Using the Content Management System

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Introduction

This guide was prepared by Computing & Communications in order to provide a general set of instructions for using UCR’s Content Management System (CMS). Please note that functions and features of the CMS are likely to change and it is highly suggested that you visit UCR’s CMS Support Site at http://cms.ucr.edu in order to retrieve the most up-to-date information. Additionally, should you require assistance beyond this document, please visit the CMS Support Site for further information.
Logging In

The Content Management System employs the UCR CAS (Central Authentication Service) login, which uses your UCR NetID to authenticate. To login to edit a web page:

1. Browse to the page that needs to be edited.
2. Click the "Last modified:" link at the bottom of the page.
3. At the CAS login screen, type your NetID and password and click Login.
4. Once logged in, the editable version of the page will be displayed.
Using the Editor

All of your web pages can easily be edited within the CMS Editor. Below are some guides that cover most of the functions you would need for editing and creating pages within the CMS.

Getting Started

When logged in, a preview of the page showing the available editable regions will be displayed. A green edit button denotes an editable region. Available editable regions will vary depending on the user's role within the CMS; not all areas are available to all users. Click the "edit" button to begin editing a region.
Basic Text Editing

The UCR CMS employs a WYSIWYG (What You See Is What You Get) editor that is very similar to commercial word processing software (e.g. Microsoft Word) and allows interaction with the text in a very similar fashion to a word processor.

Selecting Text

- Click and drag the mouse across the text to highlight.
- Double-click to highlight a particular word.
- Triple-click to highlight an entire line.
- Selected text can be dragged to other places within the editable region.

Applying Formatting

- **Basic formatting:** The Bold, Italic, Underline, and Strikethrough buttons will change the appearance of text.

- **Lists:** Unordered (bulleted) and Ordered (numbered) lists are available in the toolbar. Start a new list by clicking the button, or apply list formatting to existing text by highlighting the text and pressing the appropriate List button.
  - Hitting the Enter key at the end of each list item will automatically create a new list item.
  - To create new text outside of the list, press the List button twice to remove list formatting.

- **Indentation:** To create a nested list, create a new list item by hitting the Enter key on the keyboard, then click the Indent button. To create a new item in the outer list, click the Outdent button.

- **Superscript and Subscript:** Click the Superscript or Subscript buttons to start typing new subscript or superscript text, or highlight existing text to apply formatting. Press the button again to exit that formatting mode.

- **Text Alignment:** Left-justified, centered, right-justified, and full-width justified text alignment is available. Either click the appropriate button before beginning typing, or highlight existing text and press the button to apply formatting.

- **Format:** In the Format pull-down menu a number of pre-defined styles are available. Most text should be formatted with the Paragraph style. The UCR
design standard dictates that only Heading 3 through Heading 6 should be used for web page content areas.

- **Text color:** The Text Color button should be used sparingly, as most text styling will be handled automatically by the CSS (cascading style sheet), which is applied upon publishing. If a different text color is needed, either press the button to choose the color and then begin typing, or highlight existing text and press the text color button to apply a new color.
**Pasting Text**

The UCR CMS WYSIWYG has the ability to cut, copy and paste text to and from the editor. This can be done either by using the copy, cut, and paste buttons on the WYSIWYG toolbar (note that the Cut and Copy buttons only work in Internet Explorer under Windows operating systems), or by pressing Ctrl-C (copy), Ctrl-X (cut) or Ctrl-V (paste).

In addition to standard copying and pasting, the CMS includes a special paste function:

- **Paste as Plain Text**: The Paste as Plain Text button works in a similar fashion to Paste as Word, but removes all formatting from the pasted text.

This can be used as an alternative to Paste from Word, and is often useful when pasting from email programs such as Outlook or Eudora.
Adding Hyperlinks

To add a hyperlink, first highlight the text you want to add the hyperlink to, and then click on the hyperlink button in the toolbar.

![Image]

This will bring up the Link Manager.

- **To link to internal pages (pages within the same site):**
  1. Click the Browse button next to the Link URL field.
  2. Browse to the appropriate page and click on it.
  3. Click the Select File button at the bottom of the window.

- **To link to external pages:** Type the address of the page you wish to link to in the URL field.

- **Opening a link in a new window:** In general it is best to have links open in the current window, unless there is a specific need to launch a new window. If a new window is required, set the Target field to "Open in new window (_blank)."

- **Adding a title:** The Title field will be displayed when a user mouses over a link without clicking it, and can be used to describe the link. This field is optional.

