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Umbraco User's Guide

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Introduction

Part I

Creating Your First Site with Umbraco

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Chapter 1

Installing for the First Time

- What are the steps for installing Umbraco?
- How do you upgrade your current site?
- Which Umbraco starter kit should you use and how do you install it?
- How do you apply and manipulate Umbraco skins?
- How do you find and install Umbraco modules?

Users have installed Umbraco literally hundreds of thousands of times in a variety of environments — everywhere from an entry-level Windows XP machine, to multiserver load-balanced sites, and even to Microsoft Windows Azure. In the vast majority of these cases the installations complete successfully and take no more than a few minutes. The first section of this chapter contains the Umbraco quick start instructions for facilitating a successful install. Read it, install Umbraco, and then continue reading for additional considerations.

You can always find the latest released version of Umbraco on the Umbraco CodePlex home at http://umbraco.codeplex.com/ from the Downloads tab. The latest version of Umbraco is also available via Microsoft's Web Platform Installer and Web Application Gallery (http://www.microsoft.com/web/gallery/umbraco/). This chapter offers a detailed overview for installing Umbraco with both the Microsoft Web Platform Installer and directly from the Umbraco installation file downloaded from the Umbraco CodePlex home.

Installing Umbraco

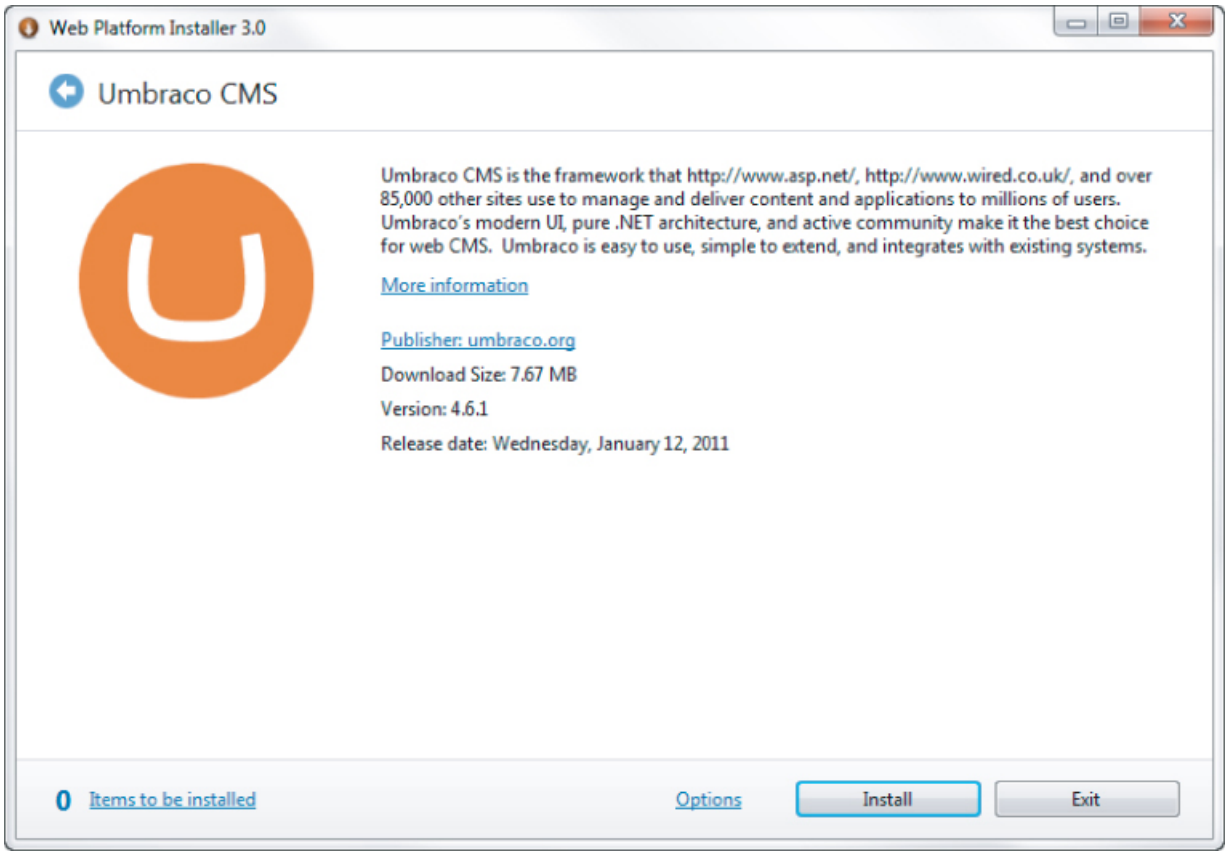
The text in this chapter, as well as the rest of the book, assumes that you have a PC running Windows Vista or Windows 7 and have user permissions sufficient enough to allow for administrative actions. If this is not the case, or if you are installing to a different environment (such as to a shared-hosting account) skip this section for now and refer to Chapter 14, which has troubleshooting tips. One important item to note is that Umbraco is best installed as a website root rather than as a virtual directory under a web root, so plan on running Umbraco from a web root. All current versions of Internet Information Server (IIS) support multiple web roots so running from a web root is not an issue unless you are using IIS5 on Windows XP. See Chapter 14 if this is the case.

Installing Umbraco using the Microsoft Web Platform Installer

The best way to begin your Umbraco installation is by using the Microsoft Web Platform Installer (a free installation tool developed and supported by Microsoft). Some advantages to using the Microsoft Web Platform Installer (shown in Figure 1.1) are that the tool can:

- Automatically detect and install required dependencies.
- Create a Microsoft SQL database or Microsoft SQL CE database prior to installing Umbraco.
- Create and configure new websites in IIS.

Figure 1.1



You can find the Microsoft Web Platform Installer at www.microsoft.com/web/ along with the latest versions of Umbraco and other web applications as well as any required dependencies. In addition, the Microsoft Web Platform Installer is available as an IIS extension at www.iis.net/extensions/WebPI/ and is integrated into web hosting control panels such as cPanel and DotNetPanel. Using a web host's control panel to install Umbraco in a shared hosting environment can greatly simplify the installation process.

Use the following steps to install Umbraco with the Web Platform Installer:

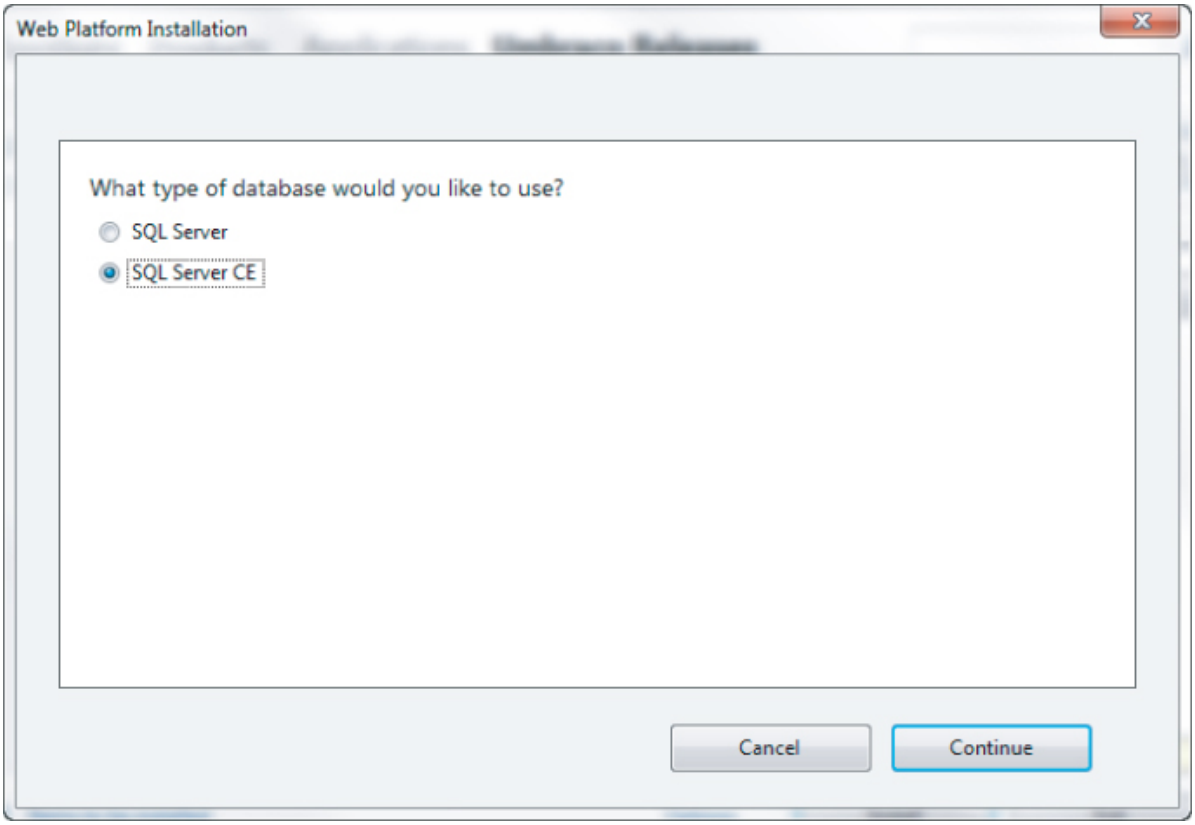
1. Launch the Web Platform Installer from the Microsoft Web Application Gallery (http://www.microsoft.com/web/gallery/Umbraco).

