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CMS Guideline

for Year of Engineering

WARNING

This document contains passwords and credentials for critical services. Be careful when sharing.

Table of content

Introduction

The purpose of this document is to facilitate and to help you to manage the CMS that we set up for *Year of Engineering*. As a reminder, the CMS is based on Wagtail, a framework built on Django and made with Python. Wagtail is developed for many years, and it offers many native tools for security and content management.

If you have any additional question about the CMS, please feel free to email us at benjamin@bliss-interactive.com.

Manual

Access

Few words about the environments. There are 3 environments on frontend (for the website itself), linked to 2 distinct CMS, as below:

	Web site	CMS
Staging	yoe.bliss.build/	yoecms.bliss.build/admin/
Testing	yoengineering-website.eu-west-2.elasticbeanstalk.com	yoengineering-content.eu-west-2.elasticbeanstalk.com/
Live	yearofengineering.gov.uk	

> As displayed in the table above, **Testing** and **Live** environments share the same content.

The access page looks like this, for both environments

Sign in to Year of Engineering CMS

Enter your username

Enter password

Forgotten it?

SIGN IN

Login page

USe these logins to connect to the CMS

Staging CMS

Login: `admin`

Password: `YofE2018`

Testing & Live CMS

Login: `admin`

Password: `sent through another channel`

For obvious security reasons, and according to the Security Accreditation, new passwords will be set up after the official release. We'll send them later.

Overview

The CMS allows to add, edit and delete posts in the following pages: News, Events, Videos, Meet the Engineer, Lesson Ideas, CPD, Inspiring Videos and Share your experience. All the static content can not be edited within the CMS and is hard coded in the source code itself (e.g Brand Guideline or Partner Toolkit). Moreover, the CMS allows to manage the

taxonomy related to the content. For instance, the *Events* can be ordered based on filters: Accessibility, Free event, School and Family.

Terminology

To be consistent throughout the document, let's define few terms.

The CMS is divided into "**sections**". There are 14 sections in the CMS, displayed on the left columns. The main one, where you will spend most of the time, is **Pages**. This is the first item on the left column (see pictures below).
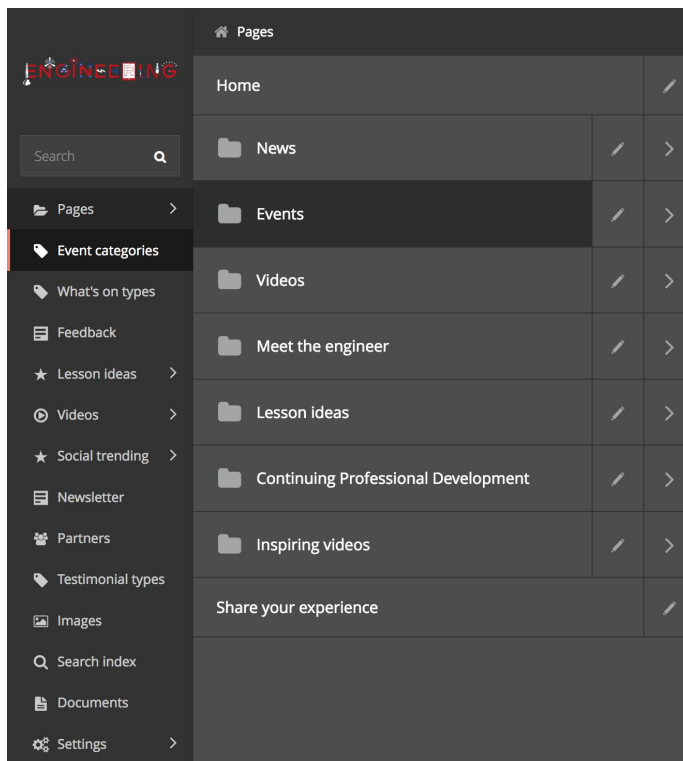Most ot the sections are dedicated to the taxonomies.

I will use the term of "**category**" to designate the overall types of content: News, Events, Videos, Meet the Engineer, Lesson Ideas, CPD, Inspiring Videos and Share your experience. All the categories are displayed in the Page section. Basically**,** it corresponds to the dynamic content of the website.

Each item of these categories will be called "**post**": News' post, Events' post, Lesson Ideas' posts and so on.

