# Content Management System (CMS)

## An Overview

A content management system is additional software added to a web server to make the site easier to update by people with few or no HTML skills. This is accomplished by programming the software to fold together text, photos, video and other content with a design template that controls your particular "look" for the site.

Please note that while we use the word "template," this does not mean that the CMS system requires the use of a previously designed template sold to many people to be used over and over again. The use of a CMS is is independent from the design method. It can be accomplished by purchasing a template, or it can be created with a traditional, custom, back-and-forth design process. One reason we chose this particular CMS is that it gives designers incredible flexibility and does not limit the look of the site.

## An Open "Core"

The core of our CMS system is an open source software package called Umbraco. Umbraco has a large community of active users that provide peer-based support and write modules that extend the functionality of the core software. Many of these modules, although not all, are free to obtain and their only cost is associated with their installation.

Kreck Design can also provide add-on functionality to provide a structure ensuring consistent entry of content. For example, an event can be added to an events calendar by filling out a series of fields that define the event and flow into the display in a way that ensures each event is displayed consistently. For more information on this, view the "content types" section below.

Beyond simple structuring of information on the page, Umbraco fits in nicely with Kreck Design and 3rd party modules that provide functionality such as Blogs, Forums, Recipe Databases, and eCommerce.

## Upgrades

A downside of installing all CMS software is that it adds complexity to an otherwise more simple system. This additional software needs to be kept up to date and typically bug and security fixes come out several times a year. The time required for software maintenance is usually much less than what a typical company might pay for website content changes, but it does make sense to do some quick cost-benefit analysis to confirm a CMS is the correct solution for your needs.

## Administrative Access

The CMS is managed through a password protected user interface from any computer that is connected to the internet using your favorite web browser. This allows multiple people to use the system from their own desks, and it allows administrators to use it from work, home, and the road.

The system supports multiple users having different levels of access to the system. Users can have complete access, or they can be limited to certain types of actions or sections of the website. For example, it is possible to give a user complete access to update their department page but keep them from editing other pages of the website. It is also possible to ask a user to write articles, but not allow them to publish those articles to the live version of the site, thus allowing someone to review and approve the changes before they are posted.

A complete audit trail shows you what changes each user made and when they made them.

## Site Structure

Pages and entire website sections can be added, edited or removed as needed. As long as the website design can support additional items, additional content can be added to the site and pages can be renamed or even moved to other sections all within the CMS.

## Page Editing

Editing a page is very simple and straight-forward. You first find the page you wish to edit by looking in a tree of pages that exactly matches the navigation structure found in your website. To edit existing content simply change the text and either save a version or save the changes and publish it to the website.

An editing bar allows formatting without knowing HTML. Easy to use buttons allow for actions such as:

- Previewing the work
- Cut, Copy, and Paste
- Define a region to match a pre-defined style.
- Bold and Underline
- Inserting bullets, automatic numbering
- Adding links within your own website or to external websites
- Adding images, video, or other types of media

In the past, web designers were responsible for crafting every page of the site. The positive side of this was that the designer maintained a consistent look and feel, formatted the photos correctly and ensured professional formatting of the text. The downside was that the time required to accomplish the addition of a large number of pages could sometimes place the website project outside the reality of budget constraints. The content management system gives users a powerful tool to create a well fleshed out website and stay within budget, but it does place some responsibilities on our clients to tackle items we once accomplished for them.

## Page Properties

- Pages can be published to the website or removed at specified dates/times which allow you complete control over when you wish to place and remove content from your site.
- SEO Friendly… all the meta information commonly found on pages (keywords, description, etc.) to help the search engines is completely updateable and easy to change.
- The url of a page is something you can completely control, so the links to your pages will be in a human and search engine friendly format. There is no need to fear all your pages will be addressed using a cryptic number or random text. This is sometimes known as "friendly" or "pretty" URLs.
- You can instantly add a URL redirect to allow one link to instantly take the visitor to another section of your website.

## Version Management

The system supports multiple versions of each page. Previous versions of a page can be reviewed and they can be compared to the active page specifically showing what has changed. If desired, you can easily re-publish older versions.

## Multiple Languages

If you wish and have the resources to accomplish the translation(s), the CMS is setup to allow you to present content in other languages. The system will read the visitor's default language and present the site in the proper language. We can also include the ability for the visitor to manually switch to another language.

## Support

A wide range of support options are available when using Umbraco. Kreck Design offers a complete support package that includes answering questions about how to edit pages, updates of the CMS software to avoid exploits and perform bug fixes, and updates to your website to keep it looking good on new browsers.

