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).

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.

I want to…

…update an existing page	☐ 4 Modifying content
	☐ 8 Editing and formatting text in TinyMCE
…create a new page	☐ 2.1 Adding a new Section
	☐ 3 Adding content to a Section
	☐ 8 Editing and formatting text in TinyMCE
…create a link to a PDF file	☐ 7 Adding media to the Media Library
	☐ 8.3 Creating links

Contents

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**.

To note

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/.

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 Chrom**e on University-owned PCs.

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

Figure 1: Site Manager UoB login screen

2. To access a University website click on **Sign in with SSO** button in the **Single Sign-On** option at the top, and enter your UoB username and password when prompted

Context

When using this document for self-study, log in to the training environment using the username and password provided by the central Digital Communications Team.

If you don't have these details, email web-editor@bristol.ac.uk to request them.

> Make a note of the training site and login details provided by the tutor:
>
> Username : _____
>
> Password : _____

1. Open **t4cms.bris.ac.uk** in a browser.
2. Enter the above details in the **Non-University of Bristol sign-on** box and click on the **Login** button.

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

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.
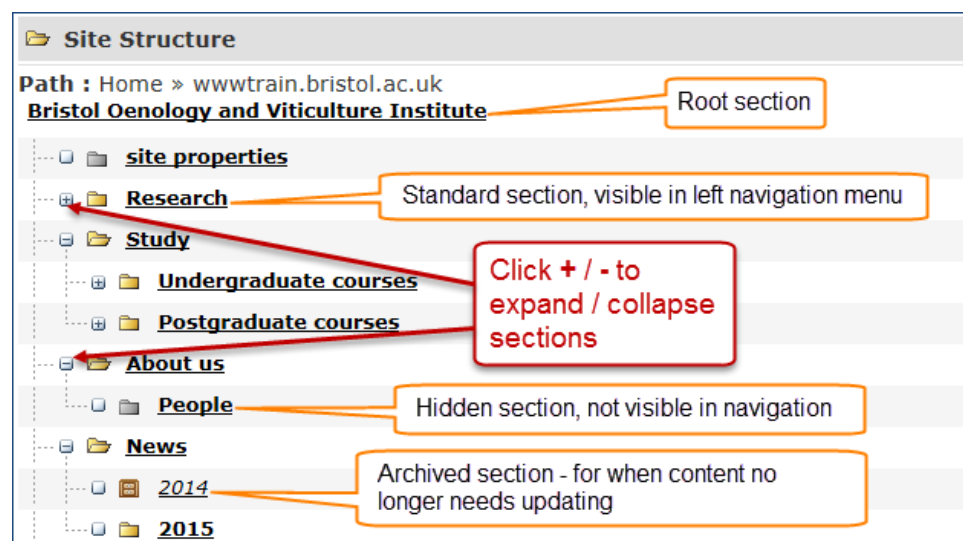
Figure 3: Sample website structure in Site Manager.

To note

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).
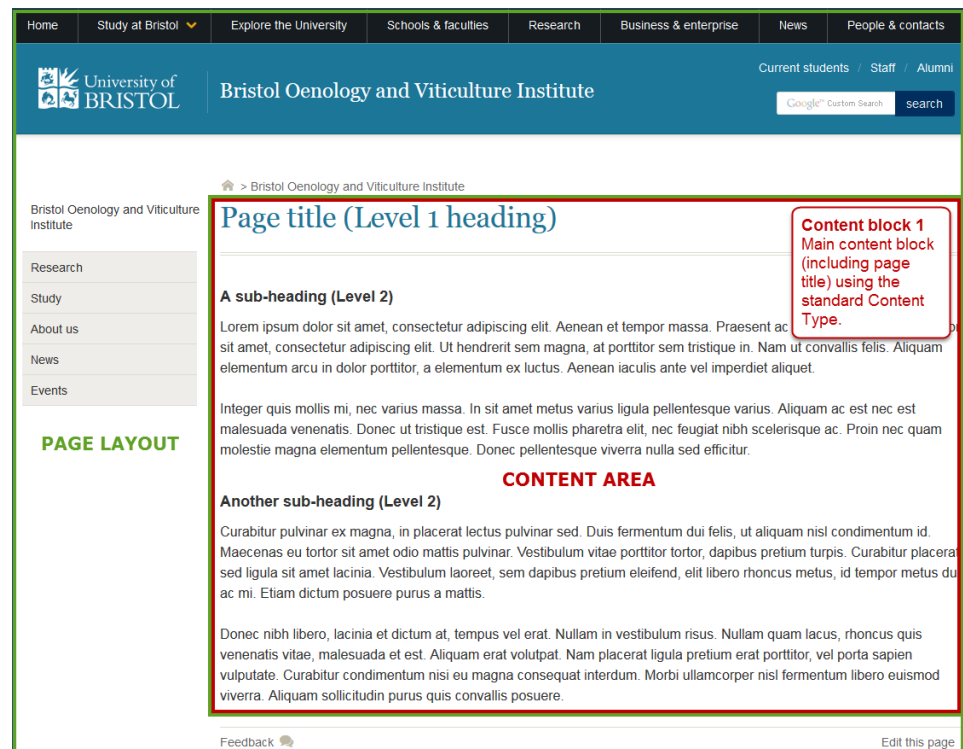
Figure 4 – Sample page built using a single content block
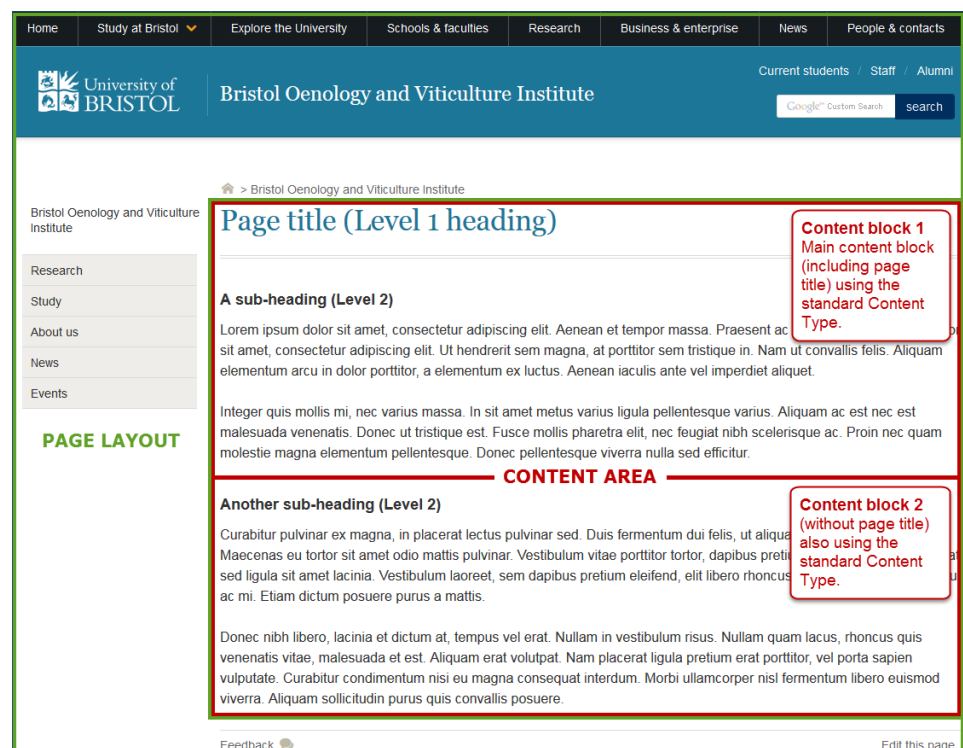
Figure 5 – The same sample page built using two content blocks

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.

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**).
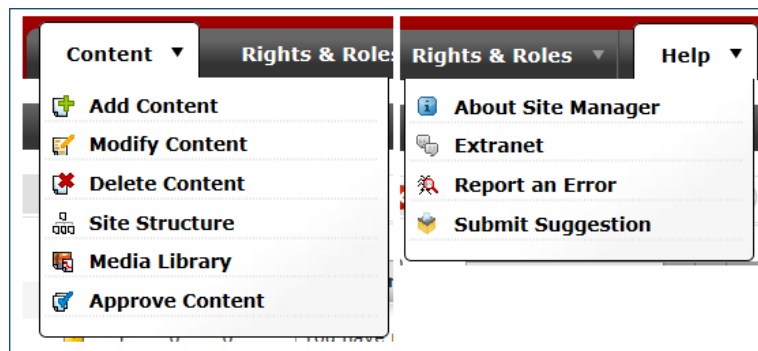
Figure 7: Content and Help menus options

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.
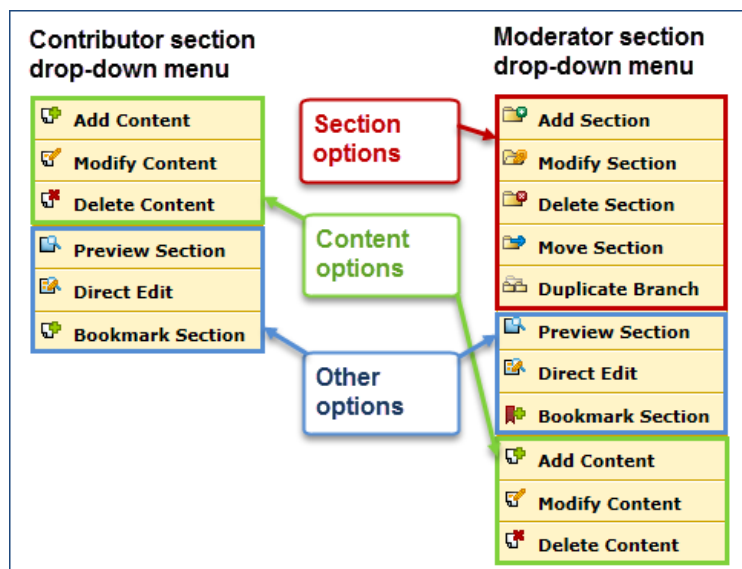
Figure 8: Contributor and Moderator Section drop-down menus

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.

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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.

2

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).
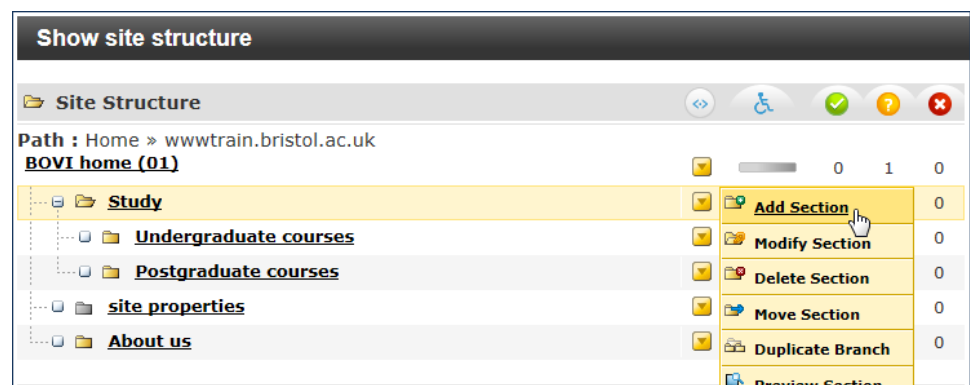
Figure 10: Adding a Section using the drop-down menu

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).
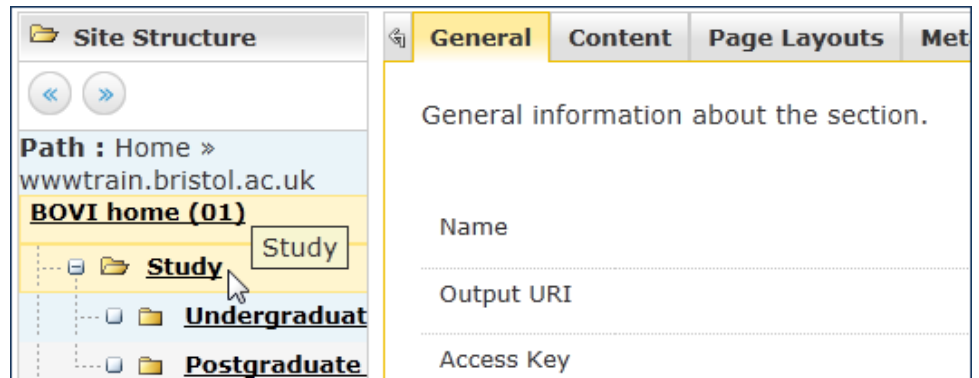

Figure 11: Navigating to the Section you want to add a subSection to

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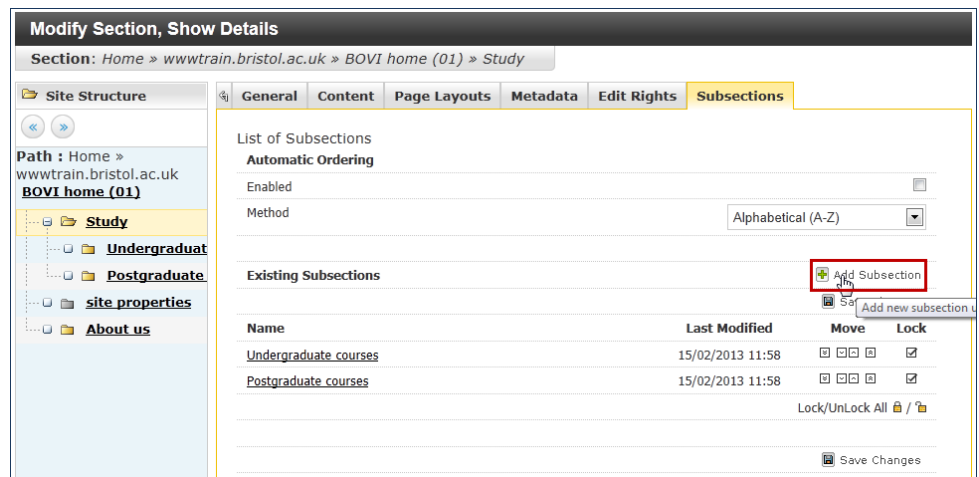

Figure 12: Section SubSections tab screen

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.

Figure 13: Entering Section details

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).
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:

if the Name is:	the Output URI could be:
Short courses	short-courses
Research themes	themes

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

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engine results pages (SERPs). Every page should have it's 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.

