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web editing MANUAL

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THE COMPLETE GUIDE TO WEB PUBLISHING   
FOR WEB CONTENT EDITORS USING MARLOO CMS

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Adapted from the previous Web Editing Manual in June 2015. Updated periodically.   
Find the newest version of this manual in Marloo CMS by clicking on the “Help” tab at the very top.

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## Logging In

Once you log in, you’ll be taken to the Search page.

#### Is your account locked out?

If you attempt to log in with your email address and you can’t get in, your account might be locked out of Marloo CMS. Accounts get locked out after 3 incorrect login attempts. When this occurs, contact the web team.

### The Search page

**Page ID or URL**Every webpage is assigned a unique ID number upon its creation. This ID number can be found by using the **Get URL** feature in Marloo CMS (see page 17).

More often than not, though, you will probably be searching for a page by its URL. Simply copy the URL of the page you wish to view or edit into the **Page ID or URL** box.

*Example:* Finding the **About** page  
[IMAGE HERE]

**Page Group**  
Every page belongs to a single group. When you’re given access to the CMS, you are given access to groups of the pages you’re assigned to edit.

**Page Title**  
You can search for pages by their title as well. You don’t have to type out the entire title; the search function will find all the pages that contain the words you type into the Page Title textbox.

**Page Information**  
The search function even has the capability of finding pages that contain certain text you type into the Page Information textbox.

#### Recently modified pages

In addition to the standard search criteria, the search page shows the last five pages that you have modified in the CMS.

#### Search results

When you click **Search**, a list of all the pages within your security groups that match the criteria will appear. Click on a page’s title to **view** it, or click **[Edit]** to edit it.

### The top row of links

[IMAGE HERE]

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Browse | Search | Help | Log Out |
| Our web developer regularly updates Marloo CMS to add new site features and fix bugs. | This button will take you to the site’s homepage. You can find your page just as you would when navigating through the site. | This button will take you to the Search page, which you automatically see when you log in. | Click on **Help** to find the latest version of this web editing manual. | Always log out of Marloo CMS before you visit another website or leave your computer. This prevents other people from maliciously hacking into websites using the CMS. |

#### Administrator view

If you are a site administrator, you will see these tabs on the top row of links:

[IMAGE HERE]

|  |  |  |
| --- | --- | --- |
| Management | Debug | Dev View |
| If you are not a developer, this is probably the only tab you will ever need to use. Some of the features include:  Report – Pages Pending Approval allows you to approve pages that others submit for approval.  User Manager (BETA) lets you add or delete users from page security groups directly in the CMS.  There are also reports to view all hidden and deleted pages, as well as user access. | Used to read the configuration file, and to access the **Release** and **Dev** versions of the site in another browser window. | Toggle this button if you want to see the **Dev** version of the site when browsing the CMS or debugging. |

### The Site Tree

The Site Tree is always on the left-hand side of the screen when you log into Marloo CMS. It allows you to see the entire site structure of the website.

**If you don’t have access to some page groups, the pages will be grayed out in the Site Tree.**

You’ll notice that the pages have different icons beside them.

|  |  |  |
| --- | --- | --- |
| [IMAGE HERE] |  | The page is live on the website, meaning visitors can find it. The page in the CMS is fully updated. |
|  | This page is *hidden* and not visible on the website; visitors cannot find it. |
|  | This is a draft page. A web editor has made changes to the page and saved it, but has not submitted the page for approval. |
|  | This page has been submitted for approval by a web editor, and is pending review by a web administrator. |
|  | This page is hidden. Changes have been made to it, but the page has not been submitted for approval. |

#### Context menu

**Right-click on a page in the Site Tree** to access more options for that page.

|  |  |
| --- | --- |
| If you have access to edit the page, the Context Menu will look like this:  [IMAGE HERE] | If you don’t have access to edit the page, the Context Menu will looks like this:  [IMAGE HERE] |

**Edit** allows you to edit the page in Edit Mode.

**View** allows you to view the page. This is helpful if you want to see information on the page without having to load the page in Edit Mode.

**Get URL** allows you to easily retrieve the URL of the page. Learn how to drag the link onto the page you’re editing on page 26.

**Add Sub Page** allows you to either request that a sub-page be added below that page, or (if you have the access) to create a brand-new page beneath that page yourself.

**Expand All** allows you to see all of the sub-pages (including children and grandchildren) in the Site Tree by expanding the tree.

**Delete** allows you to fully delete a page.

**Properties** will allow you to view the page information. If you are a site administrator, you can change some attributes in the **Advanced** tab, including its template, visibility state, security group and owner.

### Logging out

Make sure to log out of Marloo CMS after you are done with your session. This prevents the possibility of others maliciously hacking into the CMS to modify content.

## Adding & Editing Content

Once you’ve double-clicked on a page in the **Site Tree**, or searched for a page and clicked **Edit Page**, you are able to directly edit the main content region of the page you selected.

When you’re editing a page (or even just viewing it), you’ll notice a bar of links at the top:

[IMAGE HERE]

|  |  |
| --- | --- |
| Save | Once you make changes to your page, this button will let you save your page as a draft. Your changes will not be live on the website until you submit the page for approval and it is approved. |
| Delete | This option will let you completely delete a page. A better alternative would be to hide a page. Learn more about hiding on page 56. |
| Add Sub Page | This will let you add a sub-page underneath your current page. If you don’t have access to create a new page, you will be prompted to request permission to do so from the web team via email. |
| Tools | The options include:   * **Get URL** * **Properties** * **Revert to Live Page**   This allows you to revert a page’s content to what is currently live for visitors to see on the website.   * **Quicklink Manager** This feature is no longer widely used across the site. |
| Files | This will let you access the **File Manager**, where all image and document files within an entire page security group are stored. |
| Submit for Approval | This is the button you press once you are done making changes on a page and would like to submit it for approval. |
| Approve | Only site administrators have access to this button. They are able to make changes immediately become live on the website. |

### Editing tabs

You’ll also notice that there are 3 vertical tabs along the left side of the editing window.

|  |  |
| --- | --- |
| [IMAGE HERE] | Edit Mode This is the tab you’re immediately sent to when editing the page. This is where you’ll make content changes.  Preview Mode This tab lets you preview all the changes you make to the page. What you see in Edit Mode may not be as accurate as you what you’ll see in Preview Mode.  Live Web Mode This is what the page currently looks like on the website. If the page is hidden, a *Page Not Found!* error will appear. |

### The TinyMCE editing toolbar

We use a product called TinyMCE to edit pages on the website. TinyMCE provides an editing toolbar that makes editing the website similar to typing in Microsoft Word. Other online software programs like Blackboard and Moodle use TinyMCE, too.

