EKOHI CMS USER DOCUMENTATION
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Revision Information

The following information summarizes the version update information

<table>
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<tr>
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<th>Date</th>
<th>Change Description</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>03/18/2017</td>
<td>Initial Revision</td>
<td>Manasa Arukala</td>
</tr>
<tr>
<td>2.0</td>
<td>04/28/2017</td>
<td>Second Revision</td>
<td>Kiranmayi Thota, Manasa Arukala</td>
</tr>
</tbody>
</table>
Ekohi CMS BackOffice overview
Details of all the common terms and concepts that are used throughout the Ekohi CMS BackOffice.

Login Screen
When we go to the BackOffice for the first time, we are presented with the login screen.

Login url: [http://www.sfdr-cisd.org/ekohi](http://www.sfdr-cisd.org/ekohi)
Section

The **Section menu (Sidebar)** is the vertical menu located on the left side of the BackOffice.

A section in Ekohi CMS is where one can do specific tasks related to that section. For example content, settings, media. We can navigate between different sections of the BackOffice by clicking the corresponding icon in the section menu.
Trees

A tree is an hierarchical list of items related (and usually restricted) to a specific concept, which could be something like a content tree or a media tree. We can expand trees by clicking the down arrow ▼ to the left of the node.

The Content Tree

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**Node**

A node is an item in a tree. The images and folders in the Media section are shown as nodes in the Media tree, page and content in the Content tree and so forth.

**Dashboards**

A dashboard is the main view we are presented with when entering a section within the backoffice, and can be used to show valuable information to the users of the system.
Content

Content are the pages and content in the Content section. Each item in the tree is called a Node. Each node in the content tree exists out of different fields. Every content item (or Node) is defined by a Document Type.

Before a piece of content can be created it needs to be defined. That is why, when opening a blank installation of Ekohi CMS, it is not possible to create content in the Content section. All content needs a blueprint that holds information about what kind of data can be stored on the content node, which editors are used, how it is organized, where in the structure it is allowed and so forth. This blueprint or definition is called a Document Type.

Document Type

Document types define the types of pages/nodes that backoffice users can create in the content tree. Each document type contains different properties or fields. Each field has a specific data type e.g. text, number.

Properties

Every document type has properties. These are the fields that the content editor is allowed to edit for the node.

Data Type

A Data Type defines the type of input for a property. Each document type property has a data type which defines the type of input of that property. Data types reference a Property Editor and are configured in the Ekohi backoffice in the developer section. A Data Type can be something very simple (textstring, number, true/false,...) or more complex (multi node tree picker, image cropper, Grid Layout).
The Data type references a Property Editor and if the Property Editor has settings these are configured on the Data Type. This means we can have multiple Data Types referencing the same Property Editor.

An example of this could be to have two dropdown Data Types both referencing the same dropdown Property Editor. One configured to show a list of cities, the other a list of countries.

**Property Editors**

A property editor is a way to insert content into Ekohi CMS. An example of a property editor is the Rich Text Editor. It may be confused with Data Types. It’s possible to have many Rich Text Editor Data Types with different settings that all use the Rich Text Editor property editor.

Some important property editors to know

**Archetype:**

An Archetype Property editor wraps other installed property editors. By wrapping the other properties, Archetype allows for custom and repeatable fieldset mashups.

Ekohi CMS allows users to create archetype inside another archetype called [nested archetype](#).

**Rich Text Editor:**

The tiny editing control provides the user with a very familiar and standardized set of tools for managing content.
**Media**

Media items are used to store assets like images and video within the Media section and can be referenced from content.

**Introduction**

**Layout**

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As soon as we logged into the Ekohi CMS backoffice, we can see the above screen. As we can see it is divided into three sections 1) **Sidebar** 2) **A Corresponding menu** depending on which section of the sidebar we are in 3) and finally an **Editing section**

- **Sidebar** : We will see different options that we can choose from. Keep in mind that everybody will see different options, depending on what permissions they have been given. On my screen I have 10 options from Content to Approve it, these are basic sections that come with Ekohi CMS.so let’s go through them
  - The content section will be where we edit the content that is displayed on the website, so this will be where we spend most of our time.
  - The Media section allows us to upload images and video
  - The Settings section is aimed towards web designers that will work with things like style sheets and templates to change the appearance of the site. As a content editor we will not spend a lot of time in this section
  - The Members section allows us to see the accounts that people have made at our website.
  - The next sections we will not cover because they are meant for developers and administrators.
• **Content Menu**: As we can see on screen there's SFDR home button and if we click on the arrow we get a drop-down list. This drop down list is called the *content tree*. In the content tree we can either click on the page to display the editing section or we can click the three dots to get a list of options. If I click on home we can see that an editing section appears,
... but if I click the three dots an options list appears. It will automatically assume that we want to create another page but if we hit the “do something else” button we can see the full list of options.
- **Editing Section:** The editing section filled with different properties that all have different data types. There are different options to click on at the top of the editing section. These are called tabs, the same way a browser such as Google chrome, or Firefox can have different tabs.

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This is the section that one will find content we will be changing. Important parts of the Editing Section are the *preview* and *save and publish* buttons at the bottom of the screen.

- Preview allows us to see changes before they are published to the live site.
- While save and publish will save the website and publish it to a live site.
Creating Media

Media is handled the same way as content. Instead of defining Document Types one can define Media Types that act as the base for media items. Unlike with normal content there are a three default Media Types:

- Folder
- Image
- File

The **Folder** Media Type is a container for organizing media items in the media tree. The **Image** Media Type is used for uploading and storing images and the **File** Media Type is used to upload and store other files in the Media section. This means we don't have to define our own Media Types to start using the section. We've already got the tools for organizing and uploading media.

Creating a folder

It is always a good idea to start by creating a folder for Media items. Make sure to name folders in a way that makes it easy for editors to upload files and images in the right place.

To create a media folder go to the Media section and click the menu icon to the right of Media, alternatively one can right click the Media node and choose create. This will bring up the create dialogue. Pick the Folder, enter a name and press save.

Uploading images and files

There are a couple different ways to do this. We can use the context menu as when creating a folder. Click the menu icon next to the folder and choose Image or File, enter a name for media item and click the Choose File button.
An easier way to do it is to simply drag and drop the file to the upload area. Ekohi will automatically detect if it is an image or a file and create a media item in the folder. We can even drop entire folders (with subfolders) and the folder and file structure will be recreated. Alternatively we can click - or click here to choose files and get a standard OS file picker dialog.

The default **Image** Media Type has 5 properties that will be populated once the image is uploaded. These are **Upload Image**, **Width**, **Height**, **Size** and **Type** and can be viewed in the **Media** section and accessed in our templates.

**Organizing and editing media items**

The default view for the media section is a card view that lets preview the images and files.
We can select multiple media items and do bulk operations (delete/move) by clicking the image. To edit properties on a media item simply click the blue bar at the bottom of the item.

We can switch to a list view by clicking the view toggle next to the search field and selecting the list view.
Cropping the Images

If we select an image that has been uploaded to the folder we'll see the full image and the crops we have defined. Moving the blue focal point on the image will update the crops to focus accordingly. We can also edit the individual crops by selecting them and moving the image or adjust the slider to zoom.
Create Content

Options in Content Tree

We have various options in the Content Tree such as Create, Delete, move, rollback, reload, and audit trail...etc. Usually a content editor has access to Content and Media sections. To get the options menu to appear we go to our content tree and click the three dots then "do something else" as we can see that we have a limited list of options because of the permissions in this editor account the same way we only have the content option in the sidebar.

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Let's go through the options in this list, they are pretty self-explanatory but can be confusing:

- **Create** makes new pages
- **Delete** removes a page
- **Move** changes the level of a page
- **Copy** will duplicate a page
- **Sort** changes the order of the pages
- **Rollback** reverts back to a previous save point
- **Audit Trail** shows us what changes have been made on each page
- **Publish** displays the content on website.
- **Send To Publish** sends content to a publisher/admin
- **Notification** allows us to be notified when something changes
- **Send to Translation** sends new content to a translator if we have a multi-lingual site
- **Reload Nodes** allows us to essentially refresh the page.
Creating (or) Editing a page/new item

Let’s start off by creating a new page. The first thing to think about is where we want this new page to reside. If we want to create a level two page then I can right-click on the level 1/Home page and hit create, or hit the three dots.
Next we will be given a list of available document types to use. One can think of these document types as a template of pre-selected properties and data types.
Creating/Editing internal page

- Go to SFDR Home
- Choose the document type Internal Page.
- If we look at the properties tab we can see that the document type is specified.
- If we are unsure what document type to use look at other pages in the properties tab to see what was previously used.
- Now we can enter test information and hit save.
- If we preview our website, we can see that the new test page has been created.
We have 4 tabs in the internal page document type. Left Wing, Body, Right Wing and Special Right Wing. Let’s discuss in detail about each and every tab.

