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CMS Instructions

http://staging.sitename.06.thirdwaveweb.com/common/admin

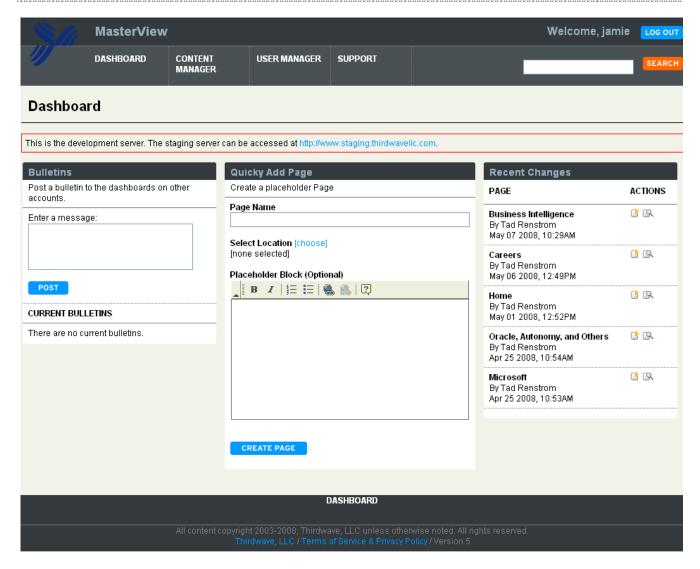
Date:

December 17, 2009

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CMS Dashboard



Upon logging into the CMS, there are three tools for editors; Bulletins, Quicky Add Page, and Recent Changes.

Bulletins

Bulletins can be posted for editors regarding tasks in the CMS or news about the foundation. To add a message to this section, simply type the content into the message field and click Post. Bulletins can be deleted by clicking the red X. To edit one, click on the pencil and paper icon.

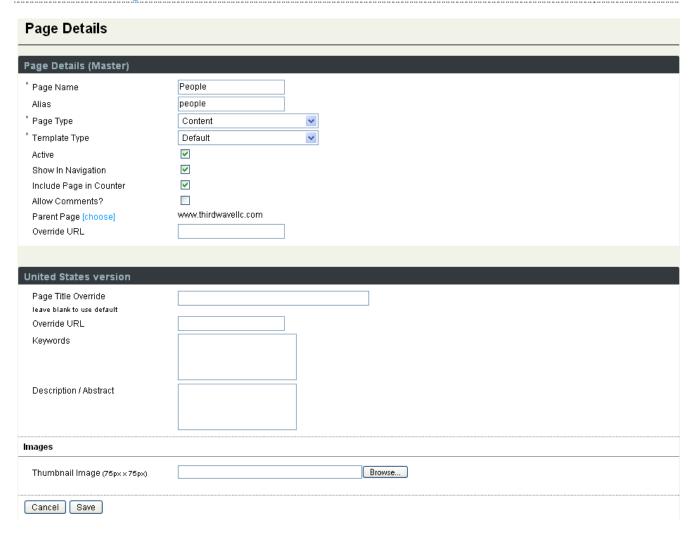
Quicky Add Page

This tool will add a page with content to any section of the site without having to navigate to it in the Content Manager. Enter a Page Name, Select the location of the new page, enter in the content and click Create Page.

Recent Changes

This section displays the five pages that have been edited most recently. You can preview these pages by clicking on the yellow arrow icon or navigate to that page in the CMS by clicking on the magnifying glass icon.

Terms for Page Details



The following correspond to the fields that are available at the page level.

Page Name: This field corresponds to the title of the page. On the front end of the site, the page name displays in the site's navigation as well as in the web browser's title bar.

Alias: The unique name assigned by the system to this page. You can designate your own or the system will automatically create one based on the page name. When creating your own alias, keep length to a minimum and only use letters, numbers and hyphens or underscore characters. The alias appears in the URL of the page: http://www.clientname.org/content.cfm/'alias'

Page Type: There are several different page types in the system. Based on the customization of the CMS, there can be specialized page types. In typical cases, the page type should be kept to the default, which is "Content".

Template Type: This alters the display of the page. Within the Client Name CMS, you will typically use Default. See page 8 for more details.

Active: This field corresponds to the active state of this page and determines if the page is visible on the front end and accessible via its page alias. Pages marked as inactive will be listed in grey in the CMS.

Show in Navigation: This field determines if the page is visible in the site navigation. This page can still be accessible via its page alias if its state is active.

Parent Page: Through this field, this page can be moved to different areas of the site.

Override URL: If a page has an override URL, then any site visitor that accesses this page will be redirected to that URL.