Activity

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).
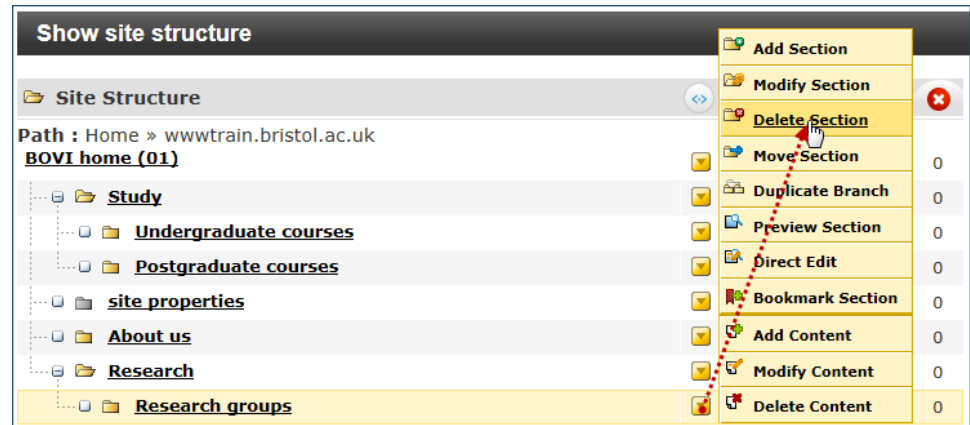

Figure 14: Deleting a Section

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).
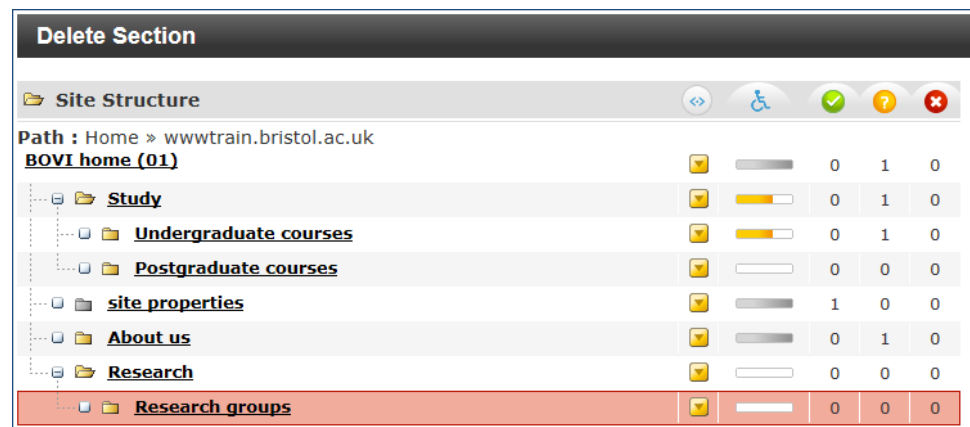
Figure 15: Deleted Section in the Site Structure

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

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):
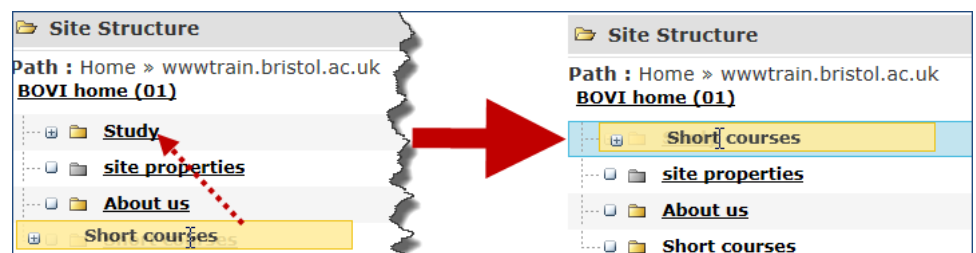

Figure 17: Moving a Section using "drag and drop"

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):
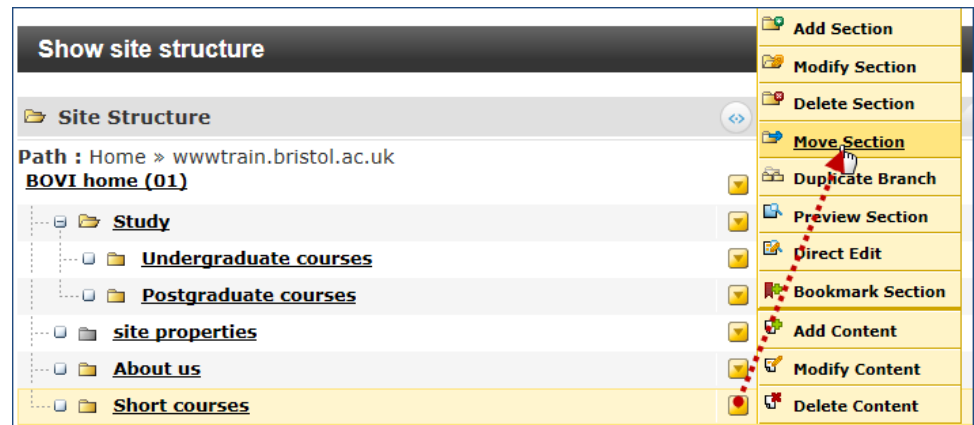

Figure 18: Moving a Section using the drop-down arrow menu

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.

To note

> 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):

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Figure 19: Duplicate Branch options screen

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.

Activity

Try it:

Following the instructions above:

➢ Try to delete, move and duplicate a Section.

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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).
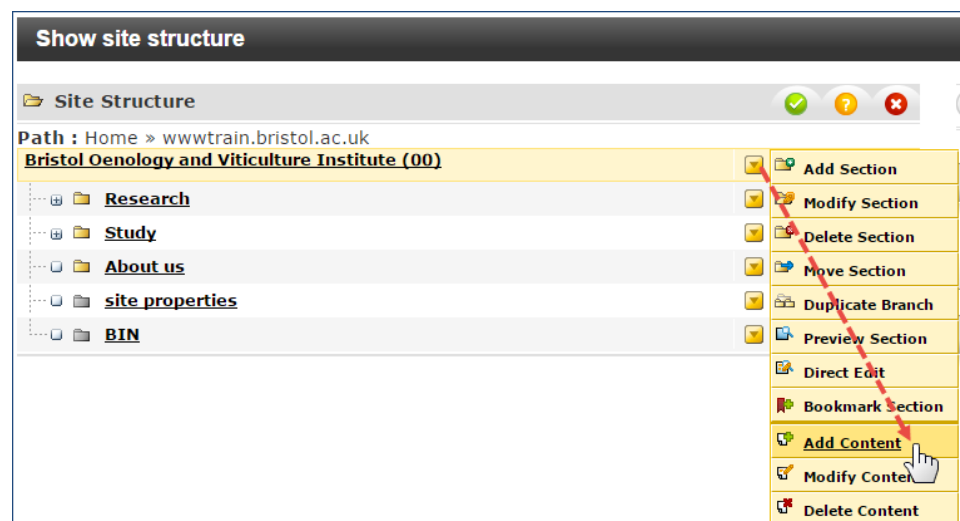
Figure 20: Adding content using the Section drop-down menu

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).
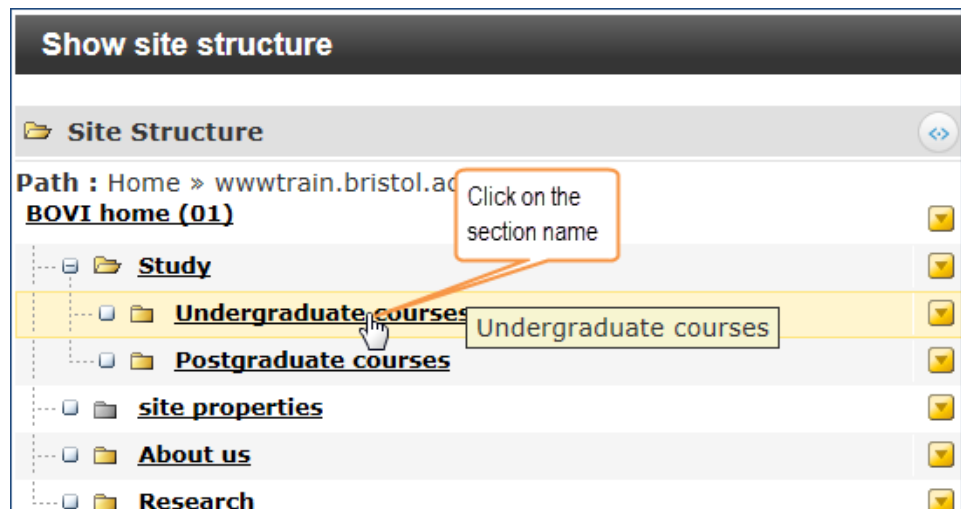
Figure 21: Selecting the Section you want to add content to

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

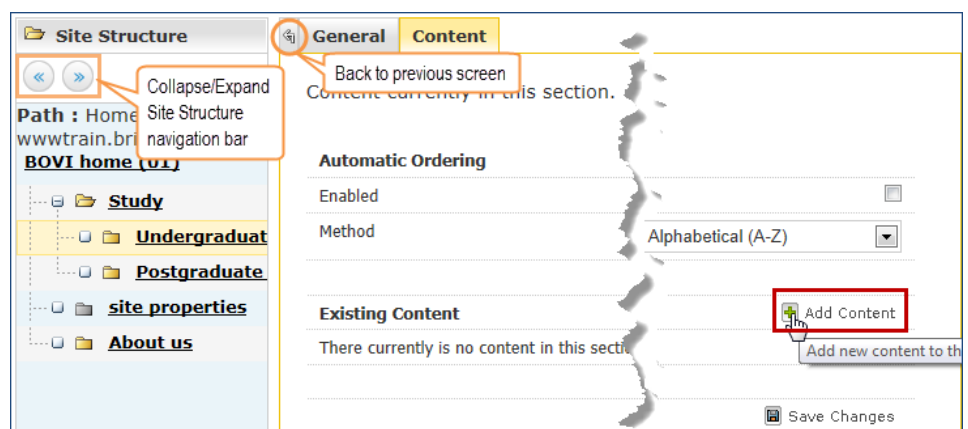2. In the Section **Content** tab, click on the **+ Add Content link** (Figure 22):

Figure 22: Section Content tab screen

Method 3: using the Content menu

1. Point the mouse cursor to the **Content menu** (not to be confused with the **Cont**ent tab showed above) and select **Add Content** (Figure 23).
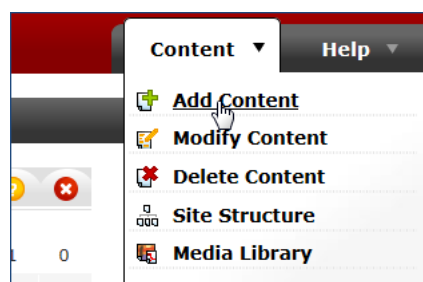
Figure 23: Adding content using the Content drop-down

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2. On the **Add Content, choose a Section** screen, navigate to and select the Section you want to add content to (Figure 24).
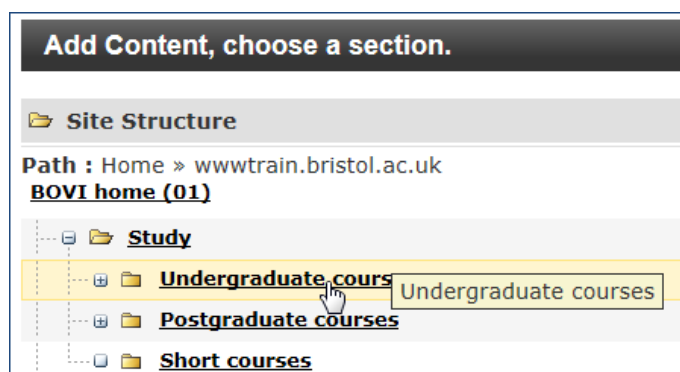
Figure 24: Choose the Section you want to add content to

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):
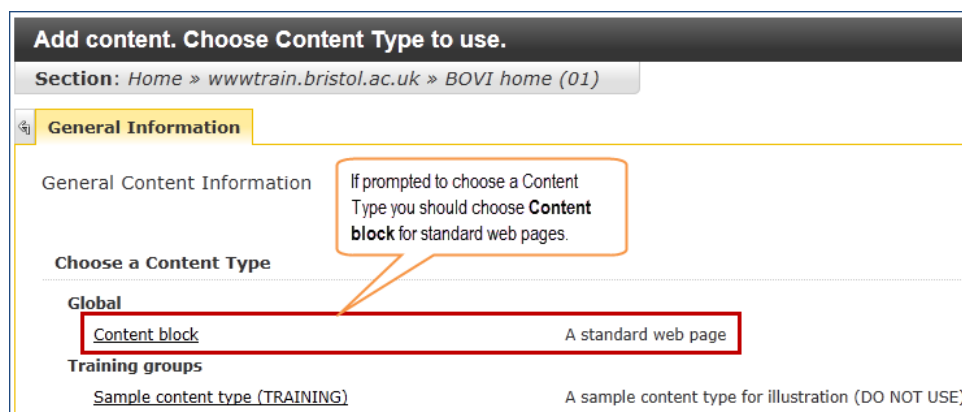
Figure 25: Choosing a Content Type

Context

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! R eference 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

   • Whenever you see the icon [**i**] 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).

Figure 27: Tool tip pop up

3. Optionally preview your work by clicking on the **Preview** button (see Figure 28) – the preview opens in a new browser tab.

To note

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:

Figure 28: Saving options when adding content

- **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).

Figure 29: Newly added content block in Content tab view

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).
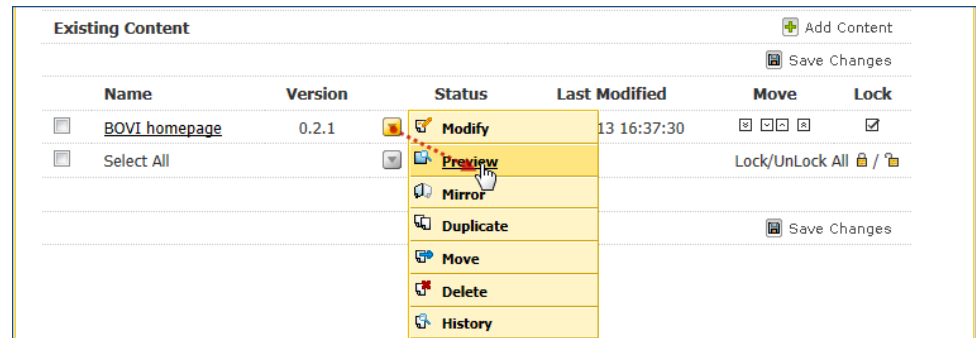
Figure 30: Previewing a content block