2. Review the list of files that the Web Platform Installer will download and install.

The list of installation files that the Web Platform Installer presents may only include the Umbraco Content Management System (CMS) component if you already have the required dependencies, such as SQL Server and the .NET Framework, installed.

3. Select the Microsoft SQL Server CE database option as shown in Figure 1.2.

Figure 1.2



4. Select New Web Site from the Web Site drop-down menu as shown in Figure 1.3.

5. Enter the site information for Site Name, Path, Port, Home Directory, and Host Name.

The author recommends leaving the Umbraco CMS Application Name blank, as shown in Figure 1.4.

Figure 1.3

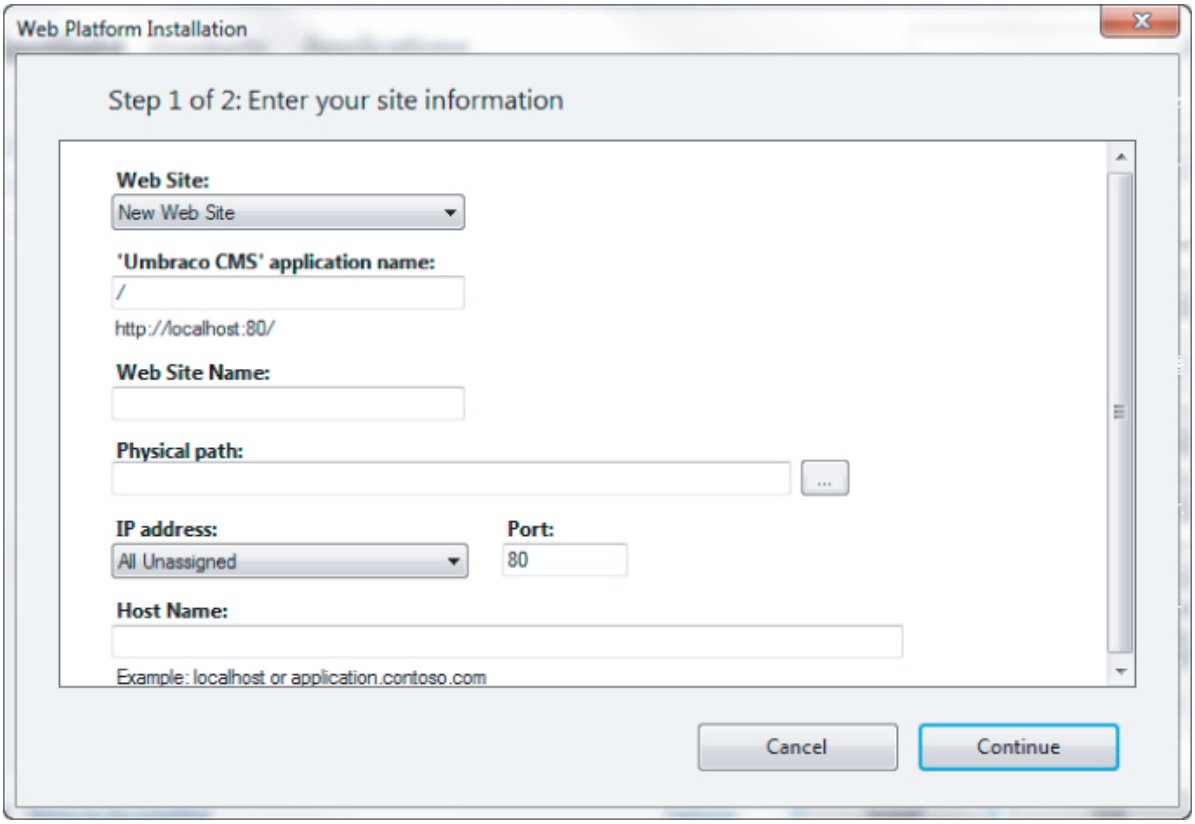
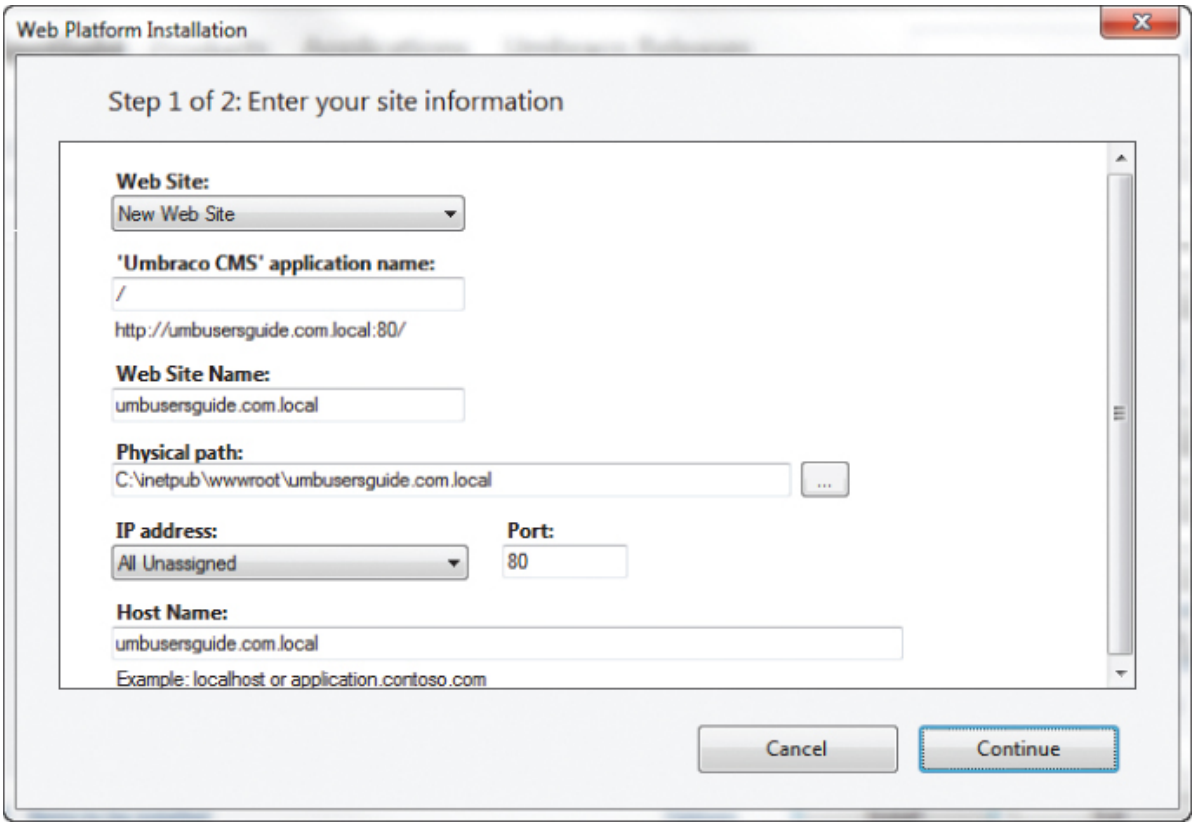


Figure 1.4



6. When the Web Platform Installer completes the installation process, click the Launch Umbraco CMS link to launch the Umbraco Installation Wizard.

7. When the Umbraco Installation Wizard loads in your browser, you see the Welcome screen (Figure 1.5). Click the Let's get started! button to complete the steps required to configure your Umbraco installation.

Figure 1.5

8. To continue, read and accept the Umbraco license by clicking the Accept and Continue button as shown in Figure 1.6.

9. Because you selected Microsoft SQL CE from the Web Platform Installer, the correct database options will already be set. Click the Install button to complete the Umbraco database configuration as shown in Figure 1.7.