When you double-click on a page in the Site Tree, or search for the page and click the **Edit** link, you’re taken to the **Edit** tab for that page, and you’ll see this toolbar:

[IMAGE HERE]

Many of the icons probably look familiar to you. Here’s what each does:

|  |  |  |
| --- | --- | --- |
| Icon | Property | |
|  | Makes text **bold** | |
|  | Makes text *italicized* | |
|  | ~~Strikes through~~ text; great for letting visitors know that information is no longer correct | |
|  | Aligns text to the left; can also be used to align images, videos and other content to the left as well | |
|  | Aligns text to the center | |
|  | Aligns text to the right; when images are aligned to the right, they float and text wraps around them | |
|  | Justifies text by filling the full width of the container | |
|  | | Changes the look of headings and buttons for more personalization; learn more about the Styles dropdown menu on page 59 |
|  | | Changes default paragraphs to headings; learn more about the Formats dropdown menu on page 23 |
|  | Inserts and edits embedded media; learn more about embedding media on page 49 | |
|  | Spell-checks information on the page using the browser’s built-in spell-check feature | |
|  | Creates a bulleted list; always use to create lists of information because doing so complies with accessibility standards; learn more about creating lists on page 30 | |
|  | Creates a numbered list; always use to create lists of ordered information because doing so complies with accessibility standards; learn more about creating lists on page 30 | |
|  | Move text’s margin to the left, often used to remove bulleted lists and to erase indents in text | |
|  | Moves text’s margin to the right to indent text | |
|  | Undo; reverts single changes to the page; can also be accomplished by pressing Ctrl+X (Windows) or Cmd+X (Mac) | |
|  | Redo; re-makes the changes that were undone using Undo; can also be accomplished by pressing Ctrl+Y (Windows) or Cmd+Y (Mac) | |
|  | Insert and edit hyperlinks; learn more about this icon on page 25 | |
|  | Removes hyperlinks; learn more about this icon on page 25 | |
|  | Creates anchors, which you can use link to other portions of the same page; learn more about creating anchor links on page 27 | |
|  | Inserts and edits images; learn more about uploading images on page 42 | |
|  | Cleans up messy code; this icon is deprecated and no longer has any function | |
|  | Help feature; brings up a dialog box about TinyMCE | |
|  | Allows you to directly edit the HTML code that makes up your page content; was used to change button classes before the Styles dropdown menu was enhanced; learn more about basic HTML concepts on page 63 | |
|  | Paste from Word; use this button when you are copying and pasting content from other documents; instructions can be found on page 51 | |
|  | Creates a horizontal rule, to divide content on a page | |
|  | Remove Formatting; use this button to remove any wonky line-spacing or font size issues in your content; learn more on page 24 | |
|  | Show/hide Guidelines; toggle this icon to see table gridlines | |
|  | Subscript | |
|  | Superscript | |
|  | Inserts special characters, including ©, ™, and math symbols | |
|  | Inserts and edits table; when shaded, this icon will allow you to edit the table you have placed your cursor in; see page 31 to create and edit tables | |
|  | When editing a table, allows you to change the properties of a table row; learn more about this icon on page 33 | |
|  | When editing a table, allows you to change the properties of a table cell or column, or entire table; learn more on page 33 | |
|  | When editing a table, inserts a row above the selected row; learn more on page 32 | |
|  | When editing a table, inserts a row below the selected row; learn more on page 32 | |
|  | When editing a table, deletes the selected row; learn more on page 32 | |
|  | When editing a table, inserts a column before the selected column; learn more on page 32 | |
|  | When editing a table, inserts a column after the selected table; learn more on page 32 | |
|  | When editing a table, deleted the selected column; learn more on page 32 | |
|  | When editing a table, this icon splits table cells that have been merged; learn more on page 32 | |
|  | When editing a table, this icon merges table cells together; learn more on page 32 | |

### Headings

Use these to create titles and organize your content.

1. Type out your title text.

[IMAGE HERE]

1. Click somewhere inside the text.

[IMAGE HERE]

1. In the **Formats** menu, select the Heading from the list.

[IMAGE HERE]

Your text will become a heading, like so:

[IMAGE HERE]

**Want to change the color of the heading?** Go to page 60!

#### Good Practice

* **Make the first heading on your page a Heading 2.**

To comply with accessibility standards, always make your first heading a Heading 2. (The page title is a Heading 1.) The subsequent headings should be a Heading 3, then Heading 4, and so on. You can have as many headings as you like.

* **Try not to insert links inside headings.**

It’s best to emphasize a link by making it a button instead. This is because a heading is meant to serve only as a title of the content that comes right after the heading on the same page.

#### Wonky Heading Issues

Sometimes, you’ll try to change headings into paragraphs or paragraphs into headings, and something like this will happen:

[IMAGE HERE]

The size of the font increases, but the text is actually still a paragraph or a smaller heading.

When this happens, highlight the selected text:

[IMAGE HERE]

Then click the icon, which clears the wonky formatting.