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.
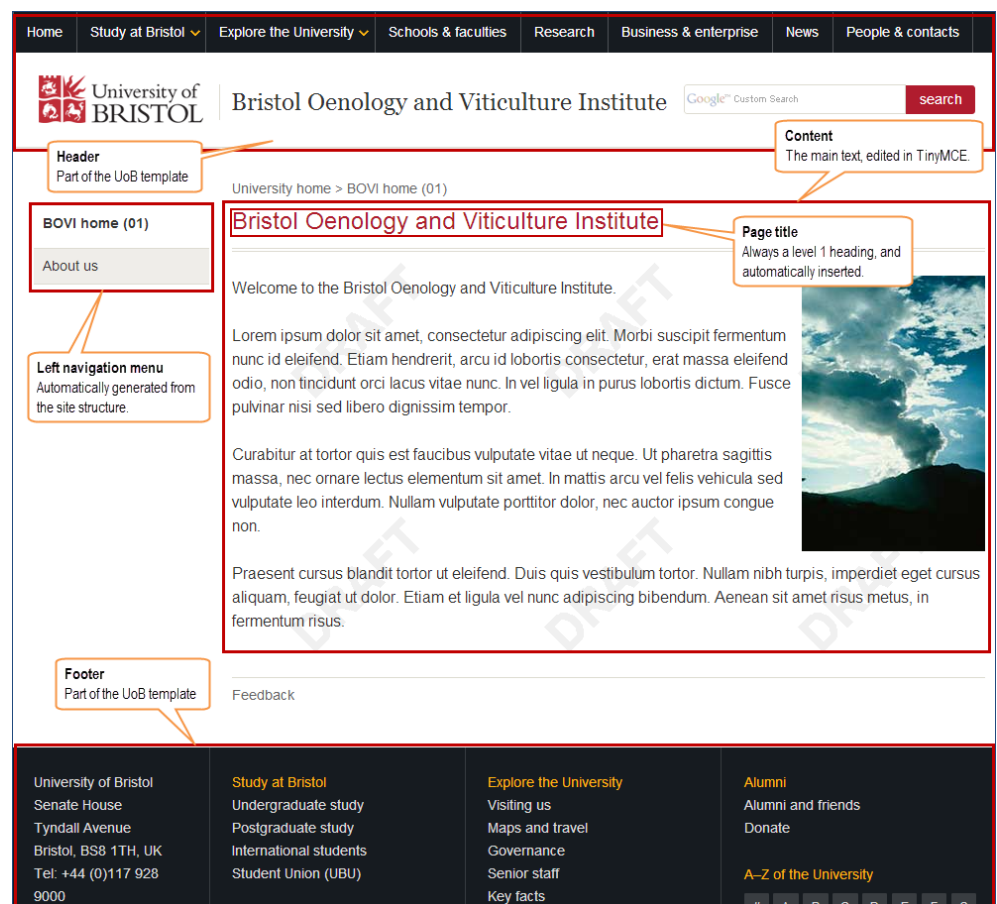
Figure 31: Preview of published page

Activity

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)
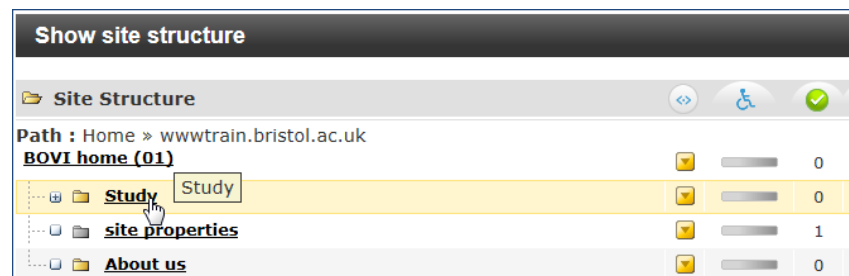
Figure 32: Clicking through the Section to edit its content

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

   or:

   ii. Point the mouse cursor to the down arrow of the content block you want to edit and select Modify (Figure 34)

Figure 34: Select Modify from the down arrow options

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):
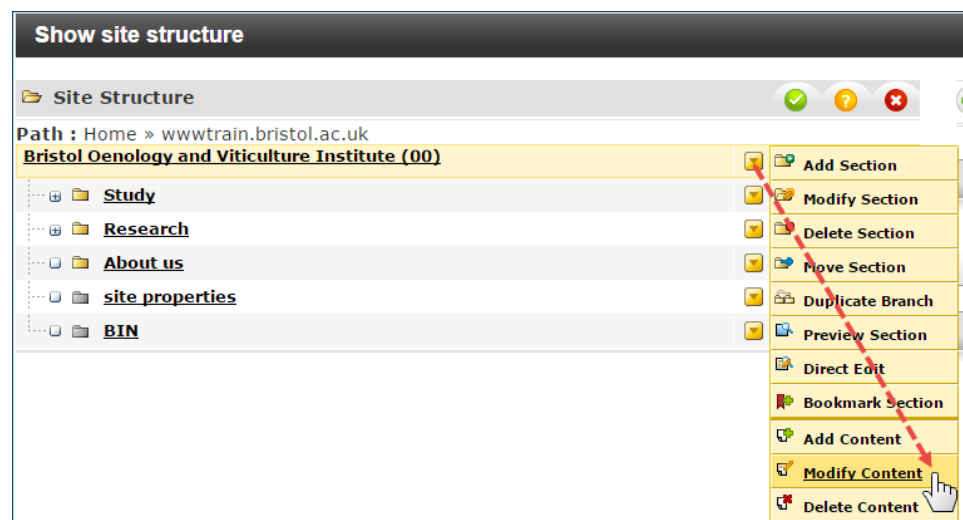
Figure 35: Modifying content using the drop-down arrow opposite the relevant Section

3. Do step 3 of the first method.

Method 3: using the Content menu

1. Point the mouse cursor to the **Content** menu and select **Modify Content** (Figure 36).
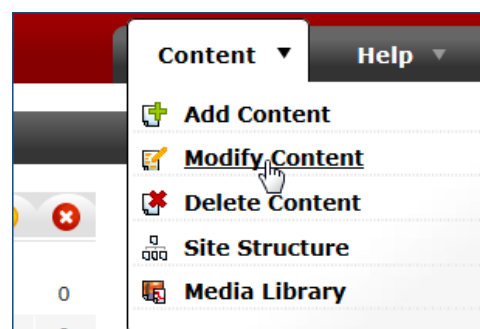
Figure 36: Modifying content using the Content drop-down

2. Next, in the **Modify content, choose a Section** screen, navigate to and select the Section you want to add content to (Figure 37).

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Figure 37: Clicking through the Section to edit its content

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).
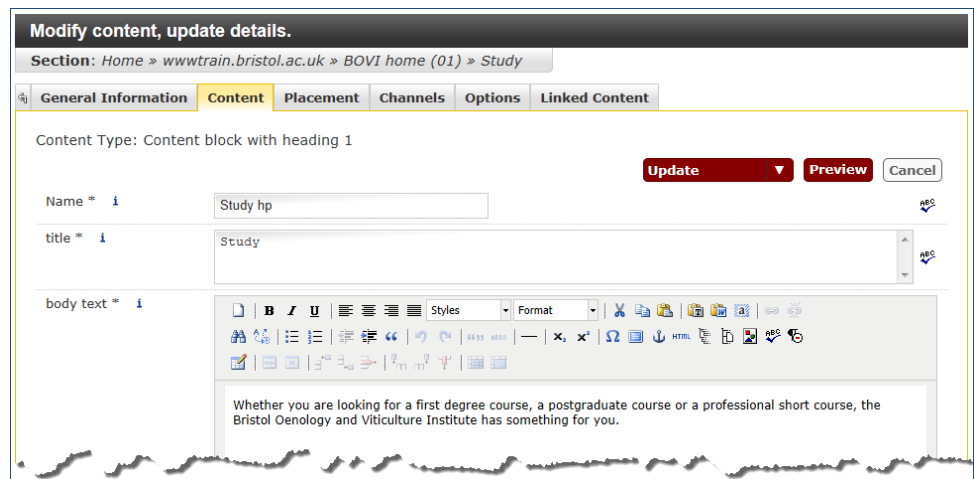
Figure 38: Modify content, update details screen

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).

Figure 39: Saving options when updating content

Activity

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.

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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).

Figure 40: Add/Modify content tabs

General Information

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

Figure 41: Add/Modify content, General Information tab

Placement

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

Figure 42: Add/Modify content, Placement tab

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

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.

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.

Figure 43: Add/Modify content, Channels tab

To note

The University website only uses one channel (called the **Production** channel), therefore you should not change the default option in this tab.

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 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

5 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):
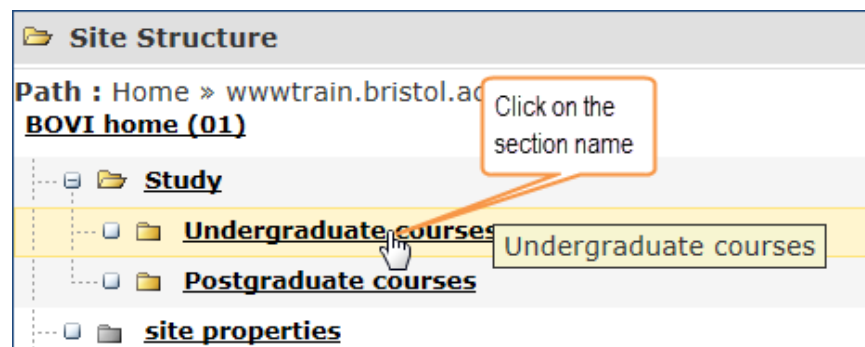
Figure 46: Locating the Section containing the content to be deleted

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):
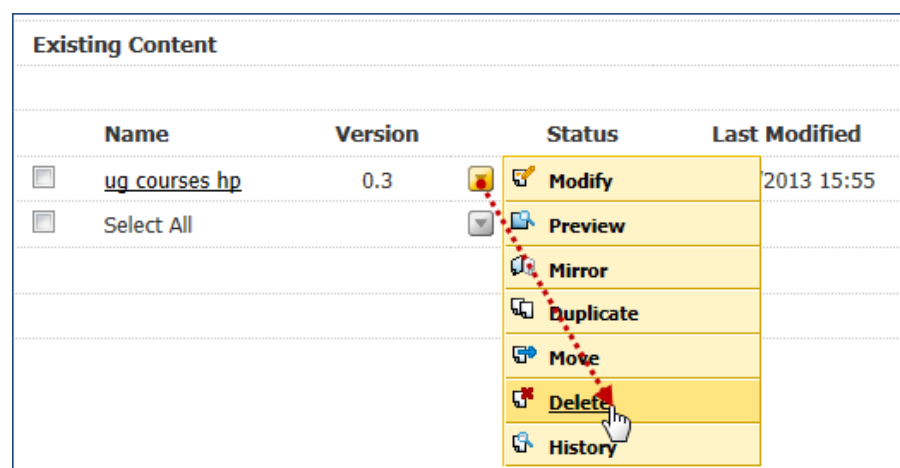
Figure 47: Selecting content for deletion

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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):
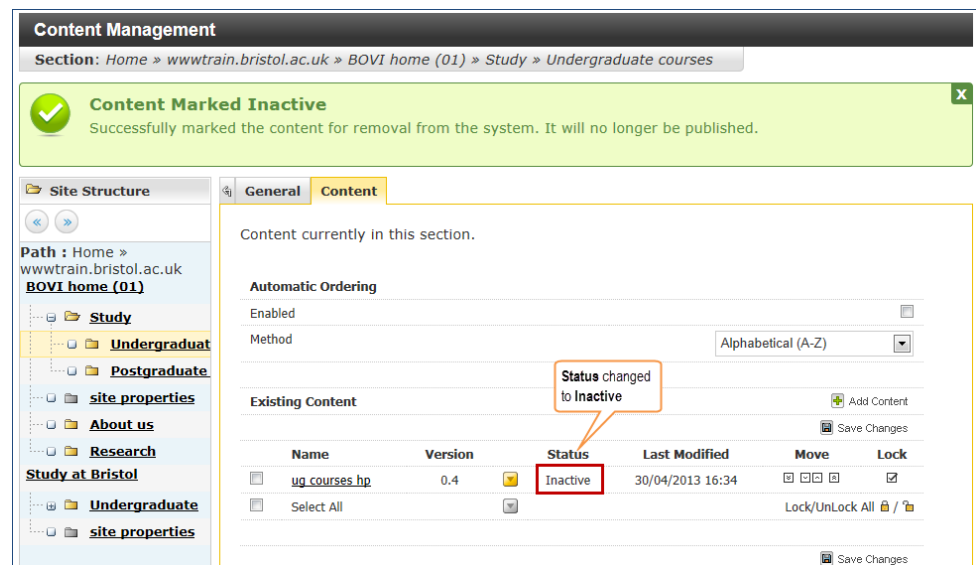
Figure 48: Confirmation of Status changed to Inactive

Warning

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):
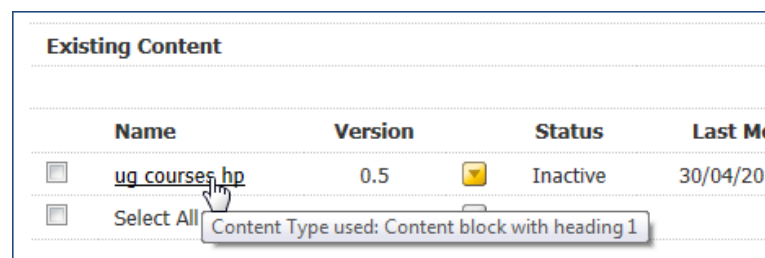
Figure 49: Opening the content block to be modified

3. In the **Modify content, update details** screen, select **Update** or **Save as Draft** (Figure 50):

Figure 50: Reinstating an Inactive content block as Pending or Draft

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:

    i.   select **Modify Content** from the yellow drop-down menu opposite the content,

    or

    ii. 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):
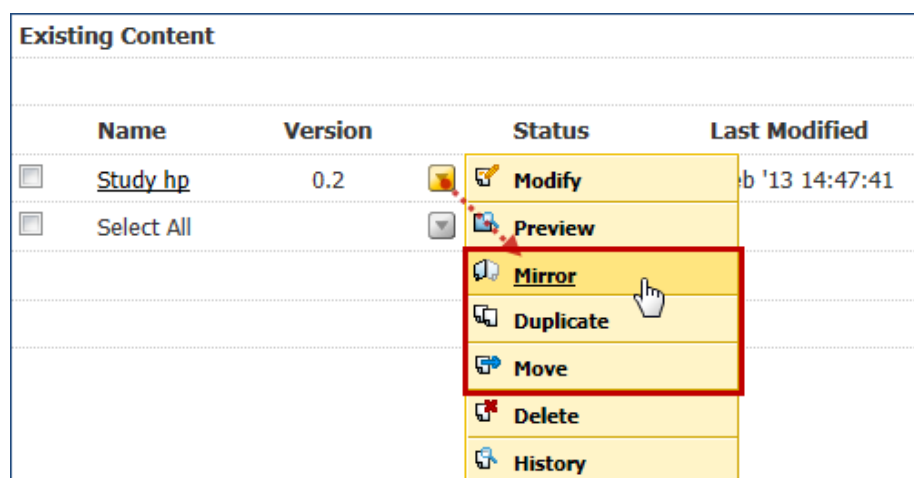
Figure 51: Moving, duplicating or mirroring content

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** (

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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.