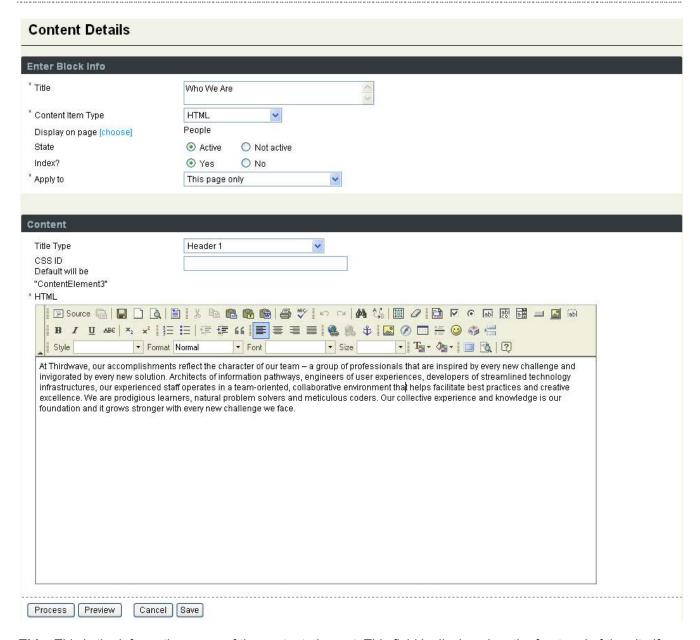
Page Title Override: Content in this field will replace the title of the page in the browser. This is defaulted to use the content from the Page Name field.

CSS Page ID: This field alters the format of the navigation, background color, and other styles within the different sections of the site. If a CSS ID isn't specified for a sub page, its parent page ID is used.

Keywords: This field corresponds to the meta keywords for this page. This field is indexed by both the internal site search and external search engines.

Description / Abstract: This field corresponds to the meta description for this page. This field is indexed by both the internal site search and external search engines.

Terms for Content Details



Title: This is the informative name of the content element. This field is displayed on the front end of the site if the Title Type is not set to the default of "Hidden".

Content Item Type: This drop down box governs what type of content this is. The default is "HTML" but there are a variety of other options. See page 8 for more details.

Display on Page: A content element can be moved to another section/page of the site by using this drop down box. If moved, the content element will be moved to the bottom of the page in the same column.

State: This field corresponds to the visible state of this content element. If set to "Not Active" it will not be visible on the front end of the site.

Index?: This field corresponds to whether or not the content of this element should be included in the internal search engine.

Apply to: This option governs the inheritance behavior of this content element. By default it will only display on the given page, but it can also be set to display on the given page as well as all sub pages.

Title Type: This governs how the title is displayed on the page. By default it is hidden but the styles from Header 1 to Header 6 can also be selected.

CSS ID: Entering a CSS ID in this field will wrap the content in a stylized div (<div id="cssid">). You will not be using this field in the Client Name CMS.

HTML: This area is where the content is managed and is commonly referred to as the WYSIWYG (What You See Is What You Get). Editor tasks are facilitated by a word processor-like interface that allows common and advanced formatting options. Through this interface, images and documents can also be uploaded and linked to.

Process: This button is used in conjunction with the HTML area. Clicking on this button will tell the system to search the HTML area and look for any externally linked documents and images. If any are found, then the system will display a series of file upload prompts so that the user can upload the appropriate file.

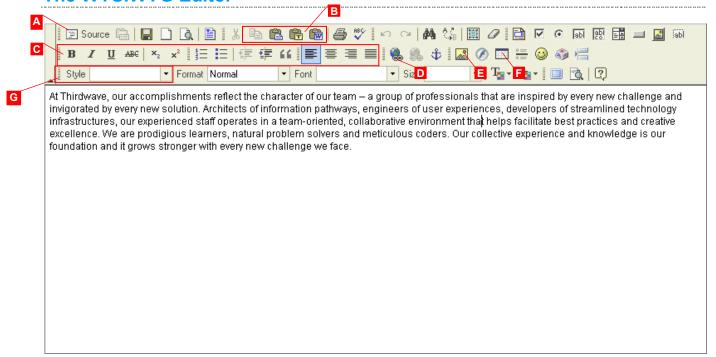
Preview: This button will load the current state of the content into the page temporarily. This is accomplished through a popup window so popup blockers should be disabled.

Cancel: This button will discard any updates and return to the main content manager screen. You can also utilize the browser's Back button for the same purpose.

Save: This button will save the content element to the database. Changes and/or additions will then display on the front-end of the site.

Other fields may be displayed when different content item types are designated. For information on these, please see page 22.