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Left Wing: The left section of the webpage.
We have several property editors in the Left wing section, let’s go through each and every property editor. 

**Include In Navigation:** One can’t see the page in Main navigation unless check the checkbox. 

**Example:**

![Property Editors in Left Wing Section]

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**Restrict Access:** if we enable this, the respective page will be showed only when user logged into the website.

**Show Left wing:** Check the show left wing check box to see the left wing section on the webpage.

**Left Wing Header:** Header for Left wing section

**Left Wing Links: Link** is an Archetype Property editor. It wraps other installed property editors. By wrapping the other properties, Archetype allows for custom and repeatable fieldset mashups.
In the above screen **Link** Archetype Property editor has 5 other Property editors,
**Page Link Name**: To specify the name to be displayed on Internal page link.
**Internal Page Link**: This is a content picker property editor where user can select the internal page from the content tree.
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If we click on the Add button we will get the list of internal pages from the content tree, we can choose either one of the page. Here I would like to select Departments Page for test purpose.
**External Link Name:** To specify the name to be displayed on External link.

**External Link:** This is a text string property editor where one can enter the url of a website.

Note: Do not forget to include `http://` or `https://` before website url, otherwise it will throw an error.
If we give both internal and external link then internal page link will be populated on the webpage. Always internal page link has priority. If we want to see the external link on webpage, remove the internal link and page link name(if specified so).
Restrict Access: if one check the restrict access check box then link will be showed only when member login into the website.

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As we can see Link archetype has two buttons initially, plus and power buttons. If we want to create more than one link we can click on plus(+) button.

Now we got another Link archetype, like this, we can create as many as we want to.

- will un publish the link.
- sorts the links.
- deletes the link.

**Contact Information:** Here we can enter person/office contact information and office hours. We can create multiple contacts by clicking + button.
Make sure to check the “Show contact info” check box to see the contact information on webpage. Similarly check the “show office hours on site?".
<table>
<thead>
<tr>
<th>Office Hours</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Tuesday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Wednesday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Thursday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Friday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Saturday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
<tr>
<td>Sunday</td>
<td>8:00 am - 5:00 pm</td>
</tr>
</tbody>
</table>
**Founding Member:** Here we can enter Founding member details, it is an archetype property editor and it has two property editors called designation and Founder Name, again Founder Name is an archetype property editor.

We can create multiple Founding members and one founding member can have multiple founder names since founder name is also an archetype property editor. And make sure to select “show founding members on site?” to display their information.
I have created two founding members, first founding member is CEO and he has one founder name called Test Founder 1. The second founding member is CFO and he has two founder names called Test Founder2, Test Founder 3.
Representatives Section: Here we can enter representative’s information. It has two property editors called Representative section header and Representative list. Representative list has header, sub header and Representative Property editors. Representative section can contain more than one representative list and a representative list can contain more than one Representatives. Make sure to check “Show representatives on site” to see representatives information.
Show Representatives on Site?

Representative Section

Representative Section Header

Representative List

Representative List Header

Representative List Sub Header

Representative List Representative

Representative Name

Designation

Representative
**Sponsor Logo Slider**: Here we can specify Sponsor's information, it has various property editors.

- **Slide Image**: it is a media picker property editor, we can choose logo/image of the sponsor form the media.
- **Slide Header Text**: it is a rich text editor property editor, we can give header text for Logo/Image.
- **Slide Description**: it is a rich text editor property editor, we can write description of the Logo/Image.
- **Display Order**: To specify the order of image.

Make sure to enable “Show sponsor logo slider?” to see slider on website.
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Body: The Middle section of the webpage.
We have several property editors in the Body section; let’s go through each and every property editor.

**Image:** It is a Media picker property editor, we can choose images from the media. The selected image will be banner of the page.
**Header Text:** Header for the banner.

**Enable Slider:** Check ‘Enable slider’ to see slider on website

**Slider Duration:** The time duration between slides

**Slider:**

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Media Name: Name of Image/video

Is Media type Internal?: Check if the media type is internal

Internal Media Link: To upload image or video

External Media Link: To specify the url of media

Include in site?: check to show the media on website

Restrict Access?: check to show media after user login

How to create slider?

Adding Internal Images

- Specify the image name/description in the Media Name field
- Check ‘is Media type internal?’
- Select the image by clicking internal media link field
- Check ‘include in site?’
- Hit save and publish
Adding Internal Videos

- Specify the video name/description in the Media Name field
- Check ‘is Media type internal?’
- Select the video by clicking ‘internal media link’ field
- Check ‘include in site?’
- Hit save and publish
<table>
<thead>
<tr>
<th>Media Name</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Media type Internal?</td>
<td>☑</td>
</tr>
<tr>
<td>Internal Media Link</td>
<td>![Internal Media Link](data:image/png;base64,iVBORw0KGgoAAAANSUhEUgAAAIAAAAD6CAIAAABXqQzZAAAABGdBTUEAALGPC/xhBQAAAxJREFU...]</td>
</tr>
<tr>
<td>External Media Link</td>
<td></td>
</tr>
<tr>
<td>Include in site?</td>
<td>☑</td>
</tr>
<tr>
<td>Restrict Access?</td>
<td>☑</td>
</tr>
</tbody>
</table>
Adding External Images

- specify the image name/description in the Media Name field
- give image url in external media link field
- check 'include in site?'
- Hit save and publish
Adding External Videos

- specify the video name/description in the Media Name field
- give video url in external media link field
- check 'include in site?'
- Hit save and publish
Creating Multiple slides

To create multiple slides simply click on the + button in ‘MediaCenter’ property editor.

Un publishing slides

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- If we don’t want to see a slide on website, we can unpublish it by clicking on power button.

- We can republish it by doing the same thing (click on power button)
- Hit save and publish

Deleting slides
- If we want to remove a slide, simply click on the X button.

- Hit save and publish
Content Description: this is a rich text property editor, we can enter the Content of page here.

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.
Show Message Board? : Message board will get displayed if we enable this check box.

Is Police Message Board? : enable this if it is a police message board.

Message Board Items: It is to create Message boards; we can create more than one message boards.

- Message Title: Title of the message board.
- Message Sub Title: Subtitle of the message board.
- Post Time: it is a date picker property editor, we can select a date here.
- Message Detail: Description of the message board.
- Message Priority: it has 3 distinct colors (Red, Green and White), we can choose either one based on priority.
- Police Message Priority: it has 2 distinct colors (Red and Green), we can choose either one based on priority.

<table>
<thead>
<tr>
<th>Message Board Items</th>
<th>Message Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Title</td>
<td>Test Message</td>
</tr>
<tr>
<td>Message Sub Title</td>
<td>Test Subtitle</td>
</tr>
<tr>
<td>Post Time</td>
<td>2017-03-17 15:55:43</td>
</tr>
</tbody>
</table>

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If we click on the View details link, we can see the message description.

This is test message description.
Right Wing: Right section of webpage.

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We have several property editors in the Right Wing section; let’s go through each and every property editor.

**Redirect Links:** It will navigate to document/ internal page link/ external link. Since it is an archetype property editor, we can create multiple redirect links.

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Redirect link has various property editors, let's discuss them.

- Display icon: it has list of icons, we can select the appropriate icon to our link.

![Redirect Link Property Editors](image)

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- **Document link name**: Name of the document to be displayed on document
- **Document Link**: we can pick the document from the media.
Page Link Name: To specify the name to be displayed on Internal page link.

Internal Page Link: This is a content picker property editor where user can select the internal page from the content tree.

External Link Name: To specify the name to be displayed on External link.

External Link: This is a text string property editor where one can enter the url of a website.

Note: Do not forget to include http:// or https:// before website url, otherwise it will throw an error.

We have already discussed Page link name, page link, external link name, external link and restrict access in the left wing section. (please refer left wing tab)

Note: if we specify all the links (document, internal and external links), only one link will be populated on the website.

Document links has highest priority, page link has second priority and then external link.
Show Right Wing: Right wing section will get displayed if we enable this check box.

Right Wing Header: Header for right wing section

Outer Links: These links will get displayed under the redirect links. An outer link can be document, internal page or external link. We can create more than one outer link.
Outer links have same property editors like redirect links except link description, where we can write about links.

**Folders:** Folder links are same as outer links but here we can place the links in a folder and restrict individual folders.
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**Show Upcoming events:** Enable this option to show the events on website.

**Upcoming Event List:** Here we can create events. It has several property editors where we can give Event name, description, date and color.
**Special Right Wing**: We will use this tab only in special cases (mostly for board meetings data). For example, if we want our data to be displayed in the following manner we can use this tab.
Note: Make sure to enable show special right wing to see the special right wing content.