10. Once the database is installed and configured completely, click the Continue button as shown in Figure 1.8.

Figure 1.6

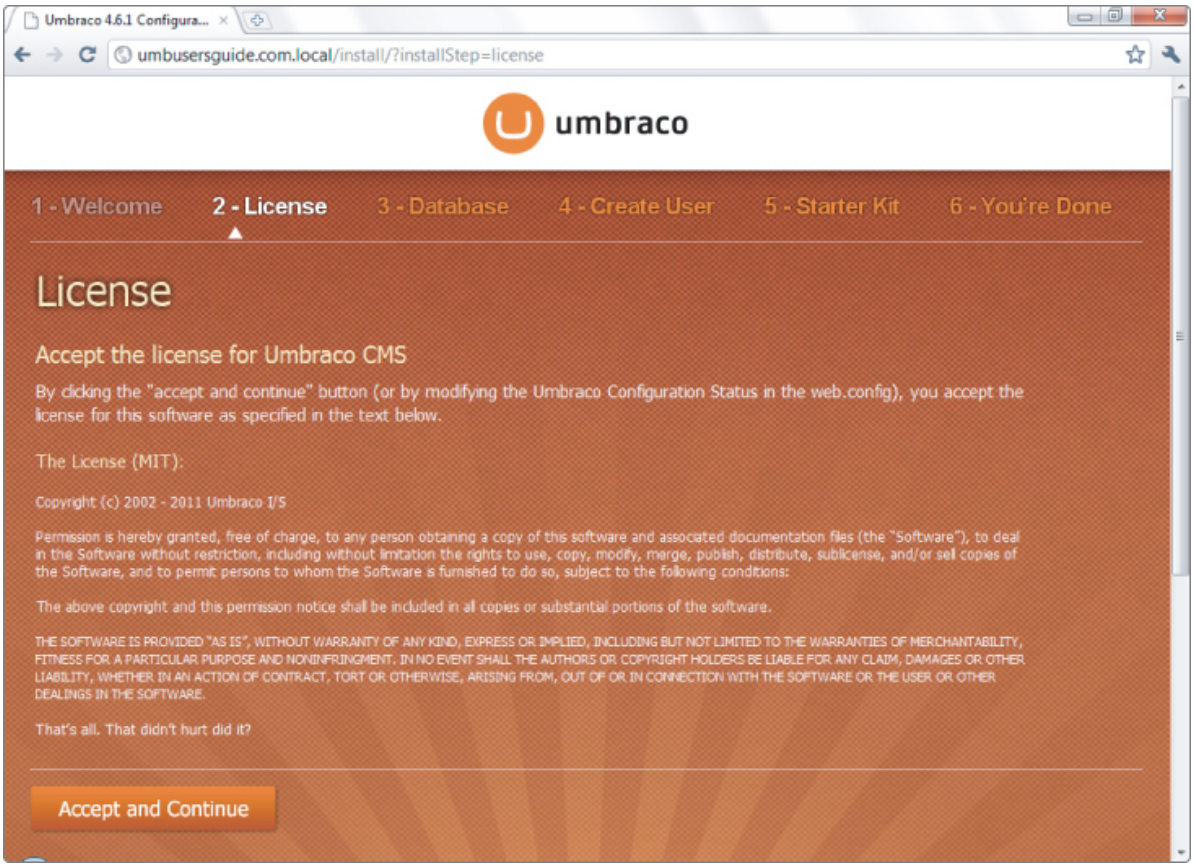

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/?installStep=license
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
License
Accept the license for Umbraco CMS
By clicking the "accept and continue" button (or by modifying the Umbraco Configuration Status in the web.config), you accept the license for this software as specified in the text below.
The License (MIT):
Copyright (c) 2002 - 2011 Umbraco I/S
Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, subject to the following conditions:
The above copyright and this permission notice shall be included in all copies or substantial portions of the software.
THE SOFTWARE IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGMENT. IN NO EVENT SHALL THE AUTHORS OR COPYRIGHT HOLDERS BE LIABLE FOR ANY CLAIM, DAMAGES OR OTHER LIABILITY, WHETHER IN AN ACTION OF CONTRACT, TORT OR OTHERWISE, ARISING FROM, OUT OF OR IN CONNECTION WITH THE SOFTWARE OR THE USER OR OTHER DEALINGS IN THE SOFTWARE.
That's all. That didn't hurt did it?
Accept and Continue

Figure 1.7

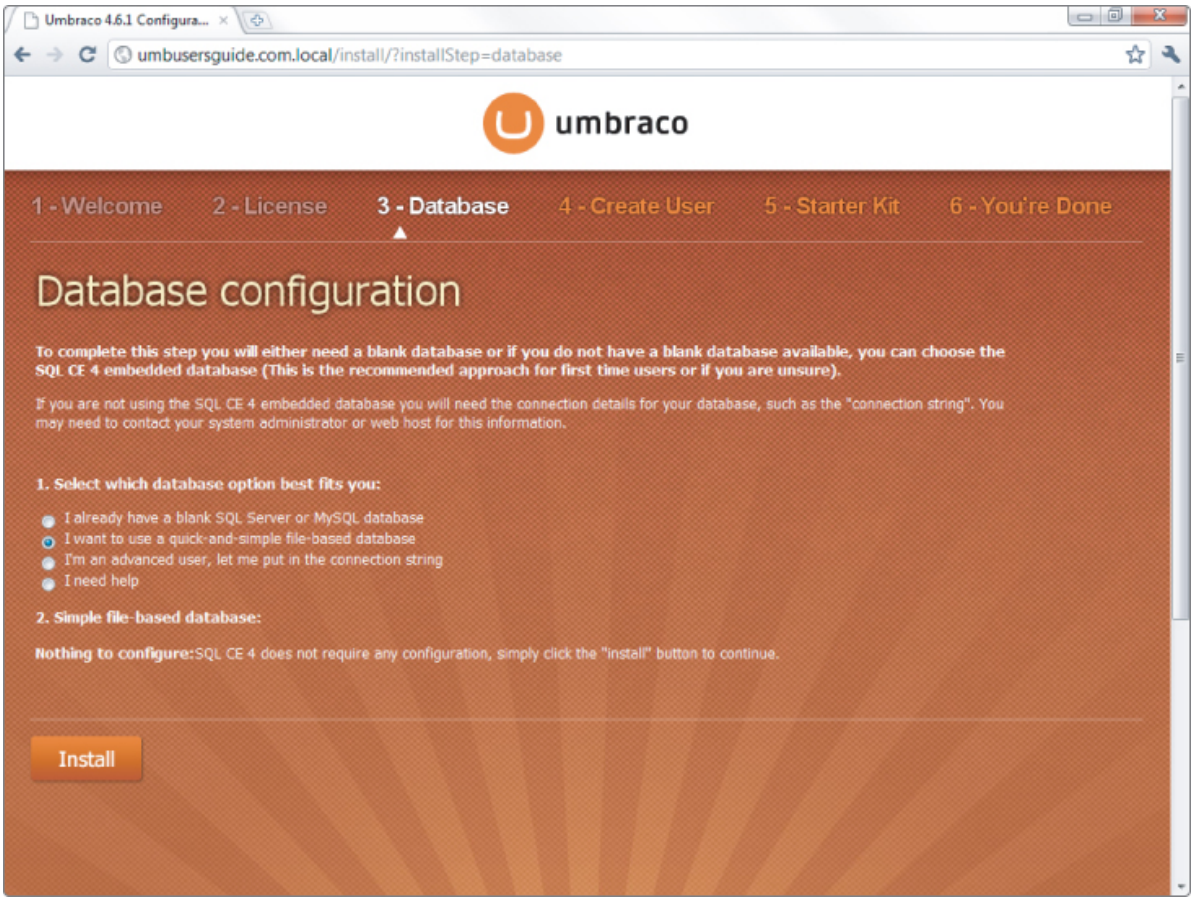
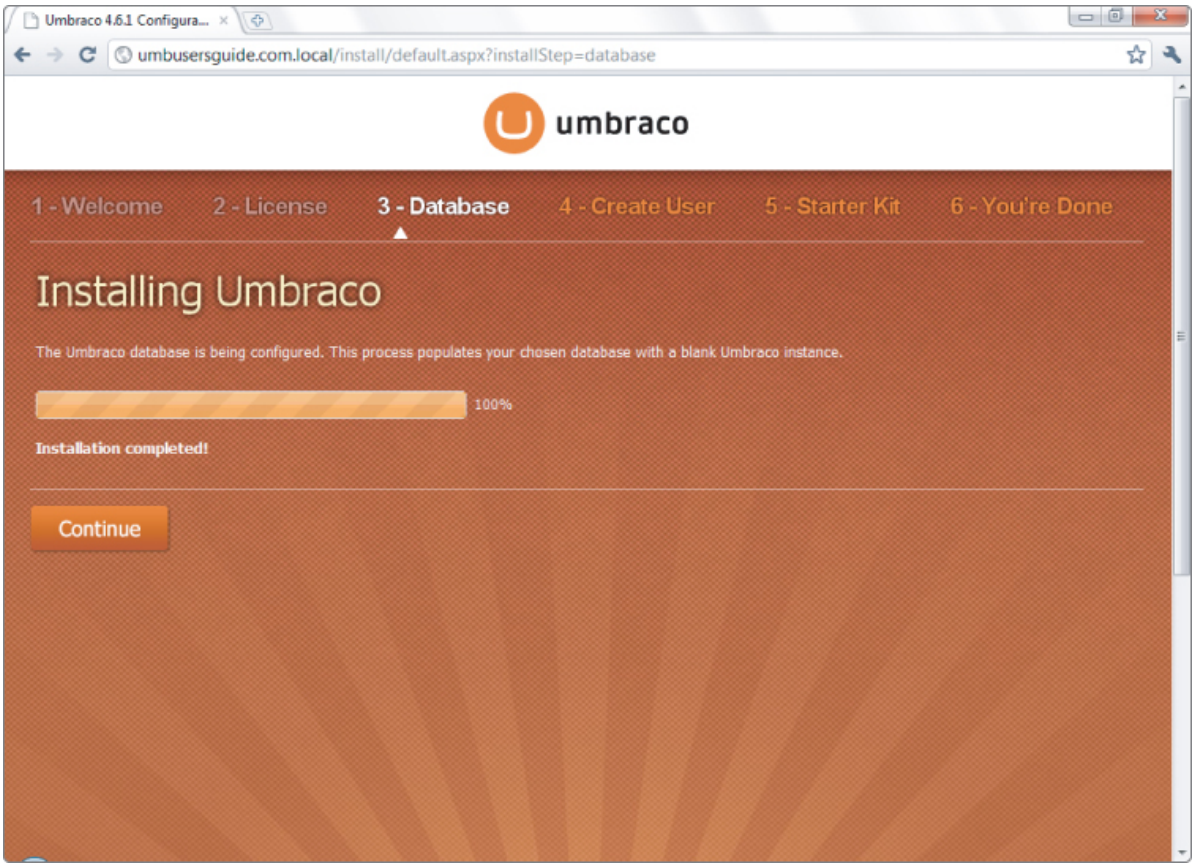

