

# Umbraco

## User Guide

A quick starter guide for administrators,  
editors, and content creators to begin  
using their Umbraco web site.

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Created by  **NimblePros™**

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## Logging In

1. In a Web browser, navigate to your site.
2. Add “/Umbraco/” to the end of your site’s URL. (e.g. <http://www.mysite.com/Umbraco/>)
3. Enter your username and password in the login form on the resulting page and click “Login”. (Fig. 1)
  - (If a new window does not open, turn off your browser’s pop-up blocker and click the “Restart Umbraco” link on your site.)

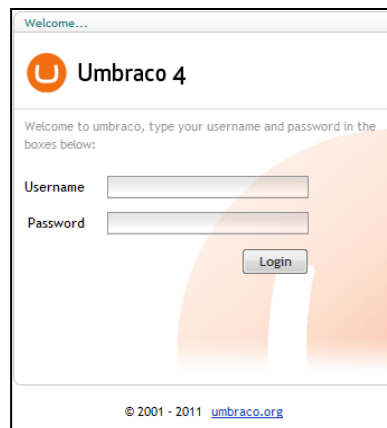


Figure 1: Login Screen

## Admin Panel

The Admin Panel (Fig. 2) is the interface through which edits to the site are made. It is made up of three panels: Sections, File Tree, and Editor.

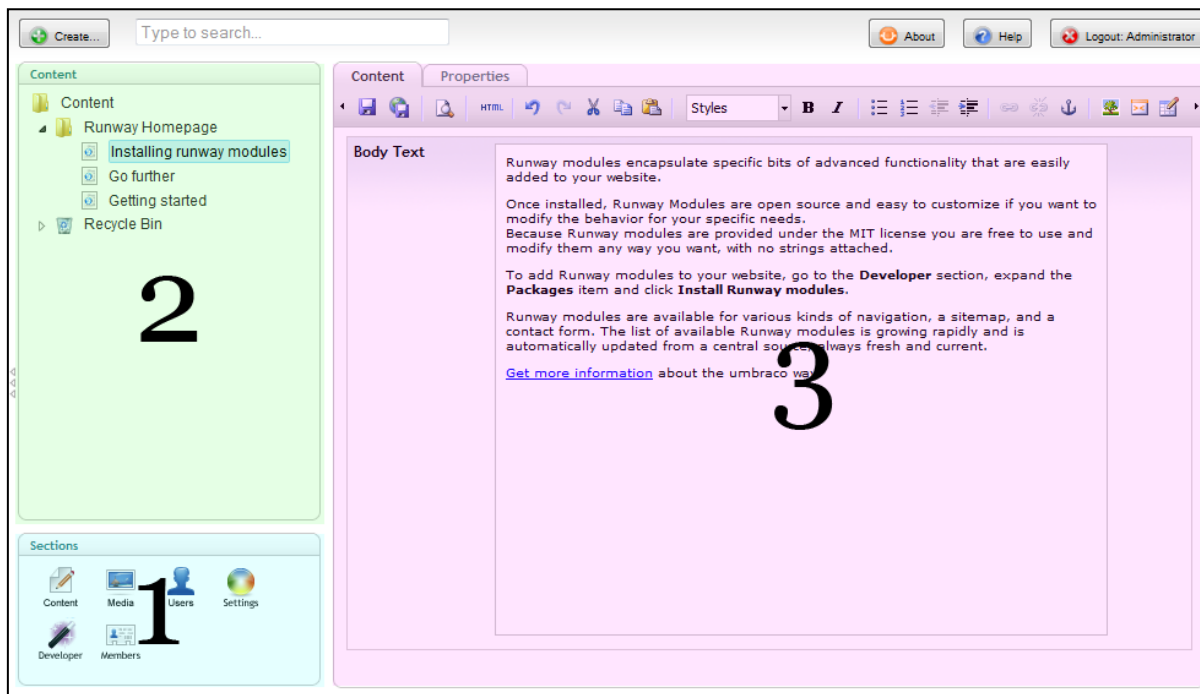


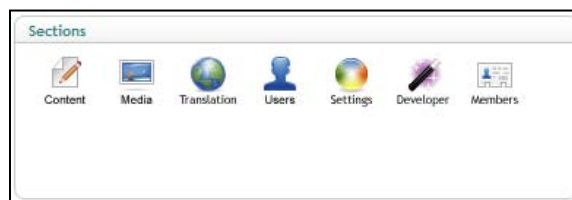
Figure 2: Admin Panel.  
1. Sections, 2. File Tree, 3. Editor