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Creating/ Editing Hexagon Landing

- Go to the **SFDR Home** in the content tree
- Click on 3 dots then we will be able to see the available document types.
- Select Hexagon landing document type.
o we will get the following screen

![Image of Hexagon landing page]

- Give a name to Hexagon landing page
- Here I am giving **Test Hexagon Landing** for test purpose.
We have two tabs in the Test Hexagon Landing page.
- Design: Where one can design the page.
- Properties: It contains page information like Id, created by, creation date etc.
Let’s create test content in the Design tab
As we can see design tab has various property editors like Hex Home, Include in navigation and restrict access.

**Hex Home:**
- Here we can create multiple Media rows
- A media row can have multiple hexagons

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Include in navigation: Displays hexagons on website if enabled.
Restrict access: Only authorized members can login and see this page if enabled.

In the media row property editor
- We can select an image for media row background from the media.

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We can specify how many hexagons we want to have in each row by clicking up/down arrow or by typing the numeric value. (Note: maximum number of hexagons per row is 4)

We can create hexagons using media link property editor in Hexagon info.

Media link has various property editors:
- Media Name: The name which should be displayed on hexagon link
- Media URL: Background image for hexagon
- Media Desc: Description of the media
- Page Link Name: Name of the page link
- Internal page link: we can pick the internal page from the content editor where we want to navigate the link.
- External link name: name of the website
- External link: website url
- Document Link: Here we can pick the document from media
- Link Position: The position of the link on hexagon, we have three options here, top, center and bottom.
- Link color: we can choose the color of the link from the defined list
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I have created one hexagon, if we want to create more we can click on + button on media link property editor.

If we click on the + button we will have option to create another hexagon.
Creating multiple media rows:

Initially we will have option to create one media row, if we want to create multiple media rows, click on + button in Media row property editor.
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In the above example, I have given hexagons per row is 1, so I can create only one hexagon.

And I have given external link for hexagon and chose the link position to bottom and link color is blue.
Creating/Editing Page

Ekohi CMS allows users to create completely custom page layouts using any desired amount of rows and columns.

Here’s how one can get started creating custom page templates:

- Go to SFDR Home in the content tree
- Click on three dots (or) Right click-->Create
- Select Page Document type
• Give a name for page

Here I am naming my page as Test

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**Layouts**

A layout is the general grid "container", it contains one or more sections which content editors can use to insert pre-configured **rows**. There are 3 main usage scenarios of layouts:

1. a single column layout which to the content editor will act like a full page canvas to insert elements on
2. a two column layout with a main content body, and one or more sidebar columns to insert lists or other sidebar widgets on.
3. Two column Half n Half is same as two column layout, but, it splits the web page into two equal sections.

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• Choose a layout
• Here I am selecting 1 column layout

- This is how a 1 column grid will look like when editing. Here we can add different content elements that will build out page such as headers, articles, pictures etc., and we can add as many rows as we wish.

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Creating content in the layouts

Here I would like to take an example of **Full width Content** Element
• Click on add content
• One will get a pop up window with various property editors.

• Choose desired content type/property editor

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Every element has same property editors which include Embed, Headline1, Image, Macro, Quote and Rich text editor.

- **Embed**: It allows embedding third party media like YouTube, Vimeo..., outside of the rich text editor.

**Example:**

- Click on click to Embed
- Then we will get the following screen
- Enter the Media url in the URL field and click on Retrieve
• we will get the video as soon as we click on retrieve button
• we can also specify the height and width of the video
• click on submit
• Go to Metadata tab
• Check “Include in navigation” to see video on website.
• Click on Save/Save and Publish
• video has been embedded successfully.
- **Headline**: It allows us to write the headers.

  **Example:**

  ![Screenshot of a website interface with a text box for writing a headline.](image)

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• Write the header in Header Property editor

Test Header

Full Width Content

Add content

• Go to Metadata tab
• Check “Include in navigation”, to see Header on website.
• Click on Save/Save and Publish
• Header has been created successfully.

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- **Image:** This Property editor is used to insert the images in the content.
  
  **Example:**
  
  ![Click to insert image](image-url)
  
  - Click on “Click to Insert Image”
• Select the Image

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- Go to Metadata tab
- Check “Include in navigation”, to see Image on website.
- Click on Save/Save and Publish
- Image has been inserted successfully.
Macro: A macro is a reusable piece of functionality that one can re-use throughout the site.

Example:
• Click in click to insert macro
• Choose a macro from the dropdown list
• Here I have only one macro called insert form, so I am going to choose that.
• Click on submit
- Macro has inserted successfully
- Go to metadata tab
- Check “Include In Navigation?” to see macro on website.
- Click on Save/ Save and Publish
- macro has been rendered on website.
- **Quote**: A punctuation mark used to attribute the enclosed text to someone else.

**Example:**

![Quote example](image)

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• Write a quote in “Quote” property editor

  ![Full Width Content]
  
<table>
<thead>
<tr>
<th>Quote</th>
</tr>
</thead>
<tbody>
<tr>
<td>This is a test quote</td>
</tr>
</tbody>
</table>

• Go to metadata tab
  • Check “Include In Navigation?” to see quote on website.
  • Click on Save/ Save and Publish
  • Quote has been rendered on website.
- **Rich Text Editor**: The tiny editing control provides the user with a very familiar and standardized set of tools for managing content.

Some of the standard tools with which Ekohi CMS ships are shown below.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undo</td>
<td>Undoes changes.</td>
</tr>
<tr>
<td>Redo</td>
<td>Redo changes.</td>
</tr>
<tr>
<td>Cut</td>
<td>Cuts selected text and elements within the RTE.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies selected text and element within the RTE.</td>
</tr>
<tr>
<td>Paste</td>
<td>Pastes content from external programs such as Notepad or Word.</td>
</tr>
<tr>
<td>Bold</td>
<td>Makes selected text bold.</td>
</tr>
<tr>
<td>Italic</td>
<td>Makes selected text italic.</td>
</tr>
<tr>
<td>Unordered List</td>
<td>Creates a bulleted list.</td>
</tr>
<tr>
<td>Ordered List</td>
<td>Creates a numbered list.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Outdent</td>
<td>If a block of text or other elements has been indented, this button is active for you to remove indentation.</td>
</tr>
<tr>
<td>Indent</td>
<td>Indents blocks of content by 30 pixels.</td>
</tr>
<tr>
<td>Insert/Edit Link</td>
<td>Links selected text or elements to internal or external pages, or to media items (such as files).</td>
</tr>
<tr>
<td>Unlink</td>
<td>Removes the link from the selected text or elements.</td>
</tr>
</tbody>
</table>
| Insert/Edit Anchor | Inserts “jump-to” points within a long page.  
You use this in conjunction with Insert/edit link to enable a user to jump to a section by clicking a link in the page. |
| Insert/Edit Image | Insert an image from the media library or upload a new one.  
Figure 8-11 shows the associated dialog box for this feature. |
| Insert Macro     | Inserts custom-coded functionality in your RTE.  
The particular macro needs to have the Use in editor feature selected in order for it to appear in this list. |
| Insert Table     | Inserts an HTML `<table />` for formatting or tabular data.  
Figure 8-12 shows the associated dialog box for this feature. |
| Insert Custom Character | Inserts non-standard characters from a character table. |

Any content that we need to publish on website that has formatting (bold, italicize, bulleted lists, images, paragraphs, etc.), should be entered using the Ekohi CMS RTE data type.
Example:

- Write the content in Rich text editor

As I mentioned we can control the basics such as styling and alignment. When we hover over the menu it tells us what the options are. Most are self-explanatory such as alignment, bullets, indentation but there are a few options that require more info. The Formats dropdown will be filled with pre-set styles that the web-designers have set up.

- Apply the styles and formatting
The **insert/edit link** is very useful and links to other websites or files.

- If I select SFDR-CISD and press insert link I will get a side menu.
- I now add [www.sfdr-cisd.org](http://www.sfdr-cisd.org) to the URL box,
- Make sure to include the http:// or https://, otherwise it will think it is a level two page under root page.
- I will leave page title blank and choose my target to open the page in a new window or tab.
- Click on select
- website url has linked to SFDR-CISD Text
- Go to metadata tab
- check “Include in navigation” to display the content on website
- click on Save/Save and Publish
Creating/Editing Marquee

In order to create marquee in Ekohi CMS, we need to first create a Marquee repository.

Marquee Repository contains collection of marqueses.

How to create Marquee Repository?

- Go to Content tree
- Select Home Elements → click on 3 dots and select **Marquee Repository** Document type. (or) Right click on 3 dots → select create and then choose **Marquee Repository** Document type.
• Give a name to Marquee Repository
• Click on Save / Save and Publish

The Marquee Repository has been created successfully.

