen appears.



3. Make changes as necessary. The options on the Properties tab and Targeting & Security tab are the same as on the New Page screen. For a detailed explanation, see Create a web page on page 7.

4. Click **Save**. You return to *Pages & templates*.

Design a web page

To design a web page, you add parts to the page. The page design screen contains editable panes where you can add, edit, or remove parts. Although you can manage parts in *Parts*, we recommend that you create and update parts in *Pages & templates*. This allows you to preview the page and see how the parts fit together.

Show Me: Watch how to add content to a page.

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.
2. Select a page and click **Click here to edit this page**. The page design screen appears.
3. To add a part to an empty pane, click the **pane** button. If a part exists in the pane, click the **Page part** button. A menu appears. If the **Page part** button displays an hourglass, the part is in the content approval workflow.

   For information about the menu items, see Buttons in Pages & Templates on page 5.

Tip: Depending on the template, the page design screen may contain multiple panes for parts. A **Template part** button appears with parts from the template.

- To add the page to a menu, select **Add page to menu** on a menu part. The Menu part opens and

defaults to the Design tab. In the box on the left, select where you want the page to appear in the menu. To add the page to the location, select **Insert this page** and enter menu item properties for the page. For more information about menu item properties, see the *Parts Guide*.

Tip: The **Add page to menu** option appears for menu parts on a page and from a template. When you add a page to a menu part for a template, it is important to remember the menu changes for all pages that use that template.

- To edit a part, select **Edit**. The Edit Part screen appears.

  When you copy a page and then edit a part that is shared across multiple pages or websites, a message appears to ask if you want to update the part for all pages and websites, or insert a new copy of the part on that page.

  When you edit a shared part from the page design screen, you can click **create a new copy of the part** at the top of the existing part to copy the part for that page. The copied part replaces the previous part on the page so your changes do not affect other pages or websites that share the original part.

  For information about parts, see the *Parts Guide*.

- To remove a part, select **Cut**. The program saves the part to the clipboard. To place it in another pane, select **Paste**.

Warning: You can cut and paste parts from one pane to another, but if your session times out, the program clears the clipboard. When you reopen the program, you can no longer paste the part.

- To add a part, select **Insert part**. The Select a Part screen appears. You can search for parts by folder, part type, name, or site.
- To create a part, select **New part**. The New Part screen appears.
- To create a new Formatted Text and Images part, select **Add Formatted Text & Images**. For more information about this part, see the *Parts Guide*.
- To move a part with a pane, select **Move up** or **Move down**.
- *Administrator Step*: To edit the template, select **Edit page template**.
- *Administrator Step*: To edit the style sheet, select **Edit style sheet**.
- To hide **Page part** buttons on the page design screen, select **Show/hide part markers**.
- To enable links in a Menu part, click **Enable navigation**. This allows you to click links in the menu and access the page design screen to those pages.

Note: To view how the page appears to different website users, select a role in the **View as** field and click **View**. You can preview the page as visitors see it on desktop browsers or mobile devices. To display the page as it appeared on a particular date, enter the date in the **on date** field and click **View**.

4. *Administrator Step*: To edit the page's properties, click **Page properties**.
5. *Administrator Step*: To edit the template, click **Template designer**.

Warning: When you edit a template, you change it for all the web pages that use it. To create a unique template for a web page, you can copy an existing template.

6. *Administrator Step*: To edit the page's layout or style sheets, click **Edit layouts & CSS**. You can access the layouts and style sheets for desktop browsers and for mobile devices. Style sheets are listed in the

cascading hierarchy that you define in Style sheets. To see and manage your style sheets, select **Manage style sheets**.

Warning: When you edit a style sheet, you change it for all layouts, templates, and web pages that use it. For more information about style sheets, see Style Sheets on page 25.

7. To delete the page, click **Delete**. You can restore it from the Deleted folder on the Folders tab.
8. The program automatically saves your changes. To return to *Pages & templates*, click **Return**.

Templates

Templates are the framework for your website. You create and design templates to provide consistent website components from one web page to another. To create a web page that is different from the rest of your website, you most likely will create a special template. For example, your organization may want to add an online donor recognition page with a virtual wall similar to your newsletters. To create a page that is different from existing pages, you must start from the beginning with a new template. In *Pages & templates*, the design of the template becomes the main component for the donor recognition page. To save time and effort during the template design, you can add pieces from other areas of the program such as *Layouts*, *Parts*, and *Image library*.

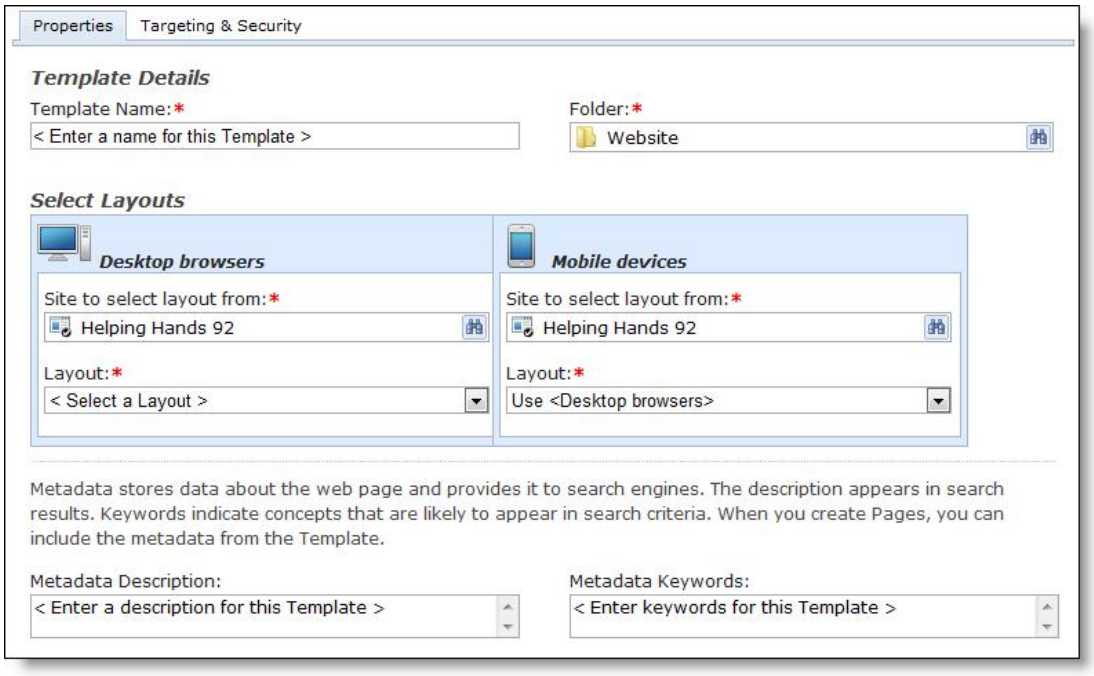
When you create a template and include one of these parts, the second part is not available for the template. If an existing template includes both parts, a warning message informs you that the parts are incompatible.

Warning: We strongly recommend that you assign supervisor rights for this section to only a select group of users. General users should not access templates. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program should perform tasks in this section.

Create a template

After you create a template, you can use it for multiple pages.

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.
2. Click **New template**. The New Template screen appears.



Note: You can also create a template based on an existing template. In *Pages & templates*, select a page in the grid and click **Click here to copy this template**. The Copy template screen appears. In the **New Template name** field, enter a name and click **Save**.

3. In the **Template Name** field, enter a name to identify the template in *Pages & templates*. This name is for internal use and does not appear on the website.
4. In the **Folder** field, select a folder for the template. You can use folders to group templates. By default, the program stores templates in the root Website folder. You cannot edit this folder.
5. Under **Select Layouts**, select layouts for the template. You can select different layouts for desktop browsers and mobile devices.
    a. In the **Site to select layout from** fields, select a site to narrow the list of layouts you can use for the template. You can select a layout from another site even though the template is for the site you are currently on. If you do not host multiple websites, your single site defaults in the field.

       For information about sites, see the *Administration Guide*.

    b. In the **Layout** fields, select a layout for the template.

Note: The layout is crucial to your website's appearance. It determines the design and placement of elements on templates. The layout includes where to place content, graphics, and navigation buttons. For information about how to create layouts, see Layouts on page 19.

6. In the **Metadata Description** field, enter a description to embed in the template's HTML coding. When a search engine includes a page with the template in search results, the description appears with the link to the page.
7. In the **Metadata Keywords** field, enter keywords for search engines to include in online searches. For example, you can use keywords to describe pages that have little text or to include terms that are not on the page but are likely search criteria. Separate the keywords with commas. Each keyword appears only once in a web page's META tag, so if a web page inherits a duplicate keyword from the template, it only appears once in the HTML coding.

Note: The metadata fields only allow 255 characters. In general, search engines do not examine more than 255 characters of metadata.

Note: The template's HTML coding also includes metadata for the last date the template was modified. This date reflects the most recent change to the template or to a part on the template. However, it does not include changes to parts that are stored within parts on the template. For example, a Targeted Content part can contain multiple parts to display content based on user roles. If a supervisor modifies these parts but not the Targeted Content part itself, the changes are not reflected in the metadata.

8. To assign security rights for the template, select the Targeting & Security tab. For each user role, you can manage rights to view, edit, delete, and change security for the template.

   For information about security and user roles, see the *Users & Security Guide*.