The WYSIWYG Editor



The WYSIWYG Editor (What You See Is What You Get) is an extremely helpful tool that uses a word processor-like interface allowing common and advanced formatting options. To get more details about any of the Editing icons, hover over them and help text will appear.

- A. Source: Toggles back and forth between HTML view and design view
- B. **Copy/Pasting options** (From left to right): Copy (CTRL +C), Paste (CTRL +V), Paste as plain text, Paste from Word. *Paste as plain text removes all formatting from copied text, Paste from Word keeps formatting. We recommend that you do not copy and paste directly from a formatted document into the WYSIWYG. This will create unneccesary HTML and cause inappropriate formatting on the front-end of the site. To avoid this, first copy the text from the document and then select either Paste from Word or Paste as plain text.
- C. **Formatting Options:** Bold, Italic, Underline, Strikethrough, Subscript, Superscript, Numbered List, Bulleted List, Indent, Blockquote, Text Alignment Select the text to be formatted first and then click the appropriate icon to format
- D. Insert link: Select the text to be linked and then click on the icon
- E. Insert image: Place the curser in the content where the image will be placed and then click the icon.
- F. **Insert Table:** Place the curser in the content where the table will be placed, click the icon and fill in the size of the table (rows, columns etc.) in the pop-up.
- G. Style: This drop-down contains specific font styles for your site.

More documentation on this editor can be found here: http://docs.fckeditor.net/FCKeditor 2.x/Users Guide

Page, Template and Content Types

Page Type

A page can operate in different manners depending on its page type. For this site, there are several page types:

- **Content:** This is the default page type and corresponds to basic content pages on the site. You will use this page type the most often.
- **System:** This is typically a non visible page. It is used primarily to house system level pages that have specialized functions. The Search and 404 error pages of the Client Name site are housed here.
- Site: This page type is only used for the top level page and holds information about the production tier for two-tier based sites.

Template Type

A page can also operate in different manners depending on its template type.

- **Default:** This is the default template type and corresponds to the majority of the pages on the site. You will use this template type the most often.
- **Homepage:** This template is only used for the homepage of the site.

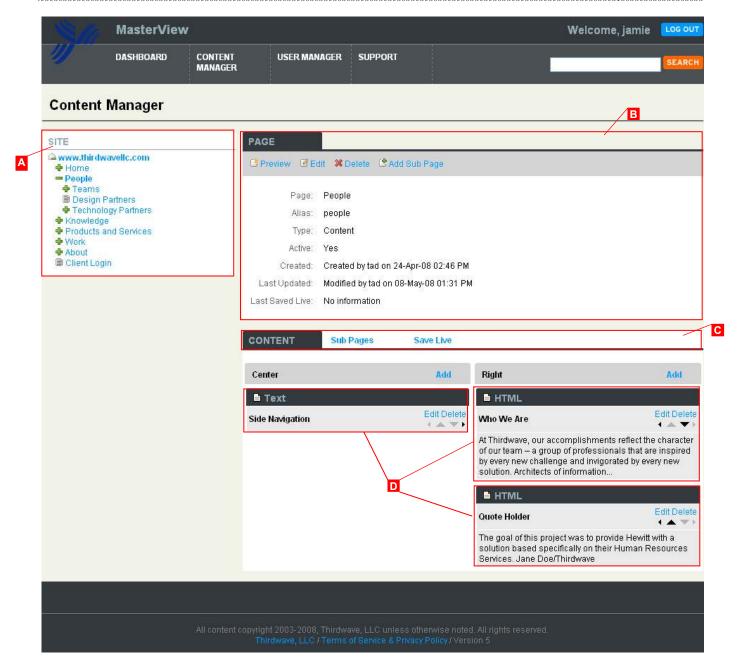
Content Element Type

These are defined behaviors of content elements. Some of the most commonly used content element types include:

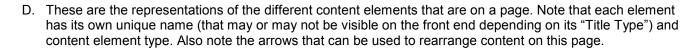
- HTML: Formatted text with images and links. This is the default for typical content. Uses the WYSIWYG
 editor.
- **Text:** Text with little formatting. HTML code is still allowed but not with the benefit of the WYSIWYG editor. Cold Fusion code is also allowed.
- **Templatized Content:** This is a content element type that works in conjunction with the Content Template type. The first step in the use of this type is to select which content template to use. Once selected, the CMS will display the appropriate number of text areas depending on the tokens present in the Content Template.
- Index of Sub Pages: This module will list and link the sub pages of the page that it is placed on. A title type can be designated and you can specify the number of items to display. Leaving this field blank will display all sub pages.
- **Image:** This element is comprised of an image and an optional link.
- Flash: This element has fields for a flash movie, an image and a link. The image is doubly important since the CMS uses the size of the image to generate the correct HTML code for the flash movie as well as displaying the image (and link) in place of the flash movie if a site visitor does not have the flash plug-in.
- **RSS Feed:** Specify a valid RSS URL and the CMS will read the RSS at regular intervals and display its contents within the page layout. The number of items to be displayed is an additional parameter.
- Repeated Content: A content element from another part of the site can be placed in other sections using this content element type. This eliminates the need to reenter the content on every page it appears. A change to the parent content will automatically adjust all of its repeated content throughout the site.
- Content Template: This is a special content element type that allows site administrators to define custom templates that can be used elsewhere in the site. This allows for complex formatted content that has only certain parts editable by site editors. This is an HTML area where special tokens can be placed to indicate where text content should be placed.