Now we have to create Marquee(s) in the Marquee Repository.

**How to create Marquee?**

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Go to Content tree
Select Home Elements → navigate to Marquee Repository (Test Marquee Repository)
Click on Create button → select Marquee

Enter a name for marquee
• In the Design tab we have various properties to fill in.
  o Marquee Text: This is where marquee text to be defined.
    It is a rich text editor property, we can apply different styles to our marquee text like color, font, size etc.
  o Scroll speed: The Scrolling speed of the marquee text, it is a numeric value (ex:10).
• Scroll Direction: In which direction marquee text should go, here we have two options in the dropdown box, right and left.

• Show on site?: check to display marquee on site.

• Show on Home Page?: check to display marquee on Home page.

• Display order: If we have multiple marquees in our Marquee repository then we can choose the display order of marquees.

• Click on Save / Save and Publish

The Marquee has been created successfully.
Featured News Repository

In this section we will know how to create, edit, delete, sort, un-publish and re-publish Featured news.

Creating/Editing Featured News Repository

A featured news repository comprises of Campus News and Announcements Links which are displayed in the home tab screen of the school website.

We use a featured news repository to add new content under campus news or announcements. If there is no Campus news or Announcements created earlier, we need to create new campus news/ Announcements.

To create Campus news/ Announcements under featured news repository,

Follow these steps-

Method 1-

- Click on the three dots next to the Home elements link in the content section under the school name.
- A screen is shown in the right with ‘create’ drop down button under ‘Child items’ tab.
- Click on Featured News Repository as highlighted.
Method 2 –

- Click on the 3 dots beside Home elements.
- A window is expanded with few options shown in the below image.
- Select School links as highlighted in the below image.
- A new screen is shown with fields to enter content regarding Campus news/ Announcements.
Method 3-
- Right click on the three dots beside home elements under the school name in the content section.
- Few options are expanded like create, delete, move etc. Click on ‘Create’.
- A window is expanded same as above image.
- Click on featured news repository.
Method 4-

- Click on the Home elements link in the content section under the school name.
- We can find Actions drop down button on the top right corner of the screen.
- Click ‘create’ to view extended screen. Refer below image.
- Select Featured News Repository as highlighted in below image.
- A new screen is displayed which allows us to enter content.

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Note* - Follow the above methods if there is no Featured News Repository created prior.

With the Featured News Repository selection, a new screen is displayed with two tabs- Settings and Properties.

In this selection we could either create content regarding Campus News or Announcements.

- **Settings** - This tab has two fields.
  - **Is An Announcement**? - Check this box if it is an announcement.
  - **Header Icon** - Select an icon related to Campus News/Announcements from the drop down list to display beside the heading.
Click ‘Save and Publish’. This will ensure that the campus news/announcements section is created.

The properties tab has properties related to the page. We usually do not change anything here.

After creating the campus News or announcements, the screen will look like this below image. The current screen will still allow us to create a new featured news repository.
Now, to view the newly/existing created announcements/campus news, click on the Home elements located under the school name to the left.

The below steps are the same for pre created Announcements/Campus news or the newly created Announcements/Campus news.

Steps to follow if the Featured News Repository is already created:
Adding Content-

If we want to add content to Campus News, click on Campus news. And create a featured news under ‘create’ tab.

Similarly if we want to add content to Announcements, click on Announcements shown in the below image. Create a featured news under ‘create’ tab.
The new screen after the click of create, looks like the image below.
There are three main tabs under this section. They are Introduction, News article, Properties.

**Introduction tab**

Let us consider the introduction tab to fill the fields. This tab shows the content as the teaser text. To view the content, user can click on the links displayed on the website. For the user to view those links and teaser text, we should add content under this introduction tab.

- **Is an Announcement?** – Check this if the content is an announcement.
- **Header Icon** - select a icon from the drop down box related to the news or announcements if any.
- **Header Text** - Give the heading related to the news/announcements.
- **Header Image** - Give an image related to the content.
- **Teaser Text**: Give few lines of the main content as teaser text.
- **Article External Link**: Give a URL link if this article is related to other website.
- **Show on Home Page**: Check this to show this article on main home screen.
- **Restrict Access?**: Check to show the link after member login.

Tab 2 - News Article-

News article follows a grid layout. With the grid layout, we could add content in

- 1 column layout
- 2 column layout (can divide screen into 40/60 part of screen width or 60/40 part of screen width)
- 2 column half n half (divides the content in the screen equally -50/50)

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Click ‘Save and Publish’ to publish the filled in details in the website.

**Tab 3- Properties**

The properties tab has properties related to the page. We usually do not change anything here.

**Website View**

Once all the content in the featured news repository is created and published, the website looks something like this.

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Note* - Only the fields filled in are displayed in the Website.
Deleting Featured news Repository-

Deleting featured news repository can be anything like deleting the Campus news/ Announcements completely or deleting few of the news articles inside campus news/ announcements.

Deleting a Campus News/Announcement/ few articles-

To delete few articles under campus news/ announcements, click on any one of the child item (campus news/ announcements) under home elements section.

For example, considering announcements.

- After clicking on the announcements (Hover over announcements to get underlined text), all the announcement articles under announcements are visible. Refer below image.
- Select any announcement article link by clicking on the image beside the name.
- Once clicked on any of the announcements, a tick mark appears beside the name replacing the logo-image.
• Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
• Select delete option. A confirmation dialog box appears.
• Click ‘ok’ to delete.
• Click on save and publish to apply changes.

Deleting all Campus News/ Announcements under Featured news Repository-

- Click on Home elements in the content section
- Select either announcements/ campus news by clicking on the logo-image beside the name.
- Once clicked on campus news/announcements a tick mark appears beside the name replacing the logo image.
- Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
- Select delete option. A confirmation dialog box appears.
- Click 'ok' to delete.
- Click on save and publish to apply changes.

Unpublishing a Featured News Repository-
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Unpublishing is always safe rather than deleting as, the content is always present in the EkoHi CMS but it would not be displayed in the website.

Unpublishing featured news repository can be anything like unpublishing the announcements/campus news completely or unpublishing few of the links inside program or quick links.

**Unpublishing Announcements/Campus News**-

- Click on Home elements in the content section
- Select either announcements/campus news by clicking on the logo-image beside the name.

- Once clicked on any of the featured news, a tick mark appears beside the name replacing the logo-image.
- Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
- Select Unpublish option. The news link is faded representing its unpublished.
- Click on save and publish to apply changes.

To republish the featured news links, click on the logo - image and select publish option. Click on save and publish to apply changes.

Unpublishing few news articles inside announcements/campus new sections-

To unpublish few articles under announcements/campus new, click on any one of the child item (announcements/campus news) under home elements section.

For example, considering announcements.

- Click on announcements. A new screen is displayed with all the announcements list.
- Select any announcement article by clicking on the logo-image beside the name.
- Once clicked, a tick mark appears beside the name replacing the logo- image.
- Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
- Select Unpublish option. The news link is faded representing its unpublished.
- Click on save and publish to apply changes.

To republish the articles back, click on the logo- image and select publish option. Click on save and publish to apply changes.

Sorting the Order of campus news/announcements displayed in website-

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To sort the order of campus news and announcements locations,

**Method 1-**

- Select Home elements. A new screen is displayed with the home elements list.
- Click on the actions drop down button located at top right corner.

- Select ‘Sort’. This expands a screen as shown below.
- In this screen click and drag the announcements or campus news to the targeted position.
- Click ‘save’ and then save and publish to apply changes.
Method 2 -

- Right click on the three dots beside Home Elements located under the school name in the content section.
- This click expands a screen with options like create, delete, sort.
- Select Sort as shown in the below image.
- A new window is popped as shown in above image.
- In this screen click and drag the announcements or campus news to the targeted position.
- Click ‘save’ and then save and publish to apply changes.
Note*- While sorting campus news and announcements, they both can interchange their position in the website. Featured news repository is designed to be displayed below calander only.

Though, the sorting allows us to move any of the featured news to any target location, the result is not displayed in the website.
Website view before sorting

Test

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Website view after sorting -
Upcoming Events

In this section we will know how to create, edit, delete, sort, un publish and re publish Upcoming Events.

Creating/Editing Upcoming Events

To add new events under upcoming events, we use upcoming events document type.

We can add upcoming events only to the district but not to schools.

Most of the times, we can find upcoming events already created under home elements.

If the upcoming events section is not created, follow these steps:

To create new upcoming events, there are four possible ways.

Method 1-
Click on the three dots next to the Home elements link in the content section under SFDR.
- A screen is extended to view options shown in above image.
- Select Upcoming Events document type as highlighted.
- A new screen is displayed which allows us to enter content.

