

Managing and maintaining a CMS website

Reference guide

Aims and Learning Objectives

The aim of this document is to provide guidance to University website managers and web content publishers on managing and maintaining a website using the University Content Management System (CMS).

After reading this guide you will be able to:

- understand how the CMS works;
- access your website in the CMS;
- change your CMS preferences;
- create and/or add new items (e.g. web pages, folders, images, etc);
- manage items (delete, move, rename, etc);
- edit web pages using 'edit-on Pro';
- edit, add and order navigation menu links;
- manage users *;
- restrict access to folders *.

* only applicable to users with Site Administrator role

Document information

This document is available on the web. To find this, go to www.bristol.ac.uk/it-services/learning/resources and in the **Keyword** box, type the document code given in brackets at the top of this page.

Related documentation

Other related documents available from the web:

Editing web content using 'edit-on Pro' – Reference guide

<http://www.bristol.ac.uk/it-services/learning/documentation/editonpro-1/editonpro-1r.pdf>



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Introduction

The University Web Content Management System (CMS) is a sophisticated tool for building, managing and maintaining University template-based websites through a single web-based interface. In the CMS you can easily create and edit web content using 'edit-on Pro', a Word-like web editor built into the CMS interface.

Some of the CMS features and benefits include:

- Easy-to-use interface for non-technical staff
- Easy content publishing via a Word-like WYSIWYG editor
- Flexible workflow management to ensure quality control
- Flexible user rights and roles to control access to relevant areas of the website
- Easy to enforce template and consistent look and feel
- Built-in web accessibility and standards compliance

Prerequisites

Basic computer skills (use of keyboard and mouse, file management, and so on), some word processing and web browsing experience.

Some experience of web page creation and HTML are useful but not essential.

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1. Introduction to the CMS

Objectives To get an overview of the Content Management System.

Comments A Content Management System FAQ is available for download from www.bris.ac.uk/ips-projects/cms/faq/.

Warning!

As a University web publisher it is your responsibility to ensure that the information you provide on your website is up-to-date, professional and accessible. Also, it must comply with current Data Protection, Freedom of Information and copyright legislation, and with the University's accessibility policy.

For further information on your responsibilities as a web publisher, please refer to <http://www.bristol.ac.uk/web/guide/gettingstarted/responsibilities.html>

What is the CMS?

In a nutshell, the Content Management System (CMS) is a sophisticated tool for building websites and managing web content. It provides a set of integrated tools to help technical and non-technical web publishers in the University to manage, create and maintain websites and/or intranets.

The University CMS was developed using Plone, a content management framework that works hand-in-hand with and sits on top of Zope, an open source application server used at the University since 2001.

The CMS has a user-friendly, browser-based administrative interface that makes it easy to add/delete/move items such as folders, images, web pages, etc. It also integrates 'edit-on Pro', a Java based web editor already used with the Zope Simplified Control Screens (SCS) that preceded the CMS.

One of the most important features of the CMS is its workflow, in other words the publishing process (as illustrated in Figure 1). The workflow adds a quality control element as well as a 'safety net' ensuring that you cannot directly edit a live web page. Versioning is another useful feature of the CMS. Old versions of web pages are automatically kept on the system so you can revert to previously published pages if you want.

User roles in the CMS

As a user of the CMS, you will be assigned one or more of the following roles:

- **Owner** – this is a special role given to users when they create an item (e.g. a web page, a folder, etc). It applies to a user for that item only; the information is stored on the item. You don't normally explicitly assign someone as an owner, the system does that for you.
- **Administrator** – this role is given to those users who will manage the site. Usually not more than three users will be given this role for a departmental site. Administrators can delete or edit content, add/remove users, assign them the roles of Editor or Reviewer, and to some extent alter a site's configuration.
- **Editor** – this role is given to content writers. However, Editors cannot publish to the live site. They submit their changes to the Reviewer who either approves them for publication or rejects them and sends them for correction.
- **Reviewer** – this is a user with limited permissions whose role is to review content submitted by Editors and who decides when it is ready for publication. This review process introduces an element of quality control in the overall publishing process.

Note that the last two roles can be combined into Editor/Reviewer, enabling holders of these combined roles to create content and publish it straight away.

Workflow

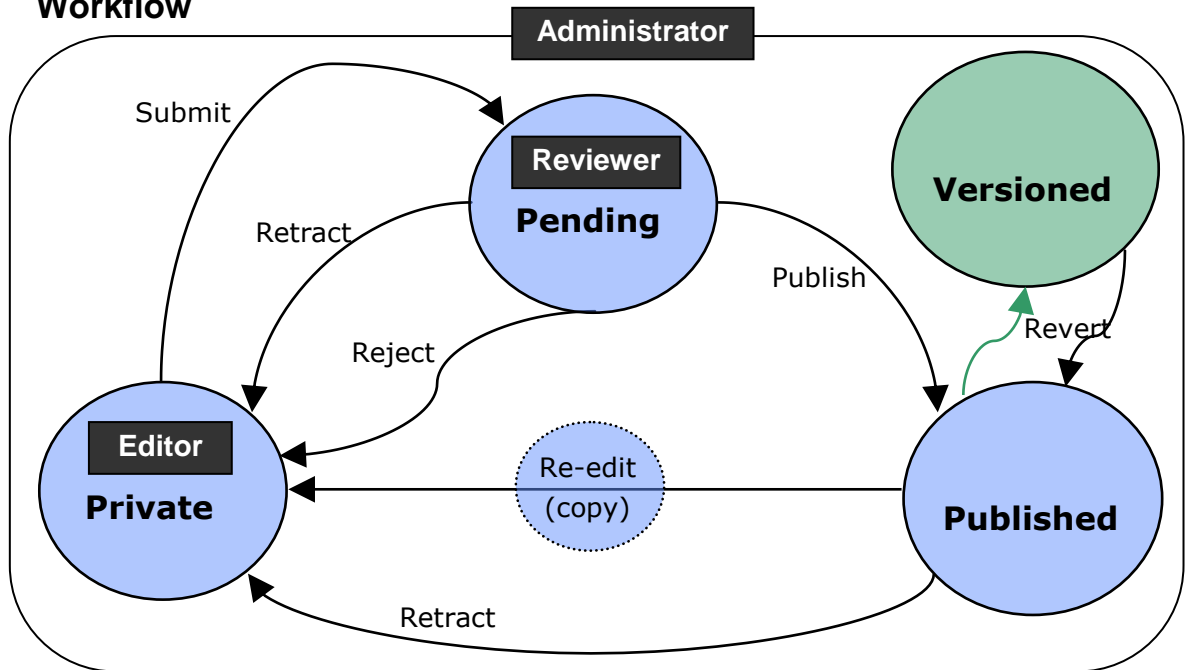


Figure 1 – CMS workflow diagram

In a nutshell, workflow is a sequence of actions or events applied to an object (web page, image, folder, etc.) in order to move it from one state to another until it reaches its final desired state.

The diagram above shows the different roles that can be assigned to a user (**Site Administrator**, **Editor**, **Reviewer**), the various states (**Private**, **Pending**, **Published**) an item can be in, and the relationships between them.

For example, a typical workflow for a new web page would be: in the **Private** state while being created by an **Editor** who then submits it for review to a **Reviewer**. At this point the page is in a **Pending** state while the **Reviewer** decides whether it needs more work (he/she rejects the page which goes back to **Private** state) or whether it is ready for publication (in which case the page moves to **Published** state).

Acquisition in the CMS

Acquisition is one of the most powerful aspects of Zope/Plone. It means that CMS items are situated in other items called containers, and can acquire properties and behaviours from their containers.

In the following example:

```

mydepartment
├── staff
│   └── jblogg.html
  
```

the **staff** item is a folder contained in the **mydepartment** folder item. So, site properties (e.g. the department name, address, etc) and site navigation attached to **mydepartment** would be acquired by the **jblogg.html** item unless overridden at the level of the **staff** folder.

Acquisition is particularly useful for enforcing consistency and reusing snippets of code, content, attributes and behaviours across an entire website.

'edit-on Pro'

'edit-on Pro' is a Word-like web editor that has been incorporated into the CMS and is accessed through a web browser. There is therefore no need to install it on individual PCs, however you need the Java plug-in installed on your computer.

For more information on using 'edit-on Pro', refer to the '*Editing web content using 'edit-on Pro' reference guide*', downloadable as a PDF file from <http://www.bristol.ac.uk/is/learning/documentation/editonpro-r1/editonpro-r1.pdf>

Site structure

Even if you do not have to create the site structure yourself, it is useful to understand how websites are organised.

Just as information files are stored in a meaningful directory structure (i.e. in folders and sub-folders) for ease of access and retrieval, web files (e.g., content pages, images, etc) are organised in a similar hierarchical tree structure.

Figure 2 shows how things are organised at the University:

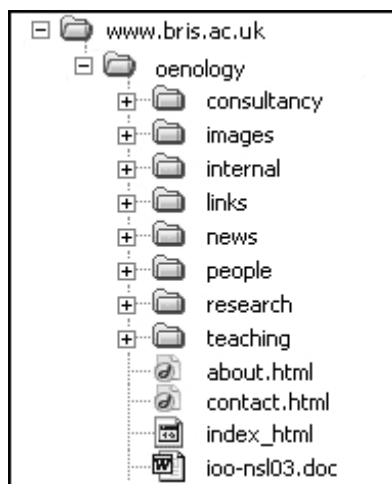


Figure 2 – example site structure

Right at the top of the tree, we have the **absolute root**, i.e. **www.bristol.ac.uk**.

In the first level, immediately below the absolute root, we have the **local root** folders corresponding to the folders allocated to individual departments (for example **oenology**).

This means that departments have a top level URL, such as:

www.bristol.ac.uk/oenology/.

Consequently, the path to the contacts page (**contact.html**) is:

www.bristol.ac.uk/oenology/contact.html.

Similarly, the path to the research index page in the Institute of Oenology would be **www.bristol.ac.uk/oenology/research/**.

Note Notice that **research** is a folder, and as such must contain a page named **index.html** that the browser will default to if no filename is included in the path.

The University web template

The University's top level web pages were transferred to the CMS in December 2005. In order for the University to present a consistent and professional image to all users and to comply with current web standards, a template based on the new design has been made available for use on all official University websites. The template is customisable to some extent and can accommodate a department's own identity. As well as ensuring consistency of presentation and navigation, the CMS template offers many other benefits to users: reduced development time (= lower cost), focus on content (no need to worry about presentation) and built-in web accessibility features.

For more on the templates and the web at the University in general, see the 'University web guide' at: <https://www.bris.ac.uk/web/guide/> (UoB only).

2. Getting started

Objectives To access the CMS administration interface, set your preferences and get an understanding of user roles.

Comments In the CMS, a website has two views: the **public view** and the **CMS administration interface**.

Accessing the public view

The URL¹ for the public view of a CMS based University website typically looks like:

<http://www.bristol.ac.uk/mydepartment>

However, while your site is in development, you will need to replace **www** with **wwwdev**. Thus the URL of a site under construction looks like:

<http://wwwdev.bristol.ac.uk/mydepartment>



Figure 3 – CMS website public view

Accessing the CMS administration interface

Whereas the public view is accessible by anyone, the CMS view is restricted to authorised users only. The URL to access the CMS view is:

<http://cms.bristol.ac.uk/mydepartment>

- Open your preferred browser and enter the CMS address for your website in the **Location bar** (Figure 4), then press **<Enter>**.

¹ URL stands for Uniform Resource Locator. It is the address of a website and looks like <http://www.companyname.co.uk>

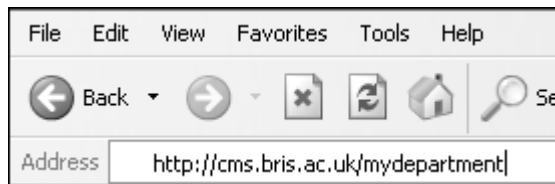


Figure 4 – typing the CMS URL in the browser Location bar

You will be automatically directed to the **Single Sign-on for Web Applications** page.

- Enter your UoB **Username** and **Password**, and click **Login** (Figure 5).

