T4 Site Manager for pre-responsive templates

Self-study guide
Introduction

Is this guide for me?

The overall aim of this self-study guide is to enable web publishers to become competent users of TerminalFour (T4) Site Manager, to create and update content to University standards on the University of Bristol’s public-facing website (http://www.bristol.ac.uk).

It is intended to be used for independent self-paced learning or as a reference guide.

This document can be downloaded from www.bristol.ac.uk/style-guides/web/training/t4-training/

What will I learn?

After working through this document you will be able to:

- add, modify and manage content within existing Sections (pages);
- add new Sections (pages) and manage the site structure;
- manage site assets (e.g. images and documents) in the Media Library;
- format content (including creating links and inserting images) using the built-in visual editor TinyMCE.
- manage the left-hand side navigation menu;
- approve content for publication.

Where can I find out more?

- Site Manager training and support on the web www.bristol.ac.uk/style-guides/web/
- University web policies and governance www.bristol.ac.uk/style-guides/web/policies/
- University writing house style guide www.bristol.ac.uk/style-guides/writing/house-style/

Introduction

TERMINAL FOUR Site Manager is the University of Bristol Web Content Management System (CMS) for public-facing websites. It is a web-based tool for managing and publishing content on the University website.

It makes it easier than ever for people with no technical knowledge of the web to edit and publish web content easily and quickly.

Prerequisites

Basic IT literacy (i.e. ability to use a computer, keyboard mouse and web browser).

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How to use this self-study guide?

If you are completely new to T4 Site Manager

Work your way through the guide chapter by chapter from the beginning.
Do the activities using the training site provided for this purpose (login details are available from the Digital Communications Team (web-editor@bristol.ac.uk).

If you already use T4 Site Manager

If you are already using Site Manager and need a refresher or a quick reminder on how to do something, refer to the table of contents.
Alternatively, use the task-based checklists below to help you with some common tasks.

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| …create a new page | □ 8 Editing and formatting text in TinyMCE |
| | □ 2.1 Adding a new Section |
| | □ 3 Adding content to a Section |
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1 Getting to know Site Manager

Objectives

In this task you will:

• learn how to access Site Manager;
• learn to navigate around the Site Manager interface;
• gain an understanding of website structure in Site Manager
• gain an understanding of user rights and roles;
• gain an understanding of the Site Manager workflow

Comments

The URL to login to Site Manager is **t4cms.bris.ac.uk**.

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 web accessibility policy.

For further information on your responsibilities as a web publisher, please refer to [www.bristol.ac.uk/style-guides/web/policies/](http://www.bristol.ac.uk/style-guides/web/policies/).

1.1 Accessing Site Manager

Site Manager can be accessed on any computer within the University network or outside using a modern web browser except Internet Explorer when set to display websites in Compatibility View mode. For this reason, we recommend you use Google Chrome on University-owned PCs.

1. Open your preferred web browser and go to [t4cms.bris.ac.uk](http://t4cms.bris.ac.uk). This takes you to the Site Manager logging screen (Figure 1):

![Site Manager UoB login screen](image)

**Figure 1: Site Manager UoB login screen**
1.2 User rights and roles

In Site Manager, users can only be given one of 4 publishing roles: **Contributor**, **Moderator**, **Power User** and **Administrator** (Figure 2).

![Figure 2: User rights and roles in Site Manager](image)

The default role for all University web publishers is **Moderator**. Exceptionally some users may be granted a **Contributor** role, depending on requirements.
Things you CAN do as a Moderator:
✓ add, modify and delete content within existing Sections (web pages)
✓ add, modify and delete Sections (web pages)
✓ use the Media Library to manage site assets (e.g. images, PDFs)
✓ manage links in the left navigation menu
✓ approve content changes for publication
✓ modify the site properties.

* see note at the bottom of this page.

Things you CANNOT do as a Moderator:
✗ manage users
✗ modify the template
✗ empty the recycle bin
✗ use the Publish now feature.

1.3 Website structure in Site Manager

Sections and web pages

In Site Manager, you build your website’s structure by creating a hierarchy of ‘Sections’ (see Figure 3) which you can expand or collapse.

The best way to think of a Section is as a folder AND a web page all in one. It is a folder because it can contain other Sections (sub-Sections), AND a web page because it displays content (i.e. text and images) within it as a single page.

![Figure 3: Sample website structure in Site Manager.](image)

The Section entitled site properties is a special Section. It contains properties associated with the website (e.g. the banner title, feedback email, style sheets, etc.) and should only be edited by a qualified user (i.e. a Web Officer or Site Administrator).
Content blocks and Content Types

A typical Section (i.e. web page) consists of a content area and a Page Layout (i.e. a template that defines the styling and formatting of the header, footer and left navigation menu) that wraps around it (Figures 3 and 4).

Figure 4 – Sample page built using a single content block

Figure 5 – The same sample page built using two content blocks

Web pages are formed by adding to the content area one or more content blocks using the Content Types available to you. For example, figures –
Sample page built using a single content block 4 and 5 above show the same page created using a single content block and using two content blocks.

A Content Type defines the elements (i.e. input fields) that make up the content block and how it will be displayed on the page. For example, you can have a Content Type for general content, a different one for news articles and another one to create an image slideshow.

Standard web pages (i.e. pages requiring a simple layout and consisting mostly of linear text and possibly a few images) typically consist of a single content block using the default Content Type (named Content block).

However breaking down a page into separate content blocks gives you more flexibility for 2 reasons:

- It enables you to mirror (i.e. clone) part of the page on another page.
- It enables you to apply different Content Types to different blocks, which makes it easier to create pages with more complex layouts.

1.4 The Site Manager interface explained

Once logged in you are presented with the Site Manager screen (Figure 6) which defaults to the Show site structure screen, where you see the site(s) you can edit.

![Site Manager Contributor interface](image)

**Figure 6: Site Manager Contributor interface**

A. User Profile Options – The most useful option here is the Site Structure icon which, when clicked, reloads the default Show site structure screen. This is like a Home button and it is always safe to click on it. You can also change the text size, see your user profile (by clicking on your username), search the content of your site and log out. You may ignore the Dashboard and Content Language options.

B. Menu toolbar (Figure 7).– The Content menu contains options to add, modify and delete content, as well as access the Site Structure (same as above), the Media Library and Approval List, and Help drop-down menus. The Rights & Roles menu is of no use because users are managed centrally, so just ignore it. Similarly, the Help is not of much use, the only option of interest is the Extranet which contains generic documentation (it is not always accurate and not contextualised to the UoB environment) for contributors and moderators (to open it, right-click on it and select Open link in new tab).
C. **Current screen title** – Shows your current action (e.g. Modify Content; Add Content; etc.). **Show site structure** is the first screen you see after logging in; you can always come back to this screen by clicking the Site Structure icon in the top menu.

D. **Path** – shows the path to the current location within the site structure.

E. **Site structure** – Displays the top level (root) Section to which you have been granted access, and any sub-Section(s) within it. You can use the / signs to expand / collapse Sections that contain sub-Sections. This forms a hierarchical structure consisting of many levels.

F. **Section drop-down menu** – Pointing the mouse cursor to the down arrow opposite the Section you want to modify reveals options to add/modify/delete content within that Section, as well as preview and bookmark it. **Moderators** also see Section options.

G. **Content status columns** – The traffic lights indicate the status of content blocks within Sections:
   - **Green**: content that has been approved for publication.
   - **Amber**: content pending approval or draft.
   - **Red**: deleted content currently within the recycle bin waiting to be removed after 30 days.

   Digits indicate the number of content blocks within Sections.

H. **Toggle columns** – Click to show / hide the content status columns.
I. Widget – The Bookmarks panel enables you to create shortcuts to Sections you edit frequently. The Approval List is only available to Moderators and displays the 10 most recent items submitted for approval.

J. Bottom menu – This menu offers the same options as the top menu (see A) plus the option to bookmark the current screen (it will be listed in the Bookmarks widget).

1.5 Content approval process

The default workflow in Site Manager is quite simple:

• A piece of content can be in one of 3 states: Draft → Pending → Approved.
• When a Contributor adds a new content block to a Section, or updates an existing one, its status is set to Draft or Pending, depending which save option they select.
• Content whose status is set to Pending must be approved by a Moderator to be published on the live site.
• Moderators have the option to save and approve changes to content in one step.
• Email notification has been disabled, so Contributors have to notify a relevant Moderator to ask them to approve their changes. This can be done by email.
• Content blocks and Sections can also have the status of Inactive after they have been deleted. Content or Sections marked as Inactive are automatically removed from the system after 30 days.

Publish cycle

Site Manager publishes new or updated content at regular intervals throughout the day.

Once content has been approved by a Moderator it is included in the next available publish:

- 2:00
- 4:00
- 6:00
- 10:00
- 12:00
- 14:00
- 16:00
- 18:00
- 20:00 (Saturdays only: includes all archived content)
- 22:00

A publish will normally take up to 1 hour, which means that it can take up to 3 hours before approved content is visible on the live site.