Method 2-
- Right click on the three dots next to the Home elements link in the content section under SFDR.
- A screen is extended to the right with options like create, delete, move etc.
- Select create option as shown in image below.
- The same window as in above method is displayed. (Refer above image)
- Select Upcoming Events document type as highlighted.
- A new screen is displayed which allows us to enter content.
Method 3-

- Click on the Home elements link in the content section under SFDR.
- A new screen is displayed with two tabs – child items, Properties.
- Click on ‘create’ drop down button under ‘Child items’ tab.
- This drop down expands with few document types.
- Select Upcoming Events as highlighted in below image.
- A new screen is displayed which allows us to enter content.
Method 4-

- Click on the Home elements link in the content section under SFDR.
- We can find Actions drop down button on the top right corner of the screen.
- Click ‘create’ to view extended screen. Refer below image.
- Select Upcoming Events as highlighted in below image.
- A new screen is displayed which allows us to enter content.
If Upcoming events is created prior to this, we can add new events using the Upcoming event archetype property editor.

To do so, click on the upcoming events under the child items. The created upcoming events section can be seen in the below image.
In the new screen, Enter the heading Upcoming events (If not given/created earlier) Also, there are two tabs - Design, Properties.

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• **Upcoming Events List**: It is an archetype property editor. i.e., any number of calendar events could be created using this editor.
  - **Event Name**: Enter a name for the event.
  - **Event Description**: Give a description of what the event is about.
  - **Date and Time**: Select the event’s time and date.
  - **Date Color**: We can pick a color to the corresponding event. It is something like color-coded to that event.
• **Include in Navigation**: Check this to show all the events on the website. (Checking this is mandatory.)
• **Restrict Access?**: Check to show upcoming events after member login.
Property Tab-
- The properties tab has properties related to the page. We usually do not change anything here.

Click ‘Save and Publish’ to publish the filled in details in the website.

Website View-
Once all the content in the calendar is created and published, the website looks something like this.

Note*- Only the fields filled in are displayed in the Website.
Deleting event –

- To delete any event inside the upcoming events, there is a X symbol beside the upcoming event list archetype property editor.
- Click on X sign beside the event link to delete.
- A confirmation dialogue box appears. Click ‘Ok’.
- Click on save and publish to apply changes.

Deleting district Upcoming events from Home elements-
Deleting the upcoming events from home elements is restricted. Hence, it is not possible to delete upcoming events section.

Unpublishing an event-
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• To unpublish few events under upcoming events, click on home elements under content section in SFDR.
• Select upcoming events (hover on the words school upcoming events and click on it) under child items to view all the events listed.
• There is an ✪ power button beside the Upcoming event list archetype property editor.
• Click on the ✪ button related to the link to unpublish and the link is faded indicating that the link is unpublished.
• Click on save and publish to apply changes.

**Publishing back the unpublished events**-

• To republish the events, click on the ✪ power button beside the Calendar event archetype property editors again.
• This will republish the event back.

**Unpublishing All Upcoming Events**-

Un-publishing the upcoming events from home elements is restricted. Hence, it is not possible to Un-publish upcoming events section.

**Website view after deleting/un-publishing events**-

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How to Sort the events?

Change the order of the events displayed in the website-

- Select upcoming events to view the upcoming event list.
- If there are multiple events visible, we can reorder/sort the positions of the events displayed in the website.
- We can find symbol beside the upcoming event list archetype properties.
- Click on this symbol along side of the event to move.
- Click, hold and drag to a position we want to change it.
- This will reorder/sort the events visible on the website.
Website view after sorting
In this section we will know how to create, edit, delete, sort, un-publish and re-publish School Internal page.

**Creating/Editing School Internal Page**

To add a school internal page we need to create a new page and add content to the newly created page.

To select ‘create’ option, there are three different possible ways.

Method 1- Follow these steps-

- Click on the three dots next to the school name in the content section. A new window pops up, it is shown in the below image. (Fig: create school internal page)
- Click on the School internal page as highlighted.
Method 2–

- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image below). (Fig: create school internal page)
- This will expand few options like create, delete, edit. Select ‘create’ to pop up the same window as shown above.
- Click on the School internal page as highlighted.
Method 3-

- Right click on the three dots next to the school name in the content section. A new window pops up, it is shown in the below image.
- Select create and a new window pops up same as in the above 2 methods. (Can be viewed in the above image - Fig: create school internal page)
- Click on the School internal page as highlighted in the ‘create school internal page’ image.
With the school internal page selection, a new screen is displayed. It has three tabs- Page Info, Metadata and properties. 1ˢᵗ we need to fill the details in ‘Page Info’ tab. This tab allows the user to enter the content appropriately in given fields. It can be viewed in the image given below.
Fig: School Internal Page – Page Info tab (1)

Page Info Tab-

Filling the content-

There are fields which guide us how to fill content in this screen.

Step by step guidance is described below on how to fill the fields.

Heading for page- Enter a name for the internal page. (In the image -School Internal Page – Page Info tab(1) image, we can see it as ‘library’)

1) Banner Image- Give a image to display behind the heading for page.
2) **Header Text** - It is the heading for content.
3) **Page Text** - This field allows us to enter content description.

The page text field is a Rich Text Editor (RTE). It is a control where we can add large content. Its interface is similar to Microsoft word or Google docs. There are few useful features in the RTE where we could add URL web links, insert ‘media’ using ‘media picker’. Align and give styles to the content.

- **Insert/Edit URL Link** - It links a word or sentence to other websites, internal website pages or files.

As shown in the above pic, select the highlighted link symbol to add a URL link.

A new window pops up to the right side of the screen as shown below.
- Fill the field 'link to document' with the URL link. Make sure to include the https:// otherwise it will think it is a level two page under root page.
- The field 'Page Title' displays the name for the link as a title if hovered over the word or sentence which is linked.
- Choose 'Target' location from the three given options to open the link in that window or a new window.
- Click ‘Select’ after filling the fields. This will ensure to implement the changes made
  - **Media Picker**- This works the same way as our media picker data type.  
    - Set the cursor to a desired position where we want to add the image in the content section.  
    - Click the Media picker button (highlighted in the below image).
- A new window is displayed on the right. Select the media (can be image or document) we want from our media folder and click submit.
- We can also re-size the image and apply other style elements such as alignment, and even add hyperlinks to the image.

For more detail description about the media picker, follow the topic media picker property editor in the documentation

4) **Block Set**- It is an archetype property editor. (Refer the image -School Internal Page – Page Info tab(2))
“Archetype is an Ekohi CMS property editor that wraps other installed property editors. By wrapping the other properties, Archetype allows for custom and repeatable field set mashups.

As seen in below image, Block Set archetype has two buttons initially, plus and power buttons. If we want to create more than one Block Set we can click on plus (+) button.
Now, another Block Set archetype is expanded which allows us to fill details. This way, we can create as many as we want.

- Click on this button to un-publish the Block Set.
- Sorts the Block Set.
- Deletes the Block Set.

5) **Block Set Fields**

- **Header** - Give a heading for the content. Or a sub heading can be given to the content related to the page text field.
- **Image position Left?** - Check the box to display the ‘display image’ to be on left and the associated content related to the right.
- **Display Image** – Select an image related to the associated content to display.
- **Associated Text** - Add a descriptive text supporting image.

6) **Quote** - In this field we can add a Quote. (Refer the image - School Internal Page – Page Info tab(3))

7) **Quote By** - Give the name of the person or entity to whom the quote is ascribed to.
After filling the above fields, Click on ‘save and publish’, which is located at the bottom right corner. By doing so, this will publish the filled content.

**Metadata Tab**

Now, Click on the Metadata tab.

**Include in Navigation**- check the checkbox to create a tab for this school internal page in the main navigation.

**Note***- The content is displayed only if ‘include in navigation’ is checked.

Click on ‘save and Publish’.
Property Tab-
The properties tab has properties related to the page. We usually do not change anything here.
Few examples of a school internal page are library page, written art, language arts etc.

Website View-
Once all the content in the school internal page is created and published, the website looks something like this.

Note*- Only the fields filled in are displayed in the Website.
In the above picture, we could see that Library (Main Navigation) is included in the navigation as we checked the Include in Navigation check box.

Also, though the content under Library Resources and Research was added in RTE, it is displayed in 2 column due to the design structure.

Timings where added into block set.
Deleting School Internal Page—

We can delete an existing school internal page. Once deleted, the page can't be viewed anymore.

For example, let us consider deleting the Library Internal page.

To delete a page, there are two possible ways.
Method 1-

- Click on the internal page that we want to delete. (Here in the above image, library is selected.)
- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image above).
- This will expand few options like create, delete, edit. Select ‘delete’ to pop up a new window shown below.
- Click on ‘ok’ and the page is deleted.