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/?installStep=database
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
Database configuration
To complete this step you will either need a blank database or if you do not have a blank database available, you can choose the SQL CE 4 embedded database (This is the recommended approach for first time users or if you are unsure).
If you are not using the SQL CE 4 embedded database you will need the connection details for your database, such as the "connection string". You may need to contact your system administrator or web host for this information.
1. Select which database option best fits you:
I already have a blank SQL Server or MySQL database
I want to use a quick-and-simple file-based database
I'm an advanced user, let me put in the connection string
I need help
2. Simple file-based database:
Nothing to configure: SQL CE 4 does not require any configuration, simply click the "install" button to continue.
Install

Figure 1.8



11. Create an Umbraco user by providing a username, email, and password and then clicking the Create User button. You can also register for the Umbraco newsletter using the email address you provide by selecting the Sign up for our monthly newsletter check box as shown in Figure 1.9.

12. From the Starter Kits screen, you can browse descriptions of each of the Starter Kits by hovering over their icons. To install a Starter Kit, simply click one of the Install this kit buttons.

If this is your first time installing Umbraco, the author recommends selecting the Simple Starter Kit as shown in Figure 1.10. You can find more detailed information about the Starter Kits in the "Utilizing Umbraco Starter Kits" section later in this chapter.

13. Once the Starter Kit is installed, you have the option of installing a skin from the Install a Skin screen. Umbraco Skins are a simple way to make your Starter Kit beautiful. You can preview a skin by hovering over the skin icon and install a skin by clicking the Install button as shown in Figure 1.11.