### Links

Make sure that links you create on the website are descriptive. So, instead of creating a link that simply says “Click here,” create one that says, “Click to see the full schedule” or “Click to learn more about our company.” This helps boost our website’s searching ranking on Google and makes our site easier for visitors with screen readers to navigate.

To insert a hyperlink, do the following:

1. Type out your link text:
2. Highlight your link text.
3. Click the **Insert/Edit Link** icon (which looks like a chain link).
4. A dialog box appears. Fill it out as follows:

|  |  |
| --- | --- |
|  | * Link URL: Paste the URL here. * Target: Skip this unless you’re linking to another site or to a document; in those cases, select ‘Open Link in a New Window.’ * Title: Optional. * Class: Skip this. |

1. Hit Insert.
2. Test your link. This is a very important step. Make sure you’ve linked to the right page.

**Want to make this link look like a button?** Go to page 61!

#### Linking to an email address

If you simply type an email address into the **Link URL** text box in the **Insert/Edit Link** dialog box, site visitors who click on the link will get a *Page Not Found!* error. In order to properly link to an email, in which case the visitors are able to easily send an email to that email address, do the following:

In the **Link URL** text box, type in mailto: before the email address.

#### Linking to a page on the same website

To link to another page on the website, you can always just open a new tab and browse to it, then copy the URL and paste it in the **Insert/Edit Link** dialog box.

There’s a cooler, more convenient way to do this, though:

1. Find the page in the Site Tree on the left.
2. Right-click on the page title.
3. Click on **Get URL**.
4. Simply copy this link. Or you can actually press down on the link and *drag* it into the page you’re editing!

#### Linking to an uploaded file

Go to page 38 to learn more about uploading PDFs and other documents, as well as how to add links to them.

#### Updating links

1. Click somewhere inside the link.
2. Click the **Insert/Edit Link** icon. (It will be shaded.)
3. Change the URL or other information, then click **Insert.**

#### Removing links

1. Click anywhere inside the link.
2. Click the **Delete Link** icon (which looks like a broken chain link).

#### Anchor links

You can use anchor links to take visitors to another area on the *same* web page. These are most often used to create Back to Top links and alphabetized lists. They’re extremely helpful if you have a lot of content on one page.

Anchor links are often added at the top of the page, and they take visitors to specified content that’s further down on that page.

**Creating the Anchor**

The anchor is added to the heading of the content you’re taking visitors to.

1. In Edit Mode, highlight the heading of that section of content.
2. Click on the anchor icon on the editing toolbar.
3. Type in a unique one-word name for the anchor. **Do not use spaces.**
4. After you insert the anchor, you’ll see an anchor symbol in front of your heading text.

**Creating the Link**

1. At the top of your page, type out the text of the link.
2. Create the link as you normally would. To make the link point to the anchor, add this in the **Link URL** text box:

To link to the anchor, type **#** followed by **the name of your anchor**.

**Like the look of these buttons?** Learn how to create your own buttons on page 61!

### Lists

Organize your information into either bulleted or numbered lists.

#### Lists within lists

To create nested lists, use the indent icons (located right next to the list icons).

### Tables

Create tables to organize content.

PRO TIP:

You might have tried using the TAB key to move from one table cell to another, only to find that it doesn’t work.

The best way to move from one table cell to another is by using the ARROW keys on your keyboard.

Now that the website is responsive, here are a few things to keep in mind when making tables:

* Have no more than 4 columns.
* Resize the window when in Preview mode to check what the page looks like on mobile displays.
* Extremely long words or hyperlinks might not wrap properly on mobile screens.

**What does it mean to have a responsive website?** Turn to page 8.

To create a table, click on the icon. This dialog box will appear:

|  |  |
| --- | --- |
|  | Cell Padding: distance between the contents of a cell and its edge (in pixels)  Cell Spacing: distance between cells (in pixels)  Border: border around the table (in pixels)  Class: add themes to your table (see page 62)  Table Caption: provide a short heading for the table |

If you click **Insert** without making any changes in the dialog box, a 2x2 table will appear in the editing region of the page.

#### Adding rows and columns

1. Select one of the table cells by clicking inside it.
2. Then click on the **Insert Column After** button.
3. Voila!

#### Deleting rows and columns

1. Click in the column you would like to remove.
2. Click the **Delete Column** icon.

For rows, it’s the same concept, but you’ll use the **Delete Row** icon instead.

#### Merging and splitting cells

**Merging cells**

1. Highlight the two or more cells.
2. Click on the **Merge Table Cells** icon.

**Splitting cells**

This feature is necessary if you want to split cells that have been merged.

1. Click on the merged cell.
2. Click on the **Split Merged Table Cells** icon.

#### Table cell properties

The **Table Cell Properties** icon lets you customize a table cell (or even all cells in a row, column, or entire table) in really cool ways!

For example, you can change:

* the vertical and horizontal alignment of text
* the border
* the width and height

#### Table row properties

The **Table Row Properties** icon will let you do similar things, but the properties get applied to rows instead of cells. This feature will even let you apply settings to only certain rows, like odd or even ones.

#### Table themes

There may be built-in themes that you can apply to your tables. They are called *classes.* If they’re available, you’ll find these options in the **Class** dropdown menu.

You can find the theme options for an entire table by clicking on the **Insert/Edit Table** icon:

Similarly, you can apply themes to table rows by clicking on the **Table Row Properties** icon:

Here are examples of the following table classes:

#### Alternating gray rows

|  |  |
| --- | --- |
| In Edit Mode: | In Preview Mode: |

#### Alternating gray columns

This one also has a purple header.

|  |  |
| --- | --- |
| In Edit Mode: | In Preview Mode: |
|  |  |

#### Small photos in each cell

These are often used at the bottom of pages to help visitors find pages with related info.

|  |
| --- |
| In Edit Mode:  In Preview Mode: |

#### Photos on the left, text on the right

Used to help tables with photos render nicely on mobile devices.

|  |  |
| --- | --- |
| In Edit Mode: | In Preview Mode: |

#### Fast Facts

|  |  |
| --- | --- |
| In Edit Mode: | In Preview Mode: |

### File Manager

The File Manager is the interface used to manage the files that web editors upload to the website. When you upload a file, it is saved in your page’s security group folder.