In addition, there are a wide range of videos, documentation, and other options available as well. Should you choose this software, we will get you links to a wide range of support materials.

## Individual Page "Polish"

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## In Good Company

We are rarely ones to jump on the latest bandwagon, but at times it can be comforting that there are other companies large and small that are getting behind Umbraco.
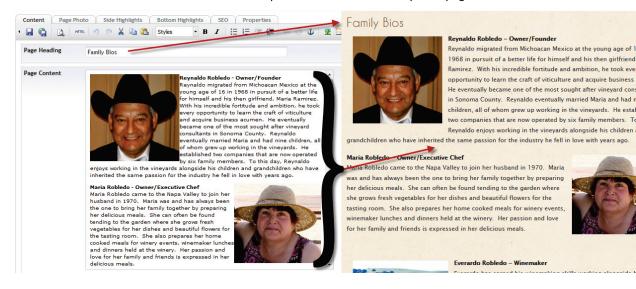
- Many major companies are using Umbraco. Examples of companies running Umbraco installations are: Wired Magazine, Peugeot, Heinz, SanDisk, Beverly Hills Conference and Visitors Bureau, Speedo, Fox, Vogue, and Microsoft.
- Umbraco is currently boasting over 110,000 active installations
- The software began in 2005 and has active development with the last major versions being released regularly

## Standard Content Type

Installed by default, the "standard" content type allows you to add practically an unlimited number of pages and accommodates almost anything. Think of this type as a blank word document... you can enter any type of information here from paragraphs of text, to bulleted lists... and even add photos and videos if you wish.

The content is not structured, but this freedom allows you to add content of any type. It is perfect for pages that are comprised of paragraphs of text.

Each layout can be a bit different, but the following screenshot shows how the entry of information in the large "content" area in the administrative interface maps to that content on the public page.

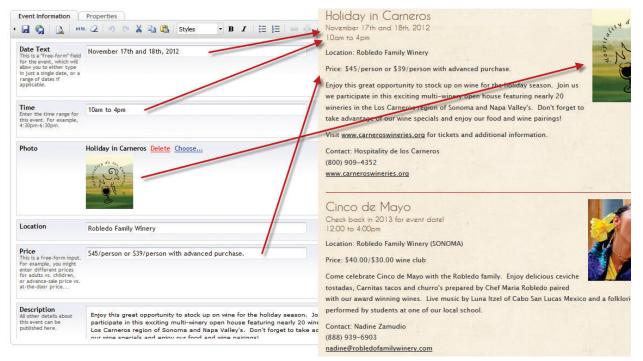# Special Content Types, Additional Layouts & Modules

All these terms really refer to a similar concept. The CMS allows for an unlimited number of fields in the administrative section of the CMS mapping to an unlimited number of layouts for this information. While there are really no limits to the number of different ways to present information, each one does require some time to create fields in the back-end, design the front-end, and map everything together. Thus, we often strive to limit the number of new layouts without giving the website a stifled, overly strict look and feel.

Kreck Design will setup each type of content/layout for you, but once done, you will be able to add an unlimited number of iterations of this content by simply filling out a form.

The fields in the form will map to a consistent look and feel as defined by the designer that works on your website. This allows you to keep each entry looking consistent and makes it much easier to add content without worrying about formatting.

These descriptions are primarily used to help illustrate how the various content types can be constructed. They can basically be any type of repeating pattern of fields that map to a specific layout of that information in a consistent fashion.

The following graphic illustrates how each field can map to an instance of that item on the page.



## Pre-Defined Modules

Many clients want to present very similar information and they do not object to having a similar layout to another business. We have created a series of modules that have the same fields and layout which can save money versus a custom installation. Custom layouts are always available as well.

When choosing the pre-defined module, the fonts will inherit the font treatments from the website, the spacing will inherit the basic formatting for the site and other aspects of the layout will adjust to look like the other elements of your site. We have examples of several different layouts for each of the modules listed if you would like to see visual examples. Additionally, we also occasionally have several options for a particular module.

## Accolades — CMS Module

Our accolades module allows our clients to add medals, write-ups, and other accolades to the website. These are often entered as a block of text, but the system also supports the addition of PDFs (and the linking to them in the display) to provide more detailed documents.

This module is often integrated to the shopping cart to allow for the accolades to be tied to a specific wine and thus appear on the individual product pages as well as a consolidated accolades page.

An accolade can be applied to one or more wines, to all the wines or to none of the wines. Magazine logos or other images can be attached to the item to be used in the presentation of the accolade.