A screenshot of the 'Single Sign-on for Web Applications' login page. The page has a title bar with a triangle icon and the text 'Single Sign-on for Web Applications'. Below the title bar, there are three main sections. The first section, 'UOB Login', contains a 'Username:' label with a text input field, a 'Password:' label with a text input field, and a 'Login' button. Below these fields are links for 'About the UOB Domain', 'Warn me before logging me in to other sites' (with a checkbox), and 'What does this mean?'. The second section, 'Remember to Logout', contains a warning: 'It is important that you remember to Logout or close your web browser when you have finished accessing services that require authentication'. The third section, 'Check the URL', contains the text 'Check the address of this web page begins with:' followed by the URL 'https://sso.bris.ac.uk/sso/' and the instruction 'If it does not - do not continue!'.

Figure 5 – Single Sign-on for Web Applications login page

Note If you do not have access rights to the local root folder (i.e. **/mydepartment/**), but at the level of a subfolder or specific web page, you will need to include the exact path to that subfolder or web page.
For example if you are responsible only for the teaching area, then the full URL path will be **http://cms.bristol.ac.uk/mydepartment/teaching/**.

You are now in the CMS administration interface for your unit's website (see Figure 6). By default the CMS opens the tab showing the homepage.

Accessing the CMS from outside the University

At the moment access to the CMS is restricted to the UoB domain, which means that to access it from outside the University, you will need to connect to the University network either using the **UoB VPN service** (see www.bristol.ac.uk/it-services/advice/homeusers/uobvpn/ for further information), or the **authenticated proxy service** (see www.bristol.ac.uk/it-services/advice/homeusers/webcache/auth/ for further information)

Overview of the CMS administration interface

The CMS administration interface contains all the tools needed to create and maintain a website.

Figure 6 shows the different areas of the CMS.

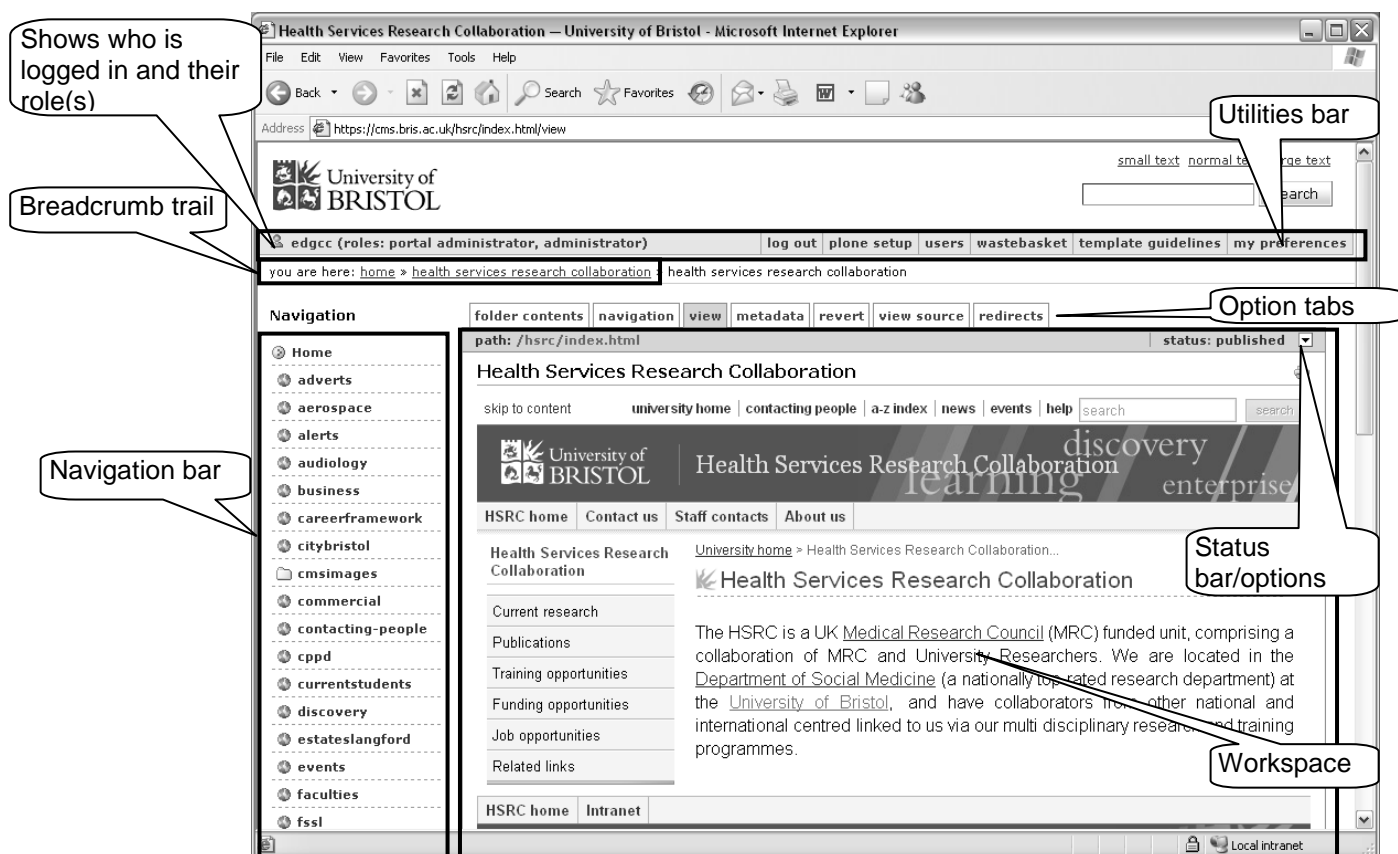


Figure 6 – CMS website administration interface

Breadcrumb trail

The breadcrumb trail shows your relative position within the site folder structure. You can use the breadcrumb links to go up to a higher level folder.

Navigation bar

The navigation bar displays all the websites hosted on the CMS. By default your website is highlighted and expanded to show the first level folders (if there are any). Clicking on any first level folder will expand it to show any sub-folder(s) it may contain. You can use it to navigate through the site folder structure.

Note The Navigation bar can be disabled if you find the CMS to be running slowly (see the 'Changing your Personal Preferences' section on the next page).

Utilities bar

The utilities bar contains a number of options. The most relevant to site administrators and content maintainers are:

- **log out** – click this to log out when you have finished using the CMS.
- **wastebasket** – every time you delete an item it is sent to the wastebasket where you can retrieve it, should you realise you have made a mistake. **Note that deleted items are kept for 90 days in the wastebasket.**
- **template guidelines** – this is a link to the University's guidelines on using the CMS template (opens a new window).
- **my preferences** – use this to change your UOB password and your personal CMS settings (see section on changing your personal preferences below).

Workspace

This is the main area of the CMS where you create/add/edit/publish items and much more.

The option tabs give access to different aspects of the site and, depending on your role and the item's status, the options you see may differ.

The status bar shows the status of the current item (i.e. private, pending or published) and gives access to options that allow you to move the item to a different state in the workflow (e.g. retract, re-edit, submit/publish, ...) – again, the options you see depend on your role in the CMS.

Changing your Personal Preferences

- Click on the **my preferences** link in the utilities bar and select the link **Personal Preferences**.

The **Full name**, **E-mail** and **Default Site** options should already be filled in with your own details.

By default the **Content Editor** option is set to **EOP**, that is to using 'edit-on Pro' to edit content.

Automated email types and **Automated email frequency** control the type and frequency of emails you will receive informing you of changes in areas of the site for which you hold responsibility and/or of notifications of actions that are required by you.

By default, **Automated email types** is set to **Information & Action**:

- If you don't want to receive an email every time an editor/reviewer modifies a page, change the type of email you receive to **Action**.

And **Automated email frequency** is set to **Immediate**:

- If you'd rather receive a daily summary email than an immediate email informing you of each change and/or action required, select **Digest** from the dropdown list.

Warning!

If you choose **Never**, emails will be sent to the person immediately above you in the site hierarchy – this is likely to be the Site Administrator. As a Site Administrator you should never select this option because it would result in emails being sent to the central CMS administrators who will not be pleased about it!

- Finally, if you find the CMS to be running slowly, select the **Disable Review List** and **Disable Navigation** options – disabling these options should result in improved performance to some extent.
- Click **Save**.

After saving your new CMS preferences you will be taken to the home level where you can see a list of all the websites on the system. To return to your website, the easiest is to type its short name in the **Search titles within this folder** search box and press go (Figure 7):

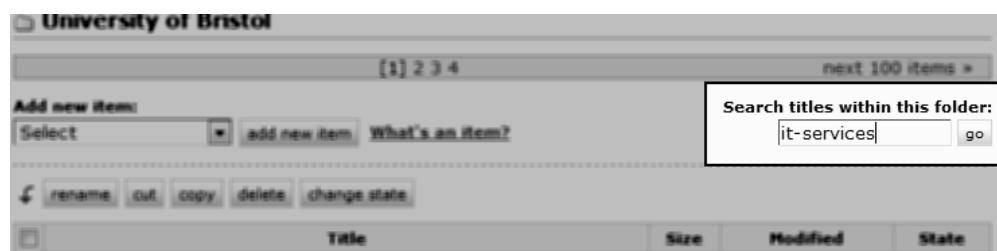


Figure 7 – Searching for your website

Using the workspace

The view tab

By default when you log in, the CMS opens in the **view** tab showing a preview of your site's homepage (Figure 8 and Figure 9).



Figure 8 – option tabs in the workspace when logged in as an Administrator



Figure 9 – option tabs in the workspace when logged in as an Editor

The **view** tab also shows the **path** to the item you are currently viewing (in the example above the **index.html** page in the **mydepartment** root folder). Items listed in the path are also links.

- To preview the page in a new browser window, click on any item within the **path**.

Note When the page is previewed within the **view** tab area the links do not work, so previewing a page in a new browser window is useful to test the links.

The folder contents tab

The **folder contents** tab displays the content of the current folder (Figure 10). This is where most of the work (e.g. creating/adding/editing/deleting/moving/etc items) in the CMS is done.

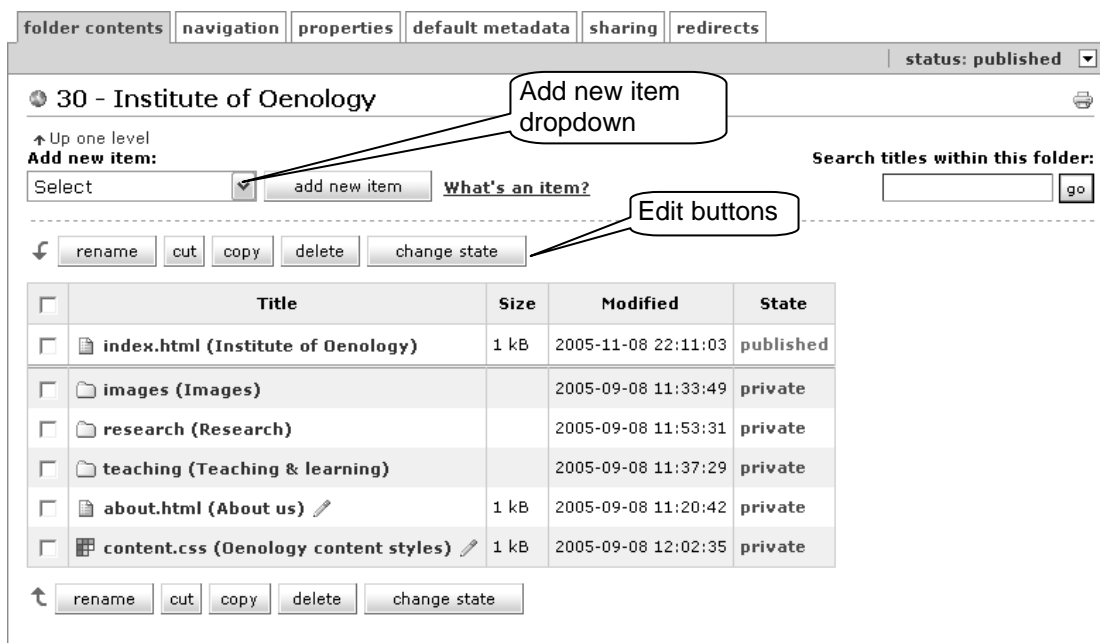


Figure 10 – the folder contents tab screen

- Use the **Add new item** drop down box at the top to add new folders, web pages, images and files to your site.

- Select items by ticking the checkbox on the left and use the edit buttons above and below the item list table to **rename**, **cut**, **copy/paste**, **delete** or **change state** of selected items.

The navigation tab

The **navigation** tab (Figure 11) allows you to edit the links in the **left**, **top** and **bottom** navigation menus.