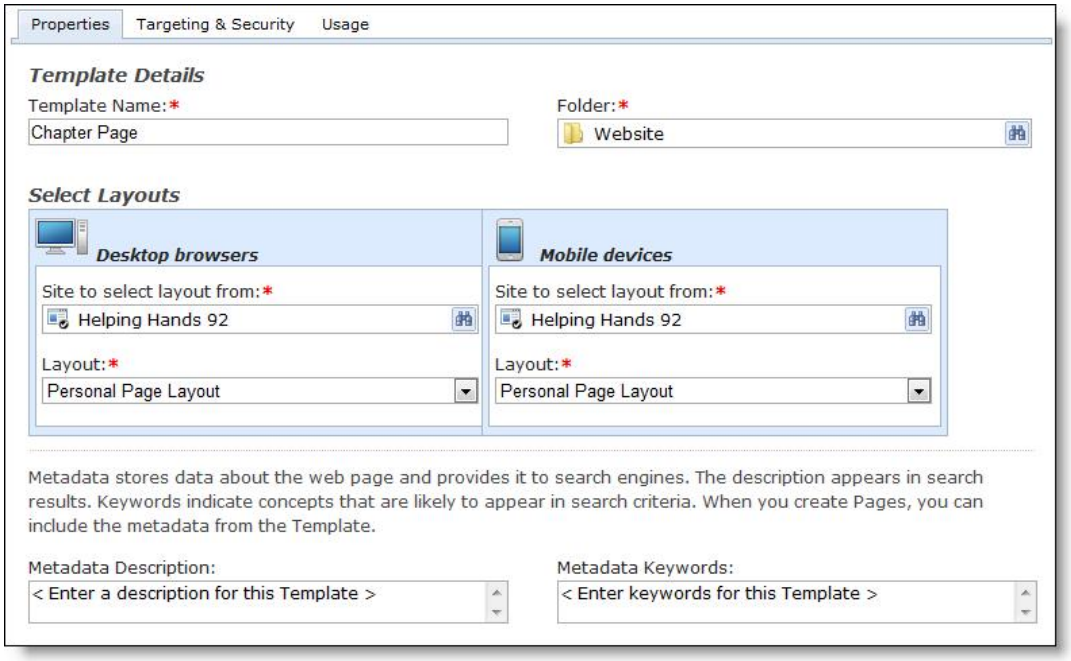
9. Click **Next**. The template design screen appears. For information about how to design a template, see Design a template on page 14.

Edit template properties

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.

Warning: We strongly recommend that you limit supervisor rights for this section to a select group of users. General users should not access templates. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in this section.

2. To view the properties for a template, select it in the *Pages & templates* gallery and select the Properties tab below the gallery. This tab includes information such as whether the template uses Secure Sockets Layer authentication and the number of page hits.
3. To edit a template's properties, select it and click **Click here to view/edit this template's properties**. The Template properties screen appears.



4. Make changes as necessary. The options on the Properties tab and Targeting & Security tab are the same as on the New Template screen. For a detailed explanation, see Create a template on page 11.

5. On the Usage tab, you can view the web pages that use the template.
6. Click **Save**. You return to *Pages & templates*.

Design a template

Templates provide the framework for the pages on your website. Because of the time, research, and detail involved to design templates, we recommend that you base new pages on existing templates rather than creating new templates. However, you can edit a template to fit the needs of a web page, or you can copy a template to make adjustments as necessary.

1. From *Site explorer*, click **Pages & templates**. *Pages & templates* appears.

Warning: We strongly recommend that you limit supervisor rights for this section to a select group of users. General users should not access templates. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in this section.

2. Select a template and click **Click here to edit this template**. The template design screen appears. You can add parts to the editable panes that the template inherits from the layout.
3. To add a part to an empty pane, click the **pane** button. If a part exists in the pane, click the **Page part** button. A menu appears. If the**Page part** button displays an hourglass, the part is in the content approval workflow.

   For information about the menu items, see Buttons in Pages & Templates on page 5.

   - To edit a part, select **Edit**. The Edit Part screen appears.

     For information about parts, see the *Parts Guide*.
   - To remove a part, select **Cut**. The program saves the part to the clipboard. To place it in another pane, select **Paste**.

Warning: You can cut and paste a part from one pane to another, but if your session times out, the program clears the clipboard. When you reopen the program, you can no longer paste the part.

   - To add a part, select **Insert part**. The Select a Part screen appears. You can search for parts by folder, part type, name, or site.
   - To create a part, select **New part**. The New Part screen appears.
   - To create a new Formatted Text and Images part, select **Add Formatted Text & Images**. For more information about this part, see the *Parts Guide*.
   - *Administrator Step*: To edit the style sheet, select **Edit style sheet**.
   - To move a part within a pane, select **Move up** or **Move down**.
   - To hide **Page part** buttons on the template design screen, select **Show/hide part markers**.
   - To enable links in a Menu part, click **Enable navigation**. This allows you to click links in the menu and access the page design screen to those pages.

Note: To view how the template appears to different website users, select a role in the **View As** field and click **View**. You can preview the template as visitors see it on desktop browsers or mobile devices. To display the page as it appeared on a particular date, enter the date in the **on date** field and click **View**.

4. To edit the template's layout or style sheets, click **Edit layouts & CSS**. You can access the layouts and style sheets for desktop browsers and mobile devices. Style sheets are listed in the cascading hierarchy that you define in style sheets. To see and manage your style sheets, select **Manage style sheets**.

Warning: When you edit a layout, you change it for all the web pages that use it. To create a unique layout for a template, you can copy an existing layout. For more information, see Layouts on page 19.

Warning: When you edit a style sheet, you change it for all layouts, templates, and web pages that use it. For more information about style sheets, see Style Sheets on page 25.

5. To see your style sheets, click **Merge style sheets**.
6. From this screen, you can also edit the template's properties, copy the template into a new one, and delete the template.
7. To delete the template, click **Delete**. You can restore it from the Deleted folder on the Folders tab.
8. The program automatically saves your changes. To return to *Pages & templates*, click **Return**.

Files

Upload Files **16**

Edit File Properties **17**

In *Files*, you can upload, store, and manage all files for your website. *Files* lets you upload and approve multiple files at one time and gives you access to all Documents part files in one location.

Upload Files

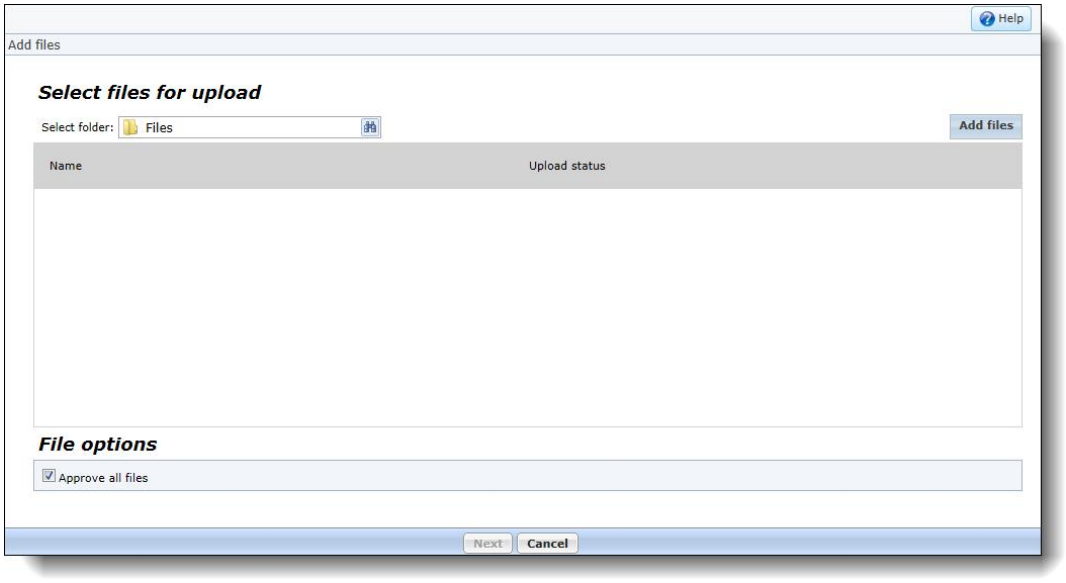
In *Files*, you can upload files for your website and store them in folders. On the Folders tab, a root **Files** folder appears. You cannot edit or delete this folder, but you can click **Create a new folder** to add subfolders as necessary. You can also create subfolders within subfolders to organize your files, and you can move, rename, and delete folders as necessary.

After you upload files, you can post them on web pages and create links to documents from *Files*. You can also specify which users and roles can view, upload, and manage files.

Add files to *Files*

When you host multiple sites, you can add files for individual sites. To do this, log in to the site and add the file. For more information, see the *Administration Guide*.