Finally, as mentioned previously, some filters allow to display or hide posts. These filters will be named "**Taxonomy**". For example, the **category** Lesson Ideas comprises few taxonomies, such as Type, Activity, Subject and Curriculum.

Create new Posts

Sidebar with all sections

Here is the sidebar.
To add an new post, start selecting the appropriate category by clicking on the **Pages** section on the left column. It will open a sub menu just next to the sidebar.
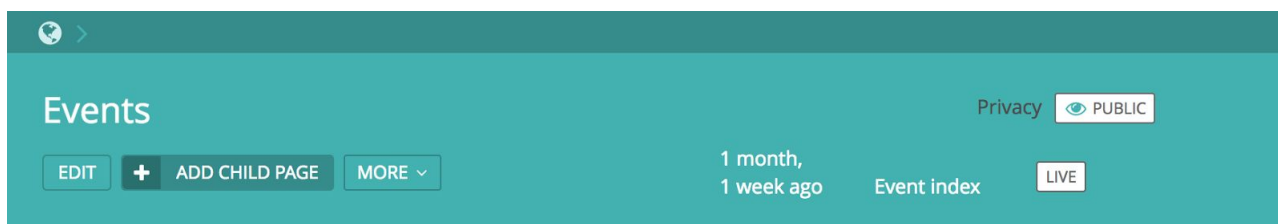
To see all the existing items of any category, simply click on the item – like the darker row "Events" in this example.

What's about the icons on the right? In short, the pencil heads to configuration page of the category itself – any changes on this page can break the proper functioning of the website.
And the arrow will display all the posts of this category on the same column (for a quicker access).

The following image is centered on the content of the page – the left menu is omitted. I took the example of Events; however all the other categories (News, Videos, Meet the engineers etc.) will look similar to this one: each row represents a post.

It's important to consider the last column on the right: if the status of a post is "Draft" or "Draft + Live", the post won't appears on the website. It has to be only "Live". It will be explained later.

Events

Privacy 👁 PUBLIC

EDIT + ADD CHILD PAGE MORE ⌄

1 month,
1 week ago Event index LIVE

⚠ There is no site set up for this location. Pages created here will not be accessible at any URL until a site is associated with this location. Configure a site now.

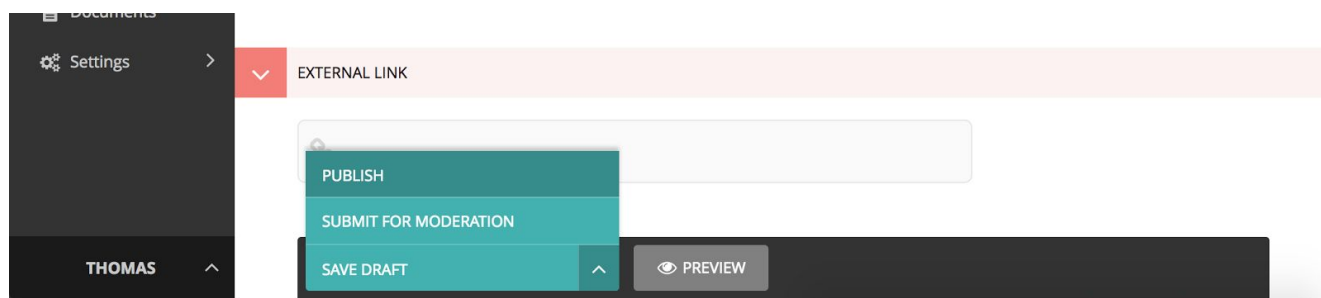| TITLE ⌄	UPDATED ⌃	TYPE ⌄	STATUS ⌄
Careers Hive	2 days, 12 hours ago	Event	LIVE
Engineering Your Future	2 days, 12 hours ago	Event	LIVE
Global Day of the Engineer	1 week, 1 day ago	Event	LIVE
CREST Awards	1 week, 4 days ago	Event	LIVE

Content of the Events category

To add a new post - a new element -, click on ADD CHILD PAGE in the green header

+ ADD CHILD PAGE

Then fill in as many as possible to ensure all the filters, the links and the icons will be displayed properly on the website. We made the labels as close of the labels on the website as possible.

Then, to publish, click on the arrow next to SAVE DRAFT in the footer, and select PUBLISH. The post will be automatically published on the website. If you want to save it for a later release, you can choose SAVE DRAFT or UNPUBLISH.