To get to the File Manager when you’re in Edit Mode, click on the **Files** button at the top of the web page (see page 18).

Directory Box

Upload File Box

Page Security Group

#### Creating folders

Folders are nifty ways to organize files. For instance, you can make a folder that all of the images in your security group can be stored in.

1. In the **New File/Directory** text box at the top right of the File Manager, type in the name of the new folder.
2. Then click the **Create Directory** button.
3. The folder will appear in the list of current files.

**Moving files into folders**

1. In the File Manager, find your file among those listed.
2. All the way to the right of its title, click on the **move/copy** link and select the folder in the dropdown menu that comes up.

#### Supported file types

The File Manager will only accept the following file types. We recommend that you use PDF, JPG, and GIF files because they can be viewed by all visitors, not just those who have Microsoft Office or advanced photo editing software.

|  |  |
| --- | --- |
| Adobe PDF | PDF |
| Word Document | DOC, DOCX |
| Spreadsheet File | XLS |
| PowerPoint File | PPT, PPTX |
| Image | JPG, GIF, PNG |
| Compressed ZIP Folder | ZIP |

It is strongly recommended that any Microsoft Office document uploaded to the web be converted into a PDF before uploading. This is because a PDF, once downloaded by the user, cannot be fundamentally changed. PDF documents can also be easily viewed and printed online.

#### Naming files

When naming files, Marloo CMS requires that these rules be followed:

PRO TIP:

**Keep your page group’s File Manager organized.** You can accomplish this by adding folders (such as a specific folder for images), deleting files that you know are outdated and not linked anywhere on the site, and being very specific when naming new files.

1. **Do not use spaces.** Use dashes ( - ) instead.
2. **Be descriptive.** Avoid names like picture1 or IMG00099397.
3. **Do not use dates or version numbers** in the file name unless previous versions *need* to be retained on the web.

By default, if a file is uploaded with the same name as a previously uploaded file, it will replace the previous file.

### PDFs and other documents

Say that you need to upload a PDF, perhaps for next semester’s course schedule.   
Here’s how to do it:

1. The process is very similar to adding regular links. Type out the text for the link and highlight it.

**If this file is a PDF or other type of downloadable document:**Type (PDF) or (DOCX) or whatever the filetype is, inside or after the link text.

1. Click on the hyperlink icon and the **Insert / Edit Link** dialog box appears.
2. Click on the **Browse** icon next to the **Link URL** text box.

PRO TIP:

While documents can be very useful, visitors might find it irritating to have to click on a link to get content that could have been typed up on the web page. Only upload documents when it *enhances* the page content.

1. The next window that pops up is the **File Manager** for your entire security group, so you will see files that are shared among all the pages that belong to your group. See page 38 to learn more about the File Manager.
2. Click on **Choose File** and navigate through the files on your computer to select the one you want to upload.
3. Click **Upload** to upload the file onto the web server.
4. The file will now appear in the list of files at the bottom of the **File Manager** window. You may have to scroll to find it because the files are listed in alphabetical order.
5. Click on the name of the file.
6. Set the **Target** to **Open Link in a New Window**. Then click **Insert** to create the link.

### Images

Graphics and photos are great ways to add more interest to the content on your page.

#### To insert an image:

1. Put your cursor where you want the image to show up on your page.
2. Insert an image by using the **Insert/Edit Image**  icon on the editing toolbar.
3. Click the **Browse** button.
4. Locate the file in the File Manager.
5. Type an image description. You **must** do this to meet web accessibility standards.

|  |  |
| --- | --- |
|  | Other options:  Alignment: Right, left. (see page 46)  Dimensions: Automatically detected; measured in pixels.  Recommendations:  For headshots: 100-200  For large images: 800  Border: Set a border on an image; measured in pixels.  Space: Creates space on sides of the image. (No need to change; adjusted on the actual site design.) |

1. Click **Insert.** The photo will show up in the editing region.

#### Uploading images to the File Manager

If your photo is **over 2000 pixels wide or larger than 7MB**, please resize your image before inserting it in the editing region. If you do not have access to photo editing software, you can resize the image in Marloo CMS. See how on page 45!

1. Follow **steps 1-3** on inserting an image, which is in the previous section.
2. The **File Manager** window will appear.
3. Click on **Choose File** and navigate through the files on your computer to select the image you want to upload.
4. Click **Upload** to upload the file onto the web server.
5. The image will now appear in the list of files at the bottom of the **File Manager** window. You may have to scroll to find it because the files are listed in alphabetical order.
6. Click on the name of the image. Then follow the rest of the steps in the previous section on inserting images.

#### Resizing images

If your photo is **over 2000 pixels wide or larger than 7MB**, it’s a good idea to reduce the size of the image file. That way, visitors will not have to wait as long for the images to load in their browsers. If you don’t have access to photo editing software, here’s how to do it in the CMS!

1. Make sure the picture to be resized is already uploaded by following the steps on how to upload an image file on page 44.
2. Open the File Manager.
3. Find the picture you want to resize and click **manipulate**, all the way on the right.  
   *Note: GIF files cannot be resized.*
4. Resize the photo using one of the **Scale image** options, as shown below:

|  |  |
| --- | --- |
|  | Horizontal images:  Resize the width to 800 pixels or less.  Vertical images:  Resize the height to 800 pixels or less. |

1. Click **Commit Changes**.
2. Click **Return to Directory Listing.**
3. The picture has been resized! You can now click on the image again to insert it and follow the rest of the steps for inserting an image.

#### Aligning images

By default, all images are left-aligned after they are inserted.