Click the **Insert** button at the bottom of the window to return to the editor.
Adding Images

To add an image:

1. Position the cursor where the image should go.
2. Click the **Insert Image** button in the toolbar.

3. In the Image Manager, click the **Browse** button.
4. The File Browser will launch in the Images directory.
   a. If the image is already in that folder: click its filename and click the **Select File** button.
   b. If the image is not yet on the server, click the **Upload** button.
   c. Click the **Browse** button and locate the file on your computer.
   d. Click the **Upload Image** button.
5. Enter a brief description of the image in the **Image Description** field; this satisfies the requirements of *Section 508 Accessibility Standards*, and the CMS will not let you proceed without entering text in this field.
6. Enter a brief description of the image in the **Title** field. This can be the same as the text in the Image Description field. This is optional but recommended.
7. Click the **Appearance** tab and choose an alignment style from the Class menu, either "**IMG float right**" or "**IMG float left**" depending how the image should be placed on the page.
8. Click the **Insert** button.
Style & Formatting

- **Font formatting**: Websites configured in the CMS will automatically assign the proper font for text that appears on the website. The formatting will correctly apply for any text written in the paragraph (<p>) style. Alternate fonts should never be applied in the CMS Editor, as this will interfere with the campus design specifications.

- **Text Format**: A number of text styles are pre-defined in the Cascading Style Sheets (CSS) that are automatically applied to web sites within the CMS; most web page text will be in the Paragraph style, but a number of heading styles are also available.

- If text does not appear to be formatted correctly, highlight the incorrect text and click the "Remove formatting" button in the toolbar. If necessary, choose the correct styling from the Text Format pull-down menu.
Saving & Publishing

As with any other electronic document, it is crucial to save frequently. In the CMS, it is important to note that saving a page does not automatically update that page on the live site. To do that, it is necessary to save and publish the page.

There are two different ways to save and publish pages. Each way depends on your specified role within the CMS.

Content Providers have the ability to save, but not publish, as they must send their completed pages to their designated approver for publishing.

Content Publishers have the ability to both save and publish in addition to approving pages received from Content Providers for publication.

Saving pages within the CMS saves your pages to the staging server. Publishing pages within the CMS publishes your pages to the production server and as such, appears live.
Saving & Publishing as a Content Provider

Content Providers within the CMS do not have the rights to publish directly and instead must send completed pages to their designated approver, who will then review the pages to ensure accuracy before the specified page is published. Saving and Publishing as a Content Provider can be done in a few short steps.

1. After you have finished editing or creating a page, click the Save button.

2. Click the Send to User button.

3. The page is sent to your designated approver. This user should appear first (1). If you wish to send to another user, select the user from the drop-down box. If you wish to edit the subject of the approval request, place your cursor inside the Subject box and type your desired subject (2). Next place your cursor inside the Body box and type your desired message (3). Once you have finished, click the Send button (4).
Saving & Publishing as a Content Publisher

Content Publishers within the CMS have the rights to publish directly and ensure pages they publish are accurate before publishing. Saving and Publishing as a Content Publisher can be done in a few steps.

**Publishing Your Own Pages**

1. Click the **Save** button in the upper left part of the WYSIWYG editor.

2. You will be taken to a screen with a preview of the saved page, with various options:
   - To publish the page immediately, click the **Publish Now** button.
   - To continue editing the page, click the **Edit** button.
   - Some users will have an **Edit Source** button to edit the editable region's raw HTML code (*recommended for advanced users only*).
5. Once you are viewing an unapproved page, you have several options: Publish Now, Schedule, Send to User, Decline & Keep, and Decline & Revert.

- If the page is acceptable and does not need further changes, click Publish Now.
- If you would like to make changes to the page before publishing, click the Edit button, make changes, then save and publish as usual.
- If you wish to schedule the page for future publishing, click the Schedule button.
- To have another Content Publisher review the page, click Send to User.
- If the Content Provider needs to make more changes and resubmit the page for review, click Decline & Keep to send the page back; this will send an email to the Provider and put the page back in his or her Workflow Inbox.
- If the page is completely unacceptable, click the Decline & Revert button to restore the page to its last saved state before the Content Provider began editing it.
Using the Content Manager

The Content Manager in the CMS is the central repository for your site's web pages, images, videos, and other media. Within the Content Manager you can create, delete, rename, or move existing pages, and upload images, videos, and other forms of media for your website.

To get to the Content Manager, click the **Content** tab at the top of the screen.
Creating New Files

Creating new HTML documents is done in the Content area of the CMS. To create a new page:

1. Click the **New Page** button.

2. You will be presented with a selection of templates to choose from; click on the one that best fits the content of the new page.

3. The CMS will ask various questions about the new page:

- **The title of the page as it will appear under the site masthead (1):** This is the name of the page, and will appear at the top left portion of your page below the masthead and campus branding bar. This can contain numbers, letters, special characters, and spaces. The title should be capitalized appropriately.

- **What is the filename of the new page (2):** This is the actual filename; it should be all lower-case and should not contain spaces or special characters. Do not type the file extension; e.g. for a page called Staff, its filename should be entered as staff and the system will create a file called staff.html.