Figure 1.9

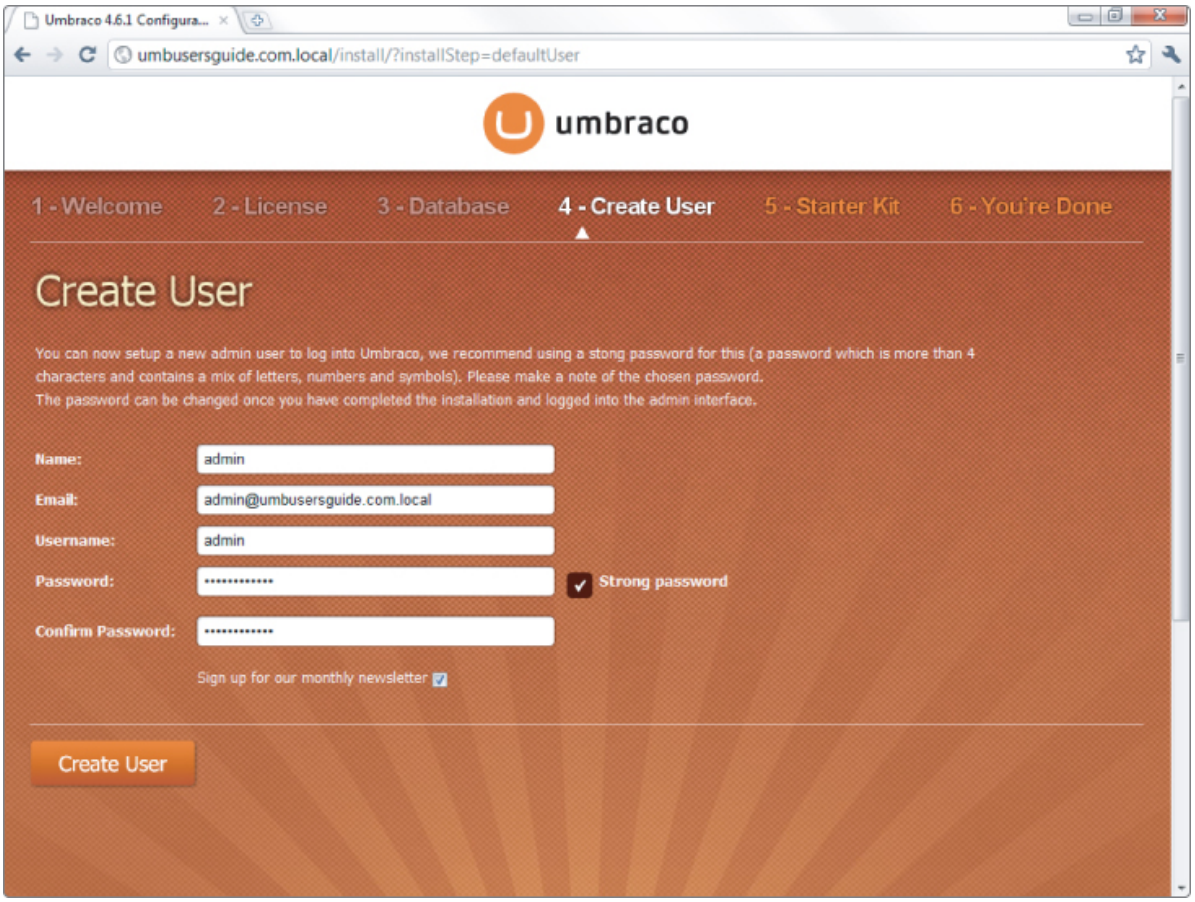


Figure 1.10

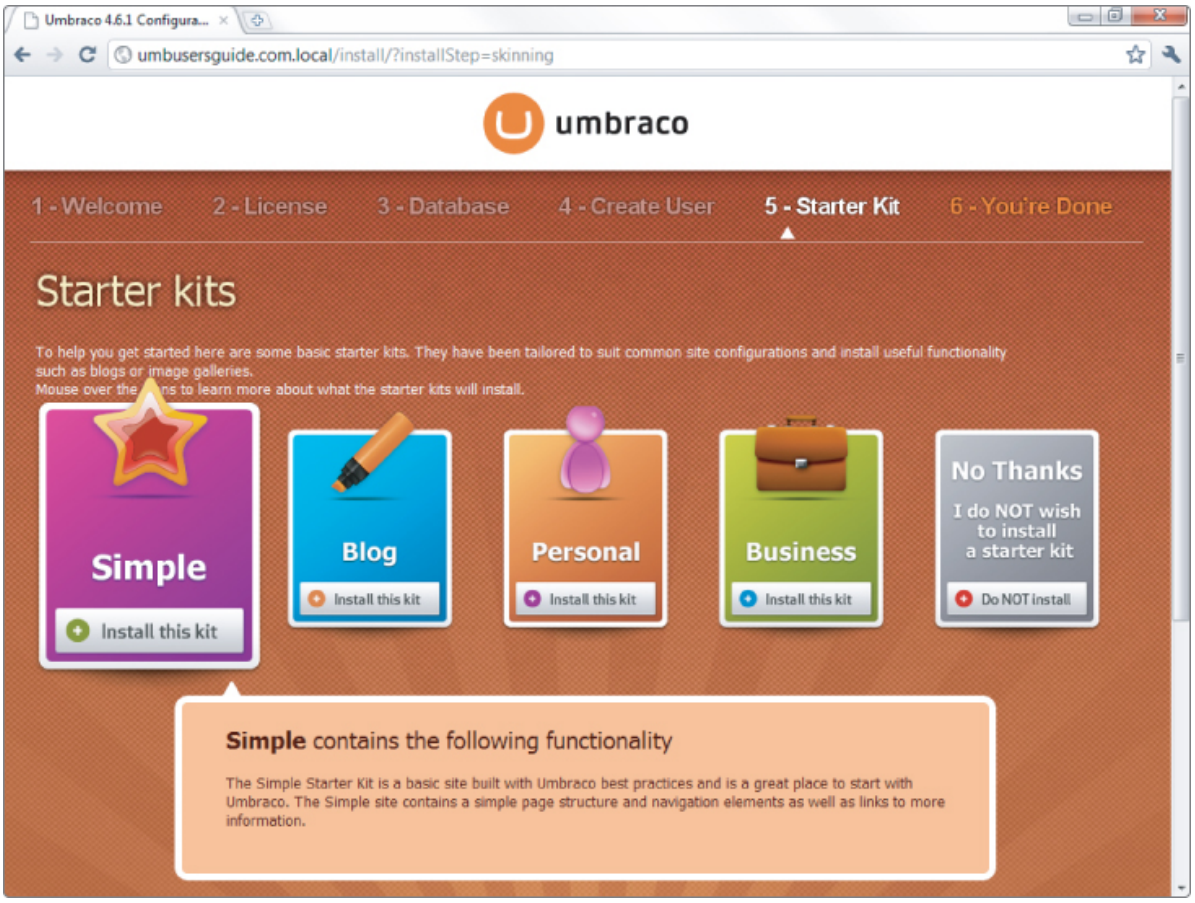
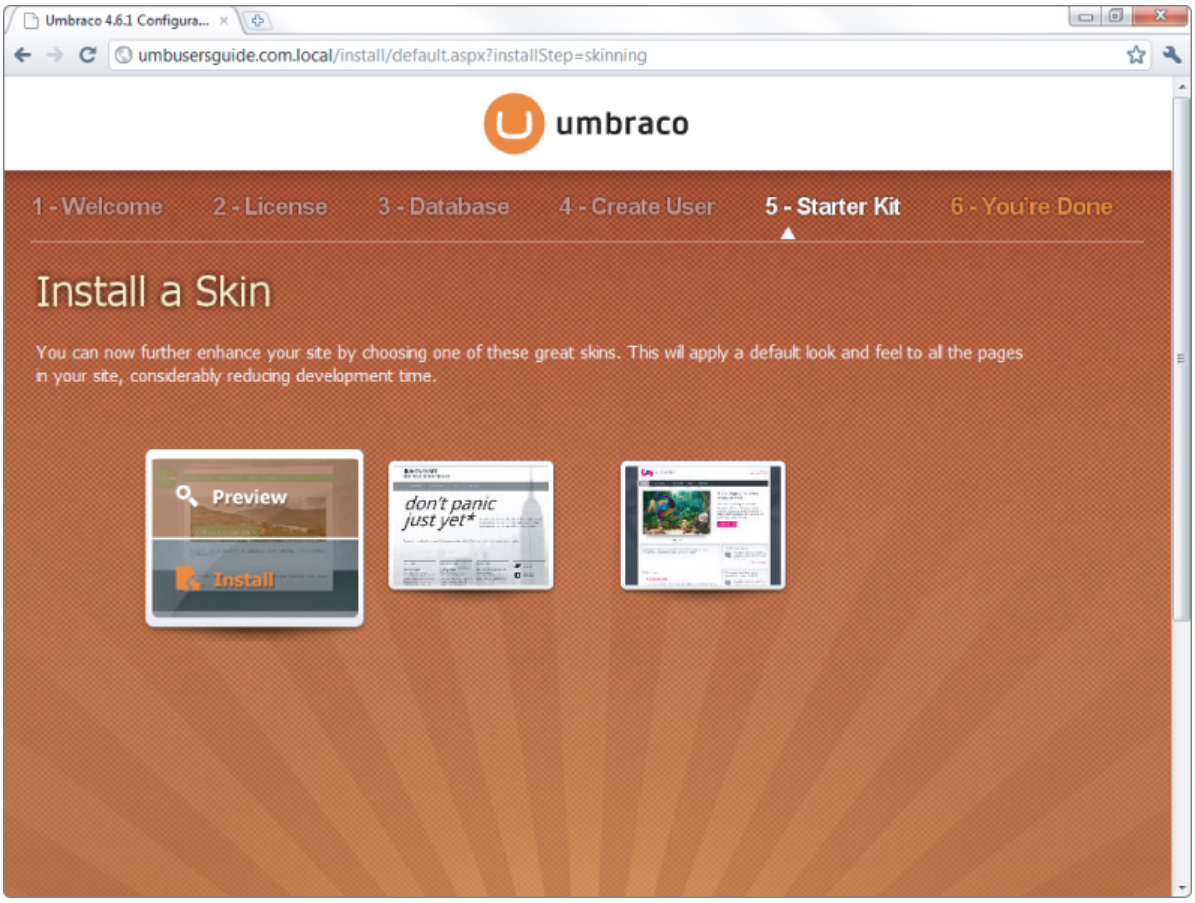

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/?installStep=skinning
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
Starter kits
To help you get started here are some basic starter kits. They have been tailored to suit common site configurations and install useful functionality such as blogs or image galleries.
Mouse over the ons to learn more about what the starter kits will install.
Simple
Install this kit
Blog
Install this kit
Personal
Install this kit
Business
Install this kit
No Thanks
I do NOT wish to install a starter kit
Do NOT install
Simple contains the following functionality
The Simple Starter Kit is a basic site built with Umbraco best practices and is a great place to start with Umbraco. The Simple site contains a simple page structure and navigation elements as well as links to more information.

Figure 1.11

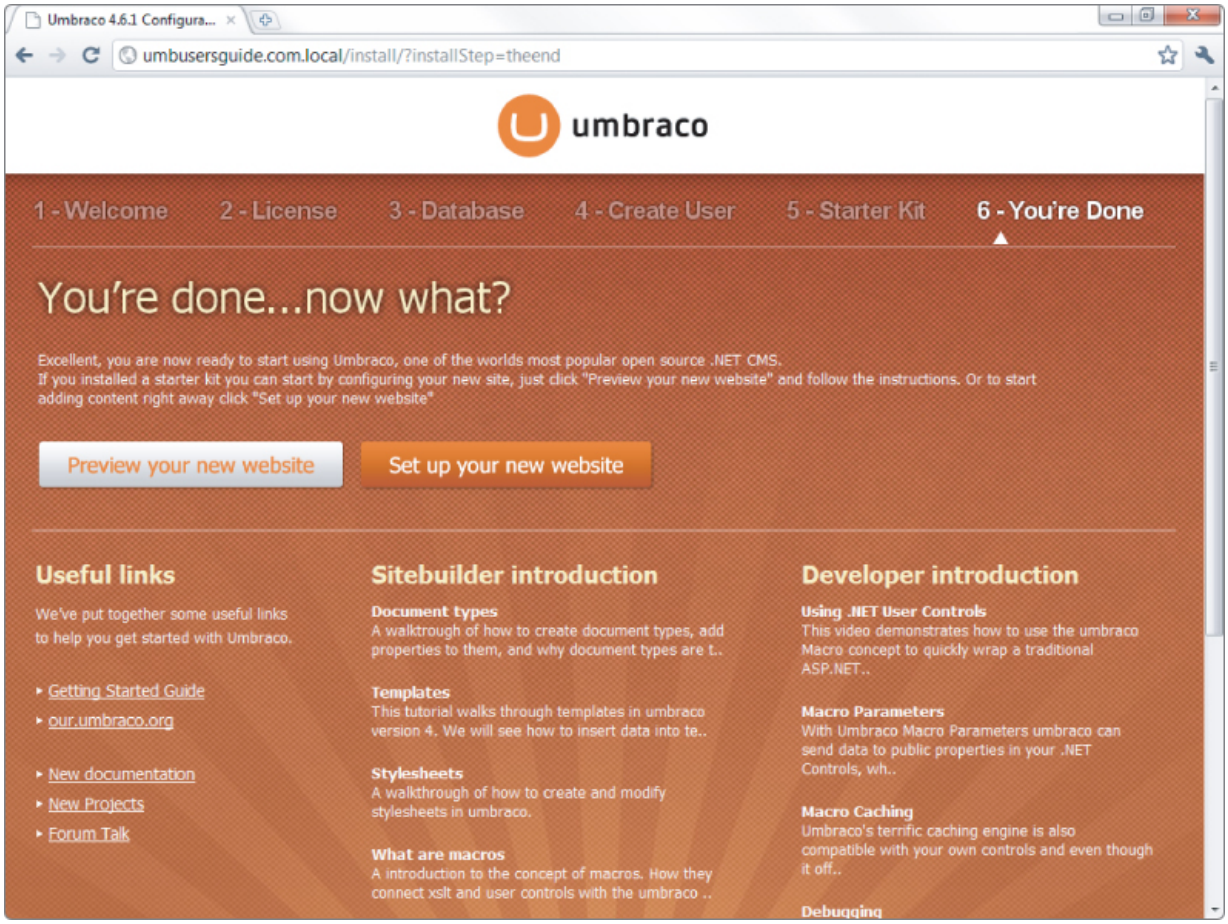


14. Once the skin is installed you will see the You're done screen as show in Figure 1.12. From this screen click the Preview your new website button to launch the skin editor or the Set up your new website button to launch the Umbraco backoffice. This screen also has a collection of useful links to additional information about getting started working with Umbraco.