To change the alignment:

1. Click on the image in the editing region. The **Insert/Edit Image** icon will be shaded.
2. Click on one of the first three alignment icons on the TinyMCE toolbar.

**Left:** Align to the left so text wraps around it

**Right:** Align to the right

**Center:** Align in the center

#### Image links

You can add links to images so that visitors can click on them to visit other web pages or sites. Here’s how:

1. Click on the image you want to use. Notice that the **Insert/Edit Image** icon is shaded.
2. Click on the **Insert/Edit Link** icon and follow the normal steps for adding a link.

### Videos and widgets

You can embed content from other websites onto our own website. This is a great way to add videos using a service like YouTube or Vimeo. You can also embed Twitter feeds and other cool widgets by following the same steps in the CMS.

**The following steps will walk you through embedding the content after it is already uploaded and available on another website.** Before following the steps, upload videos to either YouTube or Vimeo.

#### Copy the embed code

Find the embed code of the video or widget you want to embed.

|  |  |
| --- | --- |
| 1. Find the video’s page on YouTube. 2. Click on the Share button. 3. Click on the option to Embed. 4. Then copy the code in the text box as seen on the right. |  |

#### Paste the embed code in the CMS

1. When you’re in Edit Mode, place your cursor where you want the new content to go on your page.
2. Click on the **Insert/Edit Embedded Media** icon.
3. A dialog box appears. Go to the **Source** tab.
4. Paste your embed code in that large text box.
5. Go back to the **General** tab to make sure that the code was processed correctly. If it doesn’t look like the video has loaded in the **General** tab, repeat steps 3 and 4 again.
6. Then click **Insert**.

You can also resize the width and height of the embedded content in the **General** tab. Don’t worry; on smaller screens like mobile displays, the width will not exceed the width of the page, so you can make the embedded content as big as you like. It will shrink if it needs to respond to a smaller screen size.

### Pasting from Word

The icon allows you to paste content from a Word document into the CMS without bringing in non-standard formatting. Headings, tables and bullets from Word are converted to their web equivalents.

If you directly paste content from Word into the editing region without using Paste from Word, special characters like brackets and slashes may be imported as well. Paste from Word prevents this occurrence.

### Mobile-friendly guidelines

If someone visits the site from a mobile device, the website will change its proportions so that the visitor will see the mobile-friendly version, and be able to find all the information without pinching and zooming.

**This presents a challenge to web editors:** making sure that content looks as great on mobile devices as it does on standard desktop screens.

In Marloo CMS, there is a way to resize the viewing window so that you can see how pages will look on smaller screens.

1. While you’re editing your page, go to Preview Mode by clicking on the **Preview** tab.
2. The next step is a little tricky. What you’re going to do is, you’re going to move your mouse so that **it’s hovering between the Site Tree and the editing region.**

Your mouse cursor will transform into this little guy, known as the column resize cursor state:

1. Hold down and drag the Site Tree to the left or right, to change the width of the editing window. If you move it far enough to the right, you’ll see the page as it will look on mobile screens:

It’s good practice to always **check how your page looks on different screen sizes** before you submit it for approval.

#### Common reasons why pages break on smaller screens

* **A table is too large.**

It’s best to have no more than 4 columns in your table. If a table is too large, it will overflow the width of mobile screens. The result:

|  |  |
| --- | --- |
| *Looks great on a desktop computer* | *Overflows the page on a cell phone* |

* **A word is too long.**

Some words might be so long that they overflow the width of the screen on mobile devices, particularly if the words are in tables or links.

Fixes: hyphenate, abbreviate, or replace the word

* **Links are too long.**

Rarely, link text will be really long and the browser will not wrap them onto the next line. Fixes: take out unnecessary words from the link text.

* **Whitespace is used for laying out content.**

It used to be fine to use the spacebar to tweak content positions, because the width of the content container was the same on all screens. Now that the site is responsive, this can cause content to break up in odd places on mobile screens.

Fixes: Take out all the whitespace and use the align tools on the editing toolbar instead. Organize lists of information into tables.

## Managing pages

### Saving a page

The **Save** button allows you to save the changes that you made on the page you’re editing. Saving is *not* the same as submitting the page for approval. Instead, it allows you to return to the page again to make changes until the page is ready to go live on the site.

If you leave a page without saving it, you will get a prompt asking you whether you want to save the changes or discard them.

### Submitting for approval

**Is your page ready to be approved?**

* Check your spelling and grammar.
* Make sure all the links work.
* Is all the information up-to-date?
* Will the content resize properly on mobile displays? Go to page 52 to learn how to check.

Once you’re sure the page is ready, click on the **Submit for Approval** button at the top.

#### How to cancel the submission

Say you realize that there’s a revision you need to make to the page you just submitted for approval. To cancel the submission, click the **Cancel Submission** button at the top.

#### Email notifications

When you submit a page for approval, you will receive an email stating that the page was submitted for approval. Once the page is reviewed by a web administrator, you will either receive an **Edits Needed** or **Page Approved** email.

PRO TIP:

Sometimes web administrators will type comments for you when reviewing web pages. You’ll see these comments on the **Edits Needed** and **Page Approved** emails you receive.

**Edits Needed**

You’ll receive this email if Marloo CMS administrator has reviewed your page and wants you to make a few corrections.

When you visit that page in Marloo CMS, you will also see comments above the editing region:

**Page Approved**

Your page was approved! Now the changes you made will be visible on the website.

**Cancelled Submission**

If you chose to cancel a page submission, you will receive an email with the confirmation. The web team will receive this email as well.

### Hiding a page

Hiding a page allows you to remove a page off the website without deleting it entirely from Marloo CMS. This is great for temporarily taking down pages that will be used again in the future, such as pages about annual events.

When you are in **Live Web Mode**, hide a page by using the **Hide Page** dropdown menu above the page. Learn more about Live Web Mode on page 19.