For example, content approved at 8.05 am will be included in the 10.00 publish but will only appear on the live site sometime before 11:00 at the latest.
Managing the site structure

Objectives

In this task you will learn:

• add a new Section
• modify an existing Section
• move and reorder Sections
• delete Sections
• duplicate a Branch

Comments

The website structure defines how you organise the content of your site and Sections are its building blocks.

2.1 Adding a new Section

Sections are similar to folders so you use them to organise your content and create a hierarchical structure.

There are two ways to add a new Section in Site Manager:

• Using the Section drop-down menu – this is the easiest
• Using the Section SubSections tab

Method 1: Using the Section drop-down menu

3. Make sure you are in the Show site structure screen – if not, click on the Site Structure icon in the top menu (Error! Reference source not found.).

Figure 9: The Site Structure icon in the top menu

4. In the site structure, navigate to the Section you want to add a subSection to and select Add Section from the drop-down menu opposite (Figure 10).

Figure 10: Adding a Section using the drop-down menu
Method 2: Using the Section SubSections tab

1. Navigate to the Section you want to add another Section to (i.e. a subSection) by clicking on its name (Figure 11).

   ![Figure 11: Navigating to the Section you want to add a subSection to](image)

2. In the Section Modify Section, show details screen, select the SubSections tab and click on the + Add SubSection link (Figure 12).

   ![Figure 12: Section SubSections tab screen](image)

Entering Section details

Whatever method you choose takes you to the Add Section, Enter Details General tab screen (Figure 13).

You do not need to fill in all the fields, only the first one, Name, is mandatory. However a few other fields may be of use and these are identified in Figure 13 below (numbered from A to F) and explained.
A. **Name (mandatory):** This should be descriptive of the Section as it will typically appear in the left navigation menu and the breadcrumb trail on the live site. Use sentence capitalisation to comply with University house style (e.g. Short courses, not Short Courses).

B. **Output URI (highly recommended):** The Unique Resource Identifier (URI) enables you to specify the path to the page as it will appear in the web address. If left blank, the Name will be used instead and will be automatically converted to a web safe path (i.e. lowercase and any space replaced by a dash).

If left blank, the Name will be used instead and will be automatically converted to a web safe path (i.e. lowercase and any space replaced by a dash).

It is recommended that you specify the Output URI to avoid problems if you were to modify the Name later. It should be lowercase and spaces between words replaced by a dash.

For example:

<table>
<thead>
<tr>
<th>if the Name is:</th>
<th>the Output URI could be:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short courses</td>
<td>short-courses</td>
</tr>
<tr>
<td>Research themes</td>
<td>themes</td>
</tr>
</tbody>
</table>

C. **Description (highly recommended):** Use this field to provide an up to 160 characters summary of the content of the page. This text will be added to the page as metadata and will appear under the URL of the page in search
engine results pages (SERPs). Every page should have its own meta
description and it should be unique. See https://goo.gl/S6FivF for more
information.

D. Status (optional): There are three status levels for Sections:
   • Approved – is the default status for a new Section, which means that
     the Section will be published provided it contains at least one approved
     content block.
   • Pending – displays the Section with a yellow background on the site
     structure and can be used to publish its content all at once (you need to
     approve all content first and then change the Section status to Pending).
   • Inactive – indicates that the Section has been deleted and will therefore
     be removed after 30 days.

E. Show in navigation (optional): if you want a link to the Section to appear
   in the left navigation menu then ensure it is selected (default). If not,
deselect it.

F. Archive Section (optional): Use this option for Sections that are no longer
   updated and do not require to be published every time (e.g. a research
   project that has ended, news from past years). An archive Section will still
   be visible on the live site.

Click Add when done.

Try it:

Create a new practice Section:
   ➢ After logging in to the training site (as explained on page Error!
     Bookmark not defined. above), add a Section at the top level using
     your own surname and firstname to name it, as follows:
     • Name: Surname Firstname (e.g. Smith John)
     • Output URI: surname-firstname (e.g. smith-john)
     • Description: e.g. John Smith’s practice Section on T4 Site
       Manager.
     Leave all other options as they are.
   ➢ Add 2 or 3 more Sections within the one you just created, for example:
     • About me
     • Interests
     • Contact
     • Resume

2.2 Modifying an existing Section

To modify an existing Section:

1. Starting from the Show site structure screen, navigate to the Section you want
   to modify (alternatively expand the Section drop-down menu opposite the
   Section you want to modify and select Modify Section).
5. In the Modify Section, Show Details screen > General tab, make your changes in as illustrated in Figure 13 above.

6. Click Update to save your changes.

### 2.3 Deleting a Section

1. In the Show site structure screen, expand the Section drop-down menu opposite the Section you want to delete and select Delete Section (Figure 14).

   ![Figure 14: Deleting a Section](image)

   A pop up warning will appear asking you to confirm whether you want to proceed or cancel.

2. Click OK in the Delete Section screen to confirm.

   The deleted Section will be clearly marked in a red box with a pink-ish background (Figure 15).

   ![Figure 15: Deleted Section in the Site Structure](image)

   **Warning**

   The Delete command is misleading in Site Manager because it does not actually delete the item, instead it changes its status to Inactive, which effectively marks it for ‘recycling’.

   Sections marked as Inactive are still visible for a while, until they get ‘recycled’ (i.e. permanently removed), 30 days after being deleted.
Restoring Sections marked as inactive

Just like ‘deleted’ content, a ‘deleted’ Section can be re-instated as long as it has not been recycled.

1. Click on the deleted Section’s name in the Site Structure and in the Modify Section, Show Details screen > General tab, select Pending or Approved from the Status drop-down (Figure 16).

![Figure 16: Re-instating an Inactive Section](image)

7. Click Update.

2.4 Moving a Section

There are two ways you can move a Section.

- drag and drop
- using the drop-down arrow opposite the Section you want to move.

**Method 1: drag and drop**

This is the easiest method.

1. Starting from the Site Structure, expand the Sections until you see the Section you want to move and the one you want to move it to.

8. Click and hold the Section you want to move and drag it over its new location until you see a light blue box around it. Release the mouse button to drop it (Figure 17):

![Figure 17: Moving a Section using "drag and drop"](image)

A pop up will prompt you to confirm the action.

9. Click OK to confirm (or Cancel if you change your mind).
Method 2: Using the drop-down arrow Move Section option

1. In the Show site structure screen, expand the Site Structure until you see the Section you want to move.

10. Point to the Section Drop-Down Menu opposite and select Move Section (Figure 18):

![Figure 18: Moving a Section using the drop-down arrow menu](image)

11. When prompted, select the new location for the Section.

2.5 Duplicating a branch

Duplicating creates a copy of a Section and all its sub-Sections anywhere in the site.

There is not much difference between a Section and a Branch. The latter simply refers to a Section and all the sub-Sections within it, implying that it is not possible to duplicate (or move for that matter) a Section without also including any sub-Section inside it.

1. Expand the site structure until you see the Section you want to duplicate.

12. Point the mouse cursor to the drop-down arrow opposite the Section to be moved and select Duplicate Section.

This takes you to the Duplicate Branch screen which contains a number of options (Figure 19):

![Figure 19: Duplicate Branch screen](image)
13. Under the **Duplication Options** heading, select the relevant options:

- **Section to Copy Into**: click on **Select** on the right and navigate to the Section you want to copy the duplicate into.

- **Content Options**: select **Duplicate Content** from the drop-down on the right if you want to include all content blocks contained within the Section and its sub-Sections.

- **Retain Section/Content Link Targets**: select to make sure any link to other Sections or content blocks are updated.

- **Copy Page Layout Usage**: select to ensure any page layout applied to the existing branch are applied to its duplicate.

- **Copy User Access Rights**: select if you want the same contributors to edit the duplicate.

- **Copy Content Type Access Rights**: select to ensure all Content Types associated with the existing branch are also available for its duplicate.

- **Copy WebDAV Rules**: leave this option unchecked.

14. Click **Duplicate**.

A confirmation message will appear at the top of the screen.

**Try it:**

Following the instructions above:

- Try to delete, move and duplicate a Section.
3 Adding content to a Section

Objectives
In this task you will learn:
- how to add content to a Section
- about Content Types and how to choose between different Content Types
- about the Content tabs
- how to enter text using TinyMCE
- how to preview newly added content

Comments
Remember that a Section is the same as a web page; content is what you add to a Section / page. As a Contributor you can add content to existing Sections but you cannot create new Sections / pages.

3.1 Methods for adding a new content block to a Section

There are 3 slightly different ways to do this in Site Manager:
- using the Section drop-down menu;
- using the Section Content tab;
- using the Content menu.

It is useful to be aware of all of them, although in practice you may have a preferred one.

Method 1: using the Section drop-down menu

1. Make sure you are in the Show Site Structure screen – if not, click on the Site Structure icon in the top menu (see Figure 6 in Section 1.4).
2. In the Show site structure screen, navigate to the Section you want to add content to and point the mouse cursor to the drop-down menu opposite, then select Add Content (Figure 20).

Figure 20: Adding content using the Section drop-down menu
Method 2: using the Section Content tab:

1. In the **Show site structure** screen, navigate to the Section you want to add content to (use the icon to the left of each Section if necessary). When you have located it, click on its name (Figure 21).

