

Quick Start CMS

Web Content Management

Cms.help@utoronto.ca

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FINDING HELP

CMS help files list step by step solutions for your keyword query.

Access the help files without logging on by adding /help/help.htm to your web site address. Example:
www.cmssupport.utoronto.ca/help/help.htm

If you require any assistance in using the CMS, please contact us at cms.help@utoronto.ca

It's highly recommended that all CMS users sign up for content provider training.

Don't use the system often? Come for a refresher annually.

Register at:

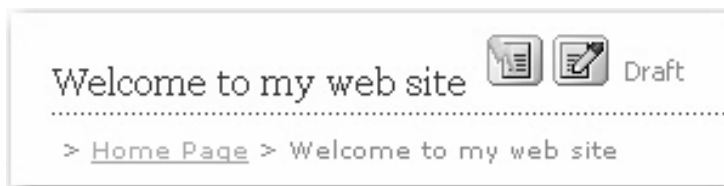
<http://www.cmssupport.utoronto.ca/documents/training/workshops.htm>

LOG ON

Make sure you have the URL for your web site. (See your department web site manager or contact cms.help@utoronto.ca)

1. Open your **internet browser** for editing, use only Internet Explorer or Firefox (v2 only) and go to your web site. If your site doesn't have a login link, simply add /admin to the end of the site URL in the browser's address field. i.e. if your website URL is www.mysite.ca then to access the login page, use www.mysite.ca/admin and the enter key.
2. Enter your **Username** and **Password**.
3. Click **Login**.
4. Once you have logged on to the CMS, you will see the edit icons, only on pages you are authorized to edit. The button on the left in the following illustration is the Quick Edit button. The one on the right is the Full Edit button. If a page does not display these icons, it means you are not authorized to edit that page.

(See your department web site manager or contact cms.help@utoronto.ca)



PERIPHERY YOU MAY NEED:



If you plan to update or add file attachments or images, have them in one location so they are easily located and in the proper format. Files and images must be in the digital asset manager for use in the site.

TIP

Make a folder in My Documents, on your computer, and call it WEB. When you have files to upload for your web site use, save a copy into this folder. Once you are finished with files in this folder, delete them. Only your files for upload or for copying to update pages should be in here.

Turn pop-up blocker OFF always for use with this site. If a window will not open, it is caused by your pop-up blocker settings.


CONTENT EDITOR OVERVIEW

The content editor is located on the Content tab of the Page Editor. When you edit a page by clicking on the  (quick edit) or  (page editor) buttons, the content editor window is displayed.

The editor is not WYSIWYG (what you see is what you get)

Do a page preview or publish to confirm what the finished page looks like. Previews open in a new window and are fully functioning so be sure to close them when you are finished viewing.






In our environment at UofT, the web content should not ever be an original document. It is more productive to have the content open in your word processor and copy–paste into the editor. Please use Right-click in the editor and select Paste Plain Text. This will keep your page structure and remove all the styles which is what we want.

If you paste or Ctrl+v, all formatting will also be copied into your document in the web. To eliminate this styling, there is the sweeper tool . It is better to undo, or delete and right click in the editor and select Paste Plain Text

If you are copying a table into the editor, use the Paste from Word selector when you

right click in the editor to keep the table structure.

TOOLS WE USE IN THE EDITOR

-  Insert Digital Asset
-  Create a link (to internal and external web pages, email hyperlinks and jump links on a page)
-  Break a link. Always break a link and re-create it instead of correcting. Can be used to break Digital asset links also.
-  Paragraph insert. If your paragraph spacing is incorrect, use the paragraph button and delete the original spacing.
-  Before your final publish, use the W3C clean button to clean your html for accessibility compliance.
- Header text is formatted from the Paragraph drop down selector.

The content editor is available on most page types and is used for creating your web content. You can easily format text and insert images, tables, hyperlinks, documents, and much more.



If you have edit rights to a page, you can open the Content Editor by clicking the **Quick Edit** button beside the page's title. The Content Editor in Quick Edit mode does not include any of the Page Editor functionality and thus is primarily used for making text and image changes to your content.