You're all done and Umbraco is ready for use, complete with a fully functional web site and beautiful skin! As you can see, when you compare the process to a manual installation as discussed in the next section, using the Web Platform Installer greatly simplifies the setup and configuration of the website and database requirements for Umbraco.

A limitation of using the Microsoft Web Platform Installer to install Umbraco is that only Microsoft SQL databases are supported. If you want to install Umbraco using a MySQL database, you must configure the database prior to running the installation from the Microsoft Web Platform Installer. You then provide the database connection information during the Umbraco Installation Wizard database configuration step rather than during the Web Platform Installer configuration step.

Figure 1.12



Installing Umbraco Manually

Although using the Microsoft Web Platform Installer to install Umbraco is strongly advised, cases may exist where a manual installation is desired. In such a case, you must manually complete the steps to create the IIS website,

create the database, and set required permissions. The following are the steps to complete a manual installation of Umbraco: If you find yourself stuck on one of these steps, try installing Umbraco using the Quick Start steps first and then return to this section later.

1. Create a new folder with a unique name for your Umbraco installation on your local hard drive.

2. From IIS Manager create a new site and set the home directory to be the new folder; leave the remaining settings at the default.

3. Set permissions on the new folder to allow the new site's application pool identity (usually this is the Network Service or Application Pool Identity account) to Modify, Read & Execute, and Write.

4. From SQL Management Studio create a new database and assign a login to the dbo role for the database. Make a note of the SQL instance name (such as ./SQLEXPRESS), the database name, and the login name and password.

You may skip step 4 if you want to use the Microsoft SQL CE option later in the installation.

5. Download the latest Umbraco release from the Umbraco CodePlex home Downloads tab (http://umbraco.codeplex.com/).

6. Copy the Umbraco files from the .zip archive into the new folder. Make sure to unblock the .zip file from the Windows File Property dialog before extracting the contents.

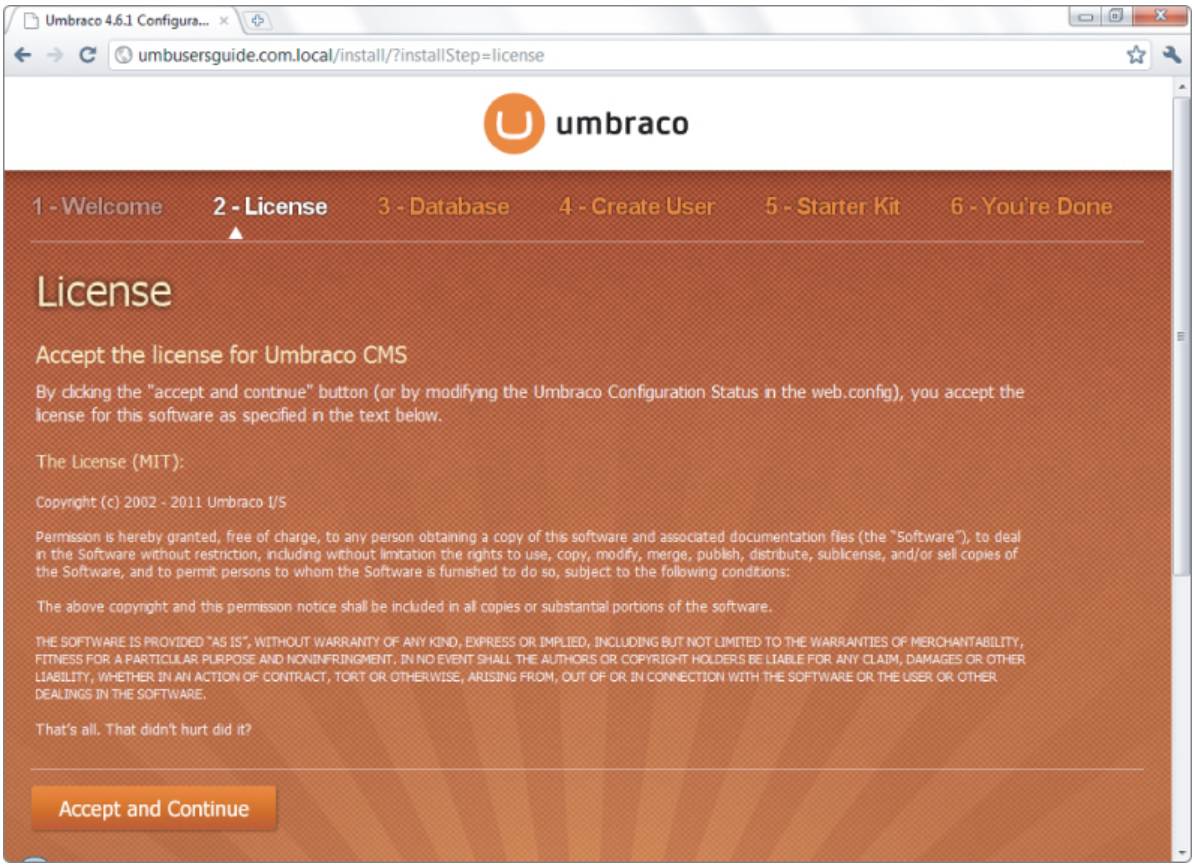
7. Open a web browser and navigate to the root of the new site.

8. When the Umbraco Installation Wizard loads in your browser, you will see the Welcome screen (Figure 1.13). Click the Let's get started! button to complete the steps required to configure your Umbraco installation.

Figure 1.13

9. To continue, read and accept the Umbraco license by clicking the Accept and Continue button as shown in Figure 1.14.

Figure 1.14



10. Select the Microsoft SQL Server option in the Database Type drop-down list and enter the Connection Details you created in step 4 (see Figure 1.15). Click the Install button to create and configure the Umbraco database.

11. Once the database is installed and configured completely, click the Continue button as shown in Figure 1.16.

12. Create an Umbraco user by providing a username, email, and password and then clicking the Create User button. You can also register for the Umbraco newsletter using the email address you provide by selecting the Sign up for our monthly newsletter check box as shown in Figure 1.17.

13. From the Starter Kits screen you can browse descriptions of each of the Starter Kits by hovering over the Starter Kit icons. To install a Starter Kit click one of

the Install this kit buttons as shown in Figure 1.18. You can find more detailed information about the Starter Kits in the “Utilizing Umbraco Starter Kits” section later in this chapter.

14. Once the Starter Kit is installed you have the option of installing a skin from the Install a Skin screen. You can preview a skin by hovering over the skin icon and install a skin by clicking the Install button as shown in Figure 1.19.