![Figure 21: Selecting the Section you want to add content to](image)

   This takes you to the Section **Content** tab in the **Modify content, select content** screen.

2. In the Section **Content** tab, click on the **+ Add Content link** (Figure 22):

![Figure 22: Section Content tab screen](image)

Method 3: using the Content menu

1. Point the mouse cursor to the **Content menu** (not to be confused with the **Content tab** showed above) and select **Add Content** (Figure 23).

![Figure 23: Adding content using the Content drop-down](image)
2. On the Add Content, choose a Section screen, navigate to and select the Section you want to add content to (Figure 24).

![Figure 24: Choose the Section you want to add content to](image)

3.2 Choosing a Content Type

Whichever of the 3 methods described above you choose, you will then be prompted to choose a Content Type (Figure 25):

![Figure 25: Choosing a Content Type](image)

READ THIS BEFORE CONTINUING:

The University website is currently in the process of being made compatible with (i.e. ‘responsive’ to) mobile devices. While this is happening there are two flavours of the template available: the original, non-responsive template and the new, responsive one.

1. If your site uses the non-responsive template, then use the default content type, named Content block. This is the one used in the present document.

2. If your site uses the responsive template, then you will have a choice of 9 different content types. In this case, refer to the separate training guide, Publishing responsive web content in T4 Site Manager, which explains how to use them.

It should be obvious which to use, but if in doubt, contact web-editor@bristol.ac.uk
1. Unless you’ve been told otherwise, choose **Content block** under the Global category (see Figure 25).

You now see the **Add content, enter content details** screen > **Content** tab (Figure 26) consisting of a number of input fields.

2. Fill in the form fields.

These will vary depending which **Content Type** you use, but for the standard **Content block** these fields are:

- **Name** – The name of the content block as it will be referred to in Site Manager. This field is mandatory but it is not visible to users of the website. You can use the same text as for the **Title** to which you should append **[main]** to indicate that this is the main (and possible unique) content block in the Section (e.g. Study [main]).

- **Title** – This field is will appear at the top of the page, as a heading level 1 (h1). It is optional although in most cases you will want to include it. Make it as descriptive as possible of the page content (e.g. Study).

- **Body text** – This is where you type in the content itself. By default, this field uses the TinyMCE visual editor. Using the editor is covered in detail in Error! Reference source not found..

- **Keywords** – Optionally you can specify keywords for the content block. Use a comma to separate keywords. Note that their sole purpose is to make it easier to search for a particular content block in Site Manager.

![Figure 26: Entering details into the Content Type fields](image)

- Whenever you see the icon [1] on this screen there is a tool tip available; just point the mouse cursor to it and a tool tip will pop up (Figure 27).
3. Optionally preview your work by clicking on the **Preview** button (see Figure 28) – the preview opens in a new browser tab.

If nothing happens when you try to preview a page, it means your browser is set to block pop up windows.

In Google Chrome, look for the pop-up blocker icon at the end of the location bar and select **Always show pop-ups from https://t4cms.bris.ac.uk**, click **Finished** then try to preview again.

4. Save your work by choosing one of the 3 following options – the default is **Add**, you need to point to the down arrow to see the other two:

   ![Saving options when adding content](image)

   - **Add** saves the content block and submits it for approval (it will then need to be approved separately) – its status is set to **Pending** and it is saved as **Version 0.1**.
   - **Add & Approve** saves and approves the content block for publication in one step – its status is set to **Approved** and is saved as **Version 1.0**.
   - **Save as Draft** does exactly that – the status of the content block is set to **Draft** and it is saved as **Version 0.0.1**.

After saving you will see your new content block listed under the **Section Content** tab (Figure 29).
You will also see confirmation that the content has been added successfully in the shape of a green message box at the top of the screen.

### 3.3 Previewing content

The easiest way to preview content once you have added it or saved it as draft is to use the drop-down arrow opposite the content block or Section and select Preview (Figure 30).

Figure 30: Previewing a content block

This opens a preview of the published page in a new browser tab (Figure 31). It shows you what the page will look like on the live site.

Figure 31: Preview of published page
Try it:

**Add a content block the Sections you created earlier:**

- Using any of the methods described above, add a content block to the Sections.

  **Tips for naming:**

  **Name:** use the same name or an abbreviation of the Section name and add *main* to indicate this is the main content block (e.g. *John Smith (main)*; *About me (main)*)

  **Title:** use the same as for the Section (e.g. *John Smith’s site*; *About me*)

  **Body text:** type a few words (copy and paste sample text from *lipsum.pro* if you want)

  **Keywords:** ignore.

- Before adding (or saving as draft), preview the content that you created if you wish.
4 Modifying content

Objectives
In this task you will learn:

• to edit existing content using the Modify Content option

Comments
In the same way that there are a few options for adding new content, there are different options for modifying existing content.

4.1 Methods for modifying existing content

In the same way that you can add content using three different methods in Site Manager, you can modify existing content using similar methods:

• using the Section Content tab;
• using the Section drop-down menu;
• using the Content menu.

Method 1: using the Section Content tab

1. Expand the site structure until you see the Section containing the content block you want to modify.

2. Click through on the Section name (Figure 32)

![Figure 32: Clicking through the Section to edit its content](image)

3. In the Modify content, select content screen, do one of the following:
   i. Click on the content block you want to edit (Figure 33).

![Figure 33: Choose the content block you want to edit](image)

or:

   ii. Point the mouse cursor to the down arrow of the content block you want to edit and select Modify (Figure 34)
Method 2: using the Section drop-down menu

1. Expand the site structure until you see the Section containing the content block you want to modify.
2. Point the mouse cursor to the Section drop-down menu, then select Modify Content (Figure 35):

Method 3: using the Content menu

1. Point the mouse cursor to the Content menu and select Modify Content (Figure 36).
2. Next, in the Modify content, choose a Section screen, navigate to and select the Section you want to add content to (Figure 37).
3. Do step 3 of the first method.

4.2 Modify content, update details screen

Whatever method you choose, they will open the Modify content, update details screen (Figure 38).

1. Make any change you need to make to any element of the content block (e.g. Name, Title, Body text).

2. Save your changes by choosing one of the 3 following options – the default is Update, you need to point to the down arrow to see the other two (Figure 39).

Try it

Modify content you created earlier:

- Using the any of the options described above, modify 2 or more of the content blocks that you created in Task 3.
4.3 The Add/Modify content tabs

When you add a new content block (or update an existing one) you see the Content tab (see Figure 26 above) by default. However, there are five other tabs alongside (Figure 40).

**General Information**

The General Information tab (Figure 41) shows which Content Type is being applied to the content.

**Placement**

When you have 2 or more content blocks in a Section, the Placement tab (Figure 42) allows you to re-order them.

By default, content blocks are ordered in chronological order (i.e. the newest at the bottom).
Channels

The Channels tab (Figure 43) allows you to select which channel(s) the content will be published to.

Channels allow sites to be published in different formats for different outputs. For example, in addition to a standard web channel, we may have a mobile channel, a tablet channel and a training channel.

**To note**

Note there is another, easier, way to re-order content blocks, using the Move up and down arrows in the Modify content, select content screen.

Options

The Options tab (Figure 44) allows you to optionally assign publish and expiry dates to content blocks to ensure that they are published, unpublished, reviewed or archived at the right time.

Figure 43: Add/Modify content, Channels tab

Figure 44: Add/Modify content, Options tab

Content that has reached its expiry date is clearly marked as *Expired.*
When a review date has been set, the last person to have modified the content will be notified by email.

**Linked Content**

The **Linked Content** tab (Figure 45) shows which other content blocks within Site Manager (if any) have a hyperlink to this particular content block.

Note that this tab is displayed only when modifying an existing content block, not when adding a new one (since it would not be possible to link to a content block before it was created).

![Figure 45: Modify content, Linked Content tab](image)
Managing content

Objectives

In this task you will learn:

• to delete content
• to move, duplicate and mirror content
• to re-order content blocks
• to view content history and compare versions
• to bookmark content

Comments

The ability to ‘mirror’ content is particularly useful as it enables you to re-use content you want to appear on different pages while maintaining it in one place.

5.1 Deleting content

To delete content, do the following:

1. Navigate to the Section which you want to delete content from. Once you have located it, click on its name in the Site Structure (Figure 46):

   ![Figure 46: Locating the Section containing the content to be deleted]

   Click on the section name

2. In the Content tab of the Modify content, select content screen, point the mouse cursor to the down arrow to the right of the content block you want to delete and select Delete from the drop-down (Figure 47):

   ![Figure 47: Selecting content for deletion]
A pop up warning will appear asking you to confirm whether you want to proceed or cancel.

If you click OK you will get a confirmation message this particular content block has been set to Inactive (Figure 48):

![Content Management](image)

Figure 48: Confirmation of Status changed to Inactive

Remember that the ‘delete’ command is misleading in Site Manager because it does not actually delete the item, instead it changes its status to Inactive, which effectively marks it for ‘recycling’.