Method 2-

- Right click on the three dots next to the school internal page we want to delete in the content section. A new window pops up with options like create, delete, edit. Select ‘delete’ to pop up a new window same as in above image.
- Click on ‘ok’ and the page is deleted.
Unpublishing a School Internal Page –

- Unpublish option is a safe option when compared to delete. Also, with more advantages.
- With delete option, the changes cannot be reverted back. But with unpublish, all the content is intact except that it is not visible in the website.

We cannot unpublish the school internal page directly with a button selection. But to restrict the view of this page, we could uncheck the ‘Include In Navigation’ check box in the Metadata tab.
By this step, the school internal page tab is removed. The content would still be present in the website as well as in Ekohi CMS.

**Change the order of the School Internal Pages displayed in the website**-

To arrange the order of the school internal page tabs in the website, we need to select ‘sort’ option in the ekohi CMS.

**Note** – Sorting can be done between School Internal pages, Page and School Staff. We shall discuss this sorting later in the documentation.

We can find sort in two different locations.
Method 1 -

- Select the school name in the content section.
- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image below).

- This will expand few options like create, delete, edit, sort, etc. Select ‘sort’ to pop up a new window shown below.
**Method 2**-

- Right click on the three dots next to the school name in the content section. A new window pops up with options like create, delete, edit, sort.

- Select ‘sort’ to pop up a new window same as in above image.

With this new window appearance, all the internal pages are shown with a sort order.

For example, in the above image, we can see two internal pages – Library (sorting order 2) and Written art (sorting order 3).

Let us rearrange these two internal pages.
- Select and drag library in between written arts and staff.
- Click 'save' button at the bottom.
- This it self rearranges the sorting order.

**Website View**

To view the above changes in the website, refresh the website after sorting is complete.

Before sorting website view:
After sorting website view-

Changing the content order inside the school internal pages-

The content is displayed in the website resembles the content exactly as we fill in the Ekohi CMS. We cannot reorder regular fields but, only content present in the Archetype property editors can be reordered.

To re-order the content present in the Archetype property editors, we can select ✨ beside the archetype property editors.
School Staff

In this section we will know how to create, edit, delete, sort, un publish and re publish School Staff.

Creating/Editing School Staff Page

To add a school staff page we need to create a new page and add content to the newly created page.

To select ‘create’ option, there are three different possible ways.

Method 1- Follow these steps-

- Click on the three dots next to the school name in the content section. A new window pops up, it is shown in the below image. (Fig: create school staff page)
- Click on the School staff page as highlighted.
Method 2 –

- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image below). (Fig: create school staff page)
- This will expand few options like create, delete, edit. Select ‘create’ to pop up the same window as shown below.
- Click on the School staff page as highlighted.

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Method 3-

- Right click on the three dots next to the school name in the content section. A new window pops up, it is shown in the below image.
- Select create and a new window pops up same as in the above 2 methods. (Can be viewed in the above image - Fig: create school staff page)
- Click on the School staff page as highlighted in the ‘create school staff page’ image.
With the school staff page selection, a new screen is displayed.
It has three tabs- Page Info, Metadata and properties. 1st we need to fill the details in ‘Page Info’ tab. This tab allows the user to enter the content appropriately in given fields. It can be viewed in the image given below

Filling the content- Page Info Tab:

There are fields on the left side in the CMS which guide us how to fill the content in this screen.

Step by step guidance is described below on how to fill the fields.

**Heading for page**- Enter a name for the internal page. (In the above image we can see it as ‘staff’)
  1) **Staff Banner** - Give a image for to display behind the header of the page.
  2) **Staff Header**- It is the heading for staff content.
  3) **Staff Description** – This rich text editor field allows us to enter content description.

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4) **Staff Info** - It is an archetype inside an archetype property editor.

“Archetype is an Ekohi CMS property editor that wraps other installed property editors. By wrapping the other properties, Archetype allows for custom and repeatable field set mashups.

As seen in the below image, Staff Info archetype has two buttons initially, plus and power buttons. If we want to create more than one Staff Info we can click on plus (++) button.

Now, another Staff Info archetype is expanded which allows us to fill details. This way, we can create as many staff members as we want.

- Click on this button to unpublish the Staff Info. (This will unpublish that particular staff info only.)
- Sorts the Staff Info.
- Deletes the Staff Info.
Staff Info Fields-

- **Staff List Header**
- **Staff List – Staff Member**- Staff Member is an archetype property editor.
  This means that now, we have archetype property editor inside the archetype property editor – nested archetype. (Staff Member inside Staff Info)
  - Because of the nested archetype we can add ‘n’ number of Staff members into Staff Info. Also, there could be any number of staff info.
  - To unpublish just a staff member, click on the power button beside staff member archetype.

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- ☀️ Sorts the Staff members.
- ✖️ deletes the Staff members.

**Staff Member Fields**

- **Name**: Enter the name of the staff member
- **Designation**: Select appropriate designation of the staff.
- **Head Shot**: Pick an image of the staff personal from the media folder.
- **Display Image**: Pick an image of the staff personal to display from the media folder.
- **Gender**: Select the gender of the staff (male/female).
- **Image Position**: Select front or back
- **Person description**: Give the personal description info if any.

Person description is a Rich Text Editor (RTE) property type. Its interface is similar to Microsoft word or Google docs. There are few useful features in the RTE where we could add URL web links, insert 'media' using 'media picker'. Align and give styles to the content.

- **Phone**: Add contact number
- **Email Address**: Give the email address.
- **Facebook Profile**: Give the URL of Facebook profile
- **Twitter Profile**: Give the URL of Twitter profile
- **LinkedIn Profile**: Give the URL of the LinkedIn profile

**5) Supporting Staff**

Supporting Staff is an archetype property editor.

We can add any number of supporting staff members with the help of archetype property editor.
- **Supporting Staff Fields**
  - **designation** - Select a designation appropriate for the staff
  - **Supporting Staff Info** - It is an archetype property editor.

This means that now we have archetype inside the archetype – nested archetype. (Supporting Staff Info inside Supporting Staff)

Because of the nested archetype we can add 'n' number of Staff Info into 'n' number of Staff members.

For example – All the assistant principals can be under one archetype. Similarly, all the secretaries can be clustered into other archetype.

This way, we can add each supporting staff into their respective designation archetype.

- **Supporting Staff Info fields**
  - **Name** - Enter the name of the supporting staff
  - **Email** - Give the email address of the staff.
  - **Phone** - Enter the phone number
  - **Description** - Give detailed description of the supporting staff if any.
  - **Facebook Profile** - Give the URL of the Facebook profile
  - **Twitter Profile** - Give the URL of the Twitter profile
Filling the content- Metadata-

Click on the Metadata tab.

Include in Navigation- check the checkbox to create a tab for this page in the main navigation.

Note*- The content is displayed only if ‘include in navigation’ is checked.

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Click on save and Publish.

The properties tab has properties related to the page. We usually do not change anything here.

**Website View**

Below 3 images show how the content is displayed on the website after publishing.

**Note**- Only the fields filled in are displayed in the Website.

In the below image, we could see that Staff (Main Navigation) is included in the navigation as we checked the Include in Navigation check box.

Only the fields filled in are displayed in the Website.
Deleting School Staff Page–

We can delete an existing school staff page. This option cannot be reverted back. Once deleted, the page cant be viewed anymore.

For example, let us consider deleting the staff page.

To do so, there are two possible ways.

Method 1-
- Click on the staff page that we want to delete.
- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image above).
- This will expand few options like create, delete, edit. Select ‘delete’ to pop up a new window shown below.
- Click on 'ok' and the page is deleted.
Method 2-

- Right click on the three dots next to the school staff page we want to delete in the content section. A new window pops up with options like create, delete, edit. Select ‘delete’ to pop up a new window same as shown in method 1 image.
- Click on ‘ok’ and the page is deleted.

Unpublishing a School Staff Page –

- Unpublish option is a safe option when compared to delete. Also, with more advantages.
• With delete option, the changes cannot be reverted back. But with unpublish, all the content is intact except that it is not visible in the website.

We cannot unpublish the school staff page directly with a button selection. But to restrict the view of this page, we could uncheck the 'Include In Navigation' check box in the Metadata tab.

By this step, the school staff page tab is removed. The content would still be present in the website as well as in Ekohi CMS.

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Website view after unpublishing/ Deleting School Staff Page-

As we can see, there is no staff tab visible in the main navigation.
Currently, the website looks empty because we did not add any content in the Home tab. But, we could see the internal pages visible as we have filled the content in those pages. Going further we will see how to add the content to the Home tab.

Change the content order inside School Staff page displayed inside the website-

The content is displayed in the website resembles the content exactly as we fill in the Ekohi CMS. We cannot reorder regular fields but, only content present in the Archetype property editors can be reordered.