For instructions on adding these various content types, see page 22.

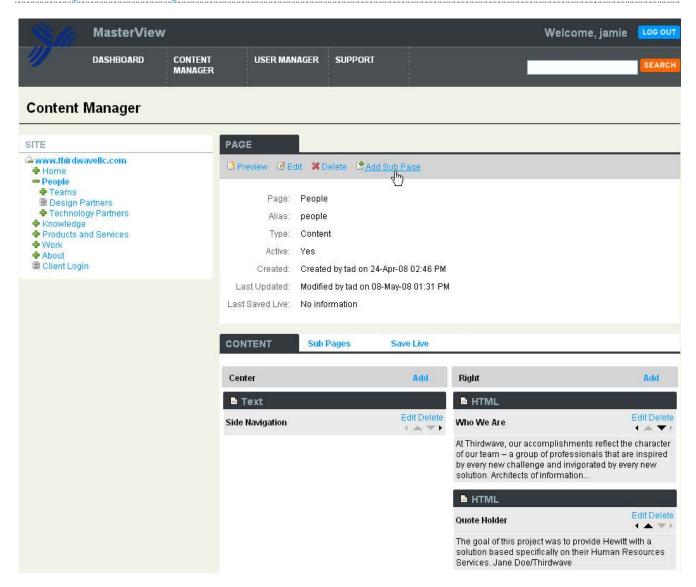
A Typical Content Page in the CMS



- A. The content manager navigation displays all pages in the site. Inactive pages are denoted by grayed out text. Clicking on a page in the navigation will select that page and display its content details. Clicking a plus (+) sign next to a page will expand its listing of sub pages.
- B. This area has general information about the selected page such as its title and alias as well as when it was created and last modified.
- C. These tabs display different views of data that are associated with the selected page. The default tab is the content tab.
 - a. Content: Displays attached content for the page.
 - b. Sub Pages: Displays a list of sub pages for the page. The order and state of each sub page can be manipulated via this tab.
 - c. Save Live: Saves changes to content to the production (live) server.