1. From *Site explorer*, click **Files**. *Files* appears.
2. Click **Add files**. The Add files screen appears.



3. Click **Add files**. A select files screen appears.

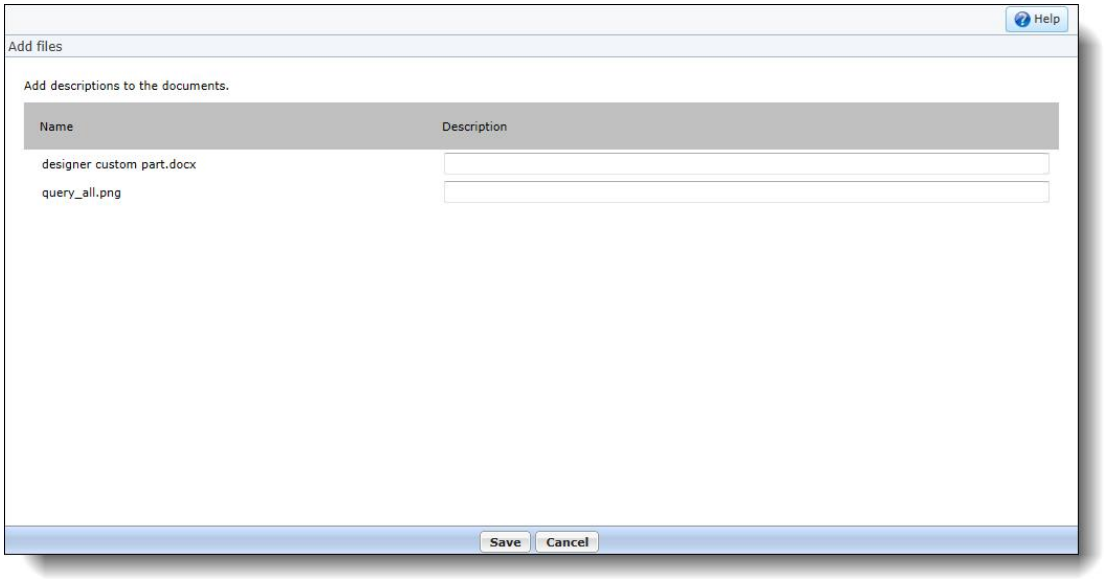
Note: If you do not allow Flash files in your browser, five **Browse** buttons appear in place of the **Add**

files button. When the browser does not allow Flash files, you must select files one at a time, and you can only upload five at a time.

4. Select files from your hard drive or computer network and click **Open**. The file names appear under **Select files for upload**.

   Warning: Files cannot exceed size limitations. The default is set to 4 megabytes, but the system administrator can adjust the limit in the web.config file. For example, to increase the size to 8192, add <location path="FileUpload.ashx"><system.web><httpRuntime maxRequestLength="8192"/></system.web></location> to the configuration node of web.config.

5. To add more files, click **Add files** again. You can upload files from multiple locations. If you add a file by mistake, click **Delete** to remove it.
6. In the **Select folder** field, select a folder to store the files.
7. To approve the files for your website, select **Approve all files** under **File options**.
8. Click **Next**. An additional screen appears that lists the uploaded files.



9. In the **Description** field, you can enter a description for each file.
10. Click **Save**. You return to *Files*.

Edit File Properties

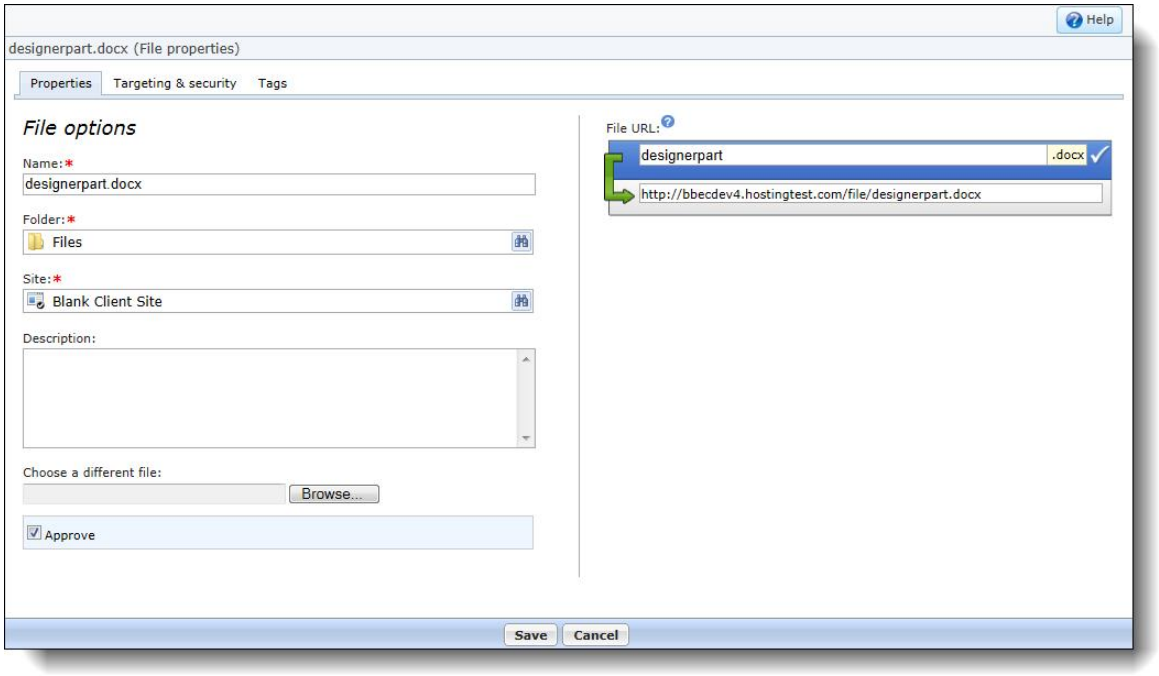
After you upload files to *Files*, you can edit them as necessary. You can replace files, edit names, URLs, folder and site locations, and change the approval status. You can also edit targeting and security preferences and modify file tags.

Remember that if you include a file on multiple web pages, changes in *Files* affect all instances.

Edit file properties

1. From *Site explorer*, click **Files**. *Files* appears.
2. Select a file and click **Edit**. The File properties screen appears.

Note: To search for files, use the Search tab. You can search by name, description, and site.



3. In the **Name** field, edit the name of the file.
4. In the **File URL** field, edit the end of the URL for the web page that stores the file. By default, the URL includes the file's folder, name, and extension. You can edit the folder and name in the URL, but this does not affect the file's name or the folder where it is stored. You cannot edit the file extension.
5. To approve the file for your website, select **Approve**.
6. To replace the file, click **Browse** beside the **Choose a different file** field. A choose file screen appears. Select a file on your hard drive or computer network.

   Warning: Files cannot exceed size limitations. The default is set to 4 megabytes, but the system administrator can adjust the limit in the web.config file. For example, to increase the size to 8192, add <location path="FileUpload.ashx"><system.web><httpRuntime maxRequestLength="8192"/></system.web></location> to the configuration node of web.config.
7. To enter security settings, select the Targeting & security tab. For information about security settings, see the *Parts Guide*.
8. On the Tags tab, enter keywords or phrases to identify the file. The Tags tab allows files to be included in the results for Suggested Content parts. For information about tags, see the *Parts Guide*.

   Note: You can use a file's tags as search criteria on the Search tab in *Files*. The tags are not included as hyperlinks on Tag Display parts.
9. Click **Save**. You return to *Files*.

Layouts

Create Layouts **19**

In *Layouts*, you design the overall appearance of the pages on your website. Layouts are a critical part of your website, and the design settings that you put in place play a crucial role in the success of each and every page on your website.

On your layouts, you include images, links, and other items that appear on web pages throughout your website. In combination with style sheets, layouts provide the basis of your website's design and allow you to create a consistent look and feel for your web pages.

In addition, you use layouts to define where you can place content on web pages and templates. You include content placeholder panes in the layouts, and after you associate the layout with web pages and templates, you can insert parts in the panes to display content on your website.

Warning: We strongly recommend that you limit full supervisor rights for *Layouts* to a select group of users. General users should not access layouts. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in *Layouts*.

Create Layouts

When you design layouts, you create the design settings that play a crucial role in the success of your entire website. Layouts determine the appearance of multiple pages on your site, and they must be in place before you can create individual web pages.

Before you create a layout, you must have at least one style sheet available. The style sheets you associate with a layout allows you to edit the appearance of elements such as fonts and colors. Style sheets also affect the appearance of the content on the web pages and templates that you associate with the layout. For information about style sheets, see Style Sheets on page 25.

On your layouts, you include images, links, and other items to display throughout your site. These design elements provide the backdrop for all web pages and templates associated with a particular layout. In addition, you include content placeholder panes in layouts to define where to place content on templates and web pages. After you associate a page or template with a layout, you can insert parts in these panes and display content on your website.

For example, you can create a layout with your logo at the top, your mission statement at the bottom, background colors that match your branding, and content placeholder panes throughout. When you create a template based on the layout, the template inherits the logo, mission statement, and background colors, and you can insert parts in the panes. When you create pages based on such a template, the pages inherit the logo, mission statement, colors from the layout, as well as any content from the template. In the remaining content placeholder panes, you can insert parts to display content that is particular to the web page.

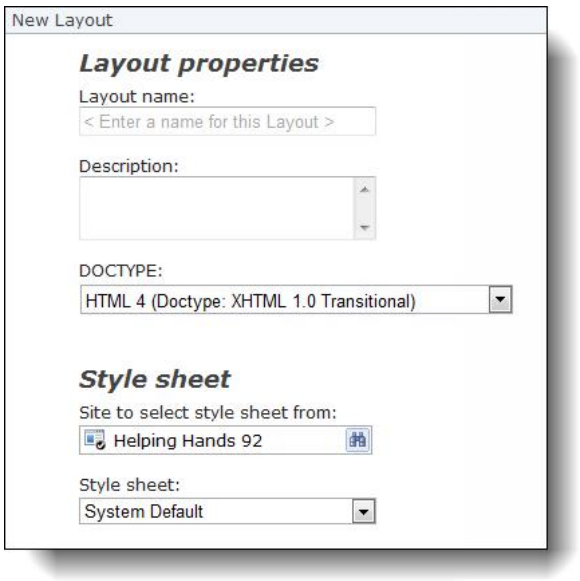
Warning: We strongly recommend that you limit full supervisor rights for *Layouts* to a select group of users. General users should not access layouts. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in *Layouts*.

Create a layout

If you host multiple sites, you can log in to a site to create site-specific layouts for that site. For more information, see the *Administration Guide*.