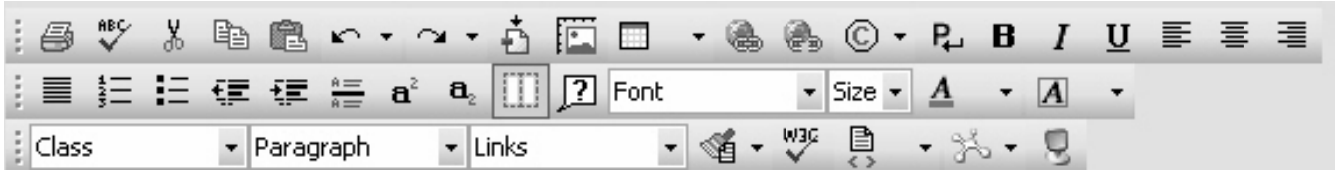
You can also use the Content Editor as part of the Page Editor. To do this click the **Full Edit** button beside the page's title. This opens the full-featured Page Editor which includes the Content Editor as well as all of the other page creation and maintenance functions.

Note: If you do not see the editor buttons beside the page's title, you are either not logged into the Active CMS or you do not have edit rights for that page.

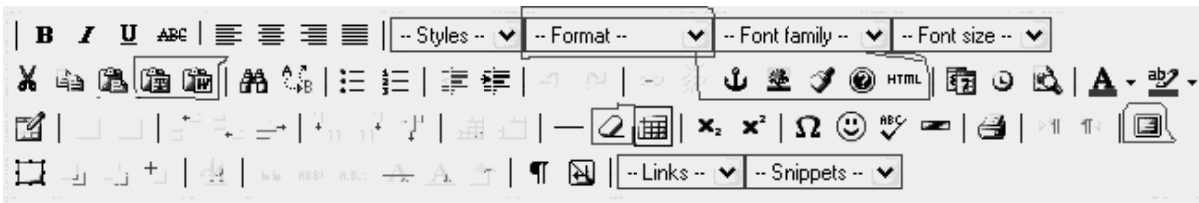
CONTENT EDITOR TOOLBAR

Below are pictures of the Content Editor toolbars and the Editor mode buttons. Mouse-over a button for information on that button's function; click on it to activate it.

RAD EDITOR MENU



TINY MCE



Access to editor tools depends on your user rights. For example, your site manager may give you rights to add text but not to create attachments or links. Or you may be permitted to add an image but not any text.

If you do not have user rights for a button, it will be disabled. If you want to use a disabled feature, speak to your site manager.



PAGE EDITOR TABS

When you open the Page Editor, a number of sections and tabs are displayed, depending on the type of page you are editing, and the configuration of the site you are working on.

PAGE SUMMARY SECTION

The top portion of the page editor contains the Page Summary information which includes the name of the page (what the link will look like), the page's location within the site, the page type and id numbers, and the Show History and Move Page features.

CONTENT TAB

This tab is displayed for all page types with the exception of the Category page type. This is where all of the page content is entered. It contains the General Properties

section for recording teaser information, and displays the content editor windows for adding content.

CHILD PAGES TAB

This is the tab where you can add all of the child pages that will be located below this page in the web site hierarchy. The tab displays a list of the child pages currently attached to the parent page you are editing. You can add, edit, reorder and preview child pages on this tab. You can also control whether the link to the child page is displayed on the parent page or not.

WORKFLOW TAB

The Workflow tab displays the name of the workflow that the page is assigned to. Workflows control which steps the page must go through in order to be published. The Workflow tab also contains information pertaining to the page's current status, its modification and publication dates as well as the next scheduled content review dates.

Notes for each step in the workflow are also available until the page gets published at which point the notes are cleared.

PERSONALIZATION TAB

The Personalization tab is used to restrict page access to certain individuals or user groups. This is useful for sensitive content such as financial information. Once personalization is implemented, users require a user id and password to access those pages on your live site.

METADATA TAB –Search engine ratings tool has been superseded by the HTML title

PAGELETS TAB

If you have content that is used repeatedly throughout your sites, authorized users can create a single instance of that content to be used over and over in different site locations. These single instances are referred to as Pagelets.

Pagelets are like mini-pages, hence the name "pagelets". If a change is required to the information contained in the pagelet, it can be changed once, in the Syndication Manager, and then all instances of that content are automatically updated so that all pages and sites where the pagelet is used reflect the change.

Pagelets are added to pages on the Pagelets tab. However, the tab is only displayed if the page's template includes special pagelet tags.