Figure 1.15

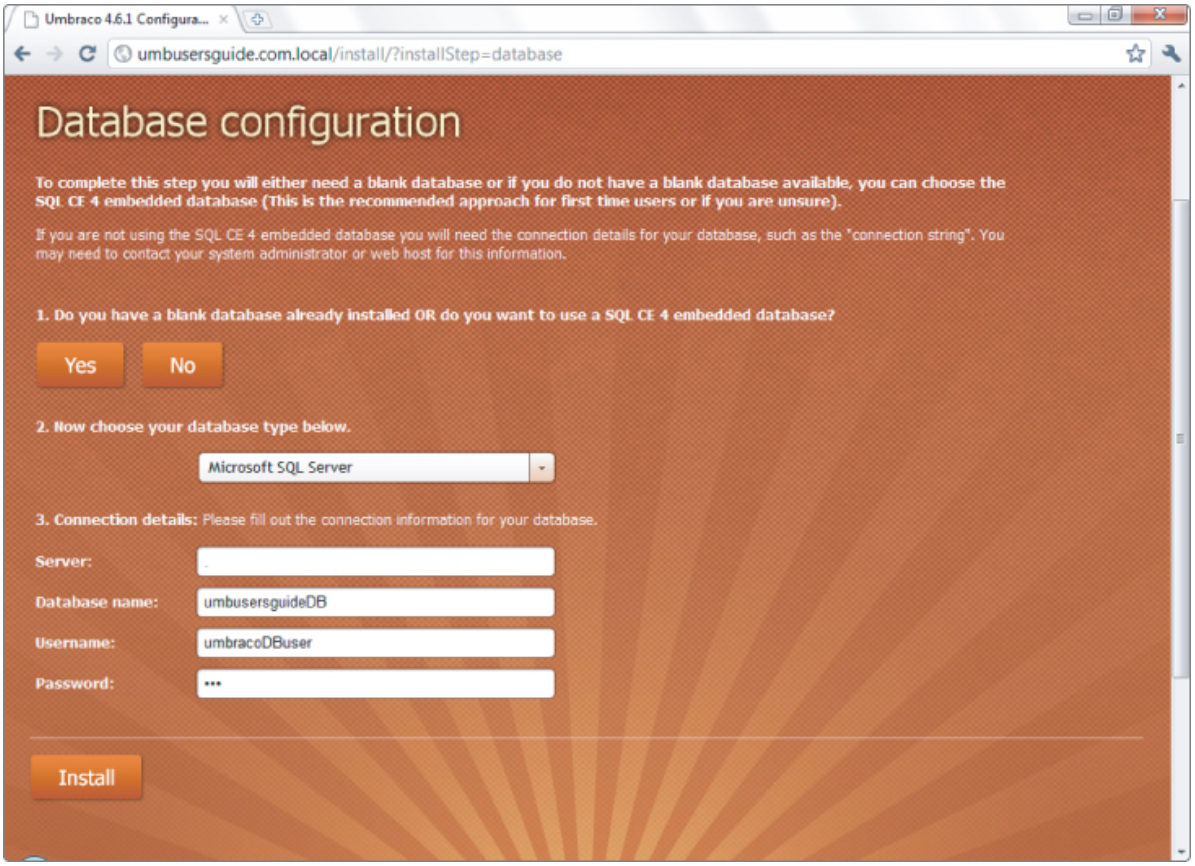


Figure 1.16

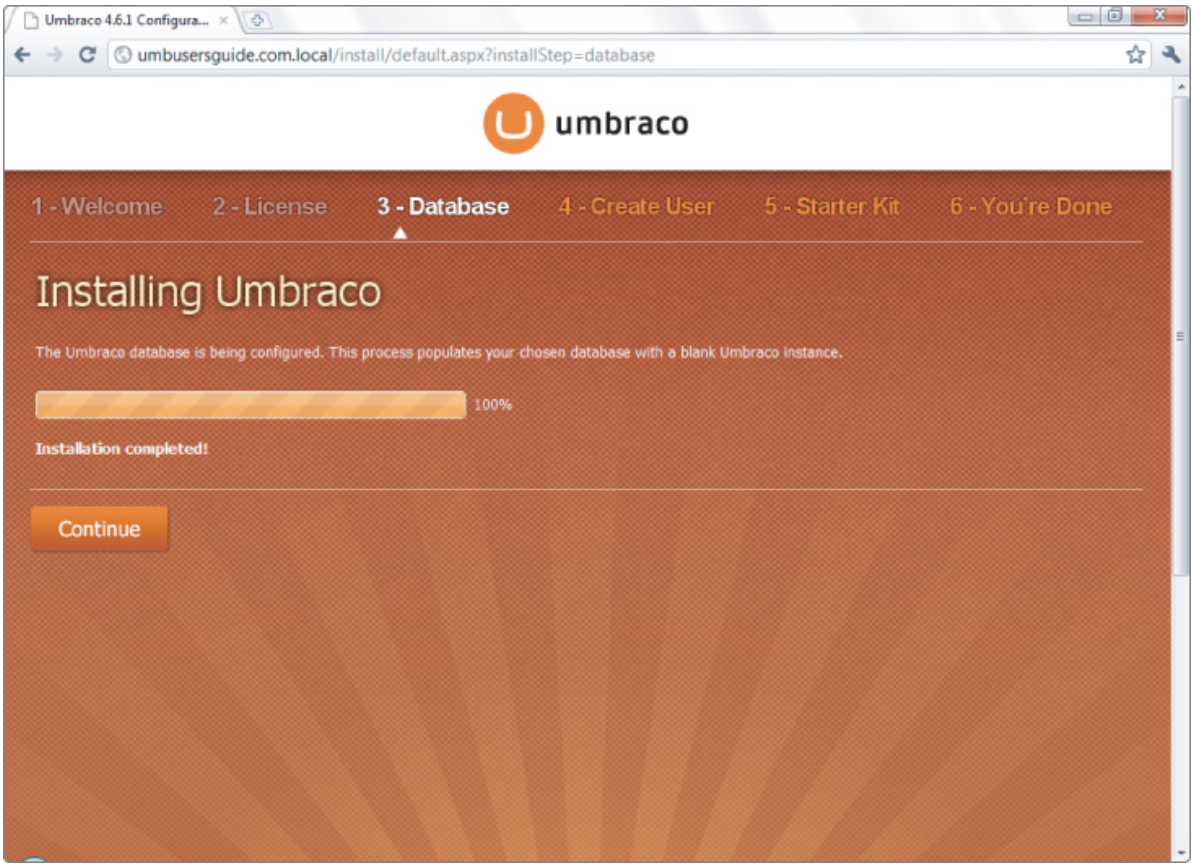

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/default.aspx?installStep=database
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
Installing Umbraco
The Umbraco database is being configured. This process populates your chosen database with a blank Umbraco instance.
100%
Installation completed!
Continue

Figure 1.17

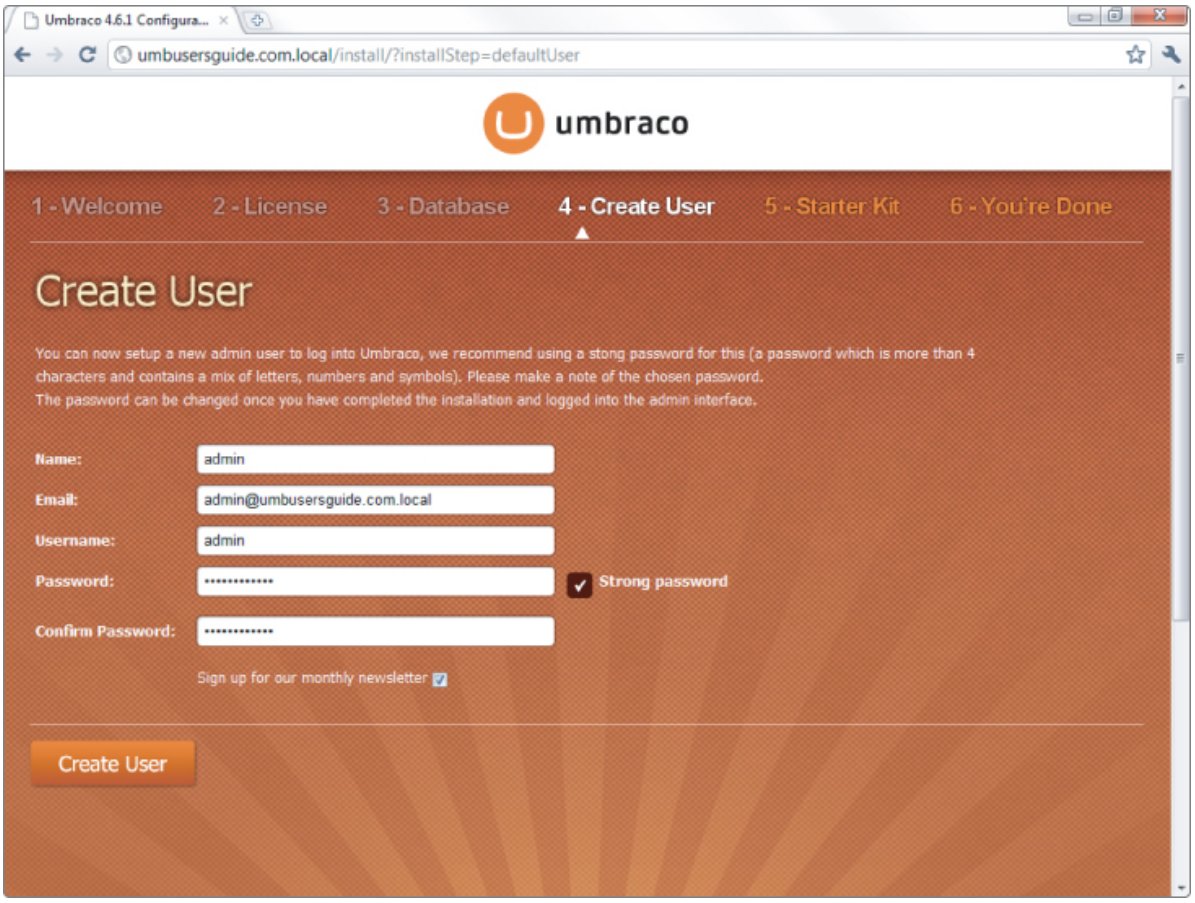

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/?installStep=defaultUser
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
Create User
You can now setup a new admin user to log into Umbraco, we recommend using a stong password for this (a password which is more than 4 characters and contains a mix of letters, numbers and symbols). Please make a note of the chosen password.
The password can be changed once you have completed the installation and logged into the admin interface.
Name:
admin
Email:
admin@umbusersguide.com.local
Username:
admin
Password:
Strong password
Confirm Password:
Sign up for our monthly newsletter
Create User