):

Figure 52: Clicking through the Section to move content to

To note

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):
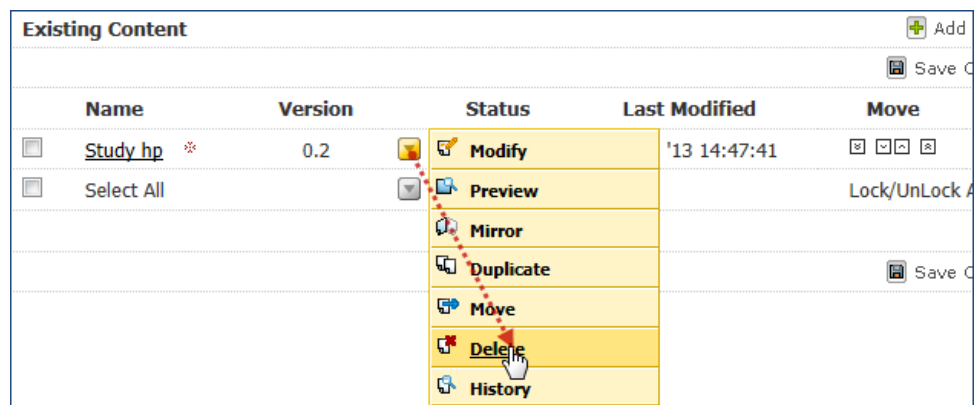
Figure 53: Removing mirrored content

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:
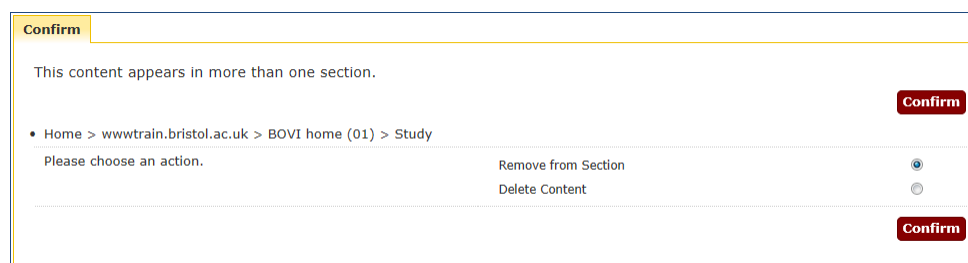
Figure 54: Confirming how you want mirrored content removed

- **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**.

Activity

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.

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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.
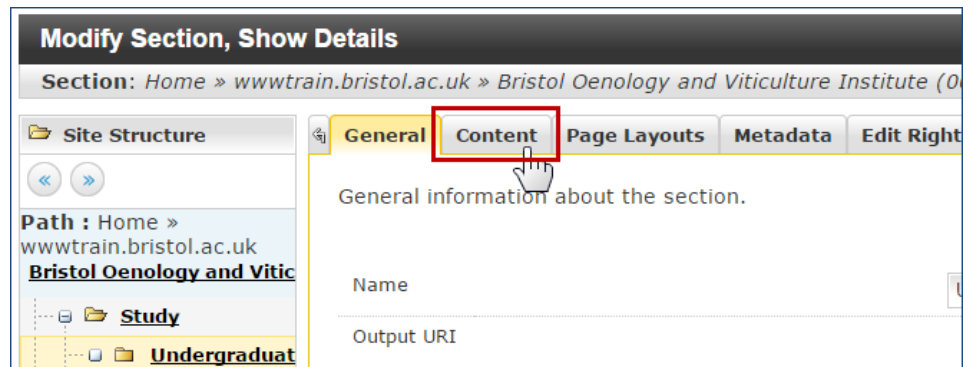
Figure 55: Accessing the Modify Section > Content tab

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).

Figure 56: using the Move arrows to reorder content blocks

   ii. **Automatic ordering**

Figure 57: using Automatic Ordering to reorder content blocks

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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):
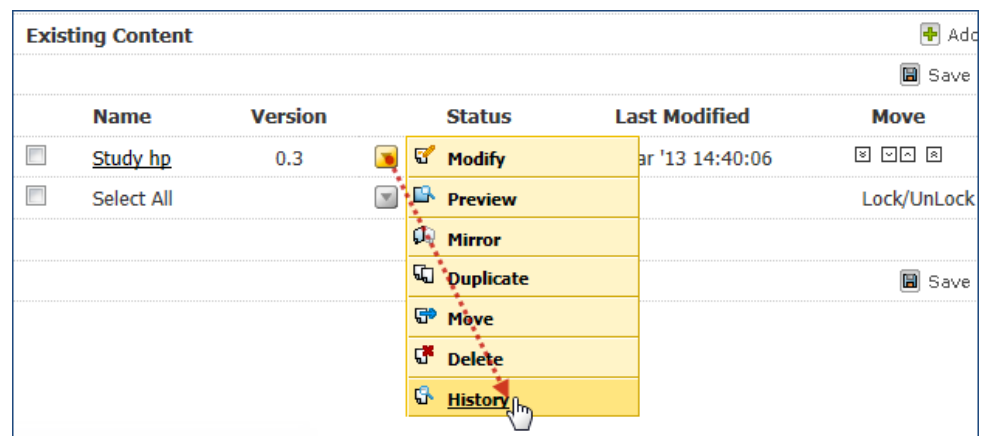
Figure 58: Accessing the history of a content block

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).
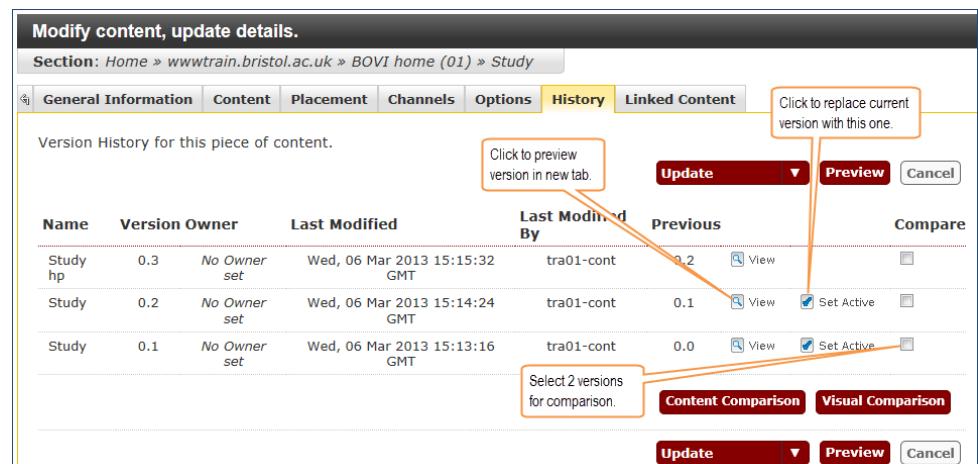
Figure 59: Modify content, History tab

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.

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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**).
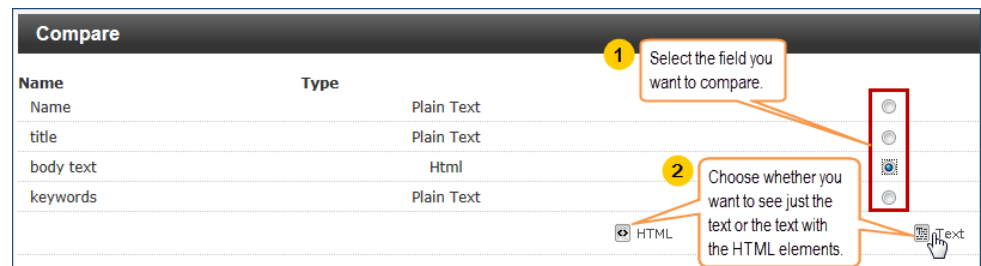
Figure 60: Compare screen options

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).
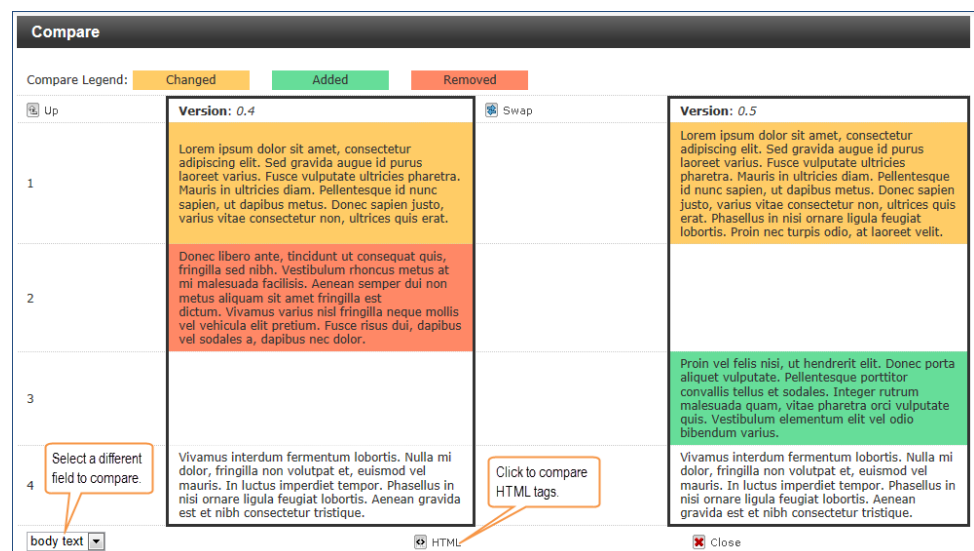
Figure 61: Comparing two versions of the same content

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.

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Activity

> **Try it**
>
> Following the instructions above:
>
> ➢ make a few changes to a content block and compare the different versions using the 2 comparison modes.

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).
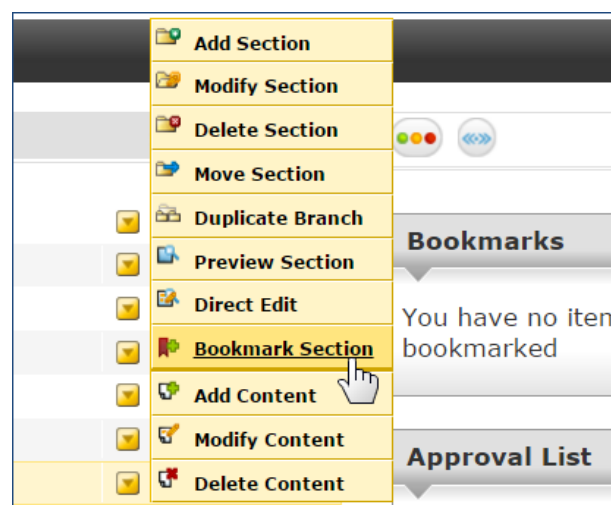
Figure 62: bookmarking a Section using the Section drop-down menu

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).

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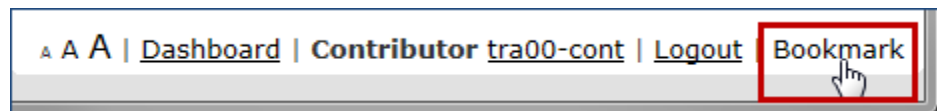
Figure 63: Bookmarking content

3. Replace the text in the **Name** field with the Section name and click **OK** (Figure 64).
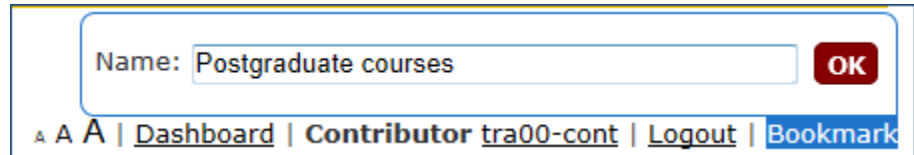
Figure 64: Enter the Section name

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).
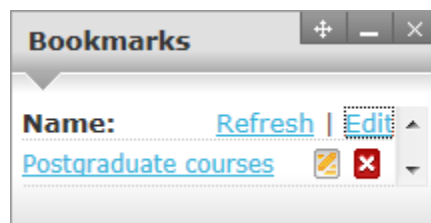
Figure 65: Modifying or deleting a bookmark

Activity
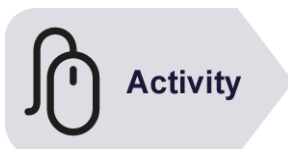
Try it

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).
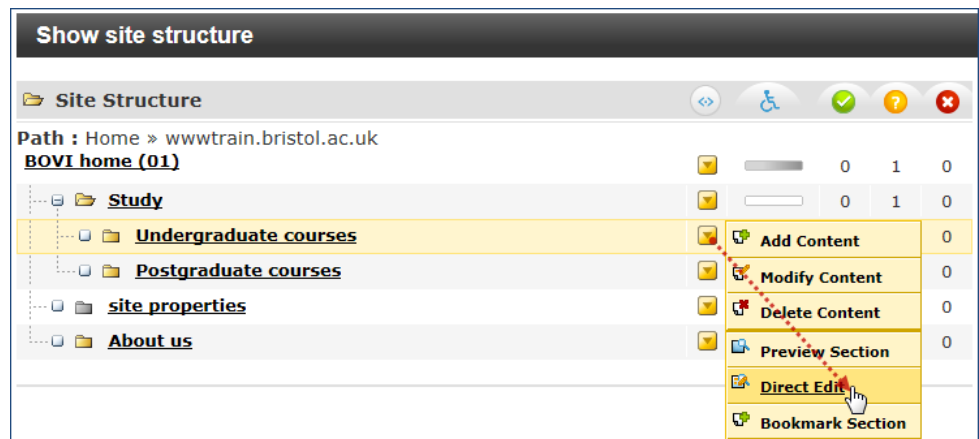
Figure 66: Accessing Direct Edit

Depending on which browser you use, Direct Edit opens in a new tab (Internet Explorer) or a new browser window (Google Chrome).

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).
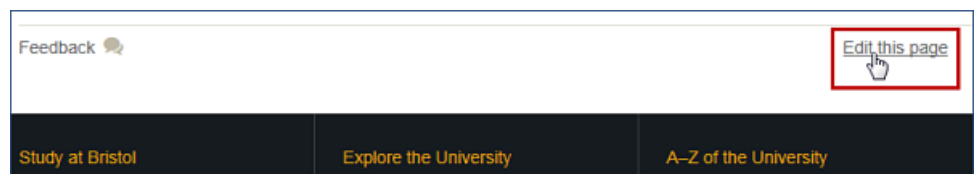
Figure 67: Accessing Direct Edit through the Edit this page link

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

6.2   The Direct Edit interface
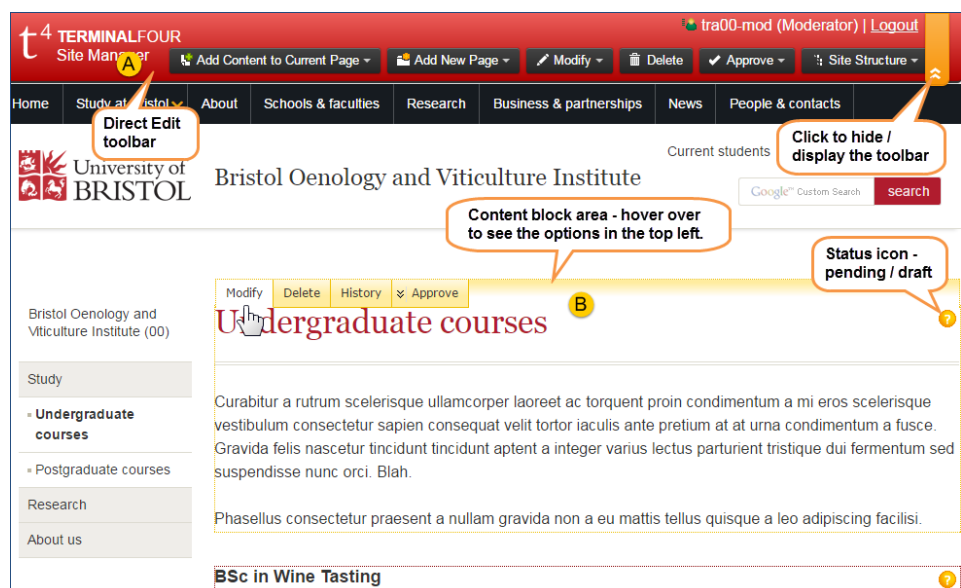
Figure 68: Direct Edit interface as a Moderator

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).
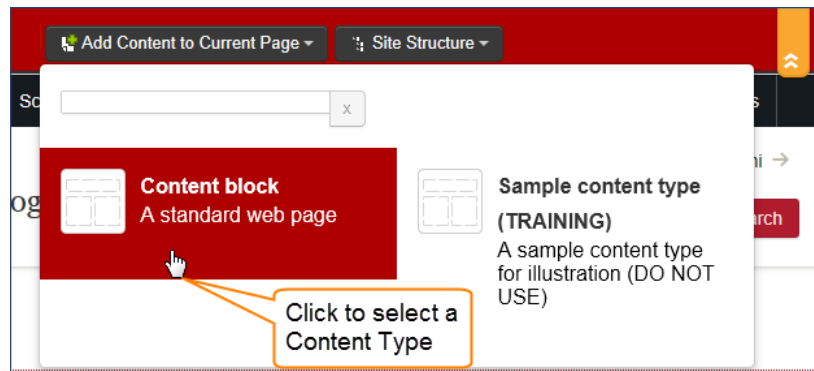
Figure 69: Adding content and selecting a Content Type

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

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Optionally you may want to fill in the **Options** tab fields (Figure 71).