CREATING PAGES

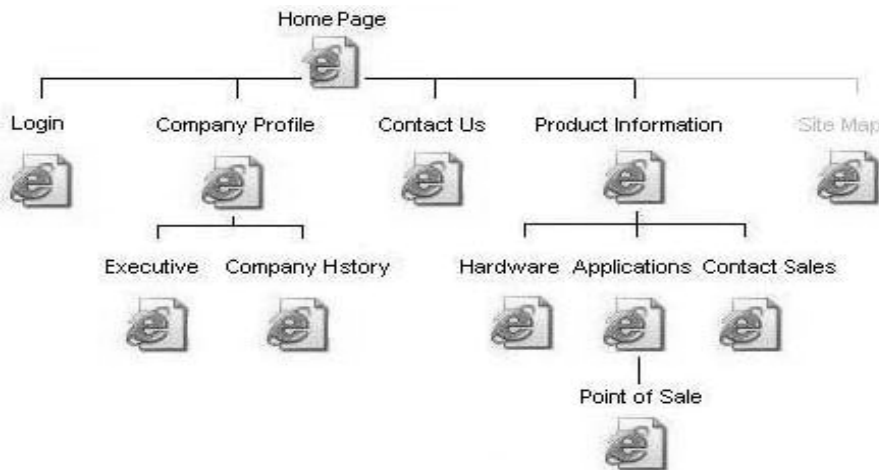
Pages are created by adding child pages to an existing page. The page you add the child pages to becomes the parent page for the ones you add.

When your site is created, a Home page is automatically created. This is the top-most page in your new web site hierarchy. All other pages and groups of pages get created on the Child Pages tab of the Home page.

1. Log on to the Active CMS.
2. Edit the page where you want to add a new page. This is the parent page that you are going to add a child page to.

Using the diagram below as an example;

Suppose you want to add a Company History page at the same level in the hierarchy as the Executive page.




3. Edit the **Company Profile** page and go to the **Child Pages** tab.
4. Mouse over the **New** button and select the **General Content 2** page type.
5. Complete the GC2 page information.
6. Click **Save** and submit the new page for publication.

EDITING PAGES OVERVIEW

You can edit pages in Quick Edit mode or use the Page Editor when you need full edit functionality. Quick Edit is for edits to the content area text and graphics only. If you want to create new pages, change the order of pages, edit publication information, view page history or perform any other full edit tasks, you must edit the page using the Page Editor.

Important: When you log into the CMS and attempt to locate an existing page, you will only see the page in the View mode if it has been published. If the page has never been published (a draft page), you must edit the parent of the published copy of the page, go to the Child Pages tab, and select the page you want to edit from there.

EDITING A PAGE WITH THE PAGE EDITOR

1. Log into the Active CMS and locate the page you wish to edit.
2. Click on the  button.

QUICK EDIT MODE

Click on the  button.

Note: You will only see the icons for editing a page if you have rights to edit the page and if the page has a current status that permits edits.

3. The editing window will open on the page and you can make edits to the text, graphics, links, etc within the main content area of the page.

4. When you have finished making quick edits, right-click on the  button and select **Save**.

5. Click the  button again and submit the page for publication.

EDITOR - INSERT DIGITAL ASSET

Use these procedures to add, locate and insert digital assets when you are working in the content editor window of your pages.

INSERTING AN EXISTING DIGITAL ASSET

Use this procedure to insert a digital asset (image, PDF, text file, etc.) into the content editor window of your page. If the digital asset is not yet in the digital asset library, you must add the digital asset to the library first using the procedure below titled

ADDING DIGITAL ASSETS TO THE LIBRARY.

ADD A FILE TO A PAGE AND THE LIBRARY FROM THE EDITOR WINDOW

1. Place your cursor at the location where you want to insert the asset.
2. On the toolbar, click the **Insert Digital Asset** button.
3. Locate the image in the **Asset Library**.
4. Click on the asset.
5. Select whether you want the asset to open in the **Same Window** or **New Window**.
6. Click **Insert**.
7. Click **Save** once the asset is inserted into your web page.
8. Make other edits, **Save** and submit for publication.

ADDING DIGITAL ASSETS TO THE LIBRARY

Use this procedure to add a digital asset to the digital asset library. Once an asset has been added to the library it is available for insertion into your web pages.