Figure 1.18

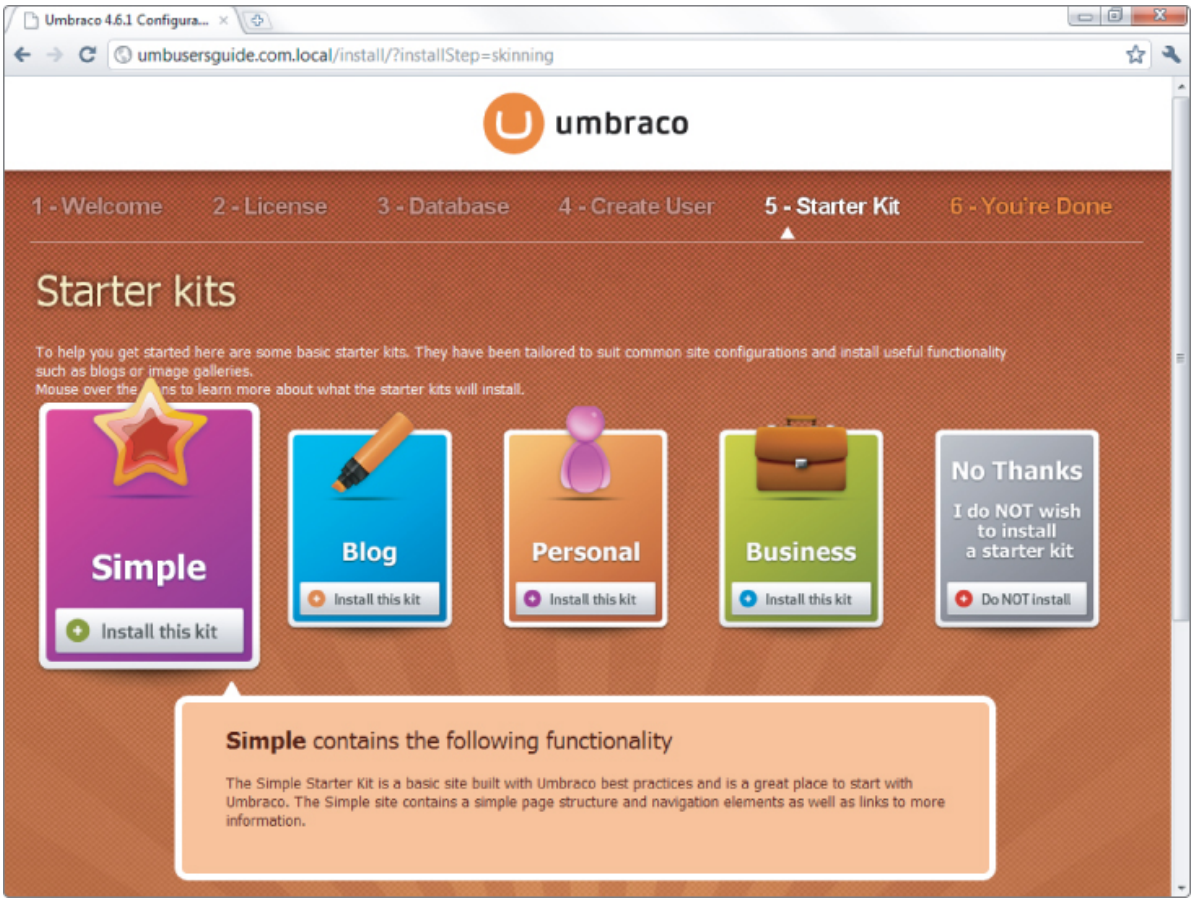
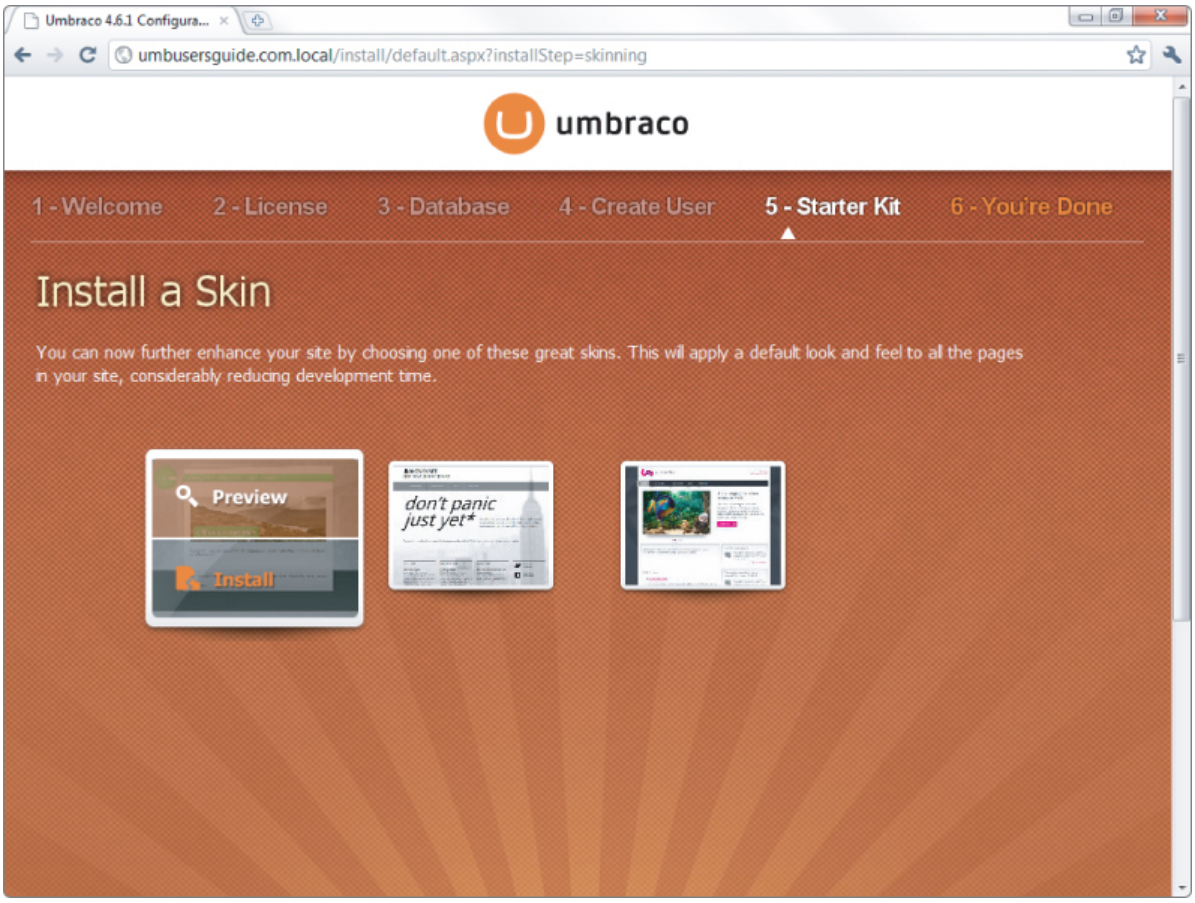

Umbraco 4.6.1 Configura...
umbusersguide.com.local/install/?installStep=skinning
umbraco
1 - Welcome
2 - License
3 - Database
4 - Create User
5 - Starter Kit
6 - You're Done
Starter kits
To help you get started here are some basic starter kits. They have been tailored to suit common site configurations and install useful functionality such as blogs or image galleries.
Mouse over the ons to learn more about what the starter kits will install.
Simple
Install this kit
Blog
Install this kit
Personal
Install this kit
Business
Install this kit
No Thanks
I do NOT wish to install a starter kit
Do NOT install
Simple contains the following functionality
The Simple Starter Kit is a basic site built with Umbraco best practices and is a great place to start with Umbraco. The Simple site contains a simple page structure and navigation elements as well as links to more information.

Figure 1.19



15. Once the skin is installed you will see the You're done screen as show in Figure 1.20. From this screen click the Preview your new website button to launch the skin editor or the Set up your new website button to launch the Umbraco backoffice. This screen also has a collection of useful links to additional information about getting started working with Umbraco.

You now have everything you need to successfully run, build, and extend Umbraco. Obviously not all Umbraco installations will fit into the preceding step-by-step instructions. The remainder of this chapter covers additional considerations for other installation scenarios and environments.

A Note on Security