By default, for every folder item that you create, a link to that folder will be added to the left hand-side navigation bar, and automatically appear in the **navigation** tab.

- Use the **Add new item** drop down box at the top to add other links to the navigation bars.
- Use the arrows in the **Order** column to re-order the links as you want them to appear on the page.
- Use the **left menu**, **top menu**, **bottom menu** options at the bottom of the screen to view links in the different menus (the **left menu** links are displayed by default).

Figure 11 – the navigation tab screen

The properties tab

The **properties** tab is used to set a website's global properties, for example name, address and email address of the department responsible for maintaining the site. Usually these properties are set on the local root and inherited throughout the site, however they can be overridden at folder level.

The view source tab

The **view source** is available when viewing a **Web Page** item (e.g. **index.html**) and shows the HTML for the page content area.

Tabs seen by Site Administrators only

- sharing – use this tab to add new users, assign them to a group and assign roles to groups.
- redirects – use this tab to redirect users from this item to another URL.
- revert – use this tab to revert to a previous version of the item.

Moving up and down the folder structure

To move to a different folder level, you can either use the links in the **you are here** breadcrumb (located below the utilities bar in the top left corner) or the **Up one level** link above the **Add new item** drop-down box (Figure 12).

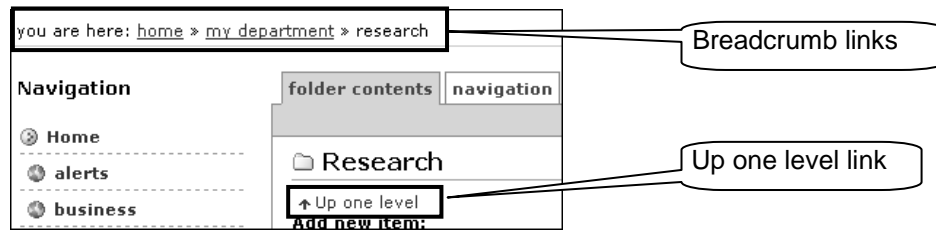


Figure 12 – moving up or down mechanisms

3. Adding new items

Objectives To create folders, web pages, and add images and files.

Comments When developing a new website in the CMS, you should start by creating the folder/page structure and adding all the images and files that you will need.

Before creating or adding a new item to your site, you need to consider:

- a. what type of item you want to add/create,
- and:
- b. where you want to add/create it.

The most common items are **Web Page**, **Folder**, **Image** and **File**. Depending on your role(s), you may see two other items, **Style Sheet** and **Advanced Web Page**.

Creating folders

Folders are the basic component for organising and structuring your website. They are used to contain content items (e.g. web pages, images, etc) and apply properties to those items. Usually you create sub-folders for core areas of your website.

- In the **Add new item** drop down list, select **Folder**, then click the **add new item** button. This takes you to the **properties** tab.

Default folder properties

- In the **Edit Folder – Folder Details** screen, enter a **Short Name** (this should be lower case, contain no spaces, underscore or special characters – for example **teaching**) and a **Title** for the folder (1 to 7 words maximum, with the first word capitalised – for example **Teaching and learning**) (Figure 13).

folder contents navigation **properties** default metadata sharing redirects

status: private ▼

Edit Folder

[default] [advanced]

Folder Details

Short Name (Required)
Should not contain spaces, underscores or upper case letters. Short Name is part of the item's web address (URL). See 'Site architecture' in the best practice guidelines.
teaching

Title (Required)
This will appear in the breadcrumb trail and the navigation.
Teaching and learning

Use the Previous or Next buttons to page between sets of properties, and save the current page. Use Save or Cancel to save or cancel the edits to the current page.

save cancel next

Created by administrator13
Last modified 2009-06-03 16:38

Figure 13– Edit Folder screen

- Click on the **save** button.

Note In most cases, the **Short name** and **Title** are the only two properties you need to set. Other properties will be acquired from the parent (or root level) folder.

Advanced folder properties

By default, most advanced properties are acquired from the parent (or root level) folder. However, you may occasionally want to override acquired properties. In this case:

- Click on the **[advanced]** link at the top, or the **next** button at the bottom right to access the **Edit Folder – Advanced Details** screen.

Note If not already in the **properties** tab, navigate to the folder whose properties you want to edit and click the **properties** tab.

The index page

For your site to work well, each folder and sub-folder must contain an index page named **index.html**. However this is the default page that will be displayed by browsers when not including a specific page name in a link, therefore linking to **/mydepartment/research/index.html** should be expressed as **/mydepartment/research/**.

In the CMS, an **index.html** page is automatically created when creating a folder.

Creating web pages

A **Web Page** item, as the name suggests is a standard web page; this is where you create the content of your site.

- In the **Add new item** drop down list, select **Web Page**, then click the **add new item** button. This takes you to the **edit** tab.

Default web page editing

- In the **Edit Web Page – Web Page Details** screen, enter a **Short Name** (this should be lower case, contain no spaces, underscore or special characters, and include the extension **.html** – for example **about.html**) and a **Title** for the page (1 to 7 words maximum, with the first word capitalised, for example **About us**).
- Optionally you may want to include a brief summary of the content of the page in the **Description** field. This information is used by some search engines for page ranking purposes, and in search result pages where it appears as link summary (Figure 14).

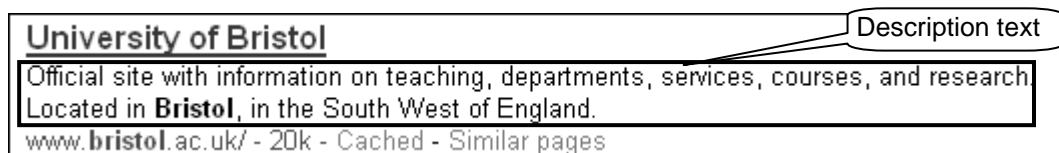


Figure 14 – Google search result example

- The **Body text** field is where you edit the page content. By default it displays the WYSIWYG editor 'edit-on Pro'.

Note See section 5. Editing web pages below for further information on content editing.

- At this point you should save your page by clicking on the **save** button.
After saving a page you are taken to the **view** tab, which shows a preview of the page. Notice that the links don't work. To see a proper preview of the page:
- Use the **path** below the **view** tab and click on the page link (Figure 15) to open the page in its own window.



Figure 15 – the view path

Advanced web page properties

Most advanced page properties are acquired from the containing or any higher level parent folder. However, you may occasionally want to override acquired properties for a specific page:

- Click on the **[advanced]** link at the top, or the **next** button at the bottom right to access the **Edit Web Page – Advanced Details** screen.

Note If you have saved the page but want to edit it again, select the **edit** tab and then the **[advanced]** link or **next** button.

Uploading images

It is good practice to keep all your site images in a dedicated folder. If there is not already one, create a new folder and call it **images** and set the **Title** property to something like **Site images**.

Note You can safely delete the **index.html** web page in this folder. You should also hide it from the navigation (go to the images folder properties, click on **[advanced]** or the **next** button and in the **Edit Folder – Advanced Details** screen find the **Visibility in navigation** drop-down list and select **Hidden**).

- In the **Add new item** drop down list, select **Image**, then click the **add new item** button. This takes you to the **Edit image – Image Details** screen.
- Starting with the **Image** field at the bottom of the screen, click on the **Browse** button. Find the image you want to upload on your computer and click **Open**.
- Then fill in the **Short Name** and **Title** fields. The **Short Name** should be lower case, contain no spaces, underscore or special characters, and include the original file extension (i.e. **.jpg** or **.gif**). Finally click the **save** button.

Note You can keep the original file name as a **Short Name** as long as it meets the naming rules, otherwise you need to rename it.

Uploading Word, PDF and other file types

In the same way that you keep all your site images in a dedicated folder, you may want to create a folder specifically to keep all your Word and PDF files in one place. Alternatively you may want to keep them in the same folder as the web pages that will link to them.

- In the **Add new item** drop down list, select **File**, then click the **add new item** button. This takes you to the **Edit File – File Details** screen.
- Starting with the **File** field at the bottom of the screen, click on the **Browse** button. Find the file you want to upload on your computer and click **Open**.
- Then fill in the **Short Name** and **Title** fields. The **Short Name** should be lower case, contain no spaces, underscore or special characters, and include the original file extension (e.g. **.doc**, **.pdf**, etc). Finally click the **save** button.

Note You can keep the original file name as a **Short Name** as long as it meets the naming rules, otherwise you need to rename it.

Creating a Style Sheet *

Cascading Style Sheets (CSS) are used to control the appearance (font, colours, layout, etc) of web pages. Your pages already link to central style sheets that are part of the template (they control the colours, layout, etc, of the header, footer, left navigation menu and the content headings and font). You cannot change these, but you can add local style sheets to control the presentation of the content area of your pages. For example if you use a lot of data tables in your site, you may want to style them consistently.

Note **Style Sheet** items can only be created by **Site Administrators** with a good knowledge of CSS. Also there is already a local style sheet (**department.css**) by default as part of the CMS template setup.

- In the **Add new item** drop down list, select **Style Sheet**, then click the **add new item** button. This takes you to the **Edit File – File Details** screen.
- Enter a **Short Name** (this should be lower case, contain no spaces, underscore or special characters and include the extension **.css** – for example **content.css**) and a **Title** (short description of the style sheet).
- Leave the **Description** field blank.
- Create your styles in the **Cascading Style Sheet** input box. Alternatively you can use the **upload a file Browse** button at the bottom to upload styles from an existing style sheet. Finally click **save**.

Creating an Advanced Web Page *

Advanced Web Page items can be used to create dynamic web pages using Python scripts and/or TAL statements. For example, you would use an **Advanced Web Page** to display automatically updating news headlines on your homepage.

Note **Advanced Web Page** items can only be created by **Site Administrators** with some knowledge of XHTML, TAL statements and Python.

- In the **Add new item** drop down list, select **Advanced Web Page**, then click the **add new item** button. This takes you to the **Edit Advanced Web Page – Advanced Web Page Details** screen.
- Enter a **Short Name** (this should be lower case, contain no spaces, underscore or special characters and include the extension **.html** – for example **stafflist.html**) and a **Title** (short description of the style sheet).
- Optionally you may want to include a brief summary of the content of the page in the **Description** field.
- Type your code in the **Body text** input box and click save when finished.

Note When you add, create or import new items, they appear in a **private** state. This means that they are only visible to you and not on the live site. In order to make them live, they need to be moved to a **published** state. This is explained in **Section 4 Managing items**.

4. Managing items

Objectives To rename, move, delete items, change their state and revert to a previous item in the history.

Comments Items can have different states in the system: **private**, **pending** and **published**. Newly created items are in a **private** state and need to be moved to **published** to appear on the live website. Also, as you update published web pages, the system keeps previously published versions which you can revert to.

Moving, renaming and deleting items

You can easily move, rename and delete items using the edit buttons above and below the items list (Figure 16).



Figure 16 – edit buttons in the folder content tab

Note You may not see the **paste** button initially; it appears after pressing the **cut** or **copy** buttons.

To rename items:

- Select the item you want to rename (by ticking the corresponding checkbox on the left) and press the **rename** button.
- In the **Rename item** screen, edit the name in the **New Short Name** field and/or the title in the **New Title** field.
- Click on the **rename** button to save the changes.

To cut or copy and paste items:

- Select the item(s) you want to rename (by ticking the corresponding checkbox on the left).

Note You can select several items and move them all at once.

- Click on the **cut** (or **copy**) button, then navigate to the new folder location where you want to paste the item and press the **paste** button.

To delete items:

- Select the item(s) you want to delete and click on the **delete** button.

Changing the state of items

As mentioned previously, newly created, imported or edited items are in a **private** state, which means they are not available on the public site and only visible to their owner and the site management. Depending on your role you can either change the state of an item to **published** or, if you have **Editor** role only, to **pending** (see the **User roles in the CMS** and **Workflow** sections in section 1, Introduction to the CMS for an explanation of user roles and item states).

There are two ways you can change the state of an item.

Using the change state button

- Select the item(s) you want to move to a different state and click on the **change state** button.

The **Publishing process – Publishing details for [item path]** screen (Figure 17) will appear.

Publishing details for /mydepartment/teaching

Affected content

Title	Size	Modified	State
teaching (Teaching & learning)		2009-06-04 14:44:53	private

Include subfolders

If checked, Plone will attempt to update all content in subfolders.