## Admin Panel (continued)

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### Sections

Sections (*Fig. 3*) can be accessed from the bottom left corner of the control panel. They include Content, Media, Users, Settings, Developer and Members. Depending on your user settings, you may not see all of these sections when logged in.



**Figure 3: Sections**  
L to R: Content, Media, Translation, Users, Settings, Developer, Members

The following three sections are the ones that you will most likely use:

**Content:** All editable pages and text visible on the site.

**Media:** Files used on the site (e.g. images and PDFs).

**Translation:** Allows portions of the site to be translated into other languages by assigned translators.

**Users:** Users are those who are able to login and edit the site. This section contains the passwords and permissions that designate which parts of the site each user is allowed to edit.

The following three sections are used by the designer/developer to affect the look and function of the site, and should be left alone (they may not appear in the Sections panel, depending on your user settings):

**Settings:** Settings involving the appearance of the site and the editable content within the Admin Panel.

**Developer:** The code and scripts that form the site.

**Members:** An Umbraco website can be built so that outside users can create profiles and access special features within the website (**not** including the Admin Panel). When a website has this functionality built in, the Members section contains information regarding member profiles.

## Admin Panel (continued)

### File Tree

The File Tree (*Fig. 4*) will show a different list of editable elements or pages depending on which Section is selected. When Content is selected, it will show a list of every page and element visible on the site. When Media is selected, it will show a list of all the media stored within Umbraco for the site. When Users is selected, it will show a list of all the users that have been created for the site.

To edit a specific element, click on the icon or text title of that element in the File Tree.

A folder icon indicates that the element or page has other elements or pages nested under it (nested elements or pages are referred to as *children*). To access *children* elements, click on the arrow to the left of the folder icon.

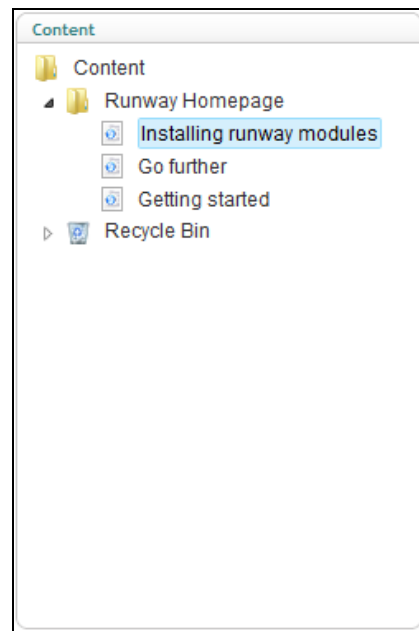


Figure 4: File Tree  
Content Section with all children visible.

### Editor

This panel is where all the edits are made, saved, and published. To edit an element, click on the corresponding icon or title in the File Tree and all of the editable content will open in the Editor.



Figure 5: Editor tabs (top left) and toolbar. Toolbar buttons (L to R):

Save, Save and publish, Preview, Edit HTML source, Undo, Redo, Cut, Copy, Paste, Styles menu, Bold, Italic, Unordered List, Ordered List, Outdent, Indent, Insert/edit link, Unlink, Insert/edit anchor, Insert/edit image, Insert macro, Insert a new table, Insert custom character

Each element has at least two standard tabs, Content and Properties, which are located at the top of the Editor panel. The Content tab will always appear first when an element is opened from the File Tree. **Do not edit anything in the Properties tab unless specifically instructed to do so.** An element that contains a large amount of editable information may have more than the two standard tabs. Be sure to check extra tabs if you are unable to locate the text you wish to edit.