- **Overwrite resulting file if it already exists? (New Page) (3):** This checkbox will allow creating a new page that has the same name as an existing page, replacing that page with a blank one. In general it is best not to use this
option but rather to either rename the old file or choose a different name for the new file.

- **New Page Access (4):** To restrict editing of the new page to a particular person or group of people, choose an option from the pull-down menu. In general it is best to leave this set to Everyone.

- **Section:** Some sites will have different options automatically if a particular section is chosen; if the new page belongs in a particular section, e.g. a faculty member's page might go in the Faculty section, be sure to select the correct option in the pull-down menu.

4. Click the **Create** button to create the new page. This will take you to a preview of the page. Click the **Edit** button to begin editing.

5. Click any of the **green edit buttons** to edit that region.
Working with Folders

Sometimes it is helpful to organize content using folders. To create a new folder:

1. Click the New Folder button at the upper left corner of the Content Manager.

2. Type in the name you wish, then click the Create button. Note that the name must be all lowercase, and may not contain any special characters or spaces. In general, it is best to check all of the checkboxes in the New Folder window.

3. To navigate to the folder, click the folder's name in the Content Manager. Once in the folder you may create new pages or upload files.

Moving Existing Files into a Folder

1. In the Content Manager, check the check box next to the page(s) you wish to move (1) and then click the Move button (2).

2. A mini content list will appear from the left. Scroll down until you find the folder you want to move the page(s) to, and click the Choose link.
Uploading Files
To upload images, text files, Word documents, PDF’s, etc. to your website:

1. In the Content Manager, click the **Upload** button.

![Upload button](image1)

2. Click the **Browse** button and select the file you wish to upload from your computer's file browser (1). Then click the Upload button (2).

![Browse and Upload](image2)

3. If the file name is excessively long or contains special characters or spaces, it is a good idea to give it a shorter name; i.e. a file named April 2008 Proposal.doc could be renamed to april_2008_proposal.doc (it is important to include the file extension in the new file name) To do this, type the new name in the **File** box next to the selected file you wish to upload.

4. If the file already exists on the server but you need to upload an updated version, check the **Overwrite** checkbox. Note that this functionality is available only to Super Editors.

5. Files other than HTML and text files will be uploaded to the Production Server rather than the Staging Server; you will not be able to edit them in the WYSIWYG editor, but you will be able to link to these files from the page editor.
Editing the Navigation

The left navigation bar on sites in the CMS (or "left-nav") is controlled by a text. This file, labeled "menu.txt", controls the navigation for the entire site and resides in the site's root folder. Please note that editing this file is restricted to Super Editors due to its site-wide effects. To menu.txt file can be edited in a few simple steps:

1. Browse to the file named **menu.txt** in the Content Manager and open it for editing in the Content Editor.
2. Add, delete, or change items according to the guidelines below:
   - **Primary menu items** are denoted in the menu.txt file by typing out the title of the page (this is the header of the page), followed by a vertical bar ("|"). Primary menu items may include the optional subtext, which will appear under the title in the final menu, which are followed by another vertical bar. Finally, primary menu items must include the filename of the HTML content page (this is case sensitive).

   Example:
   ![Example of primary menu items]

   The page title is highlighted in red, the address in blue, and the optional subtext in green in the example above.

   - **Secondary menu items** are created in virtually the same way, except for 2 major differences. For secondary menu items, the first character must be a "+" sign, followed by the page title (no space between them). There is no subtext for secondary menu items, so there is simply a vertical bar after the title and the filename of the corresponding page.

   Example:
   ![Example of secondary menu items]

   The page title is highlighted in red above, and the address in blue.

   - **Tertiary menu items** are similar to secondary menu items except that two dashes ("--") must precede the title (no spaces between). After the page title, place a vertical bar followed by the filename. Please note that tertiary menu functionality was created to help with the transition of websites to the new UCR branding. However, they are generally not recommended if they can be avoided.

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Example:

Graduate Programs/grad_programs.html
+ Graduate Applicants/grad_apply.html
-- International Applicants/intl_apply.html
-- Domestic Applicants/jus_apply.html
+ Housing/housing.html
+ Financial Support/financialsupport.html
+ Graduate Advising/gradadv.html

The page title is highlighted in red above, and the address in blue.

3. Save and publish in the same manner as any other web page in the CMS.

**Important Notes on Navigation**

1. **Menu titles must match page titles.** The title you specify in the menu.txt file must match the actual title of the page for the menu system to work correctly. If there is an ampersand or other special character in the page title, it must be denoted using the correct HTML character entity code in the menu.txt file, e.g. an ampersand is denoted by "&amp;".