☐

Comments

Will be added to the publishing history. If multiple items are selected, this comment will be attached to all of them.

Change State

Select the new state for the selected items.

☒ No change
☐ Publish

Figure 17 – publishing process screen

- Check the **Include subfolder** option if you want to include all the items contained in a folder (this option is only available when changing the state of a **Folder** item).
- The **Comments** box is optional and can be used to document the changes you made to the item(s). These will be added to the item(s) publishing history.

The **Change State** options will vary depending on your role(s):

- A)** As a **Site Administrator**, **Editor/Reviewer** or **Reviewer** you can move most (see the note below) items directly from a **private** to **published** state.

- Select **Publish** and then click the **save** button.

Note **Style Sheet** and **Advanced Web Page** items are published in two stages: first you move the item to **pending** state before moving it to **published**. This two stage process sends an automated email informing the CMS administrators in Information Services and the Public Relations Office so that they can check these items for conformance to style guidelines if necessary

- B)** As an **Editor** only, you cannot publish items directly. You submit them for review, at which point they are moved from **private** state to **pending** state, waiting to be checked by a **Reviewer** (or **Site Administrator**).

- Select **Submit** and click on the **save** button.

Note The advantage of this method is that you can move several items to a different state at once, as well as include all content within a folder.

Using the status drop-down options

When you want to publish (or submit) an item you have just created, it may be quicker to use the status dropdown in the top right corner of the workspace (Figure 18).



Figure 18 – using the status dropdown to publish (submit) an item

- Make sure you are viewing the item you want to publish, then click on the down arrow next to **status: private** and select **publish** (or **submit**) – this may take a few seconds, so be patient!

Note If you publish a **Folder** item using this method, you will then need to publish individual items (web pages, images, etc) it contains separately.

Retracting a published (or submitted) item

Sometimes, you may want to retract an item from publication or submission, for example if you realise you forgot to include some important information in the page or made a mistake.

- Make sure you are viewing the item you want to retract, then click on the down arrow next to **status: published/pending** and select **retract** – you may have to wait a few seconds for the action to take effect.

This action will move the item back to **private** state.

Warning! When you retract a published page it is withdrawn from the public site and is therefore no longer accessible to anonymous users. This means that any link to it will be broken. Therefore when retracting a page you should also remove all links to it.

Note Only **Site Administrators** and **Reviewers** can retract an item. **Editors** can only **request retraction**.

Reverting to a previous version of a page

The CMS keeps a history of previous versions of web pages as you update them and publish updated versions. This feature allows you to easily revert to an older version of a page should you need to.

Note The system keeps a maximum of 30 versions of a document. Older versions get automatically deleted.



Figure 19 – revert tab

- View the web page you want to replace with a previous version, then select the **revert** tab.
- In the **revert** tab (Figure 19), select the version you want to revert to using the radio buttons in the **Revert** column and click on the **revert** button.

Note You can also delete previous versions by selecting the version(s) you want to delete in the **Delete** column and clicking on the **delete** button.

5. Editing web pages

Objectives To edit web page content and advanced properties, and add metadata.

Comments The CMS has a built-in visual web editor called 'edit-on Pro'. If you are not already familiar with it, please consult the reference guide entitled *Editing web content using 'edit-on Pro'*, which can be downloaded from:
www.bristol.ac.uk/it-services/learning/documentation/editonpro-1/editonpro-1r.pdf

In the CMS, you can only edit the content of **Web Page** items in the **private** state.

Editing a newly created page

To edit a page that is already in the **private** state (i.e. a newly created page as in Figure 20).



<input type="checkbox"/>	Title	Size	Modified	State
<input type="checkbox"/>	index.html (Contact us)	1 kB	2006-07-26 12:08:30	private

Figure 20 – Web Page item in private state

- Click on the page **Title** you want to edit, this will open the page in the **view** tab (Figure 21). Next click on the **edit** tab.



Figure 21 – private Web Page item opened in the view tab

In the **Edit Web Page – Web Page Details** screen:

- Unless you want to change the page **Short name** and **Title**, leave these two fields as they are.
- Enter a short summary of the page content in the **Description** field if you wish.
- The **Body text** field is where you type in and edit the main content of the page. Don't forget to click on the **save** button at the bottom to save your changes.

Warning! The CMS times out after 60 minutes of inactivity. Therefore you should save the pages you edit regularly (at least once in a 60 minute period) to avoid the risk of losing large chunks of work.

Editing an already published page

When a page is in **published** state, you need to 'create a copy' of it which you can then edit in **private** state.

- Using the **folder content** tab, navigate to the web page you want to edit and click on its **Title** to open it in the **view** tab – notice that there is no **edit** tab next to it (Figure 22).

- Click on the **status** dropdown on the right side of the green bar and select **re-edit** (Figure 22).



Figure 22 – re-editing a published Web Page item

- You can now edit the page default details (**Title**, **Description** and **Body text**), and advanced details if necessary, as before.

Inserting ready-made snippets of code into your pages

The CMS provides some ready-made snippets of code (this is called an **include file**) that you can include in your pages. For example you may want to insert **Back to top** links between sections of a long page, or a link to the **Adobe Acrobat Reader download** on pages containing links to PDF files.

Warning! You should have some basic familiarity with XHTML coding before you do this.

When editing the **Body Text** in 'edit-on Pro':

- Click on the **Source View** tab in the bottom left of the 'edit-on Pro' window (Figure 23) to view the page XHTML code.

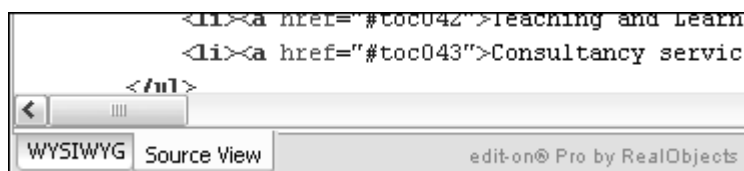
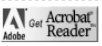


Figure 23 – selecting the Source View in 'edit-on Pro'

- Locate where you want to insert your **include file** in the XHTML code and create a new blank line (place the cursor at the beginning of the line before which you want to insert the **include file** and press **<Enter>**).
- In the new blank line, type in `<include url="/includes/filename.html" />`
- Replace **filename.html** with the correct file name from the table below:

Include file name	Description	As displayed on the page
backtotop.html	To create a 'Back to top' link.	(BACK TO TOP) ↑
adobe.html	To create a link to Adobe Acrobat Reader download.	Note: some of the documents on this page are in PDF format. In order to view a PDF you will need Adobe Acrobat Reader 
uobaccessonly.html	To indicate that a link is restricted to University staff and students only.	<i>(UoB access only)</i> [font colour is red]

The following example shows the code to include a **Back to top** link.

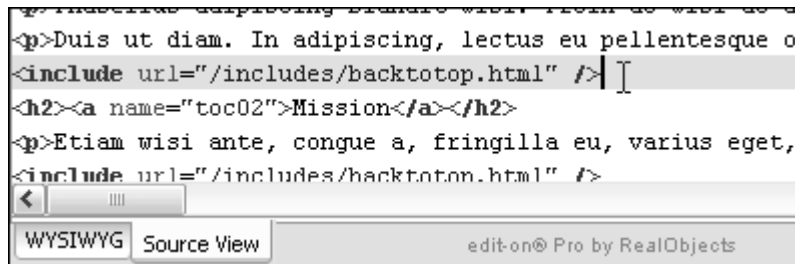
A screenshot of a code editor window. The editor displays HTML code. The visible code includes a paragraph tag, an include tag for backtotop.html, an h2 tag with a link named 'toc02' pointing to 'Mission', another paragraph tag, and another include tag for backtotop.html. Below the code, there are two tabs: 'WYSIWYG' and 'Source View', with 'Source View' being the active tab. The editor's title bar or footer indicates 'edit-on® Pro by RealObjects'.

Figure 24 – include code for creating a Back to top link

Metadata

The **metadata** tab contains information about the page, it is used to categorise and describe it. Most metadata information is acquired from the top level folder (your department root folder) or a lower level folder containing the page.

As a general rule, you don't need to override the acquired metadata, however you may occasionally want to do so:

- Navigate to the page whose metadata you want to modify and click on the **metadata** tab.
- Edit the fields you want to modify as you wish.

6. Editing the navigation menus

Objectives To add and edit links in the left, top and bottom navigation menus.

Comments Navigation menus are crucial to the success of your website because the links they contain act as signposts to its content. It is therefore important that you pay special attention to the site's navigation system.

The CMS allows you to add navigation links in the left, top or bottom menus (Figure 25).

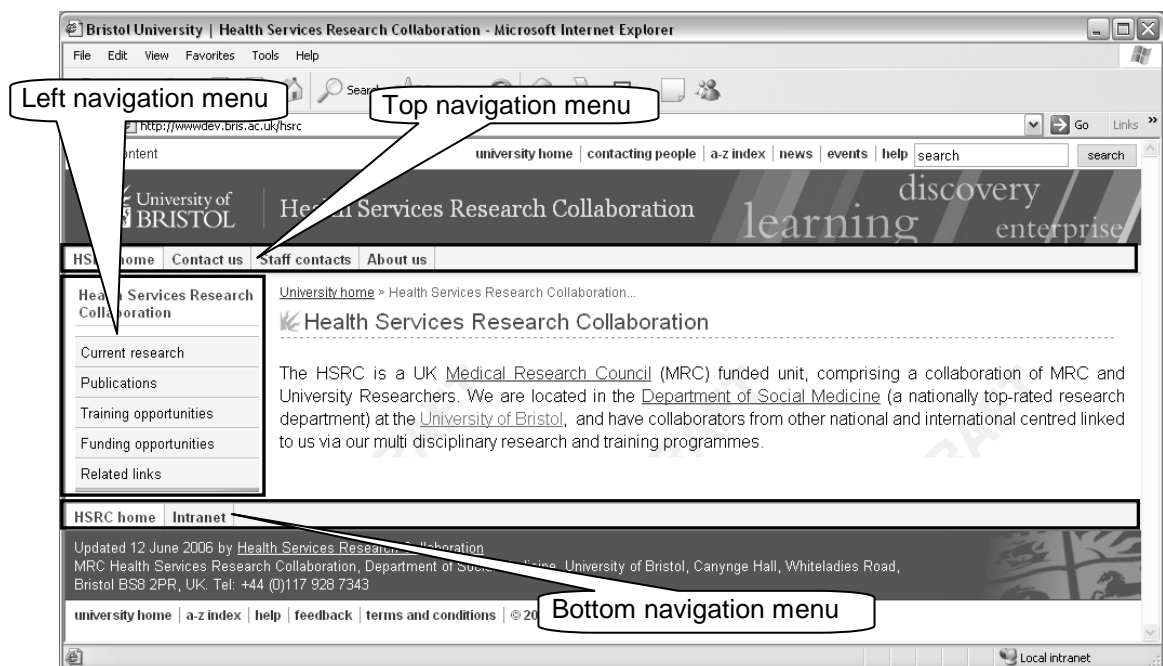


Figure 25 – top, left and bottom navigation menus

- **Left navigation menu** – This is the main menu which should contain links to the core sections of your website. By default this menu is set to be **visible** with **expanding** submenus at top folder level (i.e. your department folder) and any folder beneath it will automatically acquire these properties. The left navigation menu can be the same throughout your site or changed to reflect the content of different sections of your site (this is known as a contextual menu).
- **Top navigation menu** – This menu has two mandatory links: the first one to your site's homepage and the second to a contacts page. It can also contain other utility links, for example to a site map, FAQ, departmental news section, etc. It must remain identical throughout the site.
- **Bottom navigation menu** – This navigation bar is optional and may contain a link to your site's homepage and other useful links (e.g. finding us, intranet, etc).

Depending on what you want to do, different types of links can be added to the navigation menus. Navigation links are edited in the **navigation** tab shown in Figure 26.