Content blocks marked as Inactive are still visible and can be reinstated. However, the system will automatically ‘recycle’ them (i.e. delete forever) after 30 days.

Restoring content marked as inactive

‘Deleted’ content can be restored as long as it has not been recycled.

1. Locate the deleted content block as explained above (see Figure 46).
2. Click on the name of the content block you want to restore to modify it (Figure 49):

![Existing Content](image)

Figure 49: Opening the content block to be modified

3. In the Modify content, update details screen, select Update or Save as Draft (Figure 50):
The content block status will now show as **Pending** or **Draft**.

### 5.2 Moving, duplicating and mirroring content

As well as deleting content, you can move, duplicate and mirror it:

- **Move** – means cutting a content block from one Section and pasting it in another
- **Duplicate** – means creating a copy of a content block and pasting it in the same or a different Section. The copy and original are independent from each other, so changes made to one will not affect the other.
- **Mirror** – is similar to **Duplicate** except that all copies are linked to each other. In other words, any changes made to the original or any of the mirrored copies will be reflected in all other copies, so that they are always identical.

#### To move, duplicate or mirror content:

1. Click on the **Site Structure** icon in the top menu (or in the **Content** menu drop-down).
2. In the **Show site structure** screen navigate to the Section you want to move, duplicate or mirror content from, and either:
   - select **Modify Content** from the yellow drop-down menu opposite the content,
   - or
   - click through the Section **Name**.
3. In the **Content** tab, point the mouse cursor to the yellow drop-down arrow menu opposite the content block and select the relevant option (Figure 51):

   ![Figure 51: Moving, duplicating or mirroring content](image)

4. In the **Move/Duplicate/Mirror content, select destination** screen, navigate to the Section you want to move the content to and click on its **Name** (
Mirrored content is identified by a little red ‘snowflake’ icon next to its name.

Pointing to the snowflake will show you a list of Sections where the content also appears.

To remove mirrored content from one or more Sections:

It is possible to remove mirrored content from any Section in which it appears, as long as you keep it in at least one Section.

1. Go to the Section containing the mirrored content block you want to remove.
2. In the Content tab, point the mouse cursor to the yellow drop-down menu opposite the content block and select **Delete** (Figure 53):
3. Click **OK** when asked “Are you sure you want to delete this content?” (or **Cancel** if you’ve changed your mind!).

4. In the **Confirm Content Deletion** screen (Figure 54), you are given 2 options:

   - **Remove from Section** (default): select this option if you want to remove the mirrored content from this Section, but keep it in others.
   - **Delete Content**: will make all mirrored instances of the content (including the original block) **inactive** and mark it for ‘recycling’ (i.e. permanent deletion)

5. Choose the option you want (or keep the default one) and click **Confirm**.

---

**Try it**

Following the instructions above:

- try to delete, move, duplicate and/or mirror a content block.
- at the end, try to remove a mirrored content block from one of the Section in which it appears.

---

### 5.3 Re-ordering content blocks

You can re-order content blocks within a Section/page in one of two ways:

- Using the **Placement** tab (see Section 4.3 above)
- Using the up and down arrow in the Section **Content** tab.

We recommend you use the latter, explained below, as it is much easier.
1. Go to the Section (i.e. click on its name or select Modify Section from the Section drop-down menu) whose content blocks you want to re-order and select the Content tab.

![Accessing the Modify Section > Content tab](image1.png)

Figure 55: Accessing the Modify Section > Content tab

2. You have two option to reorder content blocks: manual ordering (default) or automatic ordering. By default, use manual ordering as it gives you complete control, but automatic ordering can be useful for A-Z index type pages (e.g. list of countries, people).
   
   i. **Manual ordering**
   Use the up and down arrows under the Move column to move content blocks one place at a time (single arrow) or to the top/bottom of the list (double arrow).

![Using the Move arrows to reorder content blocks](image2.png)

Figure 56: using the Move arrows to reorder content blocks

ii. **Automatic ordering**

![Using Automatic Ordering to reorder content blocks](image3.png)

Figure 57: using Automatic Ordering to reorder content blocks
Enable **Automatic Ordering** (1). Then choose which content block it should apply to (2) by either unlocking individual blocks or all of them (click on the open padlock to do this). Finally, select the **Method** (*Alphabetical (A-Z)* by default) using the drop-down (3).

3. When done, click **Save Changes**.

### 5.4 Viewing content history and comparing versions

**To view content history:**

1. Navigate to the Section containing the content you want check the history of (hint: start from the Show Site Structure screen).

2. Either click on the yellow drop-down arrow opposite the relevant Section and select **Modify Content**, or click through the Section name.

3. In the **Content** tab, click on the drop-down arrow opposite the relevant content block and select **History** (Figure 58):

![Figure 58: Accessing the history of a content block](image)

The **History** tab in the **Modify content, update details** screen (Figure 59) shows the editing history for a particular content block (e.g. name, version, last modified, etc).

![Figure 59: Modify content, History tab](image)

You can also preview a particular version in a different tab by clicking on **View**, and to set an older version as the active one by clicking the **Set Active** link.
To compare two versions:

Once in the Modify content > History tab (see Figure 59 above), you have two options to compare 2 versions at a time:

- **Content Comparison**
- **Visual Comparison**

1. Select the two versions you want to compare by ticking the relevant check boxes in the **Compare** column, then choose the comparison mode:

**Content Comparison**

2. Click on the **Content Comparison** button and in the **Compare** screen (Figure 60), first select the field you want to compare (this will usually be the **Body text**).

3. Then click on **Text** or **HTML** (choose the former if all you want to do is compare the text; if you also want to compare HTML tags, then choose HTML).

**Visual Comparison**

2. Click on the **Visual Comparison** button.

This opens the page in preview mode highlighting what has been added in green and/or removed in red between the two versions.
### 5.5 Bookmarking pages (Sections)

Bookmarking allows you to create shortcuts to Sections that you work on regularly. You can then access them quickly from the Bookmarks box on the right of the screen.

There are two ways to bookmark Sections:

- Using the **Bookmark Section** option in the Section drop-down menu – the easiest, but you must be a **Moderator**!
- Using the **Bookmark** link (bottom right of the screen) – use this method if you are a **Contributor** as the other one won’t work!

#### Method 1: Using the Section drop-down menu (Moderator)

1. In the **Show site structure** screen, point the mouse cursor to the Section drop-down menu, then select **Bookmark Section** (Figure 62).

![Figure 62: bookmarking a Section using the Section drop-down menu](image)

That’s it!

#### Method 2: Using the Bookmark link at the bottom right of the screen (Contributor)

1. In the site structure, navigate to the Section you want to bookmark and click through it to display its **Content** tab.
2. Click on the **Bookmark** link in the bottom right corner of the screen (Figure 63).

---

**Try it**

Following the instructions above:

- make a few changes to a content block and compare the different versions using the 2 comparison modes.
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3. Replace the text in the Name field with the Section name and click OK (Figure 64).

4. Click on the Site Structure icon in the top menu. The Section is now listed in the Bookmarks box.

**To modify or delete a bookmark:**

1. In the Bookmarks box, click on Edit and then on the Delete icon to remove the bookmark or Modify to edit its name (Figure 65).

**Try it**

Using one of the methods above:

- Bookmark a Section and access it from the Bookmarks box.
6 Using Direct Edit to add and modify content

Objectives
In this task you will learn:

• to access the Direct Edit mode
• to add content in Direct Edit
• to modify and delete content in Direct Edit
• to view content history in Direct Edit
• to navigate the site structure in Direct Edit

Comments
Direct Edit mode is Site Manager’s highly visual way to edit your site’s content. The main benefit is that it can be accessed from a live web page without having to log in to the main Site Manager interface first. It is particularly useful for minor edits.

6.1 Accessing Direct Edit

You can access Direct Edit in one of two ways:

• using the Direct Edit option in the Section drop-down menu in the main interface;
• using the ‘Edit this page’ link on a live web page.

Warning
Direct Edit cannot be used with all pages. In particular news and events cannot be created or modified using Direct Edit, as well as pages containing tabs or collapsible content.

It works best on content pages with a simple layout (i.e. pages consisting of text in a single column with a few images).

Method 1: using the Direct Edit option in the Section drop-down menu

When logged into Site Manager’s main interface, as explained in Task 1, Getting to know Site Manager.

1. From the Show Site Structure screen (Hint: click on the Site Structure icon in the top menu or in the Content menu drop-down), navigate to the Section you want to add content to.

2. Point the mouse cursor to the yellow drop-down menu arrow opposite the relevant Section and select Direct Edit (Figure 66).
Method 2: using the ‘Edit this page’ link on a live web page

1. In a web browser, open your live website and navigate to the page you want to modify.

2. Look for the Edit this page link in the bottom right of the page, just above the footer, and click on it (Figure 67).

3. Click on Sign in with SSO and enter your UoB username and password.

6.2 The Direct Edit interface

Figure 68: Direct Edit interface as a Moderator
A. Direct Edit toolbar – Here you can:
   • add a new content block to the current Section (Add Content to Current Page button)
   • add a new Section (Add New Page button)
   • modify / delete a page (Modify and Delete buttons)
   • approve pending content (Approve button)
   • access the site structure (Site Structure button) to navigate to a different Section
   • hide or display the toolbar (click the up / down arrows in the top right)

B. Content area – Editable content blocks are identifiable by the thin dotted red line that delineates them. Hover the mouse cursor inside a content block to see the Modify, Delete, History and Approve options.