1. From *Site explorer*, click **Layouts**. *Layouts* appears.
2. Click **New layout**. The New Layout screen appears.

   Note: You can also use an existing layout as the starting point for a new layout. Select a layout in the gallery and click **Click here to copy this layout**. After you save the layout with a new name, you can edit it as necessary.



3. Under **Layout properties**, enter a name and description for the layout, and select the DOCTYPE for the pages and templates that use this layout. The layout name is for internal use and does not appear on your website.

   Note: We recommend selecting HTML 5, which is backwards compatible. If you prefer to keep HTML 4 as the DOCTYPE, HTML 5 elements still render correctly for modern browsers (for example, *Internet Explorer 9* or higher).

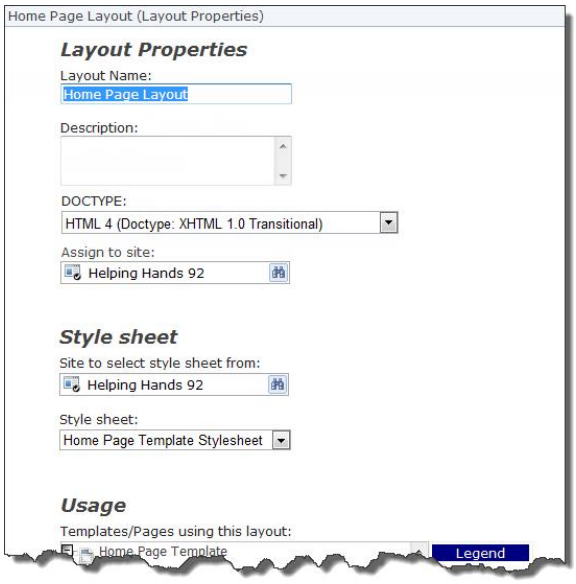
4. Under **Style sheet**, select a site to narrow the list of style sheets you can use for the layout, and then select a style sheet for the layout. If you do not host multiple websites, your single website defaults in the first field. For information about style sheets, see Style Sheets on page 25.
5. Click **Next**. You return to **Layouts**. For information about how to design a layout, see Design a layout on page 21.

Edit layout properties

1. From *Site explorer*, click **Layouts**. *Layouts* appears.

   Warning: We strongly recommend that you limit full supervisor rights for *Layouts* to a select group of users. General users should not access layouts. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in *Layouts*.

2. Select a layout and click **Click here to view/edit this layout's properties**. The Layout Properties screen appears.



3. Edit the layout name, description, DOCTYPE, and style sheet as necessary.
4. If you host multiple sites, the **Assign to site** field appears. You can move a layout from its current site to another site. If the layout is in use on a web page on the source site, it continues to appear on that site. However, the layout is now associated with the target site and its security.
5. Under **Usage**, the screen displays the templates and web pages that use the layout.
6. Click **Save**. You return to *Layouts*. For information about how to design a layout, see Design a layout on page 21.

Preview a layout

With preview, you can test a layout before it is live on your website. The preview replaces a web page's existing layout with the new layout, but it does not alter the actual web page.

> ***Tip:*** Preview uses the names of content placeholder panes to determine where to display page content. For example, content in an existing layout's pane "1" appears in the new layout's pane "1." If content placeholder names do not match, then page content does not appear in the preview.

1. From *Site explorer*, click **Layouts**. *Layouts* appears.
2. Select a layout and click **Click here to preview**. The Preview Layout screen appears.
3. In the **Choose a page for a preview** field, select a page for the preview.
4. Click **Next**. The program creates a preview URL. It applies the new layout to the web page in a new instance of your web browser. The preview does not alter your live website.

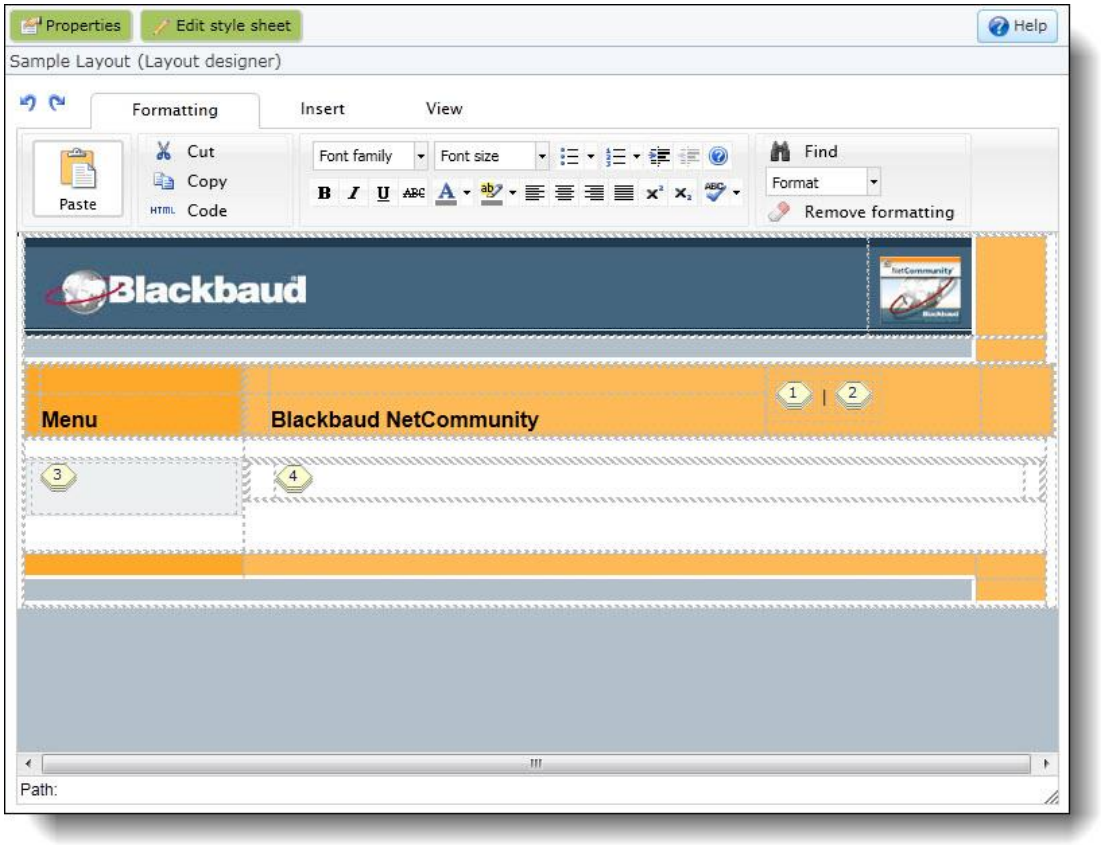
> ***Note:*** You can navigate in the preview URL to see the layout in place throughout your website. You can also share the preview URL with other users to allow them to preview the layout.

Design a layout

1. From *Site explorer*, click **Layouts**. *Layouts* appears.

Warning: We strongly recommend that you limit full supervisor rights for *Layouts* to a select group of users. General users should not access layouts. Any change can affect multiple web pages. We recommend that only users knowledgeable in all areas of website design and the program perform tasks in *Layouts*.

2. Select a layout and click **Click here to edit this layout**. The Layout designer screen appears.



3. In the HTML editor content area, enter the content for the layout and format its appearance. The content appears on all pages that you associate with the layout. For example, you can include your organization's mission statement and logo to display them throughout your website.

   For information about the HTML editor, see the *Program Basics Guide*.

   Note: When you update a layout, it is important to include similar characteristics from the rest of your website. This provides a uniform look for your website as users move from page to page. For example, include buttons, links, images, fonts, and colors that are consistent with the rest of your site. You can use Cascading Style Sheets (CSS) to make most of these customizations in *Style sheets*. For information about style sheets, see Style Sheets on page 25.

4. To add a content placeholder pane to the layout, click **Content placeholder** on the Insert tab in the toolbar.

5. On the screen that appears, enter a name and description to identify the pane.

   Tip: We recommend that you use a standard naming convention for your content placeholder panes. This allows you to change the layout for a web page and still retain its content. For example, if you replace the layout for a page with a layout that uses the same pane names, the content in the original

layout's panes appear in the corresponding panes in the new layout. So page content in the original pane "1" would appear in the new layout's pane "1." If pane names do not match, then page content no longer appears on a web page if you replace its layout.

6. Click **Insert**. A yellow icon appears for the content placeholder pane.

   You use these panes to insert content on templates and pages. When you create templates and web pages, you select a layout, and its content placeholder panes determine where you can insert parts. For more information, see Website Overview on page 1.

7. To edit the style sheet for the layout, click **Edit style sheet**. The Edit style sheet screen appears. After you edit the style sheet, click **Apply**. The changes appear in your page design

   Warning: When you edit a style sheet, you change the style for any layouts, templates, or web pages that use it. If a layout uses the default style sheet, the **Edit style sheet** button does not appear because you cannot edit the default style sheet. For more information, see Style Sheets on page 25.

8. Click **Save**. You return to *Layouts*.

Style Sheets

Create Style Sheets **25**

Style sheets create unique elements such as colors, font types and size, and spacing for your website. Style sheets, written in Cascading Style Sheets (CSS) format, are easier to use than other methods such as HTML. Unless you specify a custom style sheet, your website uses the default style sheets. You can create custom style sheets in *Style sheets* that override a default style. When you override elements in style sheets, we recommend you make changes only once to update the pages that use the style sheet. This saves time and helps eliminate mistakes when you update your website. You use style sheets when you create layouts in *Layouts*. In *Layouts*, you link a style sheet to the layout. For more information, see Create Layouts on page 19.