Figure 71: Filling in the Options details

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).
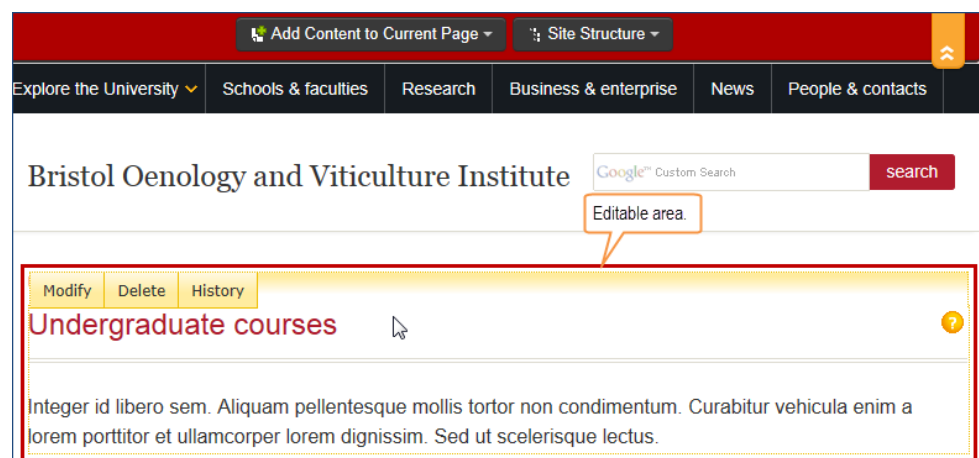
Figure 72: Content editing area in Direct Edit mode

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).
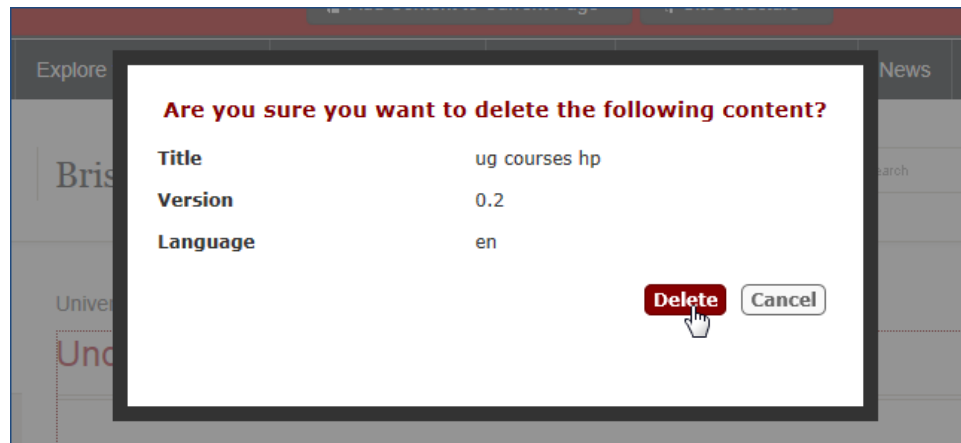
Figure 73: Confirm content deletion window

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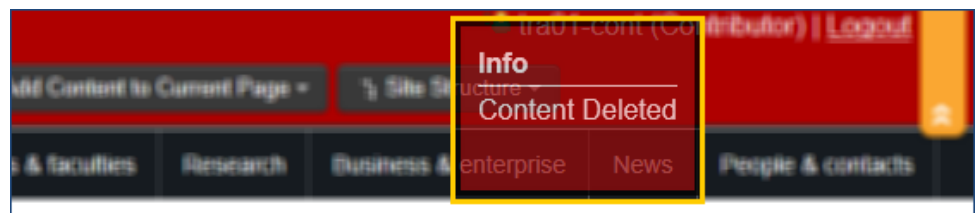
Figure 74: Content deletion confirmation message

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.
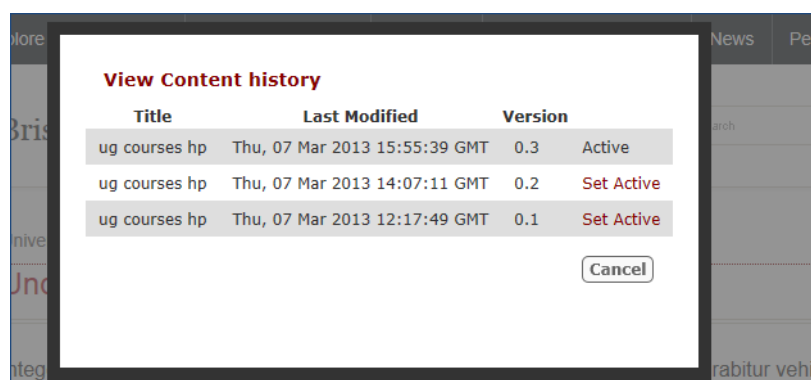
Figure 75: View Content history window

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).
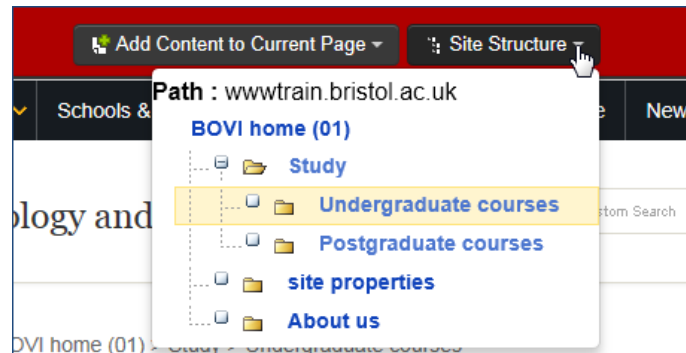
Figure 76: Site Structure pop up menu

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.

Activity

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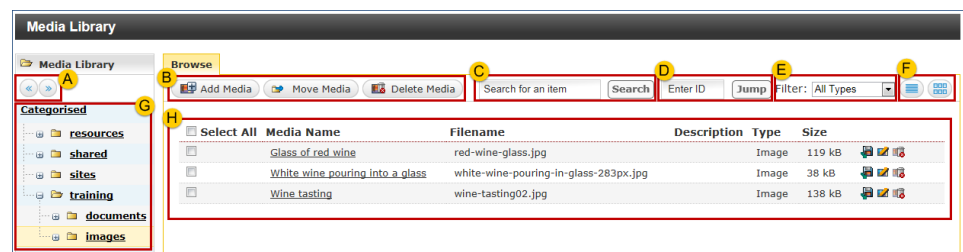
Figure 77: The Media Library interface in Detailed (list) Mode

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 areas 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).
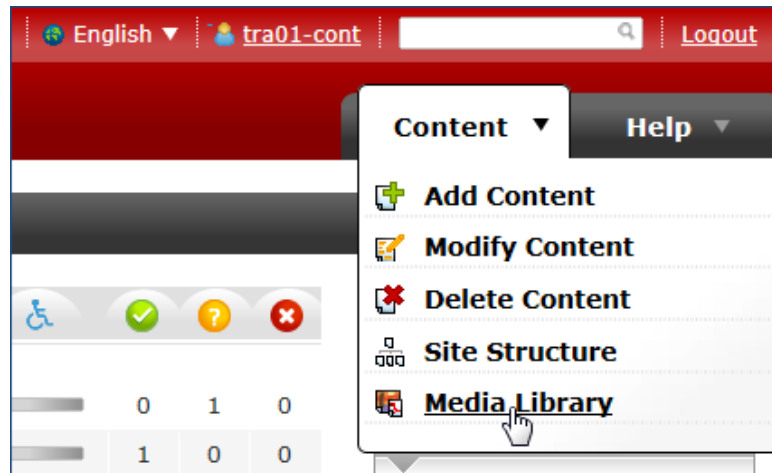
Figure 78: Accessing the Media Library

2. Expand the **sites** category on the left to find your site's top level category and sub-categories.
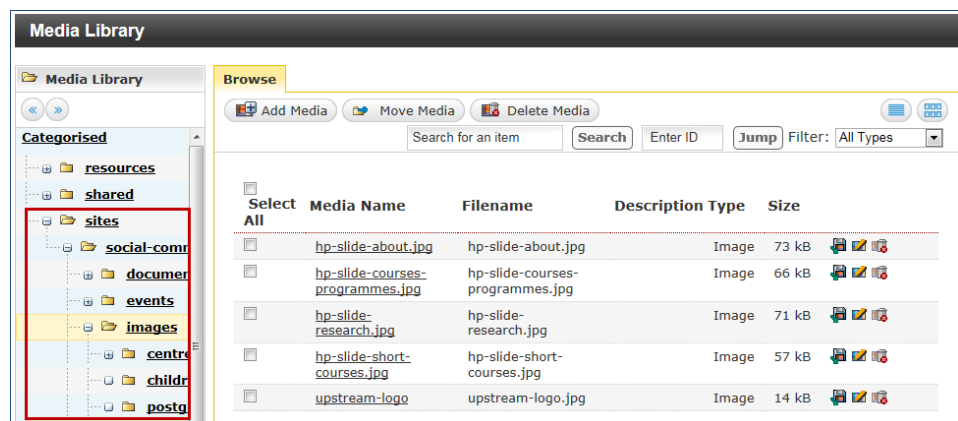
Figure 79: Finding your site's top level category

Context

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.

7.3   Uploading files to the Media Library

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).
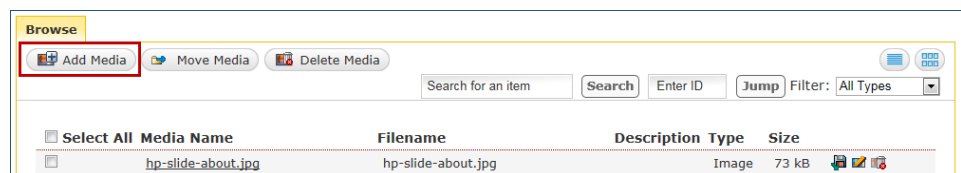
Figure 80: Add Media button

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.

Figure 81: Media Library General tab options for uploading a new media

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Warning

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):
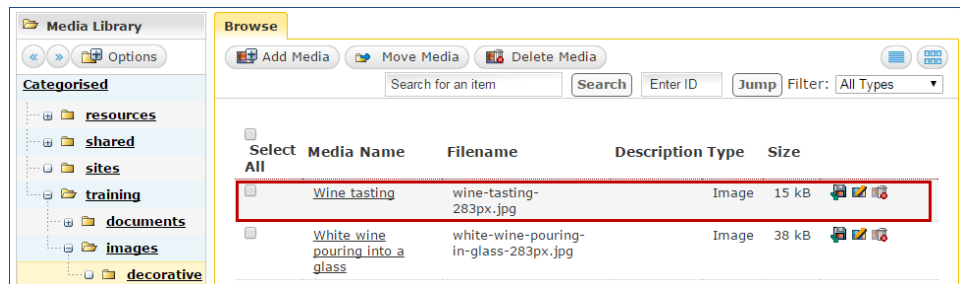
Figure 82: Newly added media

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) or Pixlr (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.

Activity

Try it

Following the instructions above:

1. **Optimise an image using Web Photo Resizer:**
   - ➢ Open 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:
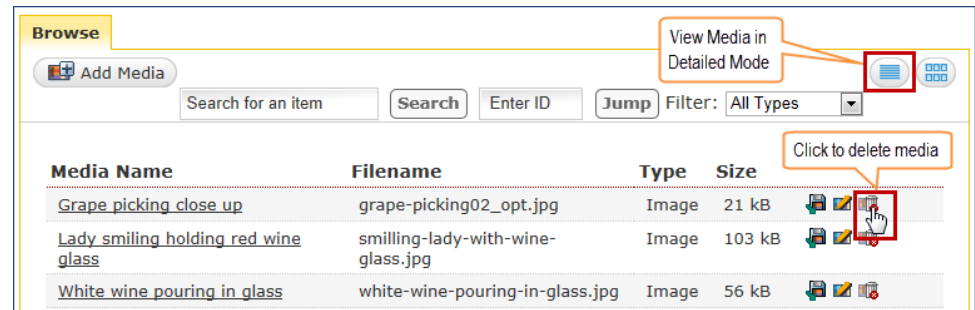
Figure 83: Deleting in the View Media in Detailed Mode

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).
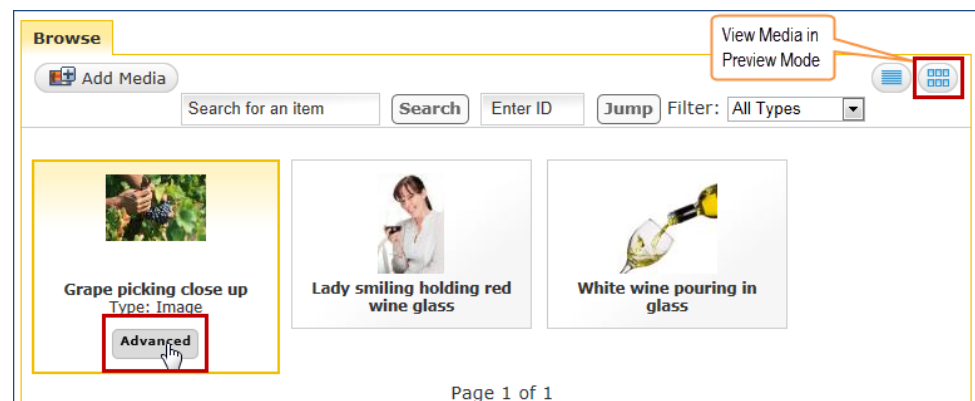
Figure 84: Deleting in the View Media in Preview Mode