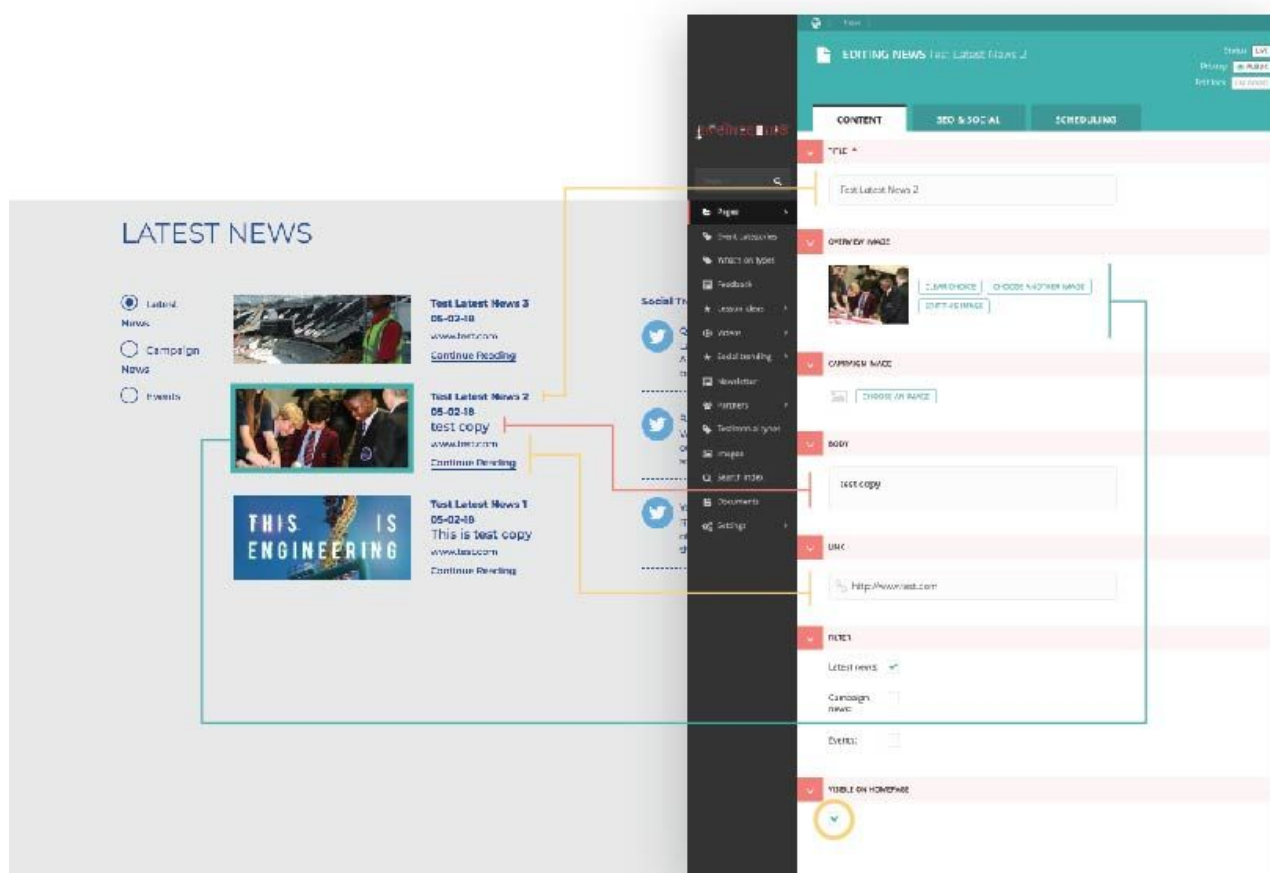*"PUBLISH" the post instead of "SAVE DRAFT"*

The PREVIEW button doesn't work, because we block the drafts in order to prevent any publication mistakes.

For great results, check the results on the website right after publishing, to make sure all the information are displayed properly – and to ensure you didn't forget to fill in one field.