Create Style Sheets

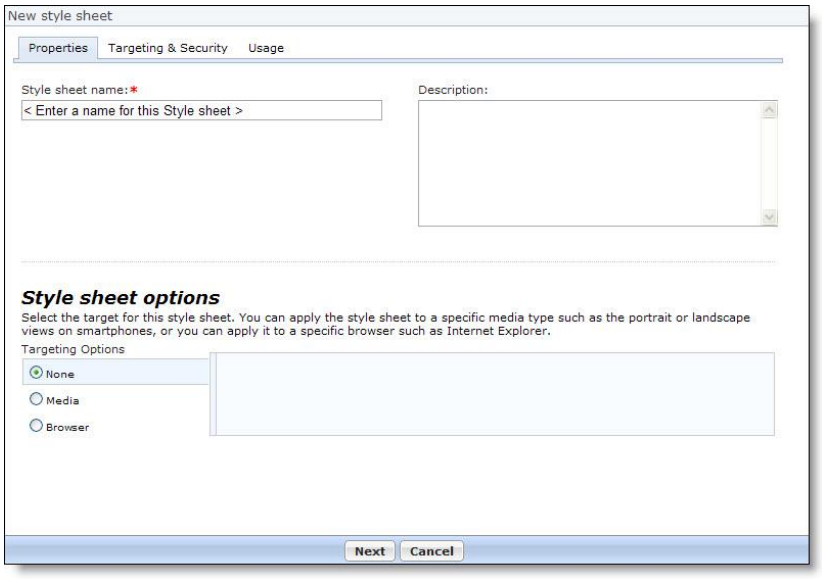
When you design and customize your website, we recommend you test the rendering of your site in multiple browsers. For example, if your primary browser is *Internet Explorer*, also test your site with Mozilla *Firefox*. If your site renders differently, we recommend you modify your style sheets so your site has a similar look and feel in all browsers you test.

Warning: We strongly recommend your organization assigns full Administrator rights to only a select number of users for *Style sheets*. General users should not have access to style sheets. Any change can affect multiple web pages. We strongly recommend only users knowledgeable in all areas of website design and the program perform tasks in *Style sheets*.

Create a style sheet

1. From *Site explorer*, click **Style sheets**. *Style sheets* appears.
2. Click **New style sheet**. The New style sheet screen appears.

   Note: You can also use an existing style sheet as the starting point for a new style sheet. Select a style sheet on the All style sheets tab and click **Click here to copy this style sheet**. After you save the style sheet with a new name, you can edit it as necessary.



3. In the **Style sheet name** field, enter a name for your style sheet. This name helps program users quickly identify the file in *Style sheets*. The name is for internal use and does not appear on your website.
4. In the **Description** field, enter any additional information about the style sheet.
5. When you host multiple sites, the **Assign to site** field appears so you can move a style sheet from its current site to another site. If the style sheet is in use on a web page on the source site, it continues to appear on that site. However, the style sheet is now associated with the target site and its security.
6. Under **Style sheet options**, select whether to apply the style sheet to a specific target.
   - To make the style sheet available for all templates, select **None**.
   - To apply the style sheet to a specific media type such as portrait screen dimensions for smartphones, select **Media**. In the textbox, enter the media query for the target.

     For help to create a media query, please contact the appropriate software vendor or IT professional for assistance since this is beyond Blackbaud's scope of support.
   - To apply the style sheet to a specific browser, select **Browser**. For example, an older browser may not handle your preferred styles, so you may need to create a style sheet to handle these exceptions to the browser.
7. To assign security rights for users and roles for the style sheet, select the Targeting & Security tab.

Note: You can apply the style sheet to the Desktop browsers or Mobile devices tabs in Style sheets. In addition, you can also apply the style sheet directly to a layout. For information about layouts, see Layouts on page 19.

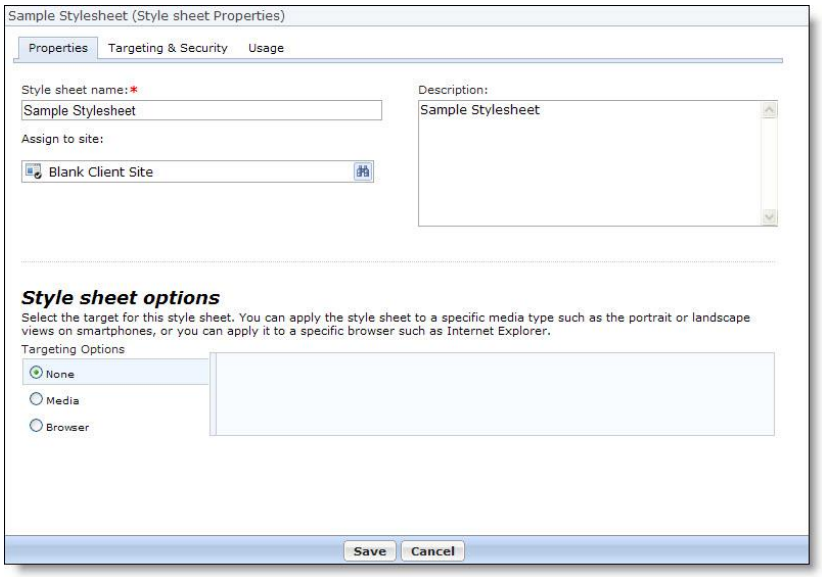
8. Click **Next**. The Edit style sheet screen appears. For information about how to design a style sheet design, see Design a style sheet on page 28.

Edit a style sheet's properties

1. From *Site explorer*, click **Style sheets**. *Style sheets* appears.

Warning: We strongly recommend that your limit rights for this section to a select group of users. General users should not access style sheets. Any change can affect multiple web pages. We strongly recommend only users knowledgeable in all areas of website design and the program perform tasks in *Style sheets*.

2. Select a style sheet and click **Click here to view/edit this style sheet's properties**. The Style sheet Properties screen appears.



3. Make changes as necessary. For information about the options on this screen, see Create a style sheet on page 25.

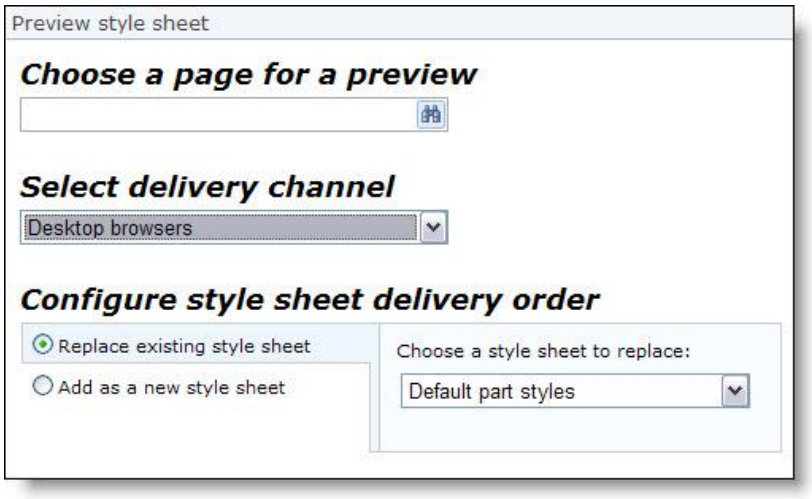
   Note: When you host multiple sites, the **Assign to site** field appears so you can move a style sheet from its current site to another site. If the style sheet is in use on a web page on the source site, it continues to appear on that site. However, the style sheet is now associated with the target site and its security.

4. To view the web pages that use the style sheet, select the Usage tab.
5. Click **Save**. You return to *Style sheets*.

Preview a style sheet

With preview, you can test a style sheet before it is live on your website. The preview applies the new style sheet to a web page but does not alter that page on your live site.

1. From *Site explorer*, click **Style sheets**. *Style sheets* appears.
2. On the All style sheets tab, select a style sheet and click **Click here to preview**. The Preview style sheet screen appears.



3. In the **Choose a page for a preview** field, select a page for the preview.
4. In the **Select delivery channel** field, select whether to preview the style sheet in a desktop browser or a mobile device.
5. Under **Configure style sheet delivery order**, select where to apply the style sheet. You can replace an existing style sheet or add the style sheet to your list of applied style sheets.
6. Click **Next**. The program creates a preview URL. It applies the new style sheet to the web page in a new instance of your web browser. The preview does not alter your live website.

Note: You can navigate in the preview URL to see the style sheet in place throughout your website. You can also share the preview URL with other users to allow them to preview the style sheet.

Design a style sheet

1. From *Site explorer*, click **Style sheets**. *Style sheets* appears.

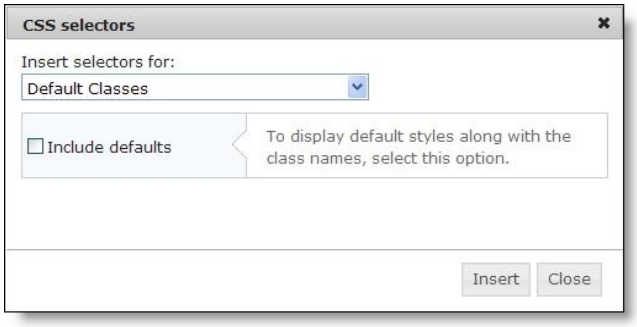
Warning: When you design and customize your website, we recommend you test the rendering of your site in multiple browsers. For example, if your primary browser is *Internet Explorer*, we recommend you also test your site with Mozilla *Firefox*. If your site renders differently, we recommend you modify your style sheets so your site has a similar look and feel in all browsers you test.