6.3 Adding content in Direct Edit

1. Click on the Add Content to Current Page button and, if prompted, select a Content Type (Figure 69).

   ![Figure 69: Adding content and selecting a Content Type](image)

2. In the Content tab, fill in the content details as you did in Task 2, Adding content to a Section (Figure 70).

   ![Figure 70: Filling in the Content details](image)
Optionally you may want to fill in the Options tab fields (Figure 71).

![Figure 71: Filling in the Options details](image)

3. Click **Save as Draft** if you need to make further edits before submitting or **Add** to submit the page for approval.

### 6.4 Modifying and deleting content in Direct Edit

Once a Section contains one content block, it can be edited straight away in Direct Edit mode.

Any content block for which you have editing right is surrounded by a red dotted line.

When you hover the mouse cursor towards the top of this area, it will change into an orange dotted line and 3 option tabs will appear in the top left: **Modify**, **Delete** and **History** (Figure 72).

![Figure 72: Content editing area in Direct Edit mode](image)

**To modify content:**

1. Click on the Modify tab. This takes you to the Modify content screen, which is identical to the one you use to add content (see Figure 70 and Figure 71).

2. Edit your content as desired and click **Save as Draft** if you need to make further edits before submitting or **Update** to submit the page for approval.
To delete content:

1. Click on the Delete tab.
2. A window will pop up, prompting you to confirm that you want the content to be deleted (Figure 73).

![Figure 73: Confirm content deletion window](image)

You will see a confirmation message appear at the top of the screen for a few seconds (Figure 74).

![Figure 74: Content deletion confirmation message](image)

Once deleted, the content will disappear from the page – although you will need to reload the page to see the change.

6.5 Viewing content history in Direct Edit

1. In the content editing area, click the History tab (Figure 72).

The View Content history window (Figure 75) shows all the versions listed.

![Figure 75: View Content history window](image)
It allows you to replace the current (Active) version with a previous one by clicking the Set Active link.

2. Click Cancel to leave the History view.

### 6.6 Navigating the site structure in Direct Edit

1. Clicking on the Site Structure button opens a pop up menu showing the site structure (Figure 76).

![Site Structure pop up menu](image)

Figure 76: Site Structure pop up menu

2. Navigate through the hierarchy to select the Section you want to add content to, or whose content you want to modify. Click on the and icons to expand / collapse Sections.

#### Adding a new Section/ Page in Direct Edit

Although it is possible to add a new Section / page in Direct Edit, it is recommended that you do not use this option and use the main interface as described in Section 2.1 instead.

#### Try it

Following the instructions above:

- Open one of the pages you created in Direct Edit
- Make some changes to it and save them.
7 Adding media to the Media Library

Objectives
In this task you will learn:

• to access the Media Library
• to add media files to the Media Library
• to delete media files from the Media Library
• to move media files to a different category
• to optimise images for the web using an online photo editor
• to manage sub-categories

Comments
If you want to use images in your site or share PDF or other documents types, you first need to upload them to the Media Library.

7.1 Introducing the Media Library

The Media Library is where media files are stored in Site Manager. Media files include images, PDF files, Microsoft Office files, style sheets and scripts, but not videos. Once in the Media Library files are easy to access from within Site Manager’s visual content editor, for example to create a link to a PDF file or insert an image in a web page.

The Media Library interface

Figure 77: The Media Library interface in Detailed (list) Mode

A. Resize categories view navigation menu – allows you to widen or narrow the categories navigation menu.

B. Add / Move / Delete Media buttons – use to upload a new media file, move a file to a different category or delete.

C. Search – allows you to search for items in the Media Library, by name, keywords or description.

D. Jump – allows you to search for media items by ID (if you happen to know it which is unlikely). Ignore.

E. Filter – allows you to filter which file types are displayed (e.g. Image, Adobe PDF Document, Script, etc).

F. Views – allow you to select how the media items are displayed. Click the icons to toggle between Detailed Mode and Preview Mode.
G. **Categories navigation menu** – displays the hierarchy of available categories.

H. **Media items** – this area displays the content of the chosen category, in Detailed Mode or in Preview Mode (see F).

### 7.2 Accessing your site’s Media Library

1. Go to **Content > Media Library** (Figure 78).

![Figure 78: Accessing the Media Library](image)

2. Expand the **sites** category on the left to find your site’s top level category and sub-categories.

![Figure 79: Finding your site’s top level category](image)

In addition to **sites**, you will see two other main categories maintained by the Digital Communications Team: **resources** and **shared**.

- **resources** contains template style sheets, scripts and images and can only be used by higher level users.
- although currently empty, with time **shared** will be populated with University copyrighted images that you could use in your website.
Warning

Before uploading files to the Media Library, **make sure that all file names are web-safe**, i.e.:
- all lower case (no capital letters);
- not containing spaces (use a hyphen to separate words);
- not containing special characters (e.g. accented characters);
- include the appropriate extension (e.g. .jpg; .pdf, etc).

Example: **Fire Safety Policy.pdf** ✗ fire-safety-policy.pdf ✓

Beware that non-web-safe file names may result in broken links in some browsers.

1. Select the sub-category to which you want to add a media file and click on the **Add Media** button (Figure 80).

15. In the **Media Library** screen, **General** tab, (Figure 81), fill in the **Name** and **Media** fields as follows:
   - **Name**: enter a brief description of the media (in the case of a PDF or Office file enter the document title).
   - **Media**: use this field to navigate to the media file location on your system.

Example:

![Fire Safety Policy.pdf](fire-safety-policy.pdf)
When uploading images, **DO NOT** enter anything in the **Description** field as this would be used by default as the image alternative text and may not be appropriate to the context in which the image is used, or reflect its function (e.g. if used as a link). It is better to enter a description when inserting the image in a page.

16. Click **Add** when done.

The media is now listed in the relevant category (Figure 82):

![Figure 82: Newly added media](image)

### 7.4 Working with images on the web

Before using an image on a website, it is good practice to optimise it for the web. This means re-sizing it to the pixel dimensions (i.e. width and height) you want it to take up on the page and reducing its file size, and ensuring that it is in a suitable format.

**What is a good image size?**

A good size for an image depends on how you are planning to use it, but as a rule of thumb, 955 pixels is the maximum width needed on the University website (for a full page width banner for example).

In the case of images used to illustrate a standard page and positioned to the right with the text on the left, **you should use the recommended width of 283 pixels** to ensure the image fits properly within the page layout.

However there may be occasions (e.g. when it contains a lot of small details or textual information) when the image needs to be wider than 283 pixels.

Note that the height is not so important, so you should always decide on the width first.

**What tools to use for resizing and cropping images?**

The quickest is to use a free online tool like Web Photo Resizer ([http://www.webresizer.com](http://www.webresizer.com)) or Pixlr ([http://pixlr.com](http://pixlr.com)):

- **Web Photo Resizer** is very easy to use: click on the **Resize Photos Now** button, upload your image, set the width (leaving all other options as they are), click the **apply changes** button and download the resized image.

- **Pixlr** is a full blown image editor with Photoshop like capabilities. Choose the advanced option (**Pixlr editor**) and select **Open image from computer** to upload an image. Then go to **Image > Image size and**
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enter the width you want (the height will automatically adjust provided Constrain proportions is selected). Click OK. Go to File > Save (choose a suitable file format – see below).

Alternatively use Serif PhotoPlus which should be pre-installed on your University computer (go to Start > All Programs > Serif Applications) or any other photo editor you may have access to (e.g. Photoshop CS / Elements, Google Picasa, etc).

Which file format?

There are three file formats for the web:

• **JPG** (or **JPEG**): best for photos and images with lots of colours but no transparency. You can set the level of quality between 10% and 100% - don’t go for 100% for web images, instead choose 80% which is still high, but will reduce the file size considerably.

• **GIF**: for a long time the default format for logos and graphics with solid areas of colour. However it can only display a maximum of 256 colours and for this reason it is not suitable for photos.

• **PNG**: seen as a replacement for GIF, over which it has many advantages: not limited to 256 colours; better transparency support (useful for creating images with transparent backgrounds); smaller file size (a PNG image is about 20% smaller than the same images saved as GIF). You should use this format instead of GIF whenever possible.

Try it

Following the instructions above:

1. **Optimise an image using Web Photo Resizer:**
   - Open [webresizer.com](http://webresizer.com) in a browser.
   - Click on the **Resize Photos Now** button and upload an image (use images located in **Favorites > Public > Public Pictures > Sample Pictures**) – note that the maximum size allowed is 10MB.
   - Set the width size to **283px**, leave the Sharpen and Image quality options as they are.
   - Click on the apply changes button followed by the download this image link and save the optimised image locally (e.g. in **Favorites > Downloads**) – at this stage don’t forget to rename the file to a web-safe name (see note on previous page).
   - If you have time you can also try the crop option with another image and save it in the same folder.