1. On the toolbar, click the Insert Digital Asset button.
2. Click on the Add tab.
3. Type in a Name for the digital asset. This is the display name that will appear in the digital asset library.
4. Enter the Description of the asset. For example, you may wish to enter copyright information or author, artist, photographer information and important descriptive information. This field allows a maximum of 1000 characters.
5. Enter an Alt Tag for the digital asset. The text you enter here will be displayed when users place the mouse pointer over top of the asset image or link.
6. In the Upload field, click Browse and select the file to add to the library.
7. In the Assign to Folder field, select the digital asset folder you want to put the asset into.
8. Click Insert. This will add the digital asset to the digital asset library and insert it in the content editor window.

FINDING DIGITAL ASSETS

Use this procedure to search for a digital asset that you know has already been uploaded into the Asset Library.

1. On the toolbar, click the Insert Digital Asset button.
2. Choose one of the following methods to locate the digital asset record:
 - a. Using the Search, enter a key word contained in the description

. by Digital Asset Folder, hunt and peck

3. Once you have located the desired digital asset, click Insert.

When viewing search results in the Digital Asset Manager, you can sort the columns of information by clicking on the column headers.

You can also view thumbnails (small images) of the digital assets in the search results by clicking on the Show Thumbnails checkbox next to the Search field.

PREVIEWING PAGES

Use the preview functions to view pages before publishing them. This allows you to see how they will look once published and make any necessary adjustments before publishing the page.

While editing the page, click **Preview** (on the page action bar at the bottom of the page).

If the Preview button is not there, speak to your site manager. It may be that they have turned off access to the button for this page type or it may be that the page type does not allow previewing (such as with Category pages).

PREVIEWING A WEB PAGE ON THE CHILD PAGES TAB

1. While editing the parent page, go to the **Child Pages** tab.
2. Locate the page to preview in the list of child pages and click the **Preview** link on the right hand side.

ACTIVATING PAGES

Use this procedure to activate a page that has never been published or to reactivate a page that was previously inactivated.

1. Log on to the Active CMS.
2. Edit the parent page of the page you wish to activate.
3. Go to the **Child Pages** tab and locate the page to activate in the list of child pages. **Note:** DO NOT click on the link to the child page. You can only activate the page from the Child Pages tab of the parent page.
4. Check the **Active** checkbox to activate the page.
5. Click **Save** and submit the parent page for publication.

INACTIVATING AND DELETING PAGES

There are two ways you can remove a web page from your site. One way is to inactivate the web page; the other is to archive it.

Note: When you inactivate a web page you can reactivate it later. When you archive a web page it can no longer be reactivated by users. Site managers have access to the site archive manager.

These procedures apply to pagelets as well as web pages.


INACTIVATING WEB PAGES

Use this procedure to inactivate web pages rather than delete them. Inactivating is useful if there is a possibility that you would want to reactivate the page in the future.

1. Edit the page to inactivate.
2. In the **Page Summary** section, uncheck the **Active** checkbox.
3. Click **Save** and submit for publication.

Inactivated web pages can be reactivated later if you decide you want to use them again.

DELETING (ARCHIVING) WEB PAGES

WARNING: Archiving a web page removes it from your web site. If you simply want it to not be displayed, inactivate the page instead of archiving it. Select Numeric if you wish to order the child page links in the order they were created in, or if you wish to adjust the list of child links manually by moving pages up or down in the list. To move pages up or down, click on the Up and Down Arrows (). You can also move pages by clicking on the number beside the page and typing in a new number.

1. Edit the parent page of the page you wish to delete.
2. Go to the Child Pages tab and locate the page in the list.
3. Check the Archive checkbox.
4. Click **Save**.

REORDERING CHILD PAGE LINKS

Use this procedure to change the order of the child page links as they appear in the content area of the parent page. You can order the pages numerically, in the order they were created in, manually, or alphabetically. This is accomplished by reordering the child pages on the Child Pages tab of the parent page.


Note: When you order pages alphabetically you can no longer manually sort a single child page link. It is an all or none application. Also, alphabetized links are displayed with 25

links per page. So rather than scrolling down a long list of child links, only 25 per page will be displayed and users will have to page through them to locate the desired link.

1. Log onto the Active CMS
2. Edit the parent page that contains the child links you wish to reorder.
3. Go to the Child Pages tab.
4. At the top of the list of child pages, there is a Sort Order option. Select Alphabetic to organize the pages alphabetically. Each time you add a child page, it will be inserted alphabetically in the new order.
5. Click **Save** and submit parent page for publication.