If you have access to the **Advanced** tab of the **Properties** dialog (see page 17), you can also hide a page by un-checking the **Visible** box.

### Moving a page

You can change the order of the pages on the site if you have access to that feature.

Simply click and drag the page’s title in the Site Tree. You are only able to move pages to which you have access.

In the example on the right, the Upcoming Events page is being moved to the first position underneath the homepage.

### Adding a page

Generally, Marloo CMS does not allow anyone except an administrator to add pages. This helps to keep the website navigation under control. In order to add a page, email a request to the web team. These are the guidelines for requesting a page:

Before requesting a sub-page, review your page structure first to see what pages already exist on the website.

* **Less clicks.** If information can be consolidated onto one page, do it.
* **Quality content.** If the page is only going to have a paragraph on it, maybe that text can be put on another existing page.
* **Coherent page structure.** Review the order that your pages are in and consider whether they make sense.

After reviewing these guidelines, if you think a new page is necessary, email the web team with the request. Make sure the email contains the following information:

* The title of the new page
* Why this page needs to be created
* Where the new page should be located (under which existing page)

#### Page title

When naming a new page, keep it:

* **Short.** Make the title short. Titles should be less than 55 characters because search engines like Google typically only show the first 50-60 characters of a page title in their search results. Learn more about Search Engine Optimization on page 10. *Are there page name you have in your outline that are too long already?*
* **Simple.** Make the title simple, and think, “No mystery meat.” Don’t make things too ambiguous like: Talk to Us, or Form, or Tell Us What’s Wrong. That could confuse site visitors. *Are there links or page titles you have that would confuse visitors?*
* **Common.** Use common terms.

### Deleting a page

Deleting a page is easy, but it is permanent. There is **no** *Undo* or *Cancel* when deleting a page.

In **Edit Mode**, click on the **Delete** button at the top.

#### Deleting sub pages

If you delete a page that has sub pages, those pages will be deleted as well. However, this dialog box will first appear – just to make sure you don’t mistakenly delete the sub pages.

Accidentally delete a page? No worries! Deleted pages can be restored. Contact the web team with the request.

### Page locks

This feature prevents two people from editing one page at the same time. That could cause different drafts to get overwritten. The feature will let the person who tries editing the page second, know that someone is currently working on the page. The second person who wants to edit the page will not be able to access it until the first person clicks *Log Out* or goes to a different page.

#### Locked out of a page?

If you get locked out of a page, log out and back into Marloo CMS.

## Advanced Text Styling

In the CMS, we use a product called TinyMCE. TinyMCE allows you to easily write up the content of your pages as you would in another software program, like Microsoft Word. Most of the editing options will probably look familiar to you.

### The Styles dropdown menu

The Styles dropdown menu used to be a collection of random styling classes that actually weren’t usable by web editors. We have improved this menu by only adding the classes that editors can use. This makes it much easier for you to customize your content!

### Heading colors

The first category of options in the **Styles** dropdown menu can only be applied to Headings. Learn more about headings on page 23.

The Heading options allow you to change the colors of the Headings. The options will be different based on what site you’re editing for.

To change the color,

1. Click on your heading.
2. Select an option from the Styles menu.

### Buttons

The second category on the **Styles** menu allows you to transform links into buttons of different colors and sizes. Learn how to add hyperlinks on page 25.

The options you have as far as button colors and sizes may vary from the manual based on which website you are editing for.

The following example was created in the CMS:

1. Insert a link. Click inside of it and make sure that the link icons are shaded on the toolbar.
2. Click on **No style** to open the Styles dropdown menu.
3. Scroll down and select one of the button options.

Then, voila! The button becomes large and blue.

#### Remove a Button

There are two ways to remove a button. The first is just to remove the link altogether by backspacing. However, rather than deleting it, you can revert the button back to a regular link. Here’s how to do it:

After you’ve clicked on the link, go back into the Styles menu and click **No style** at the top. That will take the button properties off the link.

### Table themes

The web team started building in table theme options, called *classes*, that web editors can now use to make tables look a little fancier. **Find out how to add these classes to your tables on page 34.**

### Editing the HTML

The editing toolbar lets you add content to your page without directly touching the code that composes it. Due to TinyMCE’s awesome functionality, you don’t have to mess with the code at all – unless you want to.

To see the code that runs your page, click on the blue HTML icon on the TinyMCE toolbar.

Here’s a brief overview of the tags you’ll see in the HTML:

|  |  |  |
| --- | --- | --- |
| Start Tag | End Tag | Function of Tag |
| <p> | </p> | Paragraph |
| <p style=”text-align: left;”> | </p> | Paragraph aligned left |
| <p style=”text-align: right;”> | </p> | Paragraph aligned right |
| <p style=”text-align: center;”> | </p> | Paragraph aligned center |
| <h2> | </h2> | Heading 2 |
| <h3> | </h3> | Heading 3 |
| <h4> | </h4> | Heading 4 |
| <strong> | </strong> | Bold text |
| <em> | </em> | Italicized text |
| <u> | </u> | Underlined text |
| <ul> | </ul> | Unordered (bulleted) list |
| <ol> | </ol> | Ordered (numbered) list |
| <li> | </li> | List item |
| <br /> | n/a | Line-break |
| <hr /> | n/a | Horizontal rule |
| <table> | </table> | Creates a table |
| <tr> | </tr> | Table row |
| <td> | </td> | Table cell |
| <a href=””> | </a> | Link (URL goes between quotes) |
| <img src=”” /> | n/a | Image (URL of image goes between quotes) |
| &nbsp; | n/a | Extra space |
| <!-- | --> | Comment; hides all HTML that’s inside these tags |

**To learn more HTML,** read W3Schools’s tutorials at <http://www.w3schools.com/html/>

## Photo Slides

Added to the CMS in 2014, this feature allows you to add photos to one or more pages very easily. The photos show up where they are designated to go on the template (usually right above the page content).