This opens the media details view (Figure 85).
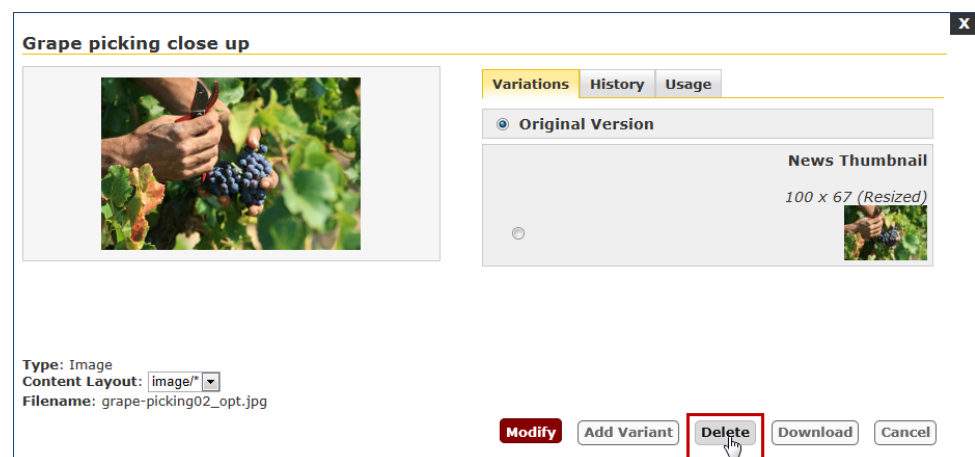
Figure 85: Media details view, Delete

2. Click **Delete** and confirm when prompted.

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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.
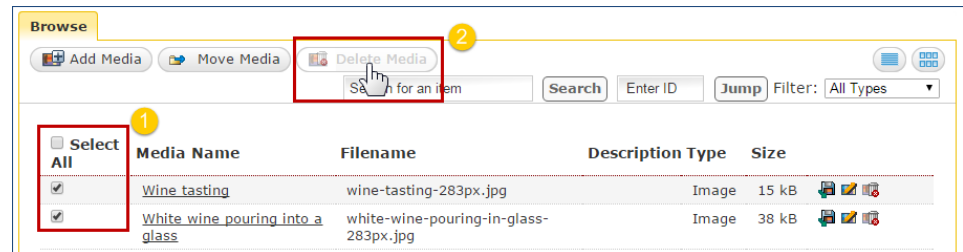
Figure 86: Deleting several files at once

Warning

Notice that if the media file you try to delete is used on a page you will receive a warning like the one below:
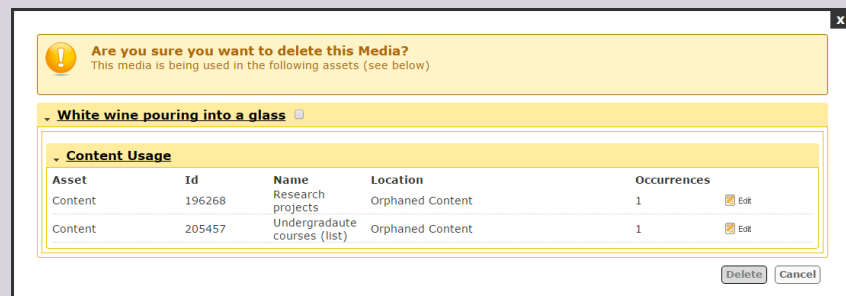
In this case **Cancel**, as this would result in a broken link on those pages that have a link to it.

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.

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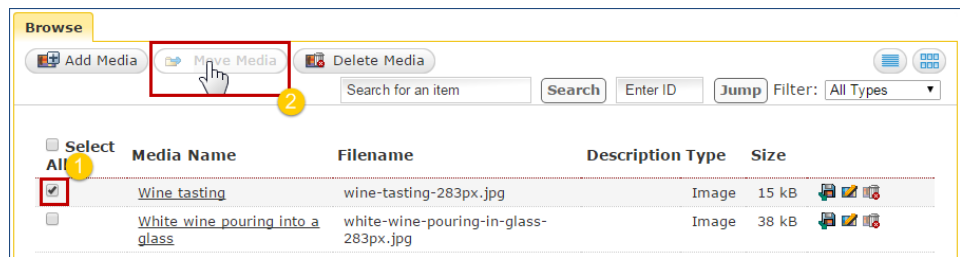
Figure 87: Moving media files

3. In the pop-up box, select the new category and press **Move Media** (Figure 88).
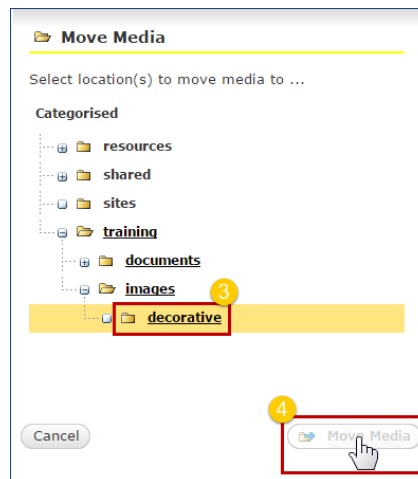
Figure 88: Selecting a new category for the file(s)

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).
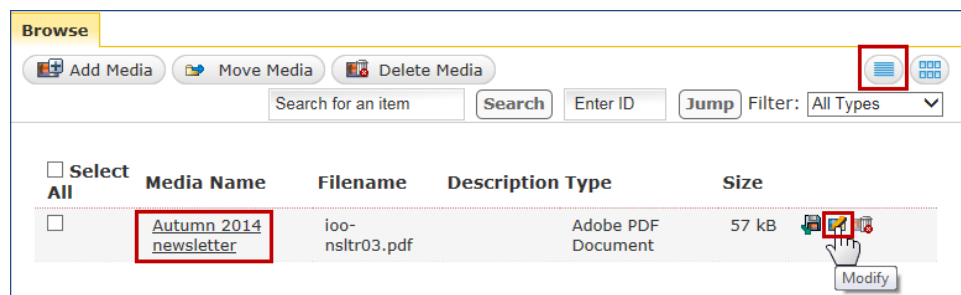
Figure 89: Modifying in the View Media in Detailed Mode

2. Select the **Categories** tab (Figure 90).

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Figure 90: Selecting the Categories tab

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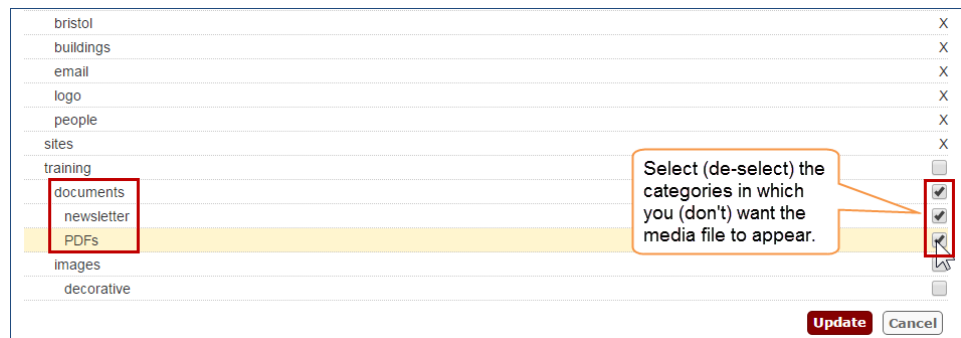
Figure 91: Selecting / de-selecting categories

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).
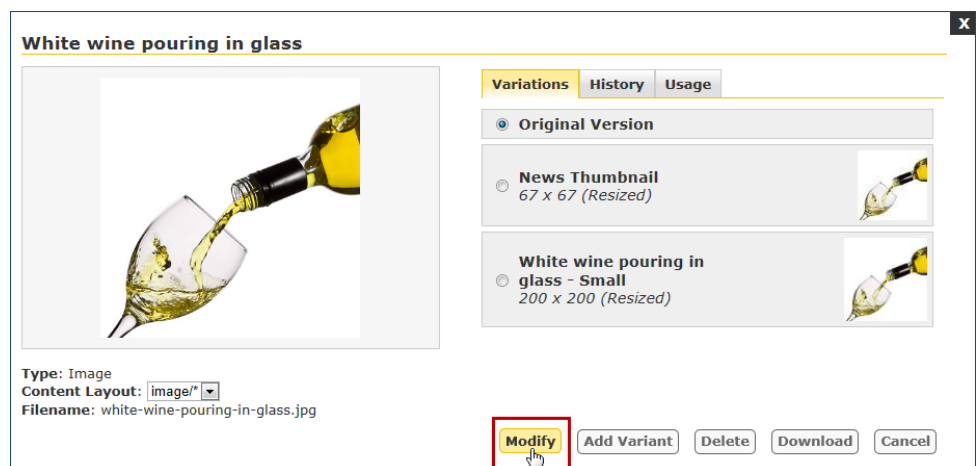
Figure 92: Media details view, Modify

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):

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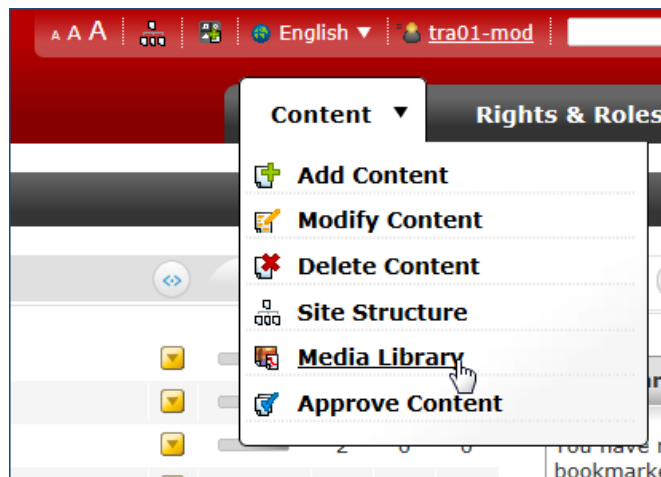
Figure 93: accessing the Media Library

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):
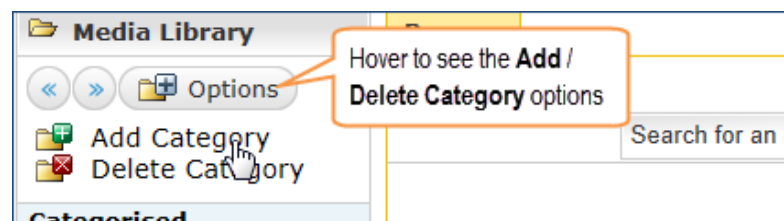
Figure 94: adding a category using the Options menu

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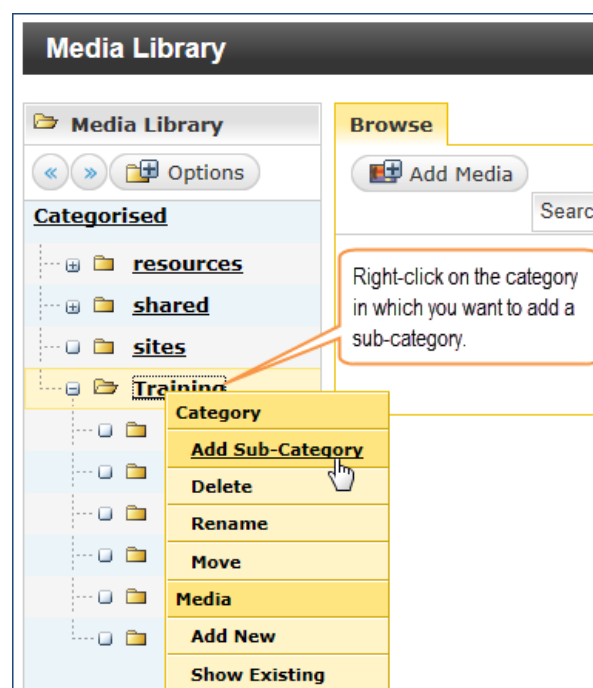
Figure 95: adding a sub-category

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Whichever method you choose, an input dialogue box pops up, prompting you to enter a name for the new category (Figure 96):
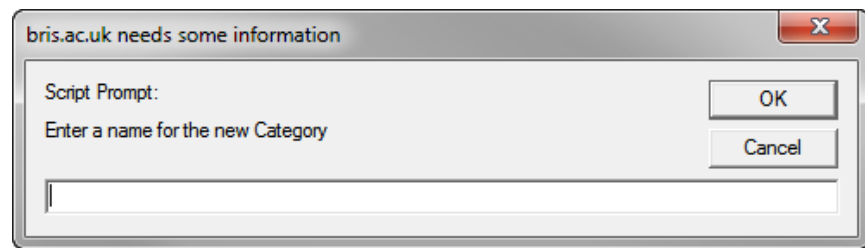
Figure 96: new category name input prompt

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.

Activity

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[1] 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.
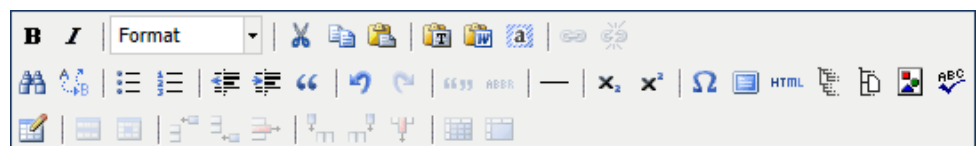
Figure 97: TinyMCE content editor toolbar

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

Warning

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.
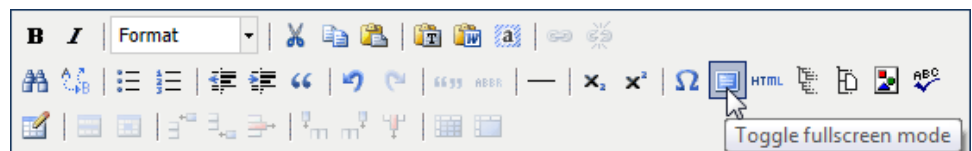
Figure 98: Switching to full screen mode for easier editing

Warning

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).
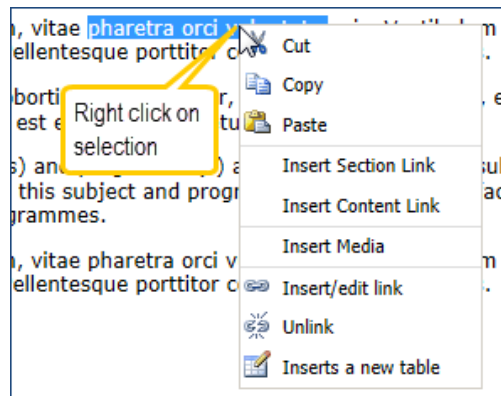
Figure 99: Accessing the context menu

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).
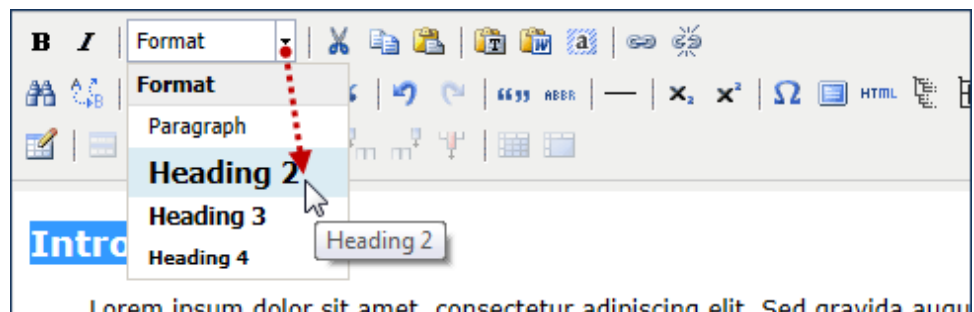
Figure 100: Creating a level 2 heading

To note

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: ⊟ for an unordered list and ⊟ 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.