MOVING PAGES WITHIN A SITE

Use this procedure to move one or more web pages to a different parent page in the web site. When you move a parent page, all of the child pages also move. This procedure does not apply to pagelets as pagelets cannot be moved.

1. Log into the Active CMS.
2. If the page you want to move is published, navigate to it and click  .
3. If the page is not published, edit its parent page, go to the Child Pages tab and click on the page you want to move.
4. In the Page Summary section at the top, locate the Move Page field.
5. Click on «Select Page».
6. Select the new parent page and click OK.
7. When the page is redisplayed, click Save and submit the parent page for publication.

***Note:** If the page you are moving is overdue for Review, you cannot move it. You must make sure the page is Reviewed and then move it. If a page is overdue for review, it will display a message next to the page's Edit icon.*

PERSONALIZING PAGES

Use this procedure to restrict access to the web page to certain user groups. You can also force a page to use the same personalization settings as the page's parent.

1. Edit the page you wish to personalize.
2. Click on the Personalization tab. If the tab is not displayed, see your site manager.
Note: Only authorized users can set personalization settings.
3. Check the Personalize Content checkbox.
4. If you want to use the same personalization settings as this page's parent page, check the Use Parent Members checkbox. This will restrict access to the same groups as are set for the parent page.

5. If you want to use different personalization settings than the parent page, uncheck the Use Parent Members checkbox and click the Viewer(s) link. Select the Groups and Individuals that you want to allow to access this page and click OK.
6. Click Save and publish.

RESTORING OLDER VERSIONS OF PAGES

The page history tab is used to track and restore all version of a particular page. When a page is changed, the older version continues to be accessible through the history tab of the page.

1. Log on to the Active CMS and edit the page you wish to change.
2. Be sure you have checked the Show History checkbox.
3. Go to the Page History tab.
4. Click on the Version number of the page that you wish to restore. The system displays the current page content.
5. Click Restore.
6. Click OK to confirm the restoration. The page, as well as any of the metadata information, is restored.
7. Make desired edits to the restored page.
8. Publish the page.

PAGE TYPES OVERVIEW

This overview discusses how your site gets its look and feel. It also provides a brief description of the standard page types used for creating all of your different types of web content (content pages, links, galleries, surveys, and more).

How your pages get their look

The published pages on your web site appear as they do because of two main components:

- a page template

- a page type that controls the formatting and functionality of the page

TEMPLATES

Page templates contain layout, design and formatting information that determines how your finished pages look. Templates control both the outer regions of your web pages, defining how the header, footer, navigation panes and other features of your site will look, as well as the central content area of each page.

By using templates to control site formatting, the CMS keeps design and content separate. This means that users focus on entering content, while templates control how that content will look. If a change to the site's look and feel is required, the template can simply be updated and the content will automatically conform to the new template design. With templates, maintenance of the site design is made easy, and consistency across the site is maintained.

There is generally a template for each section of your site that requires its own look and feel in terms of colours, layout, menus, etc.

Your site's template is managed by the CMS team. Please contact us at cms.help@utoronto.ca if you'd like changes or have questions on your current template.

PAGE TYPES

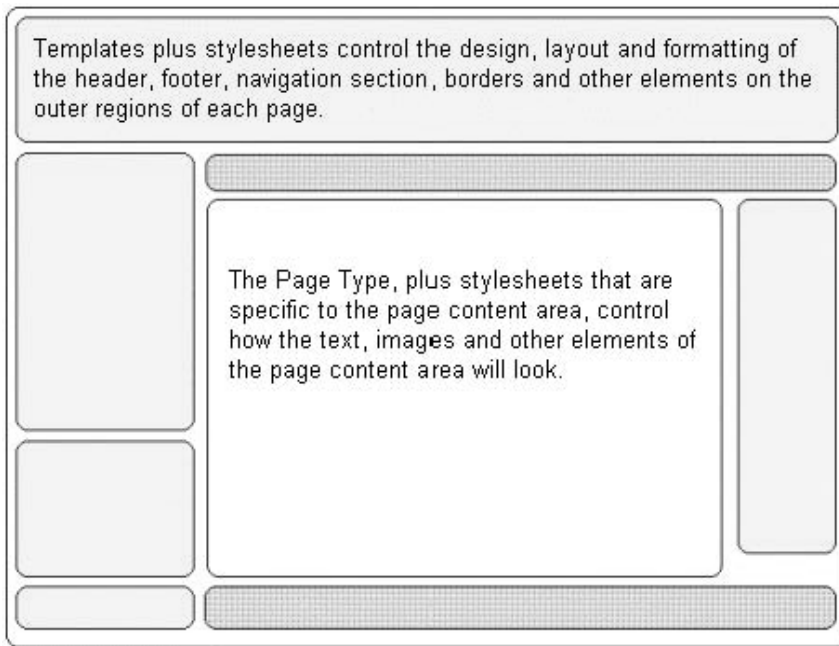
Page types control the central content area of each page. Depending on the page type you select when creating content, different formatting and functionality will appear in the content area. For example, when you create a Login page, the page automatically includes a pre-programmed, functional login page complete with username and password field, and the ability to automatically setup a Forgot Password link for users.