2. Select a style sheet and click **Click here to edit this style sheet** under **Action**. The Style sheet text editor screen appears.

   If you create a style sheet, first save the style sheet properties. For information, see Create a style sheet on page 25.

On this screen, you can edit properties through CSS. For example, you can edit the web page's fonts, colors, backgrounds, and other properties. You can also insert HTML tags and apply styles to the tags.

3. To load the CSS selectors that allow you to edit the appearance of the parts that appear on your web pages, click **Insert CSS selectors**. The Insert CSS Selectors screen appears. You can access this screen multiple times to add multiple selectors.



4. In the **Insert selectors for** field, select the CSS selectors to include in the style sheet editor. To include the default style settings along with the names, select **Include defaults**.
5. Click **Insert**. You return to the style sheet editor, and the selectors appear in a new section within the editor. Edit the styles as necessary.

Note: To identify css classes on parts, we recommend you use a third-party tool such as *Firebug*.

6. After you edit the style sheet, click **Save** to return to the page designer. You can also click **Apply** to keep the style sheet editor open while you access web pages to view your changes.
7. Click **Save**. You return to *Style sheets*.

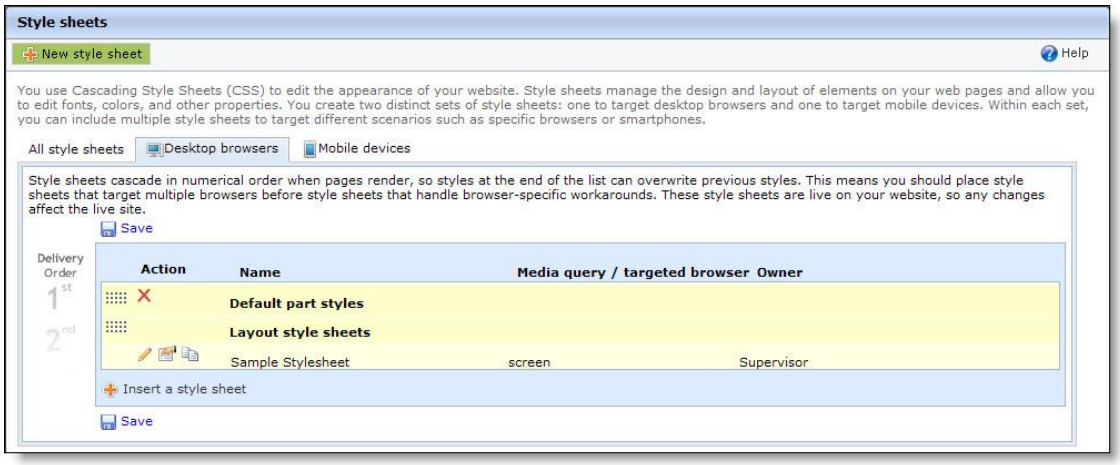
Apply a style sheet

You can apply style sheets to desktop browsers, mobile devices, or both. Your existing style sheets appear on the All style sheets tab in numerical order. The program gives priority to style sheets that are higher in the list, and

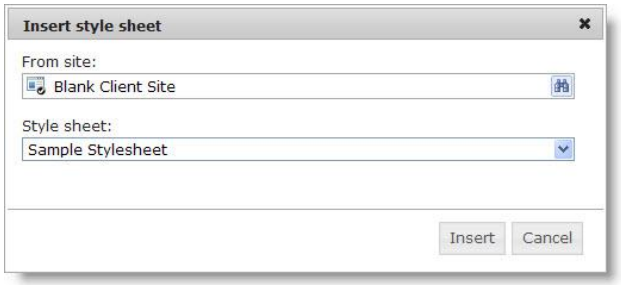
uses others when there are exceptions, such as when a website visitor is using an older browser. You may apply style sheets to desktop browsers and mobile devices and adjust the hierarchy as needed.

1. From *Site explorer*, click **Style sheets**.The *Style sheets* screen appears.

2. To apply a style sheet to desktop browsers or mobile devices, select the Desktop browsers or Mobile devices tab. These tabs display their sets of style sheets and the order they are applied.



3. Click **Insert a style sheet**. The Insert style sheet window appears.



4. Select a style sheet. If you host multiple sites, select the site for the style sheet.
5. To rearrange the order of the style sheet, click the dotted buttons and drag and drop it.
6. Click **Save**.

Note: You also apply style sheets directly to layouts. When you create a layout, you select a style sheet for desktop browsers and for mobile devices. These style sheets are represented on the Desktop browsers and

Mobile devices tabs in Style sheets in the Layout style sheets entry. For information about layouts, see Layouts on page 19.

Image Library

Upload Images **33**

Edit Image Properties **35**

Photo Albums on Your Website **37**

In *Image library*, you can upload and store images to display on your website. After you upload images, you can use them repeatedly on your website. For example, you can upload an image of volunteers at work on your latest project and display it on a welcome page, a volunteers page, and a recent events page.

Upload Images

In *Image library*, you can upload images for your website and store them in folders. On the Folders tab, a root **Images** folder appears. You cannot edit or delete this folder, but you can click **Create a new folder** to add subfolders as necessary. You can also create subfolders within subfolders to organize your images, and you can move, rename, and delete folders as necessary.

After you upload images, you can display them throughout the website.

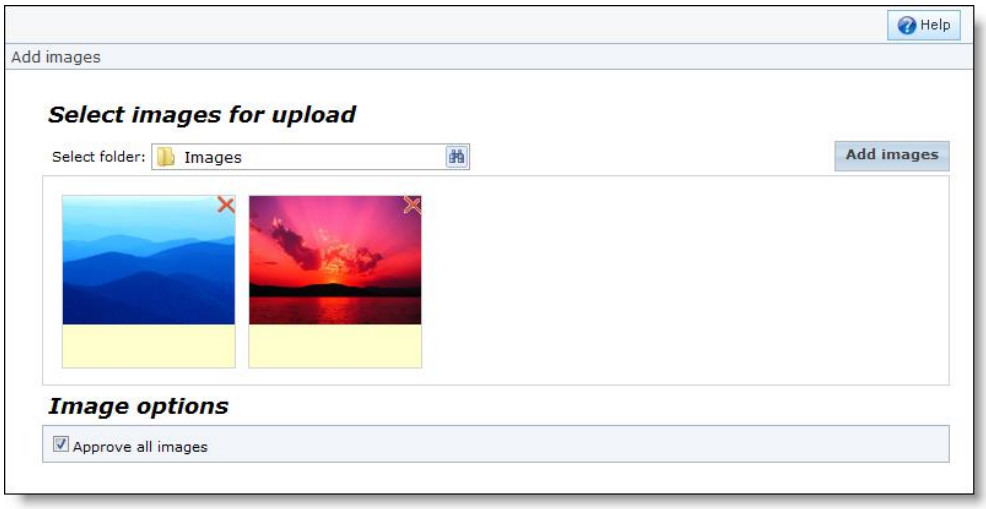
You can also allow website users to upload images.

Note: On the Settings tab in *Sites & settings*, you can require approval for the images that users upload. Under **User Image Options**, select **Require approval for all images uploaded by users**. When you select this checkbox, you must approve images before users can post them on your website. You can also limit the number of images users can upload, set a maximum file size, and select a default folder. For information, see the *Administration Guide*.

Add images to *Image library*

When you host multiple sites, you can add images for individual sites. To do this, log in to the site and add the image. For more information, see the *Administration Guide*.

1. From *Site explorer*, click **Image library**. *Image library* appears.
2. Click **Add images**. The Add images screen appears.



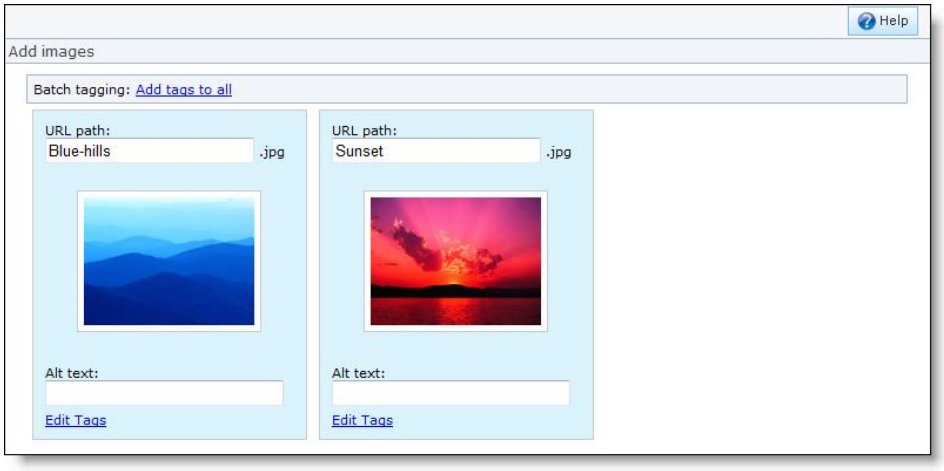
3. Click **Add images**. A select files screen appears.
4. Select images from your hard drive or computer network and click **Open**. Thumbnails for the images appear under **Select images for upload**.

   Tip: Images must be *.bmp, *.gif, *.ico, *.jpeg, *.jpg, or *.png files. In addition, each file must meet the size limit for images. The default is set to 4 megabytes, but you can further restrict the maximum size in *Sites & settings*. The system administrator can also adjust the limit in the web.config file. For example, to increase the size to 8192, add <location path="FileUpload.ashx"><system.web><httpRuntime maxRequestLength="8192"/></system.web></location> to the configuration node of web.config.