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To re-order the content present in the Archetype property editors, we can select ✉️ beside the archetype property editors.

**Sorting**

In the actions drop down menu, there is an option called ‘sort’. This option can be implemented only for the main navigation items displayed on the website.

**Note** - It is advisable to have just 1 staff page any given school, rather than having 2 or more staff pages.

Hence, sorting cannot be implemented alone on a staff page.

We shall discuss the sorting under main navigation further in the document.
School Links

In this section we will know how to create, edit, delete, sort, un-publish and re-publish School Links.

Creating / Editing School Links

School Links comprises of Programs and Quick Links which are displayed in the home tab screen of the school website.

To add new school links, we need to create Programs/Quick links with the help of ‘School links’ document type under Home elements and add content to the newly created Links.

To create Programs/ quick links under school links,

Follow these steps-

Method 1-

- Click on the three dots next to the Home elements link under the school name in the content section.
- A screen is shown in the right with ‘create’ drop down button under ‘Child items’ tab.
- Click on the School links as highlighted.
Method 2-
- Click on the 3 dots beside Home elements
- A window is expanded with few options shown in the below image.
- Select School links as highlighted in the below image.
- A new screen is shown with fields to enter content regarding Programs/Quick Links.
Method 3-

- Right click on the three dots beside home elements under the school name in the content section.
- Few options are expanded like create, delete, move etc. Click on ‘Create’.
- A window is expanded same as above image.
- Click on featured news repository.
Method 4 -
- Click on the Home elements link in the content section under the school name.
- We can find Actions drop down button on the top right corner of the screen.
- Click ‘create’ to view extended screen. Refer below image.
- Select School Links as highlighted in below image.
- A new screen is displayed which allows us to enter content.
Note* - Follow the above methods if there are no programs/ quick links created prior to this.

With the School Links selection, a new screen is displayed to enter details in the fields for folders and school media links section. Follow the below steps to continue.

Steps to follow if the programs/ quick links are already created/ newly created-

- Click on the programs or Quick Links (Where ever the content needs to be added).

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- With the programs or quick links selection, a new screen is displayed to enter details in the fields for folders and school media links section.
- To add new links, Click on the (+) button at the end of the archetype where we wish to add the links.

Step By Step reference to fill the fields.
1. **School Media Links**- Unlike the folders, these links are displayed upfront. It is also a archetype property editor.

   - **Media Link2**- Each Media link comprises any of internal link, document or an external link.
- **Document Link Name**: Enter a document name only if the link is a document.
- **Document Link**: Select a document from media only if the link is a document.
- **Page Link Name**: Enter a Internal page name only if the link is internal page. (Here in the above images as we can see, the page link names and page links are given.)
- **Internal Page Link**: select an Internal page link only if the link is internal page.
- **External Link Name**: Enter a external page name only if the link is external page.
- **External Link**: Enter a external page URL only if the link is external page.
- **Link Description**: Give the description for the link if any.
- **Restrict Access**: Check to show this link only after member login.

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2. **Include In Page**- Check this to display the content in the website.

Click ‘Save and Publish’ to publish the filled in details in the website.

**Note***- Each link is displayed only if the name for the link is entered in the appropriate field.

If we enter all the three fields values (document, internal page, external page) in one medial link2, then document alone is displayed since it is given in the 1st field.
Deleting School Links-
Deleting schools links can be anything like deleting the programs/Quick links completely or deleting few of the links inside program or quick links.

Deleting Few links in the programs/quick links sections-
To delete few links under programs/Quick links, click on any one of the child item (programs/quick links) under home elements section.
For example, considering programs.

- After clicking on the programs, all the links under programs are visible. Refer below image.
- There is an X mark beside the medialink2 archetype property editors.
- Click on ‘X’ and a dialog box pops up asking for confirmation.
- Select ‘OK’ to delete the media link.
- Click on save and publish to apply changes.

**Note**- Once deleted, this cannot be reverted back.

**Deleting Programs/ Quick Links**-
- Click on Home elements in the content section
- Select either programs/ Quick links by clicking on the image beside the name or on the horizontal row.
- Once clicked on any of the links, a tick mark appears beside the name replacing the 'link' image.
- Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
- Select delete option. A confirmation dialog box appears.
- Click ‘ok’ to delete.
- Click on save and publish to apply changes.

**Unpublishing a School Link –**

Unpublishing school links can be anything like unpublishing the programs/Quick links completely or unpublishing few of the links inside program or quick links.

**Unpublishing Few links in the programs/quick links sections**

To unpublish few links under programs/Quick links, click on any one of the child item (programs/quick links) under home elements section.

For example, considering programs.

- After clicking on the programs, all the links under programs are visible. Refer below image.
- There is a power button beside the medialink2 archetype property editors.
- Click on the button and the link is faded indicating the link is unpublished.
- Click on save and publish to apply changes.

To publish these links back, click on the power button again. The link is highlighted again. This will republish the links.

**Unpublishing Programs/ Quick Links**

- Click on Home elements in the content section
- Select either programs/ Quick links by clicking on the icon image beside the name or on the horizontal row.

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- Once clicked on any of the links, a tick mark appears beside the name replacing the 'link' image.
- Along the tick mark, few other options are also displayed—Publish, Unpublish, Copy, Move and Delete.
- Select Unpublish option. The link is faded representing its unpublished.
- Click on save and publish to apply changes.

To republish the schools links, click on the 'link' image and select publish option. Click on save and publish to apply changes.
- Click on the Home elements under content section.
- Select Actions drop down button to expand few options like create, delete, move, sort etc.
- Click on sort. A new window is expanded which allows us to sort.
- Click on the programs. Drag and drop it below quick links. This itself will sort the school links.
- Click Save. Now click save and publish.
<table>
<thead>
<tr>
<th>Name</th>
<th>Creation date</th>
<th>Sort order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs</td>
<td>4/18/2017 10:27 AM</td>
<td>0</td>
</tr>
<tr>
<td>Quick Links</td>
<td>4/18/2017 11:44 AM</td>
<td>1</td>
</tr>
</tbody>
</table>

**Last Updated By:** Kirannaya Thota

**Created By:** Kirannaya Thota
Website view before and after sorting:

**Before sorting**

![Website view before sorting](image1)

**Test**

<table>
<thead>
<tr>
<th>Programs</th>
<th>Quick Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bilingual Academics</td>
<td>Attendance</td>
</tr>
<tr>
<td>Fine Arts</td>
<td>PE/Art/Music Schedule</td>
</tr>
<tr>
<td>Gifted and Talented</td>
<td>Library Schedule</td>
</tr>
<tr>
<td>Leader in Me</td>
<td>Lunch Schedule</td>
</tr>
<tr>
<td>Power Hour</td>
<td>Power Hour Schedule</td>
</tr>
</tbody>
</table>

**After sorting**

![Website view after sorting](image2)
After sorting-
Calendar Events

In this section we will know how to create, edit, delete, sort, un publish and re publish Calendar Events.

Creating/Editing Calendar Events

To add new events under calendar, we use calendar document type.

To create, there are four possible ways.

Follow these steps to create calendar events/upcoming events-

**Method 1** -

![Image of calendar creation process]

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- Click on the three dots next to the Home elements link in the content section under the school name.
- A screen is extended to view options shown in above image.
- Select Calendar document type as highlighted.
- A new screen is displayed which allows us to enter content.

**Method 2**-

- Right click on the three dots next to the Home elements link in the content section under the school name.
- A screen is extended to the right with options like create, delete, move etc.
- Select create option.
- The same window as in above method is displayed. (Refer above image)

- Select Calendar document type as highlighted.

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Method 3-
- Click on the Home elements link in the content section under the school name.
- A new screen is displayed with two tabs – child items, Properties.
- Click on ‘create’ drop down button under ‘Child items’ tab.

- This drop down expands with few document types.
- Select calendar as highlighted in below image.
- A new screen is displayed which allows us to enter content.
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Method 4-

- Click on the Home elements link in the content section under the school name.
- We can find Actions drop down button on the top right corner of the screen.

- Click ‘create’ to view extended screen. Refer below image.
- Select calendar as highlighted in below image.
- A new screen is displayed which allows us to enter content.
**Note** - Follow all the above methods only if there is no calendar created prior to this.

Follow these steps after creating calendar under home elements or a calendar preexists.

If a Calendar is created prior to this, we can add new events under the calendar section using the archetype property editor.

To do so, click on the school upcoming events under the child items. The created school upcoming events section can be seen in the below image.
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Now click on the school upcoming events to view the below image.

There are two tabs in this screen- Design, Properties.

**Adding Content in Design Tab—**

**Upcoming Events List**- It is a archetype property editor. i.e, any number of calendar events could be created using this editor.