A half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## Blog - CMS Module

The blog module provides the features commonly associated with a 'blog' on your own website with the same look and feel of your website under your own domain name, just as the rest of the CMS modules. The reason we mention this is that many people are used to blogs that exist on separate platforms such as Typepad or Blogger. Please contact us if you would like to review any of the positives and negatives between hosting the blog on your own website versus hosting it on an outside platform.

Our blog software is completely administered through the same user interface as the other services on the website and they share a common interface. The features include the posting of comments and photos, posted and organized by date. The most recent entry is published at the top, with older items archived and accessible to your visitors through an easy listing.

Visitor comments are also supported with complete moderation so you can allow appropriate feedback while controlling automated bots that post spam or other inappropriate content.

One half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## Distributor Listing - CMS Module

This portion of the bid covers the ability to post distributors a page complete with address and contact information.

These items are managed through the Kreck Design Administration website, and can be easily added, edited, or deleted. Listings can be easily sorted and placed into categories by state or region. Although the display can be customized, the page is often designed with expanding/collapsing regions to not overwhelm the visitor.

A half-hour of training is included with this module which is sufficient for most of our clients. Additional training is always available if desired.

## Document Manager - CMS Module

This is a module of the CMS system that allows for the organization of files and their display on a website so they can be easily searched and downloaded by site visitors. Examples include:

♦ A board of directors wants to share documents rather than print and mail board packets.
♦ The PR department would like to provide large photos suitable for printing to the media.
♦ A winery wishes to provide PDF files to the sales force that contain labels, shelf talkers, or other point of sale materials.

The document manager collects information about the file such as the title for display purposes and allows for the categorization of the files. This categorization will be used in the display of the files. This type of module is extremely similar to modules such as the 'trade materials' module. Depending upon your specific needs, we will adjust the installation to provide you the solution you need.

Please note, this application does not create these documents but allows you to upload them, organize them, and post them to your website. If you need help creating PDFs or other documents, we can provide you a bid to help you with this.

One half-hour of training is included with this module which is sufficient for most of our clients. Additional training is always available if desired.

## EVENTS – CMS MODULE

Our events CMS module allows you to enter all the details that describe the events found on your website. These events may be displayed on a single page or displayed as a single index page with links to an individual page for each event. Common fields include event titles, descriptions, links to further resources or links to an online store to purchase tickets.

Customizations are always available including the ability to display all events from one category (such as events only at the tasting room) on one section of your site or perhaps always display the next upcoming event on your home page.

Once an event has passed, it will automatically be removed from the pages so you never have to worry about old events making your site look neglected.

A half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## EVENTS WITH MODERATION – CMS MODULE

Our events CMS module allows you to enter all the details that describe the events found on your website. These events may be displayed on a single page or displayed as a single index page with links to an individual page for each event. Common fields include event titles, descriptions, links to further resources or links to an online store to purchase tickets.

Customizations are always available including the ability to display all events from one category (such as events only at the tasting room) on one section of your site or perhaps always display the next upcoming event on your home page.

The event calendar allows for the presentation of a large number of events, their categorization, and sorting and filtering in several methods. Visitors can scroll forward and backwards though the calendar. For example, it is possible to view all events with a certain tag(s) (i.e.: wine and art) between two dates.

Additionally, there is a public form that allows the community to post events to add to the calendar. The event is collected and fields carefully monitored to ensure data is entered in a consistent format. Once the event is submitted, it is sent to a moderator that can approve or deny the event with simple links in an email. Editing the event is always available as well.

One hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## FAQ – CMS MODULE

FAQ is the common acronym for "Frequently Asked Questions." This module is simple in nature but it is designed to allow you to easily post a series of questions and answers. It is possible to categorize the questions into headers to make finding them easier. The time here allows us to design how the display of the questions/answer pairs will be presented to the visitor.

Examples include expanding/contracting regions, simple lists, and pop-ups to keep the initial page from getting too long or cluttered.

A half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## Job Postings - CMS Module

This simple yet useful tool will allow you to post open employment positions to your website. The backend of this application allows you to create a job posting by simply filling out a web form. The positions can be categorized in any way you wish. You can have the position run for an indefinite period of time or have it drop of the website on a specific remove date.

The display end of this application allows the visitor to view the open positions by category, or as a simple list. Drilling down will take the visitor to a single page that gives complete details about the available position.

This application can tie in closely with the Online Application Tool although such integration is not required.

A half-hour of training is included with this module which is sufficient for most of our clients. Additional training is always available if desired.

## Lodging Listing - CMS Module

This section covers the ability to for staff to easily enter an unlimited number of lodgings and their presentation on the website using a consistent layout. The layout will be designed during the design process and the exact fields used to represent the lodging (name, description, address, etc.) can be refined at a later date without changing the scope of the project.