5. To add more images, click **Add images** again. You can upload images from multiple locations. If you add an image by mistake, you click **Delete** on the thumbnail to remove it.
6. In the **Select folder** field, select a folder to store the images.
7. To approve the images for your website, select **Approve all images** under **Image options**.

   Note: If you select **Require approval for all images uploaded by users** on the Settings tab in *Sites & settings*, you must approve images that website users upload before they can post them on your website. If users post images that are not approved, they can see their images, but all other users see "Photo Not Available" graphics.

8. Click **Save & continue**. Additional options appear for the images.



9. In the **URL path** field, edit the end of the URL for the web page that stores the image. To improve rankings in Google image search results, image URLs should be as discrete and descriptive as possible. By default, the URL includes the image's folder, name, and extension after your domain.
   - If you edit the image name, both the URL and the image name are updated.
   - If you edit the folder, only the URL is updated. The folder where you store the image remains the same.
   - You cannot edit the file extension.
10. In the **Alt text** field, enter text to appear in place of an image if it cannot display for some reason.
11. To associate tags with images, click **Edit Tags** or **Add tags to all**.Tags are keywords or phrases that identify an image's content, and you can use them to search for images on the Search tab in *Image library*. On the Add selected tags screen, you can create tags or use existing tags.

    For more information about tags, see the *Parts Guide*.
12. Click **Save**. You return to *Image library*.

Edit Image Properties

After you upload images to *Image library*, you can edit them as necessary. You can replace images, edit names, URLs, and alt text, enter a photographer and date, and change the approval status. You can also edit targeting and security preferences and image tags.

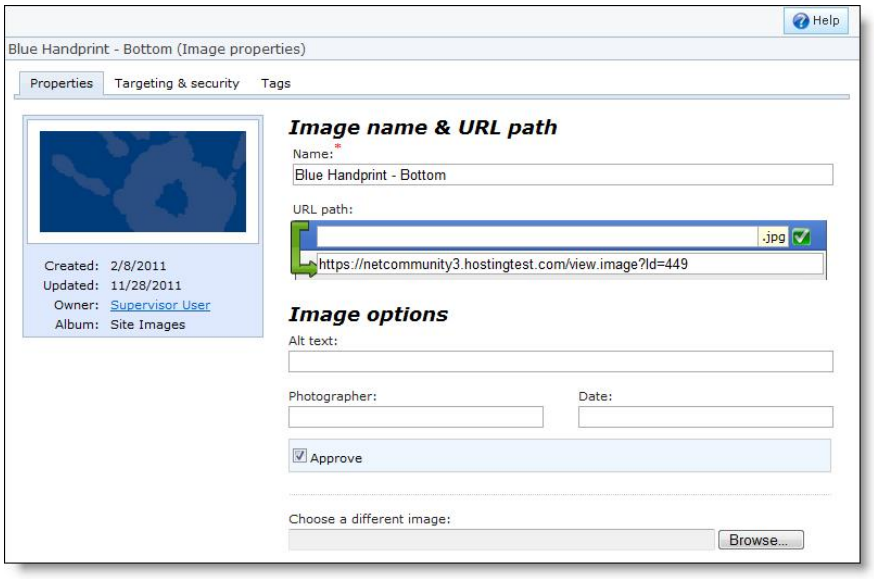
Remember that if you include an image on multiple web pages, changes in *Image library* affect all instances.

Edit image properties

1. From *Site explorer*, click **Image library**. *Image library* appears.
2. Select an image in the gallery and click **Edit**. The Image properties screen appears.

   Note: To search for images, use the Search tab. You can search by name, tag, image ID, image type, approval status, and site.

   A thumbnail of the image appears on the Properties tab along with the dates when it was uploaded and last modified, the user who uploaded it, and the folder where it is stored. To access the user record of the website user who uploaded the image, click the user name. The User editor page in *Users & security* appears



3. In the **Name** field, edit the name of the image. The name is for internal use and does not appear on your website.
4. In the **URL path** field, edit the end of the URL for the web page that stores the image. To improve rankings in Google image search results, image URLs should be as discrete and descriptive as possible. By default, the URL includes the image's folder, name and extension. You can edit the folder and name in the URL, but this does not affect the image's name or the folder where it is stored. You cannot edit the file extension.
5. In the **Alt text** field, edit the text that appears in place of the image if it cannot display for some reason.
6. In the **Photographer** and **Date** fields, enter the creator of the image and when it was created.
7. To approve the image for your website, select **Approve**.

   Note: If you select **Require approval for all images uploaded by users** on the Settings tab in *Sites & settings*, you must approve images that website users upload before they can post them on your website. If users post images that are not approved, they can see their images, but all other users see "Photo Not Available" graphics.

8. To replace the image, click **Browse** beside the **Choose a different image** field. A choose file screen appears. Select an image on your hard drive or computer network.

   Tip: Images must be *.bmp, *.gif, *.ico, *.jpeg, *.jpg, or *.png files. In addition, each file must meet the size limit for images. The web.config file limits images to 4 megabytes, but administrators can further restrict the maximum size on the Settings tab in *Sites & settings*.

9. To enter security settings, select the Targeting & security tab. For information about security settings, see the *Parts Guide*.
10. On the Tags tab, enter keywords or phrases to identify the image. The Tags tab for images is the same as for parts, but tags for images are not included in the results for the Suggested Content or Tag Display parts. For information about tags, see the *Parts Guide*.

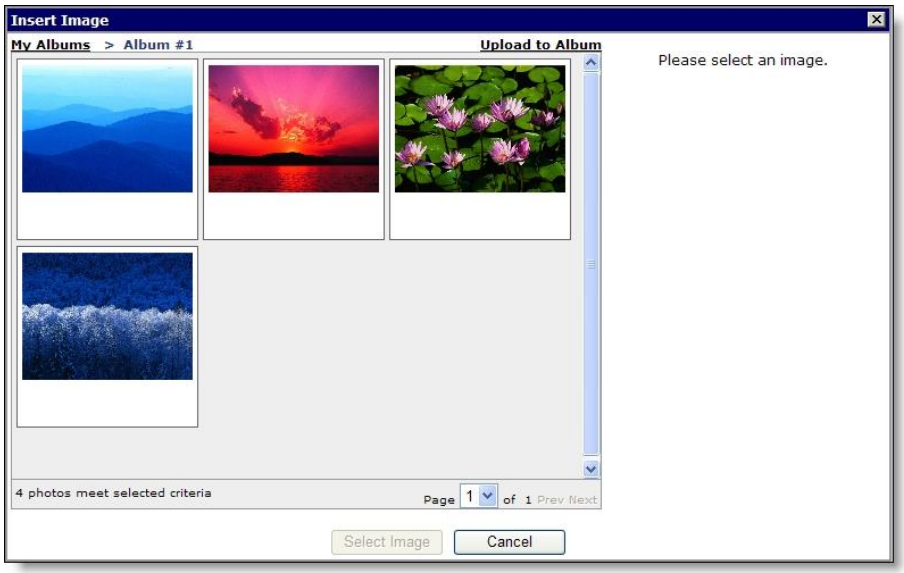
    Note: You can use an image's tags as search criteria on the Search tab in *Image library*. The tags are not included as hyperlinks on Tag Display parts.

11. Click **Save**. You return to *Image library*.

Photo Albums on Your Website

Depending on user roles for your website, users may be able to post photos on some pages of your website. In areas where users can post photos, they use albums to manage photos and to select them for your website. The areas where users can manage photos include personal pages, the user networking site, user photos forms, and slideshows.

On personal pages, user photos forms, and slideshows, users can only upload photos to their photo albums and select images to display on the website.



Note: When you select **Enable Photos** for a User Networking Manager part, security options appear when a member creates an album. The member can make the photos viewable by everyone, friends only, or just the user (private). Album security applies to all areas where the photos are used in the website, including slideshows, personal pages, and profile displays.

On the user networking site, users can also create and delete albums, designate default albums, and select whether to allow other website users to view images in the albums. In addition, they can enter captions and other data for their images, copy or move images to other albums, select images as album covers and profile pictures, and delete images in their albums.

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Friends
Groups
Photos
Preferences
Photos
Create New Album
My Photos
Album #1
Current Default
Photos: 4
Created:
4/9/2009
Last Updated:
4/13/2009
Edit Album
View Album
1 album meets selected criteria
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Friendly URLs

With friendly URLs, you can allow website users to access web pages with multiple URLs. For example, if your standard donation page is www.example.org/donate, you can create the friendly URL www.example.org/disasterrelief to direct users to that page in response to a natural disaster. Web browsers display friendly URLs just like the actual URLs.

Website users can also create friendly URLs. For example, if you support user networking on your website, a website user can add a profile page for the account and create a URL that is easy to remember, type, and verbalize to other users.

You can also create friendly URLs to link to another website. For example, you can create a friendly URL to link to an elected official's website. When you create a friendly URL, we recommend you keep it short, simple, and easy for users to remember and verbally communicate.

Friendly URLs are an extension of your website's domain. For example, a friendly URL to a web page about your organization's annual walkathon could be "www.example.org/walkathon." The domain name entered in the **Site URL** field on the Settings tab in *Sites & settings* determines the domain that appears in friendly URLs. For more information, see the *Administration Guide*.

Create a friendly URL

You can define a URL for any page on your website. You can also create URLs for pages in *Pages & templates*. Website users create URLs for personal pages for the Chapter Manager, Personal Page Manager, or User Networking Manager parts.

1. From *Site explorer*, click **Friendly URLs**. *Friendly URLs* appears.
2. Click **New URL**. The New URL screen appears.