- **Event Name**- Enter a name for the event.
- **Event Description**- Give a description of what the event is about.
- **All Day Event?-** Check this if the event lasts all day.
- **Event Start**- Select a event start time and date.
- **Event End**- Select a event end time and date.
- **Event Link**- We could add a link corresponding to the event. This link could be a document, internal page or an external page. Each link should be given with its respective link name.

- **Event Color**- We can pick a color to the corresponding event. It is something like color coded to that event.
- **Show on site**- Check this to show this calendar event on the website.
- **Restrict Access**?- Check to show event only after member login.
- **Include in Navigation**- Check this to show all the events on the website. (Checking this is mandatory.)
- **Restrict Access**?- Check to show upcoming events after member login.
Property Tab-
The properties tab has properties related to the page. We usually do not change anything here.

Click ‘Save and Publish’ to publish the filled in details in the website.

Website View-
Once all the content in the calendar is created and published, the website looks something like this.

Note*- Only the fields filled in are displayed in the Website.
• To delete any event inside the upcoming events/ calendar, there is a X symbol beside the Calender event archetype property editor.
• Click on the X beside the event link to delete.
• A confirmation dialogue box appears. Click ‘Ok’.
• Click on save and publish to apply changes.

Note*- Once deleted, this cannot be reverted back.

Deleting School Upcoming events from Home elements-

• Click on Home elements in the content section.
• Select School Upcoming events under child items by clicking on the icon- image beside the name or on the horizontal row.
• Once clicked on School Upcoming Events, a tick mark appears beside the name replacing the icon image.
• Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete on top.
• Select delete option. A confirmation dialog box appears.
• Click ‘ok’ to delete.
• Click on save and publish to apply changes.
How to Unpublish an event?

- To unpublish few events under school upcoming events, click on home elements under content section.
- Select School upcoming events (hover on the words school upcoming events and click on it) under child items to view all the events listed.
- There is a power button beside the Calendar event archetype property editors.
- Click on the button and the link is faded indicating the link is unpublished.
- Click on save and publish to apply changes.

Publishing back the unpublished events-

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To republish the events, click on the power button beside the Calendar event archetype property editors again. This will republish the event back.

**Unpublishing Calendar/ All School upcoming events**-

- Click on Home elements in the content section
- Select either school upcoming events by clicking on the logo-image beside the name. (Refer below image)
- Once clicked on any of the links, a tick mark appears beside the name replacing the logo-image.
- Along the tick mark, few other options are also displayed- Publish, Unpublish, Copy, Move and Delete.
- Select Unpublish option. The link is faded representing its unpublished.
- Click on save and publish to apply changes.
How to sort the Calendar events?

Change the order of the events displayed in the website-

- Select school upcoming links to view the calendar events.
- If there are multiple events visible, we can reorder/sort the positions of the events displayed in the website.
- We can find symbol beside the calendar events archetype properties.
- Click on this symbol along side the event to move.
- Click, hold and drag to a position that we want to change it.

Website view before sorting the calendar events-
Sorting School Upcoming events in Home elements-

The result of sorting the events inside upcoming events is visible in the website as we have seen in above situation.

But the result of sorting the School links with school upcoming events is not possible. Having said that, sorting can still be done in Ekahi CMS.
The school upcoming events are designed to be placed under the programs/quick links.

To sort the Home elements follow the same steps as sorting school links. That way we can sort the position of the school links and calendar events.

**School Folders**
In this section we will know how to create, (add multiple items in a folder, create multiple school folders) **edit**, **delete**, **un publish** and **republish** School Folders content.

**Creating/Editing School folders**
To create School folders, there are three different possible ways.

- Go to **Schools** in the content tree
- Select a school
- Select school home elements

**Method 1:**
- Click on the three dots next to the school home elements in the content section. A new window pops up, it is shown in the below image.
- Click on the School Folders as highlighted.
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Method 2:
- Click on the Actions drop down button which is located at the top right corner of the screen (can be viewed in the image below).
- This will expand few options like create, delete, edit. Select ‘create’ to pop up the same window as shown above.
- Click on the School Folders page as highlighted.
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Method 3:

- Right click on the three dots next to the school home elements in the content section. A new window pops up, it is shown in the below image.
- Select create and a new window pops up same as in the above 2 methods.
- Click on the School Folders as highlighted in the ‘create school folders’ image.
Document link name: Name of the document to be displayed on document

Document Link: we can pick the document from the media.

Page Link Name: To specify the name to be displayed on Internal page link.

Internal Page Link: This is a content picker property editor where user can select the internal page from the content tree.

External Link Name: To specify the name to be displayed on External link.

External Link: This is a text string property editor where we can enter the url of a website.

Note: Do not forget to include http:// or https:// before website url, otherwise it will throw an error.

Note: if we specify all the links(document, internal and external links) , only one link will be populated on the website.

Document links has highest priority, page link has second priority and then external link.

Link Description: Information of the link

How to add content to School folders?

Adding document:

- Give the document name in ‘Document Link Name’ property editor
- Select the document by clicking ‘Document Link’
- Click on 'include in page' to show on website
- Hit save and publish

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Adding internal page

- Give the page name in ‘Page Link Name’ property editor
- Select the internal page by clicking ‘Internal Page Link’

- Click on ‘include in page’ to show on website

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Hit save and publish
Adding external link

- Give the url name in ‘External Link Name’ property editor
- Give the url in ‘External Link’ property editor

- Click on ‘include in page’ to show on website
- Hit save and publish
How to create multiple items under one folder?

we can create as many links as we wish in a folder

Click on + sign in the ‘MediaLink2’ property editor
new link will be added under test folder

<table>
<thead>
<tr>
<th>Folders</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folder</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folder Name</td>
<td>Test Folder</td>
<td></td>
</tr>
<tr>
<td>Folder Links</td>
<td>MediaLink2</td>
<td></td>
</tr>
<tr>
<td>Restrict Access?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>show this after user login?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How to un publish a link?

If we don’t want to see a link on website we can hide it by un publishing

Click on the power button in the ‘MediaLink2’ property editor
Hit save and publish

MediaLink2 (Test2) will be disappear from the website

we can re publish content by clicking on same power button.

How to delete a link from folder?
If we don’t want to have a link in the folder , we can remove it by clicking on X sign.
Hit save and publish

**How to add multiple folders?**

We can create as many folders as we wish in the school folders document type

To do so, simply click on + sign in the **folders** property editor.
Hit save and publish
How to unpublish a folder?

Click on the power button in 'folder' property editor

It will unpublish the folder
Hit save and publish

**How to delete a folder?**

We can remove a folder by clicking on X sign.

Hit save and publish
Delete Content

How to delete a page / item?

Method 1:
- Right click on the page we wish to delete
- Select ‘delete’ option

![Image of a computer interface showing the delete option]

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• Then confirm that we want to delete the page in the dialog that gets shown and the page will be deleted.

Method 2:

• Go to a page we wish to delete
• on the top right part of the page we can find Actions dropdown
- Select 'delete' option

- Then confirm that we want to delete the page in the dialog that gets shown and the page will be deleted.
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How to restore a page?

If we decide that deleting a page was a massive mistake, then we still have hope. Like Windows, the pages we delete get sent to the Recycle Bin. Until we clear the bin, our deleted pages can still be restored. We can access the recycle bin from the navigation explorer.
In the recycle bin we can see a list of all the pages we have deleted.

To restore a page, find the page we wish to restore in the Trash
we can either do this manually or by using the search feature and click on it.
Method 1:

- In the 'Actions' dialog, in the top right-hand side of the page. Select the 'Restore' button and our web page will now be restored into Ekoji CMS.
Method 2:

- Right click on the page we wish to restore
- Click on restore button

On the left-hand properties panel, we will see a confirmation ‘Restore’ button, click it and our page will be back in our Ekahi CMS navigation explorer.
Undo Content

How to undo page changes?

Ekahi CMS will save a version of our page every time we make a change and save it. This version management is useful for several reasons:

- If we need to legally prove what content was displayed on our websites and on what dates
- If we made a mistake and need to revert the information to a previous version

Having version management means that we never have to worry about losing any of our changes, as all old versions of the page are saved to the history.

- Go to a page we wish to rollback
- Right click on the page and select rollback option (or) go to ‘actions’ in the top right corner of the page and select rollback
Then we will get the list of version information like below
• Choose the desired version

• Click on rollback

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Ex:

Below is my Test page, I want to rollback to a previous version
- I chose the version I wanted to rollback
- Click on rollback button
- click on close this window link
- reload the page
- Content has been successfully got rollback.
References

Internal References
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- SFDR Ekohi CMS Technical Design Document – Anil Anagam
- Medixsoft Ekohi Knowledge Base – Aravind Thatipamula

External References
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