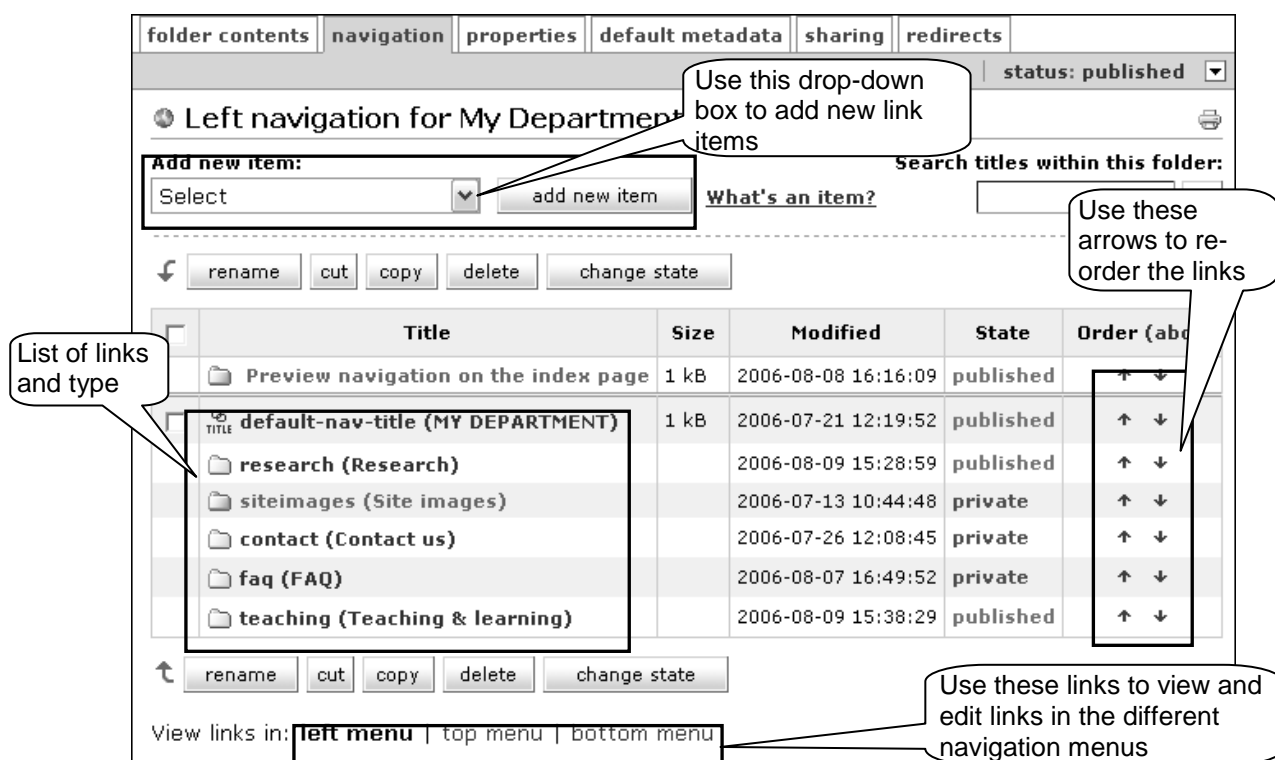


Figure 26 – the navigation tab showing links in the left menu

To add new link items:

- First select the **navigation** tab.
- Then use the **Add new item** drop-down to select the type of link you want to add and click the **add new item** button next to it (Figure 27).

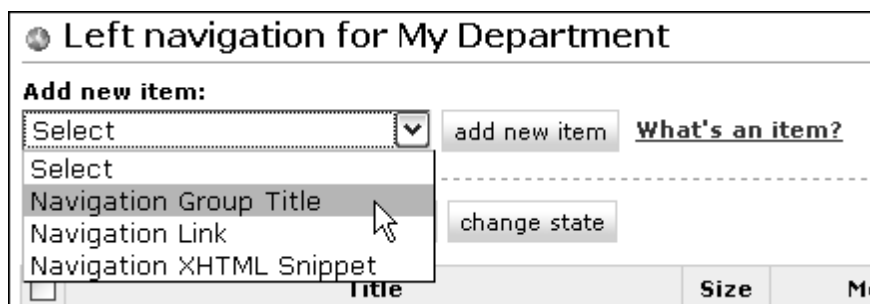


Figure 27 – adding a navigation item to the left menu

Note Just like every other item (e.g. web page, folder, etc) navigation items are created and edited in **private** state, and therefore must be published to be seen on the public site.

Adding navigation links to the left menu

Link to a Folder

Most links in the left navigation bar are created automatically by the system. When you add a new **Folder** item in the **folder contents** tab, a link to the **index.html** page of that folder is also created in the **navigation** tab. By default this link is visible in the left navigation menu and when you publish the folder and its content, it will automatically appear in the left menu bar on the live site.



Navigation Group Title

The **Navigation Group Title** allows you to group links under one banner. This is particularly useful when you have many links in the left menu (Figure 28).

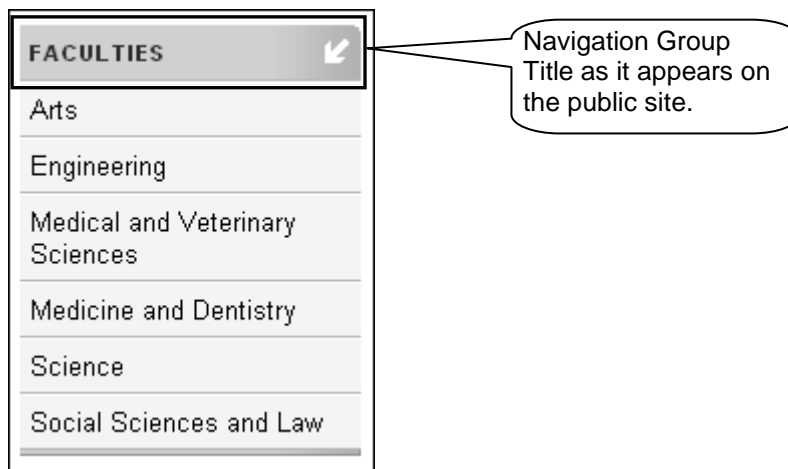


Figure 28 – example of Navigation Group Title

Note A **Navigation Group Title** item can be static or link to a page.

To add a **Navigation Group Title**:

- Make sure you are viewing the **Left navigation for My Department** screen (if not click on **View links in left menu** at the bottom).
- In the **Add new item** drop-down (Figure 27), select **Navigation Group Title** and click the **add new item** button.
- In the **Edit Navigation Group Title** screen fill in the details as follows:
 - **Short Name** (required) – The short name will appear in the **navigation** tab listing. It should be lowercase and not contain spaces or underscores. Also this name should not already be in use for another navigation item.
Example: **research-group**
 - **Group title** (required) – This is the text that will appear in the left menu on the live page. You can use several words but try to keep it relatively short. Note that it will automatically be styled as uppercase.
Example: **Research activities**
 - **URL** (optional) – If you leave this field blank then the **Navigation Group Title** will be static, but if you enter a URL then it will link to that URL.
Example: **/mydepartment/research/**
 - **Title** (optional) – Use this field to provide more information on the link – this information will be displayed when hovering the mouse pointer over the link; it is also available to screen-reader users. Use it only if the **Navigation Group Title** is a link.
Example: **Research activities in the department**

Another use of the **Navigation Group Title** item is to create a link to a sub-site homepage at the top of the left hand side navigation menu (Figure 29). This is particularly useful when you reset the left hand side navigation menu in a sub-folder.

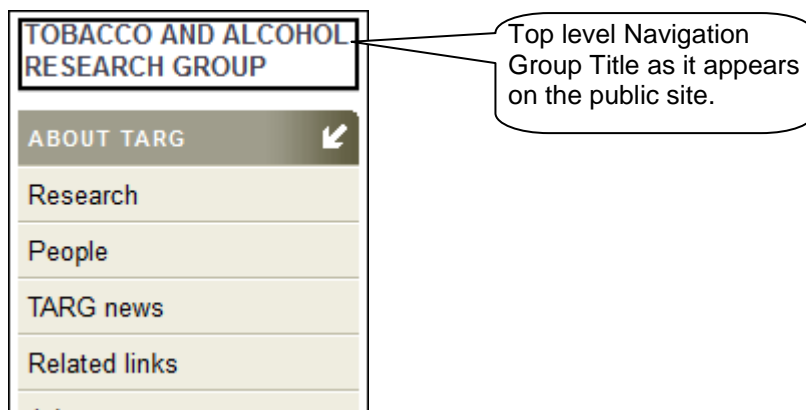


Figure 29 – Top level Navigation Group Title

In order to achieve this, you need to name the item (**Short Name**) **default-nav-title**.

Navigation Link

The **Navigation Link** item allows you to add links to web pages within your site or to external websites. For example you may want to add a left navigation link to a page called **aboutus.html** or to the BBC News website.



To add a **Navigation Link**:

- In the **Add new item** drop-down (Figure 27), select **Navigation Link** and click the **add new item** button.
- In the **Edit Navigation Link** screen fill in the details as follows:
 - **Navigation type** – Select the navigation menu where you want to place the link – **left** is the default so you should not have to change it.
 - **Short Name** (required) – The short name will appear in the **navigation** tab listing. It should be lowercase and not contain spaces or underscores. Also this name should not already be in use for another navigation item.
Example: **aboutus** or **bbc-news**
 - **Link text** (required) – This is the text that will appear in the left menu on the live page. You can use several words but try to keep it relatively short.
Example: **About us** or **BBC News**
 - **URL** (required) – The web address where the link points to. It should be the root relative path in the case of an internal link (e.g. **/mydepartment/aboutus.html**) or the full address in the case of an external site (e.g. **http://news.bbc.co.uk/**).
 - **Title** (optional) – Use this field to provide more information on the link.
Example: **Overview of My Department** or **Up-to-the-minute news from the BBC News website**

Note When you create a navigation link in a sub-folder whose **Navigation style** is set to **Acquire (Expanding)** (default), the only type of link you can add manually to an expanded left navigation menu is a navigation link. In this case you will be presented with a button saying **add new navigation link** instead of the usual **Add new item** drop-down box (as in Figure 27).

Navigation XHTML Snippet

The **Navigation XHTML Snippet** item allows you to insert a snippet of XHTML code into a navigation menu. This is useful to insert non-standard elements to



navigation menus. For example you may want to insert an image and link it to a web page.

Warning!

This is an advanced feature and should only be used by people reasonably confident with hand coding XHTML and CSS.

To add a **Navigation XHTML Snippet**:

- In the **Add new item** drop-down (Figure 27), select **Navigation XHTML Snippet** and click the **add new item** button.
- In the **Edit Navigation Link** screen fill in the details as follows:
 - **Navigation type** – Select the navigation menu where you want to place the link. **Left** is the default so you should not have to change it.
 - **Short Name** (required) – The short name will appear in the **navigation** tab listing. It should be lowercase and not contain spaces or underscores. We also suggest that you include the .html extension.
Example: **wun-logo.html**
 - **Title** (required) – Use this field to describe the snippet.
Example: **WUN logo – link to WUN website**

Adding navigation links to the top and bottom menus

Adding links to the top and bottom navigation menus is similar to adding links to the left menu. The main difference is that the type of link that can be added is limited to **Navigation Link** and **Navigation XHTML Snippet**.

To add a link to the top, bottom or both at the same time:

- In the **Add new item** drop-down (Figure 27), select **Navigation Link** or **Navigation XHTML Snippet** and click the **add new item** button.
- In the **Edit Navigation Link** or **Edit Navigation XHTML Snippet** screen, pick the location for the navigation link (i.e. top, bottom or top and bottom) from the **Navigation type** drop-down box (Figure 30).

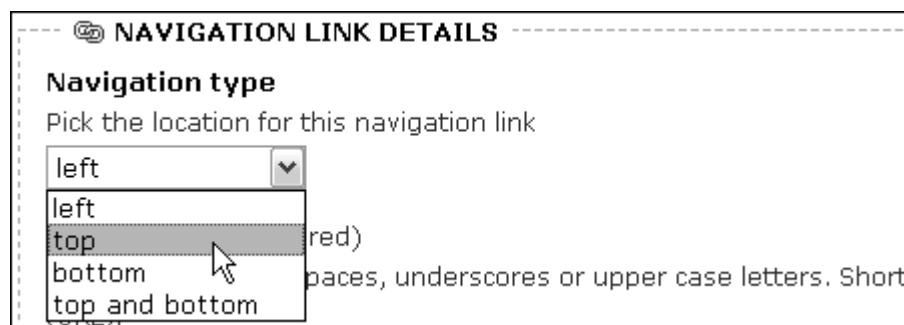


Figure 30 – selecting the location for a navigation link

- Fill in the remaining fields as for the left navigation menu.

Re-ordering navigation items

By default, when you add a new navigation item, it will appear last on the menu (at the bottom on a left menu and to the right on a top or bottom menu).