Item on the website are displayed based on their CREATION DATE, and not their MODIFICATION DATE. So be aware of that when if you want to have specific order – especially with the boxes on the home page.
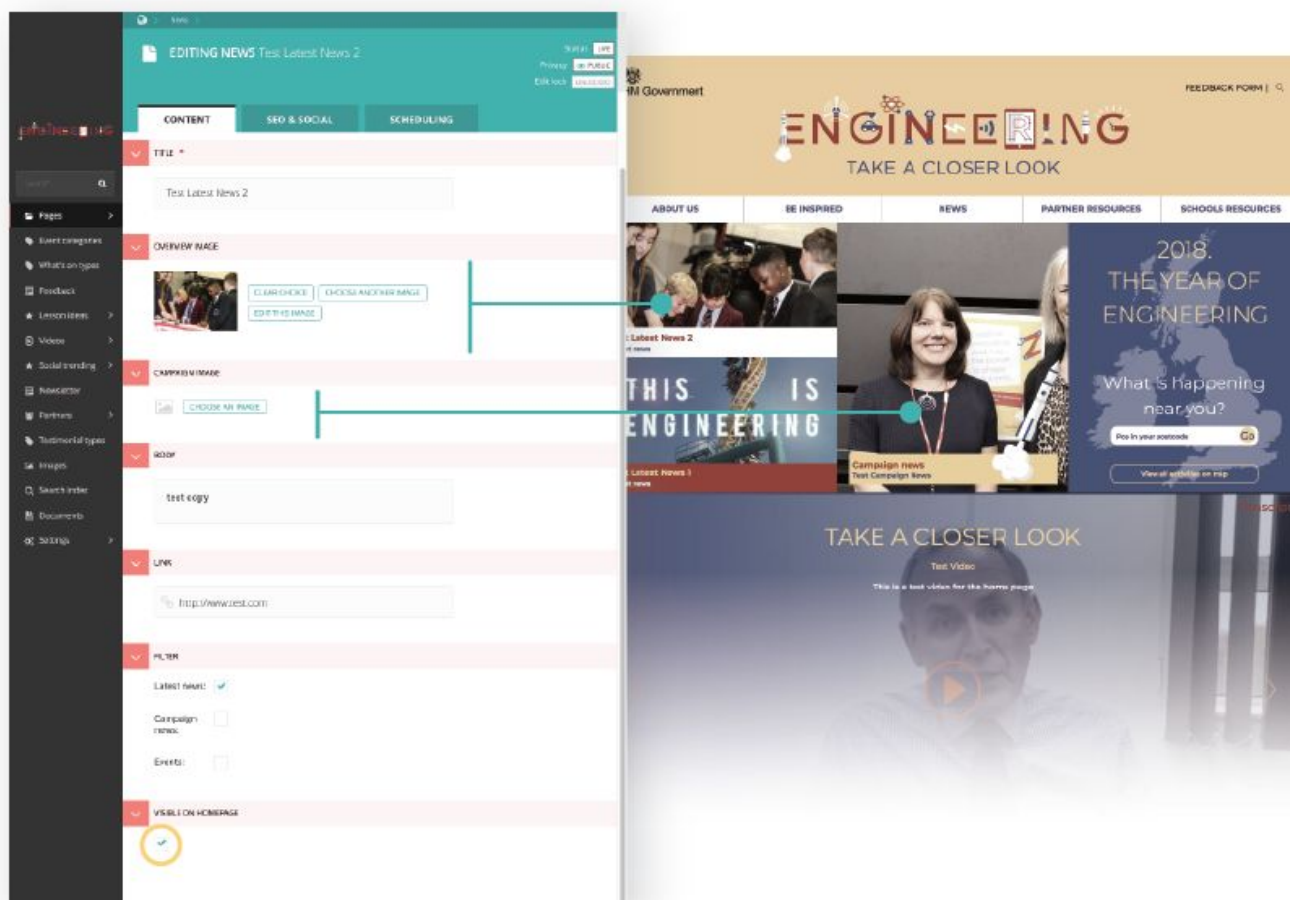
News section

On the next figure, you can see which field is linked to which content on the News page:

For the News section, there is one importants things to highlight.

First, there are 2 image fields. The images are used on 2 pages: Homepage and ews page. The first image field is the default image for the News item on News page. Moreover, this image is also used in the homepage on the box on the top left hand-corner. Please take note that the format is rather horizontal. To display the News item in the homepage, don't forget to tick "Visible on the homepage" and "Latest News".
If you add an image in the second image field **and** you tick the two boxes "Visible on the homepage" and "Campaign News", the news will also appear on the home page, in the middle box. This time, the format is mainly vertical - ensure to provide an appropriate image.