2. **Upload your image to the Media Library:**
   - Upload the image you have just optimised to the **Training > images** category.
   - Optionally, add a PDF file to the **Training > documents** category.
7.5 Deleting media from the Media Library

To delete individual media

In the View Media in Detailed mode:
Click on the Delete icon opposite the media you want to delete (Figure 83) and confirm when prompted:

![Figure 83: Deleting in the View Media in Detailed Mode](image)

In the View Media in Preview mode:

1. Hover the mouse cursor over the media you want to delete and click on the Advanced button (Figure 84).

![Figure 84: Deleting in the View Media in Preview Mode](image)

This opens the media details view (Figure 85).

![Figure 85: Media details view, Delete](image)

2. Click **Delete** and confirm when prompted.
To delete several media files at once

In the View Media in Detailed mode view:

1. Select the file(s) you want to delete in the Select All column on the left.
2. Press the Delete Media button.

![Image of deleting files](image.png)

Figure 86: Deleting several files at once

Notice that if the media file you try to delete is used on a page you will receive a warning like the one below:

![Warning image](image.png)

In this case Cancel, as this would result in a broken link on those pages that have a link to it.

7.6 Assigning media to other categories

By default, media item are assigned to the category in which they are added. However it is possible to move a media file to a different category or assign a media item to several categories.

The latter is particularly useful when you want a media file to appear under different categories without duplicating it. For example if you have a photograph of a person in a particular location, you may want it to appear under a sub-category named people and another named places.

To move a file to a different category

In the View Media in Detailed mode view:

1. Select the file(s) you want to move in the Select All column on the left.
2. Press the Move Media button.
3. In the pop-up box, select the new category and press **Move Media** (Figure 88).

![Figure 88: Selecting a new category for the file(s)](image)

**To assign a media file to several categories**

**In the View Media in Detailed mode:**

1. Click either on the **Media Name** (and then the **Modify** button on the next screen), or on the **Modify** icon opposite the media you want to modify (Figure 89).

![Figure 89: Modifying in the View Media in Detailed Mode](image)

2. Select the **Categories** tab (Figure 90).
3. Once in the **Media Categories** screen, select or de-select the categories you want to add or remove the media in / from (Figure 91) and click **Update**.

![Media Categories Screen](image)

**Figure 91:** Selecting / de-selecting categories

In the View Media in Preview mode:

1. Hover the mouse cursor over the media you want to delete and click on the **Advanced** button (see Figure 84 above).

2. In the media details view, click **Modify** (Figure 92).

![Media Details View](image)

**Figure 92:** Media details view, Modify

3. Follow steps 2 to 3 above.

### 7.7 Managing sub-categories

**To add a sub-category**

1. Go to **Content > Media Library** (Figure 93):

![Content > Media Library](image)

**Figure 93:** Content > Media Library
2. Expand the category structure if necessary by clicking on the sign next to the category you want to expand.

Now do one of two things:

- Click on the parent category (i.e. the category in which you want to add a new category – a pale yellow background highlights it). Hover over **Options** and select **Add Category** (Figure 94):

![Figure 94: Adding a category using the Options menu](image)

- Right-click on the relevant parent category and select **Add Sub-Category** (Figure 95):

![Figure 95: Adding a sub-category](image)
Whichever method you choose, an input dialogue box pops up, prompting you to enter a name for the new category (Figure 96):

![Figure 96: new category name input prompt](image)

3. Type in a name for the new category and click **OK**.
The new category now appears in the Media Library structure, within the selected parent category.

**To delete a sub-category**

1. Do one of the following:
   a) Click on sub-category you want to delete to select it. Hover over **Options** and select **Delete Category** (see Figure 94 above).
   b) Right-click on the sub-category you want to delete and select **Delete** (see Figure 95).
2. Click **OK** to confirm.
The category and all its content are removed from the Media Library to the **Recycle** area, where they will be deleted forever at the next purge.

**To rename a sub-category**

1. Right-click on the sub-category you want to rename and select **Rename** (see Figure 95).
2. Type in a new name for the new category in the pop-up input dialogue box (see Figure 96 above) and click **OK**.

**To move a sub-category**

1. Right-click on the sub-category you want to rename and select **Move** (see Figure 95).
   A new window opens, showing the Media Library Site Structure.
2. Click on the new category you want to move it in.

**Try it**

Following the instructions above, create a sub-category in the Media Library:

- Open the **Media Library** and in the **Training > images** category, create a sub-category using your training site name (e.g. John Smith – it’s ok to use uppercase and spaces) as its name.
- Try to move the file(s) you uploaded earlier to it.
8

Editing and formatting text in TinyMCE

Objectives

In this task you will learn:

- to use basic text formatting (e.g. headings, lists, etc) correctly
- to create links (to other websites, to Sections in your website and to bookmarks within a page)
- to create links to non-HTML files (e.g. PDFs) stored in the Media Library
- to create data tables
- to add and position images from the Media Library

Comments

This final task focuses on editing the content of pages using TinyMCE, a simple WYSIWYG content editor. Whatever editing method you use (standard or Direct Edit) you will use TinyMCE.

8.1 Before you start

The content editor toolbar

The content editor toolbar (Figure 97) will be familiar as it uses similar icons to those seen in other word processing applications such as Microsoft Word; for example icons for making text bold, creating bullet lists, etc.

However some icons will be new as they are specific to web content editing within Site Manager.

![TinyMCE content editor toolbar](image)

Figure 97: TinyMCE content editor toolbar

The faded out tools are inactive until needed (e.g. the table formatting options at the bottom become active when a table has been created and is selected).

For a full list of tools available in TinyMCE, please refer to Appendix A.

---

1 What You See Is What You Get
Copying and pasting content from other sources

The cut, copy and paste options currently only work in Internet Explorer, so if you use Google Chrome or Firefox, you will need to use the keyboard shortcuts (i.e. `<Ctrl> + X` for cut, `<Ctrl> + C` for copy and `<Ctrl> + V` for paste).

Copying and pasting from a Microsoft Word, a PDF document, Google Mail or a web page:

We recommend that you always use the paste as plain text option. This avoids any chance of copying any unwanted formatting or styling into the webpage that you are creating.

Before pasting, click on the **Paste as Plain Text** icon and THEN the **Paste** icon (or `<Ctrl> + V`).

You may still need to reformat your content in TinyMCE afterwards.

Working in full screen mode

For longer edit and when working in **Direct Edit** mode you may want to switch the editor to full screen.

To do this, click on the **Toggle fullscreen mode** icon (Figure 98). Click on it again to go back to Site Manager or **Direct Edit** view.

![Figure 98: Switching to full screen mode for easier editing](image)

BEWARE the back button in your browser as using it to exit the fullscreen mode will result in losing all your changes!

For the same reason make sure you do not close the browser tab or window by mistake.

The context menu

The context menu can be accessed by **right-clicking** on any element (word, paragraph, image, table cell, etc) on the page.

The tools available in the context menu depend on the actions that are possible with the currently selected element in the WYSIWYG view of the editor.
For example right-clicking on a group of selected words will give you the options to cut, copy and paste, and to insert a link (Figure 99).

Figure 99: Accessing the context menu

### 8.2 Structuring text: paragraphs, headings and lists

#### Paragraphs and headings

When you start typing the text will be automatically formatted as a paragraph:

- Pressing `<ENTER>` will create a new paragraph.
- Pressing `<SHIFT>` + `<ENTER>` will create a line break.

To create a heading, place the mouse cursor anywhere in the text you want to turn into a heading (there is no need to select it all) and select one of the options from the **Format** drop-down box in the **Toolbar** (Figure 100).

Figure 100: Creating a level 2 heading

Heading formatting options starts from **Heading 2** because **Heading 1** is reserved for the page title and is automatically created by the system when using a **Content Type** with a **Title** field.

**Rules for using headings:**

1. Use the different heading levels in their intended, logical order (i.e. start from Heading 2 to introduce the main Sections in your page, followed by Heading 3 for sub-Sections and, if necessary Heading 4 for sub-sub-Sections).

2. Finally, use headings for their intended purpose (i.e. as Section headings); do not use them for anything else (e.g. for making text bold or for image captions).
Lists

Lists come in two types: unordered (ie bullet) and ordered (ie numbered). To insert a list:

1. Type the list items one by one as separate paragraphs (press <ENTER> at the end of each item).
2. Select all items with the mouse and click either of the list icons: [unordered] for an unordered list and [ordered] for an ordered list.
3. To take a list item out of a list, click the same list icon (it is highlighted) again – the item is automatically formatted as a paragraph.

Try it

Following the instructions above:

1. Copy and paste content:
   - Open a familiar web page (e.g. http://www.bristol.ac.uk/university/history/), select a few paragraphs of text and copy it (CTRL + C).
   - Modify one of the content blocks you created earlier and paste the text (CTRL + V).
2. Add formatting to the text:
   - Add a couple of sub-headings and format them accordingly.
   - Add a list of 3 or 4 items.
   - Save your changes.