Here’s how it works:

In the CMS, the images are **not** added to the actual page they will show up on. Rather, they are added to a sub-page called **\_slides.**

As you see in the diagram, the **\_slides** page lives right underneath the page that you want the images to be on. Pages that are siblings of the **\_slides** page (like the two child pages in the diagram) will also feature those slides – unless they have their own **\_slides** pages *or* they run off of a template that does not use the slides feature.

In the Site Tree on the left:

### Add a new **\_slides** page

If a **\_slides** page is already present underneath your page, skip to the next section.

1. Navigate to the page that you want to add the photos to, either by searching for it or browsing for it.

You don’t need to be editing the page. You just need to be at a point where you can see the page in the Site Tree. This is a close-up of this page’s location in the Site Tree on the left:

You can see that it has 2 sub-pages. After you add the **\_slides** page and it is approved, those pages will also contain the photos on that **\_slides** page.

1. In the Site Tree, right-click on the page that you want to add the photos to. This menu will appear:

Then click on **Add Sub Page**:

One of two things will happen, depending on your account privileges.   
Follow the instructions based on what occurs:

So, you’ve opened the **Page Properties** box (shown above).   
Here’s a question for you: Is it grayed out?

### Recommended guidelines for slide images

We recommend that all photos you upload onto **\_slides** pages be the following dimensions:

**2000 pixels wide by 625 pixels high**

Photos with these dimensions are displayed the best on various screen sizes, especially when the photos have purple captions on top of them.

We also highly recommend that you **don’t put text on the images you submit**; instead, use the purple captions to inform visitors about what your images are advertising. See page 71 to learn more about adding captions.

### Add images to ­**\_slides**

1. So, in Marloo CMS, you have navigated to the **\_slides** page, which is located underneath the page that you’ll want the images to show up on.  
   If you haven’t already done so, double-click on it in the Site Tree to edit it.

Like so:

If you didn’t have to create the **\_slides** page, chances are, there might already be some photos showing up on this page.

1. **Insert images as you normally would on other pages.** Simply add one after the other in the order you want them to show up.

Just FYI: The images will automatically crop to the aspect ratio of the first image.

If you add more than one, the images will scroll in a slideshow.

*Exclusive to the CAN-DO Missions site:*   
If you add more than six, the photos will stack in a mosaic.

1. It’s possible to add captions to these photos as well. This only occurs if you add a link to one of the images you upload.

### Creating Captions

1. Click on the image that will have the caption. Notice that the **Insert Image** icon on the toolbar is shaded.
2. Click on the **Insert/Edit Link** icon (which looks like a chain link).

* **Link URL:** This is where you want the photo to take visitors.
* **Target:** The link can be opened in a new window.
* **Title**: This is the large text that shows up on the caption. (See next page.)

The CMS will let you know which photos are linked on your **\_slides** page while you’re editing:

It’s important to know that, on the captions, the large text is taken from the link description and the smaller text is taken from the image description. See below:

|  |  |
| --- | --- |
| 2nd line: Image Description | 1st line: Link Title |
| After you’ve clicked on the image that has the caption, click on the **Insert/Edit Image** icon:  This is where to add the 2nd line of the caption:  **It should be less than 60 characters long.** | After you’ve clicked on the image that has the caption, click on the **Insert/Edit Link** icon:  This is where to add the 1st line of the caption:  **It should be less than 48 characters long.** |

## Shortcodes

In 2013, Billy Eatman implemented a new capability within the CMS called a **shortcode**. A shortcode is a simple code that you can type out, that will let you organize your content in really cool ways. We have released several shortcodes since the capability was created.

The web team may have implemented more since the printing of the manual, in which case an addendum with the new shortcodes will be provided during your web training.

|  |  |
| --- | --- |
| [announcement] | Create a block of text that contains very important information that page visitors should immediately read |
| [content] | Move content to another region of the same page |
| [eventlist] | Pull events from the calendar onto your page |
| [tabs] and [accordions] | Create a section of tabs to organize information into categories |
| [testimonial] | Create a block of text that contains a quote from a person |

### Add a shortcode

You can use the following instructions to implement any shortcode.

1. Get in **Edit Mode** on the page to which you want to add the shortcode.
2. You will directly add the lines of code for the shortcode directly into the editing region. The above shortcode, for example, was produced by typing the following:

Shortcodes will come to life, so to speak, when you are in **Preview Mode.** To preview the shortcode, click on the vertical **Preview** tab.

Since shortcodes are still relatively new features, please contact the web team if you notice any bugs with the way they work.

### Troubleshooting

* **When you preview the page, you get an error.**  
  Review the code that you typed in. This is often caused by accidentally misspelling the shortcode, or adding more spaces than the shortcode requires.
* **When you preview the page, the shortcode (along with the content inside it) does not show up at all.**

Contact the web team. This might be a bug.

### [announcement]

This shortcode produces a box of important information that you want page visitors to read immediately upon visiting your page. Use this one sparingly as you find necessary.

The first part of the code looks like this:

[announcement]

You add that just before the text you want to put inside the announcement box.

Then, you’ll add this line of code right after the text you want to put in the box:

[/announcement]

#### Example:

### [content]

This shortcode lets you move content from the main editing area on the page, to another region on the same page. In other words, you can organize your content into columns.

The first part of the code looks like this:

[content for=”side”]

You add that just before the text you want to move.

Then, you’ll add this line of code right after the text you want to move:

[/content]

#### Example:

|  |  |
| --- | --- |
|  |  |

#### On the main site, these are the [content] areas you can specify:

|  |  |
| --- | --- |
| Content regions   1. side 2. sideB 3. top 4. bottom   These also apply to the following websites: |  |

On landing pages, like the Alumni page, the content regions are located like so:

### [tabs] and [accordions]

Tabs allow you to organize information into sections. They are convenient alternatives to tables and bulleted lists.

The code for making tabs may seem somewhat complicated, but it’s really not too bad.