You can easily re-order links by using the up and down arrows on the **navigation** tab listing (see Figure 26 above).

To re-order links in a navigation menu:

- Select the menu whose links you want to re-order using the **left menu** (default), **top menu** and **bottom menu** links at the bottom of the screen (Figure 31).



Figure 31 – links to the different navigation menus

- Pick out a link you want to move and click on the corresponding up or down arrow to move it above the link immediately above, or below the link immediately below.
- Repeat until you have moved it to the desired position.
- Repeat for other links if necessary.

Note In the case of the **top menu** and **bottom menu**, the links that appear from top to bottom in the **navigation** tab will appear from left to right on the live site.

Editing existing navigation items

To edit the details of a link after creating it:

- Select the navigation menu (i.e. left, top or bottom) where the link you want to edit is located (see Figure 31).
- Click on the link you want to edit – this will open it in the **view** tab.
- Click on the **edit** tab. If you don't see the **edit** tab, it means the link is in **published** state. Click on the down arrow next to **status: published** and select **re-edit** to make a **private** editable copy (Figure 32).

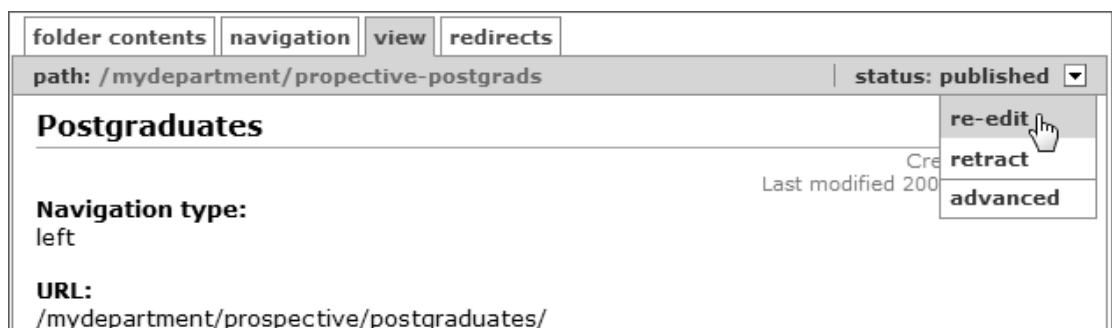


Figure 32 – creating a copy of a published link to edit it

- Edit the details as explained previously and save your changes.

Note You will need to (re-)publish the link in order to make it live or to replace the current published link on the live site with the new one.

Hiding folders from the left navigation menu

As mentioned before, links to folders are automatically created in the left navigation menu when adding new **Folder** items. However there may be occasions when you don't want a link to a particular folder to appear in the left menu.

For example you may want make a link to a folder (such as a **contact** folder) visible in the top rather than left menu. Also there is no need for an images folder to be visible in the left menu.

To hide a **Folder** item from the left navigation menu:

- In the **folder contents** tab, navigate to the folder you want to hide from the left navigation.
- Once in the folder, click on the **properties** tab and then on the **advanced** link at the top, or the **next** button at the bottom of the **Edit Folder – Folder Details** screen.
- In the **Edit Folder – advanced Details** screen, look for the **Visibility in navigation** section and select **Hidden** from the drop-down box then save the change.

The **Folder** item will now be greyed out in the **navigation** tab, indicating that it is not visible in the left menu.

Creating sub-menus for the left navigation menu

By default new CMS websites are set to create dynamically expanding links in the left navigation menu as you add new folders within existing ones. These sub-menu links appear when a link in the left hand navigation is selected, as illustrated in Figure 33.

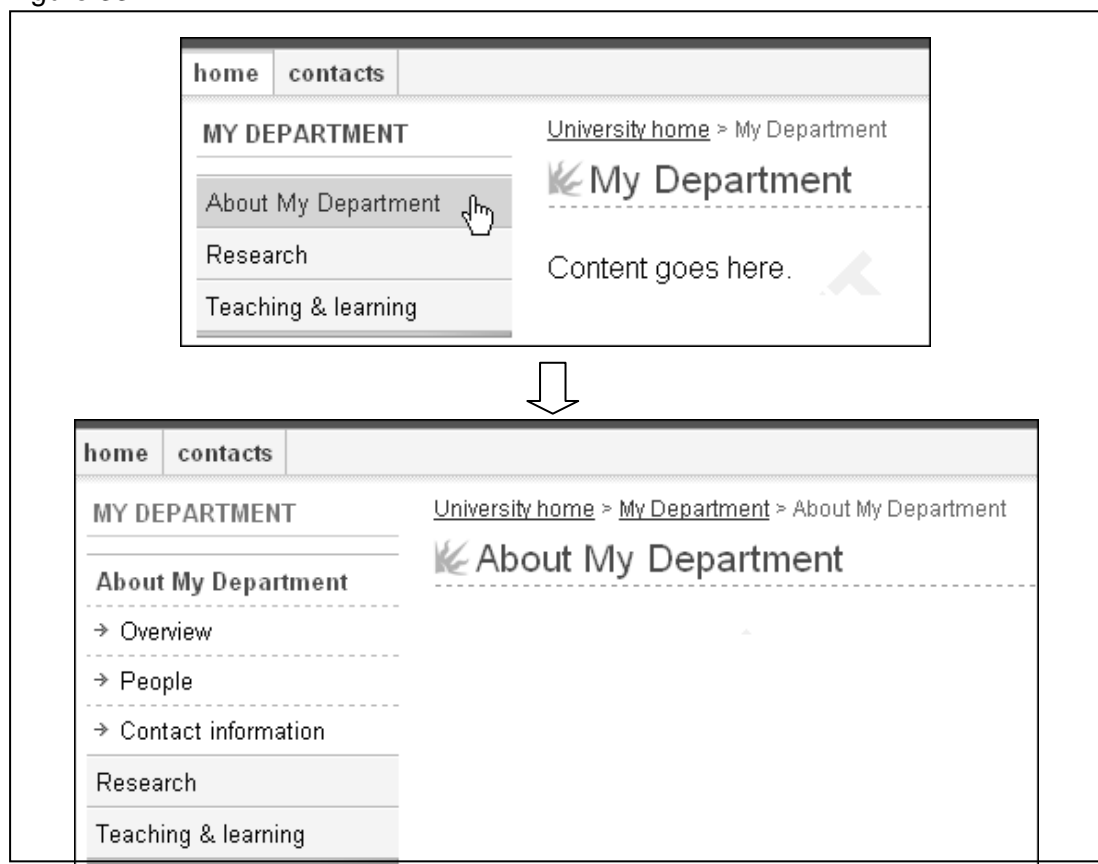


Figure 33 – example of dynamically expanding sub-menu

However there are times when you may not want links to expand but to remain static. For example you may want to treat an area of your website as a sub-site within the main site, in which case the left navigation menu should be contextual to the sub-site. Using the same example above, Figure 34 shows what a static left navigation menu looks like.

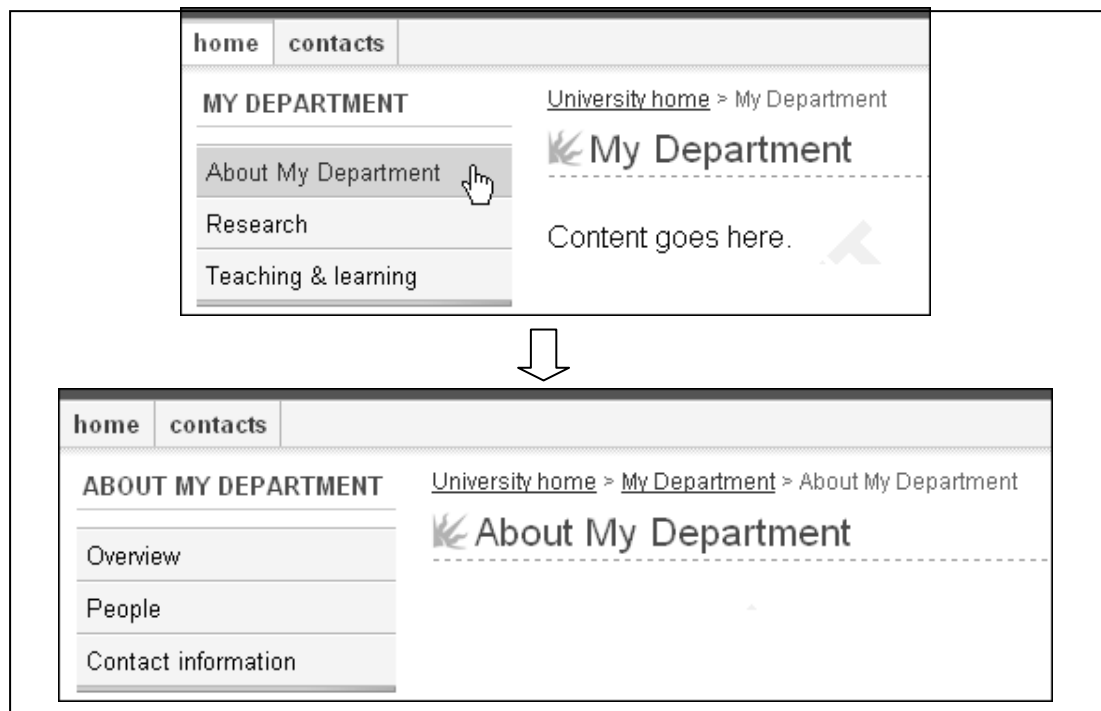


Figure 34 – example of static sub-menu

To change the left navigation menu style:

- In the **folder contents** tab, navigate to the folder whose left navigation style you want to change.
- Click on the folder **properties** tab and in the **Edit Folder** screen, click on **[advanced]**.
- In the **Edit Folder – advanced Details** screen, look for the **Navigation style** section and select **Static** from the drop-down box and save the change (Figure 35).

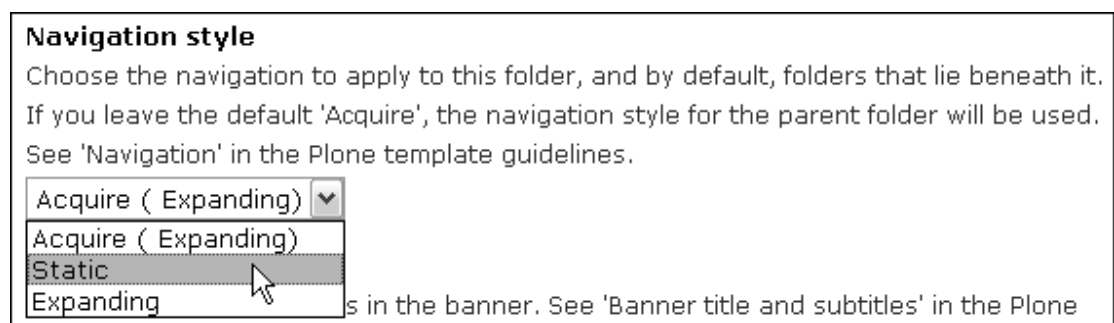


Figure 35 – changing the left navigation menu style

Note If you don't want to use dynamically expanding links in the left navigation menu throughout your site, then you should change the **Navigation style** property to **Static** on your root level folder.

Also, you can create a sub-site with an expanding left navigation menu by explicitly setting the **Navigation style** to **Expanding** rather than **Acquire (Expanding)**. This will set a new "root" for the expansion and folders beneath that section would then expand from this root.

Hiding the left navigation menu from a specific page

By default the left navigation menu is visible on all new pages that you create. However there are times when you may want to hide it and use the extra space for content.

This is particularly useful on a website's homepage, which you ought to design as a stand alone page acting as a gateway to the site.

To hide the left navigation menu from a page:

- In the **folder contents** tab, navigate to the web page on which you want to hide the left navigation menu (if on the homepage, then select the **index.html** web page in your root folder) – you should see the page in the **view** tab.
- Select the **edit** tab – if you can't see it, use the **status** drop-down on the right and select **re-edit**.
- In the **Edit Web Page** screen click on **[advanced]**.
- In the **Edit Web Page – advanced Details** screen, scroll down until you see the **Display navigation?** option and uncheck it.

Note Links in navigation menus are hidden from search engines, so it is important to include them in the main content area of index pages as well.

7. Managing groups and users *

Objectives To create groups of users, add users to these groups and assign them roles.