There are a number of standard page types included with the CMS installation. The most commonly used page type is the General Content page type. This page type provides a single content editor window for entering content. More information on standard page types is listed below.

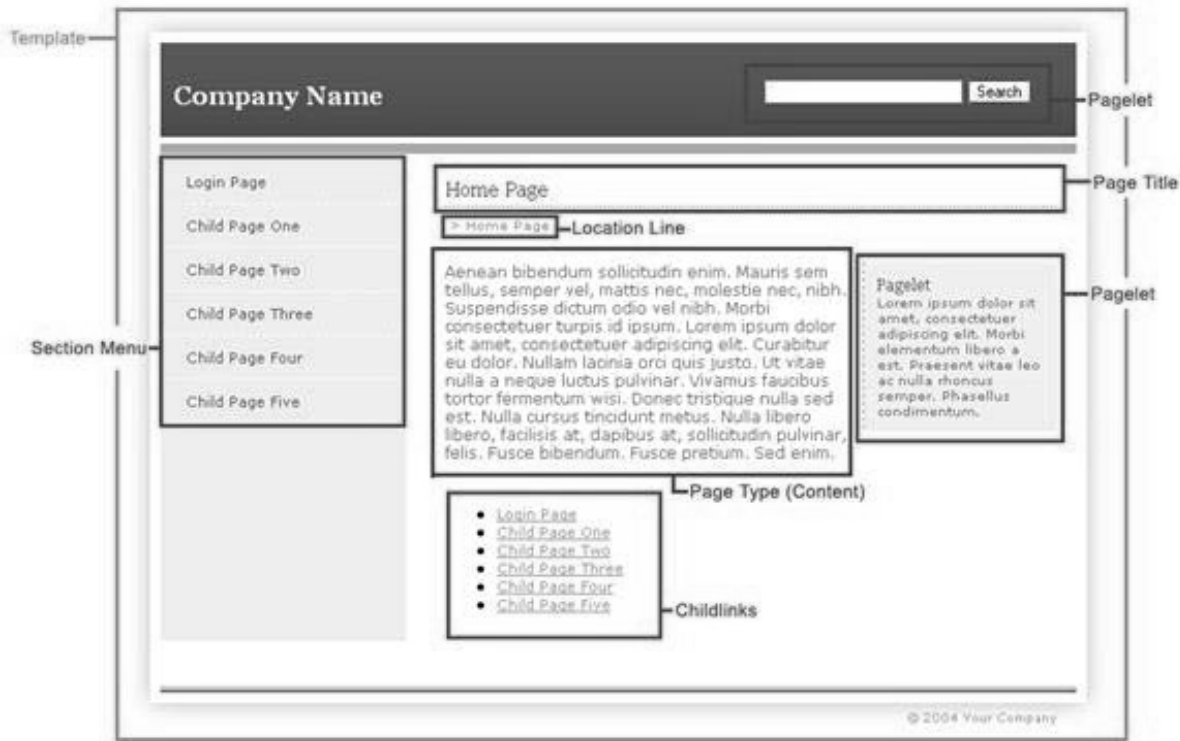
In addition to the template design information, each page type uses a style sheet (css) that controls fonts, image placement, paragraph formatting and header styles. As with templates, these style sheets can only be edited by authorized users, thus ensuring additional levels of consistency throughout your site.

THE FINISHED PAGE

The final published web page is thus a combination of the template, the page type and the content you enter.



The names of the elements that comprise the completed page are illustrated in the following sample page:



SECTION MENU

The section menu is the navigation portion of the page. It is generally located either down the left side of the page or across the top of the content area. The navigation is provided either by links or buttons that allow users to navigate to different sections or pages within the site.