Video section

To add transcripts, there is a dedicated field on the Video Section. To get the transcript, go on the youtube page, click on the 3 dots below the video to expand the menu, and select Open Transcript. Then you can copy the text right into the Transcript field in the CMS

To open the Transcript Panel, click on the 3 dots above "Subscribe" and choose Open Transcript
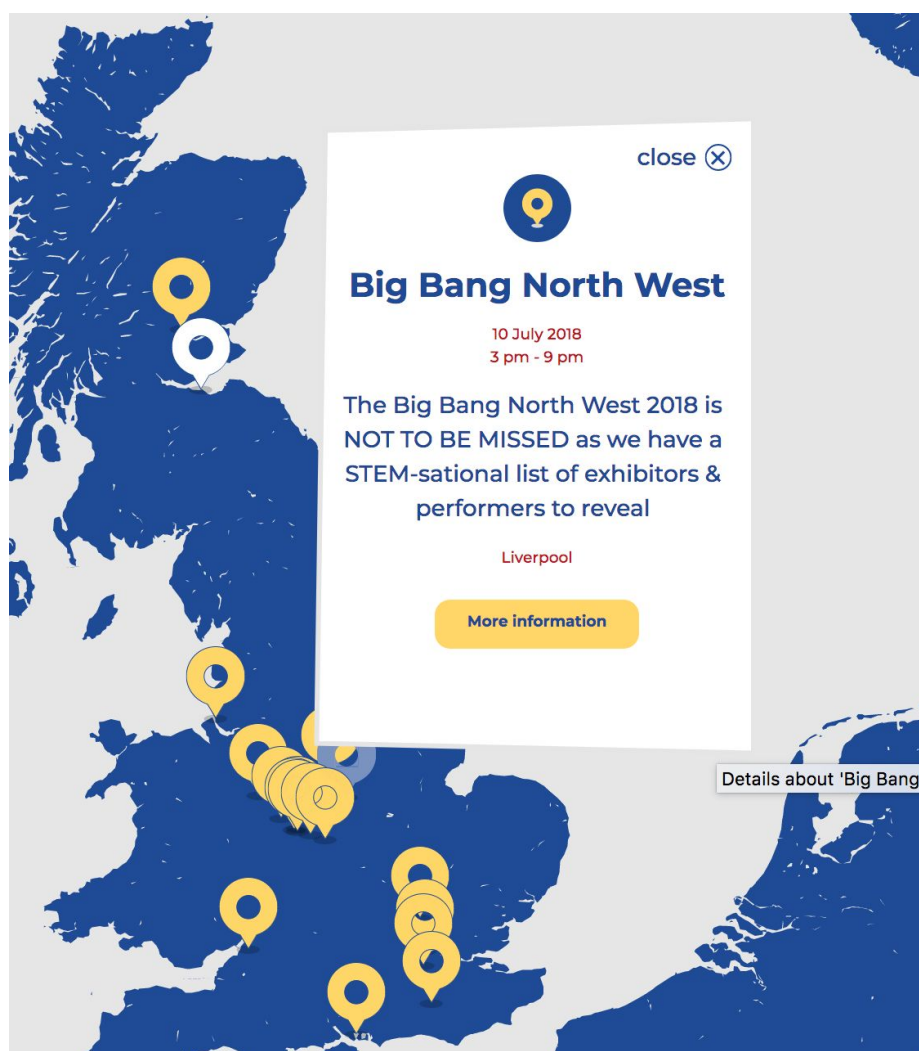

Then you can paste the content onto the CMS.

Warning, for videos without any voices, like *motion design videos* for instance, Youtube cannot generate transcript or captions. You'll have to provide them manually. This video is a good example to figure out the related issue: [Year of Engineering](#).

Events section

Few important things to mention about the Events section.

There are 2 address sub-section in the form: ADDRESS & LOCATION. The first one is displayed (only the locality actually) on the popup of the event. The second location section is used to get the exact coordinates of the event (based on its postal address) to pin the marker on the map. So the second one is mandatory to show up the marker on the map; the second one is not – if the field is empty, the popup won't display any locality name.

In this example, the first address field was filled in, and the locality "Liverpool" is displayed.