This module will consist of the framework and design to display the lodgings in a consistent layout. Editing is accomplished through the common administrative back-end, and would consist of the simply filling out the 6-8 fields that describe the lodging.

A half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## News / Press Release - CMS Module

Our News & Press Release module allows you to quickly and easily post newsworthy items to your site such as current events, awards, new products, or even just your thoughts.

The module can always sort new postings to the top of the page, or you can order the postings as you wish. The postings can be contained on a single page or be tailored to be automatically moved to an 'archived' page after a certain time period or number of posted articles.

This module is often setup very much like a traditional 'blog' module.

A half-hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired.

## Photo Gallery - CMS Module

Our self-updateable photo gallery provides a suite of tools to add, edit, and remove the photographs presented in the gallery.

Common tasks include the ability to create multiple galleries of photographs, to change how they are organized and edit captions.

The display of the photographs will include an index page that shows the available galleries, the presentation of thumbnails, and the viewing of a photo at full size with the ability to scroll forward and backwards.

One hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired. It is generally a good idea if the person managing this section is familiar with basic photo editing for the web, but if they are not we are happy to train the person to whatever degree necessary.

## Recipes - CMS Module

The recipe module allows you to enter recipes and display them on the website. The module allows for the creation and management of an unlimited number of recipes assigned to an unlimited number of categories.

Recipes can have any number of sub steps… for example a single recipe for "Mom's Apple Pie" can include separate sections for the topping, the filling, and the crust.

The display of the recipes can be in a single list, or they can be organized by category. Additionally, the recipes can be searched by keywords to return a certain recipe by ingredient type or any other desired keyword.

One hour of training is included with this module which is sufficient for most of our clients. Additional training is always available if desired.

## RSS Feeds - CMS Module

This section covers our RSS management tool. The use of RSS is another method of distributing your content. Similar to a visitor that subscribes to receiving emails containing new information, a visitor may subscribe to a 'feed' via RSS or 'Really Simple Syndication'. By using a tool tailored to this purpose (there are many), the visitor can automatically receive the content you wish to distribute.

Kreck design will help you establish each new feed on your website, but the RSS Manager can handle any number of feeds.

Once a feed is created, our RSS manager allows you to post items to your RSS feed, manage how long they will stay on the feed and when they will be posted to the feed. The content you enter is automatically properly formatted in the proper XML format so there is no need to learn any code.

One hour of training is included with this module which is sufficient for most of our clients. Additional training is always available if desired.

## Trade Materials - CMS Module

Primarily targeted to the media and wholesale sales staff, a trade materials database can provide great value in distributing your materials at practically zero cost per unit. This section covers the display of trade materials to the site's visitors and the back-end administrative to allow your staff to make quick and easy additions, modifications and deletions.

The common items are:

♦ News articles (including awards and write-ups)
♦ Point of Sale Materials such as Neckers and Shelf Talkers
♦ Tasting Notes
♦ Sell Sheets
♦ Press Kits

Typically, the items entered into this application are PDFs, MS Word documents and photographs, but any type of file should work. Please note, this application does not create these documents but allows you to upload them, organize them, and post them to your website. If you need help creating PDFs or other documents, we can provide you a bid to help you with this.

When items are entered into the web-based administrative interface, they are posted to the website in the appropriate areas. Any older items are properly archived for trade access while keeping the 'current' section clean of clutter.

This module is commonly integrated with the shopping cart. Items can be associated to individual products, so that you can link back to a product detail page or they can be associated with the company in a general sense. For example, a press kit is typically not associated with a specific product but with the company in general.

## Video Gallery - CMS Module

Our self-updatable video gallery provides a suite of tools to add, edit, and remove the videos presented in the gallery.

Common tasks include the ability to create categories of videos, include video titles, and post video embed code from a wide variety of outside video services such as YouTube and Vimeo.

This module does not provide video conversion function to other formats or the serving of video from your ISP, but it does facility the organization and presentation of video from these common sources on your own site. This method is often superior to hosting the video on your own ISP as many ISPs are not setup and designed to serve video content.

One hour of training is included in the installation time which is sufficient for most people. We can always provide more training as desired. It is generally a good idea if the person managing this section is somewhat familiar with web video, but if they are not we are happy to train the person to whatever degree necessary.

## Custom Modules

We regularly make custom modules to meet a client's specific needs. Your particular project may similar enough that is constitutes a small modification or layout change from one of the above modules, or it might be more involved.

When providing a proposal for a custom module, we can often provide a fixed bid, but at times the number of variables and unknowns return a range so large that a 'discovery' phase would best. Please let us know your thoughts and we've be happy to analyze the next steps!