Comments Groups are collections of users that can be assigned different roles (**Administrator**, **Editor** and/or **Reviewer** – see section 1, Introduction to the CMS for a description of user roles).

Authorisation within the CMS is based on a user's membership of groups. It is the groups that are given role(s) and by their membership of groups, users acquire the same role(s).

* **only available to Site Administrators**

As part of the CMS template setup, your site will already have a group with **Administrator** role (named something like **mydepartment_site_administrators**). This group will have at least one member (and usually not more than 3) who can do everything on the site, including managing users with **Editor** and/or **Reviewer** roles.

Even if initially responsibility for setting up a CMS website lies with one or two site administrators, it is likely that at some point its maintenance will be devolved to different members of staff (ideally the content owners themselves). In this case more groups will be required.

For example you may want to give the Undergraduates Admissions Tutor in your department responsibility for maintaining the admissions area (e.g. **/mydepartment/undergrads/admissions/**) of the site. To do so you would need to create a new group (e.g. **mydepartment_ug-admissions_editors**) then add the admissions tutor as a member of the group and finally assign the group a role(s) (e.g. **Editor** or **Editor** and **Reviewer**) at the level of the **admissions** folder.

Creating groups

To create a new group:

- Click on **users** in the **Utilities** bar (Figure 36).



Figure 36 – users link in the Utilities bar

- Then select the **groups** tab.
- In the **Groups Overview** screen, go down to the section entitled **Groups search / edit** and click on the **add new group** button (Figure 37).

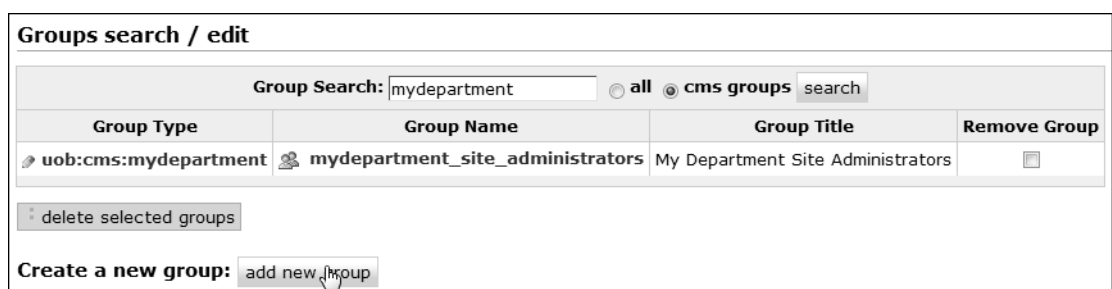


Figure 37 – add new group button

This will take you to the **group properties** tab, which is part of the groups management tabs (Figure 38).

Figure 38 – the groups management tabs

Note Groups are organised using a namespace concept. Namespaces work effectively in the same way as the web system hierarchy with the University as the root of the namespace. The four dropdown lists display the groups available in different categories:

- 1) : - groups organised by Department code
- 2) **uob:cms:** - CMS only groups
- 3) **uob:org:** - groups organised by organisational service units
- 3) **uob:role:** - groups organised by people's roles

The organisational and role groups are included since it is often the case that groups that exist outside the CMS are relevant within it. For example you may want to give all the people in your department editor role on the website.

- Fill in the **Group properties** options as described below:
 - **Short Name** (required) – This is a unique identifier for the group and cannot be changed after creation. Naming convention is **departmentname_level_role**. For example: **politics_site_editors** or **politics_ugadmissions_supeditors** ('super editors' combine **editor** and **reviewer** roles) .
 - **Title** (required) – This is a descriptive title of the **short name**. The naming convention is Department Level Role. For example **Politics Site Editors** or **Politics Undergraduate Admissions Editor-reviewers**.
 - **Description** (optional) – This is optional, but you could use it to enter a longer description of the group.
 - **Email** (optional) – You may want to set up a mailing list for the group, this is where you would enter the email address for that mailing list. For example: **mydepartment-site-editors@bristol.ac.uk**.
- Press the **save** button.

Adding users to groups

Once you have created your group(s), you need to populate them with users.

Selecting the group you want to populate:

If populating your new group straight after creating it:

- click on the **group members** tab (Figure 39)



Figure 39 – the group members tab

OR, if you want to populate an existing group:

- In the **groups** tab, go to the **Groups search / edit** section and find the group you want to populate in the **Group Name** column and click on it (Figure 40).

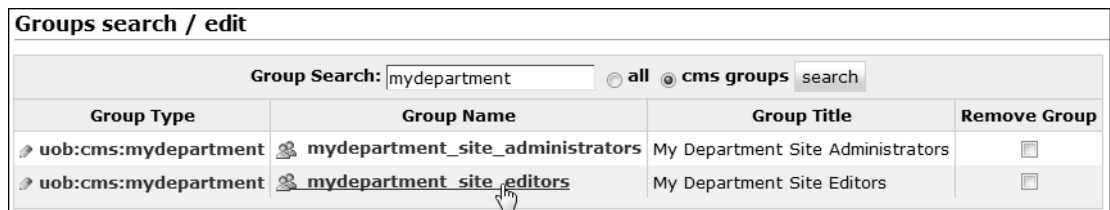


Figure 40 – selecting a group to edit/add users

You will be taken to the **group members** tab showing the 'Group Name' membership screen (Figure 41).

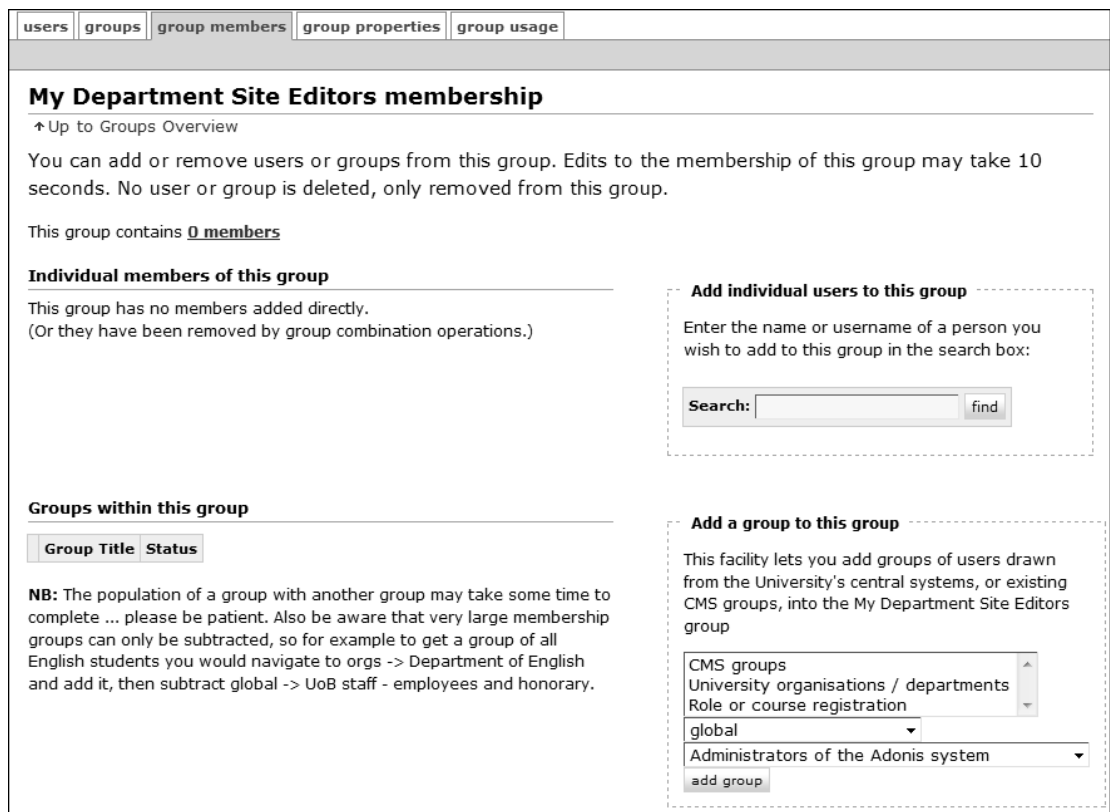


Figure 41 – group members tab view

Adding individual users to a group:

- In the **Add individual user to this group** box on the right, type the name of a person (e.g. **pat brown**, **p brown** or just **brown**) you want to add to the group in the **Search** box, and press the **Find** button.

Add individual users to this group

Enter the name or username of a person you wish to add to this group in the search box:

Search:

	Name
<input checked="" type="checkbox"/>	edgcc (Mr Gilles C Couzin)

Figure 42 – searching for people to add to the group

- Select the person by ticking the checkbox opposite their name – if the search returns several names, make sure you select the correct one – and press the **add user(s)** button (Figure 42).
- Repeat to add more users to the group if you want.

As you add users, they get listed under the **Individual members of this group** section (Figure 43).

Individual members of this group

	Name	E-mail Address
<input checked="" type="checkbox"/>	edgcc (Mr Gilles C Couzin)	Gilles.Couzin@bristol.ac.uk

[Email the people listed above](#)

Figure 43 – list of current group members

- To remove users, tick the checkbox opposite their name and click the orange **remove member(s)** button.

Adding an existing group to a group:

This facility is particularly useful when you want to restrict access to an area of a website to an existing group of University users, for example in the case of a departmental intranet. It allows you to select groups that already exist in the CMS or in the University's central systems such as the Personnel Information Management System (PIMS) or the Student Information System (SITS).

Add a group to this group

This facility lets you add groups of users drawn from the University's central systems, or existing CMS groups, into the My Department Site Editors group

CMS groups
 University organisations / departments
 Role or course registration

Faculty of Arts
 School of Arts
 Department of History of Art

Figure 44 – selecting a group to add to a CMS group

- Select the group you want to add using drop down boxes in the **Add a group to this group** box and then press the **add group** button (Figure 44).

As you add groups, they appear under the **Groups within this group** section (Figure 45).


Groups within this group		
	Group Title	Status
<input type="checkbox"/>	 Department of History of Art	Members added
<input type="button" value="remove group(s)"/> <input type="button" value="include members"/> <input type="button" value="exclude members"/>		

Figure 45 – list of current groups within a CMS group

You can check the total number of effective members that your group contains in the link at the top of the screen (Figure 46). Clicking on this link displays the full list of individual members that your group now contains.



My Department Site Editors membership	
↑ Up to Groups Overview You can add or remove users or groups from this group. Edits to the member group is deleted, only removed from this group.	
This group contains <u>320 effective members</u> , comprised of 1 individuals and 1 group(s).	
Individual members of this group	
<input type="checkbox"/>	Name
<input type="checkbox"/>	 edgcc (Mr Gilles C Couzin)
E-mail Address	
 Gilles.Couzin@bristol.ac.uk	

Figure 46 – number of effective members link

Advanced groups operations:

As well as adding existing groups to your group, you can do more complex operations, such as excluding members of one group from another group, or only including members shared by several groups.

Note Depending on their complexity, advanced group operations can be difficult and confusing to use. If you encounter problems, email web-editor@bristol.ac.uk.

For example you may want to create an intranet for all staff members in your department. Using the **Add a group to this group** facility:

- First add the member group for your department (e.g. **University organisations / departments > Faculty of Arts > School of Arts > Department of History of Art**) as described previously.

Department groups contain both staff and students, so we now need to exclude the students:

- Repeat the group selection process, this time selecting **CMS groups > global > UoB students** and click on the **add group** button (Figure 47).

Add a group to this group

This facility lets you add groups of users drawn from the University's central systems, or existing CMS groups, into the My Department Site Editors group

CMS groups

University organisations / departments

Role or course registration

global

UoB students

add group

Figure 47 – Selecting a global CMS group

This will result in members of UoB students that are also in the Department of History of Art group to be subtracted from the newly created group, therefore leaving only the department staff as group members (Figure 48).

Note Members of large global groups like UoB students or UoB staff can only be subtracted from a CMS group that you create.

Groups within this group

	Group Title	Status
<input type="checkbox"/>	Department of History of Art	Members added
<input type="checkbox"/>	UoB students	Members subtracted

☐ Only add members who are common to all the groups above (ie. the intersect)

remove group(s)

include members

exclude members

Figure 48 – University and global groups populating a departmental CMS group

- You can now check the effective membership for your new group as shown in Figure 46 on the previous page.

Assigning local roles to groups of users

The next thing that needs doing, after creating a group and populating it, is assigning it roles that will give members of that group editing and/or reviewing rights at a given level within the site. For example you may want to create a group of editor/reviewers for your undergraduate admissions sub-folder.