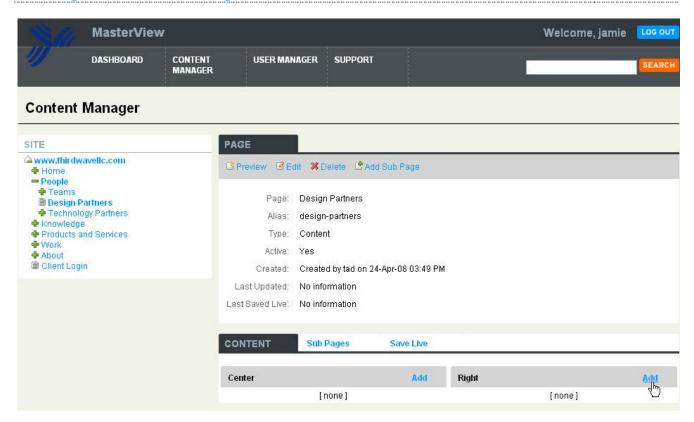


Adding a New Page



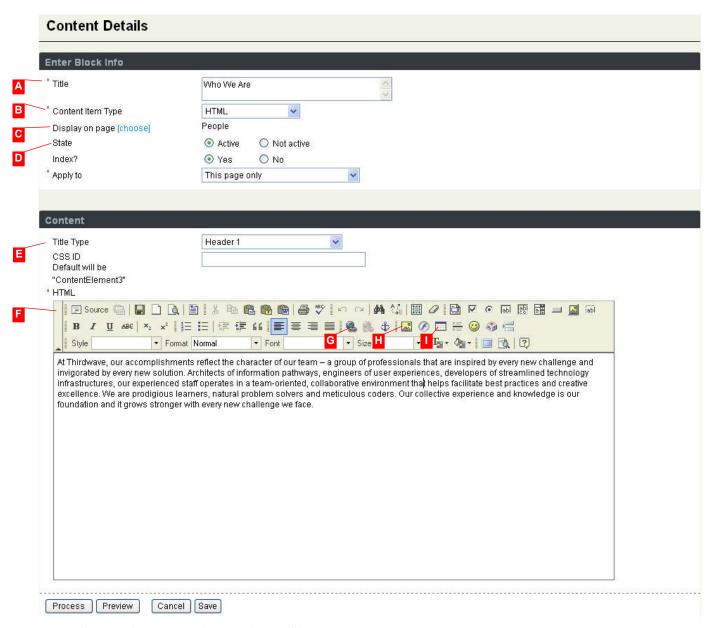
- 1. Navigate to the location in the CMS where the new page will reside. If it will be a top-level page in the navigation, click on the link for www.clientname.com at the top.
- 2. Click Add Sub Page in the Page Details section
- 3. Enter a Page Name
- 4. Select a Template Type this will typically be Default
- 5. Click Save

Adding Content to a Page



- 1. Navigate to the location in the CMS where the new content will reside. Click on the link for the page in the left column listing of pages.
- 2. In the Content tab, Click Add in the column where the content will appear. Main content should be placed in the Right column.
- 3. Enter in the appropriate content on the following screen (more instructions for this step appear on the next page)
- 4. Click Save

Editing Content



- 1. Locate the content that requires editing
- 2. Click Edit next to the content piece
- 3. Depending on the type of content, you can perform the following:
 - a. Edit the Title

This title shows in the CMS content area and at the top of the content on the front end of the site if a header style is chosen from the Title Type drop-down menu. The title also appears in the content tab of the CMS.

- b. Edit the Content Item Type
 - Most will be HTML. When a new type is selected, the page reloads with different options specific to the item type.
- c. Edit where the content will be displayed
- d. Edit the state of the content
 - Active or Not active whether the content will show up on the front end of the site. If inactive, content is hidden from view.

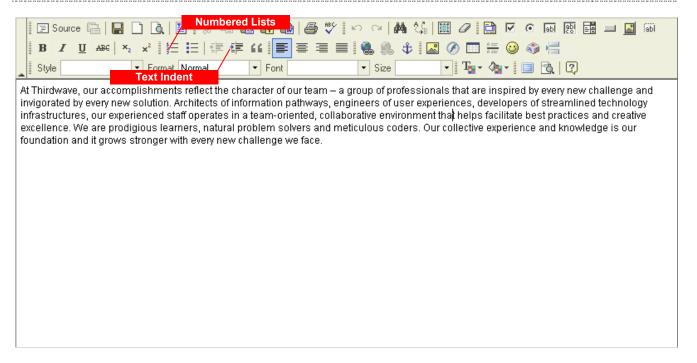
- e. Edit the Title Type (hidden/style)
 If title is hidden, it will not display on the front end of the site. If the title should be displayed, use the drop-down menu to select a specific heading style.
- f. Edit the main content of the page

Hover over icons for details

Copy and paste content (CTRL +C, CTRL +V)

- Paste from Word Icon (keeps formatting). Be sure to check the boxes for 'Ignore Font Face definitions' and 'Remove Styles definitions'.
- Paste as Plain Text Icon (no formatting kept)
- DO NOT paste directly from the document into the text box this keeps all formatting and adds unnecessary html tags altering the style of the content on the front end of the site.
- g. Add links to the content See page 14.
- h. Add images to the content See page 16.
- i. Add a table to the content See page 18.
- 4. Once you have completed all of your edits, click Save.

Creating an Ordered List



- 1. Place the cursor next to the text that will become a list item and click on the Numbered List or Ordered List icon. This will set the first level of the list. Subsequent numbered or bulleted items can be set the same way, or by making a hard return at the end of each line.
- 2. To set the second level of the list (indented), click on the Numbered List or Ordered List icon and then click on the Text Indent Icon
- 3. Repeat step two for setting additional indented levels
- 4. To remove the indent, click on the Decrease Indent icon.

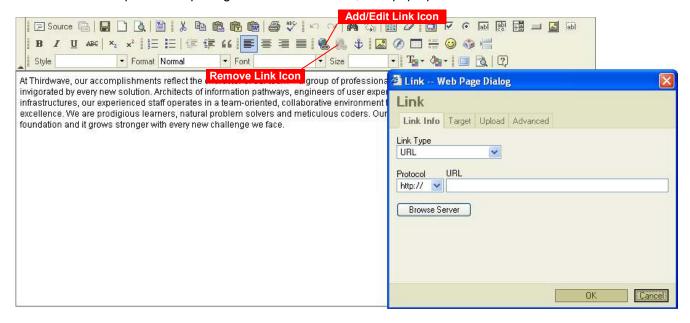
Adding & Editing Links

Link types

- External URL: Select this for external sites, and document links
- Internal URL: Select for URL's within the Client Name site
- Link to Anchor in Text: Select for linking to an anchor on the page (anchor should be added to page first before linking here)
- Email: Select for mailto links to email accounts

Target tab

Provides options for opening link in a new window, as a pop-up etc.