The Editor menu is located directly beneath the tabs. Depending on what type of information is being edited, the menu will have three or more buttons. The first three buttons in this menu are the most important: Save, Save and publish, and Preview (*Fig. 6*).

## Admin Panel (continued)

**Save:** Use this button when edits have been made, but are not ready to be published on the site. **Changes are not saved automatically, so be sure to save before navigating to another element.**



Figure 6: Save, Save and publish, Preview

**Save and publish:** Use this button to publish edits to the site.

**Preview:** Use this button to preview edits before saving and/or publishing the site.

If the menu has more than three buttons then one or more of the editable elements (body text, usually) can be formatted. Many of them resemble and function like the buttons found in programs such as Microsoft Word. To apply formatting such as italics or bolding, highlight the text and click the desired formatting button.

The following buttons, and their functionalities, may be less familiar:

**Edit HTML source:** Use this button to view/edit the HTML code within editable elements.

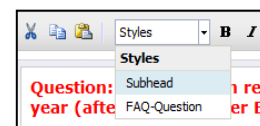


Figure 7: Styles menu with Subhead style selected

**Styles menu:** Text styles specific to a site's design can be found here. To use them, type/highlight the desired text and choose the desired style from the menu (Fig. 7).

**Insert/edit link:** Use this button to insert/edit links to pages in your site, anchors within pages in your site (*See below for information on anchors*), or links to other sites. When linking to another site, copy the site's URL (ex: <http://www.anothersite.com>) into the field labeled "Url" after clicking this button.

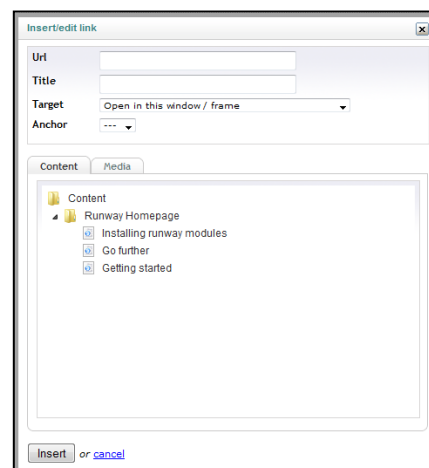


Figure 8: Insert/edit link window

**Insert/edit anchor:** An anchor is a link that points to a specific spot on a Web page, instead of the page as a whole. Use this button to insert/edit an anchor in the body text.

**Insert macro:** A macro is a sort of shortcut added by the site developer/designer that allows users to easily implement sophisticated elements such as a contact form or list of documents.

**Insert custom character:** Custom characters include currency symbols, foreign-language characters, and uncommon punctuation marks.

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## Admin Panel (continued)

Some segments of body text, called Simple Text, cannot be formatted using the toolbar. They will display a

mini toolbar that includes buttons for Bold, Italic, and Add hyperlink (Fig. 9).

To add a link in Simple Text, first type and highlight text that will be linked.

Click the "Link" button in the mini toolbar. Type or paste the URL (ex: [www.othersite.com](http://www.othersite.com)) into the field labeled "Enter URL for link here". Be sure to leave or replace the "http://" already present in the field. The resulting text should look like what is pictured in Fig. 10.