1. Type in the code to signal that you’re making tabs.

[tabs]

[/tabs]

1. In between those two lines of code, you’ll identify each tab with its own two lines of code:

[tab title=”Title of Your Tab”] and [/tab]

You can add as many tabs as you want.

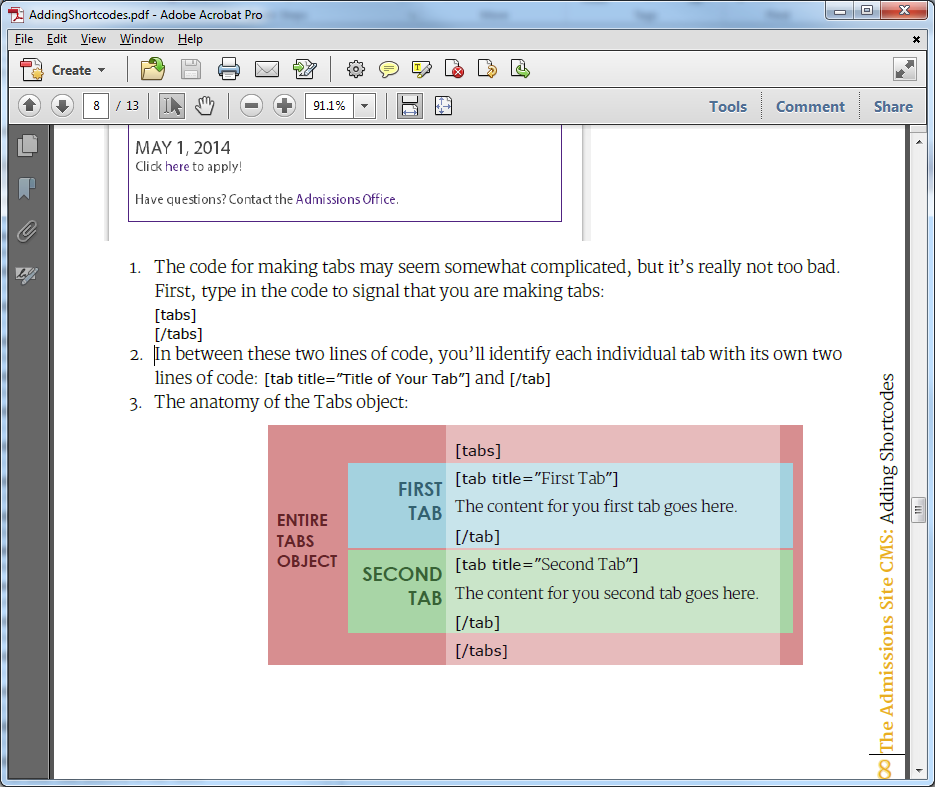
#### Example:

**On the website (Desktop version)**

**On the website (Mobile version)**

**In Edit Mode**

**Entire Tabs object**



### [testimonial]

The testimonial floats to the right side of your page, so it flows nicely with your page content. It doesn’t require a photo.

There are multiple ways to structure the testimonial shortcode.

#### Every parameter is optional

You can choose not to add some parameters to the shortcode. For instance, you can leave out the **title** or the **email**. In fact, you don’t have to add any parameters at all! Check this out:

|  |  |
| --- | --- |
| Edit Mode | Preview Mode |

#### The quote can be a parameter

The shortcode below will produce the same testimonial of the mascot in the previous example:

The only downside to using the **quote** parameter is that you cannot style the text (i.e., make the font bold or italicized).

## For Administrators

This section only applies to those with administrator access to Marloo CMS.

### Page properties

You can change a page’s properties by finding the page in the Site Tree. Right-click on the page’s title and select **Properties** from the list of options.

|  |  |
| --- | --- |
| This is the General tab: | This is the Advanced tab: |
| **Title:** page’s title **URL Name:** title as it appears in the URL;  see page 88 to learn how to change this **Approved:** who approved it and when **Created:** when the page was created **Last Modified:** when and by whom **Last Reviewed:** shows when page was last reviewed after being submitted | **Visible:** hide the page or make it live **Quicklink to Parent:** this feature is no longer in use **Application:** some pages have special widgets on them **Template:** page’s template – see page 87 **Security Group:** change the page’s group **Owner:** change who receives emails from site visitors about problems with the page **Apply Changes to ALL child pages:** check this button before changing one of these options in order for it to apply to all the page’s sub-pages as well |
|  |  |

### Page template breakdown

As shown on the previous page, you can change the page’s template in the **Page Properties** dialog box.

These are the some of the most used templates:

We also have some one-off templates that are usually used only on one single page because it is coded for a specific feature or widget that is used on that page.

Some examples of one-off templates at the time this manual was updated include:

### Advanced editing tools

#### Short URL Name

If you have administrator access in Marloo CMS, you can see this option, as shown above. This feature allows you to shorten page URLs by giving a page a nickname. You can click on the question mark icon to learn more about it.

#### Diff Compare

When reviewing a page that was last submitted, there’s a feature that allows you to see what changes have been made since the page was last approved. To use it while you’re in Edit Mode, click on the **Tools** dropdown button at the top of the page. Then click on **Diff Compare**.

### User management

#### User Manager

You can find the User Manager as an option underneath the **Management** tab. This feature allows you to:

* change a user’s security groups,
* give a user access to more security groups,
* delete a user by deleting all the rows in which his/her email address is present,
* and add a user.

When you add a new user, give them the following security groups by default:

#### Page Owners

As a rule, each web page must have an owner. This owner will receive notifications from visitors who have questions about the page. Page owners:

* MUST be web-trained
* preferably belong to the department that the page relates to

If there is not a person assigned to a page and there is no one web-trained to own it, administrators may assign themselves as the page owner after discussing it with members of the department to which the page relates.

You can view and change a page’s owner in the **Advanced** tab of the Page Properties window. See page 86.