Activity

> **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).
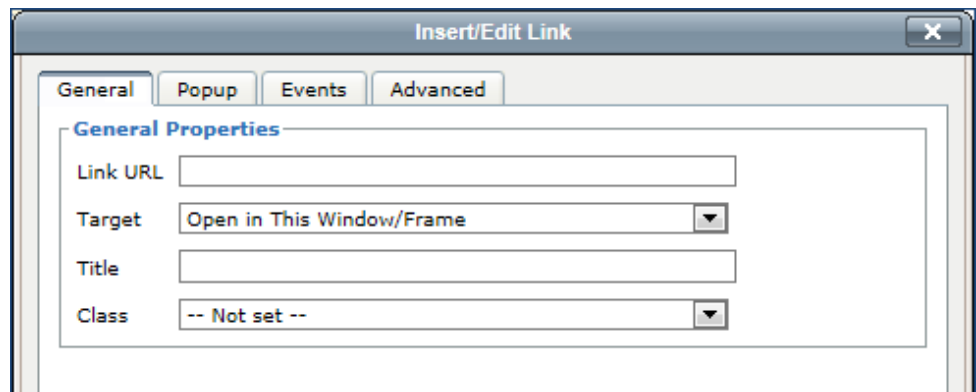
Figure 101: Insert/Edit Link dialogue box, General tab options

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).
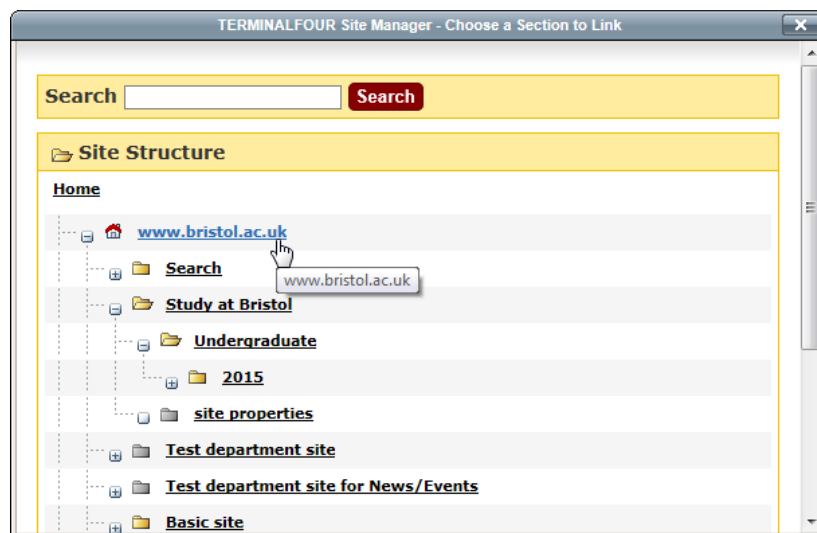
Figure 102: Choose a Section to link dialogue box

2. Using the **Site Structure**, navigate to the **Section** you want to link to.

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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.

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).
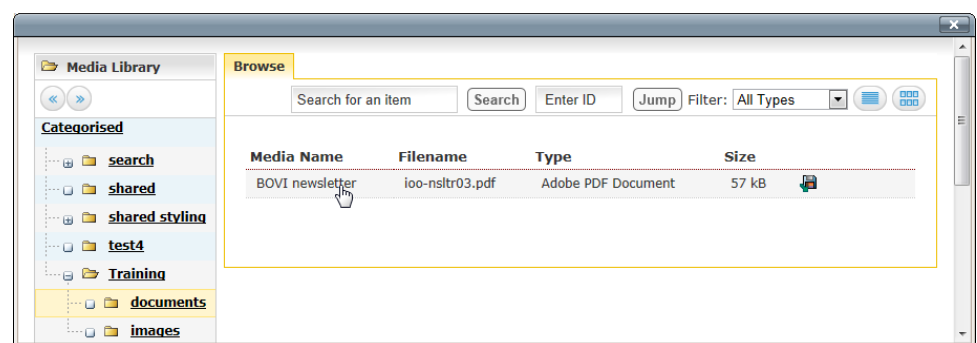
Figure 103: Media Library browser

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)

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.

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**.

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.

Activity

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 paragraph 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.

Top tip

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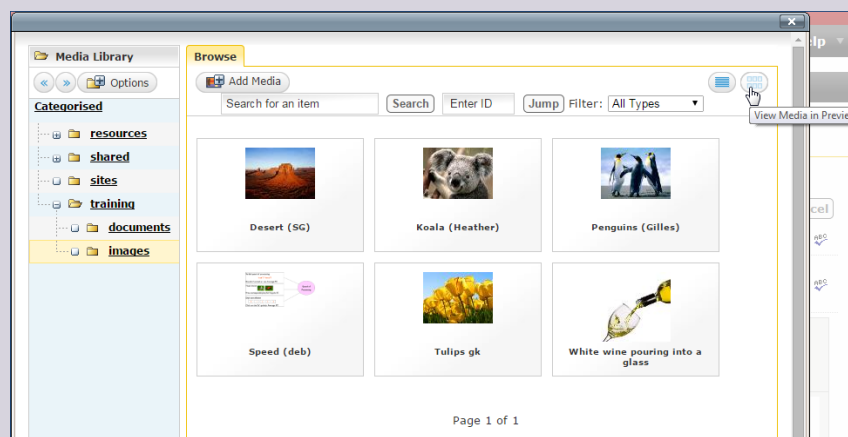
2. In the **Media Library** browser, find the image you want to insert and select it by hovering over the image and clicking **Select** (Figure 104).
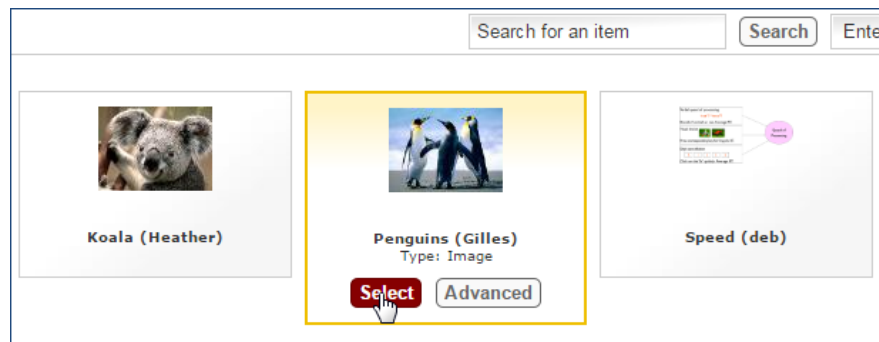
Figure 104: Selecting an image from the Media Library

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).
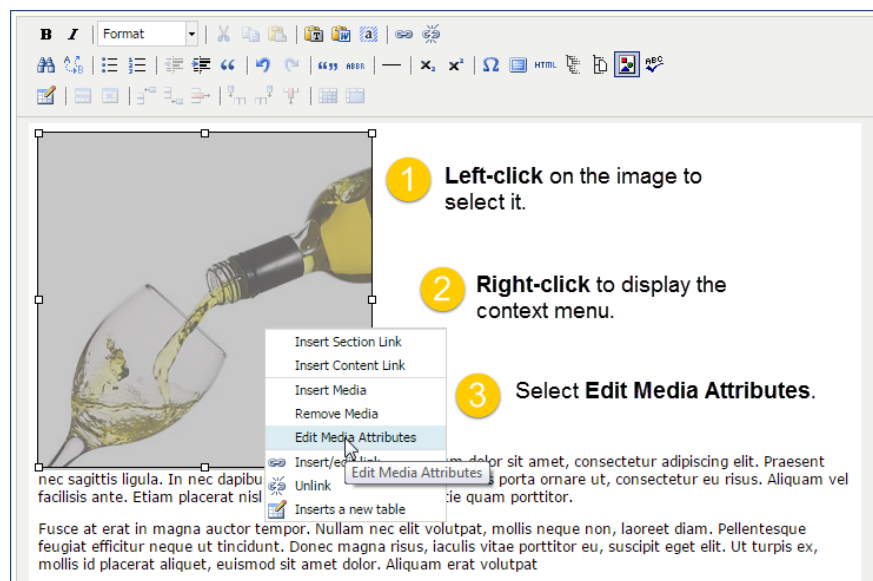
Figure 105: accessing the Media Attributes dialogue box

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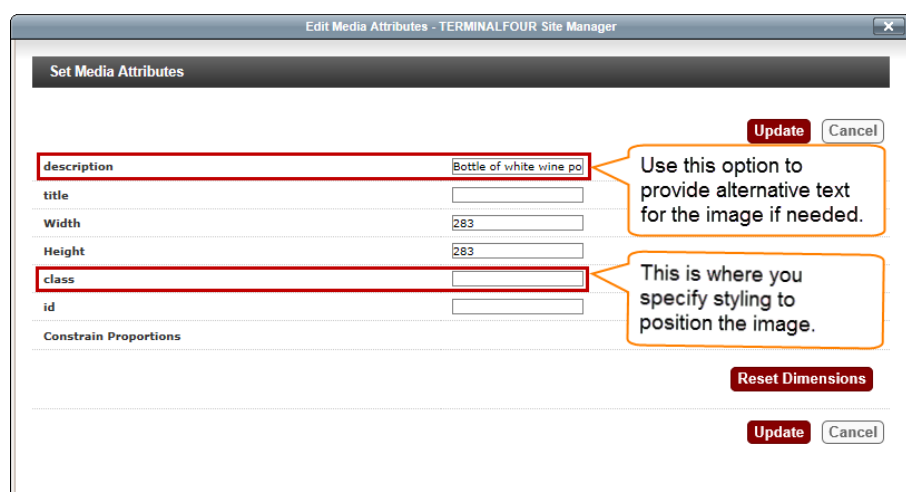
Figure 106: Setting the media attributes

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To note

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.

Top tip

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.

Activity

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

To note

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 [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.
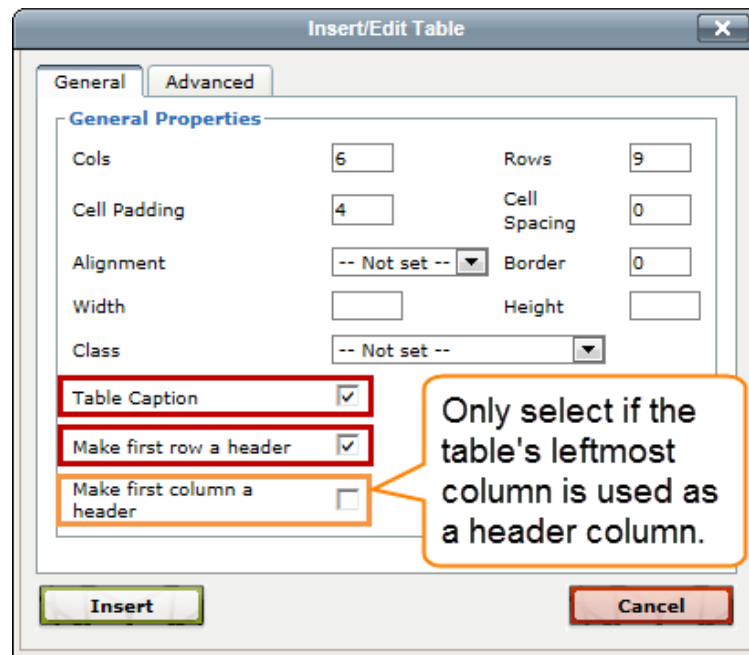
Figure 107: Insert/Edit Table General options

2. Click **Insert**.

   You will now see the outline of an empty table (Figure 108)
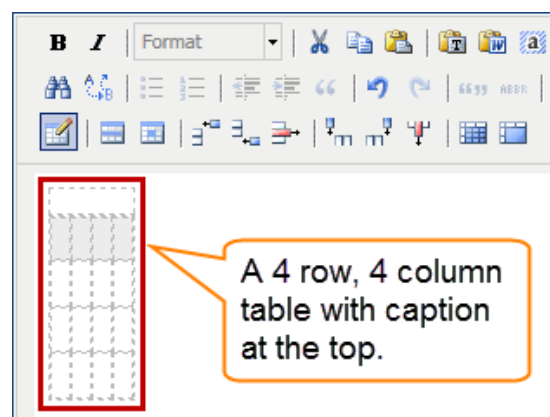
Figure 108: outline of a 4 row, 4 column table with caption

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

Context

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 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).
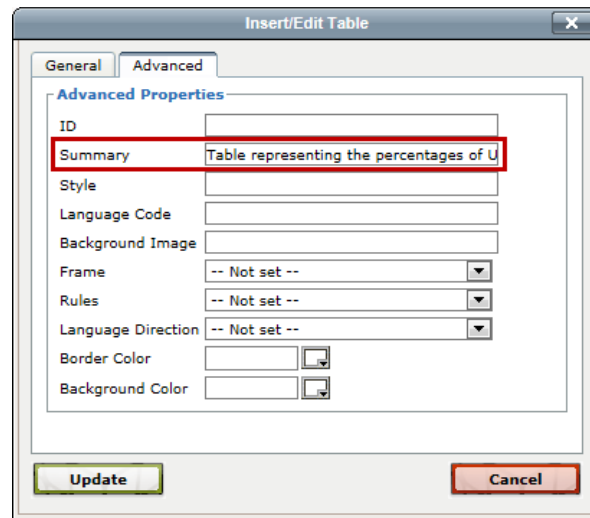
Figure 109: Insert/Edit Table Advanced options

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).
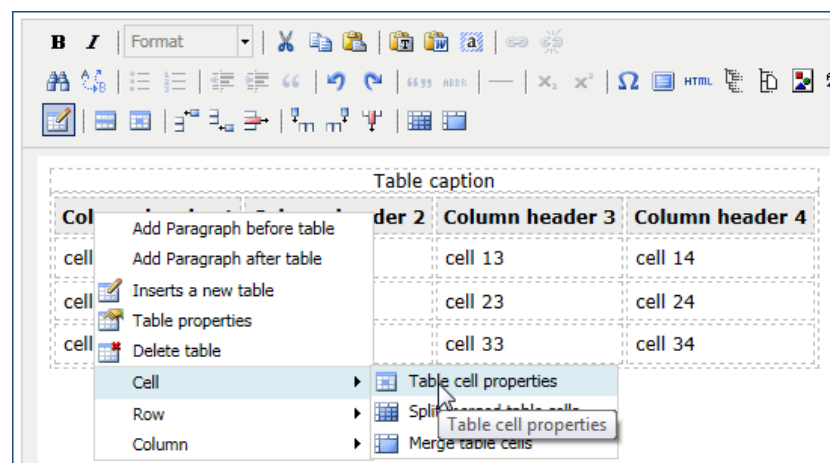
Figure 110: Selecting the Table Cell Properties