Another point about the AGE RANGE. The 2 fields are not required. Here is what you will read on the popup based on MINIMUM and MAXIMUM fields:

MINIMUM and MAXIMUM are empty	The popup doesn't display anything
MINIMUM = 5 MAXIMUM is empty	'5+'
MINIMUM is empty MAXIMUM = 21	'Up to 21'
MINIMUM = 5 MAXIMUM = 21	'From 5 to 21'

Edit Posts

The way to modify existing posts is similar to the one te create new one. Back on any **category** page, click on one item, and it heads to the same page as before, with the fields already filled in with current values. Edit or clear as many fields as needed, and then don't forget to click on PUBLISH

Update Taxonomy

Users can filter events, news, Lesson Ideas and so on by taxonomies. We already set up all the taxonomies according to provided design. Nevertheless, if you want to add, edit or remove taxonomies, you can do it by selecting the one you want on the left column.
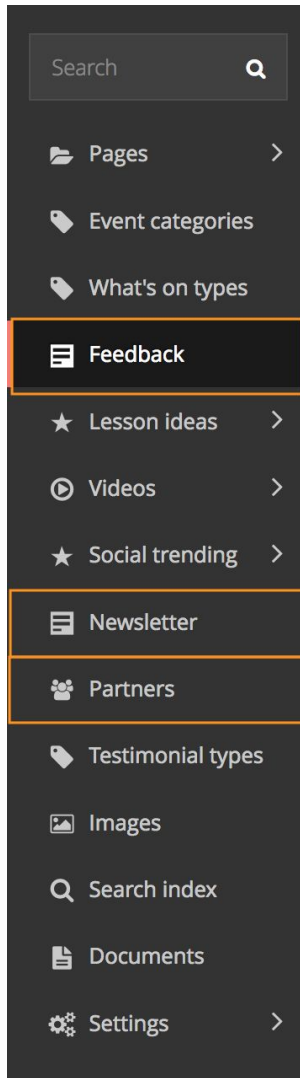
Within the sidebar sections, the taxonomies are:

- Event categories
- What's on type
- Lesson ideas
- Videos
- Social trending
- Testimonial types

Warning: some filters are hard coded, and you won't see any changes on the website if you edit some taxonomy. For example, for What's on, we planned 6 taxonomy items - Partner Campaign, External Campaign, Partner event/activity... with corresponding colors. If you add a new item, it will appear on the legend and on the filter, but no colors will associated to this new item (actually black, the default color).

You can not create new taxonomy - if you want to add new filters for example. It requires a new development.

The user forms

Search

- 📂 Pages >
- 🏷 Event categories
- 🏷 What's on types
- 📄 Feedback
- ★ Lesson ideas >
- ⊙ Videos >
- ★ Social trending >
- 📄 Newsletter
- 👥 Partners
- 🏷 Testimonial types
- 🖼 Images
- 🔍 Search index
- 📄 Documents
- ⚙ Settings >

On YoE, user can fill in 3 different forms: the Partner Registration, the Newsletter and the Feedback Form.

You can consult the filled in forms in the 3 corresponding sections in the left column. For these sections, when clicking on an row, you will be only able to consult the data of course.

The other sections

On the sidebar, you might have noticed there are few other sections. Here is a short description of their purpose:

Images

We ue this section to store assets that are displayed on the website. Actually, the website runs 2 different type of servers (both are Amazon servers): EC2 and S3. The frontend is handled by EC2, whereas the CMS is running on S3 - this kind of server has better performances to send and to render assets. That's why many images used in the website are stored in this section.

Additionally, if you add images in posts, they will be automatically added on this section.

Search index

This part is used to manage the search engine. You don't have to deal with this section.

Documents

It's the same usage as images, but for different kinds of assets, as its name suggests it: PDF and DOCX files mainly. You won't deal with this section, because it needs to bind the documents' URI with the source code.

> Warning:
> If you want to update an existing document - for example the DOCX form for partners who want to add events -, you have to update a document with <u>the exact same name</u> of the existing one. If not, the link will be broken on the website.
> If you are not sure, contact us, we'll take care of it.

Settings

This part is used by the developers. You can only add new users on the platform. If so, please ensure to use strong passwords - to stay consistent with the Security Accreditation Report.

Complementary resources

🔗 [Wagtail](#) – Official website		Link