PAGELET

Smaller reusable pieces of content that can be displayed on any page type in a designated location. They are created once and can then be added to any page, provided the page template is setup to display pagelets.

LOCATION LINE

The location line, also sometimes referred to as a "breadcrumb trail", is created dynamically to show users where they are in the site.

CHILD LINKS

When you create child pages on a page, you can display links to the children on the parent page. This display is optional.

STANDARD PAGE TYPES

The Active Content Management System includes the following standard page types.

ATTACHMENT

The Attachment page type allows you to add a direct link to a digital asset (image, document, text file, PowerPoint presentation, excel spreadsheet and others). The links to these digital assets can be added to the navigation section of your web page as well as to the central content area.

CATEGORY

The Category page type is used to create drop-down menus in your site's navigation area. The category you create appears as a link on the navigation pane and when you click on it, a list of pages that the user can go to are listed in the drop-down menu. The pages that the user can go to are the child pages of the category page. Using this page type adds an additional navigational tool for users of your site.

GENERAL CONTENT

This is the most commonly-used page type in the system. General Content pages provide a single editor window into which you can type text, insert images and files, as well as other graphic material.

HOME

Home pages are automatically created when your site manager creates a new site. Access to the edit functions for the home page are usually restricted to one or two individuals within your organization.

LINK

The Link page type allows you to create internal and external links on your web pages. Links can be added to the content area of your web pages, but they can also be included as a link in the navigation section of your page. Link page types also allow you to specify if you want the linked item to open in new window, be displayed in the current window or get displayed within a frame on the page.

LOGIN

The Login page type allows you to create login pages throughout your site. Some of the standard features of this page type include: the handling of forgotten passwords, remembering usernames between sessions, and the ability to easily create a user account application process. Login pages can be used in conjunction with Application Form pages to create a user account application feature.

SEARCH

The Search page type allows you to create a site search for your web site. You can specify whether the search is for the one site only or for all of the sites managed by your CMS.

SITE MAP

The Site Map page type automatically creates a site map for all, or portions, of your web site. You can define the display format of the links as well as how many page

levels will be available.

SURVEY (FORM)

This page type is used for creating forms for your site that your users can fill out and submit. This would include surveys and order forms or any other type of information gathering form, with the exception of a user account application form (see Application Form).

NON-STANDARD PAGE TYPES

A number of additional page types are available for use with the CMS. Available custom page types currently include:

Application Form

Calendar

Calendar Event

Digital Asset Gallery

Photo Gallery

Quick Poll

TROUBLESHOOTING

BUTTONS IN MY HTML EDITOR ARE NOT WORKING OR ARE NOT THERE

Your user rights control which buttons are available in the content editor windows. If there is a button you need that does not work, speak to your site manager.

DIGITAL ASSETS FOLDER DOES NOT SHOW UP IN THE LIBRARY WHEN INSERTING AN ASSET

The Digital Assets Library can display a maximum of 5 folder levels deep, including the top-most level Digital Assets folder. If your folder is below the 5th level, it will not appear when you are trying to insert digital assets. Move folders to a higher level within the Digital Assets Manager. If you do not have access to the Digital Assets Manager, see your site manager.

EDIT ICON DOES NOT APPEAR ON THE PAGE I WANT TO EDIT

This indicates that you do not currently have user rights to edit this page. Speak to your site manager.

LINKS ARE LINKING TO THE WRONG PAGE

If you have entered a link and it does not link to the page you expected it to link to, you may need to enter the link in a different format or add a link variable. Carefully review the [Links Overview](#) help topic to see if you are using the correct linking scenario based on the type of site and page you wish to link to. Always use the break a link tool and recreate the link.

PAGES OR LINKS DO NOT SHOW UP IN THE NAVIGATION SECTION OF MY PAGE

Most page types that allow you to create links also allow you to control whether the links are displayed only in the content area, or in the content area as well as the section menu. If links are not displayed, your site manager must use the Site Design Manager to change the settings for the Parent Page to display child pages in the section menu of the page.

PUBLISH BUTTON IS NOT AVAILABLE ON THE TOOLBAR

There are a number of reasons why there is no Publish button available on the page. You may not have rights to Publish the page you are on. Or, if the page is overdue for

Review, you cannot publish the page. If the Publish button is not displayed but there is a Review button, you need to Review the page and then the Publish button will be displayed.