8.3 Creating links

There are three ways to create links in Site Manager, depending on the target of the link:

- an external web page
- an email address
- another page in your site
- a PDF or Microsoft Office file.

Linking to external websites

1. Select the text you want to make a link then click on the Insert/edit link icon in the toolbar. This opens the Insert/Edit Link dialogue box (Figure 101).
2. In the Link URL field, type in (or paste) the external website URL (e.g. http://www.bbc.co.uk/news for a link to the BBC News website) – if you forget to include the http:// prefix a message will pop up asking if you want it added; click OK to accept.
   - **Target** attribute: leave the default option *Open in This Window/Frame* – exceptionally you may change it to *Open in New Window (_blank)*.
   - **Title** attribute: use this to provide additional text to describe the link or add useful information about the link. For example if you forced a link to open in a new window you could use the **Title** attribute to warn users by saying *link opens in new window*.
   - Ignore the **Class** attribute and the other tabs.

3. Click the **Insert** button.

**Linking to another Section or content block in Site Manager**

1. Select the text you want to make a link then click on the **Insert Section Link** icon in the toolbar. This opens the **Choose a Section to link** dialogue box (Figure 102).

   ![Choose a Section to link dialogue box](image)

   **Figure 102:** Choose a Section to link dialogue box

2. Using the **Site Structure**, navigate to the **Section** you want to link to.
Linking to a non-web document (i.e. an Office or PDF file)

1. Place the mouse cursor where you want to insert your link and click on the Insert Media icon.
   
   This opens the **Media Library** browser (Figure 103).

   ![Media Library browser](image)

   **Figure 103**: Media Library browser

2. In the **Media Library** browser, navigate to the folder containing the file you want to link to and click on its name in the **Media Name** column.

   The file **Media Name** as well as the file type and size in brackets will be automatically used as the link text.

Linking to an email address (mailto link)

1. Select the text you want to link to an email address and click on the **Insert/Edit link** button.

2. In the **Link URL** field type in (or paste) the email address (e.g. `joe.blog@bristol.ac.uk`) and click **Insert**.

3. Click **OK** when prompted to add the required mailto: prefix.

   The mailto link text should clearly indicate that the link will activate an email program. This can be achieved by either using the email address as the link (e.g. `joe.blog@bristol.ac.uk`) or a phrase like **Email the School of Humanities office**.

   ![To note]

   The Site Structure shows the entire University website starting from the University homepage. Therefore you can use this method to link to any website hosted in T4 Site Manager.

   For other University websites not in Site Manager you will need to use the method for linking to external websites.

   ![Warning]

   If you copy a linked email address from a web page (e.g. from the University Contact Directory), make sure you click on the **Paste as Plain Text** button before pasting. This is particularly important if you use Google Chrome as it will force the mail to link to open Google Mail.
Try it

Following the instructions above:

1. **Create external links**
   - Modify again a content block you created earlier and in the **body text** field create links to a couple of your favourite websites.

2. **Create internal links**
   - Create a link to a page within your training site (make sure you select from the training channel `wwwtrain.bristol.ac.uk`).

3. **Create a link to a non-web document**
   - Create a link to the PDF document in the **Media Library training > documents** category.

4. **Create a link to an email address**
   - Create a link to your own email address.

### 8.4 Adding and positioning images

**Selecting an image from the Media Library:**

1. Place the mouse cursor where you want to insert your image (this should be either between two paragraphs or at the beginning of a paragraph when you want to “float” the image to the right – see **Right aligning the image** on p.55) and click on the **Insert Media** icon to open the **Media Library** browser.

If the **Media Library** browser opens in **View Media in Detailed Mode** (i.e. as a list as shown in Figure 103 above), switch to **View Media in Preview Mode** (i.e. with thumbnails) as in

2. In the **Media Library** browser, find the image you want to insert and select it by hovering over the image and clicking **Select** (Figure 104).
Modifying the image attributes:

1. Left-click on the image to select it and then right-click to open the context menu, select **Edit Media Attributes** (Figure 105).

This opens the **Set Media Attribute** dialogue box (Figure 106):

- **Description**: Use this option to provide alternative text for the image if needed.
- **Class**: This is where you specify styling to position the image.
Specifying a description (alternative text)

Providing Alt text for non-text elements on a web page is a fundamental principle of web accessibility.

Although this is primarily intended for the benefit of text-to-speech software users (i.e. blind people), other users may benefit too (e.g. those using a text-only browser).

2. If relevant (see Top tip below), in the description field enter a short description of the image.

To write a good image description (Alt text), ask yourself:

1. Is the image used as a link?
   Yes: use the description field to describe the image AND use the title attribute to indicate what happens when the image is clicked (e.g. Opens the Wikipedia entry for…)
   No: continue

2. Does the image convey important information?
   Yes:
   • if a simple graphic or photograph, use the description field to provide a brief factual description of the image;
   • if the image contains text, use the description field to provide the exact same text;
   • if a complex image (e.g. graph, pie chart), use the description field to provide a short description AND provide the information contained in the image as text on the page.
   No: the image is purely decorative (i.e. does not contain useful information), you can leave the description field empty.

For further information, see: webaim.org/techniques/alttext/

Right aligning the image:
You can easily align an image to the right of your page with the text on the left by applying a style class (note that there is no equivalent class to align images to the left).

For this to work, place the cursor at the beginning of the paragraph with which you want to align the image and open the Set Media Attributes dialogue box as explained in 1 above.

3. In the class field, enter one of the following style classes:
   a. align-right when the image is the standard width (283 pixels);
   b. align-right-no-width when the image width is different from 283 pixels.

4. Click Update and Update again (or Save as Draft) when back in the Content tab view.
   Preview the page if you want to see your changes.
Try it

Following the instructions above:

- Insert the image you uploaded to the Media Library earlier in one of your pages.
- Apply the relevant class to position it to the right.
- Update and preview your changes.

8.5 Creating data tables

Data tables should be used to present lists of at least two related items with two or more categories of information (i.e. at least two rows and two columns), and to compare numerical data.

Basic table creation

1. Place the mouse cursor where you want to insert a data table and click on the **Insert a new table** icon. This opens the **Insert/Edit Table** dialogue box and shows the **General** settings (Figure 107):

   Set the options for your table using the **General** settings as follows:

   - **Cols / Rows**: sets the number of columns and rows including header rows/columns.
   - **Cell Padding**: adds space between the edges of cells and the text; set it to 4 or 5 pixels.
   - **Cell Spacing**: adds space between cells; best left to 0.
   - **Alignment**: sets the horizontal alignment: Left (default), Center and Right; best left to default as this can be set in a style sheet.
   - **Width / Height**: leave blank as this is best left to adjust automatically to fit the text.
   - **Class**: can be used to link to a style sheet.
   - **Table Caption**: tick this box (you will then need to type a caption above your table).
   - **Make first row / column a header**: defines header rows / columns; your table should have a header row, so tick this box, and optionally the header column option.
Figure 107: Insert/Edit Table General options

2. Click **Insert**.
   
   You will now see the outline of an empty table (Figure 108)

Figure 108: outline of a 4 row, 4 column table with caption at the top.

3. Enter a caption at the top, then the column headers in the first row (optionally the row headers in the first column headers) and the data in the other cells.

**Making tables accessible**

Data tables can be difficult (if not impossible) to interpret for text-to-speech software users (e.g. blind users), particularly when used to compare numbers.

It is therefore an accessibility requirement to ensure that information presented in a data table can be understood by the visually impaired.

See [accessibility.psu.edu/tableshtml](http://accessibility.psu.edu/tableshtml) for further information on data table accessibility.
Adding a table summary
1. Left-click anywhere in the table and then right-click. In the pop-up context menu select Table Properties.
2. In the Insert/Edit Table dialogue box, select the Advanced tab (Figure 109).

![Figure 109: Insert/Edit Table Advanced options](image)

3. In the Summary field enter a brief description of the table (e.g. *Table representing the percentages of UK adults who drink wine by age group*). Leave all other fields empty (in particular do not use the Border Color and Background Color as this is better done in a style sheet).
4. Click Update when done.

Defining the header row and column
1. Left-click anywhere on the header row (i.e. the top row) and then right-click. Select Cell > Table Cell Properties (Figure 110).

![Figure 110: Selecting the Table Cell Properties](image)

2. In the Table Cell Properties dialogue box (Figure 111):
   - check that the Cell Type is set to Header;
   - set the Scope option to Column;
   - select Update All Cells in Row from the drop-down just above the Update button;
T4 Site Manager for pre-responsive templates

- click **Update** when done.

![Table Cell Properties dialogue box](image)

Figure 111: Table Cell Properties dialogue box

If the table has a header column on the left, repeat these steps, setting the **Scope** to **Row** and the drop-down field above the **Update** button to **Update All Cells in Column**.

**Defining table head and body**

1. Finally, left-click on the header row again, then right-click and select **Cell > Table Row Properties**.
   
   In the **Table Row Properties** dialogue box (Figure 112):
   
   - set the **Row Type** to **Header**;
   - check that the drop-down option above the **Update** button is set to **Update Current Row**;
   - click **Update**.