Adding a link to an internal page

- 1. Select the text in the content that will become a link
- 2. Click the Add/Edit Link icon
- 3. Select Internal URL from the Link Type drop-down
- 4. Begin typing the name of the page
- 5. As you type, a list of options will appear, click to select the appropriate one
- 6. Click OK

Adding a link to an external page

- 1. Select the text in the content that will become a link
- 2. Click the Add/Edit Link icon
- 3. Select URL from the Link Type drop-down menu
- 4. Select the appropriate protocol from the drop-down menu most links will be http://
- 5. Enter the appropriate URL
- 6. Click on the target tab and select New Window (_blank) if you'd like the link to open in a new window (recommended)
- 7. Click OK

Adding a link to an Anchor

- 1. First you must create the anchor before linking to it. Place the cursor in the text next to the spot that will become the anchor.
- 2. Click the Insert/Edit Anchor icon
- 3. Enter an anchor name in the pop-up and click OK
- 4. Select the text that will become the link to the anchor
- 5. Click the Add/Edit Link icon
- 6. If the link to the anchor is on the same page as the anchor you've created:
 - a. Select Link to anchor in the text from the Link Type drop-down

- b. Select the anchor you previously created from the Select an Anchor By Anchor Name dropdown menu
- c. Click OK
- 7. If the link to the anchor is on a separate page as the anchor you've created:
 - a. Select URL from the Link Type drop-down menu
 - b. Select <other> from the Protocol drop-down menu
 - c. Enter the following into the URL field: /content.cfm/'alias'#anchorname ex: /content.cfm/grantee-publications#2007_Grantee_Books
 - d. Click OK

Adding a link to an email

- 1. Select the text in the content that will become a link
- 2. Click the Add/Edit Link icon
- 3. Select Email from the Link Type drop-down
- 4. Enter in the appropriate email address
- 5. Enter in a subject and content for the body of the email if desired
- 6. Click OK

Adding Document links

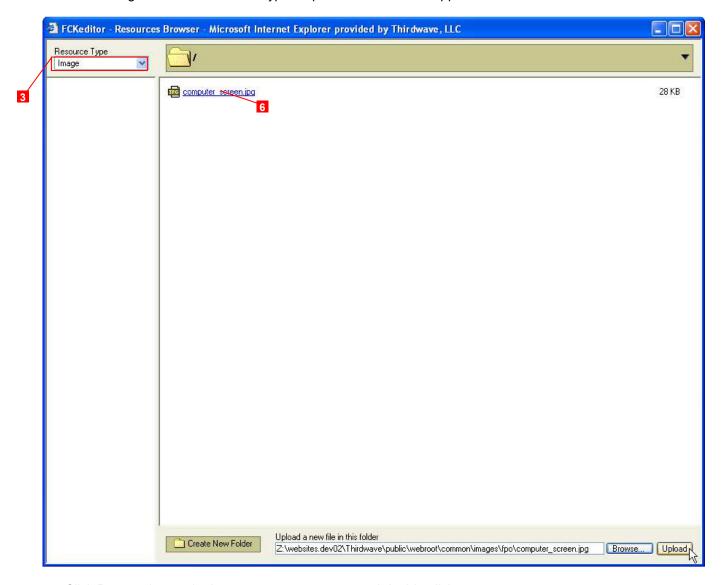
- 1. Ensure that document titles do not have any spaces or odd characters in the file name
- 2. Highlight the text in the content that will become a link
- 3. Click the Add/Edit Link icon
- 4. Click Browse Server
- 5. Click Browse to locate the file on your computer, double-click the name of the file once you locate it.
- 6. Click Upload
- 7. Click on the title of the document you just uploaded
- 8. Click OK

To Remove a Link

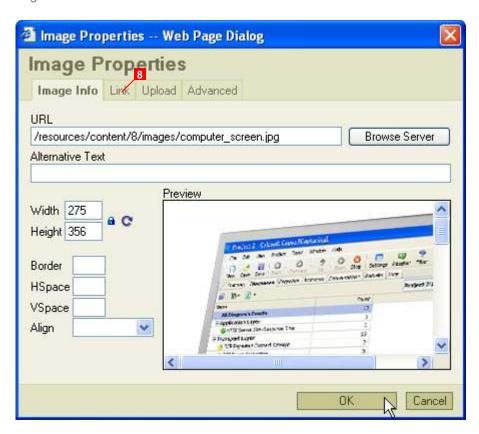
- 1. Place your cursor within the text of the link in the WYSIWYG
- 2. Click the Remove Link icon