- Go back to your department site – the easiest is to click on **Home** in the **Navigation** bar on the left and then to use the **Search titles within this folder** search facility on the right.
- Once in your website folder, and unless you want to give your new group access at site level, navigate to the folder which you want to give it access to.
- Select the **sharing** tab.

Note The **sharing** tab is only visible to users with **Administrator** role.

- Go down to the **Add sharing permissions to groups** section and in the **Available Groups** box (Figure 49), under **CMS groups** select the group that you have created from the right-hand dropdown box.

Figure 49 – Selecting a subgroup of uob:cms: and assigning local role(s)

- Then in the **Role to assign** box select either the **Editor** or **Reviewer** roles, or both (select one, press the <Ctrl> key and select the other).
- Press the **assign local role to selected group(s)** button.

You can check that the group has been added by scrolling back up to the **Assigned Role [Department name]** box, where you will see it listed together with the **Role(s)** assigned to it (Figure 50).

	User/Group name	Role(s)
<input type="checkbox"/>	mydepartment_site_administrators	Administrator
<input type="checkbox"/>	mydepartment_site_editors	Editor

Figure 50 – list of department groups and roles

Note The **sharing** tab shows which user groups shares access rights on a particular folder and its content (i.e. web pages, sub-folders, etc):

- **Acquired roles** lists the groups that have roles assigned at a folder above the current folder and therefore also have them here.
- **Assigned roles** lists the groups that have been added at the level of the current folder.
- **Add sharing permissions to groups** allows **Site Administrators** to pick from the CMS groups they have created using the dropdown list boxes.

8. Restricting access to folders *

Objectives To restrict folder access to defined groups of users.

Comments By default folders and their content are public – i.e. they have no access restriction and are accessible by everyone. The **CMS intranet** functionality enables you to change the access policy of a folder to restrict its access to a defined group of users (for example all members of staff in a department or all University staff and students).

* **only available to Site Administrators**

There are two common uses of this facility:

- 1) to create an **intranet**; i.e. an area of a website that can only be viewed by a restricted group of authorised users (departmental staff and/or students for example),
- 2) to create a **UoB only** area; i.e. an area of a website that can only be viewed by all University staff and students.

In theory you can restrict access to any folder at any level in your site. However it is better to create dedicated folders with suitable short names.

These folders will normally be located directly inside your department root folder, but they can be created further down the folder hierarchy.

Note If you need reminding how to create folders, refer to **Section 3 Adding new items**.

Creating an intranet area

Create an intranet folder

- First create a folder with the short name **intranet** or **internal** (with the title **Department intranet** or **Staff intranet**).

Create a viewer group

If you want to restrict access to your intranet folder to **some but not all** University staff and/or students, you first need to create the group of users who will be authorised to view its content.

- Create a group and add users to this group (give it a short name like **mydepartment_intranet_viewers** and title **My Department Intranet Viewers**) as showed in **Section 7 Managing groups and users**.

Change the access policy of the folder

- In the **folder contents** tab view, navigate to the folder you want to restrict access to, and click on it to open it (Figure 51):

<input type="checkbox"/>	intranet (My Department intranet)		2007-10-08 14:47:40	private
<input type="checkbox"/>	prospective (Prospective students)		2007-05-16 16:53:00	published

Figure 51 – opening an intranet folder

- Select the **sharing** tab, and click on the link **edit the access policy** at the top (Figure 52):



Figure 52 – viewing the access policy

Note By default a folder has an unrestricted access policy – i.e. the folder and its content can be viewed by anyone once they have been published.

- In the **Access Policy** box, select **Intranet Policy** and click **save** (Figure 53):

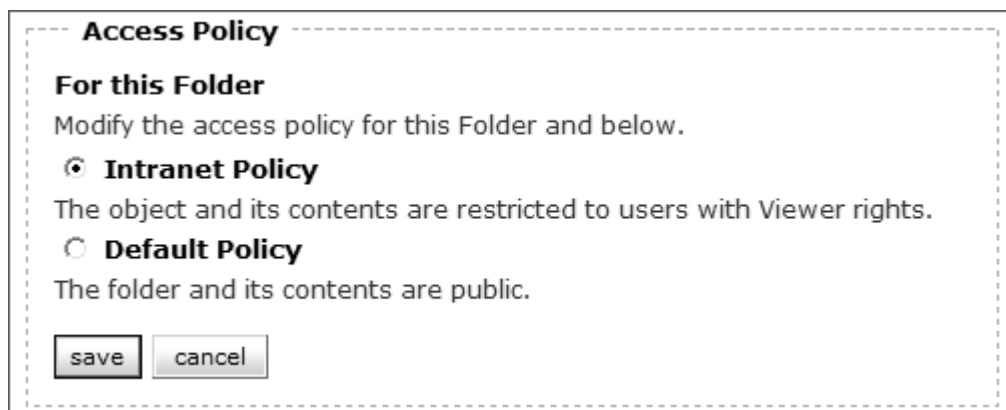


Figure 53 – changing a folder's access policy

After saving, you will be returned to the **sharing** tab view where you will see a confirmation message in an orange box.

Assign Viewer role to the intranet user group

- While still in the **sharing** tab view, scroll down to the **Add sharing permissions to groups** section (Figure 54).

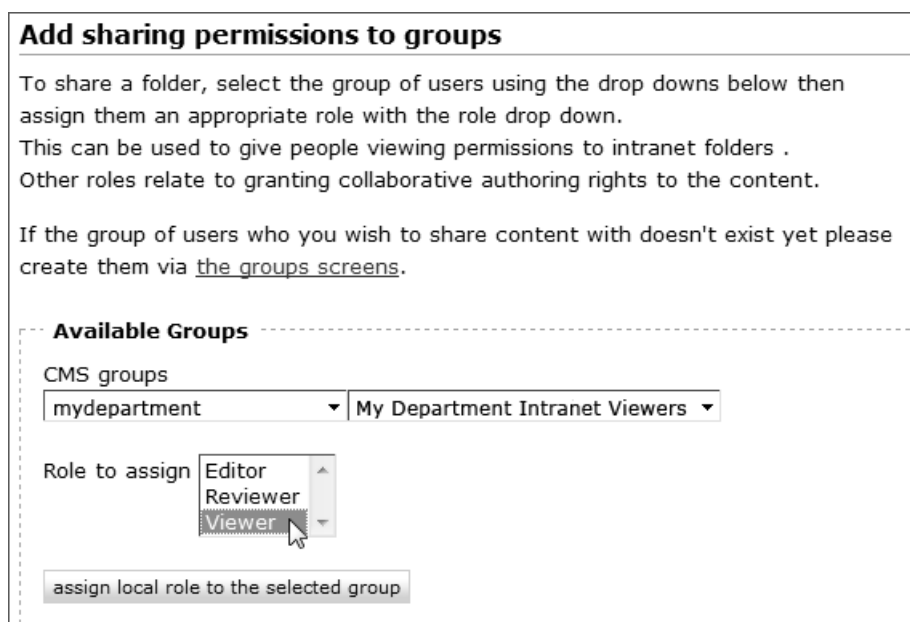


Figure 54 – adding sharing permissions to a group

- In the **CMS groups** right-hand dropdown box, select the group whose members you want to give view-only access to the folder.
- In the **Role to assign** list box, select **Viewer**.
- Press the **assign local role to the selected group** button.

Again you will see a message in an orange box confirming that the local roles have been changed.

Your intranet folder is now set up, you will need to publish it (and its contents) if you haven't already done so (see **Changing the state of items** in **Section 4 Managing items** if you need a reminder of how to do this).

- Finally, go back to your root **folder contents** tab view and notice that the icon of the intranet folder now shows a folder with a padlock (Figure 55):







	images (Site Images)		12:46:19	
	intranet (Staff intranet)		2007-09-04 10:04:45	
	prospective (Prospective students)		2007-05-16 16:52:00	

Figure 55 – padlocked intranet folder icon

Creating a 'UoB access only' area

Create an UoB access only folder

- First create a folder with short name **uob-only** (it is important that you include the hyphen) and give it a suitable title including the mention **UoB access only** in bracket (e.g. **Departmental policies (UoB access only)**)

Change the access policy of the folder

- Make sure you are inside your **uob-only** folder and go to the **sharing** tab. Then select the **edit the access policy** link at the top and select **Intranet Policy**. Save.

Note This is explained in more detail on pages 37-38.

Assign Viewer role to a global CMS group

- While still in the **sharing** tab view, scroll down to the **Add sharing permissions to groups** section (see Figure 54, page 38).
- In the **CMS groups** left-hand dropdown box, select **global**, and in the right-hand box select **Internal UoB domain users** (Figure 56).

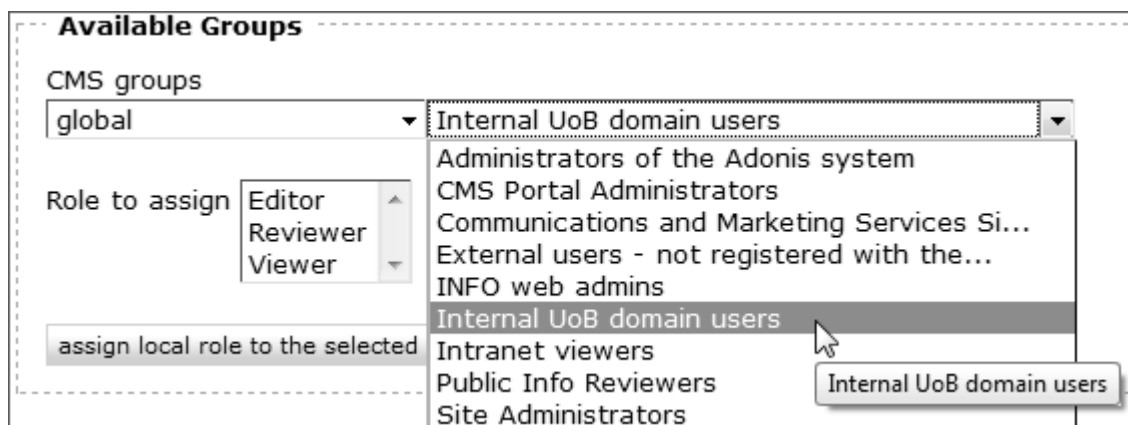


Figure 56 – sharing a folder with all UoB staff and students

Note You could select a different global group if you preferred. For example if you want only University employees to view the content of a folder, then choose **UoB employees – non-honorary staff**.

- In the **Role to assign** list box, select **Viewer**.
- Press the **assign local role to the selected group** button.

Note When creating links to your UoB access only folder in the main content area of a page (rather than in one of the navigation menu bars), you should clearly indicate that its content is only accessible to UoB users only. Please see <https://www.bris.ac.uk/web/guide/bestpractice/basics.html#toc06> (UoB only) for further information and to find the code to style a (UoB access only) message for the CMS template.

Testing your intranet folders

- Make sure you have published your intranet folder and its contents, close your browser and re-open it (or open a different one).
- Go to the public view of your site (i.e. <http://www.bristol.ac.uk/mydepartment> if it is already live, or <http://wwwdev.bris.ac.uk/mydepartment> if it is still under development).

Note While the site is on **wwwdev**, it is important that you use **bris** rather than **bristol** in the URL.

You should now see a link to your intranet folder (it has a padlock icon next to it) in the left navigation menu (Figure 57):

Note If you can't see it, try refreshing your browser by pressing the **CTRL + F5** (Refresh) if using Internet Explorer or **SHIFT + F5** (Reload) if using Firefox.

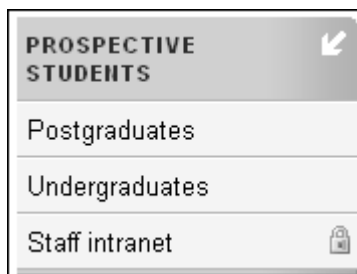


Figure 57 – link to intranet folder in the left navigation menu

Note This link can be moved to the top or bottom navigation menus if you want (see **Section 6 Editing the navigation menu** to remind yourself how to do this).

- Click on your intranet link – you should be taken to a login page.
- Follow the **Single Sign On** link and enter your UoB username and password when prompted.

To the right of the main page heading, notice your name and a logout link.

Notice also that the URL in the browser location box begins with **https**, which indicates that the page is being viewed through a secure server.