![Table Row Properties dialogue box](image)

Figure 112: Table Row Properties dialogue box

**Applying basic styling**

1. Left-click anywhere in the table and then right-click. In the pop-up context menu select **Table Properties**.
2. In the **Class** attribute, select *(value)* from the drop-down and type **table-basic** in the now blank field (Figure 113).

![Insert/Edit Table dialog box](image)

Figure 113: Adding basic styling to a table

---

**The CSS class table-basic** is part of the UoB template stylesheet and defines default styling for data tables.

---

**Try it**

Following the instructions above:

- Create a simple data table with a header row and a header column using your own or the following data:

```
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Red Bordeaux</td>
<td>8</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>8</td>
</tr>
<tr>
<td>White Bordeaux</td>
<td>7</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Red Burgundy</td>
<td>9</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>White Burgundy</td>
<td>8</td>
<td>8</td>
<td>9</td>
<td>8</td>
<td>7</td>
</tr>
</tbody>
</table>
```

**Caption**: French Vintages 2008-2012

**Summary**: French vintages score out of 10 from 2008 to 2012

- Make sure the table is fully accessible.
- Update and preview.
9 Publishing content

Objectives
In this task you will learn to:

• approve content
• reject content

Comments
As a Moderator you may have to approve new or modified content submitted by Contributors in your team. Once approved, a content block will be published to the live site at the next publish cycle (normally every 2 hours on even hours).

There are two ways publish content in Site Manager:

• using the Approval List in the main interface;
• using Direct Edit.

9.1 Using the Approval List to approve/reject content

When in the Show site structure screen look for the Approval List on the right (Figure 114).

![Show site structure](image)

This list shows the 10 most recent content blocks that are pending.

If you see the item you want to approve in the list:

1. Click on its name in the list.

This opens the Approve Content screen > Details tab (Figure 115).
2. To preview the content, click on the relevant channel name (Production for the live University website) under Published Channels. This opens a preview of the page in a new tab or window.

3. After previewing the page click Approve. You can also edit the content yourself by clicking on Edit (this opens in a new tab) and making your changes as desired before selecting Update & Approve from the Update drop-down.

If you don’t see the item you want to approve (or want to see a full list of pending items):

1. Click on View All at the bottom of the Approval List or point to the Content menu and select Approve Content. This takes you to the Approve Content screen which lists all Pending content (Figure 116).

2. Click on the name of the pending content you want to approve and follow steps 2 and 3 above. You can also approve several items at once by selecting the corresponding check boxes on the right (or if you want to select them all using the Select All option at the bottom of the screen, then click Approve.)
However this option should be used with caution as approving content without checking it first can be risky!

**Rejecting content**

If you need to reject content:

1. When in the **Approve Content** screen > Details tab (see Error! Reference source not found. above), click on Reject.
   
   This opens the **Approve Content** screen > Details tab form for rejected content (Figure 117).

   ![Figure 117: rejected content form](image)

2. Enter the reason why you are rejecting the content in the **Reject Reason** box.

3. Click **Submit**.

   By default the last person to have modified the content block will be notified by email.

**Try it**

Following the instructions above, approve pending content blocks on your site:

- Look in your **Approval List** (or use the **Content** menu > **Approve Content** option) for pending content.
- Approve 2 or 3 items, previewing and/or editing them first if you want.

**9.2 Using Direct Edit to approve/reject content**

One of the problems with the approval process presented in Section 9.1 is that it can sometimes be difficult to identify which content is your responsibility in the approval list.

This is particularly true in the case of large sites with many Contributors and Moderators.

To get around this problem use the Direct Edit method as follows:
1. Ask the Contributors in your team to send you an email including the URL of the live page that they have modified (and possibly details of the changes they have made).

2. Open the page in a browser and click on the **Edit this page** link in the bottom right.

3. Log in to access the page in **Direct Edit** mode, then check the changes. Point the mouse cursor inside the editable area until you see the **Modify**, **Delete**, **History** and **Approve** options.

4. In the **Approve** drop-down select **Approve** (Figure 118) and then again **Approve** when prompted.

   If you select **Reject** you will be prompted to enter the reason for rejecting.

---

**Figure 118: Approve options in Direct Edit**

---

**To note**

You can also access the entire approval list by clicking **Approve** in the Direct Edit toolbar.
Managing the left navigation menu

Objectives

In this task you will learn to:

• show / hide a Section from the left navigation menu
• reorder links in the left navigation menu

Comments

The main navigation menu for your website is located on the left-hand side of the page, and is automatically generated from the site structure.

10.1 Overview

There are different navigation menus available to visitors on the University website (Figure 119).

• **Global navigation**: this is the main University level navigation, which is part of the template and is showed on all pages.

• **Breadcrumb trail**: this reflects the site’s structure starting from the University homepage and is automatically created.

• **Left navigation menu**: automatically generated from the site’s structure, but can be edited (i.e. you can hide Sections from it, add links manually and reorder links). Links expand to show links to sub-Sections down to 3 levels.

• **In page navigation**: this is optional and is added manually within a content block.

![Image](image_url)

Figure 119: Navigation menus on a typical University website

There is also a ‘fat’ footer navigation menu containing global University links as well as an a-z index (Figure 120)
10.2 Showing / hiding a Section from the left navigation menu

As mentioned before (see p.14, Entering Section details), when you add a new Section (or update an existing one) there is an option to show or hide it from the left navigation menu.

By default, this option is checked (meaning a link will be created in the left navigation menu).

To hide a Section from the left navigation menu

1. Go to the Add / Modify Section screen General tab and look for the Show in navigation? option (Figure 121).

2. Deselect the Show in navigation? option check box.
3. Click Add / Update.

When hidden, the Section will appear as greyed out in the site structure.
10.3 Reordering navigation links

By default, the left navigation menu links are ordered in the order in which Sections are created. So every time you add a new Section, a link to it will be added below all preceding links.

To re-order the left navigation links

1. Starting from the Show Site Structure screen, expand the site structure and navigate to the Section whose links you want to re-order.
2. Once in the Modify Section, Show Details screen, select the SubSections tab on the right (Figure 122).

![Figure 122: Section SubSections tab view](image)

The sub-Sections are listed at the bottom, under the Name column.
3. Use the up and down arrows on the right to re-order the sub-Sections (Figure 123).

![Figure 123: re-ordering Section links using the Move up/down arrows](image)

4. Click Save Changes.

Try it

Following the instructions above:

- Go to your own top level Section and in the SubSections tab, re-order the sub-Sections you created earlier.
- Save and preview your changes.
## Appendix A

<table>
<thead>
<tr>
<th>B</th>
<th>Make selected text Bold</th>
<th>Insert a horizontal ruler</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Make selected text Italic</td>
<td>Make selected text Subscript</td>
</tr>
<tr>
<td>Format ▼</td>
<td>Text formatting styles (e.g. paragraph, heading 2)</td>
<td>Make selected text Superscript</td>
</tr>
<tr>
<td>Cut *</td>
<td>Insert custom character (e.g. accented characters)</td>
<td></td>
</tr>
<tr>
<td>Copy *</td>
<td>Toggle full screen mode</td>
<td></td>
</tr>
<tr>
<td>Paste *</td>
<td>Edit HTML source</td>
<td></td>
</tr>
<tr>
<td>Paste as plain text</td>
<td>Insert link to a Section within SM</td>
<td></td>
</tr>
<tr>
<td>Paste from Word (DO NOT USE THIS WHEN PASTING FROM WORD)</td>
<td>Insert link to a specific content block within SM</td>
<td></td>
</tr>
<tr>
<td>Select all</td>
<td>Insert a link to a media item (e.g. image, PDF) in the SM Media Library</td>
<td></td>
</tr>
<tr>
<td>Insert / edit hypertext link to an external web page</td>
<td>Run the spell checker</td>
<td></td>
</tr>
<tr>
<td>Unlink (remove link)</td>
<td>Insert a new data table</td>
<td></td>
</tr>
<tr>
<td>Find</td>
<td>Edit table row properties</td>
<td></td>
</tr>
<tr>
<td>Find and replace</td>
<td>Edit table cell properties</td>
<td></td>
</tr>
<tr>
<td>Format selected paragraphs as unordered (bullet) list</td>
<td>Insert new table row above / below</td>
<td></td>
</tr>
<tr>
<td>Format selected paragraphs as ordered (numbered) list</td>
<td>Delete table row</td>
<td></td>
</tr>
<tr>
<td>Outdent / Indent (use the latter to create sub-lists)</td>
<td>Insert new column before / after</td>
<td></td>
</tr>
<tr>
<td>Format paragraph as blockquote</td>
<td>Delete column</td>
<td></td>
</tr>
<tr>
<td>Undo / Redo previous actions</td>
<td>Split merged table cells</td>
<td></td>
</tr>
<tr>
<td>Format selected text as a Citation</td>
<td>Merge selected table cells</td>
<td></td>
</tr>
<tr>
<td>Format selected text as an Abbreviation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>