Adding Images to Content

- 1. Place cursor in the content where the image will appear and click the Insert/Edit Image icon
- 2. Click Browse Server to locate the image
- 3. Select Image from the Resource Type drop-down menu in the upper left-hand corner of the window

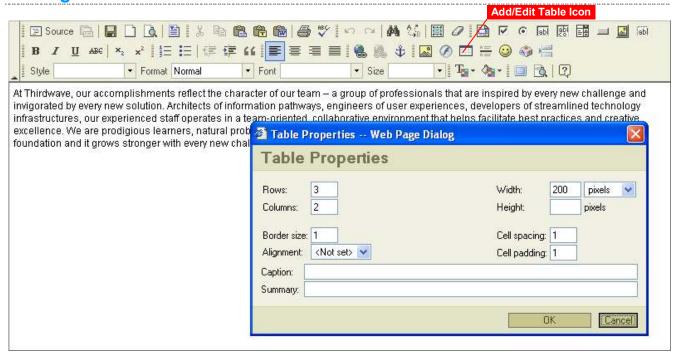


- 4. Click Browse, locate the image on your computer and double-click to open
- 5. Click Upload
- 6. Click on the title/link of the image you just uploaded



- 7. Enter necessary information –Alternative Text, dimensions, spacing, alignment etc. A preview of the image's positioning will appear in the window to the right.
- 8. Use the Link tab if the image will link to another page, website, or document.
- 9. Click OK
- 10. Click Save

Adding a Table



- 1. Place cursor in the content where the table will appear and click the Add/Edit Table icon
- 2. Enter in the properties of the table in the pop-up window and click OK
- 3. Add the appropriate content into the table cells using the WYSIWYG and click Save

Adding Different Types of Content

The 'Text' Content Type

- 1. Select Text from the Content Item Type Drop-down menu
- 2. Enter in the content for the page in the Text field. This field can include HTML and ColdFusion tags.
- 3. Click Save.

The 'Content Template' Content Type

- 1. These content blocks should be created within the system category of the site on a specific page for Content Templates.
- 2. Select Content Template from the Content Item Type Drop-down menu
- 3. Create a layout/template for special content. This will typically consist of several columns of content with specific design elements that will be repeated on pages. Within the separate columns, you'll insert tokens: [[column1]], [[column2]] etc.
- 4. Click Save when edits are complete

The 'Index of Sub Pages' Content Type

- 1. Select Index of Sub Pages from the Content Item Type Drop-down menu
- 2. If you want to limit the number of items that will be listed on this index, enter that number into the Number of Items Field
- 3. Click Save.

The 'Image' Content Type

- 1. Select Image from the Content Item Type Drop-down menu
- 2. If the image will link to anything, add the URL to the Link URL field.
- 3. Click Browse next to the Image field and locate the appropriate image on your computer.
- 4. Click Save.

The 'Flash' Content Type

- 1. Select Flash from the Content Item Type Drop-down menu
- 2. Click Browse next to the Image field and locate the appropriate image on your computer. This image should be a screenshot of the Flash with the same dimensions that the Flash file is. It will be displayed to users who do not have Flash installed on their computer.
- 3. Click Browse next to the Flash field and locate the appropriate SWF file on your computer.
- 4. Click Save.

The 'RSS Feed' Content Type

- 1. Select RSS Feed from the Content Item Type Drop-down menu
- 2. If you want to limit the number of items that will be listed on this index, enter that number into the Number of Items Field
- 3. Enter the URL of the RSS Feed you'd like to display (typically ends in .rss).
- 4. Click Save.

The 'Repeated Content' Content Type

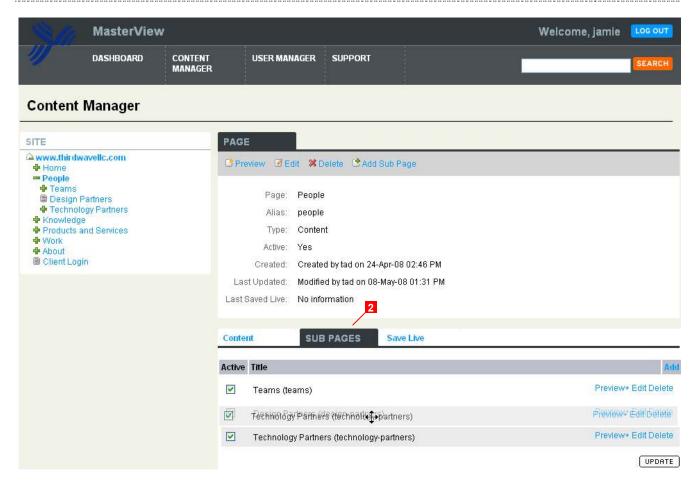
- 1. Select Repeated Content from the Content Item Type Drop-down menu
- 2. Select the source of the content that will be repeated from the Source Content drop-down menu.