2. **Special menu widgets.** A special menu widget is available to highlight the "Our People" section of a website, as can be seen at [http://earthscience.ucr.edu](http://earthscience.ucr.edu). To use this widget, there must be a line in menu.txt titled "Our People," which may not have an address or subtext. This item may have any number of secondary menu items. For example:

```
Our People
+ Faculty/faculty.html
+ Postdoctoral Scholars/postdoc.html
+ Graduate Students/gradstudents.html
+ Undergraduate Students/undergrads.html
```

It is also possible to have a "For" section below "Our People" as demonstrated at [http://education.ucr.edu](http://education.ucr.edu). The For section must be formatted like the Our People section; for example:

```
For
+ Current Students/studentinfo.html
+ Future Students/futurestudents.html
+ Alumni/alumni.html
+ The Media/press.html
```
Editing Related Links

The Related Links column appears in the footer at the bottom of the page to the far right. Adding Related Links to a page serve as a way to link the viewer to other relevant pages or external web sites. If Related Links are undefined, they will appear blank or have Link 1, Link 2, and Link 3, as seen below:

![Related Links](image)

To add Related Links to a page, follow these steps:

1. Login to the CMS and browse to the desired page. Once there, click the green edit button above the Related Links section.

![Edit Related Links](image)

2. Place the cursor below Related Links and type the text of your links.

3. Highlight your first link. Move your mouse to the link button and click it once.

4. Type in the link address that corresponds to the link text (1). To link to a page within the site, click the file list icon to the right and select the file from the list. To link to an external web site, type in the full web address (making sure to include http:// before the web address). Optionally, you may change the link behavior by editing the specified fields. Once finished, click the Insert button (2).
Repeat for each link you wish to define.

5. Once you have defined all of your links, highlight them all and click the bullet icon once. This ensures the links are formatted correctly when displayed on the page.

6. Once you have finished, click the Save button.
Expiring a Page

Important Note - Scheduling a page to expire can have site-wide effects. Become aware of the potential impacts and make necessary backups before continuing with expiring a page.

To schedule a page to be expired, click the icon:

Content Expiration allows users to schedule one of three expiration events:
1. Replace the file with another one
2. Redirect a visitor to different content
3. Delete the file

Users that have permission to publish a file can schedule to replace or redirect it. Level 8 or higher users can schedule a file replace, redirect, and deletion.
Replace- Selecting this option will schedule to replace the file with the contents of another. To use this, click the “Choose replacement file...” text and select the replacement file from the resulting file chooser.

Redirect- Selecting this option will schedule the file to redirect all visitors to a different page. The “to” field requires a URL, or other valid absolute path. The second field specifies the delay interval (in text area allows for a message to be displayed until the redirect takes place.

Important Note- Redirect is not available for .PCF files.

Delete- Selecting this option will schedule to delete the file on both production and staging servers. This option is only available to users with permission levels of 8 or higher. Use this option with caution, since deleting files are permanent and cannot be reversed.

To change the scheduling for any file:

To update or cancel pages that have been scheduled to publish or scheduled to expire, click on the scheduled Actions button in the Admin Tab.

A list of files that have been scheduled will appear in which the scheduled task can be changed or cancelled. To complete either action, simply click the icon and either cancel the schedule, or update the schedule as if creating a new schedule.
Advanced Features

Advanced Features of the CMS are features that are available but are not critical to using the CMS. They are meant as additional tools within the CMS designed to make your job of managing and updating pages easier. The following are instructions on how to use a variety of advanced features available to most users of the CMS.
Scheduled Publishing

Scheduled Publishing is a feature within the CMS that allows you to set a date and time a specific page will be published. This is useful if you are doing a series of edits to specific pages but do not wish to publish until you have finished, or to coincide with a pre-determined launch date. To set this up, follow these steps:

1. Login to the CMS and go to the page desired.
2. Complete your edits and hit the **Save** button.
3. After clicking the **Save** button, you will be presented with a toolbar of buttons. Click the **Schedule** button.
4. Click a date on the calendar that corresponds with the day you wish to schedule publication. Successful selection should replace the “Choose a Date” text at the very bottom of the calendar to the date you selected.

**Before Date Selection**

![Before Date Selection](image)

**After Date Selection**

![After Date Selection](image)
5. Select the time by clicking the drop-down menu for hour and selecting the desired hour, and then doing the same with minute increments (:00, :15, :30, or :45).

**Hour**

**Minute**

6. Once you have confirmed the date and time for publication, click the Schedule button at the bottom. When the date and time you have selected occurs, you will receive a notification via the email address registered to your CMS account, as well as your Workflow inbox. To edit the message text, see **optional Step 7**.

7. If you wish to edit the message that is sent to you successful publication, place your cursor inside the Subject box and type your desired subject (1). Next place your cursor inside the Contents box and type your desired message (2). Once you have finished click the Schedule button (3). Optionally, you may check the Send to e-mail? checkbox if you wish to have a copy of the message sent to your e-mail.