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;

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- click **Update** when done.
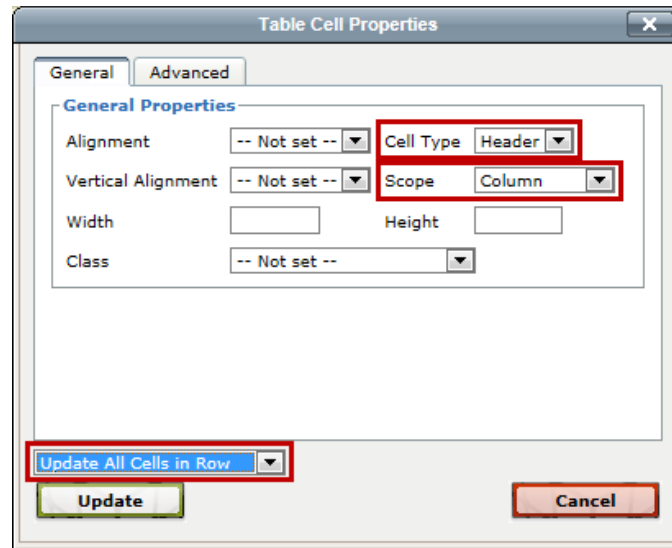
Figure 111: Table Cell Properties dialogue box

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**.
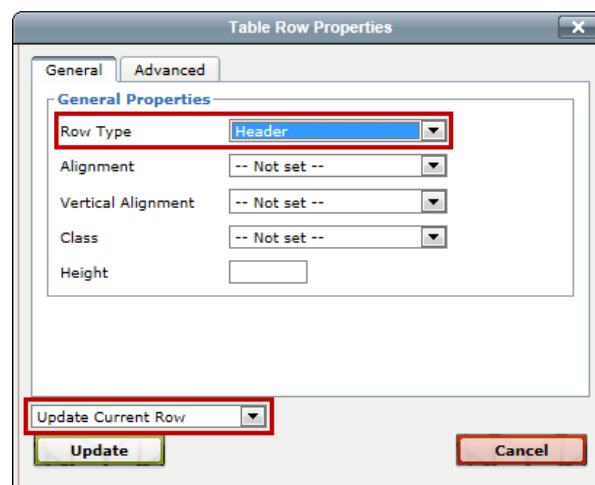
Figure 112: Table Row Properties dialogue box

Applying basic styling

1. Left-click anywhere in the table and then right-click. In the pop-up context menu select **Table Properties**.

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2. In the **Class** attribute, select **(value)** from the drop-down and type **table-basic** in the now blank field (Figure 113).

Figure 113: Adding basic styling to a table

To note

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

Activity

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:

	2012	2011	2010	2009	2008
Red Bordeaux	8	8	10	10	8
White Bordeaux	7	8	7	7	8
Red Burgundy	9	8	9	9	7
White Burgundy	8	8	9	8	7

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).
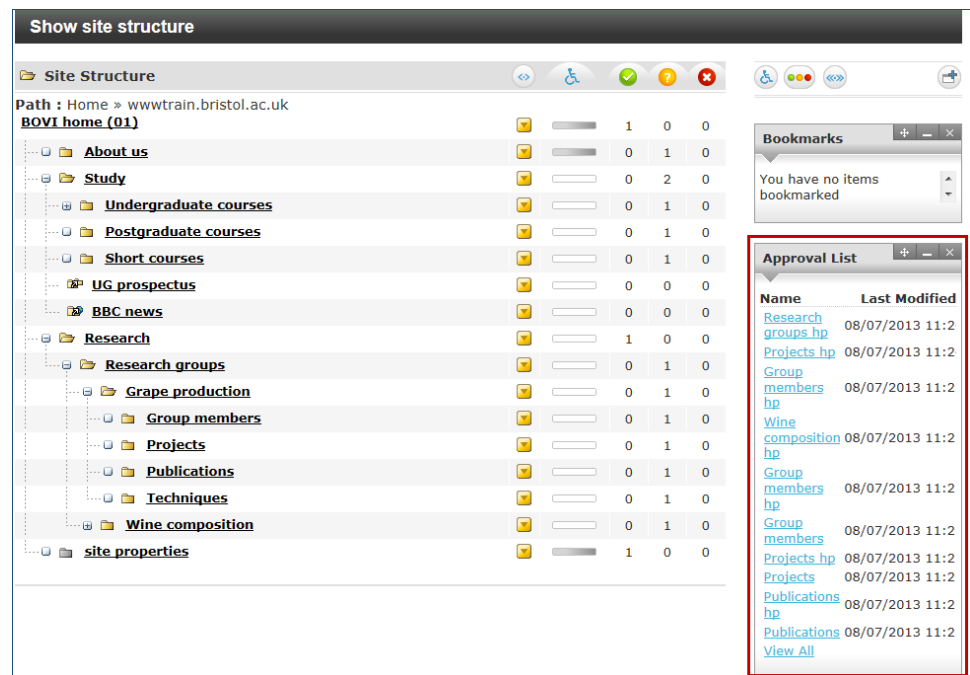
Figure 114: Approval List

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).
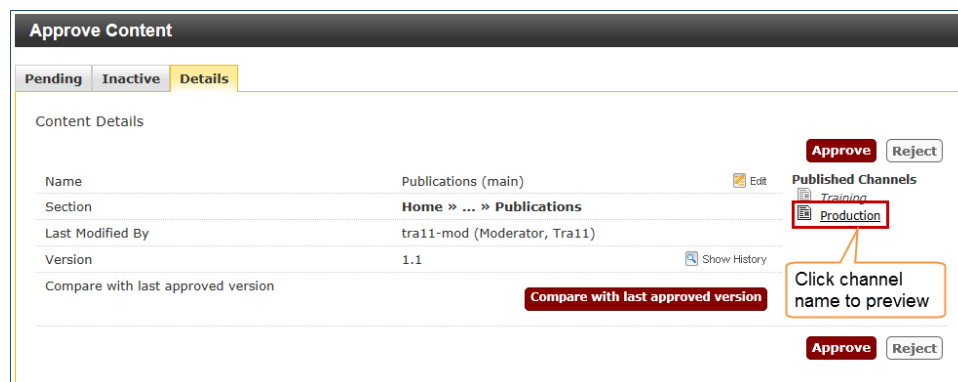
Figure 115: Approve Content screen, Details tab

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).
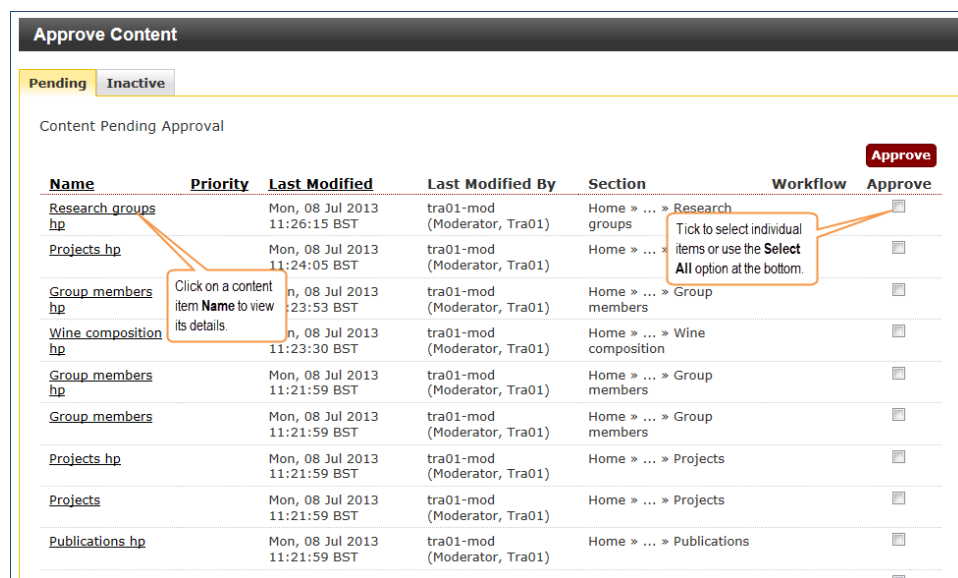
Figure 116: Approve Content screen showing list of pending content

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**.

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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 s ource 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

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.

Activity

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.
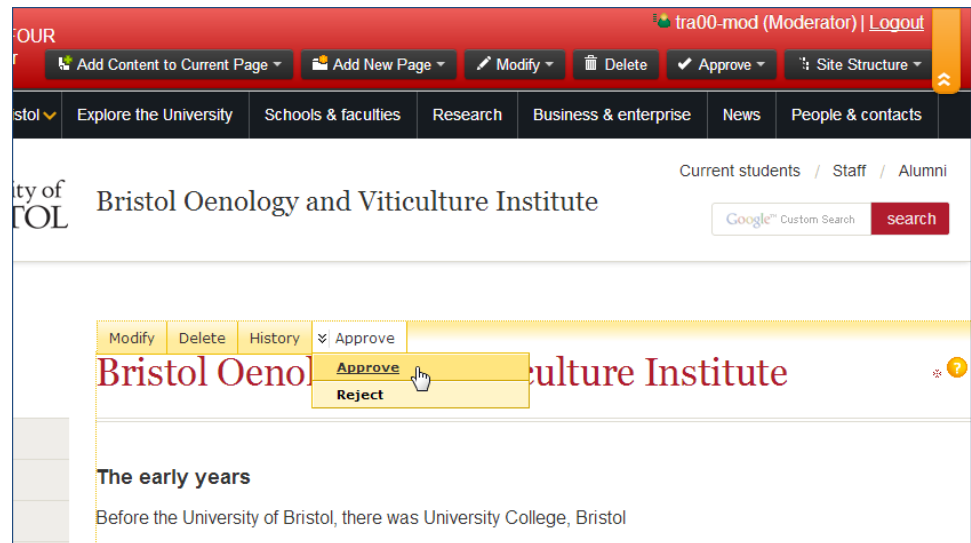
Figure 118: Approve options in Direct Edit

> **To note**
>
> You can also access the entire approval list by clicking **Approve** in the Direct Edit toolbar.

10 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.
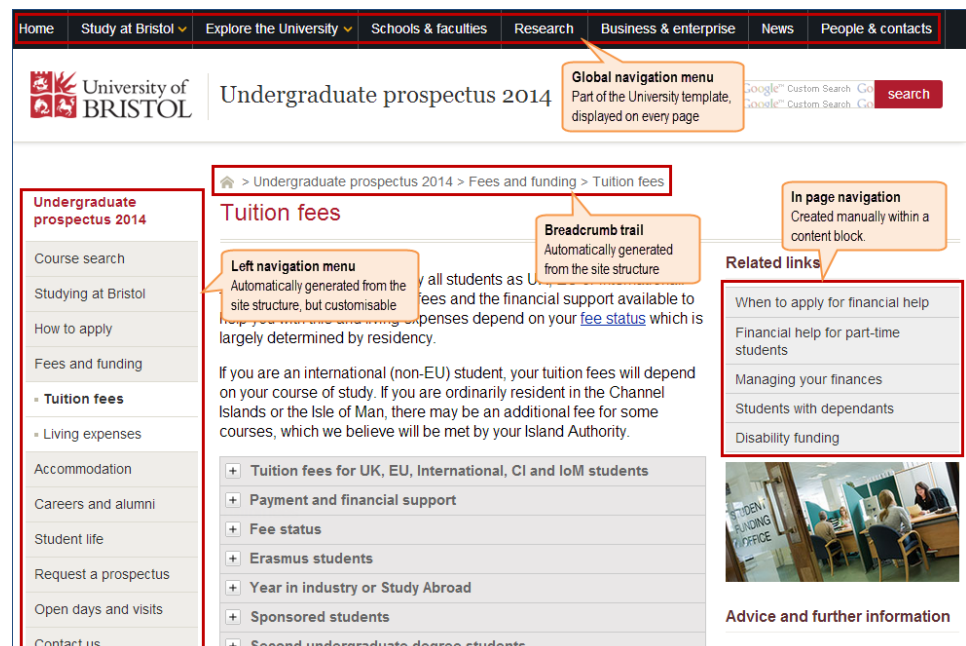
Figure 119: Navigation menus on a typical University website

There is also a 'fat' footer navigation menu containing global University links as well as an a-z index (Figure 120).
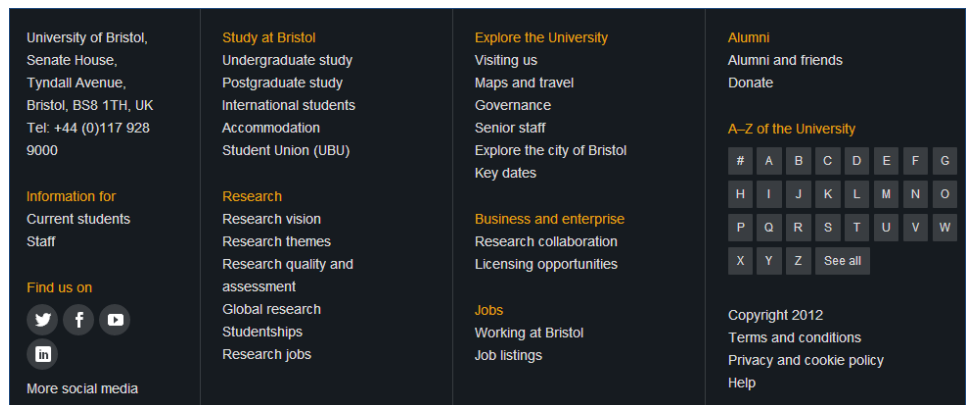
Figure 120: Global University 'fat' footer navigation menu

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 and 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).

Figure 121: Show in navigation option

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

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

4. Click **Save Changes**.

Activity
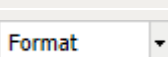
Try it

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.

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A Appendix A

Icon	Description	Icon	Description
B	Make selected text Bold	—	Insert a horizontal ruler
I	Make selected text Italics	x_2	Make selected text Subscript
Format ▾	Text formatting styles (e.g.paragraph, heading 2)	x^2	Make selected text Superscript
✂	Cut *	Ω	Insert custom character (e.g. accented characters)
📋	Copy *	▣	Toggle full screen mode
📋	Paste *	HTML	Edit HTML source
📋	Paste as plain text		Insert link to a Section within SM
📋	Paste from Word (DO NOT USE THIS WHEN PASTING FROM WORD)		Insert link to a specific content block within SM
🅰	Select all		Insert a link to a media item (e.g. image, PDF) in the SM Media Library
🔗	Insert / edit hypertext link to an external web page	ABC	Run the spell checker
🔗	Unlink (remove link)		Insert a new data table
🔍	Find		Edit table row properties
🔍	Find and replace		Edit table cell properties
☰	Format selected paragraphs as unordered (bullet) list		Insert new table row above / below
☰	Format selected paragraphs as ordered (numbered) list		Delete table row
⇥ ⇤	Outdent / Indent (use the latter to create sub-lists)		Insert new column before / after
"	Format paragraph as blockquote		Delete column
↶ ↷	Undo / Redo previous actions		Split merged table cells
""	Format selected text as a Citation		Merge selected table cells
ABBR	Format selected text as an Abbreviation		