- 3. Click Save.
- 4. Once the repeated content has been placed on a page, any edits to the source content will update the repeated content.

The 'Templatized Content' Content Type

- Follow the steps for creating a Content Template first.
 Select Templatized Content from the Content Item Type Drop-down menu
 Enter in your content for each of the different sections of the content template using the WYSIWYG tools displayed on the page.
- 4. Click Save.

Editing Sub Pages



- 1. Navigate to the section where the sub pages that require editing are located
- 2. Click on the Sub Pages tab next to Content
- 3. Place the mouse over the title of a page until the crosshair appears.
- 4. Click and drag the page to the location in the list where it should appear.
- 5. When you have finished adjusting the order of the pages, click Update.

You can also make edits to page details or delete a page using this tab. To do so:

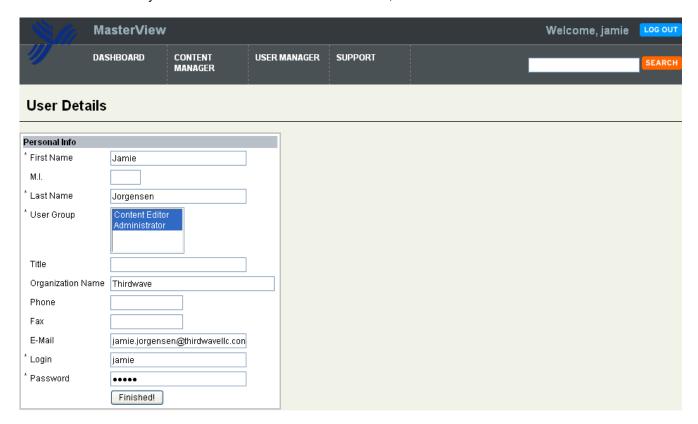
- 1. Click edit next to the appropriate sub page
- 2. Make the appropriate edits (Page Name, Alias, Page Type, Template Type, Active etc.)
- 3. Click Save when edits are complete
- 4. To delete a page, simply click Delete to the left of the page title. You'll get a confirmation screen asking if you really want to delete the page. Click the delete button to confirm.

User Manager

The User Manager allows you to create new editor accounts and search or edit existing ones.

To add a new user:

- 1. Click the Add New User link.
- 2. Fill in the appropriate fields on the following page.
- 3. If the user will only be editing content, select Content Editor from the User Group area. If the user will have the ability to save content live and add new users, select Administrator.



Searching/Editing Users:

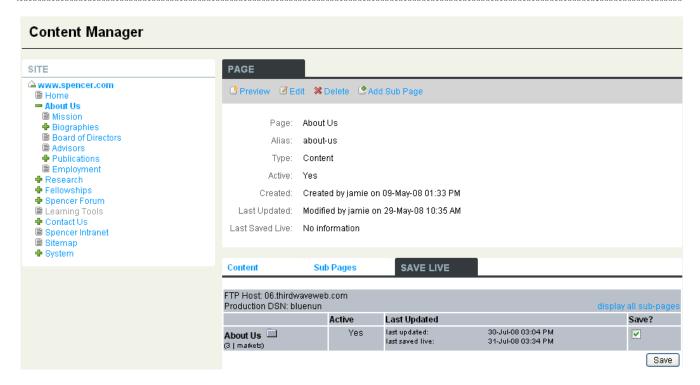
Users within the content management system can be searched by Name, Email Address, Organization and User Type. To see a full listing of all CMS users, leave all of the search fields blank and click Search.

From the search result page, you can edit and Delete users by clicking either the Edit or Delete links in the far right column.

User Types

The title of the various user types can be edited via this tool. New user types can also be added. Adjusting the editing privileges of these user groups is a programming task; please contact Thirdwave for these requests.

Saving Content Live



- Navigate to the page you'd like to save live
- 2. Click on the Save Live tab next to Content and Sub Pages
- 3. Check the Save? box
- 4. Click the Save button
- 5. If you'd like to save multiple pages of a section live, click the display all sub-pages link and then check the appropriate Save? checkboxes for the pages that need to be promoted to the live site. Click Save.