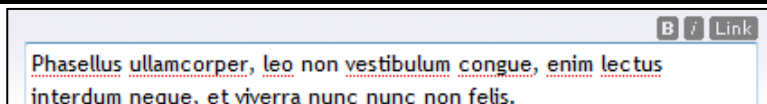


Figure 9: Textbox with mini toolbar

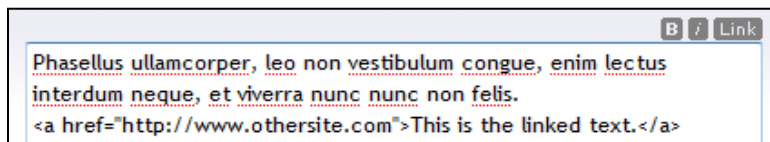


Figure 10: Linked Simple Text

## Create a New Page

1. With the Content section selected, right-click on "Runway Homepage" and choose the "Create" option. (Fig. 11)
2. Enter the name of the page as you want it to appear on the site.
3. Make sure that the "Textpage" option is chosen in the "Choose Document Type" drop-down menu.
4. Click "Create".
5. Enter the desired content and click "Save and publish".
6. After the page is published, it will immediately appear on the website with its own link in the site's navigation. (To see the page, navigate to the site in another browser window or refresh the window if you are already viewing the site.)

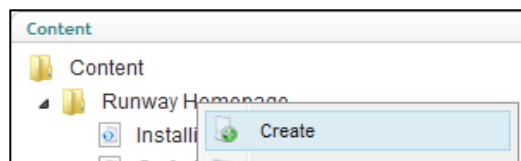


Figure 11: Create option

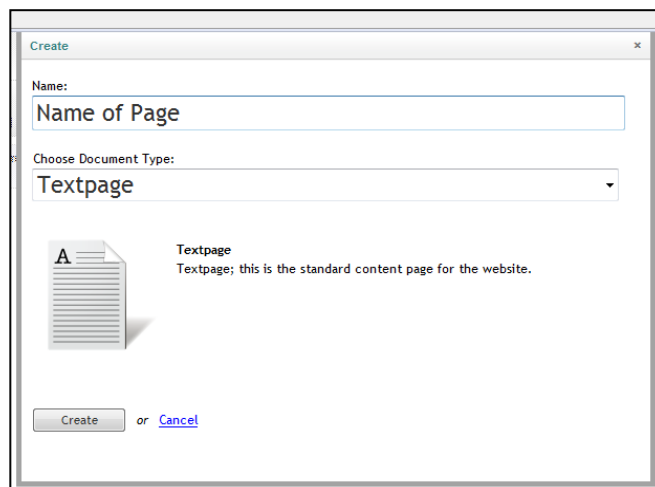


Figure 12: Create screen

**NOTE:** If you **do not** want the new page listed in the main site navigation, click the "Properties" tab at the top of the Editor panel and mark the "Hide in navigation" checkbox.

**IMPORTANT:** Because of the design of the site, only a limited number of pages will fit in the main navigation. Keep this in mind when adding new pages.

## Users

An Umbraco User is a username and password combination that allows an individual to log in to the site and make updates. Specific permissions can be set for each User to ensure that they edit the correct Sections and pages. Only Administrators are able to create and edit Users. **Users cannot be deleted once they are created, they can only be disabled** (Fig 13, Point D).

### Create a New User

1. Click the Users icon in the Sections panel.
2. Right-click on the top Users folder in the File Tree and select the "Create" option.
3. Enter a username and click the "Create" button.
4. In the Editor panel, click the "Change password" link and assign the user a password. (Fig. 13, Point A)
5. Enter the e-mail address of the individual, if applicable. (Fig. 13, Point B)
6. Set the User type (Fig. 13, Point C):
  - **Administrator:** Has the ability to do all tasks including setting User permissions.
  - **Writer:** Can make and save edits, but not publish them.
  - **Editor:** Can make, save and publish edits.
  - **[translator]:** Can make and save (but not publish) edits pertaining to translating the site into another language. (You will most likely never use this type.)
7. In the Sections box, select the Sections that this user will be able to see and edit. Content and Media are the most likely choices here. If the User type is set to Administrator, be sure to choose the Users Section as well. (Fig. 13, Point E)
8. Be sure to "Save" these changes before navigating elsewhere.

The screenshot shows the 'New User' form in Umbraco. The form is divided into several sections:

- Basic Information:** Username (New User), Login (New User), Password (New Password, Confirm new Password), Email, User type (Editor), Language (English (uk)).
- Start Node in Content:** Content (Delete, Choose...)
- Start Node in Media Library:** Media (Delete, Choose...)
- Permissions:** Redirect to canvas on login (checkbox), Disable Umbraco Access (checkbox), Disable User (checkbox).
- Sections:** Content (checked), Developer (checkbox), Media (checked), Members (checkbox), Settings (checkbox), Translation (checkbox), Users (checkbox).