3. Under **Friendly URL**, the domain entered in the **Site URL** field on the Settings tab in *Sites & settings* appears. In the field, enter the remainder of the URL for the friendly URL. For example, for a web page about your organization's annual walkathon, enter "walkathon."

   When you create friendly URLs, you can define the site architecture. For example, you can create a friendly URL of "www.example.org/walkathon" for a web page with general information about your walkathon and "www.example.org/walkathon/donate" or "www.example.org/walkathon/donate.html" for the Donation Form associated with the event.

Note: Friendly URLs combine the domain name from the **Site URL** field in *Sites & settings* with the friendly URL information that you enter here. To change the domain portion of the URL, edit the URL in the **Site URL** field. For more information, see the *Administration Guide*.

4. To verify the friendly URL is available, click **Check Availability** next to the field. If the link is available, a success message appears.

   If the URL is not available, adjust the link so it is unique.

5. Under **Target**, select the web page for the friendly URL.
   - To search for the web page, select **Site page** and browse to the page to associate with the link.
   - To enter the target URL for the web page, select **Enter URL**. A field appears for you to enter the full URL.

Tip: If you are creating a friendly URL to link to an external website, select **Enter URL** and enter the external target URL in the field that appears.

6. Click **Save**. You return to *Friendly URLs*. In the grid, the new friendly URL appears.

Edit a friendly URL

After you create a friendly URL, you can edit it as necessary. For example, you can correct typographical errors or associate the friendly URL with a different web page.

1. From *Site explorer*, click **Friendly URLs**. *Friendly URLs* appears.

2. In the grid, find the friendly URL to edit and, in the **Action** column, click **Edit**. The friendly URL appears.
3. Edit the URL or web page associated with the link. For information about how to create a friendly URL, see Create a friendly URL on page 39.

Note: Friendly URLs combine the domain name from the **Site URL** field in *Sites & settings* with the friendly URL information that you enter here. To change the domain portion of the URL, edit the URL in the **Site URL** field. For more information, see the *Administration Guide*.

4. Click **Save**. You return to *Friendly URLs*.

Delete a friendly URL

You can delete friendly URLs from your website. For example, you can delete a friendly URL to remove a link for a web page that no longer exists.

1. From *Site explorer*, click **Friendly URLs**. *Friendly URLs* appears.
2. In the grid, find the friendly URL to delete.
3. In the **Action** column, click **Delete**. A confirmation message appears.

4. To delete the friendly URL, click **OK**. You return to *Friendly URLs*.

Approvals

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In *Approvals*, you can view information about all Formatted Text and Images and Formatted Text and Images (Secured) parts that are under construction or pending approval. The grid displays each part's name, type, owner, and approval status, and you can filter by workflow or part name. From *Approvals*, you can access these part to review content and adjust approval statuses.

Content Approval: Process Overview

To create and approve content that appears on your website requires several steps in different areas of the program:

Step 1 — In *Users & security*, designate users for your workflow management roles. For more information, see Approval and Workflow Task Rights on page 45.

Step 2 — Designate users for your content approval roles. For information, see Content Approval Roles on page 44.

Step 3 — In *Workflows*, the user with rights to manage workflows creates the content approval workflows for the Formatted Text and Images and Formatted Text and Images (Secured) parts on your website. When you create a workflow, you select whether it is the default workflow for its part type.

Step 4 — In *Notifications*, you create the part approval notifications for the workflows. You can create notifications to alert users when a part is ready for approval, published, or rejected. When you create a notification, you select the workflows that it applies to.

Step 5 — In *Parts*, the content author creates or revises a Formatted Text and Images or Formatted Text and Images (Secured) part. When the user begins to design the part, the program automatically assigns the part an approval status of “Draft.” If the user does not have rights to manage workflows, the program applies the default workflow for the part type. If the user can manage workflows, he can select another workflow for the part, such as to have different users approve it.

Step 6 — When the content author completes the design of the part, on the Content Approval tab of the part, he changes the approval status to “Ready for Approval.” If you create a part approval notification for the Ready for Approval status, the users in the content approval role receive a notification to alert them that the part requires approval.

Step 7 — In *Pages & templates*, the web designer creates web pages and templates that contain the part.

Step 8 — In *Approvals*, the user in the content approval role views the parts that require approval. The user can view all pending parts or only those that use a specific workflow. From *Approvals*, the user can access the pending part in *Parts* for review and approval.

Step 9 — In *Parts*, the user in the content approval role can review the content of the pending part. On the Content Approval tab, the user can send an email message to the author to discuss the content or select whether to approve or reject the content.

- To approve the content, the user in the content approval role changes the approval status to “Publish.” If you create part approval notification for the Published status, the content author receives a notification to alert them of the approval status change. The program automatically updates the pages and templates that contain the part with the approved content.
- To reject the content, the user in the content approval role changes the approval status to “Reject.” If you create a part approval notification for the Rejected status, the content author receives a notification to alert them of the approval status change. The program automatically saves the rejected version with a status of “Rejected” and creates a new version with a status of “Draft.” In *Parts*, the content author can resume the approval process at step 4 to revise the content in the Draft version until the user in the content approval role agrees to publish the content.

Step 10 — On the Content Approval tab of a part, the program automatically saves each version of the part’s content. In *Parts*, the user in the content approval role can restore a part to its content from a past version from the Content Approval tab. When the user restores the version of a part, the program automatically creates a new version of the part with the restored content.

Content Approval Roles

You create multiple roles for users in the content approval process. Blackbaud suggests three main roles: Content Author, Content Approval, and Web Designer.

Content Author

Content authors are the users who create content for the Formatted Text and Images and Formatted Text and Images (Secured) parts on your website. In *Users & security*, you can select whether these users also have rights to manage workflow tasks. For information about these task rights, see Approval and Workflow Task Rights on page 45.

When a content author completes the design of a part, he submits it for approval by users in the Content Approval role. If the Content Author has rights to manage workflows, he can select whether to submit it to the users in the Content Approval role associated with the default workflow or those associated with another workflow.

Content Approval

In *Roles*, you must create roles for the users who review the content generated by Content Authors. You can create multiple Content Approval roles based on the content the users review. In *Task groups*, you select task rights to manage workflow tasks. You then use security assignments to associate the Content Approval roles with the Content Approval task groups to apply security for approvals. For information about these task rights, see Approval and Workflow Task Rights on page 45.

When you create a workflow in *Workflows*, you assign approval rights to roles. When the Content Author creates a part that uses the workflow, a user in the Content Approval role must review and approve the content before it appears on your website. The user selects whether to publish or reject the content of the part.

Web Designer

The Web Designer designs and creates the web pages and templates that contain the parts with the content created by the Content Authors and published by the users in the Content Approval role. In *Task groups*, you grant rights to manage workflows. You then use security assignments to associate the roles with the task group to apply security for workflows. For information about these task rights, see Approval and Workflow Task Rights on page 45.

Approval and Workflow Task Rights

When you create a workflow, you assign task rights to users by role. Before you create a workflow, you must create security in *Users & security* for the users who create and maintain the workflows. You can assign workflow task rights to users in another group, such as Content Approval. Under **Approval and Workflow Tasks**, select the checkbox for the task rights for users in the role group.

Note: To publish or reject content for a part in a workflow, the user must also have rights to edit the part. For information about how to assign Edit rights to a part, see the *Parts Guide*.

- **Full rights** – To allow users in the role full security rights in *Workflows*, *Approvals*, and on the Content Approval tab of parts, select this checkbox. Users assigned these rights can manage your content approval workflows, assign workflows to parts, and publish or reject parts in a workflow. For users assigned these rights, the **Workflow** field appears on the Content Approval tab.

Note: By default, users with Supervisor rights automatically have all Approval and Workflow related rights.

- **Approval workflow rights** – To allow users in the role to publish or reject parts in a workflow, but not assign or manage content approval workflows, select this checkbox. Users assigned these rights can access *Approvals* and select an approval status of "Publish" or "Reject" on the Content Approval tab of a part.
- **Assign workflow rights** – To allow users in the role to assign a workflow to a part from the Content Approval tab and manage content approval workflows in *Workflows*, but *not* publish or reject parts, select this checkbox. For users assigned these rights, the **Workflow** field appears on the Content Approval tab.

Manage Draft and Pending Parts

In *Approvals*, you can view and access all Formatted Text and Images and Formatted Text and Images (Secured) parts with the approval status of "Draft" or "Pending." You can also filter the grid to view parts by workflow or name.

▸ View or adjust the approval status of a part from Approvals

1. From *Site explorer*, click **Approvals**. *Approvals* appears.

2. To filter the grid, enter your criteria for the parts to view or adjust.
   - In the **Filter by Workflow** field, select the workflow of the part. To view all parts regardless of workflow, select "All."
   - In the **Filter by Name** field, enter the complete or partial name of the part.
3. Click **Filter**. The grid displays the draft parts that meet your criteria.
4. In the grid, the name, type, and owner of the part appear, along with the current approval status.

- An approval status of “Draft” indicates a user created the part but did not submit it for approval. For example, the user may still need to finish the design. “Draft” is the default approval status for newly created or updated Formatted Text and Images or Formatted Text and Images (Secured) parts.
- An approval status of “Pending” indicates a user designed the part and selected an approval status of “Ready for Approval” but that a user in the Content Approval role has not yet approved its content.

5. To adjust the approval status of a part, such as to submit it for approval or publish its content on your website, click **Click here to set the approval status for this version** under **Action**. The Edit Part screen appears. For information about how to edit the approval status on the Content Approval tab, see the *Parts Guide*.
6. To exit *Approvals*, navigate to another area of the program.

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