Annotations A through E are placed on the form to highlight specific fields: A is next to the Password field, B is next to the Email field, C is next to the User type dropdown, D is next to the Disable User checkbox, and E is next to the Sections section.

Figure 13: New User form

## Users (continued)

### Setting User Permissions

Setting an individual user's permissions allows you to further restrict their actions by choosing which pages and elements they are allowed to edit.

1. Click the Users icon in the Sections panel.
2. Click the arrow to the left of the User permissions folder.
3. Select the User whose permissions you would like to set.
4. In the Editor panel, click

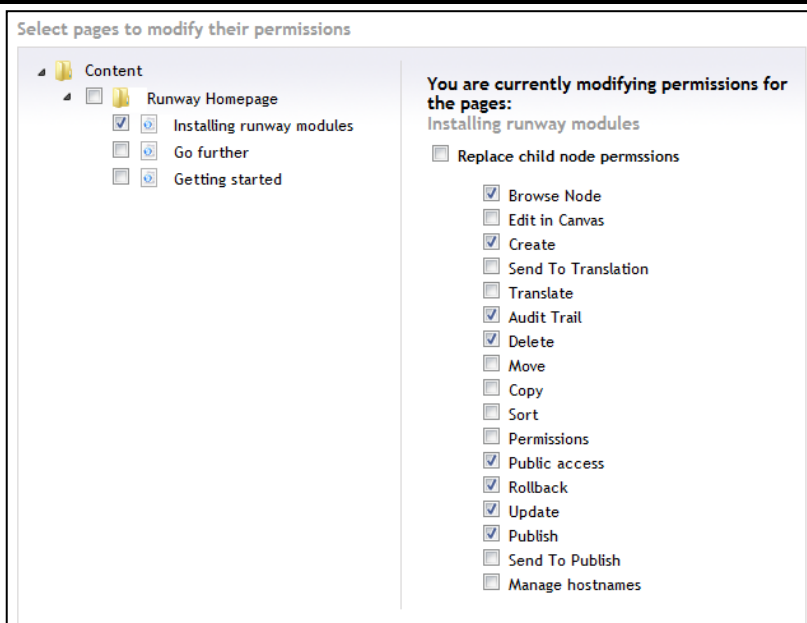


Figure 14: User permissions settings

the checkbox next to pages and/or elements to grant the User permission to them.

#### Notes:

- Editing the permissions for pages or elements that have children (pages/elements with children are denoted by the folder icon) will not automatically change the permissions for the children unless the "Replace child node permissions" option is selected.
  - If two or more pages/elements will have the same permission setting changes, you can edit them at the same time by selecting all of their checkboxes.
  - Settings can be changed later, but they cannot be rolled back (*See below for more information about rollback*).
  - Admin permissions cannot be edited.
5. Be sure to "Save" these changes before navigating elsewhere.

## Rollback (Undo)

If an unwanted edit has been published, it is possible to "rollback" that particular element or page. To do this:

1. Right-click on the desired element/ page in the File Tree.
2. Select the "Rollback" option (*Fig. 15*).
3. Choose a previous version of the element/page to Rollback to.
4. Click the Rollback button (or Cancel, if you do not want to Rollback after all).

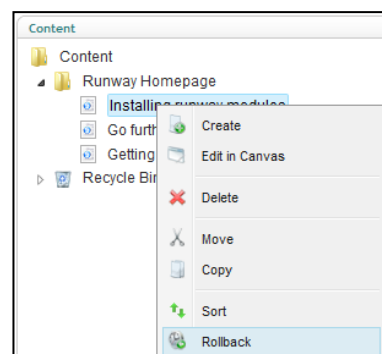


Figure 15: Rollback option